Visitor Attitudes on the Environment



In 2017, Fáilte Ireland undertook significant research on visitor awareness and perceptions of the Irish landscape. Since then, the publication of the Climate Action Plan 2021 (CAP21) has increased Ireland's renewable electricity ambition to up to 80% by 2030, a substantial rise from the 70% target set out in the 2020 Programme for Government. Both policy frameworks commit to delivering 5 GW of offshore wind capacity by 2030 and outline how Ireland can harness the long-term potential of at least 30 GW of floating offshore wind in the deeper Atlantic waters beyond 2030. In addition, EirGrid is planning for a further 2.4 GW of onshore wind generation to be in place by 2030.

As a result, there has been review and revision to update this research to determine if there has been any significant change in visitor attitudes to renewable energy infrastructure in Ireland. The research was conducted in 2025, and this paper outlines its key findings.

Fáilte Ireland

The Issue

The Irish landscape is one of the primary assets for tourism in the country and has been the cornerstone of domestic and overseas tourism marketing campaigns for decades. Visitors come to Ireland with high expectations for beautiful, untouched landscapes. In 2025, 71% of visitors surveyed rated beauty of the surrounding landscape as the most important aspect of visiting a destination/location followed by the sense of naturalness or "untouched" quality of the area at 55%. 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 achieve the target to increase the share of electricity generated from renewable sources up to 80% by 2030, an increase in the number and distribution of renewable energy infrastructure projects is inevitable. To date, wind farms while located in a wide range of landscapes, generally tend to be located in upland areas and areas close to the coast where the wind speeds are greatest and these areas also contain some of our most valuable scenic landscapes. Also, in recent years there has been an increase in the number of solar farm developments in more low-lying areas, predominantly in the southern half of the country. Offshore renewable energy (ORE) is also developing with several of the Phase One Projects in the planning system.





Background to the 2025 Visitor Research

Fáilte Ireland commissioned qualitative face-to-face research with visitors in 24 locations across the country to understand perceptions of the landscape. Sites were chosen to represent situations where infrastructure and development are visible from those locations – or on route there. The piece of research took place between August – October 2025 across the Republic of Ireland.

The primary objective of this research was to assess visitors' perceptions of how Renewable Energy Infrastructure impacts and has impacted on the natural landscape, seascape character and scenery of Ireland, specifically in relation to the following five areas: Coastal, Mountain, Farmland & Parkland, Bogland, and Urban/Industrial.

A total of n=1,262 interviews were conducted as part of this research. Overseas visitors amounted to 59%, and domestic (ROI and NI) visitors made up 41% of the total sample.

The total sample size was broken down amongst the listed key five area types as follows: Coastal (n=261), Mountain (n=253), Farmland & Parkland (n=254), Bogland (n=244), and Urban/Industrial (n=250).

Awareness, Perception and Impact of Renewable Energy Infrastructure (REI)

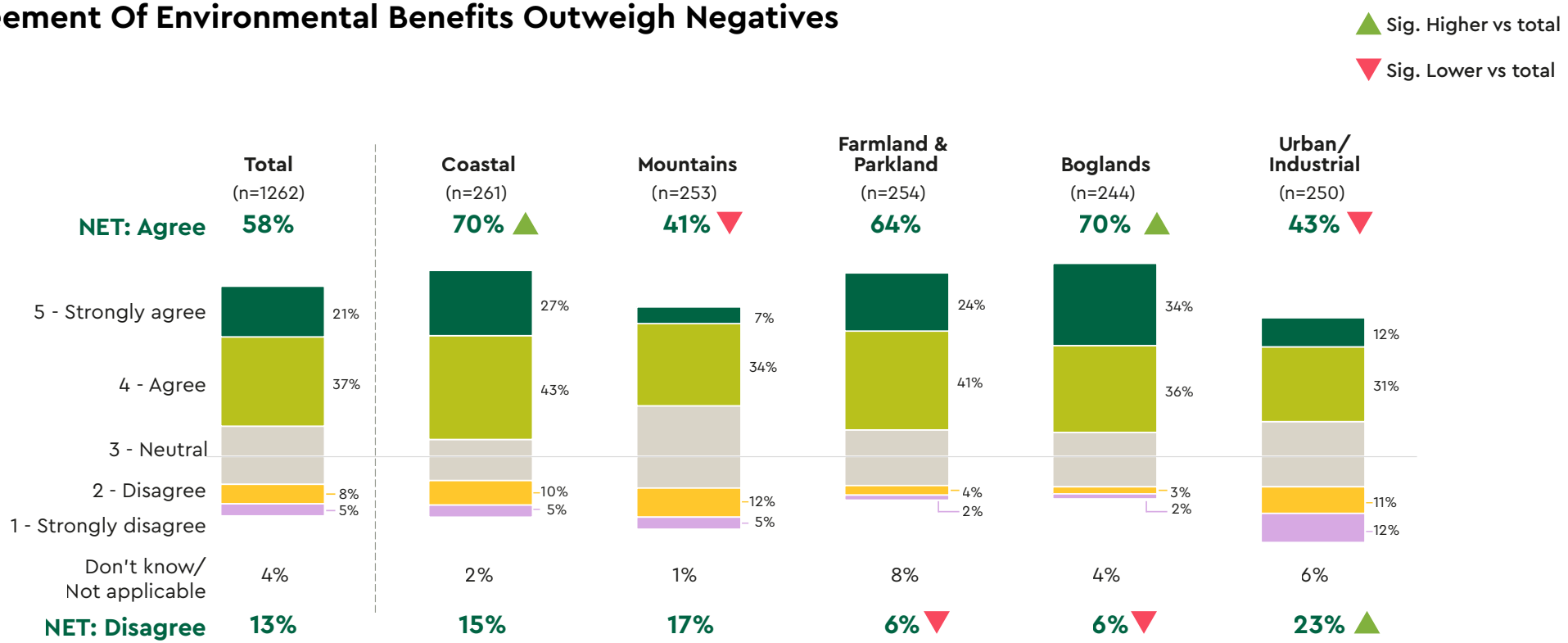
General awareness of renewable energy infrastructure is high, and highest overall amongst domestic residents. Perceptions are generally positive towards REI; both amongst domestic and overseas visitors. Low levels of negativity are recorded.

There is a strong sentiment that the benefits of renewable energy infrastructure outweigh the negatives, with 58% agreeing on this point (13% disagree). The main concerns of visitors regarding REI focus on its impact on landscape beauty, ecosystems, and agriculture.

It is generally agreed that the benefits of renewable energy outweigh the negatives, but those in Mountain and Urban areas tend to be more apathetic in this regard



Agreement Of Environmental Benefits Outweigh Negatives

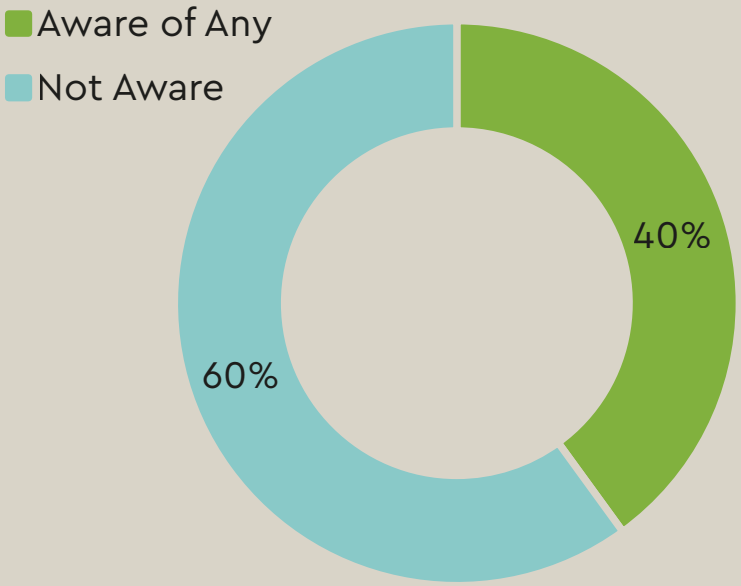


R3 "Do you believe the environmental benefits of renewable energy outweigh the possible negative impacts on the landscape?" (Base: All Visitors 18+; Aug/Oct-25, n=1262)

Despite high general awareness levels, 60% of visitors to key locations did not notice any renewable energy infrastructure during their travels. Of those who did, wind turbines/wind farms were most noticed (26%), followed by solar panels (22%) and pylons (14%). Awareness was highest in coastal areas and lowest in mountain areas.

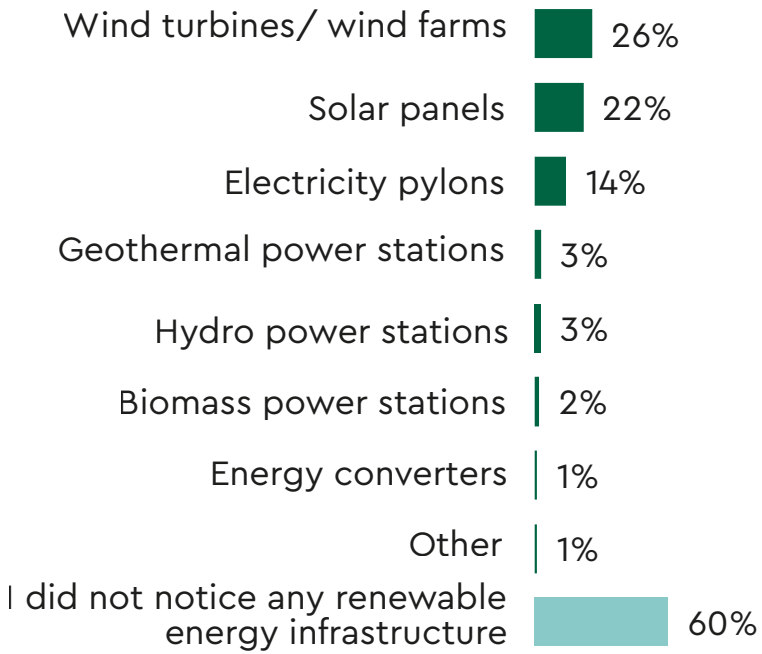
60% *of visitors did not notice any renewable energy infrastructure during their travels*

Awareness Of Renewable Energy Infrastructure



Awareness by Area Type	
Coastal	49%
Mountains	21%
Farmland & Parkland	45%
Boglands	47%
Urban/Industrial	40%

Types Of Infrastructure Aware Of



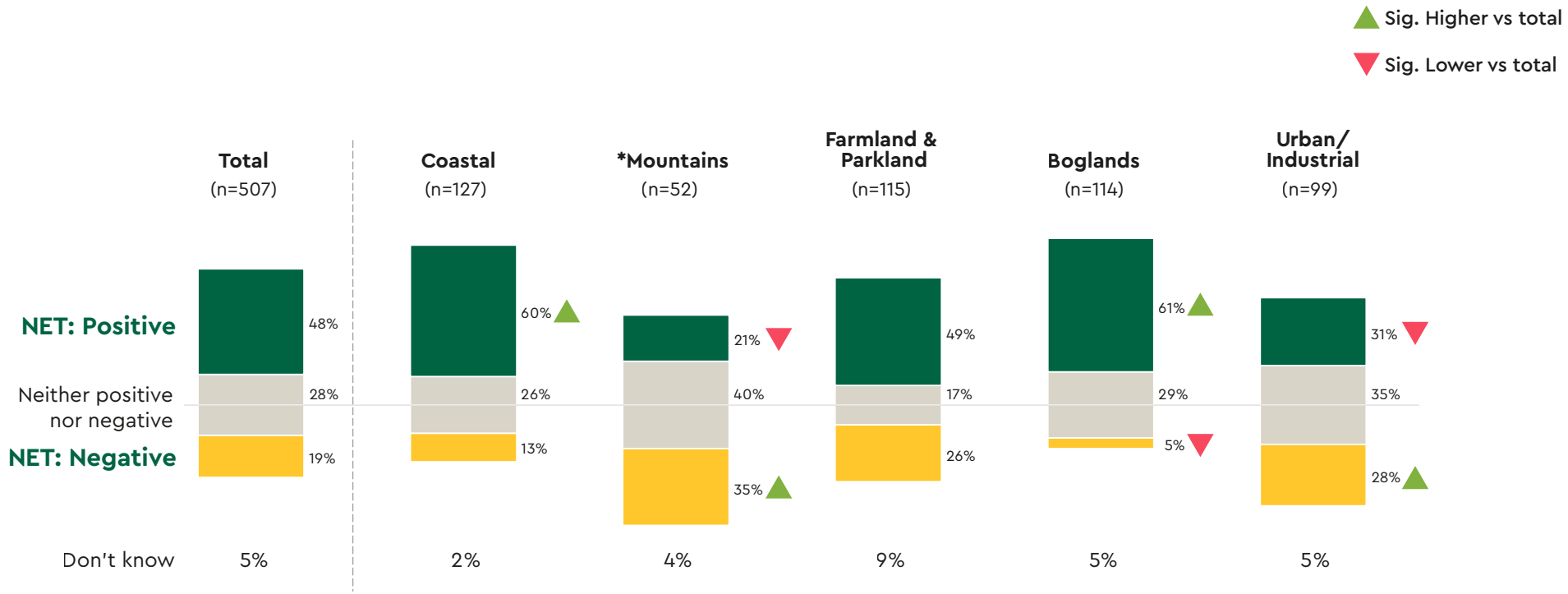
Awareness of Any REI: **40%**

Awareness of Any REI Excl. Pylons: **37%**

In general, most reactions towards REI are positive or neutral, with low levels of negativity. Those in mountain and urban/industrial areas tend to be most negative, but even then, these are in the minority. Sustainable measures at locations are appreciated and generally deemed to be positive, with just one in five citing a negative impact. Those visiting mountains and urban/ industrial areas are least positive.

Reaction Towards Renewable Energy Infrastructure

Generally positive response to REI, but those visiting Mountains and Urban areas are least positive



*Caution: Small base size

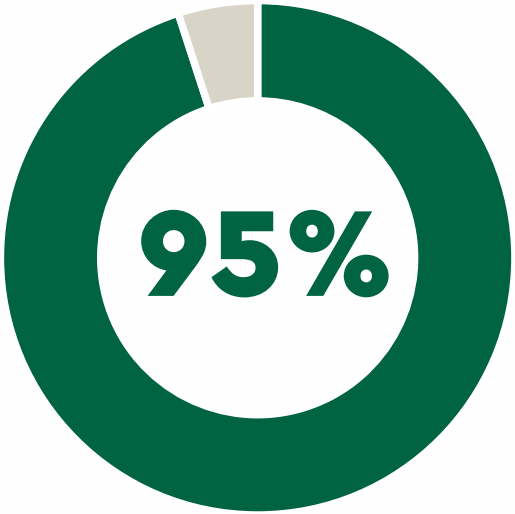
A2 "How would you describe your reaction to seeing renewable energy infrastructure in <INSERT LOCATION>?""(Base: All Visitors 18+ Aware of REI in Area; Aug/Oct-25, n=507)

The Visitor Experience

Overall visitor satisfaction and satisfaction with Irish landscapes is very high, with low levels of dissatisfaction and unmet expectations.

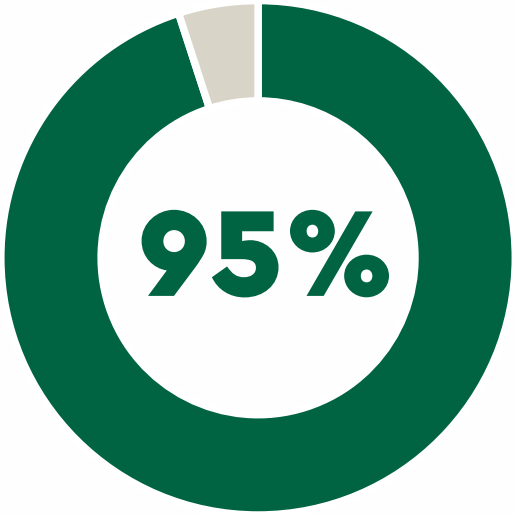
Visitor satisfaction in general and satisfaction with the beauty of the landscape is almost universal

Overall Satisfaction with Visit



Exceptionally high satisfaction levels across all area types and nationalities, with more than 9 in 10 satisfied in all cases

Satisfaction with the Overall Beauty of the Surrounding Landscape



Similarly, satisfaction with the landscape is very positive, with high levels noted at all location types and for all nationalities

E7 "And how satisfied were you overall, taking into account all aspects of your visit to <INSERT LOCATION>? "
E6 "How satisfied were you with each of the following aspects of your visit to <INSERT LOCATION>?"(Base: All Visitors 18+; Aug/Oct-25, n=1262)

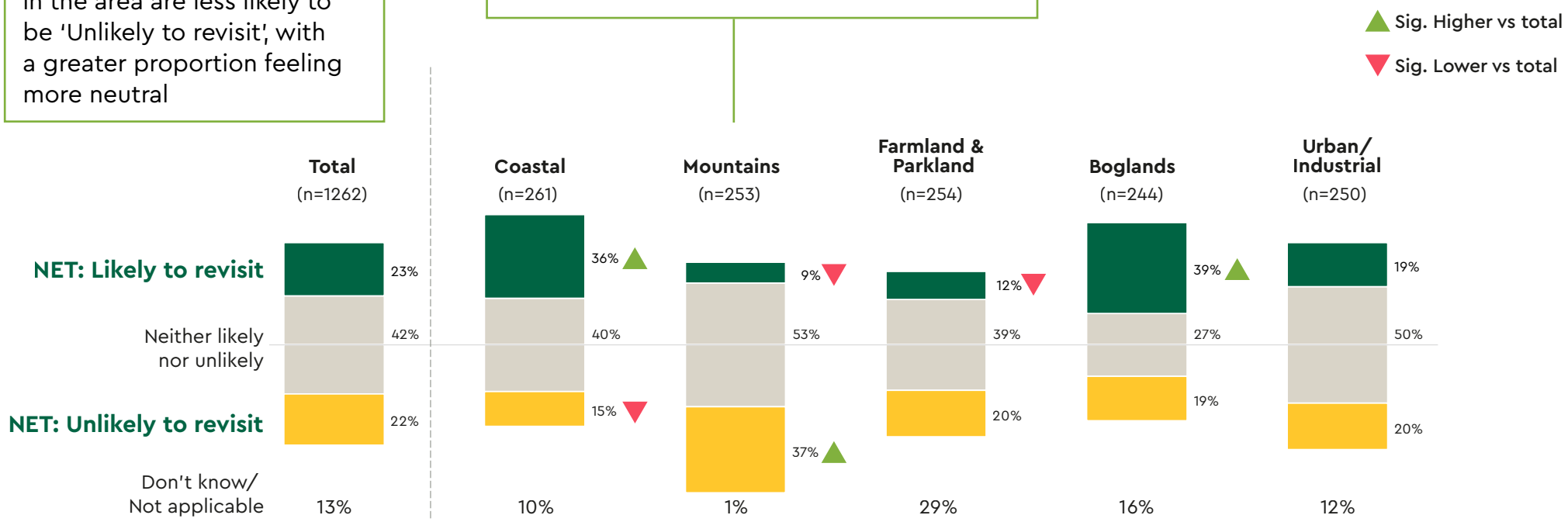
For those who noticed Renewable Energy Infrastructure at their location, six in ten claim it had no impact on their enjoyment, with more positivity than negativity evident. 9% of visitors were dissatisfied with REI at their location. Interestingly, there is a disparity between perceptions of a hypothetical presence of REI and the real thing; some negativity is aimed towards the potential inclusion of REI, but amongst those aware, there is less negativity. Four in ten report that REI had no impact (positive or negative) on their future visitation plans, with positivity and negativity more evenly split in this regard.

4 in 10 *report that REI had no impact on their future visitation plans. With high levels of neutrality, it will be important to manage the impact of REI moving forward to avoid those feeling neutral becoming negative*

Likelihood To Revisit With The Presence Of REI

Awareness of REI does not impact on 'Likely to revisit' levels, but those aware of REI in the area are less likely to be 'Unlikely to revisit', with a greater proportion feeling more neutral

Mountains are more likely to see a negative impact but also have the highest proportion claiming no impact at all

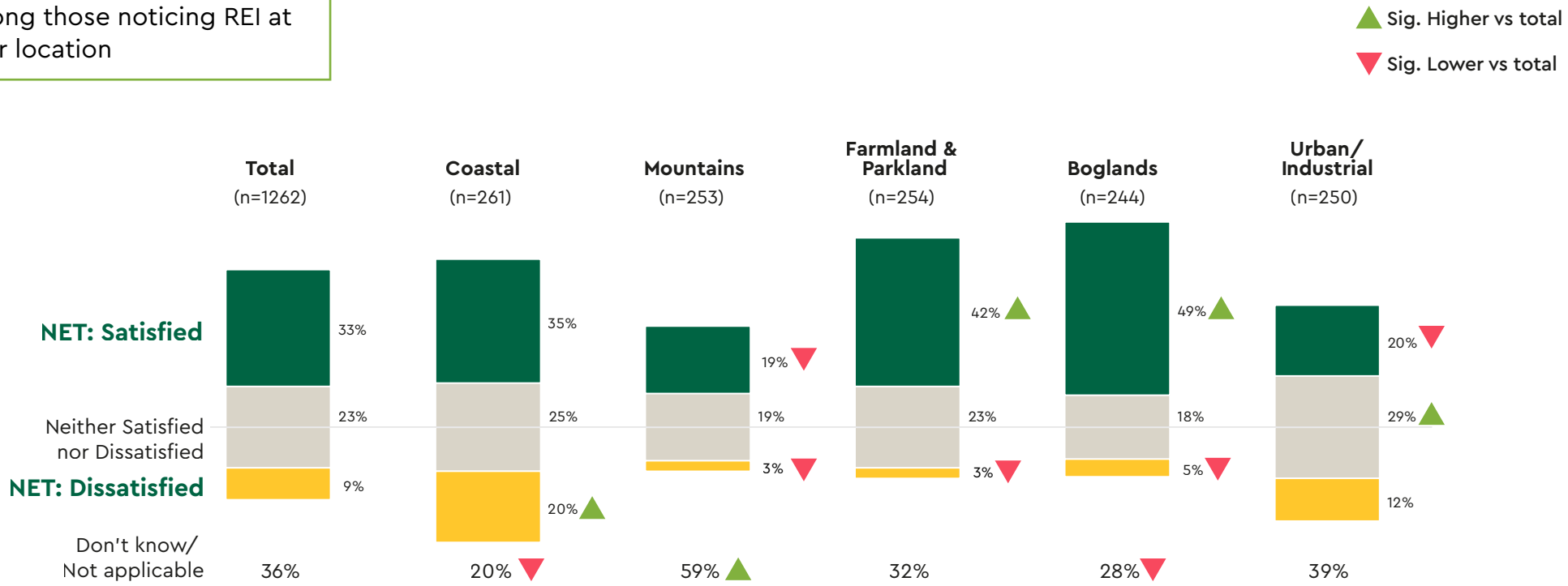


L4 "Would the presence of renewable energy infrastructure make you more or less likely to consider visiting <INSERT LOCATION> again?" (Base: All Visitors 18+; Aug/Oct-25, n=1262)

1 in 3 *are satisfied with the existence of REI, with* **3 in 5** *either neutral or unsure. A small minority are dissatisfied. Potential watch-out for Coastal areas, with dissatisfaction levels higher*

Satisfaction With Existence Of The Renewable Energy Infrastructure

Satisfaction grows to 41% among those noticing REI at their location



E6 "How satisfied were you with each of the following aspects of your visit to <INSERT LOCATION>?"(Base: All Visitors 18+; Aug/Oct-25, n=1262)



The Challenge

The conclusions drawn from this research study in 2025 are underpinned by a large sample size to ensure statistical robustness. Furthermore, the study systematically examined a diverse and representative range of landscape types and development forms across the Republic of Ireland.

Visitors generally maintain a positive attitude towards renewable energy infrastructure; it is also important to consider that three in five remain either neutral or uncertain.

The challenge lies in achieving an appropriate balance between protecting landscape and seascape character and scenic value as key tourism assets, while also enabling the development of renewable energy. The visual impact of renewable energy infrastructure, whether actual or perceived, can lead to potential conflict among communities and stakeholders, including those within the tourism sector. People and communities often have strong emotional attachments to place, which can intensify concerns about the visual impacts associated with REI.

Key Insights of the Landscapes Visitor Research 2025:

1

There was strong awareness of the benefits of Renewable Energy Infrastructure (REI) amongst those surveyed. **'Good use of energy', 'fighting climate change'** and **'eco-friendly'** were benefits most mentioned by visitors.

2

For **two in three visitors**, Renewable Energy Infrastructure did not factor into their decision making when choosing their destination.

3

Beauty and untouched nature are top priority for visitors of all nationalities; it was **ranked #1** in all areas for enjoyment and satisfaction.

4

Among those aware of Renewable Energy Infrastructure, **61%** report **no impact** on enjoyment of landscape.

5

58% agree that the benefits are greater than the negatives of Renewable Energy Infrastructure.

6

Looking at location/area differences, the **Mountains area ranks highest** amongst visitors for mention of the negative impact of Renewable Energy Infrastructure on a landscape.

7

42% say infrastructure has **no impact** on future visits.