



# Wind Farm Consumer Research

## Background

In 2011 VisitScotland commissioned omnibus research to learn more about consumer attitudes to wind farms and their effect on tourism, in order to inform VisitScotland policy.

Questions were entered onto an omnibus study with OnePoll, an online market research company. 2,000 interviews were undertaken with a nationally representative UK sample with a further 1,000 interviews conducted with a Scotland representative sample (both samples being asked very similar questions). A screening question was put in to the survey to ensure that the respondents had taken a holiday/short break in the UK in the past 12 months and would intend to do so again in the future.

This report provides a summary of the key data available from the omnibus results.

## Results

### 1.1 Importance of Natural Scenery & Landscape

UK respondents were first asked how important the natural landscape and countryside scenery were to them when taking holidays or short breaks in the UK.

The majority (86%) were in agreement that they were important factors with only 4% stating that scenery and landscape weren't important to them. 10% claimed they were neither important or unimportant.

For the Scotland sample, a slightly larger majority than the UK (91%) were in agreement that landscape and scenery were important factors with only 2% stating that they weren't important to them. 7% claimed they were neither important or unimportant.

## **1.2 Whether seen a wind farm whilst on a UK (Scotland) holiday/short break**

Respondents were then asked whether they had actually seen a wind farm whilst on a holiday or short break in the UK (or in Scotland for the Scottish sample).

Almost two thirds of UK respondents (67%) claimed that they had seen a wind farm whilst on a break in Scotland with 22% stating they had not. 11% claimed they could not remember having seen a wind farm.

A higher percentage of Scotland respondents (77%) claimed to have seen a wind farm whilst on a holiday or short break in Scotland with 16% stating they had not. 7% claimed they could not remember having seen a wind farm whilst on holiday in Scotland.

## **1.3 Presence of wind farms - decision making**

UK respondents were asked whether the presence of a wind farm would affect their decision about where to visit or where to stay on a UK holiday or short break. 80% stated their decision would not be affected with 20% claiming that it would be affected.

For the Scotland residents, 83% stated their decision would not be affected by the presence of a wind farm with 17% claiming that it would affect their choices over which area to visit/where to stay whilst on a Scottish break.

## **1.4 Attitudinal Statements**

UK respondents were then asked a series of 10 attitude statements about wind farms in the UK and asked to indicate the extent to which they agreed or disagreed on a 5 point scale from 'Disagree Strongly' to 'Agree Strongly'. Scotland respondents were asked the same statements but with regard to holidays and short breaks in the Scottish countryside as opposed to the UK countryside.

### **1.4.1 Wind farms spoil the look of the UK (Scottish) countryside**

	<b>UK Sample</b>	<b>Scotland Sample</b>
<b>Strongly Disagree</b>	28.2%	27.5%
<b>Slightly Disagree</b>	23.9%	24.6%
<b>Neither agree or disagree</b>	29.3%	28.3%
<b>Slightly agree</b>	10.4%	10.6%
<b>Strongly agree</b>	8.3%	9.0%

This statement mainly generated disagreement amongst respondents suggesting at the current time UK/Scotland consumers do not feel that wind farms spoil the look of the UK/Scotland countryside. However, 18.7% of UK consumers were in agreement as well as nearly 20% of Scotland respondents that the countryside was spoilt by these structures.

### **1.4.2 I would be interested in visiting a wind farm development if there was a visitor centre**

The responses to this statement suggest that there would be a fair degree of interest in visiting a wind farm visitor centre with 40% of UK respondents stating that they would be interested with just over 33% stating no interest. Almost 27% were neutral on the subject, neither agreeing or disagreeing.

For Scotland respondents, 46% claimed to be interested in visiting a visitor centre with 27% disagreeing.

### **1.4.3 It would be an added attraction if wind farms were located in popular tourist areas**

	<b>UK Sample</b>	<b>Scotland Sample</b>
<b>Strongly Disagree</b>	20.9%	21.2%
<b>Slightly Disagree</b>	21.9%	21.7%
<b>Neither agree or disagree</b>	35.5%	36.2%
<b>Slightly agree</b>	14.0%	12.8%
<b>Strongly agree</b>	7.7%	8.1%

It appears that respondents would in general prefer not to see wind farms in popular tourist areas with 43% of respondents disagreeing with this statement. However, 22% of UK respondents and 21% of Scotland respondents were in agreement that it would be an added attraction.

**1.4.4 I would prefer to see 20 wind farm developments each with 10 turbines, rather than a single large development with 200 turbines**

	UK Sample	Scotland Sample
<b>Strongly Disagree</b>	11.7%	12.5%
<b>Slightly Disagree</b>	15.1%	15.2%
<b>Neither agree or disagree</b>	42.7%	45.7%
<b>Slightly agree</b>	19.7%	15.7%
<b>Strongly agree</b>	10.9%	10.9%

There are mixed results to this statement with just over 30% of UK respondents and 28% of Scotland respondents in general agreement. However, 27% of respondents disagreed to some extent with this statement with a larger proportion claiming to neither agree or disagree with the statement.

**1.4.5 At the moment, one of the main attractions of wind farms is that they are relatively unique - and few and far between**

	UK Sample	Scotland Sample
<b>Strongly Disagree</b>	11.9%	11.1%
<b>Slightly Disagree</b>	17.1%	18.2%
<b>Neither agree or disagree</b>	41.1%	41.4%
<b>Slightly agree</b>	23.3%	22.7%
<b>Strongly agree</b>	6.8%	6.6%

This statement had around 30% of respondents agreeing with it (Scotland respondents 29%) to some extent with around further 29% disagreeing. Once again a large proportion (41%) claimed to neither agree nor disagree both within the UK sample as a whole as well as in the Scotland sample.

**1.4.6 Seeing a wind farm would add to my enjoyment of the UK (Scottish) countryside**

	UK Sample	Scotland Sample
<b>Strongly Disagree</b>	18.9%	17.7%
<b>Slightly Disagree</b>	21.9%	22.9%
<b>Neither agree or disagree</b>	38.0%	37.5%
<b>Slightly agree</b>	14.4%	15.6%
<b>Strongly agree</b>	6.9%	6.3%

41% of UK and Scotland respondents disagreed that seeing a wind farm would add to their enjoyment of the UK/Scotland countryside. However, just over a fifth of respondents (21% of UK respondents and 22% of Scotland respondents) agreed with the statement.

**1.4.7 I would tend to avoid an area of the countryside if I knew there was a wind farm there**

	UK Sample	Scotland Sample
<b>Strongly Disagree</b>	30.9%	29.4%
<b>Slightly Disagree</b>	24.1%	26.6%
<b>Neither agree or disagree</b>	26.6%	27.4%
<b>Slightly agree</b>	10.4%	9.5%
<b>Strongly agree</b>	8.1%	7.1%

18% of UK respondents and 17% of Scotland respondents agreed that they would tend to avoid any parts of the countryside with wind farms. However; a significantly larger proportion (55% of UK and 56% of Scotland respondents) claimed they would not avoid such an area.

**1.4.8 I have no strong opinions one way or the other on the development of wind farms**

Around 1/3 of all respondents claimed that they had strong opinions on the subject of wind farms with just under 29% claiming that they did not have a strong opinion. 38% of UK respondents were neutral on this issue (rising to 40% of Scotland respondents).

**1.4.9 Using wind farms in the promotion to tourists would provide an added appeal to visitors**

	UK Sample	Scotland Sample
<b>Strongly Disagree</b>	15.6%	14.8%
<b>Slightly Disagree</b>	18.8%	18.9%
<b>Neither agree or disagree</b>	41.4%	42.4%
<b>Slightly agree</b>	18.2%	17.9%
<b>Strongly agree</b>	6.2%	6.0%

Around a third of UK and Scotland respondents disagreed that wind farms would provide an added appeal to visitors with around a quarter (24%) thinking that they would be an added appeal. Once again a large proportion claimed to have no real agreement or disagreement with the statement.

## **1.5 Overall Statements**

Finally respondents were then asked on a scale of 1-10 (with 1 equaling 'strongly disagree' and 10 equaling 'strongly agree') how they felt about the following 2 statements:-

### ***1.5.1 Wind farms are necessary for the future of energy generation***

The mean score for this question for UK respondents was 7.63 which suggests that respondents tended to agree that wind farms are necessary for the future of energy generation.

Scotland respondents scored 7.55 so slightly less in agreement with this statement than the UK sample as a whole.

### ***1.5.2 Wind farms are an eye sore on the landscape and ruin the tourism experience***

The mean score for this question for UK respondents was 4.63 suggesting that respondents do not feel that wind farms ruin the tourism experience.

Scotland respondents scored 4.32 so again tending to disagree that wind farms currently ruin the tourism experience.

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