WIND ENERGY REPORT:

VIEWS OF RESIDENTS OF PEI AND VISITORS TO PEI

Prepared by:

The Tourism Research Centre
School of Business
University of PEI

Tourism Research Centre at the University of Prince Edward Island

Date: September 4, 2008

TABLE OF CONTENTS

EXECUTIVE SUMMARY

The wind energy survey was designed by the Tourism Research Centre at the University of Prince Edward Island. It was distributed to both Island residents and visitors in a paper or web-based format generating a total of 1,676 useable responses. In total, 363 of these were from residents, 1,313 from visitors. The survey was implemented to capture perceptions of wind energy production and wind farms, and their perceived effects on the landscape. Do wind farms "fit" with "The Gentle Island" brand for visitors, and support the attempt to label PEI as a "Green Province?" In addition, the survey was structured to compare perceptions of renewable and non-renewable energy generation methods. Finally, is there support for further expansion of wind farms on PEI?

Overall, the report demonstrates support from both Islanders and visitors for the development of energy though renewable sources, particularly wind energy. Islanders wanted to see, on average, 68.5% of their energy generated via wind turbines. Visitors were slightly more supportive at 72.0%. In addition, many respondents are willing to make an indirect financial investment in renewable energy sources by paying more for electricity generated in this manner.

Support for wind energy was also evident when respondents were asked what words came to mind when thinking about wind turbines as a means to generate electricity. Many respondents used positive words such as clean, renewable, unlimited, safe, and environmentally friendly. The negative comments made were primarily from residents concerned about noise, appearance, reliability, land use, and bird kills.

There is some disagreement between visitors and Islanders as to PEI's position as "Canada's Green Province". While over 83% of visitors feel this statement is either accurate or very accurate, only 30% of Islanders feel the same way. In addition, 37% of residents feel this statement is not accurate or not at all accurate. Only 7% of visitors feel this way.

Attitudes towards wind farms on PEI are quite consistent among visitors and Islanders. Consider that at least 82% of visitors and 75% of residents either agreed or strongly agreed that "There should be more wind farms on PEI", "The PEI Provincial government should encourage the development of wind farms by providing permits to developers", "Wind farms put PEI on the forefront of the green energy movement", and "The PEI Provincial government should financially support the development of wind farms."

In addition, while only 44% of both residents and visitors either agreed or strongly agreed that a wind farm adds to the attractiveness of the area it is based, about 81% of both residents and visitors either disagreed or strongly disagreed that wind farms are a poor use of PEI's land base. Finally, 71% of Island respondents either agreed or strongly agreed that wind farms are an attraction for visitors to PEI.

In conclusion, both visitors and residents support wind energy and the current focus on wind energy production on PEI. In addition, there is strong support for further development of wind energy production on PEI. Based on this research, it appears that wind farms "fit" with "The Gentle Island" brand for visitors, and support the attempt to label PEI as a "Green Province," at least among visitors. However, there are local concerns regarding noise, health effects, land use, and changes to bird migration that should be addressed.

1. INTRODUCTION

1.1. Background

"The Gentle Island" read the tourist brochures and the Web sites extolling the virtues and pleasures of Prince Edward Island. Pictures of PEI's pastoral landscape and sandy beaches give credibility to the slogan. The message is strong and clear, and one that attempts to draw increasing numbers of tourists. But, does the reality match the image conveyed in PEI's tourism marketing? In the minds of visitors, does the slogan fit?

At the same time, PEI is encouraging and actively supporting the development of a major wind energy industry. Currently about 15% of the Island's electricity needs are generated by wind. The goal is to increase this to 33% by 2013. In addition, PEI has started to use the phrase "Canada's Green Province" on license plates and in promotional material for the province. Does this slogan accurately represent PEI?

Currently there are four wind farms on PEI at North Cape, Norway, West Cape, and East Point. Do these wind farms "fit" with "The Gentle Island" brand for visitors, and support the attempt to label PEI as a "Green Province?" In addition, what are Island residents' views on wind farms? It is important to understand the perceptions of both Islanders and visitors to this environmentally sensitive source of energy and evaluate how it affects the perceptions of PEI. Do both groups feel that the "Canada's Green Province" slogan accurately represents PEI?

Coastal and scenic touring is an integral part of the overall Island experience, and a key reason why many people visit PEI. Given the importance of the Island land and seascape on tourism and Islanders alike, the Tourism Research Centre felt that a survey should be undertaken to examine the perceptions of wind energy on Prince Edward Island.

1.2. Objectives of the Study

It is important that perceptions, both positive and negative, are measured for both stakeholder groups. In particular, how are wind turbines as a physical entity regarded? Are they a blight on the landscape or does wind energy further strengthen the overall positioning of PEI as a progressive, green province? The key research objectives for this project are as follows:

1. To assess perceptions of green energy, in particular wind farms and wind energy among visitors and Islanders. In doing so, determine each stakeholders' opinions on wind energy expansion on PEI.

2. To determine perceptions of both stakeholder groups with respect to increasing the physical presence of windmills in PEI.

3. With respect to the second objective, where would it be "acceptable" to increase the number of wind farms on PEI?

4. To determine what impact wind energy expansion will have on the PEI tourism brand.

2. METHODOLOGY

2.1. Data Collection

The survey used for this research project was developed by the Tourism Research Centre (TRC), in consultation with Tourism PEI. The survey was tested twice and, based on the comments received from the surveyors and respondents, was revised to meet the survey objectives and be more user-friendly. The final version of the survey is provided in Appendix A. Three methods were used implement the survey.

First, the TRC has developed a proprietary on-line panel of individuals who have visited PEI at least once in the past five years. Residents of PEI are not included in the panel. This is a branded panel; it is comprised of travellers who opted to join the panel. They are aware that the data is being collected by the TRC on behalf of the Province of PEI.

The panel portion of the survey was conducted from August 5 to August 13, 2008. In total, 7,362 panel members were invited to complete the survey through an e-mail request. A reminder e-mail was sent on August 12 to panel members who did not start the survey. Overall, 2,0023 panel members started the survey while 1,612 surveys were completed. Of these, 403 were completed by panel members who had not visited PEI in the past two years (a requirement to qualify for the study) and these respondents were excluded from this study. Therefore, a total of 1,209 completed surveys are used for this study.

Second, a paper-based survey of both visitors and Island residents was used. This survey was implemented on various days over the period from July 30 to August 28. The primary locations where the survey was implemented were at various Visitors Information Centres on PEI, at the airport, and at the Wood Islands ferry. In total, 145 paper-based surveys were completed.

Third, to increase the probability of Island residents completing the survey, a Web-based survey was developed. Roughly 1,970 e-mails were sent to Island residents requesting they complete the survey. In total, 391 Island residents started the survey, 322 finished the survey. The overall numbers of individuals who started and completed the survey by survey method and respondent type are provided in the table below.

Number of Samples collected, discarded and used for the Study

	Number of Surveys Collected	Number Discarded	Number of Surveys used for Study
Type of Survey			
Panel Survey	1,612	403	**1,209**
Online Survey	391	69	**322**
Paper-based Interview	145	0	**145**
Total	2,148	472	**1,676**
Type of Respondents			
PEI Residents	418	55	**363**
Visitors	1,730	417	**1,313**
Total	2,148	472	**1,676**

Note: Number of samples discarded includes non-resident respondents who did not visit PEI and resident respondents who did not finish the survey.

2.2. Statistical Issues

Since the results of any survey are based on a sample of the total population, there is the possibility that some sampling error is associated with the results. For this survey, samples must be drawn from two populations: visitors and Island residents. For residents, the sample size is 363. In terms of statistical accuracy, a sample of this size has a sampling error of 4.8% at a 95% confidence level. That is, if all PEI residents over 18 were surveyed, we would be 95% confident that the results presented in this report would fall within a range of plus or minus 4.8% of the results of surveys of all residents. An alternative way to view this statistical concept is that if the same survey were conducted 100 times, the results in this report would fall within a range of plus or minus 4.8%, 95 times out of the 100 times the survey was conducted.

For visitors, the sample size is 1,313. In terms of statistical accuracy, a sample of this size has a sampling error of 2.7% at a 95% confidence level.

2.3. Sample Characteristics

The demographic characteristics of the survey respondents are provided in the following table. Note that results for both visitors and Island residents are provided. Some of the key results are as follows.

Consistent with many other survey results, more females than males responded to the survey. These respondents are primarily married and in the 35 to 64 age bracket. A similar result applies for residents, with the exception that a much larger percentage of the respondents are in the 25 to 34 age bracket. In terms of employment status, visitors are either working full-time or are retired. For residents, about three-quarters are working full-time, very few are retired. While the visitors who responded to the survey are highly educated with 67.5% having at least graduated from a post-secondary institution, Island resident are even more highly educated with 75.6% having at least graduated from a post-secondary institution.

Household incomes are fairly evenly dispersed with the peak for both visitors and residents occurring in the $40,000 to $80,000 range. Slightly more Island residents report incomes of less than $40,000 while slightly more visitors report incomes of more than $100,000.

About 80% of the visitors are from other Canadian provinces, 17% are from the US, while 3.3% are from International countries. As a result, for this survey, US visitors are over-represented while Canadian and International visitors are under-represented when compared to the following mix of all visitors to PEI: 85% Canadian, 10% US, and 5% international. These numbers are based on the 2007 Exit Survey results.

Demographic Characteristics of Respondents

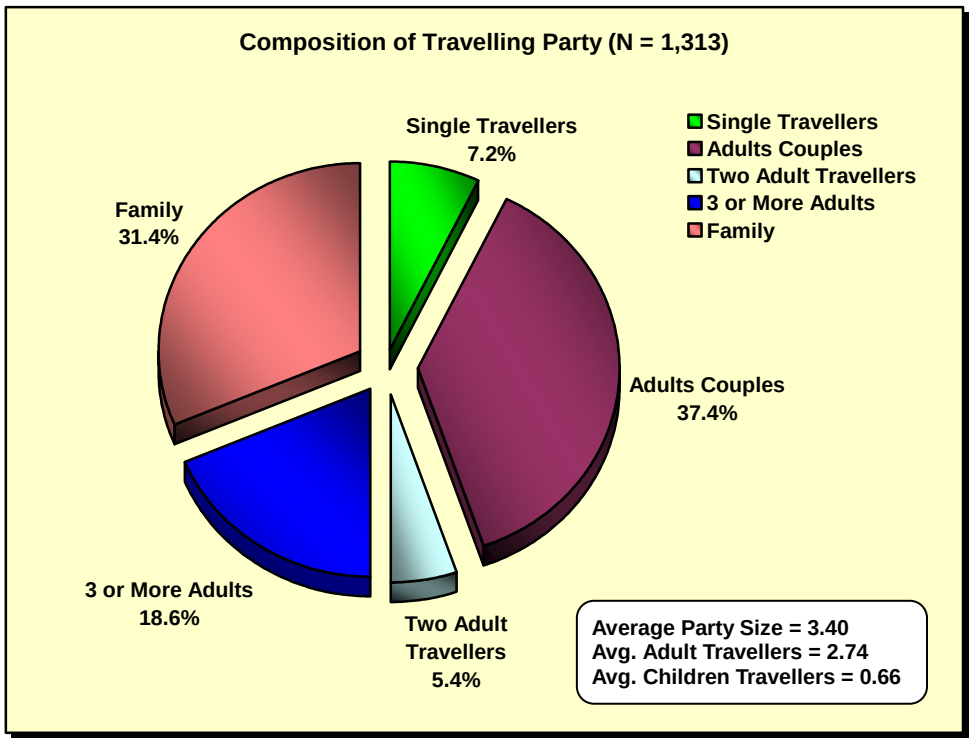
	Visitors (N = 1,313)		Residents (N =363)		Total (N = 1,676)	
Gender						
Male	514	39.4%	147	44.8%	661	40.5%
Female	790	60.6%	181	55.2%	971	59.5%
Marital Status						
Married / living common-law	1,042	80.2%	230	69.9%	1,272	78.1%
Single (never married)	130	10.0%	62	18.8%	192	11.8%
Widow/widower	24	1.8%	5	1.5%	29	1.8%
Divorced or separated	91	7.0%	26	7.9%	117	7.2%
Other	13	1.0%	6	1.8%	19	1.2%
Age						
18 to 24	17	1.3%	33	10.1%	50	3.1%
25 to 34	151	11.6%	68	20.7%	219	13.4%
35 to 44	250	19.2%	59	18.0%	309	19.0%
45 to 54	375	28.8%	86	26.2%	461	28.3%
55 to 64	354	27.2%	65	19.8%	419	25.7%
65 to 74	137	10.5%	11	3.4%	148	9.1%
75 and over	17	1.3%	6	1.8%	23	1.4%
Employment Status						
Working full time	754	58.0%	247	75.1%	1,001	61.4%
Working part time	107	8.2%	13	4.0%	120	7.4%
Working seasonally	9	0.7%	13	4.0%	22	1.4%
Unemployed	13	1.0%	15	4.6%	28	1.7%
Retraining or upgrading	32	2.5%	23	7.0%	55	3.4%
Retired	279	21.5%	3	0.9%	282	17.3%
Homemaker	74	5.7%	0	0.0%	74	4.5%
Student	14	1.1%	3	0.9%	17	1.0%
Other	18	1.4%	12	3.6%	30	1.8%
Education Level						
Less than High School	17	1.3%	6	1.8%	23	1.4%
High School Diploma	168	13.0%	23	7.0%	191	11.8%
Some post-secondary	235	18.2%	51	15.5%	286	17.7%
Graduated community/Technical college	294	22.8%	87	26.4%	381	23.5%
Graduated university (undergraduate)	331	25.6%	86	26.1%	417	25.7%
Post graduate degree/Professional designation	246	19.1%	76	23.1%	322	19.9%
Household Income						
Under $20,000	21	2.0%	16	5.8%	37	2.8%
$20,000 to $39,999	115	10.8%	35	12.8%	150	11.2%
$40,000 to $59,999	210	19.8%	48	17.5%	258	19.3%
$60,000 to $79,999	217	20.5%	53	19.3%	270	20.2%
$80,000 to $99,999	186	17.5%	40	14.6%	226	16.9%
$100,000 to $124,999	148	13.9%	42	15.3%	190	14.2%
$125,000 to $149,999	62	5.8%	18	6.6%	80	6.0%
$150,000 to $174,999	43	4.1%	11	4.0%	54	4.0%
$175,000 to $199,999	17	1.6%	2	0.7%	19	1.4%
$200,000 to $224,999	14	1.3%	3	1.1%	17	1.3%
$225,000 to $249,999	5	0.5%	1	0.4%	6	0.4%
$250,000 or more	23	2.2%	5	1.8%	28	2.1%
Origin of Country						
Canada	1,048	79.8%	363	100.0%	1,411	84.2%
United States	222	16.9%	0	0.0%	222	13.2%
International	43	3.3%	0	0.0%	43	2.6%

3. GENERAL TRAVEL DATA FOR VISITORS

The following three sections provide results that **apply only to visitors to PEI**. These results indicate the composition and size of the travel party, the type of visitation, and the areas visited while on PEI. This information relates to the last trip the respondent took to PEI.

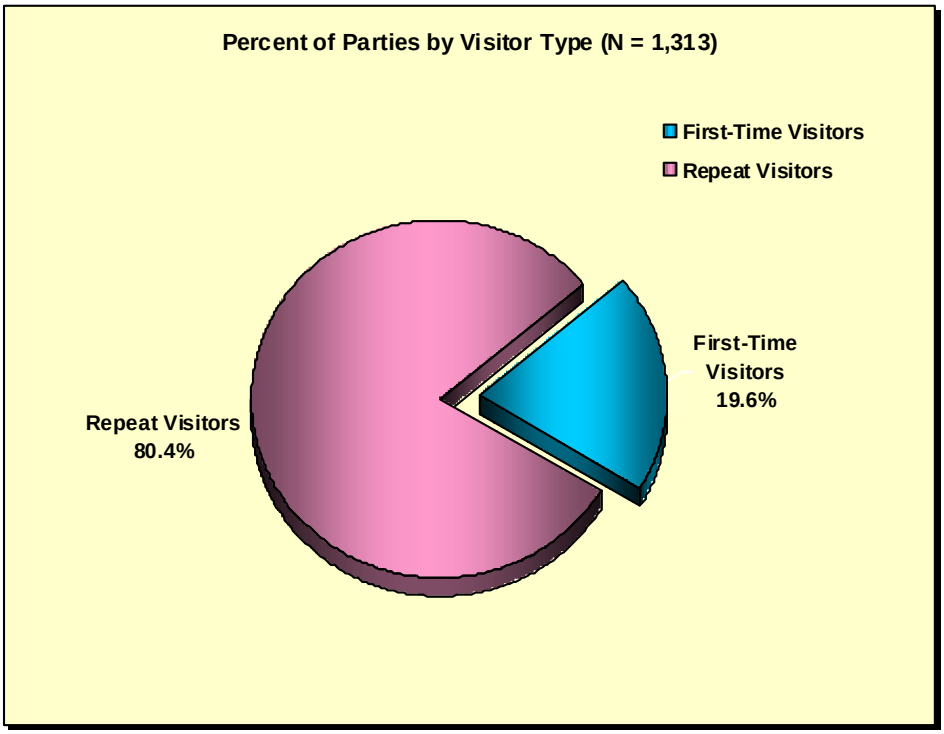
3.1. Composition and Size of Travel Party

The mix of travel parties answering this survey are very comparable to the travel parties that visit PEI, based on the results for the 2007 Exit Survey. The two exceptions are that there are relatively fewer adult couples (6.8% fewer for this survey), but more 3 or more adult parties (6.5% more for this survey). In addition, the average party size is 0.4 persons more than results for the Exit Survey.



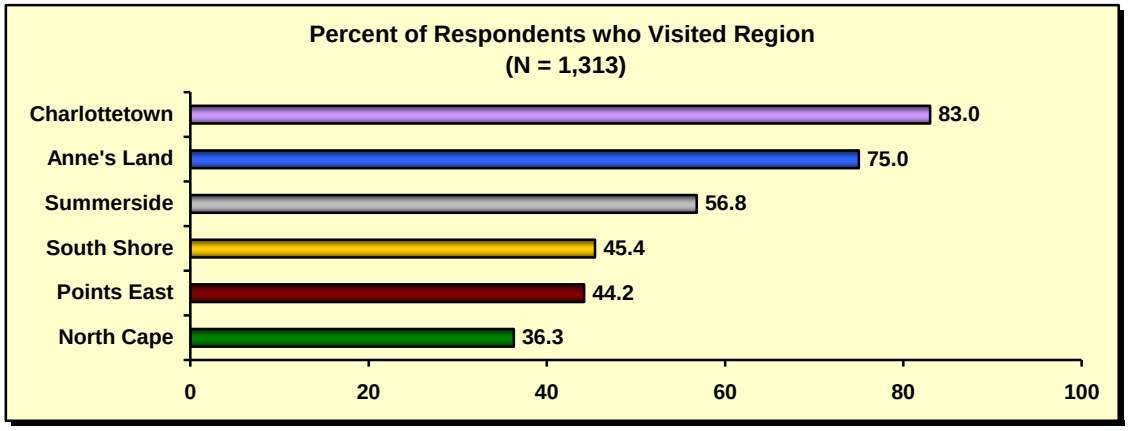
3.2. Type of Visitation

In the 2007 Exit Survey, 27% of respondents were visiting for the first time. For this survey the figure is slightly lower. This is due to the characteristics of the panel; having visited PEI is a condition of being a member of the panel.



3.3. Regions Visited While on PEI

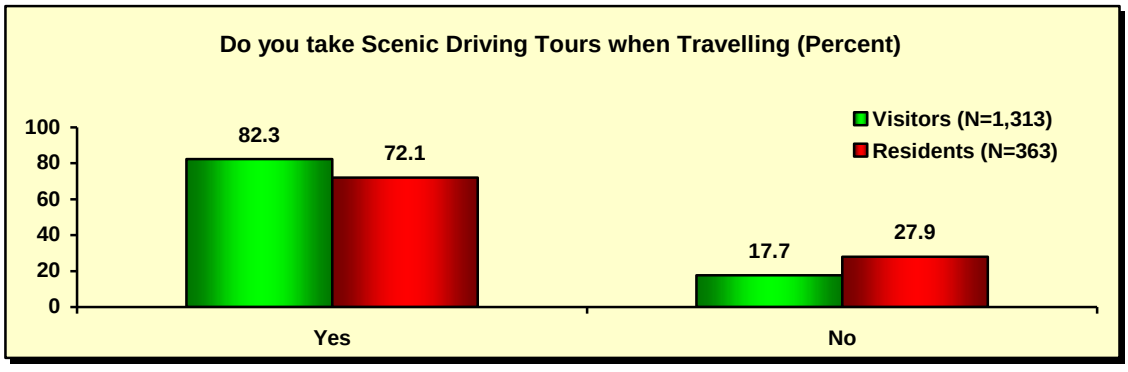
Consistent with the results of the Exit Survey, Charlottetown and Anne's Land are the two most popular areas to visit while on PEI. Fewer visitors travel to the eastern and western regions of PEI. Since these are the locations on PEI where the wind farms are located, it is expected that a bare majority, at best, would have seen a wind farm on PEI.



4. PROPENSITY FOR TAKING SCENIC DRIVING TOURS

Q: When you travel, do you normally take driving tours to view the scenery and to see the destination?

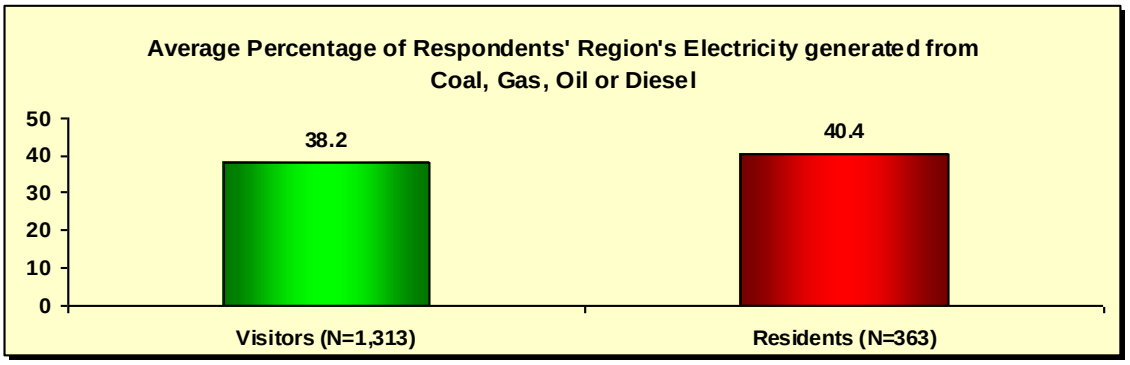
Visitors are more likely to take scenic drives when visiting a destination compared to residents. The very high percentage of both visitors and residents that take scenic drives is consistent with earlier research completed by the TRC. This work reported that over 80% of respondents take scenic drives when visiting a destination. This result is important as those touring an area are much more likely to observe wind farms and be able to offer an opinion regarding how these farms influence their impressions of the area.



5. PERCENTAGE OF ELECTRICITY GENERATED FROM COAL, GAS, OIL, OR DIESEL

Q: There are various methods used to generate electricity. What percentage of your province's or state's or country's electricity would you like to see generated from sources such as coal, gas, oil, or diesel?

The chart provides the average response to this question. Also provided in the table is the minimum, maximum, and median response, as well as the standard deviation of the responses. The results indicate that visitors and residents both have very similar views regarding this issue. Both feel that roughly 40% of the electricity in their province/state/country should be generated by using fossil-based fuels. However, the mid range value (the median) is only 30% for visitors, 40% for residents perhaps reflecting that most electricity consumed on PEI is generated by this source.

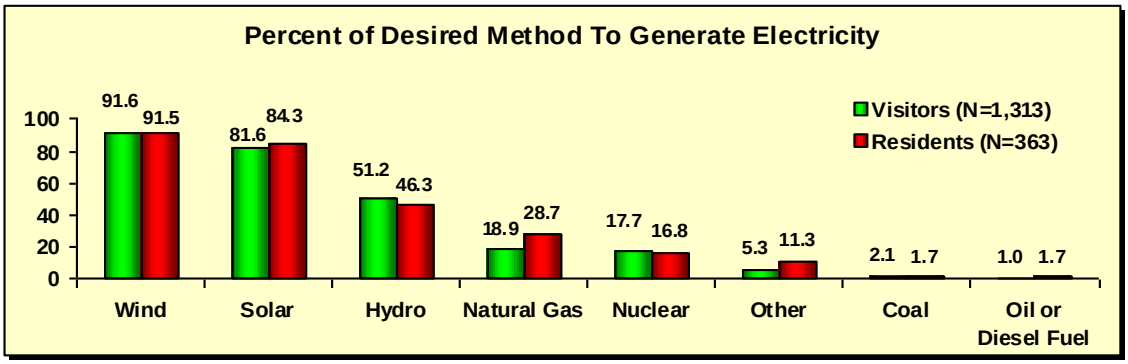


	Visitors (N = 1,313)	Residents (N =363)	Total (N = 1,676)
Mean	38.20	40.35	38.65
Std. Deviation	23.28	22.82	23.19
Median	30.00	40.00	35.00
Minimum	1	1	1
Maximum	100	100	100

6. DESIRED METHOD TO GENERATE ELECTRICITY

Q: If it were possible in your province, state, or country, which of the following would you like to see increased as a method to generate electricity?

The consistency of the results for both residents and visitors is striking. More than 9 out of 10 of both residents and visitors want to see the increased use of wind as a method to generate electricity. This is an impressive sign of support for more wind farms. At the opposite end of the scale, almost none of the respondents wanted to see the increased use of coal, oil, or diesel as a means for generating electricity.



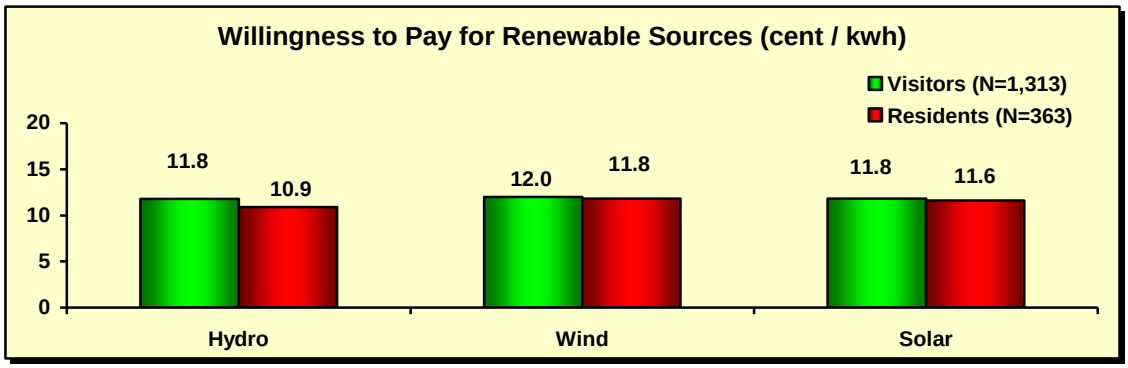
7. WILLINGNESS TO PAY FOR ELECTRICITY FROM RENEWABLE ENERGY SOURCES

Q: If in your province/state/country, the price of electricity generated by traditional methods was 10 cents per kwh, how much would you be willing to pay per kwh for electricity generated from the following renewable sources of power?

The chart provides the average response to this question. Also provided in the table is the minimum, maximum, and median response, as well as the standard deviation of the responses. The results in the previous question indicate that the vast majority of respondents want to see more electricity generated by using the wind (and other renewables). These results indicate that, on average, they are willing to pay more for energy produced by renewable sources.

For visitors, the average premium they are willing to pay for wind energy is 20%. For residents, the average premium is much less, but it is still a significant 18%. The average premium for solar, which is also a highly desired method to use to generate electricity, is lower at 18% and 16%, respectively. Only about half of the respondents wanted to see the increased use of hydro power, but they are willing to pay an average premium of 18% and 9%, respectively.

However, these mean results should be interpreted with some caution as the mid-range response (the median) is only 10 cents. That is, over half of the respondents were only willing to pay the same rate for the various types of renewable energy as the rate paid for traditional methods. While some respondents are willing to pay more (some much more), the majority are not.



	Visitors (N = 1,313)	Residents (N =363)	Total (N = 1,676)
Hydro			
Mean	11.79	10.89	11.61
Std. Deviation	8.44	5.06	7.86
Median	10	10	10
Minimum	0.05	0.25	0.05
Maximum	100.00	60.00	100.00
Wind			
Mean	12.00	11.83	11.97
Std. Deviation	8.12	7.69	8.03
Median	10	10	10
Minimum	0.02	0.25	0.02
Maximum	100.00	80.00	100.00
Solar			
Mean	11.82	11.63	11.78
Std. Deviation	8.04	6.39	7.73
Median	10	10	10
Minimum	0.02	0.25	0.02
Maximum	100.00	70.00	100.00

8. IMPRESSIONS OF FOSSIL BASED METHODS

Q: Using fossil-based fuels (e.g., coal, gas, oil) is one way to generate electricity. What words come to mind when you think about fossil-based fuels as an electricity generation method?

The verbatim responses to this question are provided in Appendix B. Note that there are 17 pages of responses divided into three columns. By far the most common responses are pollution, dirty, expensive, running out, and non-renewable. A review of the comments in the Appendix makes it clear that the vast majority of the respondents to the survey have very negative opinions of coal, gas, and oil as a method to generate electricity. This is the case even though about 63% of the electricity used in North America is generated by using coal, oil, or natural gas.

9. IMPRESSIONS OF WIND POWER

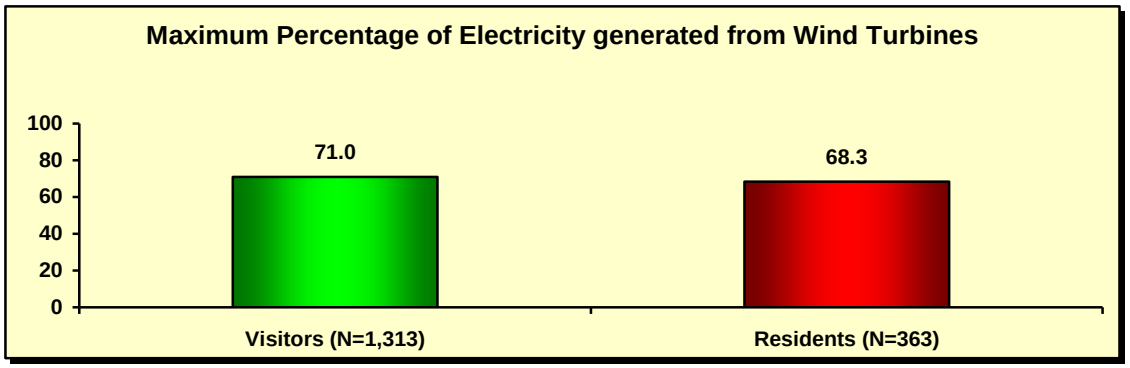
Q: Wind turbines are one way to generate electricity. What words come to mind when you think about wind turbines as an electricity generation method?

The verbatim responses to this question are provided in Appendix C. Note that there are 19 pages of responses divided into three columns.. By far the most common responses are clean, renewable, unlimited, safe, and environmentally friendly. A review of the comments in the Appendix makes it clear that the vast majority of the respondents to the survey have very positive opinions of wind as a method to generate electricity. However, there are some negative comments, particularly from residents. These comments primarily concern issues surrounding the perceived negative effects of power distribution, noise, reliability, the "ugly" appearance of wind turbines, the lack of land for wind farms, the high cost, and bird kills.

10. PERCENTAGE OF ELECTRICITY GENERATED FROM WIND TURBINES

Q: As you may be aware, PEI has started to use wind turbines to generate a significant amount of electricity. What is the maximum percentage of electricity that PEI should generate using wind turbines?

The chart provides the average response to this question. Also provided in the table is the minimum, maximum, and median response, as well as the standard deviation of the responses. The results indicate that visitors and residents both have very similar views regarding this issue. Both feel that roughly 70% of the electricity on PEI should be generated by using the wind. In addition, for both types of respondents, the median is even higher at 75%.

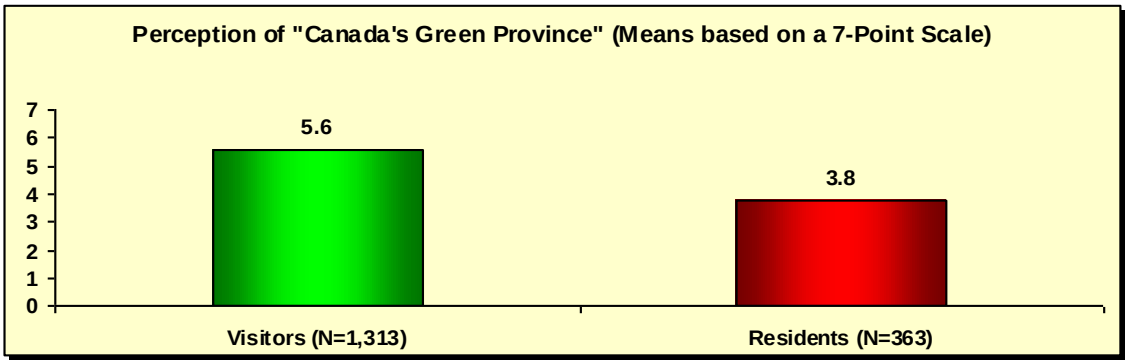


	Visitors (N = 1,313)	Residents (N =363)	Total (N = 1,676)
Mean	71.00	68.31	70.47
Std. Deviation	25.49	27.83	25.89
Median	75.00	75.00	75.00
Minimum	2	10	2
Maximum	100	100	100

11. PERCEPTION OF PHRASE "CANADA'S GREEN PROVINCE"

Q: PEI has started to use the phrase "Canada's Green Province" on license plates and in promotional material for the province. On a scale of 1 to 7, how accurately would you say this statement represents PEI?

Clearly, there is a major disconnect between residents and visitors regarding this issue. While over 83% of visitors feel this statement is either accurate or very accurate, only 30% of Islanders feel the same way. In addition, 37% of residents feel this statement is not accurate or not at all accurate. Only 7% of visitors feel this way.

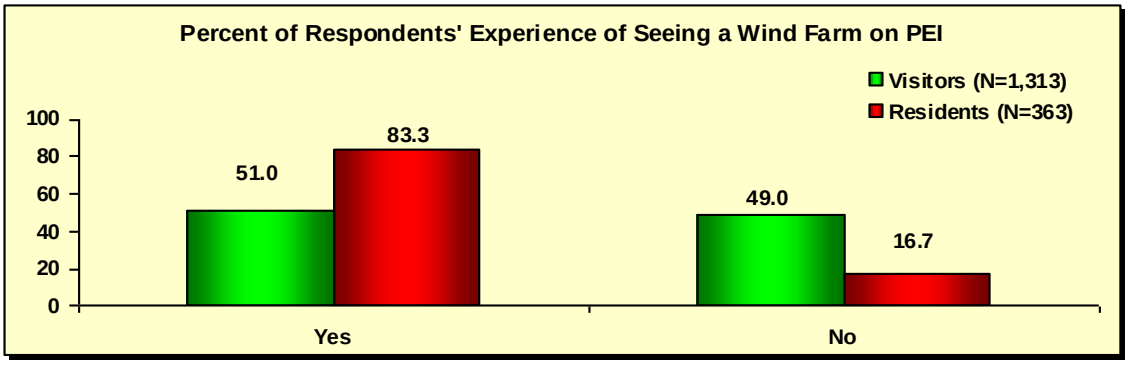


	Visitors (*n*=1,313)	Residents (*n*=363)
Not at all Accurate (1)	1.6%	10.2%
Not Accurate (2-3)	5.3%	26.8%
Somewhat Accurate (4)	9.9%	33.2%
Accurate (5-6)	53.3%	26.5%
Very Accurate (7)	29.8%	3.4%

12. SEEING A WIND FARM ON PEI

Q: Wind turbines are usually grouped to create wind turbine "farms". These wind farms may have 15 to 20 turbines spread over 40 acres of land. Have you ever seen a wind farm on PEI?

As was suggested in the discussion in Section 3.3, only a slim majority of visitors have seen a wind farm on PEI. In contrast, over 83% of residents have seen a wind farm. A follow-up question asked where the respondent saw the wind farm; Appendix C provides the verbatim responses. Most respondents correctly highlight North Cape as one of the locations of a wind farm. Many other respondents also correctly stated either East Point or West Cape.



13. ATTITUDES TOWARD WIND FARMS ON PEI

Q: Here are some pictures of wind farms on PEI. After reviewing these pictures and thinking of any wind farms that you may have seen on PEI or elsewhere, please provide your level of agreement or disagreement with each of the following statements. Note that 1 is strongly disagree, and 7 is strongly agree.

There is a great deal of consistency between the answers of residents and visitors to these statements. Note the very high percentage of both sets of respondents who strongly agree with statements d through g. Also, the highest mean response for residents is to statement g, "There should be more wind farms on PEI." For visitors, this is the fourth highest rated item; however, the mean response to statements d, e, f, and g are all very comparable. Based on the responses to statements a and c it can also be concluded that while respondents do not feel that "a wind farm adds to the attractiveness of the area it is based", they also think that wind farms do not "ruin the view in the areas they are based." Finally, over 80% of both sets residents and visitors strongly disagree with the statement that "wind farms are a poor use of PEI's land base."

Attitudes toward Wind Farms on PEI

	Visitors (*n*=1,313)						Residents (*n*=363)					
	1	2	3	4	5	Mean	1	2	3	4	5	Mean
a. I feel a wind farm adds to the attractiveness of the area it is based.	8.8%	20.6%	25.9%	31.9%	12.9%	**4.29**	10.1%	17.5%	27.9%	32.2%	12.3%	**4.30**
b. I feel wind farms should be "off-the-beaten track," well away from areas where people would generally visit.	17.1%	33.8%	17.6%	21.5%	10.0%	**3.58**	13.4%	29.0%	21.3%	20.7%	15.5%	**3.96**
c. Wind farms ruin the view in the areas they are located.	23.3%	39.8%	16.4%	15.4%	5.1%	**3.04**	24.2%	38.0%	15.3%	16.6%	5.8%	**3.12**
d. The PEI Provincial government should encourage the development of wind farms by providing permits to developers.	2.4%	4.3%	8.9%	41.8%	42.7%	**5.82**	6.1%	3.9%	12.3%	42.9%	34.8%	**5.51**
e. Wind farms put PEI on the forefront of the green energy movement.	1.5%	2.8%	9.3%	45.7%	40.8%	**5.88**	3.4%	7.8%	13.8%	46.9%	28.1%	**5.40**
f. The PEI Provincial government should financially support the development of wind farms.	1.8%	4.5%	9.6%	39.8%	44.3%	**5.88**	6.5%	8.0%	11.4%	39.8%	34.3%	**5.36**
g. There should be more wind farms on PEI.	2.5%	4.3%	10.7%	41.5%	41.0%	**5.77**	5.0%	3.7%	11.2%	43.3%	36.8%	**5.63**
h. Wind turbines are too noisy and should not be situated close to housing.	15.4%	30.2%	15.7%	26.1%	12.6%	**3.84**	11.0%	25.1%	19.8%	29.3%	14.8%	**4.19**
i. Wind farms are an attraction for visitors to PEI.	7.3%	18.0%	17.8%	38.6%	18.2%	**4.64**	4.9%	11.0%	13.3%	47.2%	23.6%	**5.09**
j. Wind farms are an inefficient way to generate electricity when compared to conventional means.	30.6%	28.9%	8.3%	16.7%	15.5%	**3.35**	26.0%	33.3%	13.2%	14.9%	12.5%	**3.29**
k. Wind farms are a poor use of PEI's land base.	42.1%	39.7%	8.1%	6.5%	3.5%	**2.26**	36.4%	44.2%	12.1%	3.1%	4.0%	**2.34**

Note: 1 = strongly disagree (1); 2 = disagree (2-3); 3 = neither disagree nor agree (4); 4 = agree (5-6); 5 = strongly agree (7)

14. REQUEST FOR COMMENTS

The final item on the survey was a request for comments concerning wind turbines or wind farms on PEI. The verbatim responses to this question are provided in Appendix E. Note that there are 52 pages of responses with many people taking the time to write very lengthy comments. While there is no easy way to summarize all of these comments, the general conclusion that could be drawn after reading these is that many people strongly support and actively encourage the construction of more wind turbines. However, some residents and visitors do have concerns about wind farm developments on PEI.

15. CONCLUSION

The wind energy survey was implemented to capture perceptions of wind energy production and wind farms, and their perceived effects on the landscape. Do wind farms "fit" with "The Gentle Island" brand for visitors, and support the attempt to label PEI as a "Green Province?"

Overall, the report demonstrates support from both Islanders and visitors for the development of energy though renewable sources, particularly wind energy. Support for wind energy was also evident when respondents were asked what words came to mind when thinking about wind as a means to generate electricity with many respondents using words such as clean, renewable, unlimited, safe, and environmentally friendly. There is some disagreement between visitors and Islanders as to PEI's position as "Canada's Green Province". While over 83% of visitors feel this statement is either accurate or very accurate, only 30% of Islanders feel the same way. In addition, 37% of residents feel this statement is not accurate or not at all accurate. Only 7% of visitors feel this way.

Attitudes towards wind farms on PEI are quite consistent among visitors and Islanders. A very significant 82.5% of visitors and 80.1% of residents either agreed or strongly agreed that there should be more wind farms on PEI. In addition, there was strong support voiced for Provincial government support for wind farms. Overall, it appears that residents and Islanders want the province to take advantage of the opportunity to diversify the sources of the electricity used on PEI.

In conclusion, both visitors and residents support wind energy and the current focus on wind energy production on PEI. In addition, there is strong support for further development of wind energy production on PEI. Based on this research, it appears that wind farms "fit" with "The Gentle Island" brand for visitors, and support the attempt to label PEI as a "Green Province," at least among visitors. However, there is a minority that express apprehension over wind farms, specifically their production of noise, effects on bird migration patterns, turbines being an eyesore, their perceived effects on health, their impact on land use, and other concerns.