



INTRODUCTION

In 2007 Fáilte Ireland undertook significant research on visitor attitudes to wind farms in Ireland. In the intervening period well over one hundred wind farms have been constructed in Ireland. As a result there has been a need to update this research to determine if there has been any significant change in visitor attitudes to wind farms in Ireland. The research was therefore updated in 2012 and this paper outlines the findings of the research together with a comparison to the 2007 results.

The Issue

The first wind farm in Ireland was completed in 1992 at Bellacorrick, Co. Mayo and since then wind farms have elicited a range of reactions from Irish people. Thus in 2002, Sustainable Energy Ireland [now the Sustainable Energy Authority of Ireland (SEAI)] commissioned a survey aimed at identifying public attitudes to renewable energy, including wind energy in Ireland¹. The 2002 survey found that, in general, Irish people are positively disposed towards the development of wind farms. However, the survey also indicated that people will not accept wind farms everywhere and that special care should be taken to ensure that wind farms respond to contextual landscape characteristics.

Ireland's scenery has been a cornerstone of international tourism marketing campaigns for decades. In 2012, 91% of overseas holidaymakers to Ireland rated scenery as an important part of a destination with natural/unspoilt environment also rated highly at 91%. The future sustainability of Ireland's tourism industry is, therefore, inextricably linked to the maintenance of the character and scenic qualities of the Irish landscape.

If Ireland is to achieve the ambitious EU targets of reduction in Greenhouse Gas (GHG) emissions by 20% by 2020 (relative to 2005), as well as a target of renewables to account for 16% of overall energy consumption by 2020, then an increase in the number and distribution of wind farms is inevitable. However, to date, wind farms tend to be located in upland areas and areas close to the coast where the wind speeds are greatest and these areas also contain some of our most valuable scenic landscapes. Therefore in response to the potential conflict that could arise from this confluence of scenic landscapes and opportunity areas for wind farms, Fáilte Ireland, in association with the Northern Ireland Tourist Board (NITB) decided in 2007 to survey both domestic and overseas holidaymakers to Ireland to determine their attitudes to wind farms. The survey drew on many aspects of the original SEI survey including the photomontages of wind farms, and in particular the landscape types that were used to elicit a reaction from respondents. The purpose of the survey was to assess whether or not the development of wind farms would impact on the visitors' enjoyment of Irish scenery.

In 2012 this research² was updated by Millward Browne Landsdowne on behalf of Fáilte Ireland in order to determine if there was any change in visitor attitudes during this period. Again in 2012 the surveys were undertaken with holidaymakers at various tourist offices and visitor attractions around the country and a similar size and mix of domestic and overseas visitors was included.

¹ The results of this survey can be obtained directly from the Sustainable Energy Authority of Ireland
² The surveys were undertaken at the same time of year however the demographic was slightly older in 2012 with an increase in the 55+ age group, was more male orientated and had fewer visitors from Great Britain. Also there was a slight increase in the number of people on city/ urban based holidays with fewer countryside holidays.



What our visitors think³

Awareness

As in 2007, awareness of wind farms in 2012 is very high amongst visitors to Ireland, with over 95% of visitors claiming to have seen a wind farm before. 2012 also saw an increase in the number of tourists (56%) that have seen a wind farm whilst on holiday in Ireland, up from 49% in 2007. There has also been an increase in the number of wind farms seen by visitors as part of their holiday however the vast majority still see one (41%) or two (23%) wind farms.

The 2007 research found that the majority of visitors felt that wind farms had either no impact (49%) or a positive impact (32%) on the landscape, whilst 17% felt it had a negative impact. The 2012 research indicated an increase in the polarisation of opinion – with increased positive (47%) and negative responses (30%) and less neutral responses (23%). It is notable that those interviewed who did not see a wind farm during their trip held more negative perceptions and opinions on wind farms to those that did.

In 2012, as in 2007, most wind farms were seen by visitors from their car (84%) or whilst walking or cycling (6%) or other (6%), whilst few viewed a wind farm from their accommodation (2%). Over half of those who had seen a wind farm on their visit tend to see them on the horizon (52%) rather than in close proximity, although there was an increase in sightings within 1-2 km up to 39% from 26% in 2007. There was an increase in sightings in mountain moorland areas (up from 47% to 59%) with a significant reduction in sightings in coastal areas (down from 37% to 16%). Of the wind farms viewed the majority (59%) contained less than ten turbines, which was quite similar to 2007 (63%).

Perceived impact on sightseeing

Despite the fact that there has been an increase in the number of visitors who have seen at least one wind farm on their holiday, there was also a slight increase (from 45% in 2007 to 48%) in the number of visitors who felt that this had no impact on their sight-seeing experience. However fewer now say they have a positive impact (down to 32% from 40%) and there is a slight increase in negative perceptions (increased from 15% to 21%).

Importantly, and as has been seen in the previous research, the type of landscape in which a wind farm is sited can have a significant impact on attitudes. Although 21% feel that wind farms have a fairly or very negative impact on sight-seeing, this figure increases substantially for wind farms in coastal areas (36%) and is even higher from accommodation (38%).



Perceived impact on beauty

Visitors were again asked to rate the beauty of five different yet typical Irish landscapes: coastal, mountain, farmland, bogland and urban industrial land, and then rate the scenic beauty of each landscape and the potential impact of siting a wind farm in each landscape. As in 2012 the results indicate that each potential wind farm and site must be assessed on its own merits, due to the scenic value placed on certain landscapes by the visitor and the preferred scale/ number of wind turbines within a wind farm. Looking across all landscapes, wind farms are seen to have an enhancing effect on the landscapes seen as less beautiful, particularly urban/ industrial and bogland.

Coastal areas (91%) followed by mountain moorland (83%) and fertile farmland (81%) continue to be rated as the most scenic, and unsurprisingly resistance is greatest to wind farms in these areas. For instance there was a greater relative negativity expressed about potential wind farms on coastal landscapes (40%), followed by fertile farmland (37%) and mountain moorland (35%). On the other hand less than one in four were negatively disposed to the construction on bogland (24%) or urban industrial land (21%). The majority of visitors also still favour large turbines (47%) over small turbines (28%), and in smaller numbers, with the option of 5 turbines proving the most popular, followed by two clusters of 10 and finally wind farms of 25 turbines.

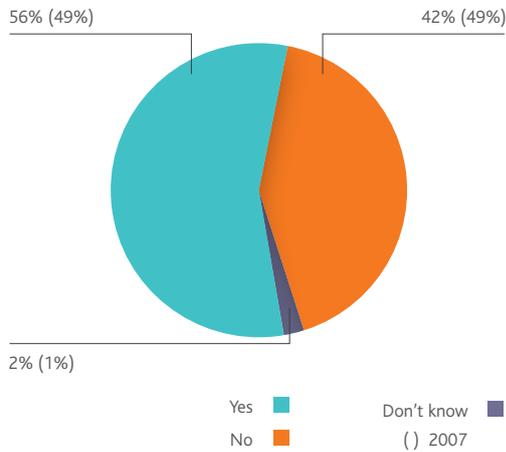
³ The 2007 survey was undertaken in both Northern Ireland and the Republic of Ireland, however the 2012 survey was undertaken in the Republic of Ireland only. For the sake of accurate comparison, the Northern Ireland cohort has been stripped out of the 2007 results.

VISITOR ATTITUDES ON THE ENVIRONMENT

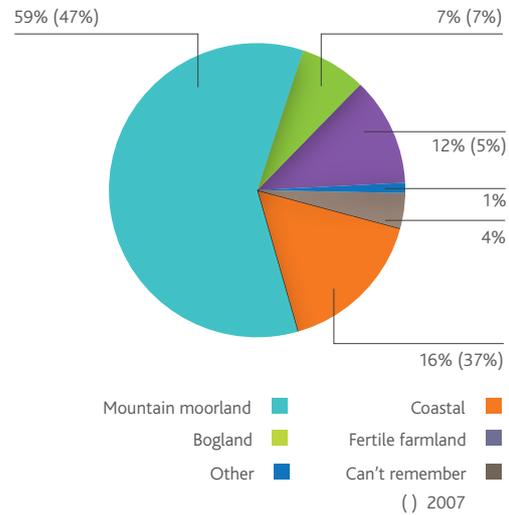
WIND FARMS

2012/ No.1 (Update on 2007 Research)

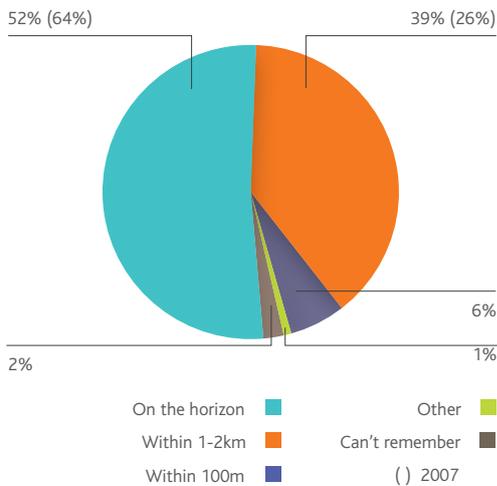
Have you seen a wind farm on this holiday?



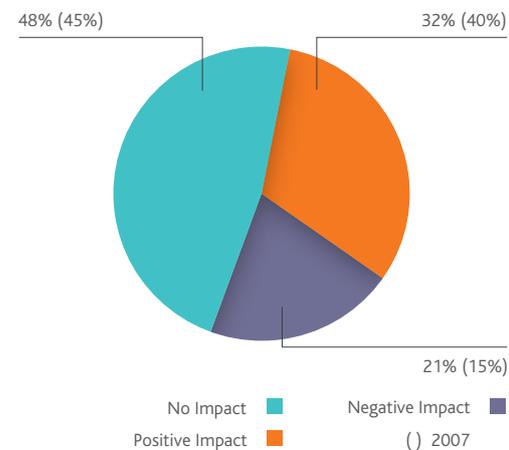
What type of landscape was the wind farm situated in?



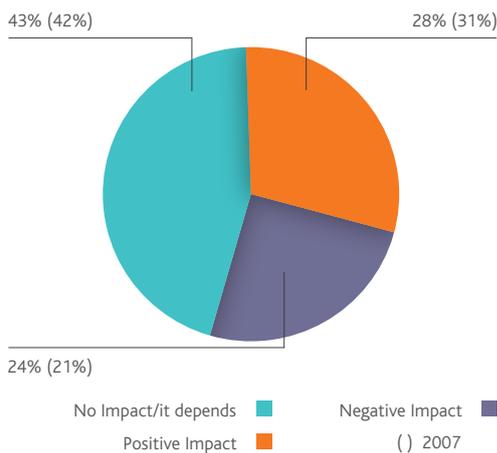
What was the position of the wind farm when you viewed it?



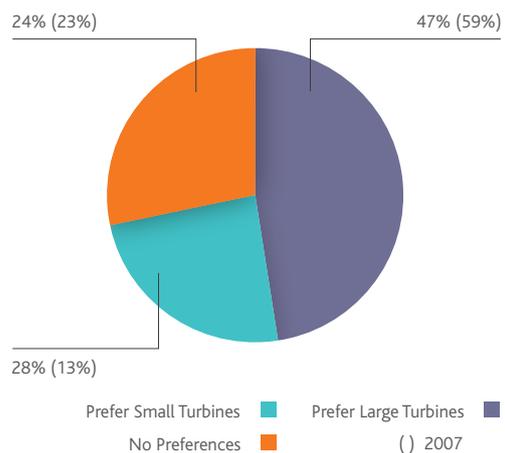
How did viewing a wind farm impact on your sightseeing?



What impact would the likelihood of further wind farms have on your decision to visit Ireland again?



What is your preferred wind farm size?



Perceived Impact of Wind Farms on Future Visits to Ireland

Seven out of 10 (or 71%) of visitors claim that potentially greater numbers of wind farms in Ireland over the next few years would have either no impact or a positive impact on their likelihood to visit Ireland. Of those who feel that the potentially greater number of wind farms would impact positively on future visits, the key driver is support for renewable energy, followed by potential decreased carbon emissions. There has been a slight increase from 21% to 24% in those who say it would impact negatively on their likelihood to visit again due mainly to the negative aesthetics of wind farms followed by preferences for alternative renewable energy sources.

Change in Perceptions

In the ten years since the original SEI study in 2002 visitors attitudes to wind farms in Ireland have not changed dramatically, and there is still generally a positive disposition amongst tourists to wind farms. However there has been somewhat of an increase in the polarisation of views amongst our visitors since 2007, in that any increase in support has been countered by an increased negative cohort, leaving less visitors neutral or undecided on the subject. Interestingly those who have not seen a wind farm on this visit have more negative opinions regarding the theoretical impact of a wind farm on their sightseeing compared to those who have actually seen one. This suggests there are some negative associations with wind farms that in reality do not materialise for those who have seen them.

Given the scenario where more wind farms are to be built in Ireland in the future, the most widely held view is that this will not impact their likelihood to visit the area again, with a slightly greater majority saying that this would have a positive rather than a negative impact. It is worth noting that based on 2007 the proportion citing a positive impact has declined in favour of those who feel it would have no impact.

The Challenge

While there is still generally a positive disposition among tourists to wind farms in Ireland, it is important also to take in to consideration the one in five tourists who are negatively disposed to wind farms. Although the 2012 survey does indicate a greater perception that wind farms have a positive impact on the Irish landscape compared to 2007, the increased support for wind farms has been offset by an increased negative cohort, leaving fewer visitors neutral or undecided with regard to wind farm development. In general wind farms may be more of a norm, as

indicated by the fact that almost all (95%) have seen a wind farm at some stage and also growing awareness that wind farms occur in Ireland, with over half now claiming to have seen a wind farm on this particular visit.

The challenge still lies in striking a balance between the maintenance of landscape character and scenery as a tourism asset, and facilitating the development of further wind farms to ensure Ireland meets its GHG reduction targets. This puts even greater emphasis on the need for good planning from the very beginning of the process and particularly in relation to site selection, design and pre-planning consultation stages.

Given the preference amongst tourists for wind farms with a smaller number of turbines and in certain landscapes, Fáilte Ireland considers that Strategic Environmental Assessment should be used as a tool in planning wind energy developments, in the case of both on-shore and off-shore wind farms. This will help to avoid cumulative impacts that might arise resulting in too many wind energy developments occurring in a particular area.

The *Planning Guidelines on Wind Energy Development* issued by the Department of the Environment, Heritage and Local Government, require developers to assess the effect of wind energy development on tourism and recreational activities and to consult with Fáilte Ireland as part of the planning process. These guidelines are currently being revised by the Department of Environment, Community and Local Government, and Fáilte Ireland has made a submission to that review. At the time of writing the revised Guidelines had not yet been issued.

Local Authorities in their adherence to the Wind Energy Guidelines should ensure that any wind energy strategies for their administrative areas are based upon, inter alia, a robust landscape sensitivity analysis and an analysis of the tourism amenity value of the area. Fáilte Ireland will continue to provide advice to Local Authorities, as resources allow, on the preparation of wind energy strategies and will provide comment on individual wind farms proposals either at the pre-planning stage or as part of the planning process.



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