

SCOTTISH ENVIRONMENT AUDITS

5: Tourism & the Natural Environment

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Tourism and the natural environment

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INTRODUCTION

This Audit explores the relationship between tourism and the environment in Scotland. It looks at the contribution of Scotland's environment to attracting tourism revenue and of the effects of tourism on that environment. It goes on to examine how conservation and enhancement of the environment could increase tourism benefits. From this, some conclusions may be drawn on the economic relationship involving on the one hand, additional income to local economies through tourist spend and on the other, public and private expenditure on maintenance and enhancement of the natural environment.

Section Two focuses on natural environmental assets and explores the motivations of visitors to show the proportion of demand reliant on the environment. Specific visitor numbers to environmental based attractions are given and the numbers taking part in activities in the natural environment. This necessitates an estimation of natural environmental attractions. Tourism trends are examined in Section Three; the volume and value of tourism in Scotland, the geographical distribution and characteristics of sectors, trends and visitor attitudes, perceptions and satisfaction levels. Section Four analyses impacts through the measurement of economic impact of tourism based on environmental resources, and the impact of recreation and tourism on the natural environment. Section Five concludes by exemplifying the best sustainable management practices which balance tourism development with conservation and enhancement.

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1. SETTING THE CONTEXT

1.1 SCOPE OF STUDY

Definitions of, and connections between, tourism and the physical environment are broad, complex and the subject of debate (Stabler, 1997; Hunter & Green, 1995). Although a holistic review of these connections, and a broad interpretation of the terms, tourism and environment would be ideal, it would be unwieldy and impractical for the purposes of this Audit. A reductionist approach is therefore adopted, with a focus on the ecological or natural environment in rural areas; the historic environment is reviewed in a separate LINK Audit (Swanson 2001). Tourism and recreation are often indistinguishable and inseparable. However data available on economic impacts tends to focus on tourism whereas data on physical environmental impacts combine tourist and recreational usage. Further definitions are outlined in more detail in section 1.3.

1.2 RELATIONSHIP BETWEEN TOURISM & THE ENVIRONMENT

Tourism requires three levels of resources: unique attractions and events for tourists including natural, cultural and purpose-built; an infrastructure and superstructure to support tourist activities; and the social and cultural setting, including the hospitality of the community. Successful transformation of these into an effective tourism product requires the efforts of travel companies and tourist organisations to package and promote the destination. All components are interrelated. The landscape and natural heritage of Scotland has long formed the basis for attracting visitors (Smout, 1993; Lister-Kaye, 1994; Hunter, 1995). The core attraction, then as now, is scenery and landscape, perceived to be both wild and natural. There is debate over how 'natural' the landscape is in reality (Hunter, 1995; Fraser Darling, 1964) but it remains natural and attractive in the minds of the majority of tourists. In terms of tourism demand this means that the romantic vista is of greater importance than the ecological quality of the natural environment. Bryden (1999) provides a fuller discussion of landscape and sustainable tourism in Scotland.

If Scotland is to optimise the tourism resource mix to improve the economic performance of the industry, it must plan tourism carefully to preserve and enhance the natural resources on which the industry depends. The role of conservation organisations, in collaboration with tourist agencies, is vital in raising industry and visitor awareness of Scotland's ecology and for finding more sustainable practices.

Tourism and the environment may interact in four ways:

1. *Primary attraction.* The environment as the

key attraction for tourism activities; to gaze, to hunt, to study, to do sport;

2. *A backdrop.* The environment as the backdrop or scenery for relaxing holidays (romantic movement, cultural landscapes);

3. *Environmental costs.* The impact of (or the environmental costs of) tourism development (infrastructure and facilities) and direct tourist activities on the environment;

4. *Contribution to conservation.* The influence of tourism on environmental protection and conservation, providing the economic value justifying preservation of the environment.

Tourism researchers tend to focus on category three; the tourism industry tends to concentrate on one and two; and conservation organisations try to raise awareness aboy the fourth way.

The relationship is further complicated by wide variations in the extent to which forms of tourism rely on the natural environment. Some rely directly on environmental assets such as field sports or wildlife watching, other activities require particular physical landscapes such as recreation in hills and on lochs, whilst tourist facilities and amenities often rely on attractive natural settings — 'you pay for the view'. Establishing a clear model of direct and indirect relationships would require a level of complexity that current data is unable to support. All tourism relies on the natural environment to some extent but for some activities in certain locations the connections are much more direct, (see figure 1 opposite). This is true of the tourist motivation for visiting and the impacts of tourism on the area, both positive and negative. For example:

Strong links. Someone visiting primarily to go dolphin watching, who spends most of their time on that activity and spends most of their money with an operator with conservation objectives.

Medium links. A visitor to an environmental attraction (mountains) or undertaking an activity reliant on the natural environment, such as hill-walking, who stays in the locality and spends money on accommodation and food.

Weak links. Where the Scottish scenery is part of the attraction but is viewed as part of a day trip from a city with little or no expenditure in the rural economy (an alternative example would be a day visitor from Scotland).

The relationship is even more complex and would ideally include several other variables in an attempt to measure flow of expenditure by tourists attributable to environmental attractions and the amount accruing to maintaining the environment. Most tourism data has not been collected with this type of analysis in mind. This Audit has therefore made use of information available from a range of sources in order to provide a broad picture of the general relationship between tourism and the natural environment.

Figure 1: Tourism/environment connections

Direct (i)

The natural environment attracts tourists for sight-seeing (main reason for visiting). Tourists spend money at formal environmental attractions, some of which goes to manage, preserve and enhance the natural environmental attraction.

There are potentially high physical impacts; usually managed and direct economic benefits.

Direct (ii)

The natural environment attracts tourists for outdoor recreation/sport/activity holidays (main reason for visiting). Tourists spend money on the activity operator. Some (less than above) goes to manage, preserve and enhance the natural environment.

There are potentially high physical impacts; sometimes managed and medium economic benefits.

Indirect (local)

The natural environment is one of the reasons for visiting the countryside. Tourists spend money in the local economy in general. Little goes direct to attraction operators or conservation organisations to preserve the environment. Some accrues to local authority through local taxation of tourism businesses and a proportion is spent on environmental improvements.

There are low physical impacts and low direct economic benefits to the natural environment.

Indirect (national)

The natural environment is one of a variety of reasons for visiting Scotland. Tourists spend money in the economy in urban and rural locations. Little goes direct to attraction operators or conservation organisations to preserve the natural environment. Some accrues to the national economy via government through taxation of tourism businesses and a proportion is spent on environmental improvements by national conservation agencies.

There are low physical impacts and low direct economic benefits to the natural environment.

1.3 DEFINITIONS

The Scottish Tourist Board gives the following official definitions of tourism:

A tourist trip is defined as a stay of one or more nights away from home for holidays, visits to friends or relatives, business / conference trips or any other purposes, except for such activities as boarding education or temporary employment;

Tourist nights are those spent away from home using any type of accommodation, or in transit, on a trip (as above);

Tourist expenditure is spending incurred while away from home on a tourist trip and on advance payments for fares and accommodation;

Leisure day visit is defined as a trip made from home for leisure activities, not involving an overnight stay.

Statistics on visitor attractions do not distinguish between tourists and local (leisure day) visitors. Measurement of impacts on the environment does not distinguish between tourists, day visitors (recreation) and local users.

Visitor attraction is a permanently established excursion destination, a primary purpose of which is to allow public access for entertainment, interest or education, rather than principally a retail outlet or a venue for sporting, theatrical or film performances. It must be open to the public for published periods of the year, and should be capable of attracting tourist and day visitors (Lennon *et al.*, 2000). This definition is used in the Visitor Attraction Monitor (VAM) but excludes much of the natural environment as

access is open, there are no formal boundaries and accurate visitor numbers are seldom recorded.

Sustainable Tourism is viewed as part of sustainable development, discussed in the context of planning by Raemaekers & Boyack, (1999).

Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems. (World Tourism Organisation, 1997).

Nature tourism overlaps considerably with ecotourism and wildlife tourism. Although there is no consensus of opinion, it is taken to be the broader term within which ecotourism has a conservation slant and wildlife tourism is a specialist subset.

Nature tourism encompasses all forms of tourism — mass tourism, adventure tourism, low-impact tourism, ecotourism which use natural resources in a wild or undeveloped form including species, habitat, landscape, scenery and salt and fresh-water features. Nature tourism is travel for the purpose of enjoying undeveloped natural areas or wildlife. (Goodwin, 1996:287)

Ecotourism is a term used widely in the travel trade, where it is identified as the fastest growing sector in the industry and as a niche or market segment, generally equated with nature or ecologically based tourism.

An economic process where rare and beautiful ecosystems are marketed internationally to attract tourists. (Steele, 1993).

Ecotourism may therefore be ecologically based but not ecologically sound. Environmental organisations have generally insisted that only tourism that is nature based, conservation-supporting, 'environmentally educated' and sustainably managed, should be described as ecotourism. The term is often used as a synonym for nature, responsible, appropriate, alternative, green and wildlife tourism (Hvenegaard, 1994).

Industry and government, however, focus more on the product aspect, often treating ecotourism as effectively synonymous with nature-based tourism. Environmental management aspects are generally considered under rubrics such as (ecologically) sustainable, environmentally appropriate/responsible tourism (Buckley, 1994). The confusion over the definition and philosophy of ecotourism can lead to tourism management problems in the most fragile natural environments.

There is a very real danger of viewing ecotourism as the universal panacea, and the ecotourist as the magic breed, mitigating all tourism's ills; ecotourism is not a substantially different hybrid from conventional tourism unless it is carefully planned and managed. (Cater, 1993).

Wildlife tourism includes both the faunal and floral components of the environment although it more often refers just to fauna (Shackley, 1996). The definitions and statistics generated have been far from precise, (Lindberg, 1991, World Travel and Tourism Council, 1993). A more rigid, narrow definition is:

Principally, wildlife tourism involves people visiting areas in order to see and gain an understanding of a wide variety of species and doing so in a manner that is environmentally responsible. (Morrison, 1995:3).

2. AUDIT OF ENVIRONMENTAL RESOURCES

An audit of the stock of environmental assets for tourism and recreation must distinguish between general attractiveness, 'viewing the scenery', and nature based tourism, *i.e.* specific visits for hill walking or to wildlife attractions. In the 1997 Highland Visitor Survey, 22% of respondents indicated scenery and scenic views and 12% specified mountain and hill landscapes as the main reason for visiting. (Bryden 1999). This points to differences between the visitor segment that just gaze and those that have an active involvement in the landscape. Market researchers distinguish between rational and emotional motivations in choosing to visit Scotland. Whilst rational reasons are important, emotional ones are more so.

In terms of Scotland as a brand, the natural elements of the country feature very strongly, creating a positive perception of the brand (STB 2000a).

2.1 VISITOR ATTITUDES TO ENVIRONMENTAL ATTRACTIONS

The 1999 Tourism Attitudes Survey, (System Three 2000) provides the most up-to-date information on visitor motivations and attitudes at a wide distribution of sites throughout Scotland, based on face-to-face interviews with tourists. The four main visitor origins sampled were England (47%), Scotland (20%), USA (18%) and Germany (12%).

2.1.1 Main attractions of Scotland

Pre-visit, the main attraction of Scotland for holiday visitors, irrespective of origin or lifestyle, was the landscape, countryside and scenery; three out of ten mentioned this as the main attraction which influenced their decision to holiday in Scotland. Reinforcing this importance, other specific aspects of the Scottish countryside influenced the visit: mountains and hills, 10%; lochs and rivers, 4%; nature and wildlife, 3%; the coast and seaside, 2%. The vast majority of visitors (90%) had associated 'beautiful scenery' with Scotland prior to their visit. Two other phrases had strong pre-visit associations: 'interesting history and culture' (65%) and 'friendly people' (63%). Three others were mentioned by 40 to 50 percent: 'plenty to see and do' (46%), 'good place to relax and get away from it all' (43%), and 'a good hiking and walking destination' (40%).

2.1.2 Activities

In terms of activities undertaken whilst in Scotland on holiday, the most popular was shopping (71%) followed by visiting built heritage (69%) and short walks, under two miles (69%). Wildlife watching scored relatively highly (39%) and hillwalking, whilst undertaken by only 14% of all visitors, had a significantly higher level for German visitors (31%). Other active pursuits in natural environmental settings, such as swimming outdoors, (6%) cycling/mountain biking (6%), mountaineering/rock climbing (3%) and sailing (3%) were significantly less popular. Other more traditional sports also had relatively low participation rates: fishing (5%), golf (4%), horse riding (1%). Respondents were asked to indicate the 'main' activity undertaken on holiday. 'Experiencing Scotland's history' was by far the most popular, with slightly under 30% visiting castles, historic houses, stately homes or gardens. Next was relaxing/doing nothing (17%) followed by low level rambling/walking (13%). Other main activities associated with the natural environment had small but significant scores: hillwalking (4%), watching for wildlife (3%), cycling/mountain biking (2%).

2.1.3 Satisfaction levels

Environmental-based attractions achieved a high level of satisfaction, with 89% stating they were very or quite satisfied with the attraction category 'gardens' and 76% very or quite satisfied

with 'country parks'. 87% were 'quite or very satisfied with cleanliness in the countryside' and 71% were 'quite or very satisfied with cleanliness in towns/cities'.

2.1.4 Post-visit evaluation

Some post-visit opinions showed significantly greater changes than others. Based on their experiences, more respondents would appear to associate Scotland with getting away from it all and a slower pace of life (increase of 36%) and there is an increased association with activity holidays, hiking and walking (28% increase). When asked how important possible aspects of Scotland as a holiday destination were, the most important aspect cited was 'the freshness of the air' (90%). The 'peace and quiet' and the 'amount of space' were also important to most visitors.

2.1.5 Competitive positioning

In terms of visitor types who would enjoy holidaying in Scotland, the vast majority of respondents thought Scotland would appeal 'a lot' to 'those who enjoy outdoor activities' (95%), 'middle-aged people' (93%), those 'interested in history and heritage' (92%) and 'those who prefer peace and quiet holidays' (92%). The most frequently mentioned advantage that Scotland was perceived to hold over similar destinations included 'the beautiful scenery' (27%), 'the friendly people' (19%) and the fact that the country was 'not too far from home or was easy to get to' (18%). Others cited were: 'peace and quiet' (11%); 'history' (11%); 'variety of activities' (8%); 'wildlife/wilderness' (4%); 'hills and mountains' (3%).

These findings indicate that the environment is an extremely important consideration for visitors to Scotland. However, for the majority it is important as a backdrop rather than something to engage with close up. However, there are small but important niche markets where natural environmental assets are the main reason for their visit.

2.2 VISITOR ATTRACTIONS BASED ON THE NATURAL ENVIRONMENT

Environmental attractions in Scotland are informal, free and have relatively open access such as beaches, mountains or lochs. A large proportion therefore is not included in the data in the STB Visitor Attraction Monitor (VAM) as they do not come under the definition of a visitor attraction (see section 1.2). Although much of the natural environmental resource base which attracts visitors has no formal visitor monitoring, other than occasional surveys, an indication of the value accorded to landscapes and habitats is given by the amount of land in Scotland with official conservation or recreation designation status. Scottish Natural Heritage (1999) lists four regional Parks, 36 Country Parks, 29 Local Nature Reserves, 275 Historic Gardens and

Designated Landscapes, four Long Distance Routes, 71 National Nature Reserves, 48 Ramsar sites and 40 National Scenic Areas. The Natura 2000 network of designations, made up of Special Protection Areas and Special Areas of Conservation covers around seven *per cent* of Scotland. These sites reflect the high quality and international importance of the natural heritage and in addition to their primary purpose of conservation are promoted to attract visitors with an interest in wildlife (Broom, *et al.*, 1999).

A number of other conservation organisations own, manage and promote natural heritage sites for visitors. For instance, the Royal Society for the Protection of Birds (RSPB) has over 50 reserves in Scotland covering 46,000 hectares. Although they actively promote only 20 of these reserves, around 400,000 visitors are attracted per year. The National Trust for Scotland manages over 60 properties attracting over 1.7 million visitors in 1999. Many of these include a mix of built and natural heritage and are included in the VAM. Around one third of the properties are based on the natural heritage covering over 72,000 hectares, where the monitoring of visits is more problematic. The Scottish Wildlife Trust runs over 120 wildlife reserves with over 64,000 people visiting four of the main visitor centres. Finally, a review of wildlife tourism in Scotland, (A & M Training & Development, 1997), examined the extent of provision of this type of holiday rather than individual sites. It identified around 350 wildlife tourism sites and businesses, breaking businesses down into categories for wildlife guides; holidays with wildlife as the principal focus; boats taking visitors to view wildlife and wildlife centres.

2.3 VISITOR ATTRACTION MONITOR

There is no specific category for environmental attractions in the VAM. However, attractions based on the environment form part of a number of categories. Of the 15 categories, three are specifically based on the natural heritage: 'country parks', 'gardens', and 'wildlife, zoos, safari parks and farms'. Three other categories have large proportions of natural heritage attractions within them. 'Pleasure cruises and boat trips' are predominantly based on scenic attractions, 'interpretation and visitor centres' have 38 out of the sample of 115 based on the natural environment and the category 'other' includes many important environmental sites such as St Abbs Head, Glentworth Forest, Sands of Forvie NNR and Torridon Countryside Centre. It is estimated that out of a total of 734 attractions included in the 1999 VAM, 229 (31%) were based on natural heritage and 171 (23%) on the built heritage.

There is a great deal of overlap amongst categories, in particular heritage attractions where historic houses, castles, gardens and

country parks include a rich mixture of natural and man-made attributes. Categorisation at times seems arbitrary. The category 'historic heritage sites' is made up of archaeological sites, mostly located in remote rural settings.

38% of attractions surveyed in the VAM are owned by conservation bodies or trusts, 21% by local authorities and 5% by other government departments. Of all visitor attractions surveyed, 43% were free entry. Visitor attractions have a mix of objectives including entertainment, revenue generation, providing a service for local people and heritage conservation. An accurate measure of the proportions of natural heritage attractions, the number of visitors they attract or the revenue they generate is very difficult using the current VAM system. There is also no indication of the proportions of staying tourists, day visitors and local users, which would be necessary to gauge the level of economic impact.

3. MARKET TRENDS

This section gauges the importance of tourism to the Scottish economy, and of the environment to Scottish tourism. The data is provided by the Scottish Tourist Board, based on the following sources: International passenger survey; United Kingdom tourism survey; accommodation occupancy studies; UK day visits survey; visitor attraction monitor; overseas leisure visitor survey; census of employment and the tourism attitudes survey, 1999.

3.1 VOLUME AND VALUE

In Scotland in 1999, nearly 12.5 million tourists took overnight trips and spent just over £2.5 billion, supporting around eight per cent of all employment. Within the UK, the main markets are Scotland itself, the North and the South of England. Outwith the UK, the United States of America, Germany, and France are the key target markets.

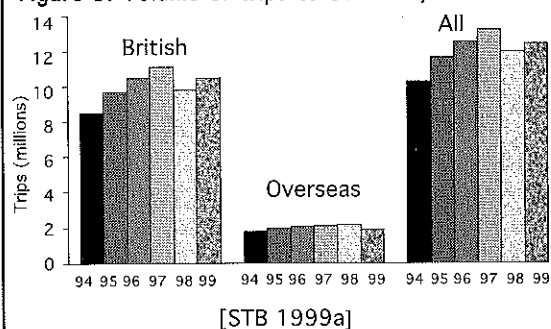
Figure 2: Volume and Value of Tourism in Scotland, 1999

	Trips (millions)	Nights (millions)	Spend (£millions)
Scotland	5.2	18.6	412
England	5.0	26.2	1,176
Wales & N.Ireland	0.3	1.5	77
Total UK	10.5	46.2	1,667
Total Overseas	1.91	18.0	845
TOTAL*	12.41	64.2	2,512

* Provisional estimates which include figures for visitors from Ireland

[STB, 1999a]

Figure 3: Volume of trips to Scotland, 1994-1999



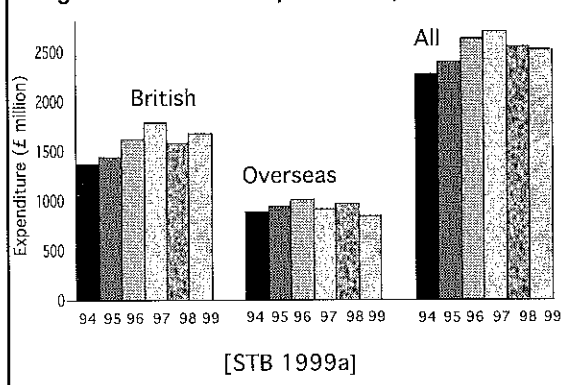
[STB 1999a]

3.2 TRENDS OVER LAST TEN YEARS

The recent downturn in visitors has not been evenly spread throughout Scotland. It seems the largest declines have been in more remote, rural areas whilst visitor numbers to the cities have been static or rising slightly. Areas north of Perth, excepting the islands, have experienced the largest recent decline.

These trends are supported by the figures for visitor attractions which indicate an overall drop of eight per cent between August 1999 and August 2000. There is no clear picture in the trends for different attraction categories. However, it seems that the attractions dependant on tourists (distilleries, historic heritage sites and historic houses) are experiencing greater declines than those that rely more on day visitors and local usage (museums and art galleries, country parks). The category 'wildlife, zoo, safari park, farm' experienced a ten per cent decrease in visitors, indicating a general decline in visitors to organised wildlife based attractions.

Figure 4: Tourist Expenditure, 1994-1999

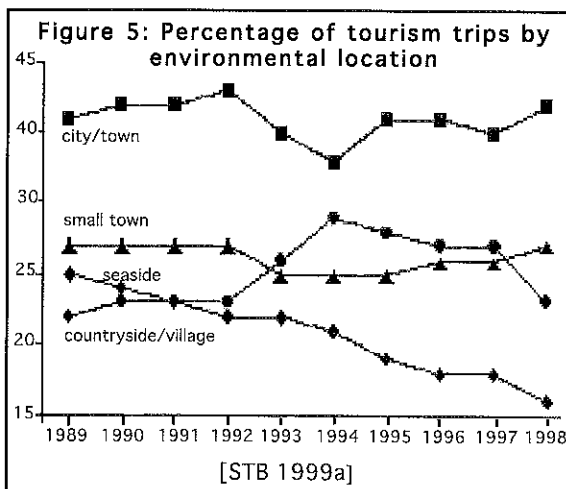


[STB 1999a]

The reasons for this decline over the last four years are a matter of debate. External factors, in particular the strength of the pound relative to the euro, have made Scotland less attractive to overseas visitors and Europe more attractive for British holiday-makers. Other factors include the weather, fuel costs, and increased competition. Around 50% of the UK stock of visitor attractions has opened since 1980, fuelled by funding from Europe (ERDF) and the National Lottery. Demand projections are often over optimistic and additional visitors are simply displaced from established attractions (STB 1999).

3.3 GEOGRAPHICAL DISTRIBUTION

In 1998, an estimated 177,620 people in Scotland were employed in tourism-related industries. The trends in tourism-related employment from 1996 to 1998 indicate a decline in some more rural areas (Aberdeen and Grampian, Argyll, the Isles, Loch Lomond, Stirling and the Trossachs, Scottish Borders) and small rises in the urban centres (Edinburgh and the Lothians, Greater Glasgow and the Clyde valley). This supports the findings for the rural/urban split in trends in visitor numbers over this period. However dependence on tourism is much higher in rural areas with a greater proportion of tourism related employment (Highlands 13.4%, Perthshire 12.9%) than the cities (Edinburgh 8%, Glasgow 7%). The areas most dependent on tourism seem to be experiencing the greatest downturns.



The trends shown in the graph (figure 5) support these findings. Although these figures do not account for day visitors or local usage of countryside facilities, it is still clear that between 1989 and 1998, the key market for UK tourism trips was large cities and towns, attracting over one third of all trips (37%).

Figure 7: Activities and sports undertaken by overseas and British tourists in Scotland

Activities	Overseas tourists % holiday trips, 1.19m (1996)	British tourists % holiday trips, 6.1m (1999)
Visiting castles, monuments, churches, etc.	83	26
Visiting museums, art galleries, heritage centres, etc.	58	14
Watching performing arts (theatre, concert, opera, ballet)	16	8
Field/nature study	9	5
Sport		
Hiking, walking, rambling, orienteeing	39	23
Swimming	5	16
Golf	2	3
Watching any sport	2	5
Fishing	1	5
Any 'activity' undertaken	85	61

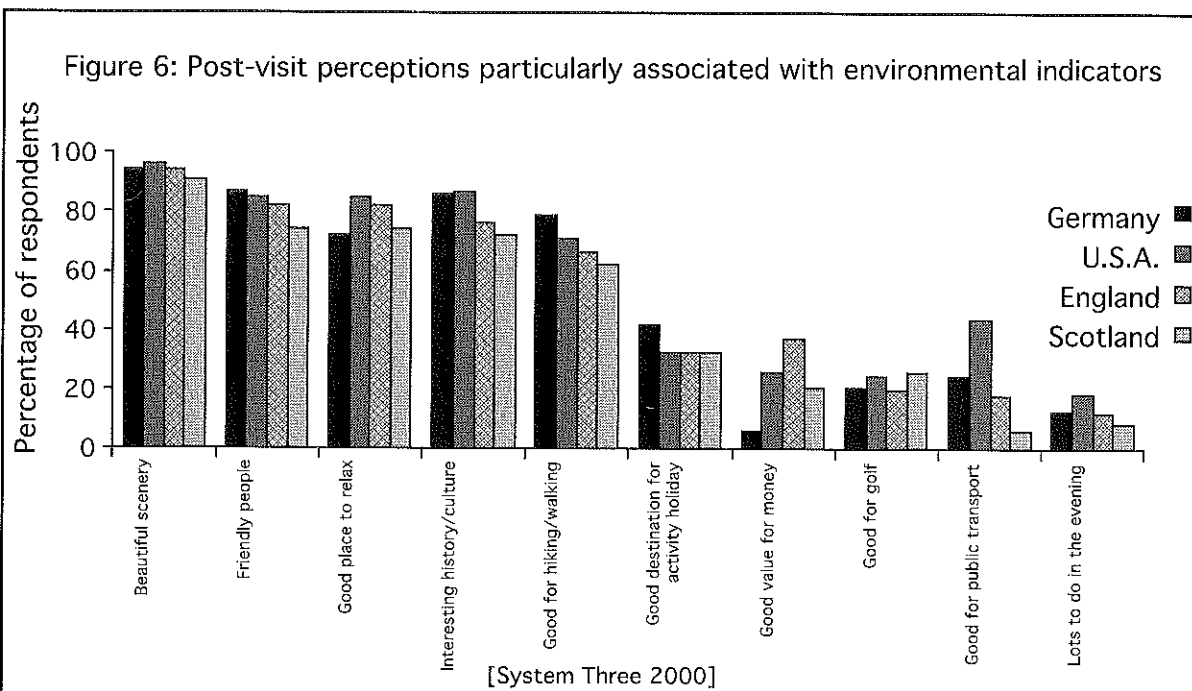
[STB 1999a]

3.4 ATTITUDES, PERCEPTIONS & MOTIVATIONS

The pre-visit perceptions of Scotland as having a quality environment are confirmed by post-visit descriptions (see figure 6 below). Although there is some variation in attitudes by country of origin, the vast majority give high scores to environmental indicators — 'beautiful scenery', 'good place to relax', 'interesting history/culture', 'good for hiking/walking'. Low scores were allocated to 'value for money', 'public transport' and 'things to do in the evening'.

3.5 SPECIFIC ACTIVITIES

Overseas tourists are more likely to undertake activities than British tourists in Scotland. Both groups are more likely to visit built heritage attractions than take part in physical or sporting activities, (see figure 7 above). This suggests that visitors are attracted by images of the Scottish



countryside but are not necessarily interested in undertaking specific outdoor activities. This is confirmed by a study (Macpherson Research, 1996) with a narrower focus, confining the survey to Europeans who were already visiting upland parts of Scotland. The main attraction was the vast stretches of wild, open scenery and rugged landscapes but although most visitors were active in the outdoors, only 6.5% claimed that outdoor activities were the main purpose of the visit. Most visitors come with broad holiday intentions and get drawn into using the countryside as a natural consequence of being here, rather than as the prime reason for coming.

This does not diminish the importance of having opportunities for outdoor activities and the right facilities. The most common activity of the European tourists sampled was walking (86%), followed by climbing a hill or mountain (40%), wildlife watching (38%) and cycling (18%).

3.6 LEISURE & RECREATION TRENDS

Broader leisure and recreation studies include day visitors and local users in addition to tourists. Although their *per capita* economic impact is less significant they would still have a physical impact that requires management (see section 4.1).

In a review of informal outdoor recreation in the Scottish countryside, Hunt (2000) notes that tourists made up only a small component of participants in outdoor activities in Scotland and estimates that activity holidays represent only five *per cent* of all countryside participation. Day visits to the countryside are of the greatest

importance, with most Scots taking three and a half days a month, half of which are to the seaside or country. Outdoor activity participation rates are increasing by three or four *per cent* per year, although the proportion going to the countryside is rising only slowly. Walking is the most popular outdoor activity (24%) and the fastest growing, with the widest appeal across Scottish society (Scottish Sports Council, 1998). Other, more active pursuits have a small but secure niche, and appeal to those in younger and higher income groups. Those who do go to the countryside are mostly satisfied with the provision. However, the requirement for specific infrastructure to support outdoor activities very much depends on the user group. For example, in a survey of walkers in Scotland (System Three, 1998), casual, low level walkers prefer to have more paths, signs and trails, whereas serious mountaineers and hill walkers felt that non-natural infrastructure is inappropriate.

3.7 NICHE MARKETS FOR THE FUTURE

There are no clear figures from Scotland-wide surveys on how much tourism is attributable to the natural environment, how much is spent directly on/in natural environmental attractions and how much goes back into the conservation and enhancement of the natural environment. The broad indications do, however, assist in the identification of growth markets and niche opportunities. A number of niche areas with prospects for further development have been identified, (see figure 8). The prominence given to growth areas that rely on the quality or unique characteristics of the Scottish natural environment points to the value of these assets to the future development of tourism in Scotland. Half of the top categories, 'excellent' and 'very good prospects' (golf, walking, wildlife, cycling) fundamentally rely on natural environmental resources. Their growth must be managed with the protection of these resources as a top priority (see section 5).

Figure 8: Niche Opportunities for tourism businesses in Scotland

Excellent Prospects:

City breaks	£820m; expected growth of 20%
Golf	£100m of expenditure; unique competitive advantage/new strategy
Walking	£438m of expenditure; likely to remain strong

Very Good Prospects:

Culture	£36m of expenditure; growing interest
Wildlife	£57m of expenditure; moderate growth predicted
Cycling	£73m of expenditure; strong growth
Genealogy	28m Scots worldwide; growing interest/unique advantage
Food and Drink	£417m of tourism spending; growing interest

Good Prospects:

Field Sports	£53m of expenditure; moderate growth, fishing on decline
Gardens	2.2 m visits; growing interest
English as a Foreign Language	£55m of expenditure; static market
Sailing (yachts/dinghies)	£10m of expenditure; growth moderate
Cruising (boat/liner)	£12m of expenditure; moderate growth but risk of over-capacity
Skiing	£18m of expenditure; poor future prospects
Archaeology	no accurate figures but relatively small; strong regional niche

[STB 2000b]

4. IMPACT ANALYSIS

4.1 MEASURING COSTS & BENEFITS

Tourism impacts arise through the construction and operation of tourist facilities or services and from the activities of tourists themselves. They can be short or long-term, localised or national, positive or negative, direct, indirect or induced. They are often divided into economic, socio-cultural and ecological impacts with the first usually categorised under benefits, the second and third as costs. The complexity and diversity in the range and type of impact reflects the characteristics of tourism and makes accurate evaluation of impacts problematic and there is a tendency to examine impacts separately. Tourist authorities tend to focus on economic impacts

through visitor expenditure, usually at national scale. Countryside conservation authorities and land managers tend to focus on physical environmental impacts in terms of damage and disturbance. However they cannot distinguish local users from day-trip, recreational users or staying tourists from day visitors. Each may have the same level of physical impact on a footpath but would have widely differing effects on the local economy. An additional complication is the difficulty in establishing where to draw the boundary in tourism impact studies. The total impact of a tourist should include the journey to the destination in addition to effects on the destination itself. This involves economic impacts (spending *en route*) and environmental impacts (transport pollution) but is seldom included in tourism impact analysis.

Although there have been a number of detailed case studies investigating the impacts of tourism in Scotland, they tend to focus on a particular sector, activity or location and seldom take a holistic view of impacts. Development agencies concentrate on measuring economic impacts, conservation agencies on ecological impacts. The case study on wildlife tourism (section 4.4) is useful but the findings cannot be applied to Scottish tourism in general. Nor is it possible to make direct comparisons between benefits (economic) and costs (environmental) with any degree of accuracy. An attempt at a holistic review of the interaction between tourism and the environment in Scotland was carried out, (PIEDA, 1991; Scottish Tourism Coordinating Group, 1992), and a tourism/environment balance sheet summarised the benefits of tourism in Scotland.

4.2 IMPACT ON THE ENVIRONMENT

A full treatment of the total impact of tourism on the environment of Scotland would require the inclusion of data on all facilities and infrastructure used; in particular, transport and accommodation, in terms of energy consumption, waste management and pollution of air, water and soil. Macro-scale data at national level, separating tourism impacts from other variables, are not currently available. A recent review of transport, tourism and the environment in Scotland (Scottish Natural Heritage, 2001), has, however, identified key tourism transport issues. In Scotland the key impact is through use of the private car, not air travel, and the impacts can be categorised in five ways: air pollution; visual pollution; noise pollution; accidents and the fear/risk of accidents; and congestion. Improved public transport has a potentially crucial role in reducing environmental impacts from leisure travel and is viewed as a way of attracting more 'deep-green' visitors. This would require local authorities, transport operators and attraction managers to work in close partnership.

Environmental costs and perceived problems

caused by tourism (disbenefits) are estimated in one study, (Scottish Tourism Coordinating Group, 1992), although focused primarily on the destination. The main issues clearly relate to visitor management, notably where the volume of visitors exceeds the carrying capacity of specific locations. Footpath damage; the impact of caravans; development of ski areas; intrusive activities such as water skiing and mountain biking and wider environmental disturbances were the key issues identified in the consultation process.

The greatest concern is over the impact of tourism and day visitors on the countryside in areas accessible to Scotland's population concentrations. Where tourism is shown to have an influence on ecological change, it is confined to specific areas, is not severe and appears to be manageable. Although wider environmental changes are taking place in Scotland, they are largely as a result of activities other than tourism and recreation.

We note that according to the balance of evidence we received, compared to other activities, leisure and tourism do not cause significant widespread ecological damage to the countryside. However there is no need for complacency. We believe that there are important issues to address, involving transport, rural culture, and leisure management, as well as local conflicts in specific areas. (House of Commons Environment Committee, 1995:xxvii).

The benefits brought by tourists outweigh the adverse physical impacts and there is no question of discouraging further tourism development. Management actions could mitigate physical impact problems to ensure that Scotland's environment remains as a sustainable tourism resource.

More rigorous research reviews of the effects of tourism and recreation on the environment, (Sidaway 2000; 1998; 1995; 1994), point to the lack of systematic evaluation of impacts. This may be because the environmental impacts of recreation are complex, both short and long-term, and research tends to be limited to particular habitats or species. Tourism and recreation can have positive, as well as negative, effects on the environment however, such as a contribution to environmental preservation from visitor revenues. Harmful effects tend to be localised, requiring management solutions specific to the local situation. Tensions arise where recreation interests tend to stress the national while conservation interests focus on the local effects. An apparent lack of impact at the national level may hide potentially serious problems at local level. Where activities are coupled with the development of facilities, construction can lead to loss of habitats. Management techniques must evolve with the rapid development of new technologies and potentially damaging activities, such as off-road driving. Cumulative changes in environmental

quality result from small scale incremental effects, and associated visual and social impacts give an impression of an eroded countryside. There is a need for much closer links between researchers and practitioners and a thorough examination of current management practices. Attempts at detailed monitoring and evaluation of environmental impacts of tourism have been thwarted through a lack of expertise and resources to follow through recommendations. This was the case with the report on the Trossachs Tourism Management Programme, which advocated an environmental monitoring scheme using a comprehensive, detailed measurement of the impacts of recreation on the area (Dargie *et al.*, 1994). A deficiency in hard information has led to an inability to have clear decision making and effective management. This in turn has resulted in unnecessary polarisation of views between the recreation and conservation lobbies. A pragmatic approach would be to identify the critical habitats most vulnerable and liable to recreation demands and look to collective management involving researchers, managers and user groups. The issue to be addressed is:

How do we manage recreation to ensure that wildlife interests of areas, that is important both to recreation and conservation, is maintained and enhanced? (Sidaway 2000:10).

4.3 ECONOMIC IMPACT OF ENVIRONMENTAL TOURISM

The difficulty in separating environmental based tourism income from all tourism income has already been discussed. There has been no comprehensive research making this distinction on a Scotland-wide basis. Mackay Consultants (1997) provide one approximation, although this uses a very broad interpretation of terms. The total expenditure on wildlife and environmental tourism was estimated to be £105 million, or three *per cent* of the total tourism revenue in Scotland. (Masters *et al.*, 1998). There have been a number of more rigorous studies looking at the economic impact of various tourist activities relying on the environment that have more moderate estimates (figure 9).

Surrey Research Group (1993) found that the rates of leakage are greater from rural areas and that greater tourist spending is required to produce an FTE job in large hotels compared to bed and breakfasts. Variations in multiplier values depending on rural accommodation type are confirmed in a study by Slee *et al.*, (1997). These studies reveal that there are marked differences within regions with respect to the effects of visitor spending. The higher levels of spending in large hotels, with their close connections to national suppliers, drain out of the region, whilst the spending in smaller establishments tends to circulate in the local

Figure 9: Economic impact studies of wildlife tourism

Study	Key findings
Morrison (1995)	Wildlife watching boat trips in The Minch generated direct income of £445,000 in 1994, supporting 29 full-time and 17 part-time jobs.
Arnold (1997)	In 1993, the potential revenue from dolphin adoptee holiday makers in the Moray Firth was calculated at £1.4m (n.b. this scheme has increased to £7.4m as more people have joined the scheme)
Crabtree <i>et al.</i> , (1994)	Site-based wildlife tourism revenue in Wester Ross, Orkney and Highland Perthshire was estimated at £5.15m in 1993, supporting 351 full-time equivalent (FTE) jobs
Rayment (1995)	26% of the total tourism expenditure in the Shetland Isles in 1994 came from bird watchers (£1.07m), supporting 43 FTE jobs
Mackay Consultants (1989)	Tourists 'with an interest in wildlife' generated £3.1m expenditure on Islay and Jura in 1989, supporting 152 FTE jobs.
Surrey Research Group (1993)	Tourism multipliers vary considerably in Scotland, ranging from one FTE per £19,000 -£28,000 per visitor spend
A & M Training & Development (1997)	In terms of income generation wildlife tourism in Scotland is worth £11m (STB) and supports 1,500 FTE jobs.
[Masters <i>et al.</i> , 1998]	

economy, thus generating additional beneficial effects in the process.

Slee (1998) points to the proliferation of studies looking at economic impact of various tourist and recreational activities in rural Scotland: sports shooting (McGilvray, 1990) salmon fishing (Mackay Consultants, 1989), hill-walking (Highlands and Islands Enterprise, 1996) and general access-related recreation (Crabtree *et al.*, 1992). The link between the value of nature conservation designations and income and employment generation in Scotland has been demonstrated, based on Natura 2000 sites and RSPB reserves (Broom *et al.*, 1999; Rayment, 1995). Although the estimates are for all jobs generated through activities related to the protection of the environment, this includes those related to nature based tourism.

Estimations of the economic value of a wider range of activities is provided on the web at www.scotexchange.net (Scottish Tourist Board, 2000b). Market information is given for industry benchmarking and for potential investors. These may be valuations on new niche growth markets or for established markets. Valuations of a selection of activities are summarised in figure 10.

Unfortunately there is no uniform basis for collecting data. The estimates are derived from a variety of sources based on surveys using differing methodologies over different time periods. This makes direct comparisons difficult. The figures do, however, provide a clear indication of the importance of certain activities which are based on the natural environment, in particular to the economy of more northerly, rural parts of Scotland. For instance, one survey estimated that 767,000 hill walkers over a twelve-month period visited the Highlands, incurring direct expenditure totalling £157.9m. This level of expenditure was estimated to generate an

income of £53m for the area and support approximately 6,100 FTE jobs. (Highlands and Islands Enterprise, 1996).

Figure 10: Economic impact of selected activities

Activity	Economic Impact
Golf	Golf is estimated to be worth almost £100m to the Scottish economy, £70m of expenditure from UK visitors & £28m from overseas golfers.
Walking	In 1998 walking was estimated to generate 1.1m trips to Scotland, during which visitors stayed for 9.6m nights and spent over £438m.
Garden Tourism	The 59 garden attractions in Scotland attract around 2.2m visits a year.
Field Sports	110,000 visitors fish in Scotland every year, generating just under £30m worth of spending. Around 100,000 trips to Scotland are made each year to shoot and spending totals £23m. Angling holidays generate £12m expenditure and 400,000 bed nights annually for Tayside alone.
Skiing	Specific skiing holidays generate 100,000 trips to Scotland, 300,000 bed nights and around £15m expenditure. An additional £18m is generated by 100,000 trips by people on general holidays that spend 400,000 bed nights of their time at a ski area.
Cycling	Cycling holidays by UK residents accounted for 750,000 trips to Scotland in 1998. Cycling tourism in Scotland has grown by almost 50% since 1994. They stay an average of 7 nights and spend £48m in Scotland each year.

[STB 2000b]

4.4. CASE STUDY: WILDLIFE TOURISM

The wildlife tourism sector is still relatively immature and is experiencing difficulties in establishing markets and appropriate operating practices. A 1995 survey of businesses and organisations in the Highlands and Islands was carried out to estimate employment in the nature/landscape conservation sector. Of 1356 direct FTE jobs, 249 (18%) were in wildlife and environmental tourism, defined as marine and land-based wildlife tourism with a high input by knowledgeable guides (*i.e.* not just a tour), relevant visitor centres and wildlife parks. (Independent Northern Consultants, 1995). This compares with 171 FTE jobs in this sector for the whole of Scotland in 1991 (Sime & Crabtree, 1991). Marine wildlife tourism, defined as *any tourist activity with the primary purpose of watching, studying or enjoying marine wildlife* (Masters *et al.*, 1998:6) is estimated to be worth £9.3m in the Highlands and Islands area alone.

The economic rationale for the development of wildlife tourism in certain parts of Scotland is clear. Crabtree *et al.*, (1994:61) recognise that wildlife may be valued *in terms of the benefits that the presence of wildlife, in addition to any associated conservation and utilisation activities, may confer on the economy of the surrounding area.* These benefits are of particular significance in remote and undiversified economies where the wildlife resource can generate a significant contribution to local income and employment, (see figure 11).

A number of studies have been carried out on the economic effects of environmental agencies in the countryside. Rayment's studies (1995;1999) highlighted the local economic impact of the RSPB's Abernethy Forest Reserve. The reserve

Figure 11: Expenditure and employment effects of wildlife site-related visitor spending

	Orkney	W. Ross	Highland Perthshire
Visitor expenditure (£m)	1.78	0.67	2.79
Visitor expenditure/FTE (£)	18,000	14,300	18,100
Direct employment (FTEs)	99	47	154
Indirect & induced expenditure (£m)	0.43	0.12	0.95
Indirect & induced expenditure/FTE (£)	29,000	28,000	30,000
Indirect & induced employment (FTEs)	15	4	32
Total FTE jobs supported (FTEs)	114	51	186

[Crabtree *et al.*, 1994]

supports 87 full time equivalent jobs in the local economy, and attributable visitor expenditure totalled £1.7m per year. In contrast, the estate had one full-time employee only when it was managed for sporting purposes alone.

The supply of wildlife tourism products

The recognition of the growth and importance of this sector, in particular to remote areas, led to a major review of wildlife tourism by the Tourism and Environment Task Force, (A & M Training & Development, 1997). The key purpose was to gauge the current extent and nature of wildlife tourism in Scotland in order to produce strategies to improve existing provision and to capitalise upon potential development, within the bounds of sustainable practice. It covered all aspects of wildlife tourism from its infrastructure to any businesses concerned with the wildlife of Scotland, whether as their primary or secondary product. Three main types of wildlife tourism were examined; businesses whose main purpose is to provide a wildlife experience to visitors; businesses which include wildlife viewing as part of a more general experience; and sites which provide specialist facilities for wildlife viewing. The wildlife holiday sector is heavily dependant on the organisations owning or controlling the resource, and the continued expansion of the market has to be closely linked to sites/reserves and their access. The supply of wildlife tourism products was seen as very limited in most parts of Scotland, with only Argyll and the Islands judged to have a well developed product. There is some capacity to expand wildlife tourism, particularly in each of the primary markets, and especially in Germany and the USA.

Demand characteristics for wildlife holidays

The wildlife tourist market is relatively diverse and fragmented but for analysis was categorised into five types according to expectations and a judgement was made on the extent of provision for each market (see figure 12 on next page).

A potential progression from group 1 to group 5 was identified with the aim to develop repeat business through generating a greater intensity of interest in wildlife viewing. It seems that the basic Scottish wildlife tourism product is of *world-class quality* (Dennis, 1997) and that international tourism trends indicate a growing

Figure 12: Extent of provision for the wildlife market

Market	Provision
1. Impulse wildlife trips	Substantial provision
2. The holistic, packaged experience of Scotland that includes wildlife.	Scope for development of holistic, packaged experience targeted particularly at Americans over 55
3. The independent holiday focused on Scotland's remote places	Inadequate information available on wildlife tourism products
4. Activity holiday maker with wildlife interests	Generally good provision; scope for incorporation of wildlife viewing
5. Dedicated wildlife enthusiasts (e.g. RSPB, SWT members)	Good provision — members with access to Reserves

[A & M Training and Development, 1997]

market for these products. The key issue is how to manage, coordinate and market effectively and sustainably.

Management Issues

The key management concern for the wildlife tourism sector is how to strike a proper balance between development and conservation. At a practical level the debate has concentrated on the adoption of voluntary codes of conduct for visitors and codes of practice for operators. There is little evidence that sites and businesses have developed and applied codes effectively although there are some exceptions, such as the dolphin watching code of conduct in the Moray Firth. The lack of controls on entry to the wildlife tourism sector by private businesses means that many operate in direct competition. Without the required knowledge of wildlife, interpretation or visitor management, attracting more visitors and hence more revenue becomes the primary imperative. The challenge is to implement more stringent regulations on operators without stifling their ability to stay in business. The current institutional policy framework, with the economic development agencies and the conservation agencies pursuing conflicting agendas is not conducive to achieving this. There are some examples of good practice and cooperation such as the Scottish Marine Wildlife Operators Association. This organisation aims to combine marketing, interpretation and improved guiding to enhance visitor experience and will result in a more sustainable sector.

4.5 CASE STUDY: HEART OF NEOLITHIC ORKNEY

This example illustrates how cultural and natural environments are often integrated into a common landscape, combining as attractions for visitors and as corner stones for tourism development strategies, attracting visitors to peripheral areas and in turn sharing common visitor management problems. It, moreover, provides an example of effective multiple agency partnership.

The Orkney Tourist Board commissioned a 1996 survey of over 2,000 visitors. 23% of those

visited Orkney because of its archaeological attractions, and 73% undertook some sort of archaeological visit during their stay (System Three 1997). The total tourism spend in 1996 was £16m (Orkney Islands Council, 1998) making tourism Orkney's dominant industry by value. The annual value of its archaeology is between £4m and £12m, depending on the degree of accepted causality. These figures catalysed a series of developments.

A UNESCO World Heritage designation was awarded in 1999, which led to a joint Statement of Intent on the preservation and enhancement of the areas' monuments and landscapes, co-signed by Historic Scotland, Scottish Natural Heritage, Orkney Islands Council and Orkney Archaeological Trust. The nomination was defined as *The Heart of Neolithic Orkney* (Historic Scotland, 2000).

The nominated sites of Skara Brae, Maeshowe, the Stones of Stenness and the Ring of Brodgar are included. The first two sites received nearly 80,000 paying visitors in 1999, while the latter pair have free access. Developments have included an expansion of the visitor facilities at Skara Brae. A typical visitor management dilemma centred on striking a balance between the need to encourage and manage higher numbers of visitors, improve physical access, and the necessity to protect the monument. Pressure on the existing structures was relieved with a replica construction, based on one of the original house designs, but subtly updated to conform to modern visitor requirements and Health and Safety regulations.

5. MANAGEMENT & PROTECTION

Planning and management techniques, carefully applied at the appropriate scale, mean that a balance may be achieved between tourism development and environmental conservation. Tourism should be based on the criteria of sustainability: it should be ecologically bearable, economically viable and ethically and socially equitable for local communities. Sustainable tourism should ideally contribute to sustainable development and be integrated with all aspects of environment, respecting fragile areas and being careful that impacts do not exceed the capacity of those areas. Achieving this in reality presents organisational problems at the national scale and practical implementation problems at the local level.

The maintenance and enhancement of the natural environment resource should lie near the heart of any strategy for the Scottish tourism industry and this has been recognised and agreed in theory by tourism agencies and industry leaders. But practical implementation policies to achieve this have not yet been clarified. Difficult questions are raised such as how to balance the

interests of those in control of this environment, mostly private landowners, with those of the tourists and those who depend on them, such as hoteliers, retail outlets and tour operators. The organisation of coherent policies is hindered by the fragmented nature of tourism related businesses in Scotland.

In terms of public policy, some progress has been made in clarifying issues of access to the countryside and the establishment of national parks should eventually help to plan and implement an improved balance between conservation and development objectives. However, the question of who should pay for countryside maintenance has yet to be resolved. Since no way of charging for scenery has been devised (outside of US style national parks) a combination of balancing land management regulations, visitor management and promotions and taxation/subsidisation is the only way to proceed. As tourism depends on a mixture of private and public provision of attractions and facilities, private landowners, conservation organisations and local authorities question whether those who come and enjoy these features are contributing their proper share to the costs involved.

Recent access laws, agri-environmental measures and forestry practices have moved towards more visitor-friendly policies. The other side of environmental economics relevant to tourism concerns damage to the environment through tourism activities. Although much can be done to encourage responsible visitor behaviour through education and interpretation, costs will inevitably be incurred. Footpath maintenance on private land, responsibility for clearing litter and restoring vegetation damaged by large numbers of visitors raises questions of finding methods for footing the bill through public sector involvement.

The influence of tourism on these problems is often exaggerated and a lack of clear, measurable indicators of change hinders rational remedial action. The connections between tourism and the environment are acknowledged by policy-makers but only in a general sense. The evidence presented in this Audit indicates a clear lack of accurate hard data on how this interaction works. There is both insufficient measurement and monitoring of the costs, and benefits, of tourism to the natural environment to allow managers on the ground to make rational decisions. Where there is a clearer relationship, as in the case of many of the wildlife tourism operations, the management debate has focused on how to enforce controls. Alternatives, such as enforcing regulations through an official body, have been resisted by operators who advocate voluntary arrangements. However evidence suggests this does not provide adequate safeguards on the protection of the wildlife resources themselves. A compromise proposal is for the operators to

develop self-regulatory agreements, linked to membership schemes with both benefits and penalties. Organising and implementing this kind of arrangement has been problematic given the fragmented nature of the sector.

At the level of public policy making, there is also a lack of coordination and conflicting objectives between agencies concerned with tourism and environment-related matters. Although they share the same general sustainable development aims, they have different agendas and priorities. This inevitably poses a constraint on the implementation of policies working towards the sustainable development of tourism. At an individual project or site level this often results in a classic conflict between the priorities of economic development and environmental conservation. The coordination of public agency policies has not been clarified by the Scottish Parliament where responsibility for tourism and environmental matters is spread across a range of departments. Where they do come together, such as in the Tourism and Environment Forum, the partnership lacks funding and real policy making powers.

There are positive signs of more agreement amongst decision-makers that management of tourism and the protection of the environment requires a holistic approach, involving both development and conservation interests. A variety of partnerships have been established at national and local levels to address this. A great deal of work has been done in raising the awareness of the industry and integrating environmental variables into tourism quality grading schemes, such as the Green Tourism Business Scheme.

Local sustainable tourism pilot projects set up by the Tourism and Environment Forum and its predecessor, the Tourism and Environment Task Force, have had varying degrees of success. These partnerships are still in their infancy but nevertheless demonstrate what can be achieved in balancing common goals. The development of tourism, with local economic benefits, improvements to the management of visitors and the improved well being and enjoyment of local people, can all result from enhancement to the quality of the natural surroundings. But in order to achieve this effectively it is essential that accurate data is available to monitor and measure changing patterns of usage of the countryside. More day visitor surveys, broad questioning surveys and a strategic network of people counters are required and there must be dissemination of information to a much wider audience. The shift in thinking on these issues is illustrated in recent Area Tourist Board strategies.

The Highlands of Scotland Tourism Strategy recognises the importance of the natural environment in attracting visitors but also the inherent fragility of these resources:

The challenge for the tourism industry in the Highlands will be to create tourism opportunities and eco-efficiencies through better use of our environmental resources, while effectively managing impacts on the environment brought about by tourism (HOST, 2000:30).

Recommended actions include ensuring that tourism in valued landscapes develops along sustainable principles. This involves addressing problems with litter, water and beach pollution and encouraging the development of more sustainable and tourist-friendly transport services. HOST (2000) recommends support for wildlife tourism, particularly in more remote locations, as niche products for a growing market but importantly add that they are developed in a sustainable way in recognition of the sensitivity of sites and species.

At national level, the Tourism and Environment Forum new Operational Plan (Tourism and Environment Forum, 2000) recognises that short-term practical measures are required to achieve long term sustainable objectives. The plan builds on the work of its predecessor but asks more of its public and private partners in a more action-oriented strategy. It identifies four aims to achieve the sustainable vision for Scottish tourism: deliver market research and environmental capacity information to the industry; ensure the industry adopts good environmental practices and capitalises on the advantages they bring; promote the sustainable use of key national assets; and, ensure a national and local integrated approach to tourism and environment opportunities.

A range of positive achievements by smaller scale initiatives could be added to these examples of partnerships, for example the local community purchase of the Isle of Eigg, the Moray Firth Partnership and the Hebridean Whale and Dolphin Trust. The forthcoming establishment of national parks in Scotland should present further opportunities to hone techniques to bring tourism development and the environment into a more harmonious relationship.

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SCOTLAND'S 'GREAT OUTDOORS'

KEY TO THE FUTURE OF SCOTLAND'S TOURIST INDUSTRY

The overnight closure of the countryside to visitors during the recent foot-and-mouth outbreak threw into sharp relief the importance of Scotland's environment to its tourist industry. This highlighted the need to maintain our clean, green image and to ensure a welcoming countryside for visitors.

With access restrictions over large areas of the countryside, tourism businesses felt the painful consequences as visitors, both from home and abroad, cancelled their holidays and suspended their recreational activities. There can no longer be any doubt as to the economic importance of Scotland's outdoors to its tourist industry.

SCOTLAND'S 'GREAT OUTDOORS' — THE VITAL ROLE

Scotland is famous the world over for its magnificent coastal scenery, mountains and lochs, marine and terrestrial wildlife, woodlands, archaeological and built heritage and the recreational opportunities and tranquillity these offer. Marketing these attractions without taking measures to protect them is not enough. For most tourism businesses the environment is a backdrop and they are not directly involved in rural planning and management. Unlike a turnstile attraction the environment is 'free'. It is vital that the industry becomes more directly involved in safeguarding the environment — its prime asset.

Our world-renowned landscape, wildlife and cultural heritage need better management and enhancement measures, as well as protection from small-scale changes which collectively have a detrimental impact. We also need to ensure that access to the Great Outdoors is improved. Visitors from home and abroad should be welcomed into the countryside. The challenge we now face is to ensure that the qualities and opportunities in the Scottish environment and landscape are safeguarded so that the £2.6 billion visitor spend and the 180,000 jobs tourism supports can continue to be realised.

Scottish Environment LINK¹ recently commissioned an audit of the relationship between tourism and the natural environment in Scotland². The audit provides an authoritative, independent assessment and critique of the contribution of Scotland's environment to attracting tourism revenue and the effect of tourism on that environment. An earlier audit on the historical environment³ considered its relationship to tourism.

¹ Scottish Environment LINK (LINK) comprises voluntary organisations working together to care for and improve Scotland's heritage for people and nature. LINK provides a forum for its member organisations and is sponsored by grants from WWF Scotland, Scottish Natural Heritage and the Scottish Executive, and is supported by subscriptions from member bodies, subscribers, supporters and charitable donations.

² Scottish Environment Audit Series, No 5: Tourism & the Natural Environment (No 1: The Marine Environment; No 2: Agriculture & the Environment; No 3: Planning & Sustainable Development; No 4: The Historic Environment).

³ Scottish Environment Audit Series, No 4: The Historic Environment



The tourism audit:

- > > confirms that our countryside — including its wildlife, landscape and the ability to enjoy these — is the basis for attracting its visitors, and reiterates the importance of providing visitors with opportunities for outdoor activities and associated facilities;
- > > notes that small, but important, niche markets depend on natural environmental assets, and those of the archaeological and built heritage. For example, Scotland's wildlife tourism product is of world-class quality and, importantly, is a growing market. Walking and cycling contribute £438m of expenditure and is likely to remain a strong growth area, whilst archaeology has a strong regional niche;
- > > shows how half of the top categories in VisitScotland's forecasts for growth areas in tourism fundamentally rely on natural environmental resources, as well as showing the positive link between the value of nature conservation designations and tourist income/employment generation in Scotland;
- > > notes that the influence of tourism on problems such as footpath erosion, litter etc. is often exaggerated but that a lack of clear, measurable indicators of change hinders rational, remedial action;
- > > discusses the need to manage the impact of day-visitors and local users even though they contribute less to the economy than tourists — walking, for example, is the most popular and fastest growing outdoor activity and has the widest appeal across Scottish society;
- > > notes the difficulties in assessing the *total* impact of tourism on the environment of Scotland, including transport and accommodation, energy consumption, waste management and pollution of air, water and soil. Macro-scale data at national level, separating tourism impacts from other variables, is not currently available;
- > > highlights the lack of coordination and conflicting objectives between agencies concerned with tourism and environment-related matters, making it difficult to implement policies working towards the sustainable development of tourism;
- > > concludes that the benefits brought by tourism and recreation in the outdoors *generally* outweigh any adverse physical impacts and that there need be no question of discouraging further tourism development, *provided it is appropriate, high-quality and sustainable.*

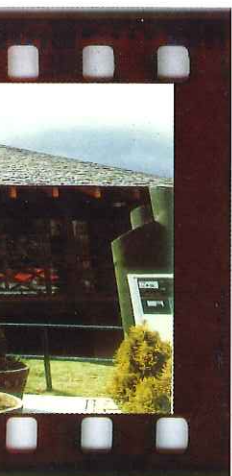


WHAT NEEDS TO BE DONE

.....

Given the dependence of our tourist industry on the environment it must play a greater role in protecting this resource. The continued development of the industry will only be assured if it is developed along truly sustainable lines, striking a proper balance between tourism development and the conservation and enhancement of its environment. LINK member bodies' recommendations are to:

- > > **elevate both tourism and the environment** to Ministerial level — both sectors require dedicated Ministerial responsibilities given their importance to the economy and quality of life in Scotland;
- > > **cut across the departmental and agency** structures that slow up the changes needed to develop sustainable strategies for the tourist industry. A clear responsibility for tourism and environment matters, linked to measurable objectives contained in the national tourism strategy, should be allocated to a Director-level post at VisitScotland. VisitScotland should also recruit more expertise in access and recreation. Scottish Natural Heritage should give more emphasis to tourism, including recruiting more tourism expertise. Historic Scotland should widen its interests in tourism beyond the current emphasis on properties in care. Tourism should be accorded more weight in the Scottish Executive Environment & Rural Affairs Department;
- > > **ensure that the national tourism strategy** sets measurable objectives which recognise the value of Scotland's environment and associated cultural heritage — its scenery, wildlife and outdoor recreation opportunities — in drawing visitors from across the world. The industry must be effectively involved in meeting these objectives, given that most tourism businesses have no direct financial stakeholding in or responsibility for the natural resource which brings customers to their door;
- > > **ensure that funding and real policy-making powers** are made available to those bodies tasked with delivering Scotland's tourism strategy;
- > > **raise awareness**, especially amongst Scottish people, of the critical role played by Scotland's environment and the opportunities it offers in providing benefits for our tourist industry;
- > > **invest** in measures to restore or enhance high-quality landscapes (for example, by implementing in full our Local Biodiversity Action Plans), as well as to ensure the provision of appropriate infrastructure to facilitate access (for example footpaths, stiles and gates) and put in place real and effective provision for information, long-term maintenance and re-investment. Opportunities for cross-compliance through existing subsidy and grant systems should be applied. Methods to adequately reimburse land managers, if genuine costs are incurred, should be made available through the rural support mechanism — positive measures such as the Rural Stewardship Scheme should be greatly expanded;
- > > **initiate action plans** for the development of niche markets, including wildlife tourism, archaeological holidays and walking, given the significant contribution these can make to local income and employment in remote and undiversified economies. The latter will require an integrated approach to providing information on access, in partnership with agencies, local authorities and voluntary bodies.



- > > **rebuild and enhance public confidence to take access** in the countryside, especially after the foot-and-mouth crisis, by ensuring the successful implementation of the government's aim to create a statutory right of access to land and water for the purpose of informal recreation (subject to safeguards for conservation and a code of responsible behaviour);
- > > **develop and improve on the research framework** for Scotland's tourism industry so that a greater range of interests contribute to the development and management of research, and to use this more effectively in managing tourism and protecting the environment;
- > > **improve on the training of tourism managers** and their staff in environmentally-friendly practices and an understanding of Scotland's landscape and environment — best practice case studies should be used to show that protection is compatible with promotion and to demonstrate the many benefits that can accrue to tourism operators in protecting the environment;
- > > **improve on the training of tourism managers and staff** in access and recreation needs, issues and the provision of information. Ensure they have effective input to local access initiatives, Access Fora, etc.;
- > > **invest in a public transport system** that serves the rural, as well as urban, communities of Scotland so as to mitigate the adverse impacts of leisure transport on the environment. This would also add to the attractiveness of Scotland to visitors.

Looking after Scotland's environment must lie at the heart of any strategy for the Scottish tourism industry if its economic potential is to continue to be fulfilled. Practical policies to deliver this must be put in place. Scottish Environment LINK member bodies call for the Scottish Parliament to coordinate public agencies and the tourism industry to achieve this as a matter of urgency.

Association for the Protection of Rural Scotland
 Association of Regional and Island Archaeologists
 Badenoch and Strathspey Conservation Group
 Butterfly Conservation
 Cairngorms Campaign
 Council for Scottish Archaeology
 Friends of Loch Lomond
 Hebridean Whale and Dolphin Trust
 Marine Conservation Society
 Mountaineering Council for Scotland
 The National Trust for Scotland
 North East Mountain Trust
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