



Fáilte Ireland

National Tourism Development Authority

Visitor attitudes to windfarms

11th December 2008

Paddy Mathews

Manager, Environment and Planning

Sustainable tourism

Happy tourists

+

Happy locals

+

Profitable tourism businesses

+

A clean, high quality environment

=

Sustainable tourism

Why is environment important for tourism?

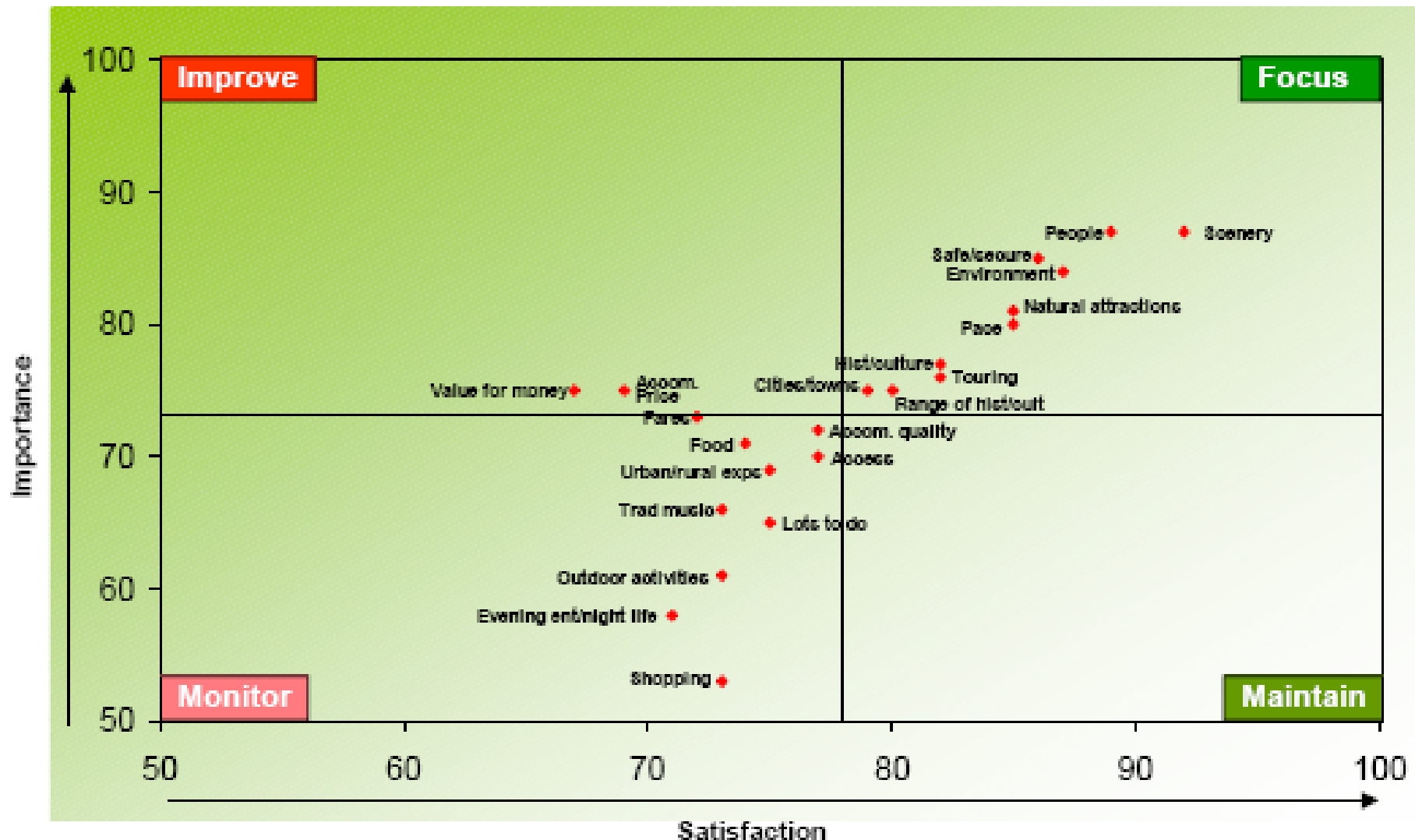
Environment is a core attractor for visitors

- Scenery 80%
- Natural, unspoilt environment 73%
- Attractive cities and towns 55%

(Visitor Attitudes Survey, 2007)

STRATEGIC IMPROVEMENT MATRIX IMPORTANCE VERSUS SATISFACTION

Base: All Respondents



Why a survey of visitor attitudes to wind farms?

- Failte Ireland needed to 'take a view'
- Prescribed body in the planning process
- Aim of research was to definitively assess whether or not development of wind farms would spoil tourists' enjoyment of Irish scenery

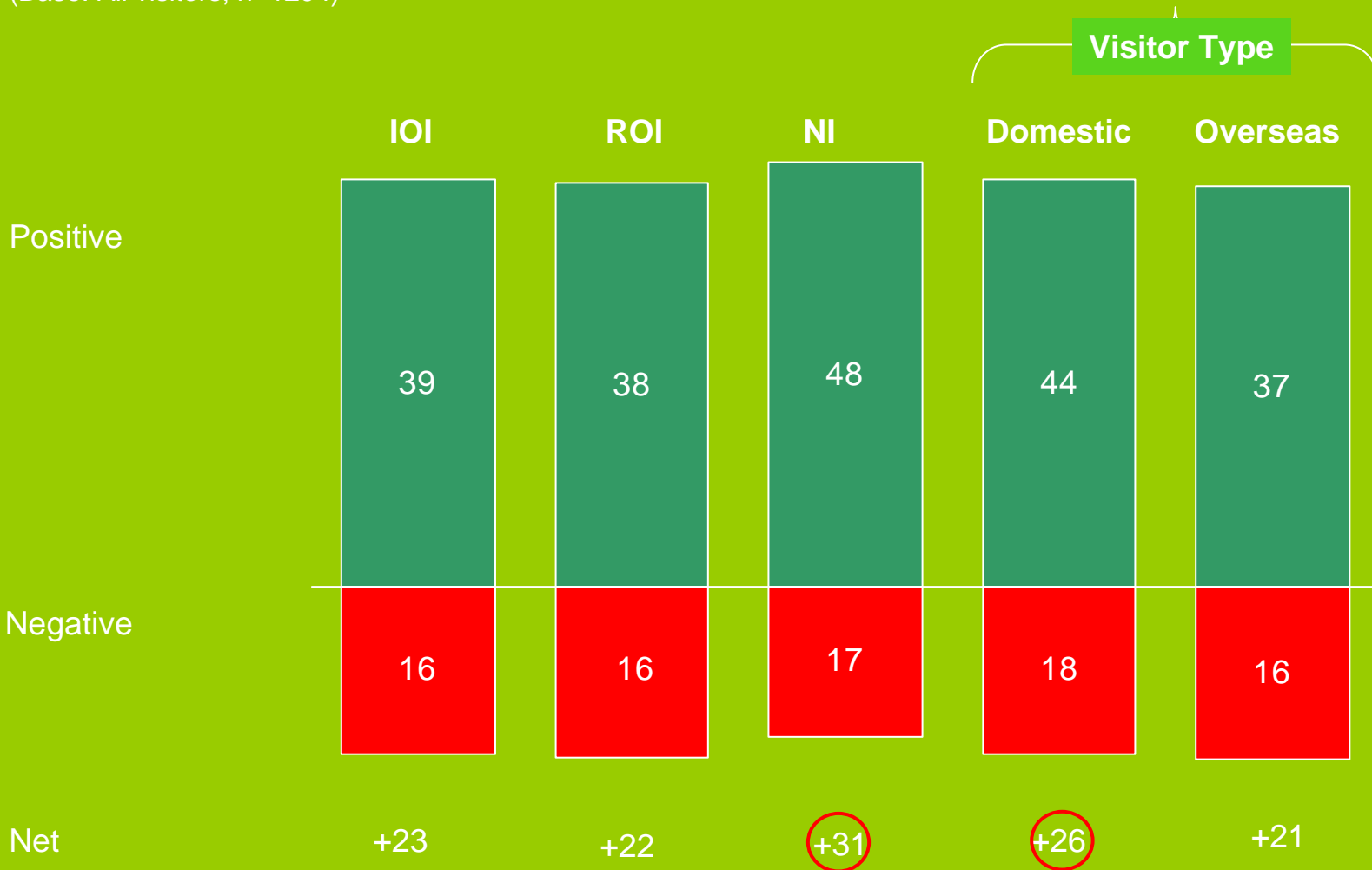
Survey methodology

- Face to face interviews with tourists in Tourism Information Offices North and South
- Field work dates: 23rd August – 27th September 2007

	Number of Interviews	Interviews as % of Total	Weighting to Reflect Visitor Numbers
ROI	1000	(77%)	93%
NI	300	(23%)	7%
IOI	1300	100%	100%

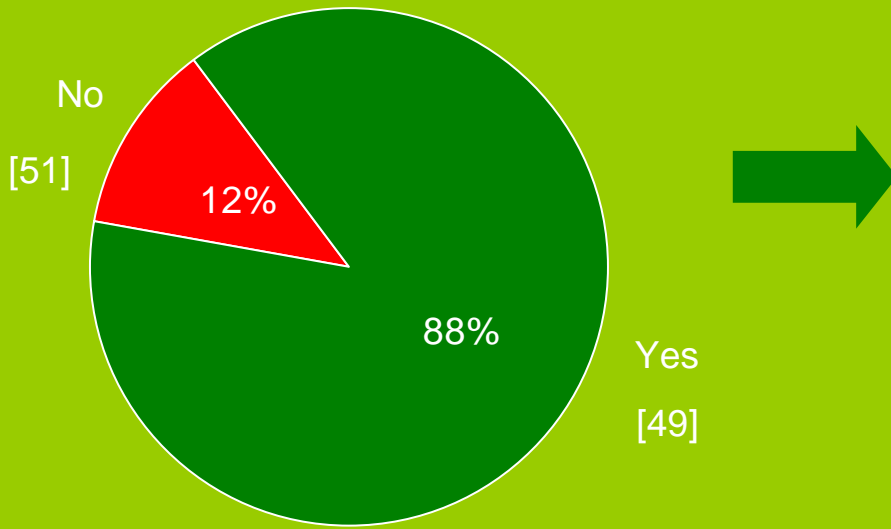
Impact of Windfarms on Irish Landscape - Detail

(Base: All visitors, n=1294)



Incidence of Having Seen a Windfarm Ever

(Base: All visitors, n=1294)



	ROI	NI
Male	90	97
Female	83	95
15-34	83	95
35-55	91	98
55+	88	97
VISITOR		
Domestic	89	
Overseas	87	

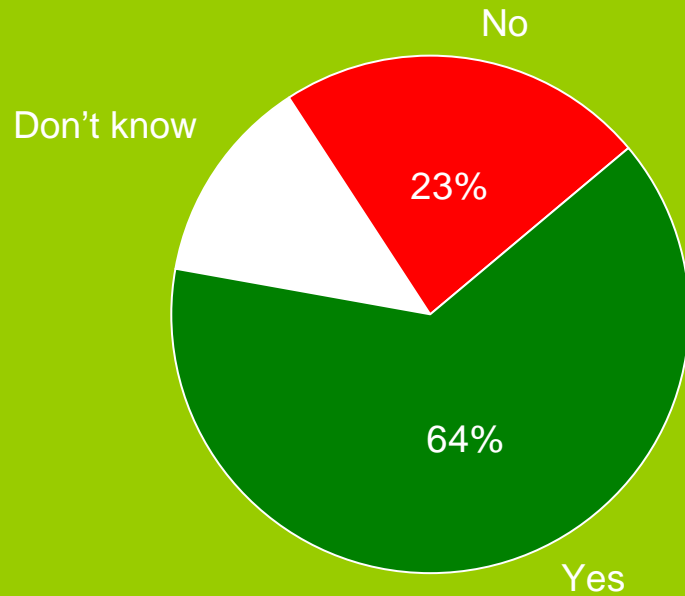
ROI	87%
NI	96%

[] SEI (2003) Survey of ROI Adults 15+

Knowledge/Experience of Windfarms on this Holiday

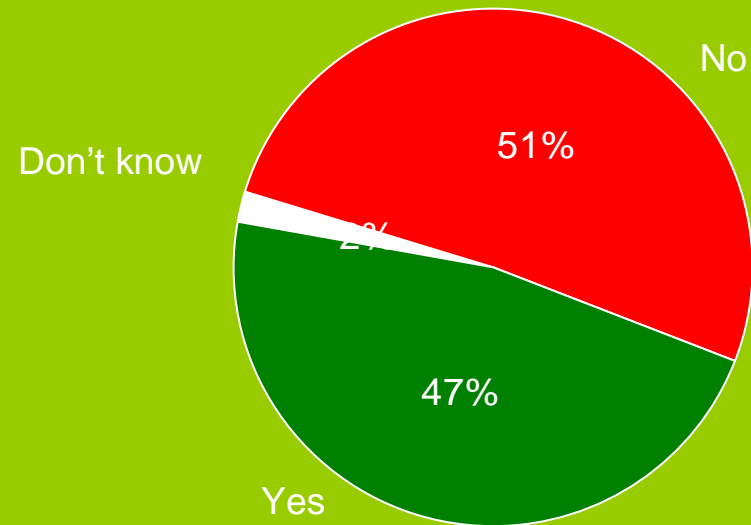
(Base: All visitors, n=1294)

Any on Island of Ireland?



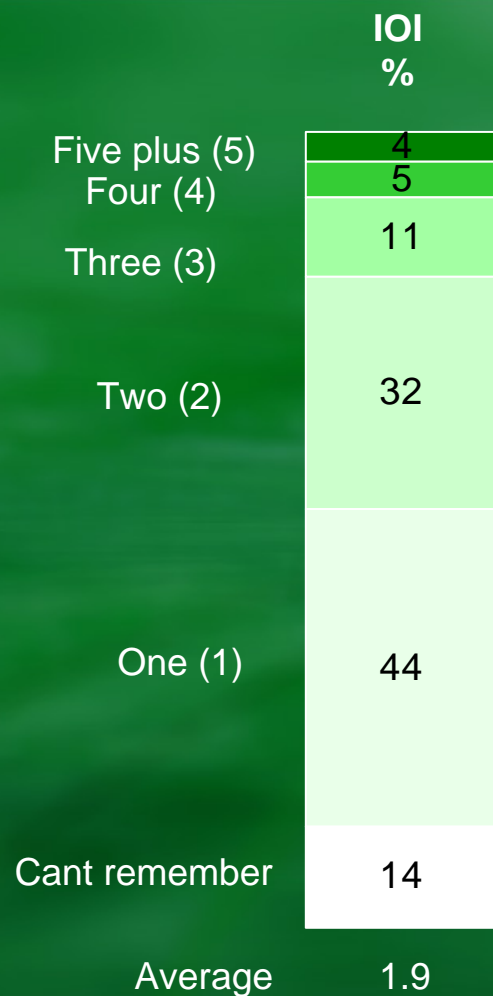
ROI total	63	Tourist	
		Domestic	86
Dublin	54	Overseas	56
Outside	67		
NI total	62		
Belfast	48		
Outside	74		

Seen on this holiday?



ROI total	46	Tourist	
		Domestic	51
Dublin	29	Overseas	45
Outside	53		
NI total	59	Holiday Type	
Belfast	48	City Break	30
		Mostly City	26
Outside	61	Mostly Countryside	60
		Both	50

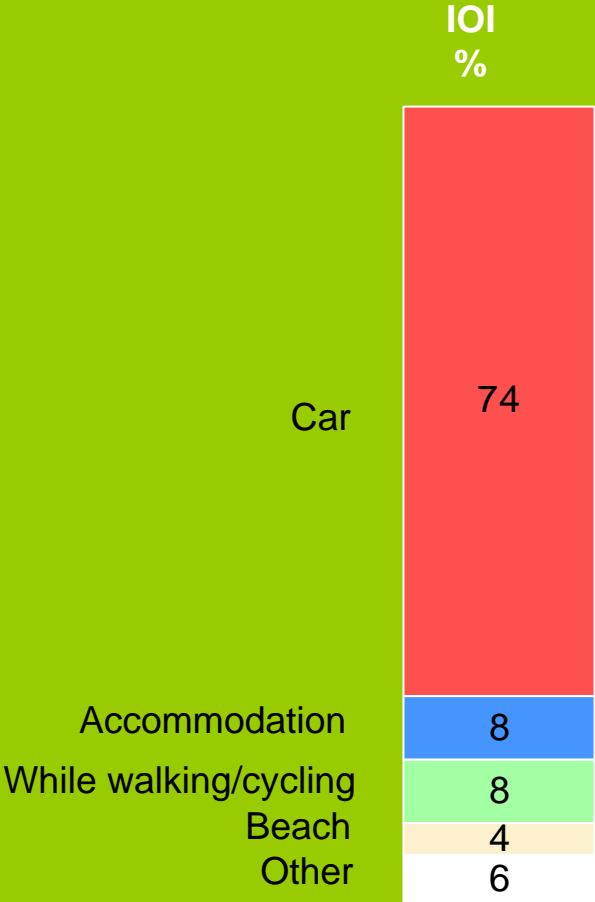
Number of Windfarms encountered this holiday



Average Number seen X Region	
ROI total	1.9
Dublin	2.3
Outside	1.8
NI total	2.0
Belfast	1.9
Outside	2.0

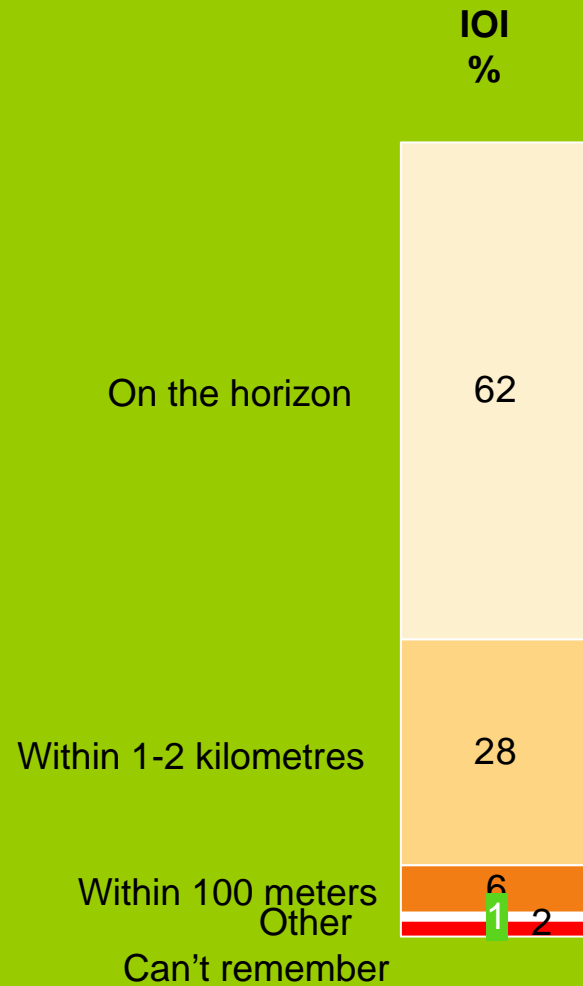
Location of Windfarm Sighting

(Base: All saw wind farm on this holiday)



Position of Windfarm

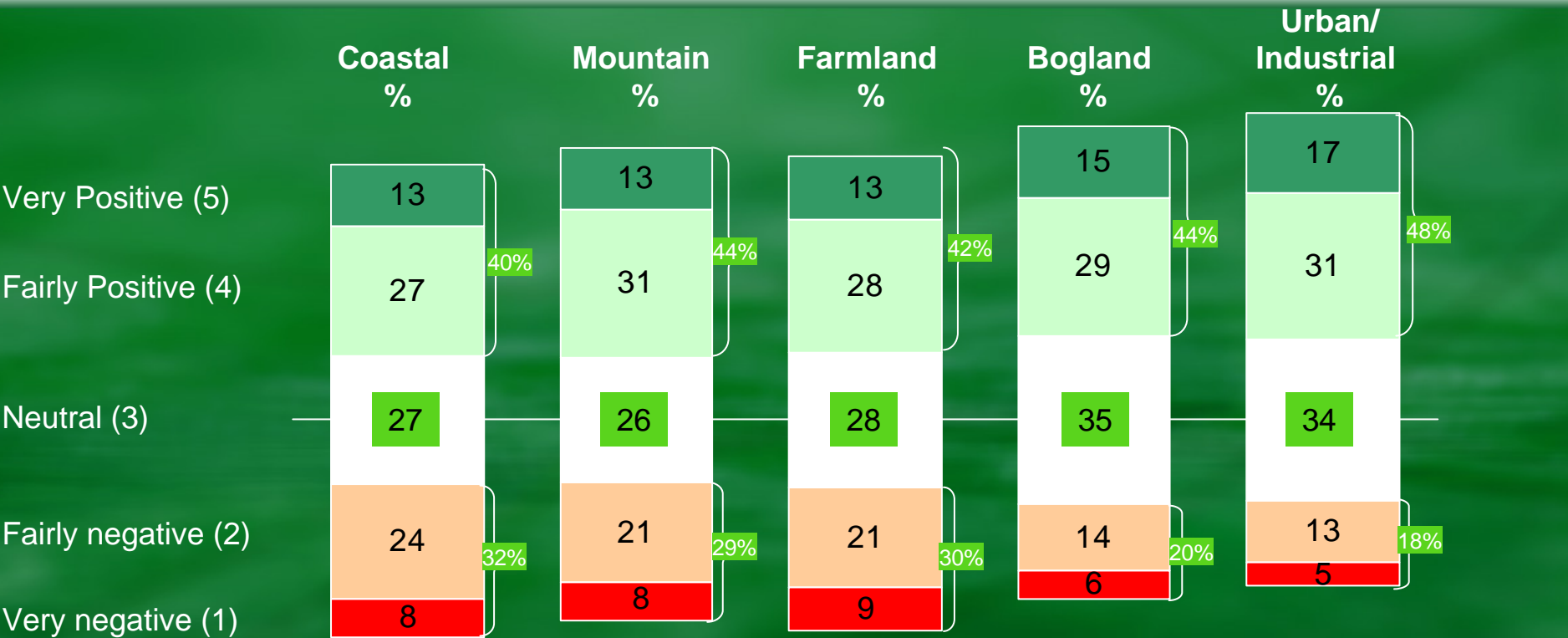
(Base: All saw wind farm on this holiday)



Impact on Sightseeing

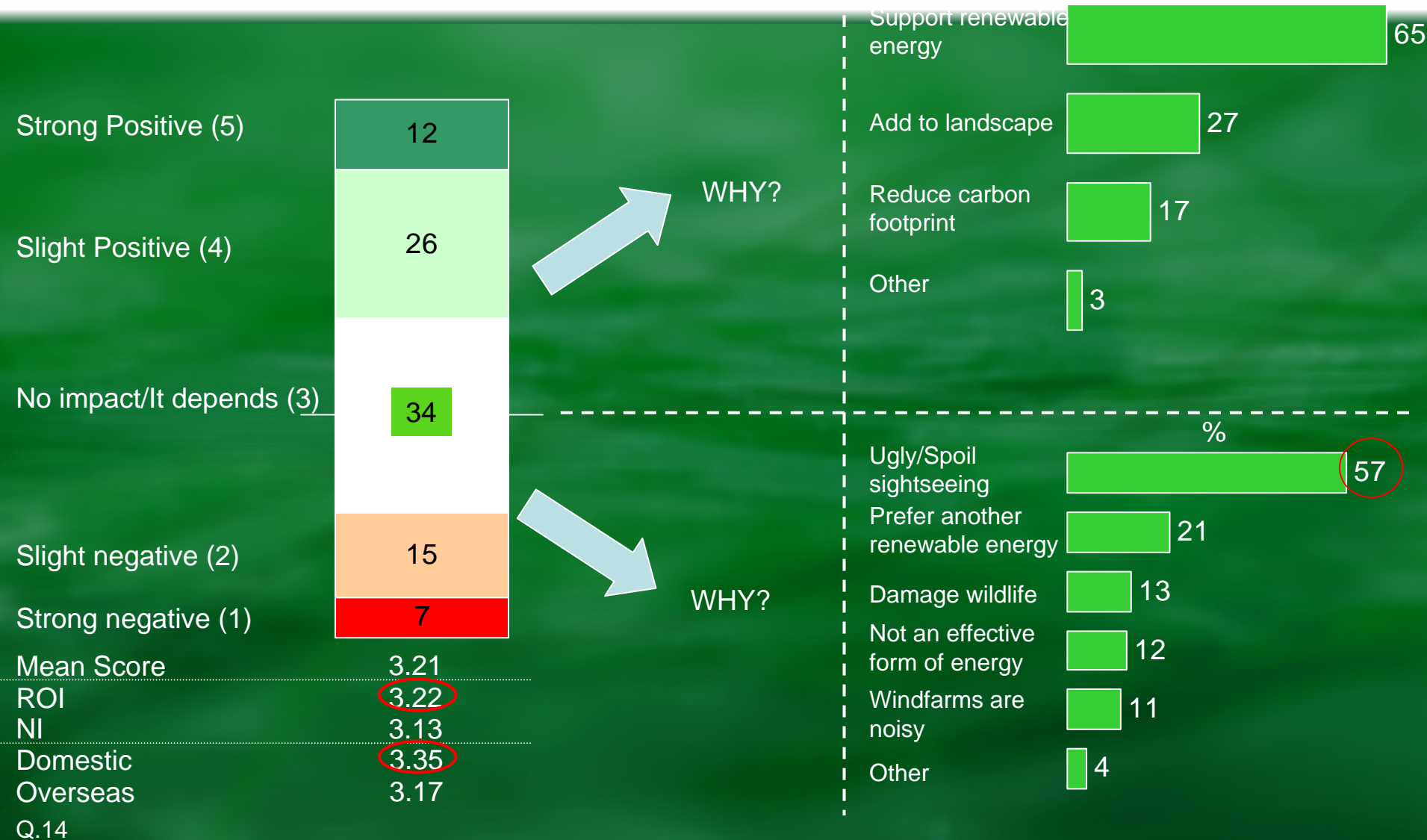


Effect of Windfarm on Landscape



Mean Score	3.1	3.2	3.2	3.3	3.4
ROI	3.1	3.2	3.2	3.3	3.4
NI	3.0	2.9	3.0	3.5	3.5
SEI	3.3	3.3	3.3	3.3	3.3
Domestic	3.2	3.3	3.3	3.5	3.5
Overseas	3.1	3.2	3.1	3.3	3.4

Windfarms Impact on Future Visits to Area





The Issue

The first wind farm in Ireland was completed in 1992 at Bellemeek, Co. Mayo and by mid-2007, there were 67 wind farms connected to the national grid. Wind farms have elicited a range of reactions from Irish people and in 2000, Sustainable Energy Ireland (SEI) commissioned a survey aimed at identifying public attitudes to renewable energy and to wind energy in Ireland. The results of this survey¹ can be downloaded from SEI's website at www.sei.ie.

The SEI survey found that, in general, Irish people are positively disposed towards the development of wind farms. However, the survey also indicates 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 recreational tourism marketing campaigns for decades. In 2007, 86% of overseas holidaymakers to Ireland rated scenery as an important reason for their trip (the second highest category), followed by the natural/unique environment at 74%.² Furthermore, over one quarter of holidaymakers believed that scenery is a factor that distinguishes Ireland from other destinations. 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 meet its Kyoto Protocol commitments and so achieve the more ambitious EU targets of a reduction in Greenhouse Gas (GHG) emissions of 20% by 2020, it will, 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 will be required. Wind farms tend to be located in upland areas where the wind speeds are greatest. Our upland areas also contain some of our most valuable scenic landscapes. In response to the potential conflicts that could arise from the co-location of scenic landscapes and opportunity areas for wind farms, Fáilte Ireland, in association with the National Ireland Tourist Board (NITE), 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 photographs of wind farms in particular landscape types that were used to elicit an opinion from respondents). The purpose of the survey was to assess whether or not the development of wind farms would impact on the enjoyment of the Irish scenery by holidaymakers.

The survey was undertaken by London-based Market Research and involved face-to-face interviews with 1,300 tourists, both domestic (25%) and overseas (75%) (1,000 in the Republic, 300 in Northern Ireland). This short document summarises the main findings of the survey. The full results can be viewed on the Government page of Fáilte Ireland's website www.fai.ie/irland.ie.

¹ Sustainable Energy Ireland (2002) *Public Attitudes to Development of Wind Energy in Ireland*, Dublin.
² www.fai.ie/irland.ie/destination/market
³ European Commission (2007) *Energy Policy in an Energy Union*, Luxembourg, p. 20.

Thank you

paddy.mathews@failteireland.ie