

WESTERN ISLES TOURIST
BOARD

WIND FARM RESEARCH

Final Report

THE **m**arket
SPECIALISTS

Barncluith Business Centre, Townhead Street, HAMILTON ML3 7DP
Tel: 01698 477555. Fax: 01698 477884
E-mail: enquire@themarketspecialists.com



INVESTORS IN PEOPLE

March 2005

1. Introduction

- 1.1 Major wind farm development is proposed for sites in the Western Isles, subject to the granting of planning consent. The Western Isles Tourist Board (WITB), at its last Annual General Meeting before being merged into the VisitScotland structure, decided to seek the views of its members on the proposals through a postal survey of its members.
- 1.2 The market specialists (Tms) was asked to undertake the research and was delighted to accept the invitation. In order to inform members of the facts as known about the development and the claimed pros and cons an objective background paper was prepared by Tms for issue along with the questionnaire and a reply-paid envelope. The questionnaire and background paper, both of which were cleared through the client, are included as Appendix A.
- 1.3 Member address labels were provided by WITB, 402 questionnaires being issued. As noted in the survey results which follow, a good response was achieved that was broadly representative of the membership universe.

2. The Survey Results

- 2.1 As noted above, 402 questionnaires were mailed to the full list of WITB members. These covered accommodation and non-accommodation tourism businesses. A total number of 139 completed responses were received, this representing a response rate of 35%. **Tables 1 and 2** compare the representation of the sample response to that of the overall population of members, **Table 1** confirming that the sample response by business type was very representative of the overall population.

Table 1: Breakdown of Total WITB Members Mailed a Questionnaire and Associated Sample Response

	Total Members Sent Questionnaire %	Total Responses to the Survey %
Serviced Accommodation	34	34
Self Catering	37	35
Non Accommodation	29	31

- 2.2 In comparing the sample response against the overall population of tourism businesses across the three main geographic areas of the Western Isles, however, the proportional response from members on Lewis was greater than the membership spread of tourism businesses in this area, while the level of response from members in the Uists and Barra was slightly less representative (**Table 2**). This result may reflect the fact that known current wind farm proposals are concentrated on Lewis.

Table 2: Location of Tourism Business

	Total Sent Out %	Total Responses %
Lewis	45	56
Harris	21	21
The Uists and Barra	34	23

- 2.3 **Table 3(a)** provides further details on the types of businesses responding to the survey in terms of member dependence on tourism for their annual income. This reveals that three-quarters of members receive at least 25% of their income from tourism and that over half of all members are dependent on it for at least 50% of their annual income.

Table 3(a): Proportion of Your Annual Income from Tourism

	Total Responses %
100%	16
51-99%	33
25-50%	26
Less than 25%	25

Table 3(b) highlights the number of years for which businesses were operated by the respondent. This shows that almost half of the businesses are under the same management for more than eleven years and just about 12% of the respondents own their business for less than three years.

Table 3(b): Number of Years Business Been Operating Under Current Management

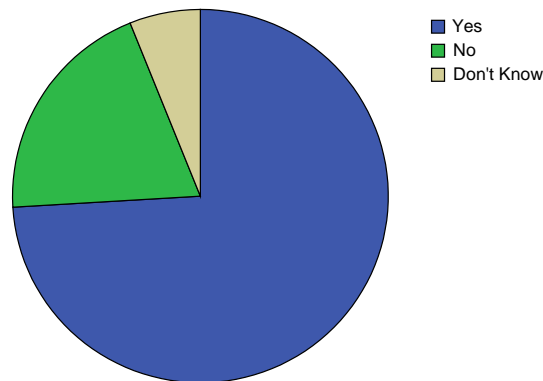
	Total Response %
Under 3 years	11.5
3 to 6 years	20.1
7 to 10 years	20.9
11 + years	47.5
Total	100.0

2.4 The remainder of the report presents the results of member views in respect of wind farm development within the Western Isles. The starting point was to ask members if they supported the aim of developing renewable energy sources in the Western Isles. The results in **Table 4** suggest that the 74% of tourist board members are supportive of the principle, while 20% are not and a further 6% are unsure.

Table 4: In principle, do you support the aim of developing renewable energy sources in the Western Isles?

	Total Responses %
Yes	74
No	20
Don't Know	6

In principle, do you support the aim of developing renewable energy sources in the Western Isles?

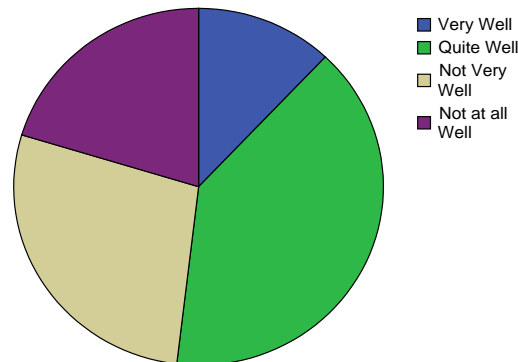


2.5 **Table 5** reports on how well tourism members perceive they have been kept informed about proposed wind farm developments in the Western Isles. The findings suggest that 52% of members are reasonably satisfied with information provided, while 48% appear less than satisfied.

Table 5: How well do you feel you have been kept informed about proposed wind farms in the Western Isles?

	Total Responses %
Very Well	12
Quite Well	40
Not Very Well	28
Not At All Well	20

How well do you feel you have been kept informed about proposed wind farms in the Western Isles?



2.6 **Tables 7 and 8** reveal the views of respondents to the two current wind farm proposals in the Western Isles: the AMEC development in North Lewis and the Beinn Mhor Power development in South Lochs. The results are similar for both developments in that 73% of members appear either *not very* or *not at all supportive* of the AMEC development, while 70% of members are not supportive of the Beinn Mhor Power project. Just over one in every ten members appears to be *very supportive* of either development. Although not apparent from the tables, our analysis also shows that a far greater proportion of members in Lewis and Harris are *not at all supportive* of either development than are tourist board members in the Uists or Barra.

Table 7: How supportive are you of the proposed wind farm development by AMEC in North Lewis that will have 234 turbines?

	Total Responses%
Very Supportive	12
Quite Supportive	14
Not Very Supportive	14
Not At All Supportive	59

How supportive are you of the proposed wind farm development by AMEC in North Lewis that will have 234 turbines?

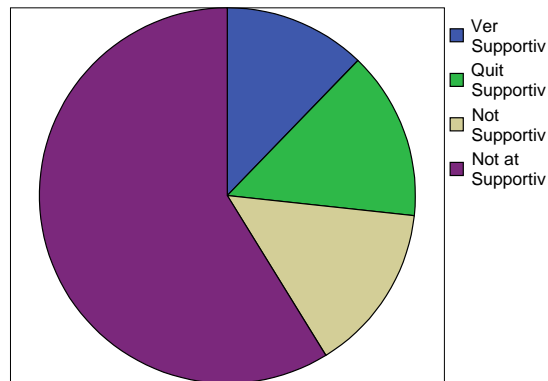
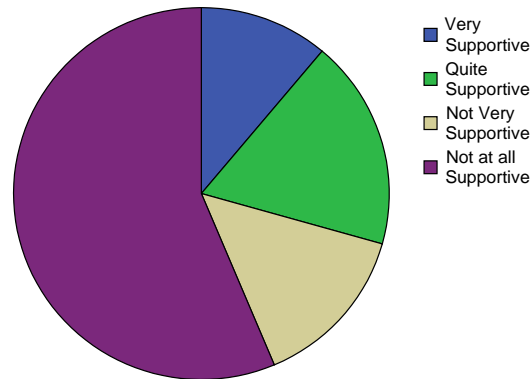


Table 8: How supportive are you of the proposed wind farm development by Beinn Mhor Power in South Lochs that will have 133 turbines?

	Total Responses %
Very Supportive	11
Quite Supportive	18
Not Very Supportive	14
Not At All Supportive	56

How supportive are you of the proposed wind farm development by Beinn Mhor Power in South Lochs that will have 133 turbines?



2.7 The results in Tables 9 reflect the views of the **58%** of respondents who were generally supportive of wind farms. That is, the 42% of overall respondents who were totally opposed to wind farms did not answer the Table 9 question. Key observations on **Table 9** are as follows.

- ❖ Of the 58% of respondents who perceived potential benefits from wind farms, the strongest positive benefit is that the wind farms will increase jobs and wealth during their construction (88% of the 58% of all respondents agreed with this statement).
- ❖ The next most significant perceived benefit is that the wind farms will also provide income over the longer term to pluralistic businesses in the Western Isles, and that they will not have any long term affects on bird/animal life.
- ❖ In contrast, however, amongst the 58% of all members who considered wind farms had benefits, respondents appear to be split on whether or not the wind farms will affect tourism numbers to the islands; in fact, the balance of these respondents *disagree* that wind farms will have a positive impact on their tourism business.

Table 9: Of the following list of potential benefits of wind farms please state how much you agree with these (based on 58% of respondents)

	Agree Strongly %	Agree %	Disagree %	Disagree Strongly %
They will increase jobs and wealth during construction	43	45	9	4
They will not affect tourism numbers to the Islands	18	33	27	22
They will not have any long-term affects on bird/animal life	20	39	18	23
They will provide important income over the longer term to plural businesses	30	38	18	14
They will have a positive impact on my tourism business	17	21	41	21

2.8 The results in Table 10 (which highlight perceived dis-benefits of wind farms) reflect the views of **75%** of all respondents. This suggests that some of the 58% of respondents from Table 9 also answered the question pertaining to Table 10 results, but that 25% of overall respondents did not. Key observations on **Table 10** are highlighted below.

- ❖ For all five statements, the collective response from members to potential dis-benefits appears to be considerably stronger than that for potential benefits, in that at least 75% of respondents either *agreed strongly* or *agreed* with the various statements.
- ❖ The greatest concern intimated by members appears to be that wind farms will *destroy the natural and visual landscape and less tourists will visit* (this view being held by 88% of all respondents to the statement – and with which 70% of respondents *agreed strongly*).

Table 10: Of the following list of potential dis-benefits of wind farms please state how much you agree with these (based on 75% of respondents)

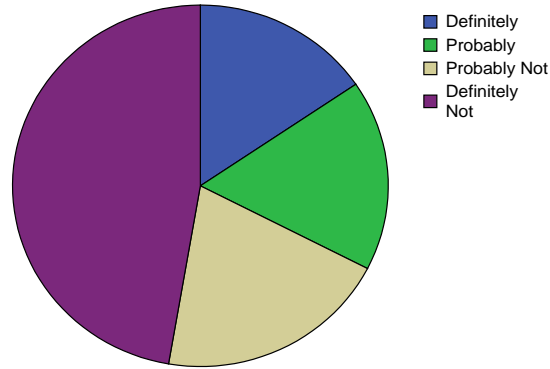
	Agree Strongly %	Agree %	Disagree %	Disagree Strongly %
They will displace leisure tourists during construction due to demand for accommodation by contractors	47	36	11	6
They will destroy the natural and visual landscape and less tourists will visit	70	18	8	4
They will a detrimental long-term effect on bird/animal life	55	23	18	4
They will not create the jobs and wealth as suggested	53	36	8	4
They will have a negative impact on my business	62	22	11	5

2.9 The concerns in Table 10 are further confirmed in **Table 11**. In this instance members were asked to assess whether or not they believed the economic benefits of the wind farm proposals for the Western Isles outweighed the perceived environmental disadvantages. As can be seen from the table, two-thirds of respondents disagreed with the statement, while only 15% of respondents believed that the economic advantages of the wind farms would *definitely* outweigh any environmental disadvantages.

Table 11: On balance, do you believe that the economic benefits of the wind farm proposals outweigh the perceived environmental disadvantages?

	%
Definitely	15
Probably	17
Probably Not	20
Definitely Not	47

On balance, do you believe that the economic benefits of the wind farms proposals outweigh the perceived environmental disadvantages?

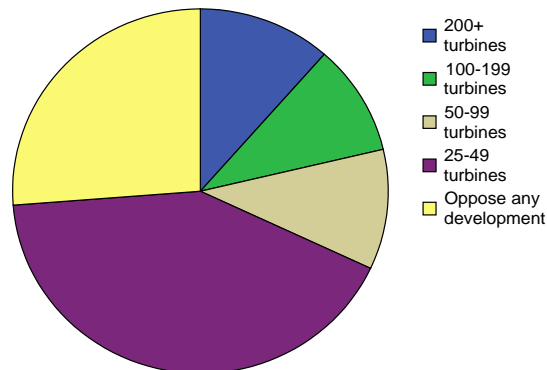


2.10 Finally, the survey also sought member views on the scale of wind farms (in terms of number of turbines) that might be acceptable at specific sites. The results show that 26% of members appear to oppose any wind farm development, while the largest single response is for smaller scale developments of 25-49 turbines. Only 21% favour developments of over 100 turbines.

Table 12: In your view, what scale of wind farm would be preferable within specific parts of the Western Isles?

	%
200+	11
100+	10
50+	11
25+	42
Oppose any development	26

In your view, what scale of wind farm would be preferable within specific parts of the Western Isles?



2.11 This concludes our presentation of the survey results. In presenting them we have avoided any comments or interpretation, our aim throughout the survey being to remain entirely objective at all stages. In some instances, comments on the questions and/or other views were expressed by respondents. In these cases, the questionnaires were copied and sent to the client without any accompanying observations. We therefore hope that we have achieved our aim of complete objectivity and that the information presented is of use to our client and the wider Western Isles tourism industry.

APPENDIX A
Questionnaire and Background Paper

QUESTIONNAIRE

1. **In principle, do you support the aim of developing renewable energy sources in the Western Isles?**

Yes	
No	
Don't Know	

2. **How well do you feel you have been kept informed about proposed wind farms in the Western Isles?**

Very Well	
Quite Well	
Not Very Well	
Not at all Well	

3. **How supportive are you of the proposed wind farm development by AMEC in North Lewis that will have 234 turbines?**

Very Supportive	
Quite Supportive	
Not Very Supportive	
Not at all Supportive	

4. **How supportive are you of the proposed wind farm development by Beinn Mhor Power in South Lochs that will have 133 turbines?**

Very Supportive	
Quite Supportive	
Not Very Supportive	
Not at all Supportive	

If you are generally supportive of one or both of the proposed wind farms please answer Q5. If you are not supportive of these please go to Q6.

5. Please state how much you agree or disagree with the following list of **potential benefits** of wind farms.

	Agree Strongly	Agree	Disagree	Disagree Strongly
They will increase jobs and wealth during construction				
They will not affect tourism numbers to the Islands				
They will not have any long-term effects on bird/animal life				
They will provide important income over the longer term to pluralistic businesses				
They will have a positive impact on my tourism business				
Other (please state)				

PLEASE GO TO QUESTION 7

6. Please state how much you agree or disagree with the following list of **potential dis-benefits** of wind farms.

	Agree Strongly	Agree	Disagree	Disagree Strongly
They will displace leisure tourists during construction due to demand for accommodation by contractors				
They will destroy the natural and visual landscape and less tourists will visit over the longer term				
They will have a detrimental long-term effect on bird/animal life				
They will not create the suggested levels of jobs and wealth				
They will have a negative impact on my tourism business				
Other (please state)				

7. **On balance, do you believe that the economic benefits of the wind farm proposals outweigh the perceived environmental disadvantages?**

Definitely	
Probably	
Probably Not	
Definitely Not	

8. **In your view, what scale of wind farm would be preferable within specific parts of the Western Isles**

200+ turbines	
100-199 turbines	
50-99 turbines	
25-49 turbines	
Oppose any development	

9. **We would welcome any other views on how you feel the proposed wind farm developments will affect your tourism business. Please state these in the space below.**

Please note that we have no wish to identify individual members from the research. However, we are seeking information on the types of business responding and would therefore be grateful if you could also answer the remaining questions below.

Location of Tourism Business?

Lewis	
Harris	
The Uists and Barra	

Type of Business?

Hotel	
Guest House/B&B	
Self-Catering, Camping, Hostels	
Non Accommodation Business	

Proportion of Your Annual Income from Tourism?

100%	
51% - 99%	
25%- 50%	
Less than 25%	

Number of Years You Have Been Operating a Tourism Business in the Western Isles?

Years

THANK YOU FOR YOUR HELP