

The Impact of Renewable Energy Farms on Visitors to Cornwall

Final Report

Produced for and on behalf of Good Energy
by
The South West Research Company Ltd.

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The Impact of Renewable Energy Farms on Visitors to Cornwall

Key Findings



Key Findings

The vast majority of visitors to Cornwall had a positive attitude towards renewable energy (80%) with just 6% having a negative attitude towards it. Opinions towards wind farms and solar farms individually were also positive amongst visitors, although both slightly lower than the overall attitude towards renewable energy in general. The additional comments captured through the survey along with anecdotal evidence captured from interviewer de-briefings would suggest that whilst not all are in favour of wind and solar farms there is a general acceptance of the role that they have to play in protecting the environment and providing energy for the future. It was also evident that many people are now used to seeing such developments close to where they live and as such are not troubled by seeing similar sights whilst on holiday in Cornwall.

Awareness of wind farms in Cornwall was much higher than that of solar farms amongst visitors to the county. The large majority of those who were aware stated for each type that they had no impact on their visit and in each case the proportions reporting negative impacts were outweighed by those reporting positive impacts by the presence of wind and solar farms. Further analysis suggests that the strength of impact on those reporting negative impacts is not enough to deter them from visiting as many are regular visitors to the county.

Overall this report suggests that just 2% of visitors are less likely to visit the county again in the future as a result of the presence of wind and solar farms. However, 4% of visitors are more likely to visit which is likely to be as a result of those that find such developments attractive and, more importantly, those that consider the county to be a more positive place as a result of the presence of renewable energy farms and its support for the environmental causes. That said, the survey focused on visitors' attitudes in response to existing wind and solar farms and therefore no firm conclusions can be drawn as to how these might change with further developments in the future.

When put in context other factors are much more of a threat to Cornwall's visitor economy in the future than the presence of wind and solar farms. Whilst the majority of visitors will remain loyal and will not be deterred from re-visiting in the future, the risk of poor weather and the cost of holidaying in the county are far more likely to deter them to visit than the presence of renewable energy developments.

The Impact of Renewable Energy Farms on Visitors to Cornwall

Executive Summary



Executive Summary

- The South West Research Company Ltd. were commissioned by Good Energy to undertake an independent research study during summer 2013 into the attitudes of visitors to Cornwall towards wind and solar farms in the county. The survey was designed to explore visitor attitudes towards renewable energy; levels of awareness of wind and solar farms in Cornwall; and the extent to which these developments affected the visitors' enjoyment of their holidays and/or their willingness to visit again in future.
- A face to face survey was conducted by experienced interviewers at six different holiday locations in Cornwall between the 1st and 30th August 2013. A total of 1,007 questionnaires were completed.
- 80% of visitors were in favour of renewable energy as a means of generating power and on the whole thought it was a good idea whilst just 6% had a negative attitude towards it.
- 74% of visitors were in favour of wind farms as a means of generating power and on the whole thought they were a good idea. 12% of visitors had a negative attitude towards them.
- 75% of visitors were in favour of solar farms as a means of generating power and on the whole thought they were a good idea. 9% of visitors had a negative attitude towards them.
- 90% of visitors were aware of wind farms in Cornwall.
- Of those aware of wind farms, 71% said their presence had no impact on their visit to Cornwall at all, 19% indicated that they actually had a positive impact on their visit to the county and 10% said they had a negative impact on their visit.
- When those who were unaware of wind farms in the county were included in the analysis, the negative impact of wind farms on visits was further reduced to 9% of visitors.

Executive Summary

- 35% of visitors were aware of solar farms in Cornwall.
- Of those aware of solar farms, 71% said their presence had no impact on their visit to Cornwall at all, 22% indicated that they actually had a positive impact on their visit to the county and 7% said they had a negative impact on their visit.
- When those who were unaware of solar farms in the county were included in the analysis, the negative impact of wind farms on visits was further reduced to just 2% of visitors.
- 94% of visitors said the presence of wind and solar farms would make no difference in their decision to visit Cornwall again in the future and a further 4% indicated that their presence would actually make them more likely to visit. 2% of visitors stated that they would be less likely to visit as a result of the presence of wind and solar farms in Cornwall.
- Whilst the majority of visitors did not indicate any factors which would deter them from visiting Cornwall again in the future (69%), the risk of poor weather (17%) and cost compared to other holiday destinations (14%) were the two factors most likely to deter them to visit the county again in the future. Only 2% of all visitors indicated that the presence of wind and solar farms in Cornwall would deter them from visiting again in the future.

The Impact of Renewable Energy Farms on Visitors to Cornwall

Introduction



Background

This report presents the findings of a survey of staying visitors to Cornwall undertaken on behalf of Good Energy by The South West Research Company Ltd. during August 2013.

Good Energy are a South West Company, based in Wiltshire and were the first dedicated 100% renewable electricity supplier. They supply over 35,000 customers and support over 55,000 homes, business and communities generating their own energy, and have their own wind farm in Delabole, North Cornwall.

Good Energy were keen to commission an independent survey amongst visitors to Cornwall to explore their feelings and attitudes towards renewable energy generally as well as wind and solar farms specifically. In addition understanding visitors' current levels of awareness of existing wind and solar farm developments in Cornwall and the impact these have, if any, on their visits to the county now and in the future was a key element of the research.

Since its formation in 2008, The South West Research Company has worked with a wide ranging number of clients across the South West region covering a wide range of market research projects including visitor surveys, festival/event evaluations, marketing campaign evaluations, business monitors and economic evaluations. The business partners have, between them, over 25 years' experience in conducting and undertaking tourism-related research, with particular expertise in planning, developing and undertaking large scale visitor surveys of the nature and type which was required by Good Energy.

Research Objectives

- ✓ To gain an understanding of the attitudes that visitors to Cornwall have towards renewable energy generally and wind and solar farms specifically.
- ✓ To determine the level to which visitors are aware of existing wind and solar farms in Cornwall and whether their presence has any impact on their holiday experience.
- ✓ To determine the extent to which the presence of wind farms and solar farms might affect the willingness of visitors to return to Cornwall on holiday.
- ✓ With regards all the objectives above, the interest was in visitors' attitudes towards wind farms and solar farms separately, but not as an alternative to one another.

Methodology

A face to face survey was conducted by experienced interviewers at six different holiday locations in Cornwall between the 1st and 30th August 2013. The sample points included:

- Padstow
- Perranporth
- Tintagel/Trebarwith
- Widemouth Bay
- Newquay
- Penzance

Adults (aged 16+ yrs) who were on a holiday or leisure related visit to the county staying for at least one night were sampled on a random basis along the seafront/beach areas at each of the holiday locations above.

40 interviewing sessions, each lasting approximately 5 hours, were undertaken over the survey period.

A total of 1,007 questionnaires were completed. Where the total sample detailed in this report in the charts to follow is less than 1,007, this will be due to respondents not providing an answer to a question or where a question was only asked to a sample of the respondents dependent on their responses to a previous question.

As the statistical reliability slide overleaf demonstrates, an overall random sample of this size provides robust results and good margins of error within which one can be 95% certain that the true figures will fall. It is also comparable with the Cornwall Visitor Survey 2012 where a sample of 1,000 visitor interviews was undertaken.

Statistical Reliability

All sample surveys are subject to statistical error. The size of this error varies with the sample size and also with the order of magnitude of the research findings being considered.

The survey results in this report are presented for all visitors, along with a breakdown of the results by each of the six interview locations. The table below shows the sample achieved for all visitors and each of the interview locations and gives the margins within which one can be 95% certain that the true figures will fall (assuming the sample is random).

The figures shown are at the 95% confidence limits. Thus, for example, we can be 95% certain that, for all visitors, with a result of 50%, the true percentage is the range 46.9% to 53.1%. For the individual location results the margins of error are much wider and this should be borne in mind when interpreting the results contained in this report.

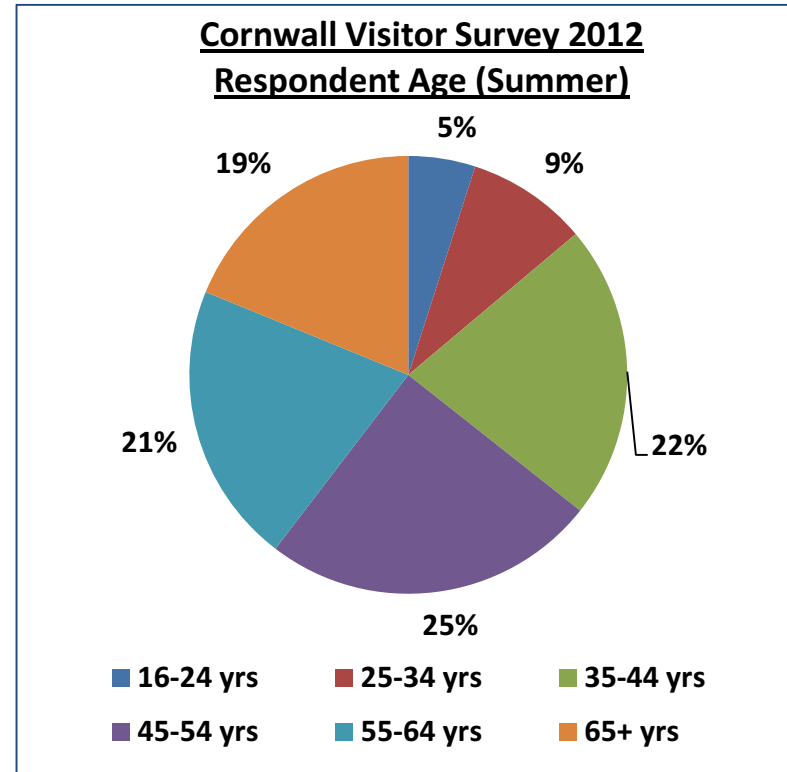
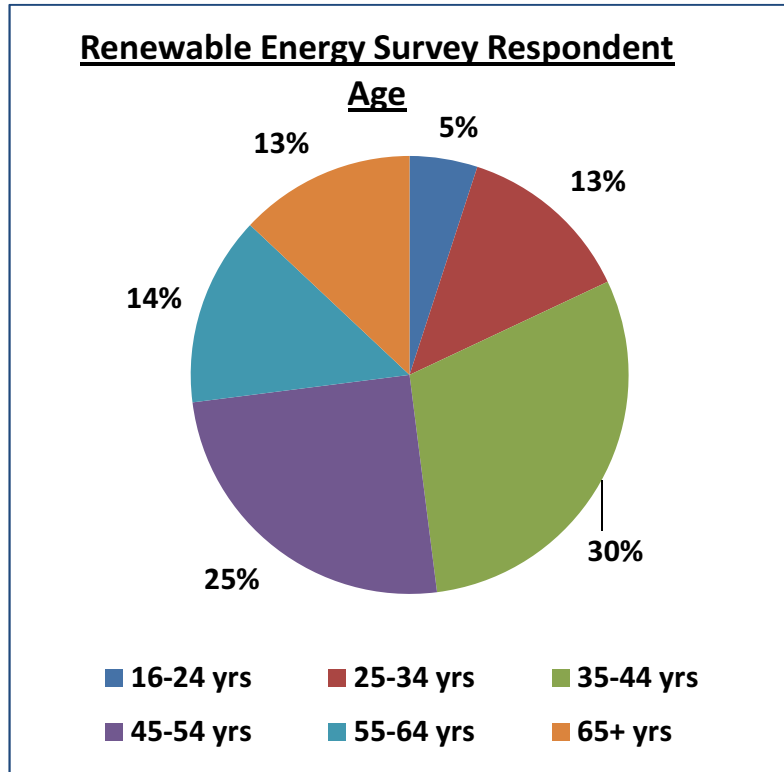
| | All visitors | Padstow | Perranporth | Tintagel/ Trebarwith | Widemouth Bay | Newquay | Penzance |
|--------------------------|--------------------------|------------------------|------------------------|-------------------------|------------------------|------------------------|------------------------|
| Research findings | Sample: 1,007 | Sample: 172 | Sample: 154 | Sample: 182 | Sample: 175 | Sample: 147 | Sample: 177 |
| 10% or 90% | +/- 1.9% | +/- 4.5% | +/- 4.7% | +/- 4.4% | +/- 4.4% | +/- 4.8% | +/- 4.4% |
| 20% or 80% | +/- 2.5% | +/- 6.0% | +/- 6.3% | +/- 5.8% | +/- 5.9% | +/- 6.5% | +/- 5.9% |
| 30% or 70% | +/- 2.8% | +/- 6.8% | +/- 7.2% | +/- 6.7% | +/- 6.8% | +/- 7.4% | +/- 6.8% |
| 40% or 60% | +/- 3.0% | +/- 7.3% | +/- 7.7% | +/- 7.1% | +/- 7.3% | +/- 7.9% | +/- 7.2% |
| 50% | +/- 3.1% | +/- 7.5% | +/- 7.9% | +/- 7.3% | +/- 7.4% | +/- 8.1% | +/- 7.4% |

The Impact of Renewable Energy Farms on Visitors to Cornwall

Sample Profile



Respondent age and gender

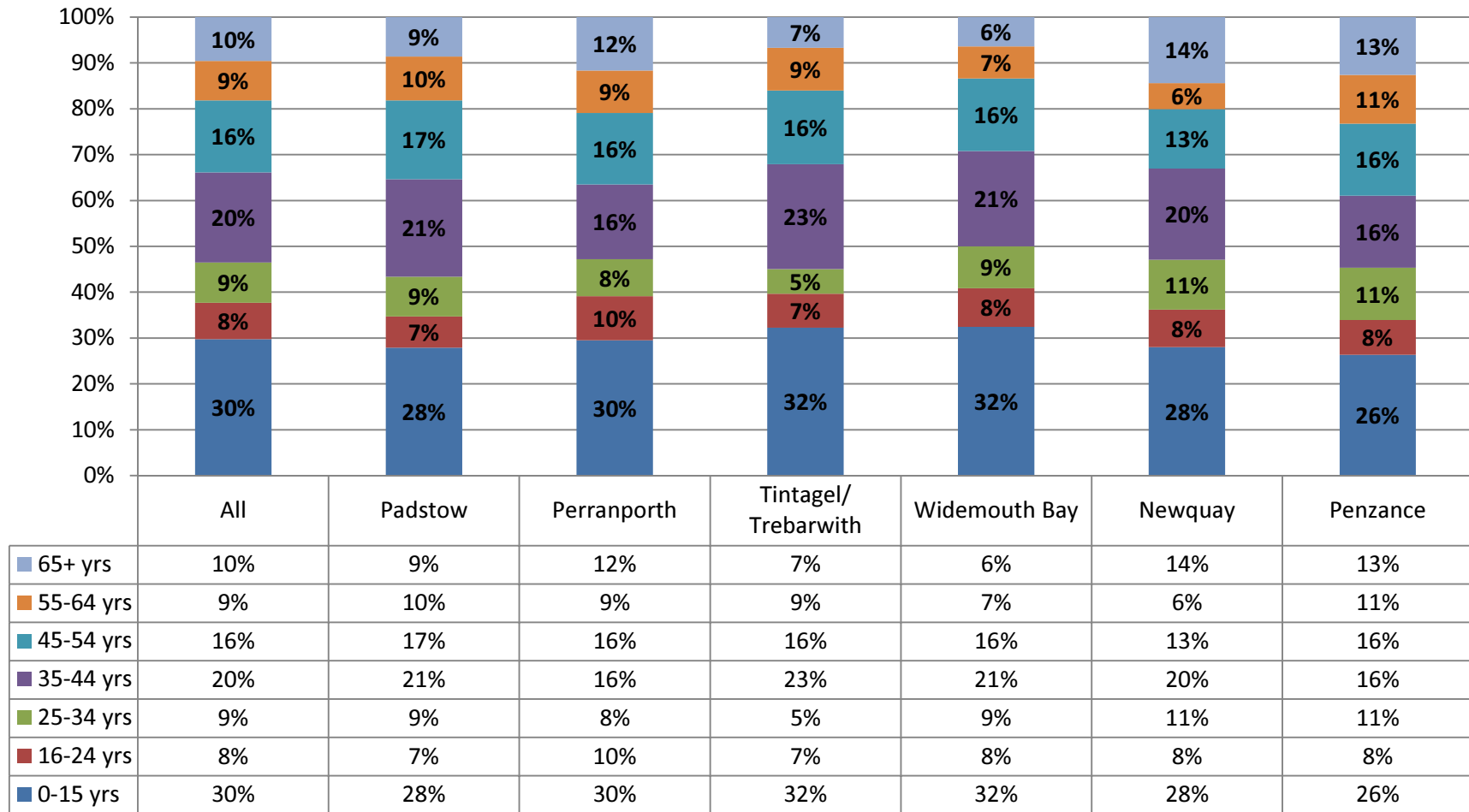


Overall, respondents were well spread across all age groups with almost half (48%) below 45 years of age. 35-44 year olds represented the largest proportion of respondents (30%), followed by 45-54 year olds (25%). 54% of respondents were male and 46% female.

For comparative purposes, the Summer respondent profile sourced from the Cornwall Visitor Survey 2012* (CVS) is also displayed. Whilst the profiles of the two surveys do not exactly match, they are broadly similar suggesting that a representative sample was obtained through the Renewable Energy Survey (RES). Whilst the RES displays a slightly younger respondent profile, this is likely to be as a result of the beach and seafront sample points used whereas the CVS Summer sample was collected from a wider range of geographical locations possibly attracting an older profile.

*Undertaken by Beaufort Research

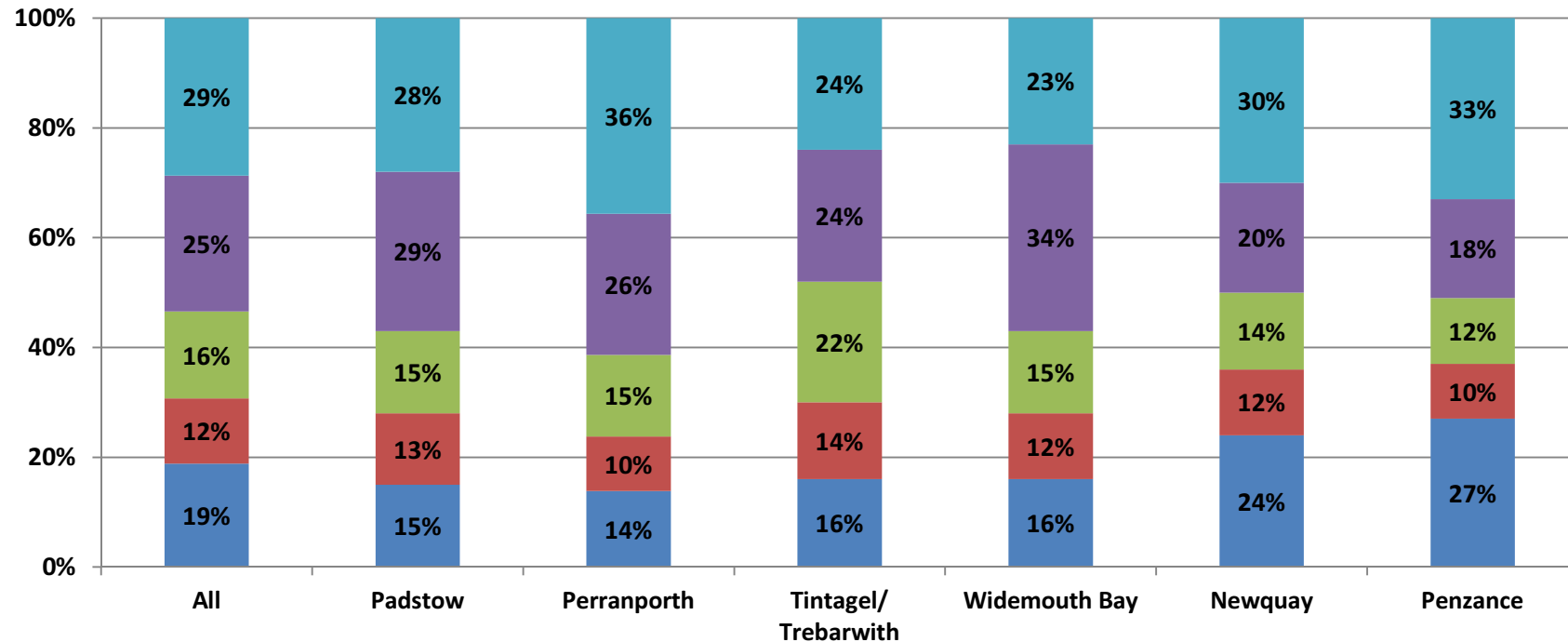
Visitor profile



The visitor profile for respondents and those in their immediate party is broadly similar across all sample points.

Unsurprisingly, considering the timing and sample points of the fieldwork, the largest proportion of visitors were in the 0-15 years age group followed by 20% in the 35-44 years age group and 16% in the 45-54 years age group. This suggests a visitor profile dominated by family visitors during the peak holiday season in the county.

Number of previous visits to Cornwall



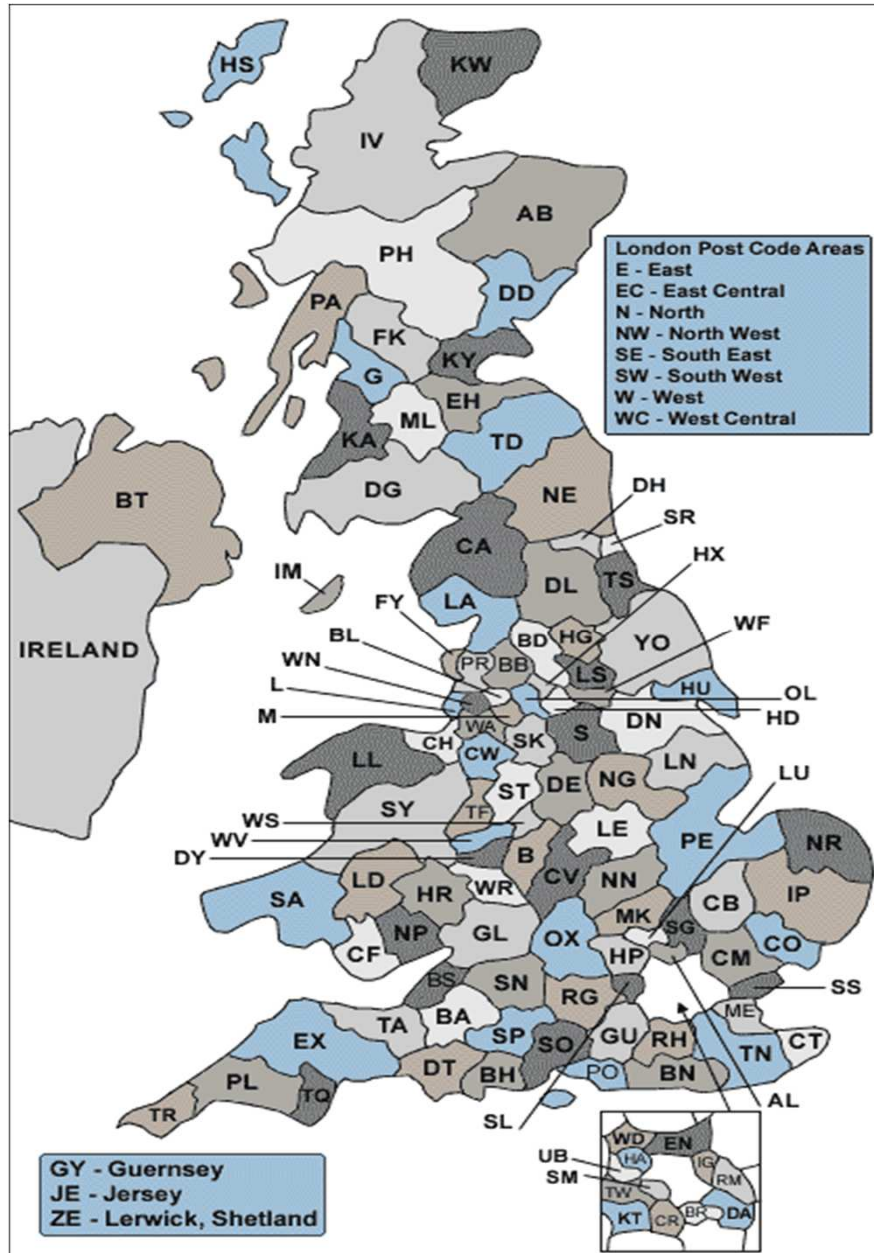
How frequently have you visited Cornwall for an overnight visit in the last five years? (1006 respondents)

■ Never - first visit ■ Once ■ Twice ■ 3-5 times ■ More than five times

Overall, respondents had previously visited Cornwall on a number of occasions in the last five years with more than half (54%) having visited more than three times. Only 19% were on their first visit in the last five years.

Across the sample points the results were broadly similar although Penzance and Newquay attracted the largest proportions of first time visitors (27% and 24% respectively) and Perranporth (62%) had the largest proportion of visitors who had visited on more than three occasions in the last five years. The results portray a large proportion of loyal visitors to Cornwall.

Respondent origins by postal code area



The table below shows the top 11 postal area origins for the full survey sample each of which accounts for more than 2% of visitors..

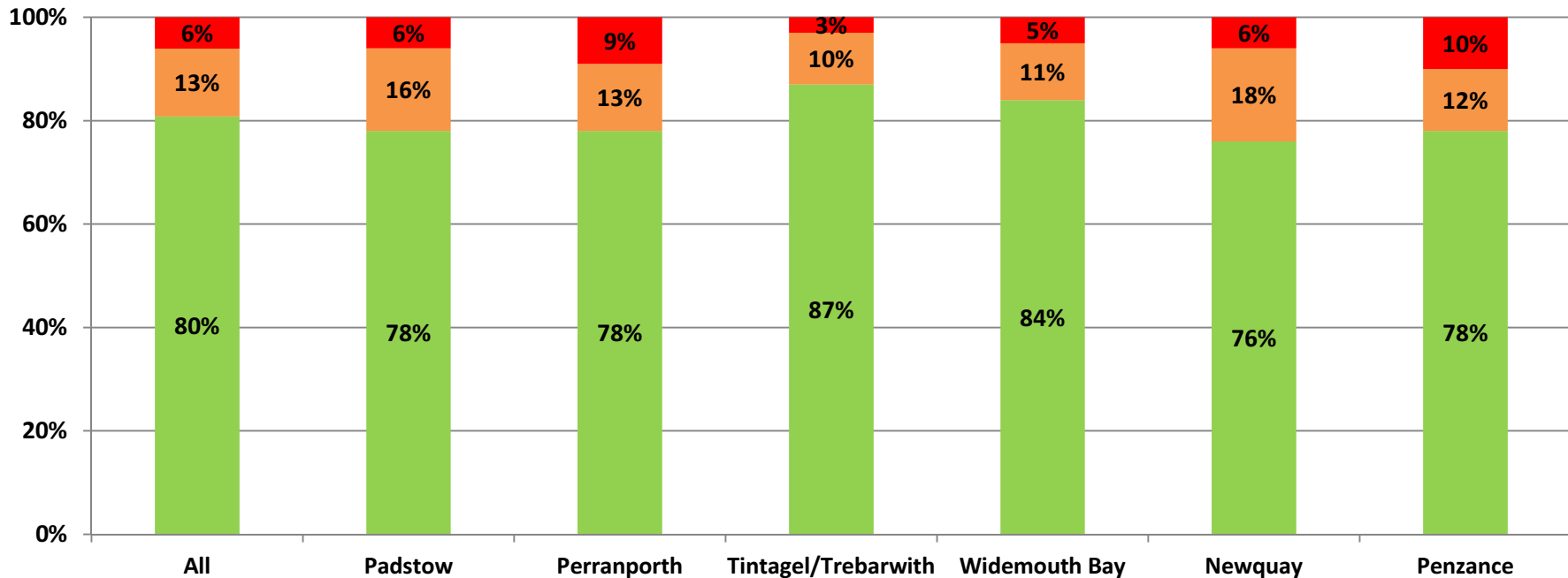
| Postal area | Area code | % |
|-------------|-----------|------|
| BIRMINGHAM | B | 4.1% |
| BRISTOL | BS | 4.0% |
| NOTTINGHAM | N | 3.5% |
| READING | NG | 3.0% |
| SHEFFIELD | RG | 2.5% |
| NORTHAMPTON | NN | 2.4% |
| BATH | BA | 2.2% |
| DERBY | DE | 2.2% |
| GLOUCESTER | GL | 2.2% |
| STEVENAGE | SG | 2.2% |
| COVENTRY | CV | 2.1% |

The Impact of Renewable Energy Farms on Visitors to Cornwall

General Feelings Towards Renewable Energy



General feelings about renewable energy



How do you feel generally about renewable energy as a means of generating power? (1005 respondents)

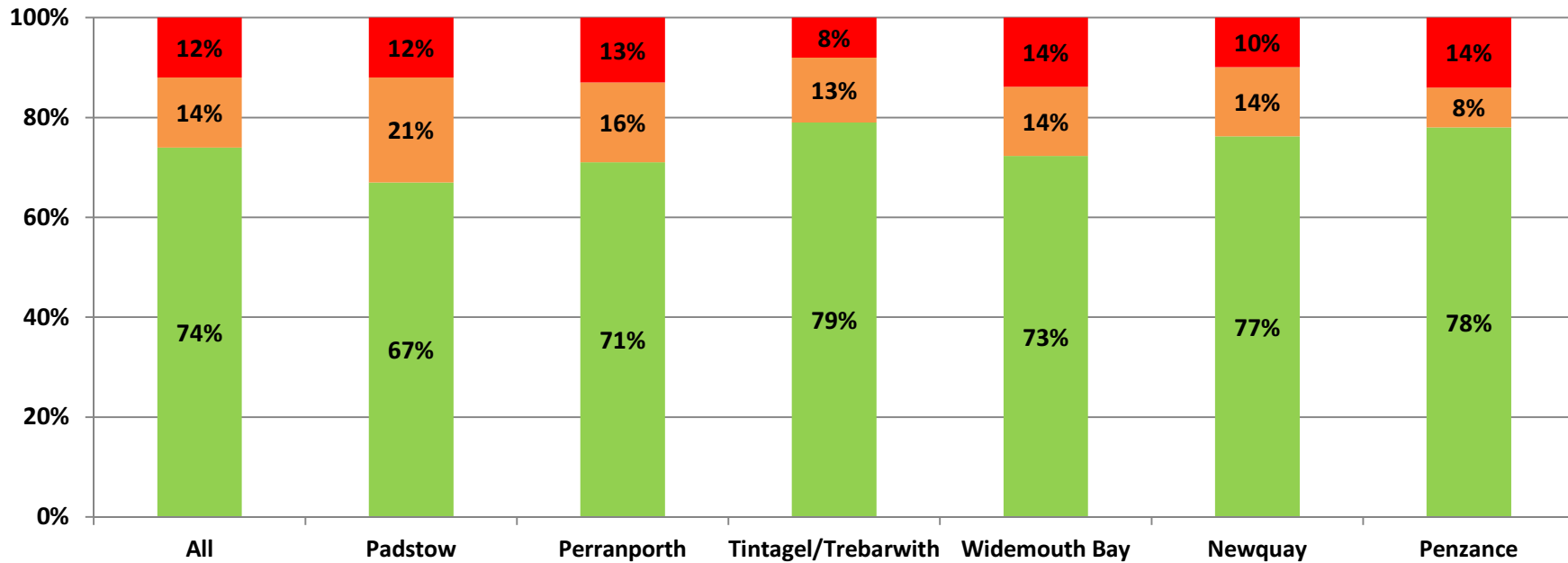
■ Generally in favour of it/on the whole a good idea
 ■ No particular opinion on it
 ■ Generally not in favour of it/on the whole a bad idea

The vast majority of visitors to Cornwall had a positive attitude towards renewable energy.

80% of visitors were in favour of it as a means of generating power and on the whole thought it was a good idea whilst just 6% had a negative attitude towards it.

Whilst there were little significant differences in the results according to interview location, visitors interviewed at Tintagel/Trebarwith and Widemouth Bay showed the highest levels of positivity towards renewable energy and those in Penzance and Perranporth the highest levels of negativity, albeit still very small proportions.

General feelings about wind farms



And, in particular, how do you feel about wind farms specifically, as means for generating power? (1005 respondents)

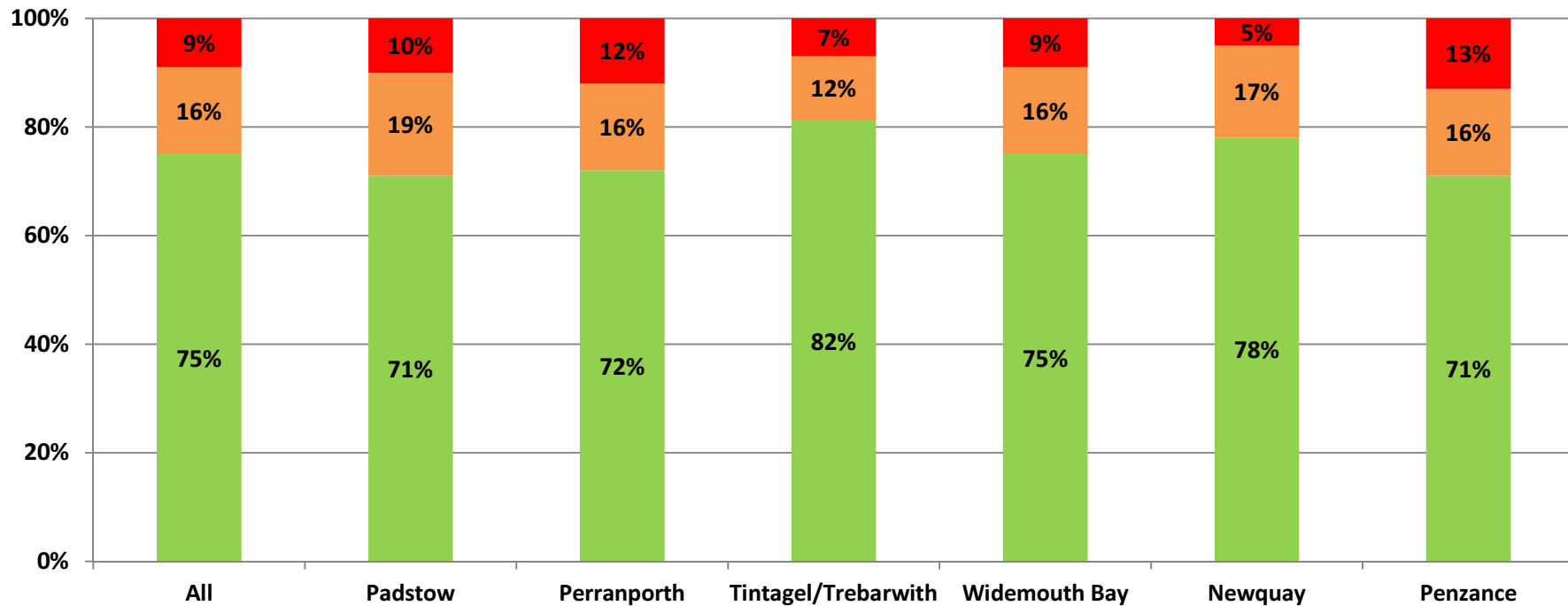
■ Generally in favour of it/on the whole a good idea
 ■ No particular opinion on it
 ■ Generally not in favour of it/on the whole a bad idea

Visitors to Cornwall also showed a high level of positivity towards wind farms, although marginally lower than their opinions when considering renewable energy generally.

Around three quarters (74%) were in favour of them and on the whole thought they were a good idea. 12% of visitors had a negative attitude towards them - double the proportion when compared with those who thought the same for renewable energy generally as a means of generating power (6%).

Again, whilst there was little notable variation in the results according to the interview location, visitors interviewed at Tintagel/Trebarwith and Newquay showed the highest levels of positivity towards wind farms.

General feelings about solar farms



And, in particular, how do you feel about solar farms specifically, as means for generating power? (977 respondents)

■ Generally in favour of it/on the whole a good idea
 ■ No particular opinion on it
 ■ Generally not in favour of it/on the whole a bad idea

In a similar pattern to wind farms, visitors to Cornwall also demonstrated a high level of positivity towards solar farms with three quarters being in favour of them and on the whole thinking they are a good idea. 9% of visitors had a negative attitude towards them - a slightly lower proportion when compared with those who thought the same for wind farms as a means of generating power (12%).

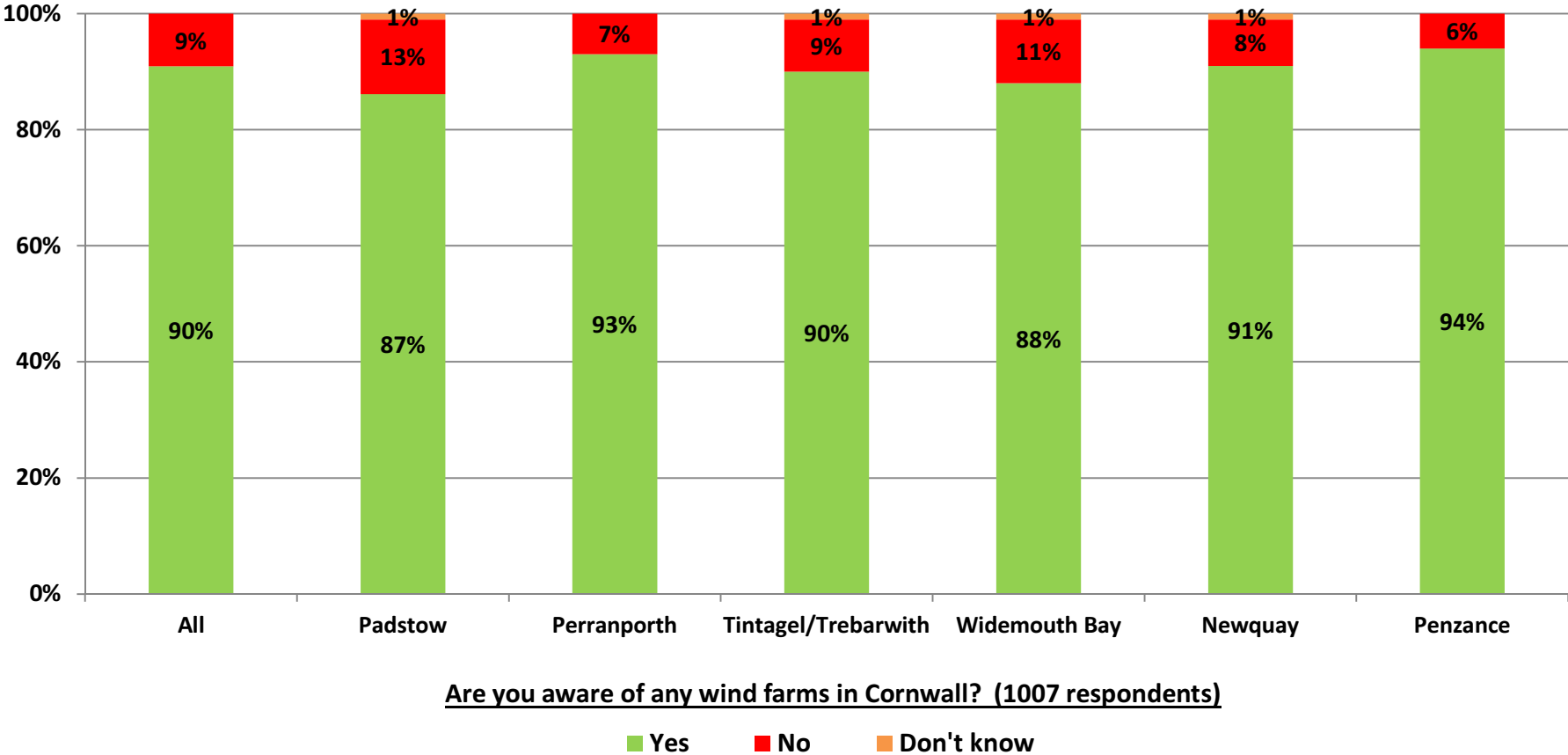
Again, whilst there was little notable variation in the results according to the interview location, visitors interviewed at Tintagel/Trebarwith and Newquay showed the highest levels of positivity towards solar farms.

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Wind and Solar Farms – Visitor Awareness and Impacts on Visits



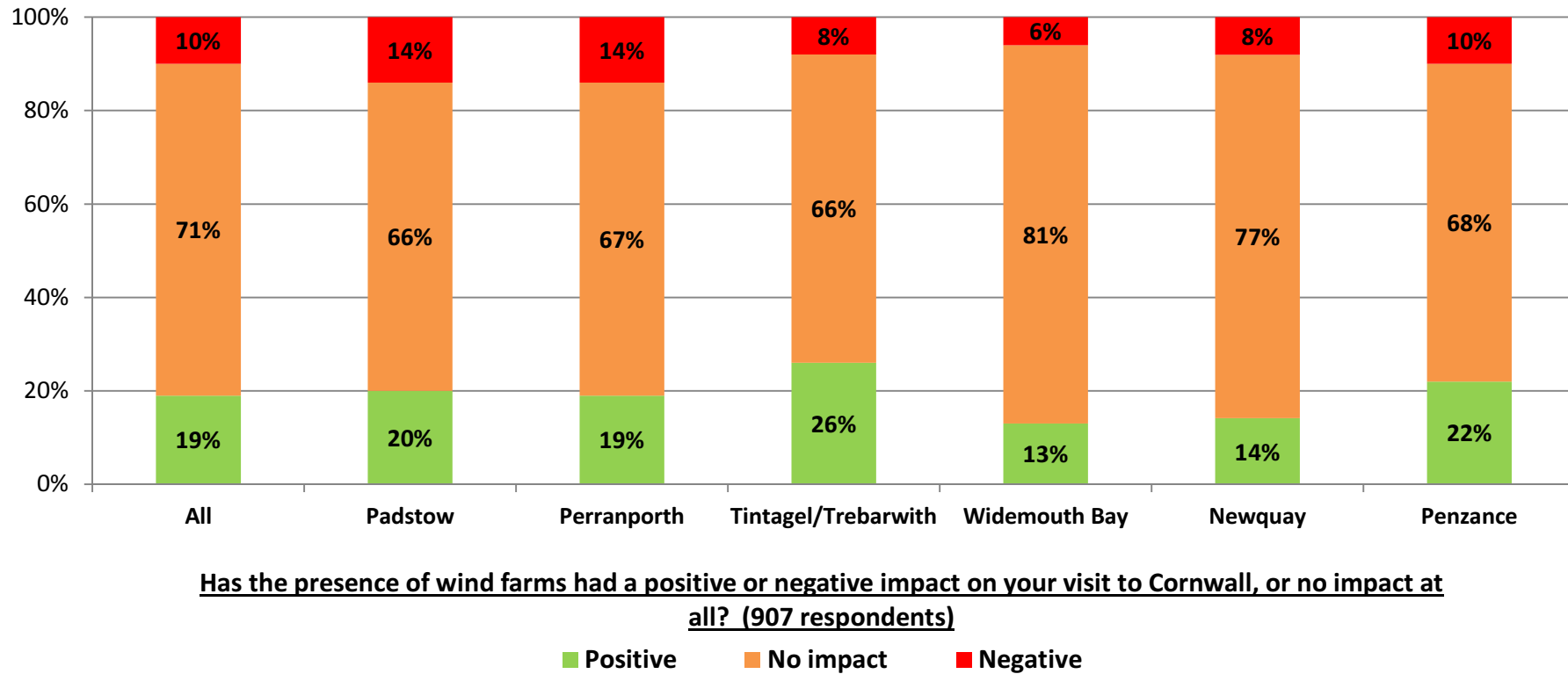
Awareness of wind farms in Cornwall



Awareness levels of wind farms in Cornwall were high amongst visitors with nine out of ten being aware of their presence in the county.

Whilst awareness levels of wind farms were high across all interview locations (87% or more) they were highest amongst visitors in Penzance and Perranporth (94% and 93% respectively) and lowest amongst those in Padstow and Widemouth Bay (87% and 88% in each case).

Impact of wind farms on visit to Cornwall



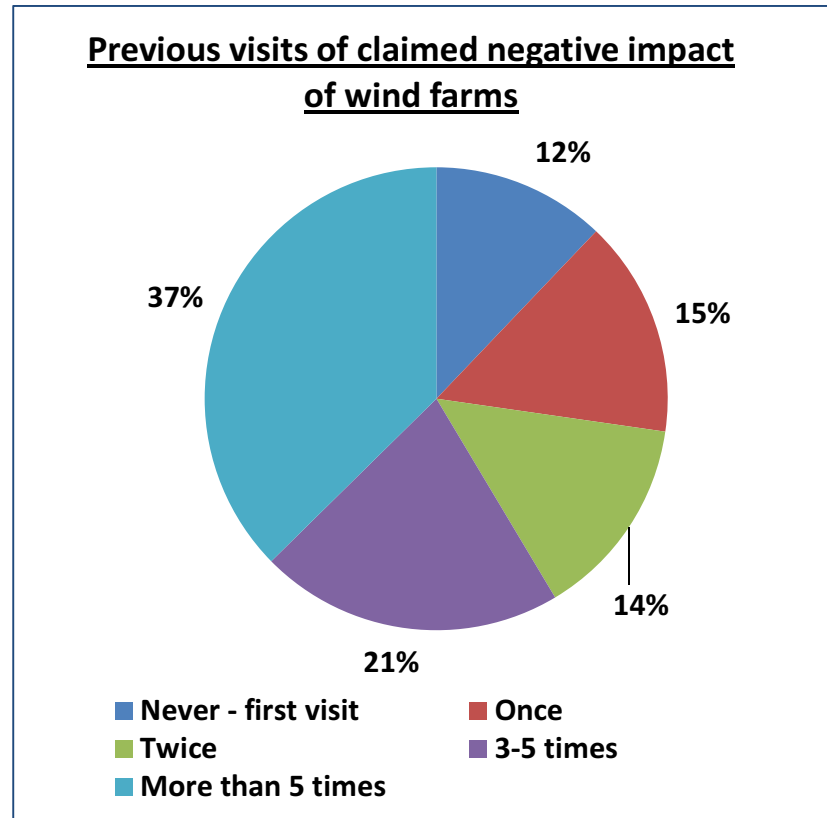
The presence of wind farms in Cornwall appears to have little negative impact on visits to the county amongst those visitors who are aware of them.

Indeed, whilst almost three quarters of visitors (71%) said their presence had no impact on their visit to Cornwall at all, 19% indicated that they actually had a positive impact on their visit to the county with this proportion highest amongst visitors in Tintagel/Trebarwith (26%) and Penzance (22%).

Just one in every ten visitors said that the presence of wind farms in the county had a negative impact on their visit including 14% of visitors in each case in Padstow and Perranporth.

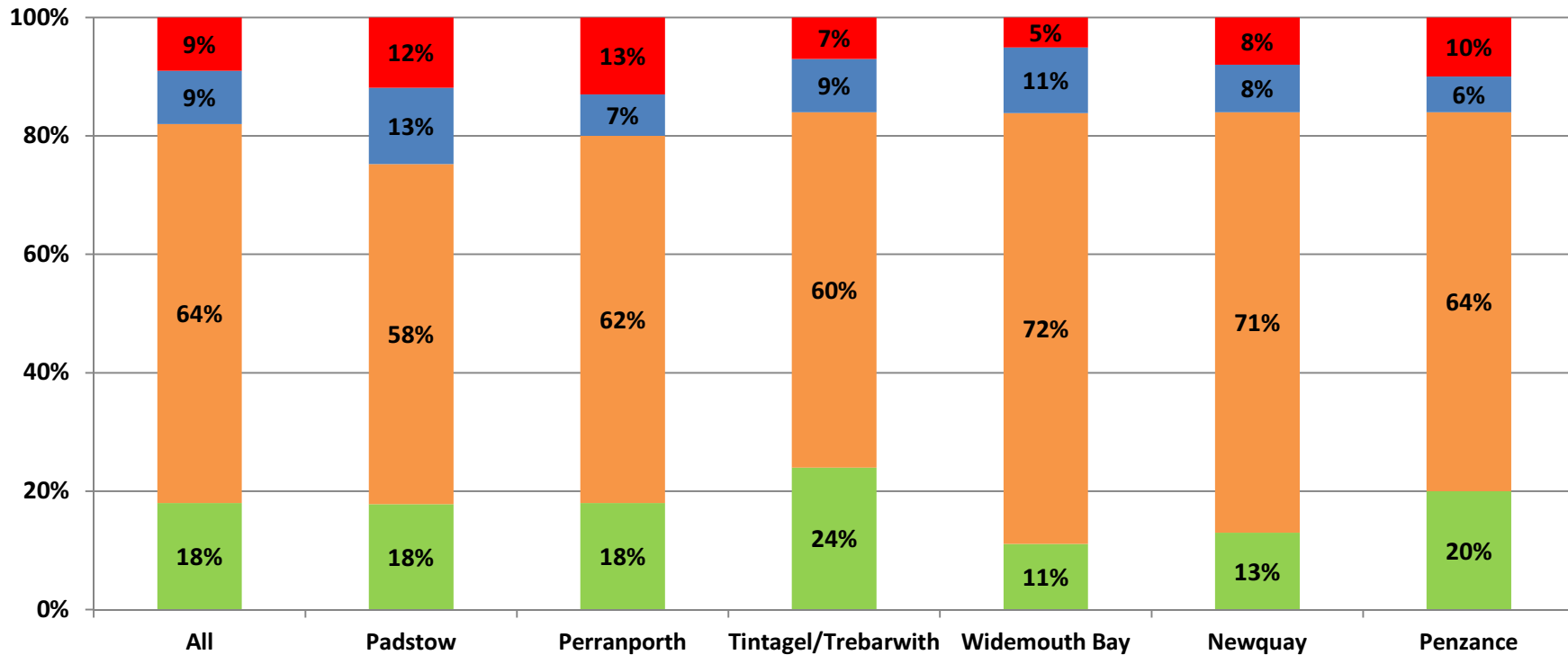
Negative impact of wind farms on visit to Cornwall

The chart below provides an additional analysis and shows the number of previous visits in the last five years of those respondents that stated that wind farms had a negative impact on their visit. It should be noted that this analysis is based upon a relatively small sample (90 respondents) due to the low number of respondents who indicated that the presence of wind farms had a negative impact on their visit to Cornwall.



58% of respondents stating a negative impact on their visit as a result of wind farms had visited Cornwall on three occasions or more in the last five years. Whilst the proportion of those stating a negative impact (10%) remains valid, the level of impact is questionable for the majority of those respondents and it would appear not large enough to consider not visiting the county.

Impact of wind farms on visit to Cornwall



Has the presence of wind farms had a positive or negative impact on your visit to Cornwall, or no impact at all? (999 respondents)

■ Positive
 ■ No impact
 ■ Unaware of Wind Farms
 ■ Negative

When those who were unaware of wind farms in the county were included in the analysis, the negative impact on visits was further reduced amongst visitors to just 9% including 13% of visitors in Perranporth and 12% in Padstow.

Their positive impact on visits outweighed any negative impact by two to one (18% of all visitors).

Wind farms – positive comments and themes

A quarter of all respondents who were aware of the presence of wind farms in Cornwall commented on their impact on their visit. 56% of these visitors (13% of all visitors) gave a positive comment about wind farms and a summary of the key phrases coming out from the findings are shown below. Recurring themes throughout the comments included them being good for the environment, green and good energy and being nice to look at.

Green energy

Look elegant/beautiful

Good energy **Eco friendly**

Good for the environment

Like the look of them

Nice to watch/see them

Good idea/renewable energy

Raise awareness

Wind farms – negative comments and themes

A third of visitors who were aware of the presence of wind farms and who commented on them (8% of all visitors) gave a negative comment and a summary of the key phrases coming out from the findings are shown below. Recurring themes throughout the comments included them being an eyesore and spoiling the environment/countryside as well as being inefficient. It is worth noting however, that a negative comment did not necessarily equate to any negative impact on visits.

Blot on the landscape

Noisy

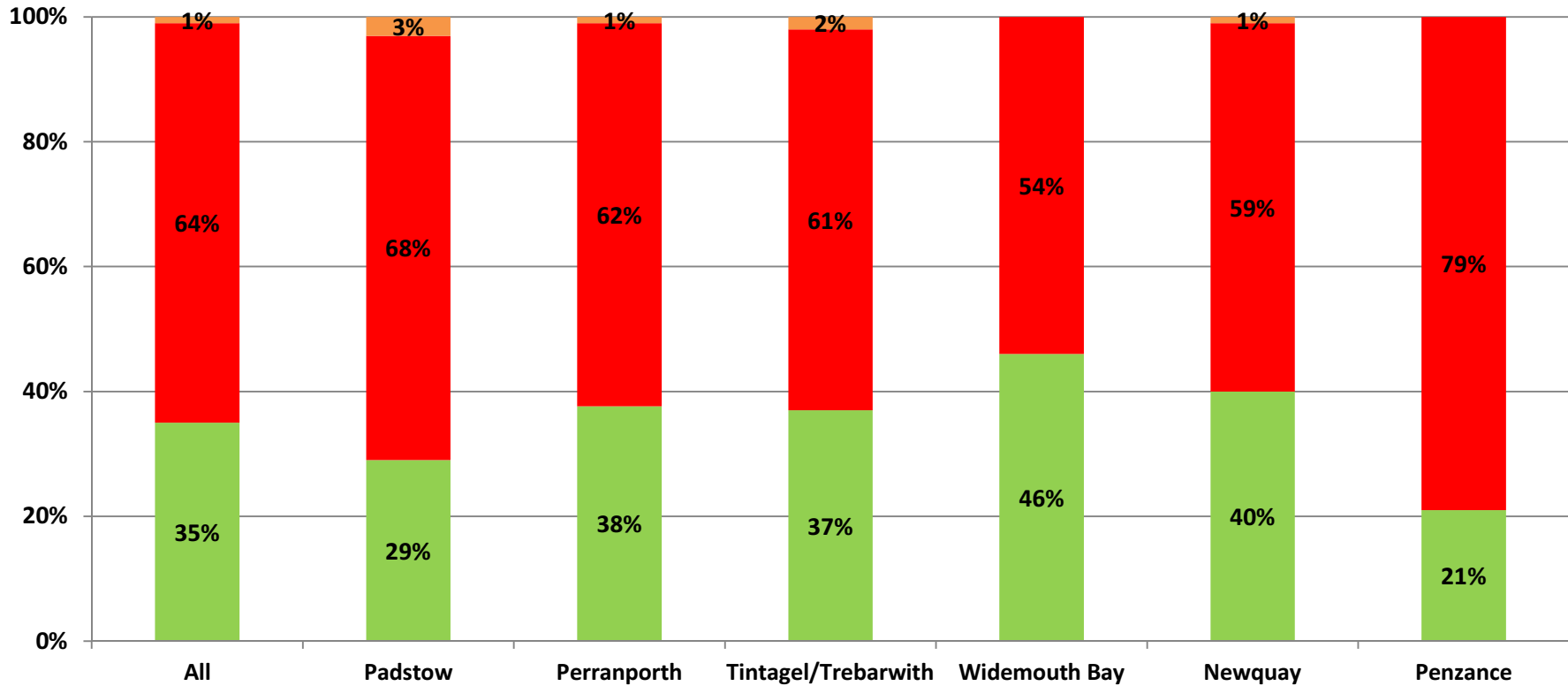
Eyesore **Inefficient**

Spoil the landscape/countryside

Too many **Ugly** **Waste of money**

Too noticeable

Awareness of solar farms in Cornwall



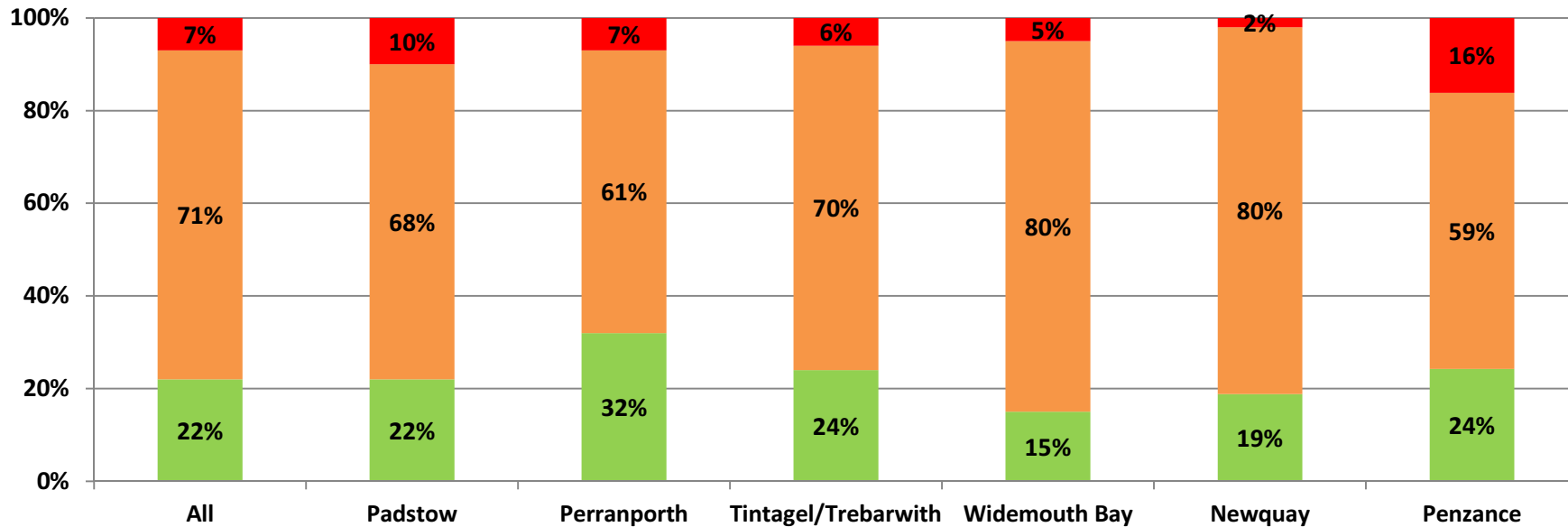
Are you aware of any solar farms in Cornwall? (1007 respondents)

■ Yes
 ■ No
 ■ Don't know

When compared with wind farms, awareness levels of solar farms in Cornwall were much lower amongst visitors with just over a third of all visitors (35%) being aware of them in the county.

Whilst awareness levels of solar farms were relatively low across all interview locations (46% or less) they were highest amongst visitors in Widemouth Bay (46%) and Newquay (40%) and lowest amongst visitors in Penzance (21%).

Impact of solar farms on visit to Cornwall



Has the presence of solar farms had a positive or negative impact on your visit to Cornwall, or no impact at all? (351 respondents)

■ Positive ■ No impact ■ Negative

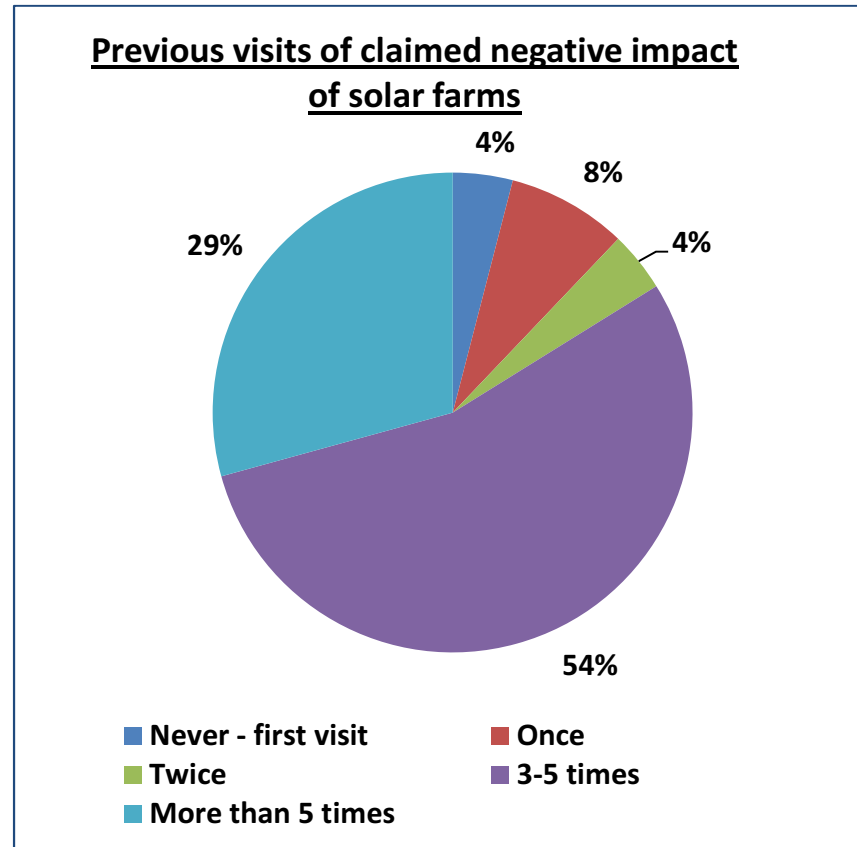
In a similar pattern to wind farms, the presence of solar farms in Cornwall also appears to have very little negative impact on visits to the county amongst those visitors who were aware of them.

Indeed, whilst almost three quarters of visitors (71%) said their presence had no impact on their visit to Cornwall at all (the same proportion as wind farms), 22% indicated that they actually had a positive impact on their visit to the county (19% wind farms) with this proportion highest amongst visitors in Perranporth (32%).

Just 7% of visitors said that the presence of solar farms in the county had a negative impact on their visit including 16% of visitors in Penzance and 10% in Padstow.

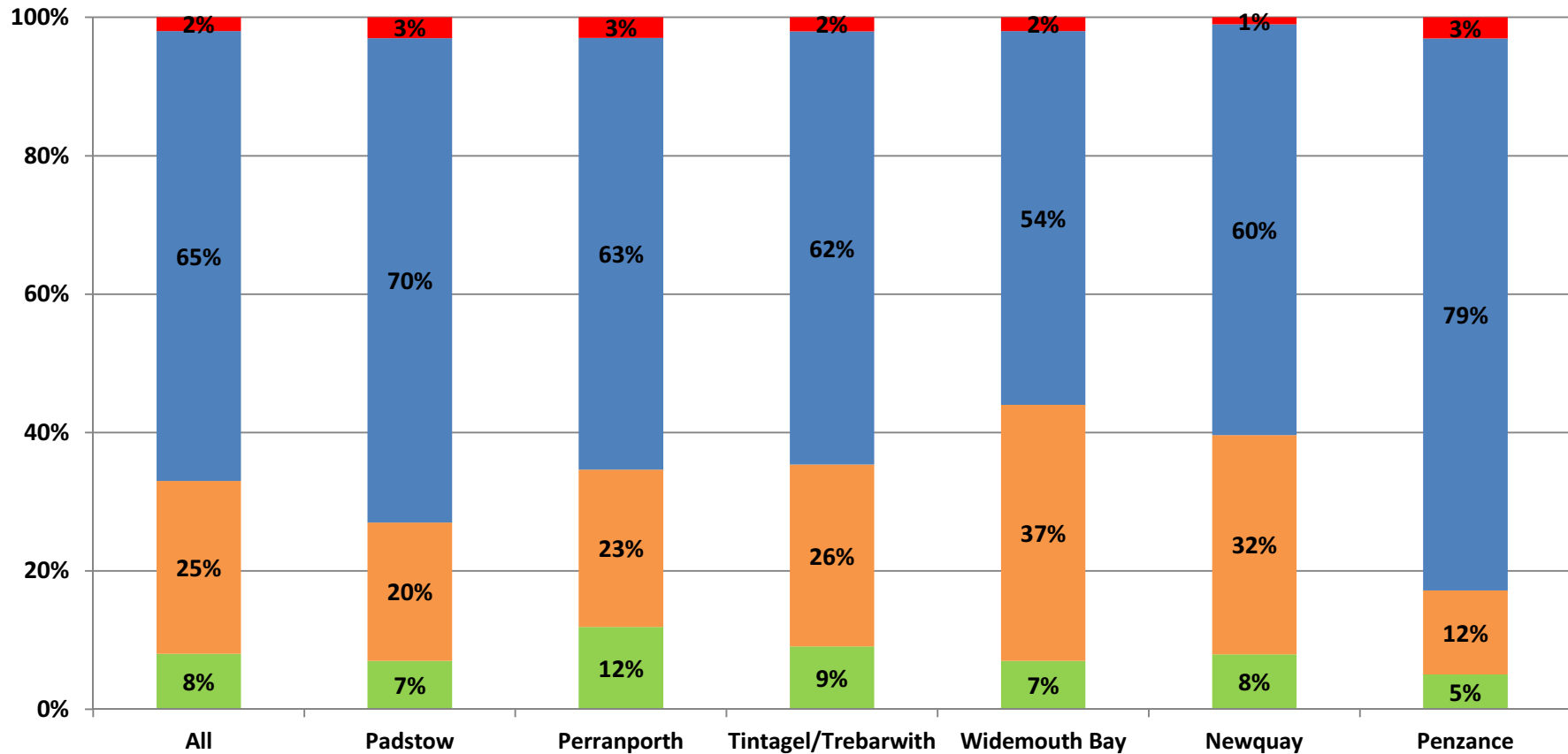
Negative impact of solar farms on visit to Cornwall

The chart below provides an additional analysis and shows the number of previous visits in the last five years of those respondents that stated that solar farms had a negative impact on their visit. It should be noted that this analysis is based upon a small sample (24 respondents) due to the relatively low awareness of solar farms in the county.



83% of respondents stating a negative impact on their visit as a result of solar farms had visited Cornwall on three occasions or more in the last five years. Whilst the proportion of those stating a negative impact (7%) remains valid, the level of impact is questionable for the majority of those respondents and it would appear not large enough to consider not visiting the county.

Impact of solar farms on visit to Cornwall



Has the presence of solar farms had a positive or negative impact on your visit to Cornwall, or no impact at all? (995 respondents)

■ Positive
 ■ No impact
 ■ Unaware of Solar Farms
 ■ Negative

When those who were unaware of solar farms in the county were also included in the analysis, the negative impact of their presence in the county was further reduced amongst visitors to just 2% and their positive impact on visits to 8%.

Solar farms – positive comments and themes

A fifth of all respondents who were aware of the presence of solar farms in Cornwall commented on their impact on their visit. 64% of these visitors (4% of all visitors) gave a positive comment about solar farms and a summary of the key phrases coming out from the findings are shown below. Recurring themes throughout the comments included them being good for the environment, green and good energy and being out of view/blending in well with the countryside.

Green energy

Low level/don't spoil the countryside

Good energy

Out of view/blend in well

Good for the environment

Better than big power stations

Good source of power/energy

Saves money

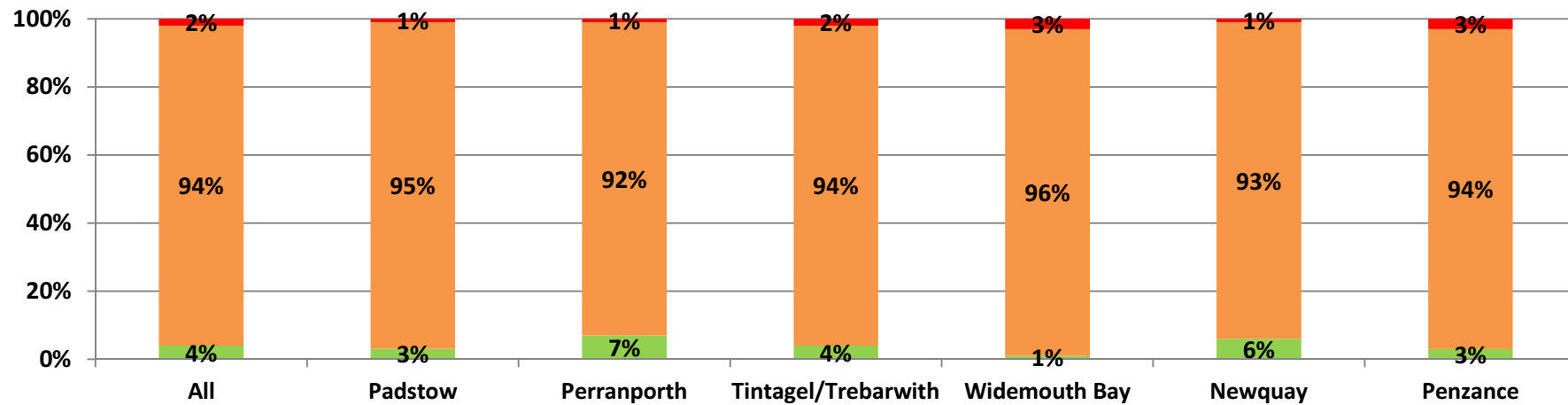
Clean energy

Solar farms – negative comments and themes

23% of visitors who were aware of the presence of solar farms and who commented on them (2% of all visitors) gave a negative comment and a summary of the key phrases coming out from the findings are shown below. Recurring themes throughout the comments included them spoiling the environment/countryside as well as being too noticeable and spoiling the land and views. As was the case with comments on wind farms, a negative comment regarding solar farms does not necessarily equate to negative impact on visits.

Too many fields taken up with them
Spoil the countryside
Look awful **Spoil the land/views**
Ruin the environment
Ugly
Visual impairment **Unsightly**
Too noticeable

Impact of wind and solar farms on future visits to Cornwall



How does the presence of wind farms and solar farms in Cornwall affect the likelihood of you visiting the county again in the future? (1003 respondents)

- They make me less likely to visit again in the future
- They make no difference in my decision to visit again in the future
- They make me more likely to visit again in the future

The presence of wind and solar farms in Cornwall appears to have very little impact on visitors decision to visit the county again in the future with just 2% of visitors saying their presence would make them less likely to visit Cornwall again.

Indeed, whilst 94% of visitors said their presence would make no difference in their decision to visit Cornwall again in the future, 4% indicated that their presence would actually make them more likely to visit again in the future with this proportion highest amongst visitors in Perranporth (7%) and Newquay (6%).

4% of all survey respondents provided a comment on how the presence of wind and solar farms in Cornwall might affect the likelihood of them visiting the county again in the future. A summary of these comments is provided on pages 36 & 37 to follow.

Wind and Solar farms – Further comments and themes - positive

26% of all visitors who provided a comment on the presence of wind and solar farms in Cornwall and their effect on the likelihood of them visiting the county again in the future gave a positive comment (1% of all respondents) and a summary of the key phrases coming out from the findings are shown below.

Recurring themes throughout the positive comments included them being good for the environment/eco-friendly and being a positive form of energy.

Forward thinking country
I like renewable energy
I am eco-friendly **Kids like them**
Good for the environment
Keeps air clean **Hopefully more in future**
Like them/not in places where spoil the countryside
Positive - cleaner energy for the environment

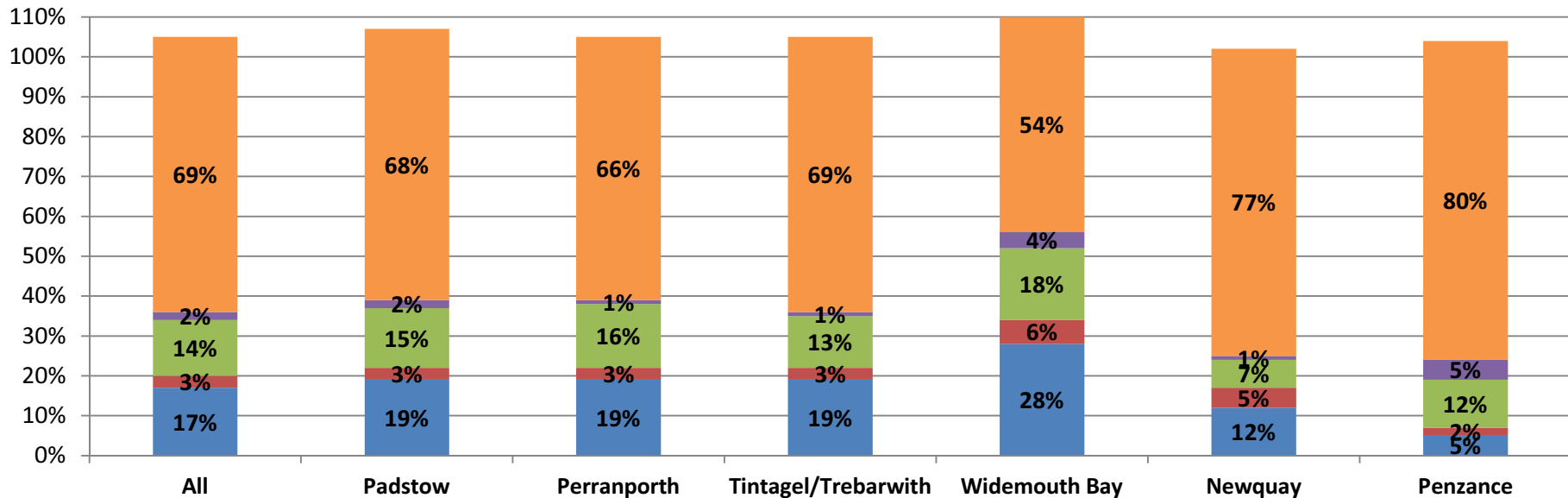
Wind and Solar farms – Further comments and themes - negative

33% of all visitors who provided a comment on the presence of wind and solar farms in Cornwall and their effect on the likelihood of them visiting the county again in the future gave a negative comment (2% of all visitors) and a summary of the key phrases coming out from the findings are shown below.

Recurring themes throughout the negative comments included them spoiling the landscape, being noisy and that if there were more, or too many, visitors may be deterred from visiting. However, it should be noted that the survey focused on visitors' attitudes in response to existing wind and solar farms in the county and it is difficult to draw conclusions on how these attitudes might change with further developments in the future. Once again, a negative comment does not necessarily equate to negative impact on visits.

Wouldn't like to stay close to them
Noisy Spoil the landscape
If more/too many I wouldn't come
Ugly
Too many

Factors which deter from visiting Cornwall in the future



Are any of the following factors likely to deter you from taking another holiday in Cornwall in the future?
(1007 respondents)

- The risk of poor weather
- Cost compared to other holiday destinations
- None of these
- The range and quality of local attractions
- The presence of wind and solar farms

When considered in the context of a number of other factors which could be likely to deter visitors from visiting Cornwall again in the future, the presence of wind and solar farms in the county appear to be the least likely to have any detrimental impact on future visits.

Whilst the majority of visitors did not indicate any factors which would deter them from visiting Cornwall again in the future (69%), the risk of poor weather (17%) and cost compared to other holiday destinations (14%) were the two factors most likely to deter them to visit the county again in the future.

Only 2% of all visitors indicated that the presence of wind and solar farms in Cornwall would deter them from visiting again in the future with this proportion highest amongst visitors in Penzance (5%) and Widemouth Bay (4%).

Factors likely to deter visits – Comments and themes

18 visitors who said that the presence of wind and solar farms in Cornwall would affect their likelihood of visiting again in the future provided a comment regarding this and these are summarised below (2% of all visitors).

Recurring themes throughout the comments included them being ugly and a waste of money and if there were to be lots more how this would affect future visits.

Would affect quality of holiday

Ugly Waste of money
If lots more/would hate it
Too many

Commercial activity will one day take over

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Good Energy Generation, Monkton Reach, Monkton Hill, Chippenham, SN15 1EE
Registered Office: Good Energy Generation Limited, Monkton Reach, Monkton Hill, Chippenham, SN15 1EE
Company Registration No. 2549857, Place of Registration: England and Wales. VAT No. 811 3295 57
Contact us: www.goodenergy.co.uk