

Public perceptions of onshore wind farm development in the UK





ONSHORE WIND IN THE UK

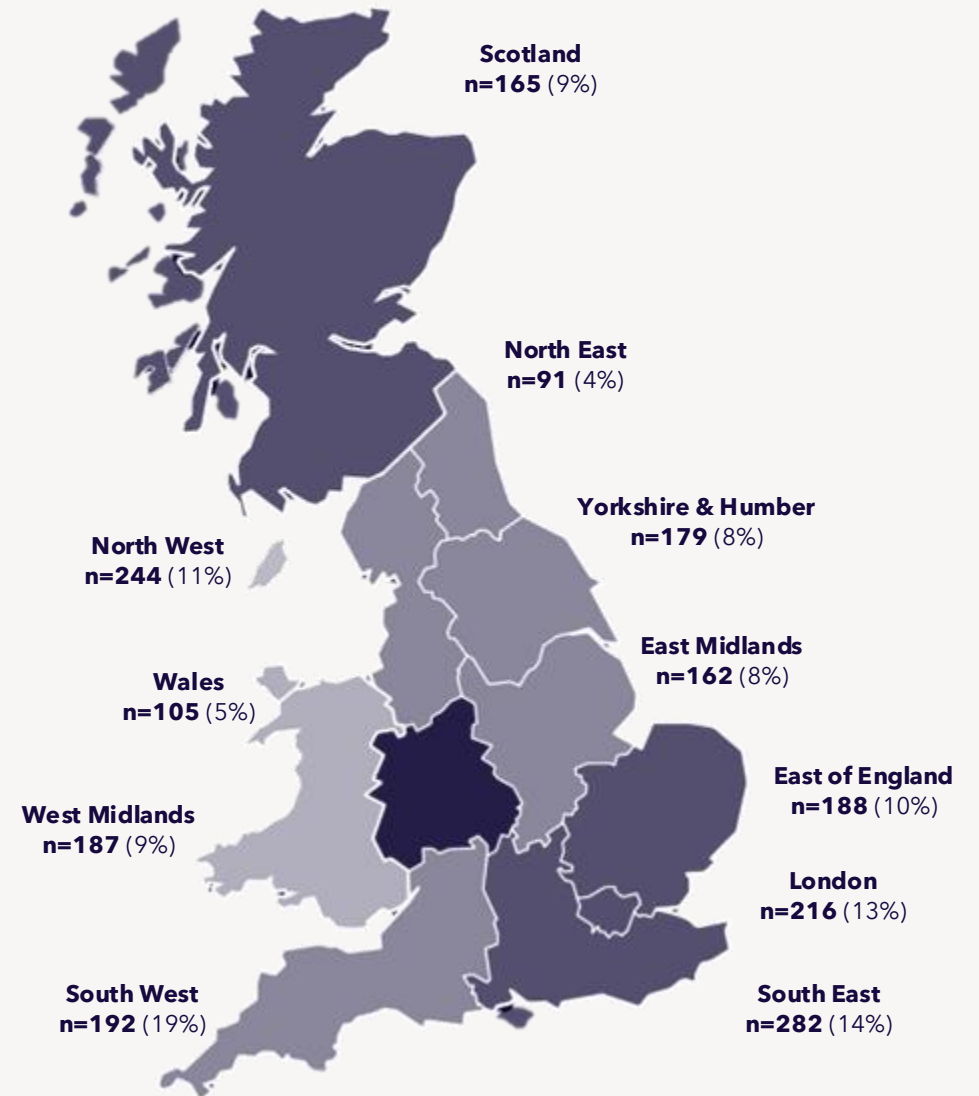
- The UK has developed a series of policies and strategies in its commitment to achieve Net Zero by 2050.
- In July 2024, the Labour Government announced its 'Policy statement on onshore wind', including the following changes:
 - removal of the ban on onshore wind farm development; and
 - the goal to double onshore wind energy generation by 2030.
- The Government has also announced a budget of over £1.5 billion to deliver UK based clean energy projects.

Consequently, SEC Newgate identified the need to understand community perceptions towards onshore wind farm development as the UK strives towards the transition to renewable energy and Net Zero by 2050.



COMMUNITY RESEARCH

- **Omnibus survey of n=2,011** residents aged 18+ years across the UK (excluding Northern Ireland)
- Fieldwork: August 2024
- Data weighted by representative age, gender, and regional factors



Key insights.

42%

of UK residents **have experience with the planning or building of an energy project** in their local area

53%

of UK **residents feel positive** about lifting the ban on the development of onshore wind farms

55%

of UK residents **ranked onshore wind as the most important energy source** (ranked 1st, 2nd or 3rd)

59%

of UK residents say it would be **acceptable to develop an onshore wind farm** in their local area. This increases to **68%** if residents have prior experience of an energy project

Top perceived benefits of onshore wind

51%



Wind is a natural energy source

42%



Low emissions, cleaner way of generating energy than fossil fuels

39%



Helps to combat pollution and climate change

Insights from the national research

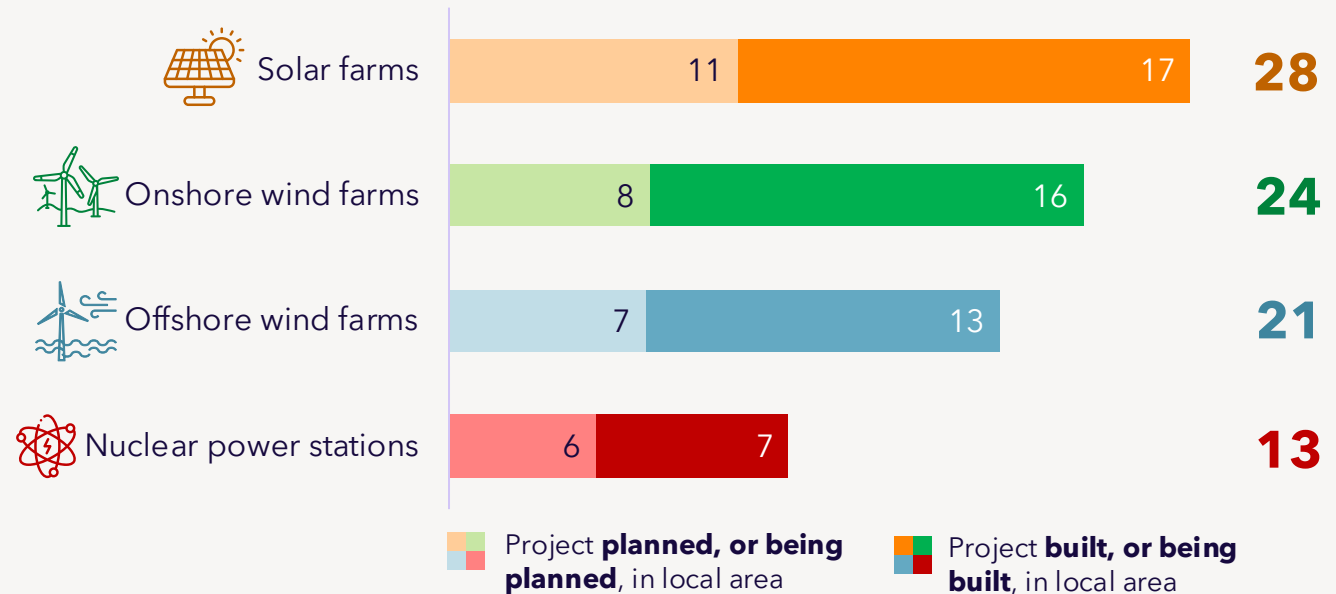
UK residents are most likely to have experienced solar farms and onshore wind farms being planned or built in their local area.

In general, **men and younger cohorts aged 18-34 years tend to recall projects**, compared to women and older cohorts (35+ years), across all energy project types.

Experience of energy infrastructure projects

Experience of energy projects being planned or built in a local area (%)

NET Any experience of an energy project in local area (planned or built) (%)



42% of UK residents have experience with the planning or building of an energy project in their local area

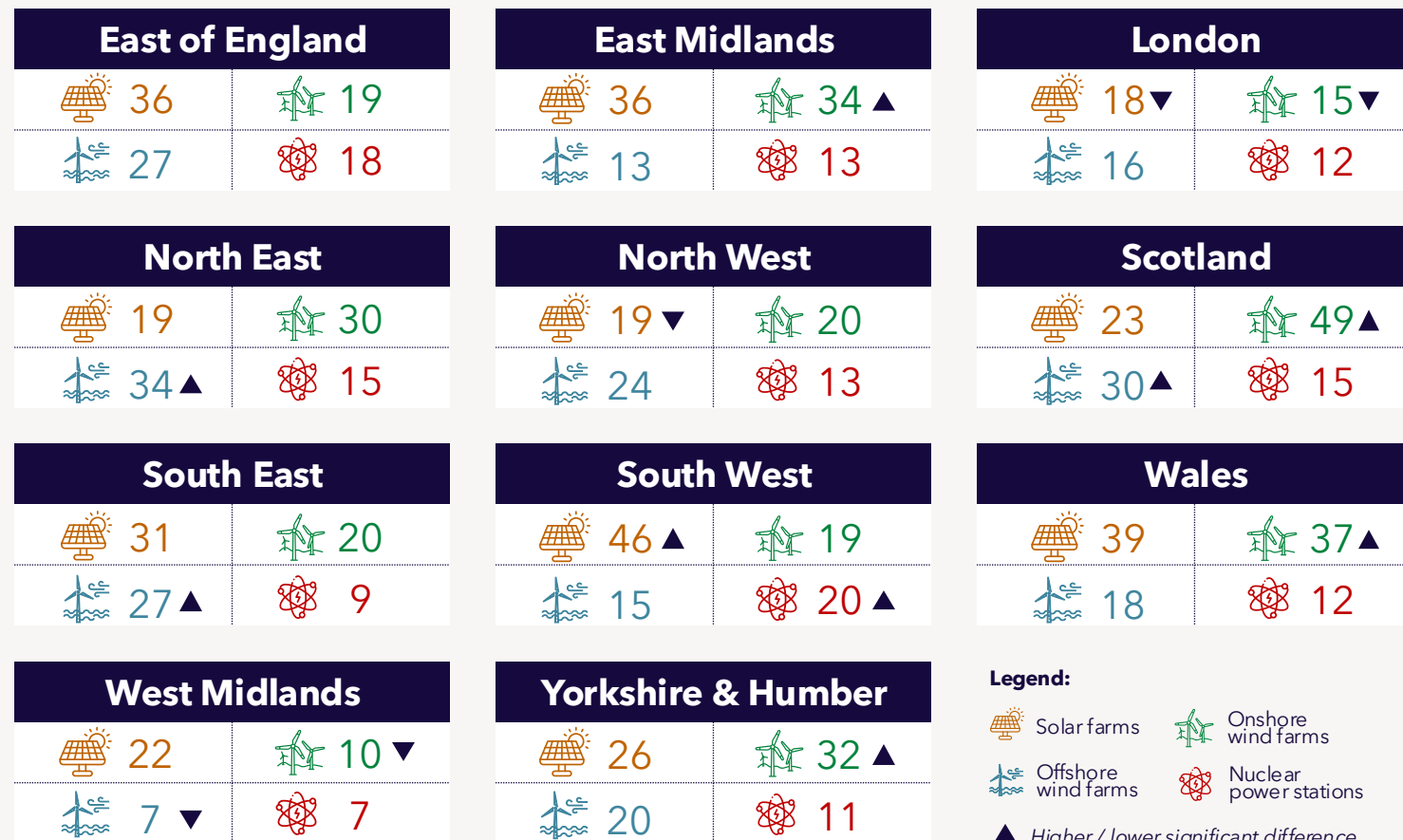
Q2. Have you experienced any of these types of energy projects being planned or built in your local area?
/ Base: All participants (n=2,011)

Residents in East Midlands, Scotland, Wales, and Yorkshire & Humber are more likely to say they've experienced an onshore wind farm.




Experience of energy infrastructure projects

Regional lens

NET Experience of energy projects being planned or built in a local area: By region (%)



Legend:

-  Solar farms
-  Onshore wind farms
-  Offshore wind farms
-  Nuclear power stations

▲ Higher / lower significant difference compared to other cohorts within subgroup
▼

Q2. Have you experienced any of these types of energy projects being planned or built in your local area? / Base: Regional subgroups - see map

Over half of the British public consider offshore and onshore wind farms, and solar farms, to be the top three most important energy sources for the UK.

Men (51%) ranked nuclear power stations as more important than women (31%), whilst those aged 45+ year's old (78%) ranked offshore wind as significantly more important than younger cohorts did, surpassing their importance ranking for onshore wind (56%)

How important are different energy sources for to achieve Net Zero by 2050?

Proportion who ranked the following energy sources in their Top 3 most important for the UK to develop to achieve Net Zero by 2050 (%)

Most important energy sources



Less important energy sources



Q1. For the following sources of energy, please rank what you think are the most to least important (1 = most important to 6 = least important) for the UK to develop in order to deliver on this legal commitment. / Base: All participants (n=2,011)

Survey participants were shown the following information about the development of onshore wind in the UK.

Information provided: **Lifting the onshore wind ban**

In 2015, the UK Government placed an effective ban on the development of onshore wind farms, by limiting onshore wind farm developments to areas that had only been allocated as suitable by Local Planning Authorities.

On 8 July 2024, the newly elected government announced the lifting of this ban on onshore wind farms. This means that local councils will be able to decide on each planning application for a new onshore wind farm on its own merits. The government also announced a goal to double the amount of onshore wind energy by 2030.

Just over half of the British public are positive about lifting the ban on onshore wind development.

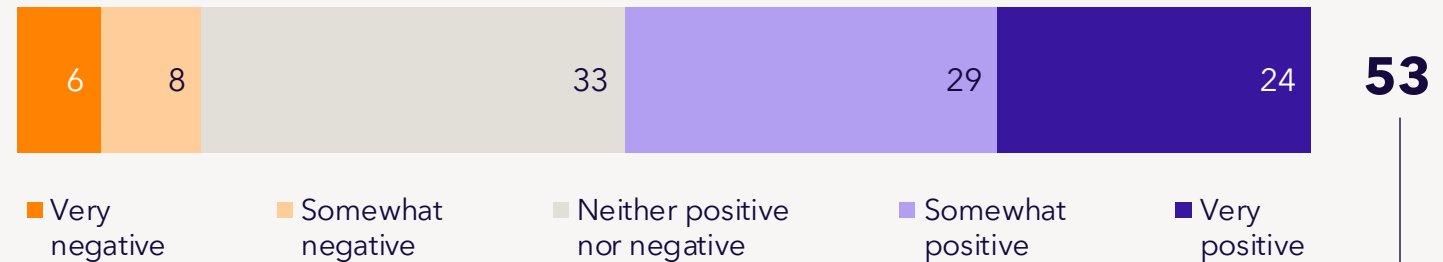
Notably, 24% feel very positive about lifting the ban compared to 6% who feel very negative.

Demographic skews highlight an interesting theme of positivity amongst men, higher income households and younger cohorts, whilst negativity is more prominent amongst older groups and homeowners.

Sentiment towards lifting the onshore wind ban

Rating of sentiment towards lifting the ban on the development of onshore wind (%)

NET Positive (%)



Those who are **significantly more likely to feel negative** about lifting the ban towards onshore wind development include:

- **55+ year old's** (24%)
- **Homeowners** (18%)

Those who are **significantly more likely to feel positive** about lifting the ban towards onshore wind development include:

- **Men** (62%)
- **Higher income households** (earning £41,000+) (64%)
- **Tertiary level educated** (61%)
- **Younger cohorts** (aged 18-34 years) (59%)

Seven in ten believe that there are benefits to the UK lifting the ban on onshore wind development.

However, there is a notable 18% of the public who are uncertain about what the benefits of onshore wind developments would be for the country and a further 10% who don't believe there are any benefits.

Perceived **benefits** of lifting the onshore wind ban

Position on the benefits for the UK in lifting the ban on the development of onshore wind farms

72% picked at least one benefit to the UK lifting the onshore wind development ban

Those who perceive a benefit are significantly more likely to be:

- **Higher income households** (earning £41,000+) (80%)
- **Tertiary level educated** (78%)
- **Men** (77%)

18% are unsure what the **benefits** of lifting the onshore wind development ban would be

10% don't believe there are any **benefits for the UK** in lifting the onshore wind development ban

Q4. In your view, what are the benefits for the UK in lifting the ban on the development of onshore wind farms?
/ Base: All participants (n=2,011)

Efficacy and positive environmental impact are seen as the top benefits of onshore wind.

A third of residents also note the efficacy of onshore wind in the UK specifically, citing the advantages of the UK's climate.

Perceived benefits of lifting onshore wind development ban

The benefits for the UK in lifting the ban on the development of onshore wind farms

Multiple selection of **those who selected a benefit**, shown in descending order (%)

Benefit	% Selected
Wind is a natural energy source that is always there	51
Onshore wind farms are a low emissions, cleaner way of generating energy than fossil fuels	42
Onshore wind helps to combat pollution and climate change	39
Onshore wind is an environmentally friendly source of energy that helps protect nature	37
The UK's climate makes it one of the best countries to build onshore wind farms	34
Onshore wind farms can be delivered much quicker than other sources of low emissions energy such as nuclear power stations	31
Onshore wind farms can support the supply chain and manufacturing in the UK	28
Wind energy is the best way to keep the lights on in the future	27
Developing new onshore wind farms will help offer discounts on consumer energy bills	26
The creation of the publicly-owned clean energy investment fund, Great British Energy, means profits from new onshore wind farms will go back	25
Onshore wind farms are needed to decarbonise polluting sectors like transport and heavy industry	24
Onshore wind farms have been proven to create jobs, skills, and investment in local areas	24
Onshore wind farms often make a direct financial contribution to the communities that host them - such as via a community fund	19
Onshore wind farms are more visually appealing than other sources of low emission energy	14

Q4. In your view, what are the benefits for the UK in lifting the ban on the development of onshore wind farms? / Base: Those who selected a benefit (n=1,813) Those who did not select a benefit have been removed from this chart

Three in five consider it acceptable to develop an onshore wind farm in their local area.

Looking at **experience of energy projects (planned or built) by region** identifies skews of acceptability:

- 46% of residents in the North East with experience found a potential development in their local area 'very acceptable' (vs 24% total)
- 42% of residents in the East Midlands with experience found a potential development in their local area 'very acceptable' (vs 24% total)
- 73% of residents in Yorkshire & Humberside with experience found a potential development in their local area 'very / somewhat acceptable' (vs 59% total)

How **acceptable** would it be to develop a local onshore wind farm?

Rating of acceptability of an onshore wind farm development in a local area near you (%) **NET Positive (%)**



Those who are **significantly more likely to say it's unacceptable to develop an onshore wind farm in a local area** include:

- **55+ year old's** (24%)

Those who are **significantly more neutral** towards the development of an onshore wind farm in their local area include:

- **West Midlands** (38%)

Those who are **significantly more likely to say it's acceptable to develop an onshore wind farm in a local area** include:

- **Higher income households** (earning £41,000+) (70%)
- **Tertiary level educated** (65%)
- **Men** (64%)

Q5. How acceptable do you think it would be to develop an onshore wind farm in a local area near you? / Base: All participants (n=2,011)

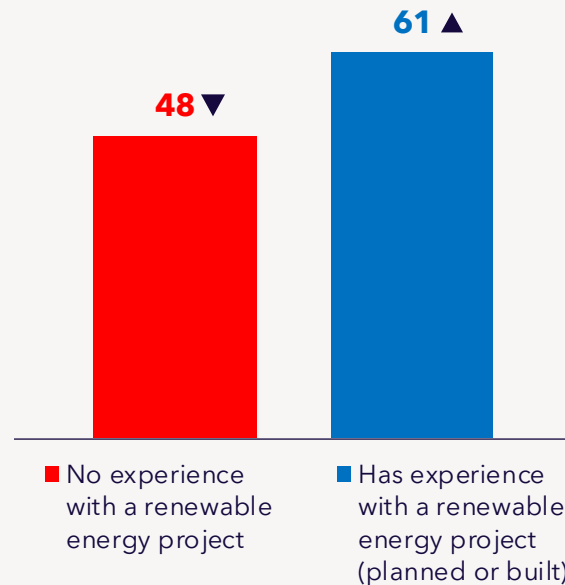
Having previous experience with any renewable energy project promotes greater positivity and acceptance towards onshore wind farm development.

This is likely driven by the fact that those with experience are more likely to perceive the benefits of onshore wind farms for the UK.

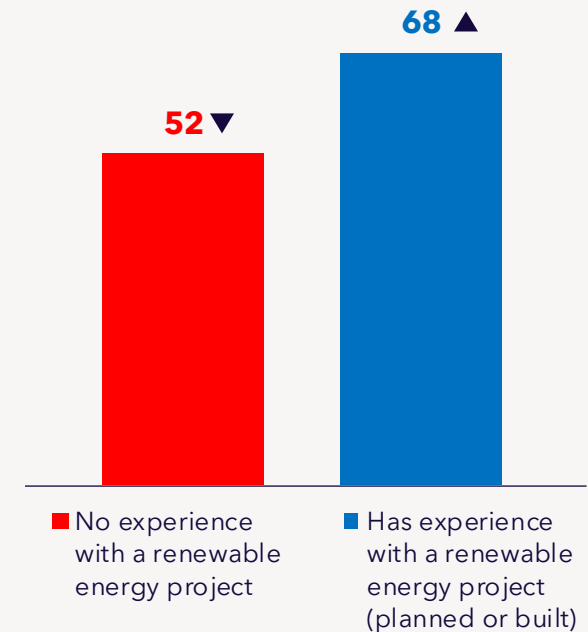
Driving acceptability of an onshore wind development: Impact of **experience** with a renewable energy project

Comparison of sentiment and acceptability towards onshore wind farm development: Those with experience of a renewable project vs. Those without experience of a renewable energy project

NET Feel **positive** towards lifting the ban on the development of onshore wind (%)



NET Consider it **acceptable** to develop an onshore wind farm in a local area (%)



Q3. How positive or negative do you feel about lifting the ban on the development of onshore wind farms? / Q5. How acceptable do you think it would be to develop an onshore wind farm in a local area near you? / Base: All participants (n=2,011)

▲ Higher / lower significant difference compared to other cohorts within subgroup
▼

Key take-outs

Engaging with communities about **onshore wind farm** developments.

The public recognise the importance of wind and solar energy in achieving the UK's commitment to reaching Net Zero by 2050.

Emphasising the environmental positives of renewable energy will have the greatest impact in promoting support, but there is a need to make the local and economic benefits more tangible for communities.

As familiarity and experience with renewable energy projects grow, the research indicates that this will drive positive sentiment and levels of public acceptance.



Thank you.

research@secnewgate.co.uk

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