

THE ECONOMIC VALUE OF LANDSCAPE IN THE SCOTTISH BORDERS



marketing accommodation businesses in the new Teviot Valleys Special Landscape Area

a survey of practices and opinions of business owners

September 2012

commissioned by



The Association for the Protection of Rural Scotland
Scotland's Countryside Champion



Tented Camping as it should be

THE ECONOMIC VALUE OF LANDSCAPE

A survey of marketing practices and opinions
of accommodation providers
in the new
Teviot Valleys Special Landscape Area
Scottish Borders

Contents

- Executive Summary
- 1. Introduction
- 2. Commissioning Parties
- 3. Policy Background
- 4. Teviot Valleys SLA – supplementary planning guidance (SPG) justifications
- 5. Survey and response rate
- 6. Survey results and commentary
- 7. Survey conclusions
 - 7.1 Tourism and Marketing
 - 7.2 Planning
 - 7.3 Comparison with VisitScotland & Mountaineering Council of Scotland / British Mountaineering Council positions
- 8. Next steps
 - 8.1 Joint marketing initiative
 - 8.2 Possible roll out of survey to other SLAs

Appendices:

- Appendix 1: Map of Teviot Valleys Special Landscape Area
- Appendix 2: Teviot Valleys SLA - Forces for Change: extracts from Supplementary Planning Guidance
- Appendix 3: Survey form
- Appendix 4: Schedule of Comments by respondents
- Appendix 5: Methodology

Contact and Queries:

Alan Bailey MRICS

Ruberslaw Wild Woods Camping
Spital Tower, Hawick TD9 8TB
01450 870213
office@ruberslaw.co.uk

Executive Summary

A **major marketing opportunity is being lost** by the Scottish tourist industry operating within the spectacularly unspoilt "Carter Bar Panorama" in the Scottish Borders. Coherent management of scenic assets, cultural heritage, tourism and events programmes (as provided by the Northumberland National Park Authority) does not exist on the Scottish side of Carter Bar.

This private sector survey of accommodation providers in the new Teviot Valleys Special Landscape Area gives clear documented evidence of the **economic value of the area's beautiful unspoilt scenery**, which is a major element in the marketing of these businesses.

The survey shows that a very large majority (90%) of businesses already refer to the area's beauty in their marketing, and expect the recently conferred SLA designation will help further. A very high proportion (93%) would or might be interested in a joint marketing initiative if funding assistance were available.

Accommodation businesses in the Teviot Valleys SLA provide around **164 FTE jobs** – a very significant number in this relatively sparsely populated rural area, especially if the knock-on multiplier effect is also considered. The link between scenery and local jobs is obvious. As a result, a high number of local jobs would be undermined if the area's **scenic assets are not well managed and protected**.

Employers in this local employment sector, which is vital to the area's economic and social health, use the Borders' beautiful **scenery as a key marketing tool**. They are very concerned about the only non-agricultural, non-forestry Force for Change identified in Scottish Borders Council's designation of the SLA.

Currently three large scale wind farms with a minimum combined total of thirty five large scale turbines are at various stages in the Planning process. Approval of any one of these would set a precedent that could turn the Teviot Valleys SLA hills into what SNH describes as a "windfarm landscape"¹

76% of respondents said large scale turbines are unhelpful to marketing the area, and 69% felt large scale turbines would be unhelpful in generating repeat business. A third (33%) had discussed the issue with customers or listened to their views, and all of them reported that customers had negative views of wind farms. Only one respondent reported hearing support for wind turbines.

The **64% response rate** shows the strong appetite amongst accommodation providers for these concerns to be addressed. There is very strong support for a joint marketing initiative to help generate business (if some funding assistance can be found), and for protecting the area's scenic assets from non-agricultural or non-forestry change.

This is a clear signal to policy makers, government agencies, and funding managers that an opportunity exists to work with a receptive group of employers to **support and boost the local Tourism industry**.

¹ SNH "Siting and designing wind farms in the landscape" 2009 item 5.5

1. Introduction

The mountain pass of Carter Bar on the A68 is the most spectacular entrance into Scotland from England.

The “**Carter Bar Panorama**”, seen from the viewpoint sitting 418 metres above sea level, is an uninterrupted 180 degree view looking northwards over hills and valleys unaffected by urbanisation and industrialisation.

It lies within the **Cheviot Hills Special Landscape Area (SLA)** and overlooks the **Teviot Valleys SLA**.

This gateway to Scotland is no less beautiful than the English side of the Carter Bar, which is in a **National Park, bringing marketing advantages to local tourism** businesses who are able to distinguish themselves as being at the top of the “scenery desirability” scale (see www.northumberlandnationalpark.org.uk)

A major marketing opportunity is being missed on the Scottish side of Carter Bar, as it appears the economic value of our landscape assets is not fully promoted by policy makers, tourism managers or even businesses and residents of the SLAs.

This survey was commissioned to provide data from accommodation providers in the Teviot Valleys SLA on:

- how they contribute to local employment
- how they currently value the local landscape
- their appetite for improving marketing on the basis of the SLA designation
- how the government-promoted deployment of large scale wind power stations within the “Carter Bar Panorama” is viewed by customers and in marketing terms (wind power developments are listed by Scottish Borders Council as the SLA’s only non-agricultural or non-forestry “force for change”)

The aim is to **inform policy making, marketing and tourism management** at both local and national levels to ensure visitors to Scotland get the best the Scottish Borders has to offer. The results of this survey give an insight into the economic value of landscape in one SLA, and a basis for thinking about scenic assets throughout the Scottish Borders.

2. Commissioning parties

This survey was commissioned by the Association for the Protection of Rural Scotland (APRS) in partnership with Ruberslaw Wild Woods Camping (RWWC), a tourism business at the heart of the Teviot Valleys SLA.

The Association for the Protection of Rural Scotland:

APRS is the charity which promotes the care of **all** of Scotland’s rural landscapes The aims of APRS are to:

- Protect and enhance Scotland’s rural landscapes for future generations
- Promote effective planning and landscape protection systems in Scotland
- Encourage genuinely sustainable development in rural Scotland
- Raise awareness of the importance of Scotland’s landscapes to its people and economy
- Promote the activity of land managers who care for Scotland’s landscapes

What APRS does includes:

- Working in partnership with individuals, other charities, local authority, government and public bodies
- Taking an active part in national policy development and advocacy
- Advising members of the public on how to respond to proposals which affect their local landscapes
- Publicising our work to our members and beyond through our website, quarterly newsletter *Rural Scotland* and regular email bulletins

APRS is a registered charity, entirely dependent on voluntary donations. APRS is based at Gladstone's Land (3rd Floor), 483 Lawnmarket, Edinburgh EH1 2NT 0131 225 7012 www.ruralscotland.btck.co.uk . APRS is a Scottish Charitable Company limited by guarantee, registered no 154563; Scottish Charity Number SC016139.

Ruberslaw Wild Woods Camping

Ruberslaw Wild Woods Camping is an innovative tourism camping venture based in the heart of the survey area, the Teviot Valleys SLA, providing high quality pitches for tented campers in a restored Edwardian Walled Garden, and wild pitches in 300 acres of woodland and heather on the slopes of Ruberslaw, an iconic Borders landmark.

RWWC became a commissioning party for two reasons:

- As a first step towards forming a local tourism business group for the SLA so as to approach The VisitScotland Growth Fund, which is designed to support industry groups with marketing projects.
- To see to what extent other local tourism businesses ascribed an economic value to the landscape of the SLA, which RWWC finds is fundamental to attracting customers

Ruberslaw Wild Woods Camping is a trading name of Spital Tower Property Ltd, a Scottish Company Registered No. SC40067 based at Spital Tower, Hawick TD9 8TB Tel 01450 870213 www.ruberslaw.co.uk

3. Policy background

When Scottish Borders Council consulted on its Local Plan in 2005, a number of objections pointed out that Landscape Designations had not been reviewed for around 40 years, and called for this to be remedied to take account of modern development pressures.

In 2007 the Reporters at Public Inquiry supported these calls and in August 2012 Scottish Borders Council approved new landscape designations, issuing "Supplementary Planning Guidance: Local Landscape Designations August 2012". This SPG complements the spatial strategy set out in the "Supplementary Planning Guidance - Wind Energy" issued in May 2011 in the management of the Region's scenic assets.

The SPG on Local Landscape Designations included the designation of a new Special Landscape Area of Teviot Valleys (See Appendix 1 for map and Appendix 2 for Justification)

4. Tevlot Valleys SLA – SPG justifications

The SPG on Local Landscape Designations sets out Statements of Importance for each SLA. These encapsulate the justification for the designation. The SPG says:

“The Teviot Valleys was considered to be a new proposed Special Landscape Area because, after the evaluation and scoring, it was felt that a coherent proposed SLA could be formed by combining a number of individual landmark features. Therefore the proposed SLA combines a number of LCUs of different types, to create a composite landscape of hill and valley.of high quality landscape.....” (Page 41)*

* Landscape Character Units

This clearly identifies the coherence of the area and the high quality of the landscape. The SPG describes the Jed Valley as “a key gateway into the Borders along the A68” (Page 28)

This new Teviot Valleys SLA mirrors, along with the Cheviot Hills SLA, the National Park designation on the English side of the border, and provides:

- an opportunity for tourism businesses to market themselves in a new way
- a sound policy base for managing the scenic assets on which these businesses rely

5. Survey and response rate

The methodology of the survey is outlined in Appendix 6.

45 businesses were included in the survey, of which 29 submitted valid responses, giving a response rate of 64%. Analysis of question responses is expressed as a percentage of the valid responses.

This high response rate indicates that the questions asked in the survey are relevant to local accommodation businesses, the majority of whom clearly regarded the time taken up by responding to be well spent.

6. Survey results and commentary

6.1. Question 1: For Marketing your business, do you think the status given to the area’s scenery by the new Tevlot Valleys SLA designation will be: Helpful / unhelpful / not a consideration

This question was included to establish how accommodation providers viewed Scottish Borders Council’s action in designating the new Tevlot Valleys SLA.

The results were:

Helpful: 90% Unhelpful: 3% Not a consideration: 7%

The large majority supports the Council’s action and believes it will help marketing.

7% said it was not a consideration. Respondents were not asked to elaborate, but it is known that some of these are located, for example, in streets where views and scenery may not be considered a feature of their attraction.

3% believed the designation would be unhelpful, although this appeared to be at odds with indications elsewhere that walkers constituted most of these respondents' trade.

6.2. Question 2: When Marketing your business, do you refer to the area's unspoilt scenery? Yes / No

This question was included to establish if the non-urbanised and non-industrialised scenery is important to the current marketing strategy of accommodation providers.

The results were:

Yes: 90% No: 10%

The large majority are already marketing their businesses on the basis of the unspoilt landscape of the area.

10% do not refer to this in their marketing. Respondents were not asked to elaborate, but it is known that some of these are located, for example, in streets where views and scenery may not be considered a feature of their attraction.

The percentage split between respondents mirrors the results for Question 1.

6.3. Question 3: Would a joint Marketing initiative promoting Teviot Valleys SLA's scenic assets and tourism businesses be of interest to you, if funding assistance could be obtained? :Yes / no / maybe

This question was included after discussion with Business Gateway's Tourism Business Advisor. Reference was made to local initiatives like the Tweed Valley Consortium (www.visitthetweed.co.uk), a LEADER Project that obtained £120,000 funding up to March 2012, which could be a model for a joint marketing project in the Teviot Valleys SLA. Although no guarantees of funding were made, it was suggested a first step would be to establish if there was a local appetite for something of a similar nature.

The results were:

Yes 48% No 7% Maybe 45%

The response was very positive although not as clear cut as for previous questions. Only 7% were not interested, possibly aligning with the percentiles in previous questions for whom scenery was not a marketing consideration.

Of the positive responses, a healthy 48% expressed definite interest in a joint marketing study if funding assistance was available, while a significant 45% indicated willingness to consider it – possibly indicating a natural caution, wanting to see what might be involved first.

This response could be persuasive in any attempts to raise funds to boost the areas' market profile.

6.4. Question 4: What is the approximate number of full-time-equivalent Employees supported by your business?

This question was included to gain an indication of the contribution to local employment made by accommodation providers in the Teviot Valleys SLA.

The results were that, in aggregate, respondents employ a creditable 76.5 full-time equivalent jobs (FTE's). Some respondents indicated this figure is exceeded seasonally, although details of seasonal increase were not clearly quantified.

The average number of employees per respondent is 2.64 which, when applied to the 52 trading businesses identified (i.e. including the agency-run properties that did not respond) indicates an employment contribution of 137 FTE's

Applying a Scottish Enterprise standard average tourism multiplier² to the 137 FTE's identified above shows that tourism accommodation supports around:

164 FTE's in the Teviot Valleys SLA.

With the link to scenery established in previous questions, this very significant employment figure establishes the importance of scenery in providing local jobs. It is an indicator of the economic value of the area's scenery.

Conversely, the 164 FTE's are the number of jobs to be undermined if the area's scenic assets are not well managed and protected.

6.5. Question 5: For Marketing, do you think Soutra-sized* wind turbines in or adjacent to the Teviot Valley SLA would be: Helpful / unhelpful / not a consideration

This question was included because the Scottish Borders Council's SPG on Local Landscape Designations identifies wind farms as the only non-agricultural or non-forestry "force for change" in the Teviot Valleys SLA. A number of power stations are being proposed well within the "Carter Bar Panorama" (at least 35 turbines included in the Whitton Loch, Birnieknowe, and Cummings Hill power stations) that will add to the large numbers of existing turbines visible in the distance. This question is especially relevant to businesses that use scenery to promote themselves.

The results were:

Helpful: 0% Unhelpful: 76% Not a consideration: 24%

The large majority believes that large scale wind turbines in the area would be unhelpful to their efforts to market their businesses and to generate new business.

None thought that large scale wind turbines would be helpful to the marketing their businesses.

A quarter of respondents indicated large scale turbines would not be a consideration for marketing purposes.

This shows the ratio of businesses regarding wind turbines as unhelpful to marketing compared to those who do not consider the matter is 3:1.

6.6. Question 6: To generate Repeat Business, do you think Soutra-sized* wind turbines visible from your premises would be: Helpful / unhelpful / not a consideration

This question was included to try to assess whether there was evidence that, having visited the Teviot Valleys SLA one or more times, large scale wind turbines would affect repeat business.

The results were:

Helpful: 0% Unhelpful: 69% Not a consideration: 31%

² Scottish Enterprise's paper "Additionality & Economic Impact Assessment Guidance Note: A summary guide to assessing the additional benefit, or additionality, of an economic development project or Programme" 1/11/08 by their Appraisal and Evaluation Team give an employment multiplier for tourism of 1.2. This is an average multiplier that might be affected by local factors that were not covered in this survey.

The majority of respondents indicated that wind turbines would not be helpful in generating repeat business, while 31% believed it would not be a consideration.

This majority is lower than that in Question 5 relating to generating new business, which may reflect the view that visitors who would initially choose to come to an area with a Windfarm Landscape may be less put off by the presence of turbines and therefore more likely to visit again.

The ratio of businesses believing that large scale wind turbines are unhelpful to generating repeat business to those who do not see them as a problem is just over 2:1.

6.7. Question 7: Have you any evidence of Customer's views on wind turbines in scenic areas? Please give brief details:

This question was included to assess if there was any indication that visitors to the area are aware of the potential erection of large numbers of large scale turbines in the area, and what their reactions were.

A quantitative approach to this was thought to be too difficult to achieve without greater resources, but it was thought that anecdotal evidence would be useful as background information.

The responses to this question are set out in Appendix 4.

- 15 respondents (52%) cited opinions expressed by customers. All indicated in various ways that the beauty of the area's scenery is important and that turbines would detract from it. One respondent recorded listening to discussions amongst customers in which some support for wind power was expressed.
- 1 respondent appeared not to cite customer opinions, but to express his own. This indicated that wind turbines would not be helpful to the area.
- 4 respondents said they had no evidence.
- 8 respondents did not answer this question.

The comments make interesting reading, and give a clear impression that customers, including overseas visitors, oppose the idea of the area hosting large scale turbines.

Two comments, perhaps, should be highlighted as giving cause for thought:

"All customers questioned are against it and are horrified that they could be built half a mile from our B&B"

"A high percentage of my guests come from Northern Europe. They comment very favourably on the scenic beauty of the area and often comment that this is not spoilt by wind farms"

7. Survey Conclusions

7.1. Tourism and Marketing

The survey results clearly show that amongst Accommodation providers:

- A very large majority believe the Special Landscape Area designation is useful for marketing purposes
- A very large majority already refer to the area's beautiful scenery in their marketing
- A large majority regard large scale windfarms as unhelpful to marketing to generate new business
- A large majority regard large scale windfarms as unhelpful to encouraging repeat business
- Anecdotal feedback is clear that customers, both local and European, are not pleased at the prospect of large scale wind turbines in the landscape
- A very significant contribution to local employment is made.

7.2. Planning

The survey results also provide useful data for the Planning and Development Control process:

- There is very strong support for Scottish Borders Council's designation of the area as a Special Landscape Area
- There is very significant concern about the proliferation of large scale wind farms in the area.
- The high number of FTE jobs is a strong indicator of the economic value to be ascribed to the area's scenery

Tourism is an economic activity that is accessible to rural communities in a way that many other economic activities are not. It is one of the few opportunities for economic activity that people in isolated rural locations have. But the low customer footfall available to businesses in remote locations can make them fragile and particularly vulnerable to relatively small changes in the commercial environment, such as changes in an area's scenery.

7.3 Comparison with VisitScotland and the Mountaineering Council of Scotland / British Mountaineering Council Positions.

This survey of accommodation providers in a Special Landscape Area complements two recent publications dealing with similar issues:

- "Windfarm Consumer Research – Topic Paper" published by VisitScotland in August 2012
(<http://www.visitscotland.org/pdf/Insights%20Wind%20Farm%20Topic%20Paper.pdf>)
- The Mountaineering Council of Scotland's (MCofS) "Protecting our Mountains – The MCofS manifesto on onshore wind farms" published in June 2012
(<http://www.mcofs.org.uk/lps.asp>)

VisitScotland's publication researched attitudes to "Natural Scenery and Landscape" amongst people who had taken a holiday or short break in Britain over the past year. Respondents to an online survey (only 8% of whom were Scottish) were asked 12 questions about their attitudes, including the need for wind power generation, the

impact wind farms have on natural scenery and landscape, choice of holiday destination, and enjoyment of the holiday. The results of this survey have been cited as showing that the majority of holiday makers are either neutral to or support windfarms sited in natural scenery and landscape.

The MCoS publication takes an opposing view stating:

“it is a potentially serious error to give too much weight to the findings of reports such asor the VisitScotland survey commissioned in 2011. Such work tells us little as it is being conducted at a time when relatively few wind farms have been built in the locations of key interest to tourists.

The MCoS wants to ensure that wind farm developments do not damage our tourism and recreation industries. The value to the economy, especially in remote and fragile communities, is enormous.Scotland's reputation as a place for relaxation and adventure leisure pursuits underpins many permanent and sustainable jobs which our rural areas desperately need. These jobs are highly dependent on the fact that visitors enjoy our wild landscapes.

The conclusions from this September 2012 survey “Marketing Accommodation Businesses in the new Teviot Valleys Special Landscape Area” add some statistical support to the MCoS position.

It shows the large majority of accommodation providers in Scotland's newest Special Landscape Area:

- Provide a significant level of employment in a rural community
- Already refer to the unspoilt landscape in their marketing material and
- Regard windfarms as unhelpful to marketing tourism and generating business

These are all points identified by the MCoS manifesto, which received the support of the British Mountaineering Council, and other respected Scottish organisations.

Two other surveys by respected national organisations are relevant as background: Wild Scotland's “Wind Energy Consultation” polling members in 2006, and Scottish Natural Heritage's “Public Perceptions of Wild Places and Landscapes in Scotland” Commissioned Report No.291 (ROAME No. F06NC03) 2008. Both attempt to quantify attitudes to the value of landscape, and this current survey also adds to the body of data on the issue.

8 Next steps

8.1. Joint Marketing Initiative

The survey shows there is a lot of support for the idea that businesses in the Teviot Valleys Special Landscape Area could be part of a joint marketing initiative treating the SLA as a scenic entity and marketing it as an area to be visited for its scenic value.

Other areas within the Scottish Borders have seen similar initiatives, and the commissioning organisations intend to make various approaches on the basis of this survey to see if funding assistance for such an initiative can be obtained. This may lead to the formation of a tourism business group for the Teviot Valleys SLA.

8.2. Possible roll-out of the survey to other areas

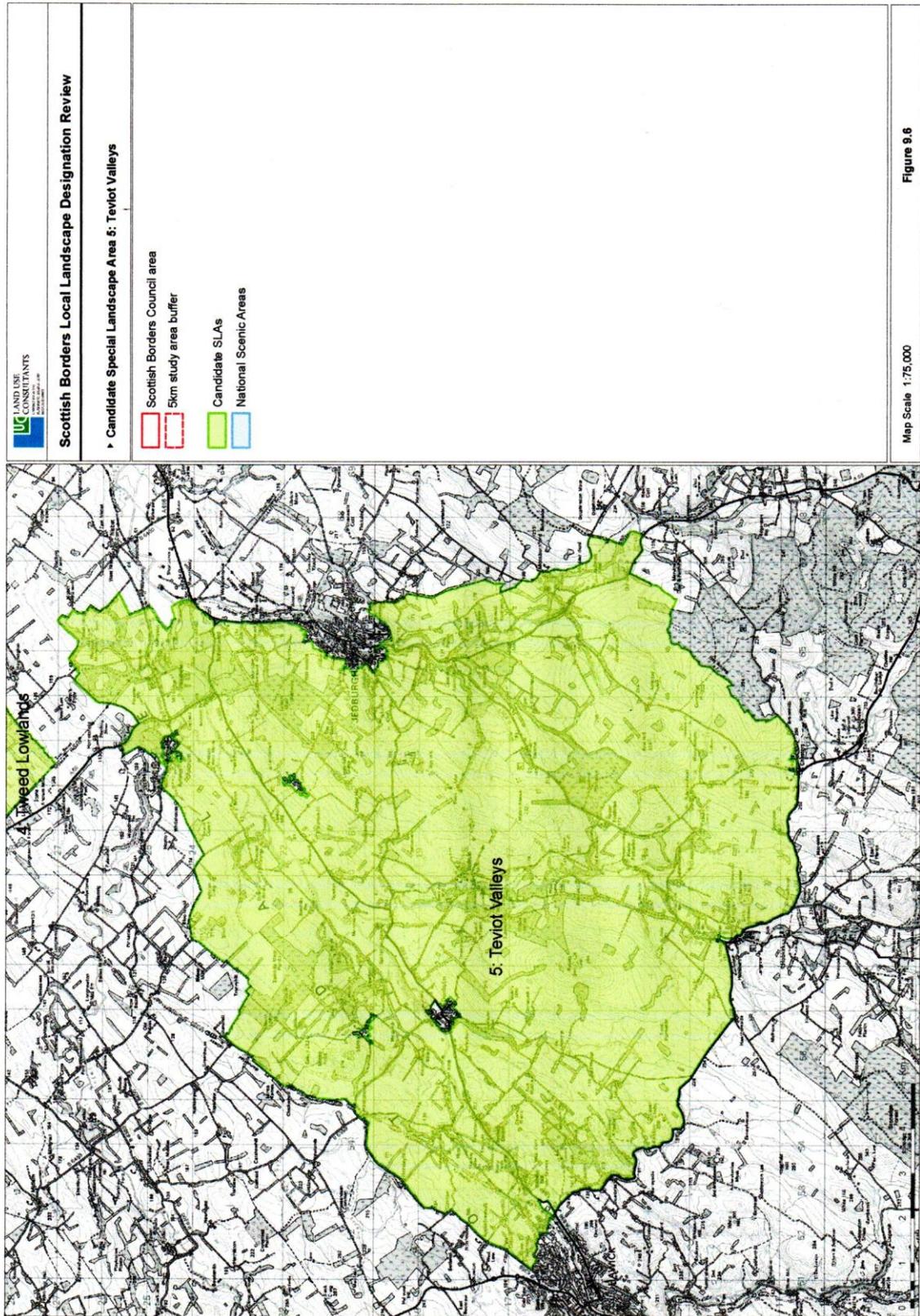
The response rate of 64% indicates the survey was welcomed by the businesses polled.

The commissioning organisations believe that accommodation providers in other scenic areas of the Scottish Borders might well respond equally well to being given an opportunity to express their views on the survey topics.

The commissioning organisations would be happy to co-operate with any groups or agencies interested in rolling out this or a similar survey to other areas.

Appendix 1

Map of Teviot Valleys SLA



Courtesy of Scottish Borders Council's public website

Appendix 2

Teviot Valleys SLA - Forces for Change: extracts from Supplementary Planning Guidance

Extracted from "Scottish Borders Council Supplementary Planning Guidance Local Landscape Designations August 2012":

From Page 19:

"4. Statements of Importance

4.1 For each of the proposed Special Landscape Areas a Statement of Importance has been drawn up to record:

...

- Forces for change
The Forces for Change statement show the threats which could result in an adverse impact on the proposed SLA. This can be used by developers and the development management process to identify development types that would not be encouraged in the designated area. However they can also be used as indicators of how improvements could be made to counter the forces, for example through land management initiatives.

From Page 29

"Special Landscape Area 5: Teviot Valleys

.....

Forces for change:

- Changes in agricultural practices, crops and methods
- Farm diversification
- Changes in management of hedges and hedgerow trees
- Introduction of new woodlands
- Potential for visual impact of development on hills outside the proposed SLA
- Development of wind farms and wind turbines, and associated works

Management recommendations:

- Continue to promote sustainable land management to balance the needs of biodiversity, recreation and tourism
- Encourage the sustainable management of hedges, and where possible seek the reinstatement of hedges and hedgerow trees
- Promote the restructuring of forests, and the use of forest design plans for new areas of afforestation
- Consider the effects of development on hilltops, such as masts or wind farms, which may be visible within the valleys"

Appendix 3

Survey Form

BOOSTING TOURISM in the NEW TEVIOT VALLEYS SPECIAL LANDSCAPE AREA

Scottish Borders Council has just designated particularly scenic parts of the Borders as Special Landscape Areas (SLA), replacing the old "Areas of Great Landscape Value" (AGLV).

The **Teviot Valleys SLA** (on the attached map) is designated for the first time. We think businesses in or very near the new SLA will benefit in 2 ways:

- Tourists' will be more attracted to the area now it is designated as specially beautiful
- The area's scenic value will be better recognised in SBC's policy making & delivery (e.g.: access & planning)

To help make a case for funding from VisitScotland's Growth Fund for marketing the **Teviot Valleys SLA** Please would you answer the following few questions? Your answers will be used to compile simple statistics, but will remain confidential.

Please **circle** or **highlight** your chosen response and return by 9 September 2012 in the enclosed SAE or by email

1. For **Marketing** your business, do you think the status given to the area's scenery by the new Teviot Valleys SLA designation will be:

Helpful / unhelpful / not a consideration

2. When **Marketing** your business, do you refer to the area's unspoilt scenery?

Yes / No

3. Would a joint **Marketing** initiative promoting Teviot Valleys SLA's scenic assets and tourism businesses be of interest to you, if funding assistance could be obtained?

Yes / no / maybe

4. What is the approximate number of full-time-equivalent **Employees** supported by your business?

5. For **Marketing**, do you think Soutra-sized* wind turbines in or adjacent to the Teviot Valley SLA would be:

Helpful / unhelpful / not a consideration

6. To generate **Repeat Business**, do you think Soutra-sized* wind turbines visible from your premises would be:

Helpful / unhelpful / not a consideration

7. Have you any evidence of **Customer's views** on wind turbines in scenic areas? Please give brief details:

** by "Soutra-sized wind turbines" we mean turbines over approx. 45 metres to tip*

If you would like to be kept informed of outcomes from this survey please provide:

Tourism Business name:Email:

THANK YOU VERY MUCH.

*Please return to
Ruberslaw Wild Woods Camping, Spital Tower, HAWICK TD9 8TB*

*Ruberslaw Wild Woods Camping is a Trading Name of Spital Tower Tourism Ltd.
Registered in Scotland No. SC400067; Registered Office as above*

Appendix 4

Comments by Respondents

Question 7: Have you any evidence of Customer's views on wind turbines in scenic areas? Please give brief details:

The responses to this question are listed below, in random order.

1. Yes, a waste of money
2. No views expressed by customers
3. 90% don't like - not conducive to scenic beauty
4. All customers questioned are against it and are horrified that they could be built half a mile from our B&B
5. No
6. details submitted previously & loads of anecdotal comments which could be substantiated if required by email
7. Customers seem generally surprised to learn how many windfarms are targeting the area - in casual conversation. They are definitely more for the unspoilt peace and quiet.
8. Evidence is not required. Almost 100% of visitors to Scotland visit the heritage and view unspoilt scenery, this does not include windfarms/turbines. Look at Soutra, look north of Moffat M74 and Eskdalemuir
9. The only help wind turbines achieve is by way of rent paid to the landowner otherwise they are a burden on the tax payer and landscape and definitely not a tourist attraction
10. No evidence
11. There have been lively discussions among guests, some for wind turbines and some against
12. No none
13. A high percentage of my guests come from Northern Europe. They comment very favourably on the scenic beauty of the area and often comment that this is not spoilt by wind farms.
14. Two guests last week said they thought the Soutra turbines were ugly
15. guests often comment on the unsightly nature of the wind turbines and hope there will be no more as they are a blot on the landscape
16. No comments made
17. Customer's views in my opinion would definitely not want to see wind turbines in our area
18. I only take St Cuthbert's Way walkers here & may give up next year (am getting too old!!) so this does not relate to my business
19. Tourists from both the UK and all over the world cannot understand why wind turbines should even be considered in unspoiled scenic areas. Many are under the impression that this area of beauty is not marketed and quite often stumble across it as they are passing through
20. Customers views are: it would spoil the views and could be noisy. My customers comment on these on my website to hopeful customers

(not all respondents completed Question 7)

Appendix 5

Survey Methodology

The survey was developed to maximise the response rate by:

- making questions sharp and clear
- requiring minimal input from respondents
- confining the survey to a single side of A4 paper.
- while a wide range of subjects were of interest, the questions were limited to core issues in order to hold the respondents attention.

The core issues were identified by the commissioning parties from discussions with businesses that rely on the Borders scenic assets and other parties and groups concerned with landscape preservation. The core subjects that emerged as being of most concern were

1. attracting business in a time of economic constraint
2. preservation of scenic assets from inappropriate development
3. how to attribute economic value to scenery

These concerns apply equally to the whole Scottish Borders, but the survey was limited to the manageable unit of the Teviot Valleys SLA. Additional areas may be polled later.

57 local accommodation businesses were identified from publicly available information on company, agency and community websites (run, for example, by villages or towns) where accommodation is advertised. No private data was used.

The questionnaire was mailed to all businesses thus selected and was followed up after a period by email and phone-call prompts if this contact information was available.

Following this, 12 names were excluded from the original list - 5 not trading currently and 7 being agency properties without a contact to express the owners' views.

Respondents' anonymity was guaranteed. Those respondents wanting to know the outcome of the survey were given the opportunity to identify themselves. Only 6 chose not to do so.

Responses were checked for validity and spoilt papers, and none were excluded on these grounds.
