



Tourist Attitudes towards Wind Farms

Research Study Conducted for
Scottish Renewables Forum &
the British Wind Energy Association

Summary Report

September 2002



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Research commissioned by:



Front cover image: Beinn an Tuirc wind farm in Argyll (courtesy of ScottishPower)

Preface

Background

The Scottish Renewables Forum (SRF) has represented the renewable energy industry in Scotland since 1996. The SRF is now a Company Limited by Guarantee registered in Scotland with Directors appointed from representatives of each renewable energy technology in Scotland. The SRF is a cluster of key players with a common interest in the development of renewables in Scotland. The SRF acts on behalf of its members to act as a unified voice for the renewable energy industry in Scotland, communicating with government and other decision makers at the highest levels, responding to consultations, conducting research, disseminating information, including commercial and market intelligence and acting as a forum to stimulate and maintain effective dialogue between the members and to stakeholder groups.

From its early beginnings more than twenty years ago as the professional association for researchers and enthusiasts in the then embryonic wind industry, the British Wind Energy Association (BWEA) has developed into the largest renewable energy trade association in the UK. With a membership of over 500, including more than 200 corporate members, generating an annual turnover of nearly half a million pounds the BWEA seeks to consolidate and extend the wind energy industry in the UK. The BWEA is committed to supporting the continuing development of the wind energy industry.

The SRF & BWEA commissioned MORI Scotland, as an independent research agency, to undertake a programme of research among tourists visiting Argyll & Bute. The purpose of the survey was to assess tourists' awareness and perception of wind farms in the area, to help answer the question about how wind farm development might affect tourism in Scotland.

Methodology

MORI interviewed 307 tourists face-to-face in five locations Tarbet, Inverary, Oban, Campbeltown and Lochgilphead during the week-ends of 21 – 23 and 27 – 29 September 2002. In particular, the survey looked at:

- Frequency of visits to Argyll & Bute.
- Reasons for being attracted to visit the area;
- Aspects of the area which are of most interest to tourists;
- Aspects of the area which tourists found unattractive;
- Level of awareness of wind farms in the area;
- Recall of location of wind farms;
- Effect of presence of wind farms on tourists' impression of Argyll as a place to visit;
- Propensity to visit Argyll again in the future;
- Potential interest in visiting a wind farm should it be opened to the public with a visitor centre.

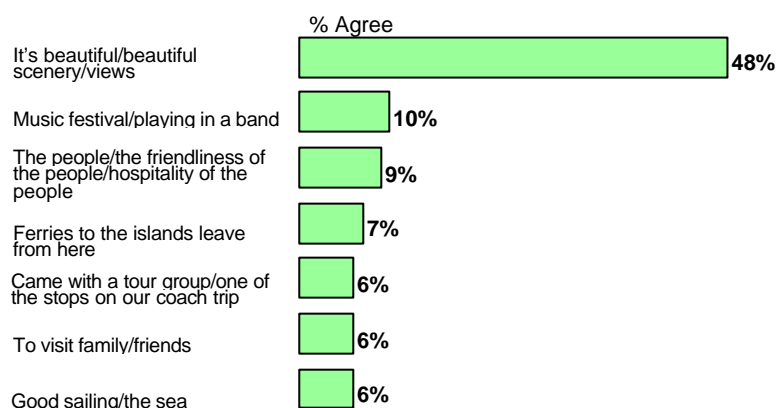
This report outlines the main findings from the survey.

Summary of Findings

Of those tourists interviewed, the majority (60%) have visited the area on four or more previous occasions, while one in five were on their first visit. Those who have visited more frequently are mainly resident in Scotland (76%), while a smaller proportion (43%) are resident elsewhere in the U.K. Around three in four who have visited more frequently are either aware of, or have seen wind farms in the area. The majority (67%) have visited within the last 12 months. The main reasons for visiting the area are due to the *'beautiful scenery and views'* as mentioned by almost half (48%) of the tourists interviewed. Other reasons cited encompass the music festival (10%) and the friendliness/hospitality of the people (9%) as illustrated in the chart below.

Attractiveness of Area

Q What is it that attracted you to visit this area in particular?



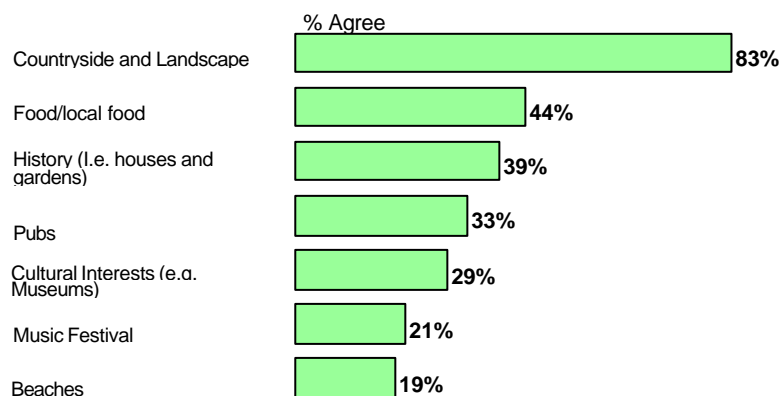
Base: All respondents (307)

Source: MORI

When asked which aspects of the area tourists found of particular interest to them, once again, the main one cited relates to the *'countryside and the landscape'* as mentioned by 83% of respondents. Other aspects cited included the food (44%), the history (39%) and the pubs (33%).

Aspects of Interest in the Area

Q Which of the aspects on this card would you say are of particular interest to you in this area?



Base: All respondents (307)

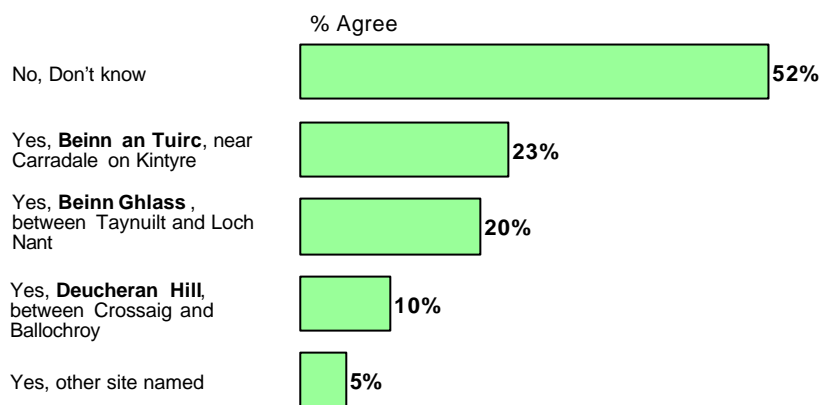
Source: MORI

In addition to being asked what tourists found particularly attractive about the area, they were asked if there was anything 'unattractive', the majority (71%) maintained that there was nothing. A very small proportion cited that there was 'too much litter' (3%).

Tourists were further asked whether they were aware of any wind farms in the area. The survey revealed that this was fairly mixed with two in five aware and the remaining three in five not aware. Of those who are aware of the existence of wind farms, circa half (52%) cannot recall the location with around one in four citing Beinn an Tuirc and one in five Beinn Ghlass.

Locations of Wind farms in Argyll

Q Can you remember where they are in Argyll?



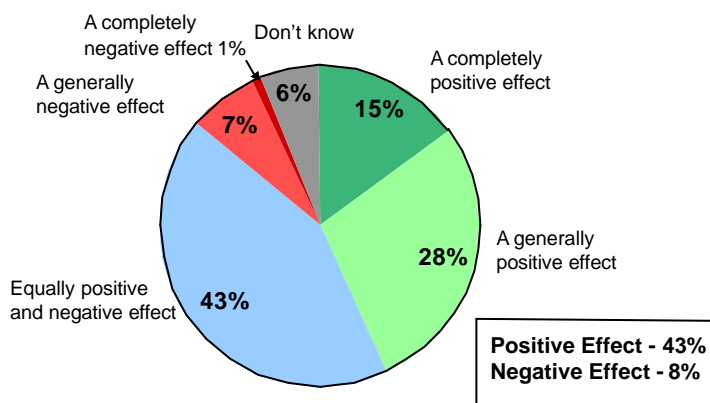
Base: All who are aware that there are a number of wind farms in Argyll (122)

Source: MORI

Almost half (49%) have actually seen the wind farms. When asked whether the presence of wind farms had a positive or negative effect, two in five (43%) maintained that it had a positive effect, while a similar proportion felt it was equally positive and negative. Less than one in ten (8%) felt that it had a negative effect.

Effect of Presence of Wind farms

Q What effect, if any, would you say the presence of that/these wind farm(s) has had on your impression of Argyll as a place to visit?



Base: All who are aware that there are a number of wind farms in Argyll (122)

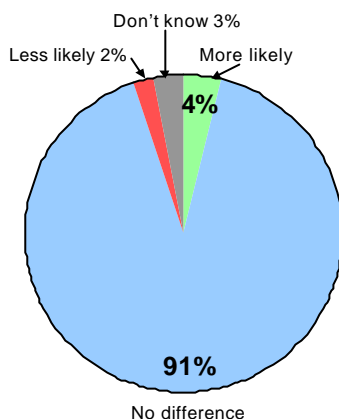
Source: MORI

Those who are not aware of the wind farms were shown a map with three areas highlighted (see Appendix 2). All three locations represented areas in which wind farms can be found. The majority (71%) have been in one or more of these locations, however, have not actually seen them during their visit.

When asked whether the presence of wind farms in Argyll made any difference to the likelihood of them visiting the area, the majority, (91%), maintained that it made no difference.

Likelihood of Visiting Argyll in the Future

Q Has the presence of wind farms in Argyll made you any more likely to visit the area in future, made it less likely, or has it made no difference?



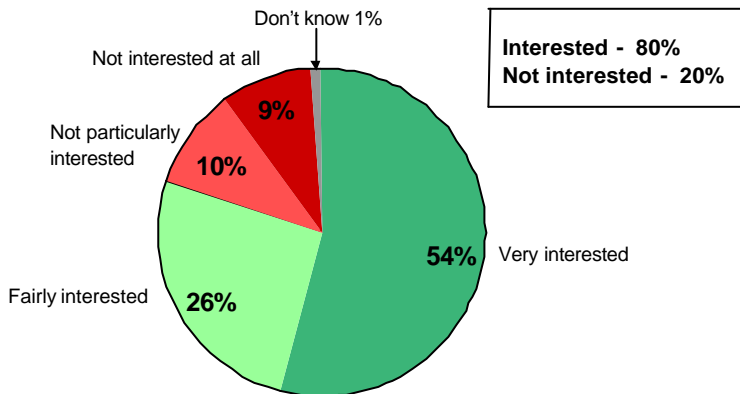
Base: All respondents (307)

Source: MORI

Finally, tourists were asked to what extent they would be interested in visiting a wind farm if it were opened to the public with a visitor centre. The majority, (80%) would be interested with over half (54%) 'very interested'. Around one in five are 'not interested'.

Visiting Windfarm/Visitor Centres

Q If a windfarm in Argyll were to open to the public with a visitor centre showing information about how it works, to what extent would you be interested in visiting it on this or another trip to the area?



Base: All respondents (307)

Source: MORI

Implications

It would appear that many tourists visit Argyll & Bute because of the landscape, i.e. its beautiful views and scenery. Although the majority of tourists have visited the particular areas in which wind farms are located, many have nevertheless not been aware of their existence. The research reveals that the wind farms are not seen as having a detrimental effect on their visit and would not deter tourists from visiting the area in the future. Indeed, the research has shown that the majority viewed the prospect of having a visitor centre at the site of wind farms favourably and would, in fact, be interested in visiting and subsequently finding out more information on wind farms and their operation.

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