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Solar Energy UK

2023 – a transformative year for Solar

A study of public attitudes to solar development

Foreword

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Since the publication of our report, '2022: A New Dawn for Solar', we have seen the potential of the UK's large-scale ground-mount solar industry was ramping up. During that time, we've also seen three prime ministers, two monarchs, and numerous solar schemes enter the national, devolved and local planning systems.

As more projects come forward and the energy transition accelerates, we can expect public attitudes to shift. A higher quantity of larger-scale projects comes with many opportunities for greening the UK economy and electricity network. However, this is also coupled with concern amongst communities about their local landscapes changing.

For solar to play the role it must in achieving net zero by 2050, it's key we understand public perceptions.

This report refreshes many of the questions we asked in 2022, finding continuity in public support for solar development, alongside tracking trends in what matters most to people in development, and where knowledge gaps can be bridged.

We have also sought to shine a light on how these attitudes shift throughout the development cycle, and how the increasing cases of cumulative impact on communities have been responded to.

With a general election due no later than the end of 2024, and the cost of living remaining a top headline, it's becoming increasingly clear that energy policy will play an important role in the debating arena.

In the net zero transition, we all have a role to play. This report looks into how industry can work with the public to keep Solar in the spotlight.

Introduction

We know a lot has moved on since our 2022 research was published. There are now well over ten solar projects being explored publicly as part of the NSIP regime in the UK, most of which gravitate to similar locations with grid capacity[1].

We've also seen significant announcements in the 2023 Spring Budget, followed by further policy announcements through the British Energy Security Strategy and the Growth Plan. These ambitious plans for a fivefold increase in solar by 2035, up to 70GW, are backed up by the reassuring announcement that the Government will not be making changes to the categories of agricultural land that might constrain solar deployment.

Last year's report explored the public's views on solar development in their local area and how these have changed over time. However, another key facet of the story is how people's views change through the development cycle, and how we can be agile to lived experience.

Rolling out set solar targets comes with challenges. Many developers need to quickly acquaint themselves with the Development Consent Order process, and work hard continuing to harness public support in a sector with rapidly evolving technologies.

Support for solar grows throughout the project lifecycle and is at its highest when solar farms are operational.

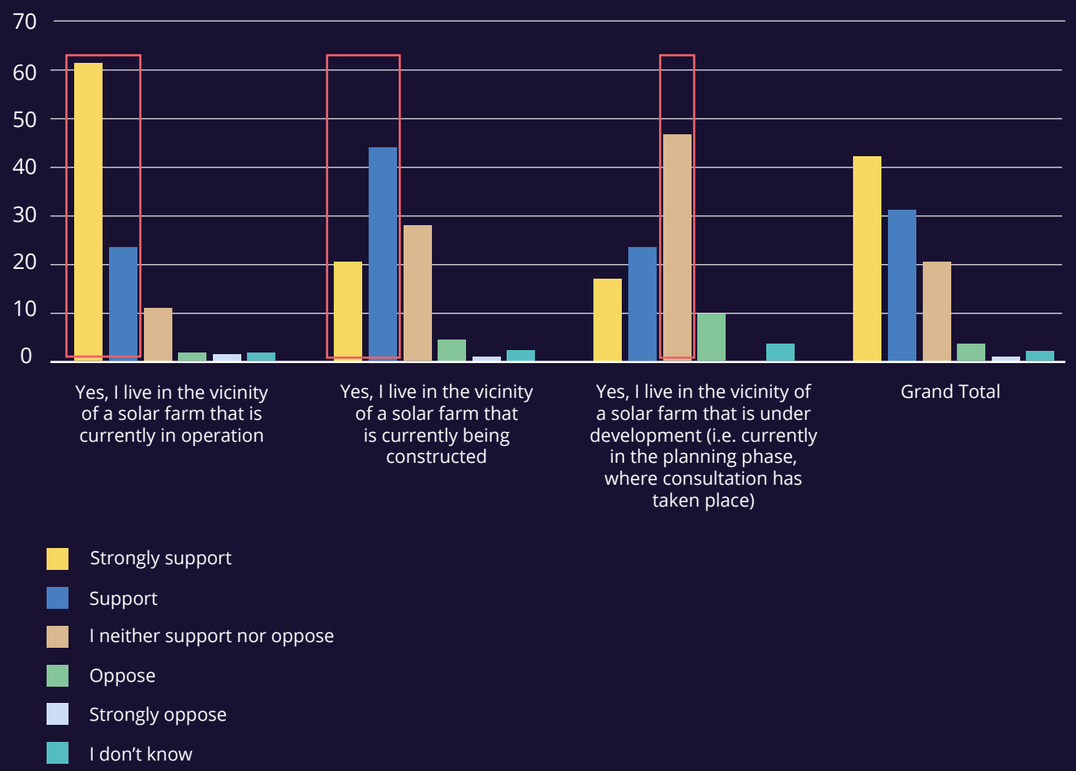
- Those living in the development phase of solar are markedly more hesitant to support solar, with only **17%** in strong support. By comparison, once sites are in operation the percentage of those in strong support jumps to **61.5%.**
- This tells us the uncertainty of development naturally leads to doubts, and this phase is where reassurance must be strongest.
- As the UK solar portfolio is built out, it will also be key that developers act responsibly, and the environmental benefits from solar are realised. This will ensure tangible examples exist of the opportunities commercial-scale solar provides are visible on a local level.

So how can we deliver quality solar projects at the scale needed and bring the community along for the journey?

A key challenge for the industry is harnessing support as the bigger projects come forward. To achieve community support, we need to make sure to learn lessons from the sites we've seen to date, and adapt as new issues arise from quantity.

[1]UK Government targets NSIP process reformation to cater for growing demand | Solar Power Portal

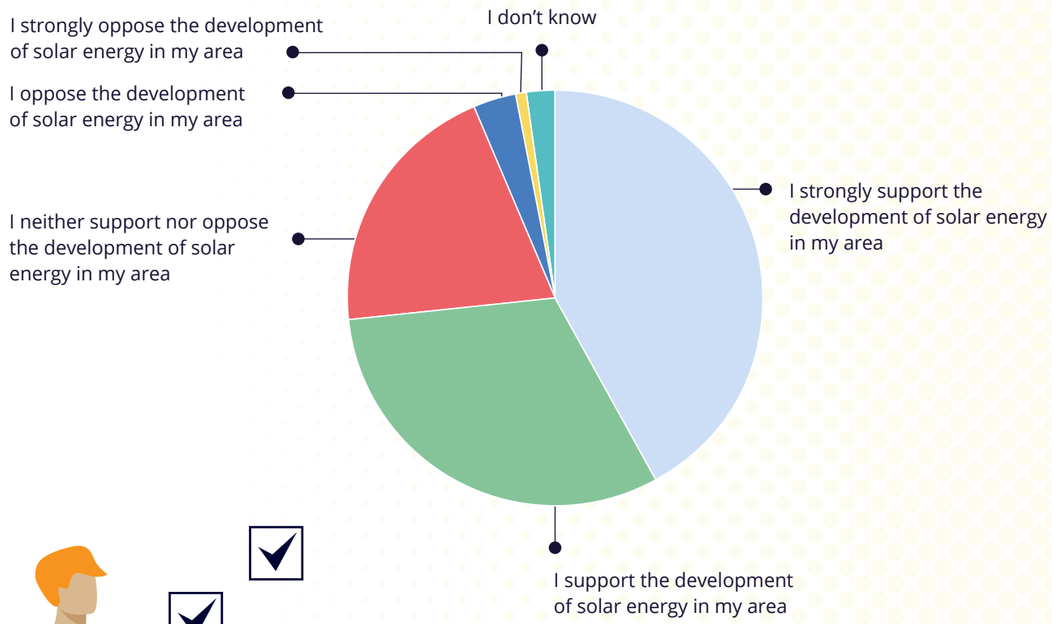
Do you live in the vicinity of a solar farm? vs support for solar farm



There is stability in support between 2022 and 2023

Despite the industry view recognising rockier moments in solar development throughout 2022, including being a key campaign point during the Conservative Party leadership campaign, public support has not only carried through but remains strong.

Public support for solar development in their local area



Public perception of the biggest drawbacks remains the same

As highlighted in Copper Consultancy's 2022 report and Solar Energy UK's 2023 report, Solar Habitat: A Look into ecological trends on solar farms in the UK, there is clear evidence that well-designed and well-managed solar can support wildlife habitats and meaningfully contribute to achieving national biodiversity targets.

However, the public still perceives the most important impact of solar farms is on local wildlife, with **27.5%** of respondents highlighting this issue.

What issues do you consider most important when developing a solar farm?

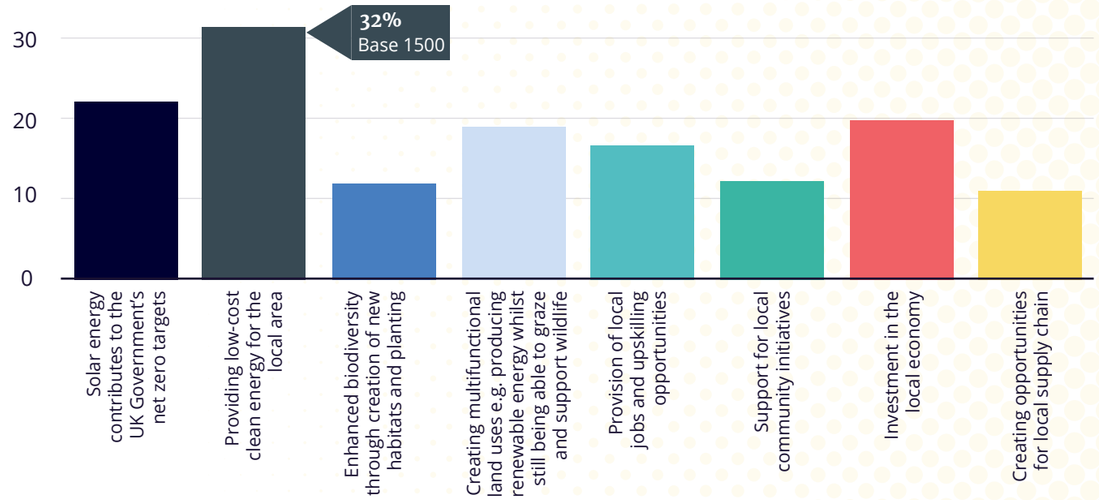
*horizontal axis shows number of respondents from 1500 total

The public sees providing low-cost clean energy to the local area as a key benefit

A difficulty with securing public buy-in for solar is that developments are often accused of having no direct benefits to the local community they impact.

32% of those asked highlighted the provision of low-cost, clean energy to the local area as a key benefit.

What would you consider to be the key benefits, if any, of solar energy in your local area?



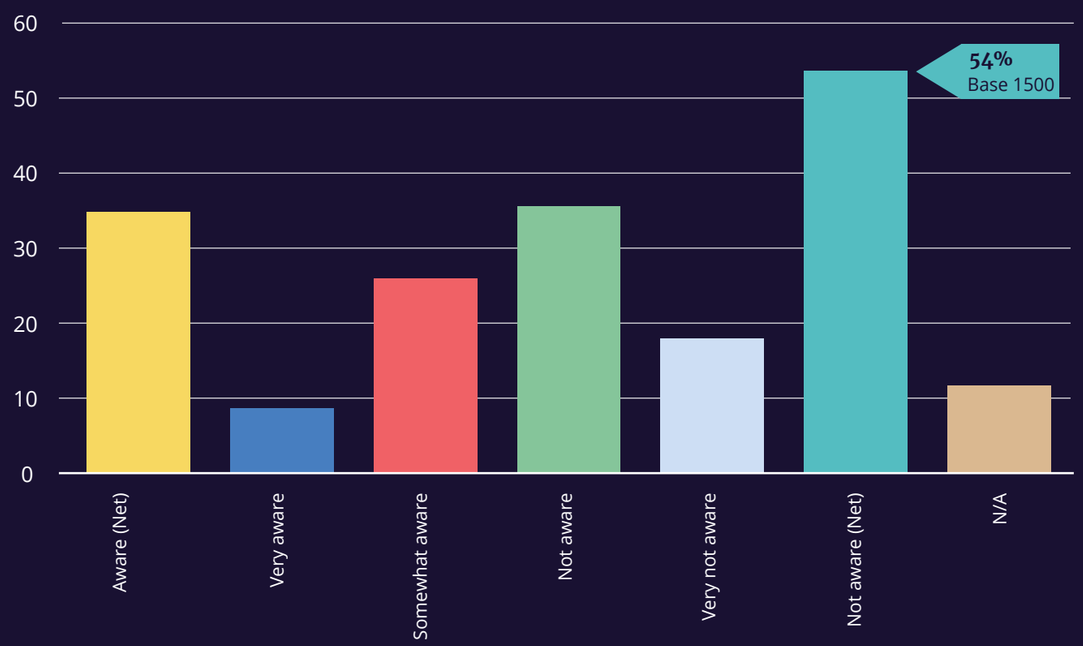
Misconceptions

The majority of people do not know the environmental benefits of solar

53% are not aware that solar farms can deliver Bio Diversity Net Gain on sites.

Limited public awareness of the benefits of solar farms remains a challenge.

How aware were you that, through careful site selection and planning, solar farms can deliver a net gain in biodiversity on site?



Case Study

Biodiversity Net gain with Downing LLP

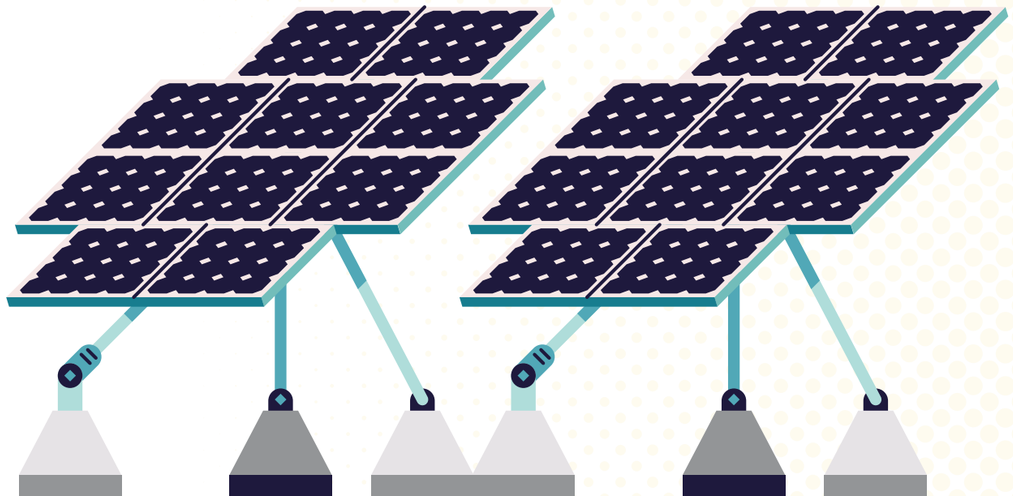
Downing LLP is a sustainable investment manager who commissioned Clarkson & Woods to undertake a biodiversity assessment of 19 of its ground-mounted solar farm assets in 2022.

The study showed that across 19 solar farms, a total of 1,419 habitat units and 237 hedgerow units are currently accommodated within the sites. For each site surveyed, recommendations were set out to improve biodiversity such as changes in grassland management, seeding of wildflower areas, planting of hedgerows/ trees and creation of wetland features (where appropriate). The calculations resulting from these enhancements showed a potential uplift of 505 habitat units and 54 hedgerow units; showing that solar farms offer ideal opportunities for biodiversity net gain.

Some sites offered greater enhancement opportunities than others and depending on the size of the site and the area within the lease agreement. For example, with some of the sites, the boundary hedgerows were outside the lease area and so could not be a focus for improvement. With many solar farms, easy gains could be made by changing the grazing/cutting regime or using fencing to restrict sheep grazing.

Other sites offered opportunities for wetland creation within areas outside of the footprint of the array, where soil conditions and topography were appropriate.

For more information on approaches to monitoring biodiversity on solar farms, please visit **https://solarenergyuk.org/resource/solar-energy-uk-guidance-a-standarised-approach-to-monitoring-biodiversity/**.

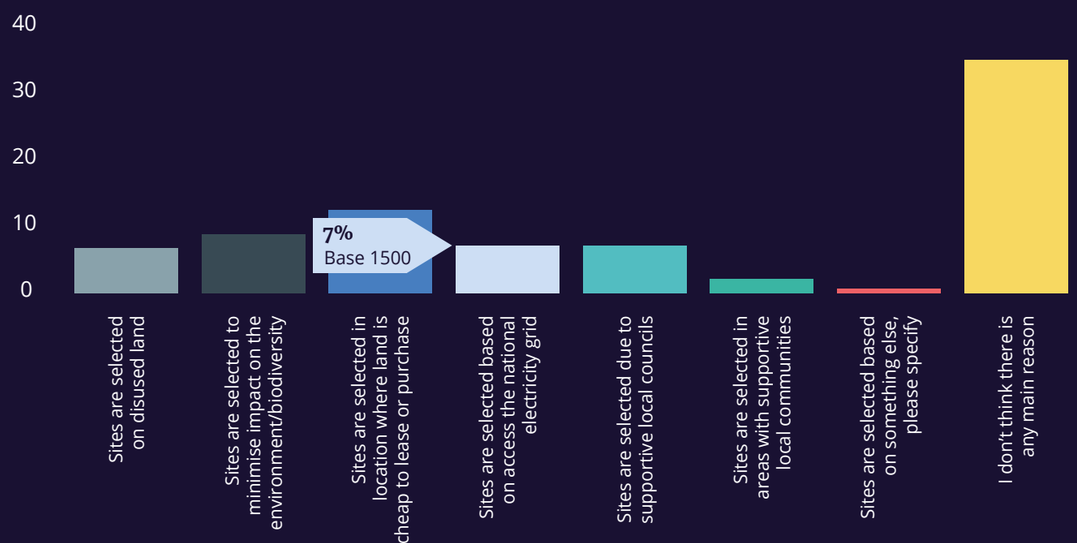


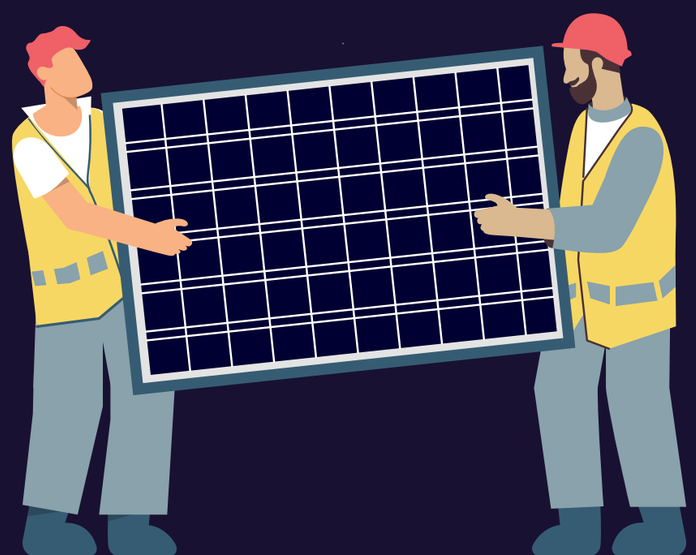
Cumulative impact

A third of people thought there was no main reason to why developers select prospective sites.

Only **7%** understood that the primary season for site selection is based on access to the national grid.

In your opinion, what do you think is the main reason, if any, developers select prospectuve sites for solar farms in the UK?





Will public attitudes change what happens at the polling stations?

Copper recently published a report on whether the next general election be won or lost on climate change. We learned that although voters are focused on what they are feeling and seeing now, policy on climate change could swing voters. Read the full report below.

Read the full report below.

Conclusions and recommendations

Public opinion regarding the primary advantages and disadvantages of solar energy varies significantly. While there exists a considerable amount of support, this positive outlook faces challenges due to insufficient knowledge and misconceptions.

Individuals express a strong desire to see increased adoption of rooftop solar within their communities and perceive the utilisation of land for multiple purposes as a noteworthy benefit of solar energy.

The public's aspirations extend beyond the mere development of solar power; they also anticipate the creation of employment opportunities, the acquisition of new skills and the emergence of a robust supply chain.

Public attitudes to the key benefits and drawbacks of solar energy continue to be as diverse as they were in 2022. High levels of support is threatened by a lack of awareness and misunderstanding.

Whats next?

Here are our five recommendations for the industry as we aim towards delivering the 70GW target.

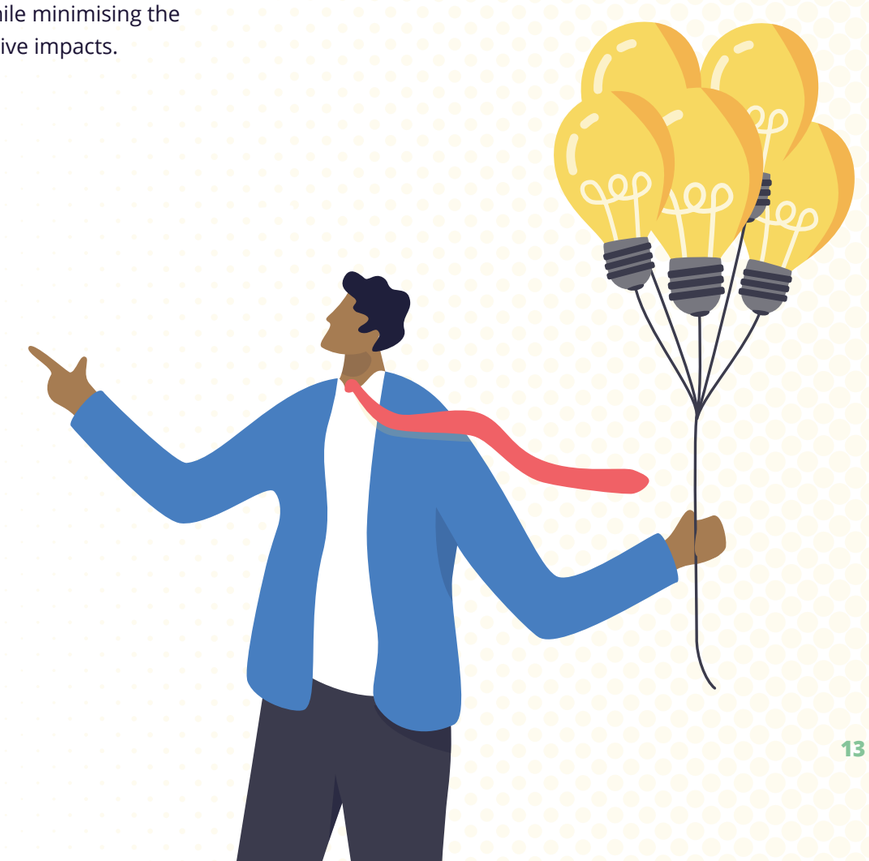
Continue to adapt as an industry and learn from previous project experience.

Better explain the benefits of solar and dispel the myths surrounding large-scale solar projects. Communicate solar as a solution to individual problems, including energy bills, alongside regional problems, including local authority net zero targets, jobs and skills.

Most people don't live near solar farms. Projects need to be built out correctly to assure people that future projects in their area will not impact them in the way they might currently perceive.

Keep working with the Government (and opposition parties) to make planning a smoother process for developers, communities and decision-makers.

Collaborate on maximising cumulative benefits of large scale solar while minimising the cumulative impacts.



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