Appendix 15.B
Public Attitudes to Renewable Energy and Wind Farm Development
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Introduction

1.1.1 This appendix supports Chapter 15 of the ES by providing an overview of surveys, polls and research regarding public and tourist attitudes towards the deployment of renewable energy technologies including wind farms.

1.1.2 A number of studies have been consulted to gather information on public attitudes towards wind farm development and in particular the potential effects of wind farm development on tourism. The following surveys and research studies have been reviewed as part of this assessment:

- MORI. (September 2002) Tourist Attitudes towards Wind Farms. British Wind Energy Association and Scottish Renewable Forum;

1.1.3 This appendix is structured as follows:

- Section 2 summarises recent polling and survey data regarding general public attitudes towards the deployment of renewable energy technologies, with a specific focus on attitudes towards onshore wind farm development.
Section 3 outlines recent surveys, polls and research regarding potential impacts from the construction and operation of onshore wind farms on tourism interests.

Section 2: Public Attitudes Towards Renewable Energy & Onshore Wind Farms

1.1.4 In early 2012 DECC set up a rolling tracking survey to monitor changes in public attitudes regarding key departmental issues, including support for the deployment of renewable energy technologies. The latest rounds of surveys were conducted between 18th – 29th March and 24th – 28th June 2015 using face-to-face in-home interviews with representative samples of 1,981 and 2,118 UK households respectively. As reported in the Summary of Key Findings publications for Waves 13 and 14, these survey results indicate that:

- 75% of people support the use of renewable energy sources to generate the UK’s electricity, fuel and heat. This includes 24% of people who strongly support the deployment of renewable energy technologies. Just 4% of people oppose the deployment of renewables, including 1% of people who strongly oppose this. It is noted in Wave 14 publication that “support for renewable energy has been consistently high during the tracker, fluctuating around 75-82%”.

- 71% of people agree that renewable energy industries and developments provide economic benefits to the UK, with 6% disagreeing. The level of general public support for renewable energy industries has remained broadly constant since the inception of DECC’s public attitudes tracker surveys in 2012.

- 55% of people would be happy to have a large scale renewable energy development in their area.

- 78% of people think that renewable energy developments should provide direct benefit to the communities in which they are located.

- 65% of people support the deployment of onshore wind farms whilst 12% of people oppose this. 22% of people strongly support the deployment of onshore wind farms whilst 4% of people strongly oppose this. Since the inception of DECC’s public attitudes tracker surveys in 2012 public support for the deployment of onshore wind farms has fluctuated between 64-70%.

Polling Evidence

1.1.5 Relevant polling evidence is summarised chronologically below:

- A poll (1567 people) conducted by YouGov for the Sunday Times on 14th-15th May 2015 found that 61% of respondents were in favour of the deployment of more onshore wind farms, whilst 14% of respondents said there should be a ban on further deployments.

- A poll published on 18th August 2014 of 4051 people (conducted in July 2014) by ComRes found that 62% of all Britons and 55% of those living in rural areas would be happy to have an onshore wind development in their local area. 32% of rural dwelling Britons said they would oppose local onshore wind developments.

- Another poll (2065 people) conducted by ComRes in June 2014 on behalf of Renewable UK found that 48% of people consider the deployment of renewable energy as the number one priority to ensure the UK’s future energy supply.

- In February 2013 YouGov conducted a survey for Scottish Renewables which revealed that 64% of the 1,003 people questioned across Scotland support the continued development of wind power as part of a mix of renewable and conventional forms of electricity generation. 62% of respondents stated that they would be “generally for” the development of large-scale wind farm projects being built in their local authority area, with 20% of people “generally against” such development. Furthermore, 69% of respondents stated that generally speaking their decision to visit an area would not be affected by the presence of a wind farm, while 26% of respondents thought that this decision would be affected by the presence of a wind farm.
The results of the 2013 YouGov poll accord with the findings from a UK-wide MORI poll of 1,009 adults published in April 2012. This survey indicated that 66% of respondents were in favour of the use of wind power, with 28% "strongly in favour". One in twelve (8%) of those surveyed were opposed, with 3% indicating that they are "strongly opposed" to the use of wind power.

When asked to judge the general acceptability of the landscape impacts of wind farms on a 1-10 scale (with 1 being completely unacceptable and 10 being completely acceptable) the most common response (20% of respondents) was 10. Only 6% of respondents stated that the landscape impacts of wind farms are completely unacceptable.

As part of the Transforming the UK Energy System: Public Values, Attitudes and Acceptability study funded by the UK Energy Research Centre, Demski et al (2013) report the results from a survey of 2,441 people across the UK conducted in August 2012. Generally speaking, renewable energy technologies were highly favoured by a majority of the respondents, and 75% of respondents were “very/mainly favourable” towards the use of wind energy in the UK.

Overall these survey results indicate a consistently high level of general public support for the deployment of renewable energy technologies, including specifically onshore wind farms, across Scotland and the wider UK. It must however be noted that this supportive baseline position relates to the social acceptability of wind farms in general rather than specifically in relation to the Proposed Development.

Section 3: Research regarding the Impact of Onshore Wind Farms on Tourism

A number of studies have specifically considered the impact of wind farms on tourism and tourists’ attitudes towards wind farm developments. Within the aforementioned 2013 YouGov poll for Scottish Renewables, 69% of respondents stated that generally speaking their decision to visit an area would not be affected by the presence of a wind farm, while 26% of respondents thought that this decision would be affected by the presence of a wind farm. These results accord with the findings of previous studies including Visit Scotland’s Wind Farm Consumer Research (2012), which found that 80% of UK residents and 83% of Scottish residents surveyed stated that the presence of a wind farm would not affect their decision about where to visit or stay on a UK holiday or short break.

The Moffat Report

In 2007 the Scottish Government commissioned Caledonian University to undertake a study to assess whether the Scottish Government’s support for wind farms under its renewable energy targets would be likely to have an economic impact, positive or negative, on the Scottish tourism industry. The study conducted an intercept survey with 380 tourists, asking their opinion of eleven different types of structures in the landscape, in order to determine the associated effect on tourism. The research also involved a literature review of over 40 other studies considering the impact on tourism from wind farms in the UK, Ireland, and other countries with similar landscape characteristics to Scotland. In addition an internet survey of 700 people from both the UK and USA who had been, or were likely to go, to Scotland in the near future was carried out. The results from these research methods are detailed in ‘the Moffat Report’, which was published by the Moffat Centre for Travel and Tourism Business Development at Caledonian University in 2008.

The Moffat Report indicates that 39% of survey respondents felt that wind farms had a positive impact on the landscape, 36% had no opinion and 25% thought that wind farms had a negative impact on the landscape. The findings also show that tourist’s attitudes were more negative towards pylons (49% of those surveyed), mobile telephone masts (36% of those surveyed) and power stations (26% of those surveyed) than wind turbines (25% of those surveyed). It should also be noted that overseas visitors showed a more positive attitude towards wind farms. In terms of the online survey, the results from this indicate that the youngest respondents (ages 16-25) in general thought that wind farms have less of an impact than potential visitors in other age ranges.

The Moffat Report further confirms that over 90% of those surveyed who have seen a wind farm stated that the experience would have no effect on their likelihood of returning to the location/Scotland, and for some it would increase the likelihood of return (Moffat Centre -
Caledonian University, 2008). This confirms results of previous attitude surveys including MORI’s Tourist Attitudes Towards Wind Farms (2002), where the results showed that 91% would visit the area again regardless of wind farms being located there (MORI, 2002).

Overall the findings of the Moffat Report demonstrate that the negative impact of wind farms on tourism at the national level is relatively minor and that the associated negative impact on employment numbers is less than the employment directly generated by the wind power industry. The study recommends that planning authorities seek the advice of local tourist agencies and consider the potential impacts on tourism “where tourism is an important part of the local economy”. Consideration of the following topics is suggested: tourist numbers and routes; scale of tourism within the area; views from accommodation; positives associated with the development; and views of local tourist boards. The socio-economic, tourism and recreation assessment detailed in Chapter 15 of the ES responds to the recommendations within the Moffat Report by considering potential effects on tourism accommodation and assessing in detail the predicted effects of the Proposed Development on tourism and recreational receptors during the construction, operational and decommissioning phases.

Other Studies

Previous studies confirm that the Scottish tourism industry relies heavily on the countryside and landscape and the attraction this holds to tourists, with over 80% of those surveyed stating it as their ‘main’ reason for visiting (MORI, 2002). However, the results from a relatively recent Visit Scotland survey suggest that British tourists do not feel that wind farms spoil the look of the countryside, and the majority felt that wind farms do not currently ruin the tourism experience (Visit Scotland, 2012).

The 2002 MORI study also showed that 80% indicated they would be interested in visiting a wind farm if open to the public and with a visitor centre, with 54% ‘very interested’ in doing this. It should be noted that the visitor centre at Whitelee Wind Farm near Glasgow, which is managed by the Glasgow Science Centre, attracted over 120,000 visitors in its first 12 months after opening in September 2009 and by the summer of 2012 the visitors centre had attracted over 250,000 visitors. In addition it is estimated that to date at least a further 100,000 people have directly accessed the wind farm’s 90km of trails for recreational purposes such as jogging and cycling. In recognition of the fact that Whitelee Wind Farm has become an important tourist destination ScottishPower Renewables announced on 20th June 2012 that the wind farm would become the first wind energy project in Scotland to join the Association of Scottish Visitor Attractions (ScottishPower Renewables, 2013).

Conclusion

Overall, a review of studies and surveys suggests that whilst there are clearly different views on wind farms, there is no conclusive data that demonstrates tourism is generally adversely affected by wind farm developments. Indeed, in the final report of its inquiry into the achievability of the Scottish Government’s 2020 renewable energy targets the Scottish Parliament’s Economy, Energy and Tourism Committee concluded that “no witness has provided the Committee with robust, empirical evidence, as opposed to anecdotal comment and opinion, that tourism is being negatively affected by the development of renewable projects” (Scottish Parliament, 2012: 8). Nevertheless, it is necessary to consider the associated impacts of wind energy development on tourism and wider recreational activities as a result of impacts upon landscape and visual amenity. Potential effects on tourism and recreational activities and receptors are therefore considered in Sections 15.7-15.10 within Chapter 15 of the ES.