

CHAPTER 11 – SOCIO-ECONOMICS, TOURISM AND RECREATION

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11 SOCIO-ECONOMICS, TOURISM AND RECREATION

Socio-Economics

Introduction

- 11.1 This chapter qualitatively assesses the potential impact of the Proposed Development on the baseline socio-economic situation of the local ward and County Council area where the Proposed Development is located. Impacts in relation to tourism and recreation within the ward and district are also assessed

Baseline Establishment

- 11.2 To identify the key components of the local economy, existing land use, tourism and recreational facilities in Carmarthenshire, a desk-based study using publicly available information has been undertaken. The study area for this was based on the administrative boundary for Carmarthenshire and, in particular, the Llanybydder ward in which the Proposed Development is located
- 11.3 The population of the Llanybydder ward recorded in the 2011 census is 2,807 within an area of 7,132ha, resulting in a population density of 0.4 people per hectare. It can be deduced therefore that this is a rural area. The resident population of Carmarthenshire is 183,800, listing it as the 4th highest populated county in Wales. The Llanybydder ward is the 28th lowest ward population in Carmarthenshire, and 15th lowest population density. It has the highest proportion of people aged over 45 and a higher proportion of Welsh speakers than the Carmarthenshire average.
- 11.4 Major employers in the area are Carmarthenshire County Council and Dyfed Powys Police. The social profile information indicates the County has a higher percentage of people in managerial, professional, administrative & intermediate occupations than Wales in general, and a lower percentage of people who have never worked & long term unemployed.

Predicted Effects

- 11.5 The Proposed Development has the potential to generate a range of direct and indirect economic benefits for local businesses as it is anticipated that a reasonable proportion of the cost of the civil, electrical and grid connection work will be spent locally or within the UK.
- 11.6 The Department of Energy and Climate Change (DECC) in their Review of the Generation Costs and Deployment Potential of Renewable Energy Technologies in the UK (2011) estimated the level of investment for a wind farm of >5MW to be between £1.18million and £1.82million per MW installed. Using the lower figure, the capital cost of the 4MW Proposed Development is therefore estimated to be £4.72m.
- 11.7 The Onshore Wind Direct & Wider Economic Impacts report (BiGGAR Economics 2012) noted that on average, 45% of construction costs were spent in the UK with 7% in the local area and 29% in the region based on data from the 18 case studies examined in the report. Average construction costs for the 18 case studies was £1.23 million per MW, towards the lower end of the DECC estimates of £1.18 to £1.82 million, and therefore higher than the £1.18 million figure used in the preceding paragraph in estimating costs for the Proposed Development at £4.72 million.
- 11.8 Relevant potential local contracts would be for services and materials such as the provision of aggregates for the construction of access tracks and foundations, plant hire and operators, and the transportation of construction materials. Local firms would be expected to have a competitive cost advantage due to the transportation costs being minimised. Other areas where local businesses may have relevant capabilities and experience (although not necessarily in wind energy construction) include site preparation works, access road construction, turbine foundation and hard standing construction, cable laying and electrical work, fencing, landscaping and security services etc.
- 11.9 The BiGGAR Report also estimated the 2011 turnover in the UK associated with wind farms in the construction stage to be £379 million, with £55million of this in the area local to the project and £246 million within the region of the project. This was based on construction costs covering the balance of plant, turbine and grid connection. Based on employment assumptions within the report, it was

estimated that for the construction values above there were anticipated to be 357 jobs locally (within the District) and 1,566 regionally (within the Region/Nation) either directly employed or created through the supply chain. For construction this gives a ratio of around 1 employee per £154,000 spent locally in the District and 1 employee per £157,000 spent within the Region/Nation. These were obtained by dividing the construction costs within the report by the anticipated jobs creation:

- District: £55 million ÷ 357 employees = £154,000/employee
- Region/Nation: £246 million ÷ 1,566 employees = £157,000/employee

- 11.10 However, such an investment at the construction phase is unlikely to provide significant benefits to the local economy, except in respect of labour and local construction service providers. Potentially up to 12 short term construction jobs could be sustained from the local area over the construction period, which would be no more than 8 months.
- 11.11 The construction of the wind energy scheme will not result in a fundamental change to the local population structure, local services or employment patterns of the surrounding area.
- 11.12 There is also the social cost of energy production to be considered in terms of carbon generation and the potential effects of global warming on society. The Renewable Energy Strategy 2009 identifies that onshore and offshore wind and biomass are potentially the most effective renewable energy sources for limiting carbon emissions in the longer term, and the 2006 report by the Sustainable Development Commission, the government's independent watchdog on sustainable development, notes that accounting for the social cost of carbon may reduce the system cost of wind power.
- 11.13 Whilst the small scale of the scheme and the potential for employment and income generation will be limited in the context of the overall County economy, the operation of the development will deliver significant localised benefits to the local economy, without any expectation of adverse effects to the social fabric of the area and its economy.
- 11.14 The proposed development also contributes to the goal of 'A prosperous Wales' as part of the Well-being of Future Generations (Wales) Act 2015.

Recreation and Tourism

- 11.15 Tourism is an important factor in Carmarthenshire and in 2019 generated £513 million to the local economy¹. Over 7.023 million tourist days were spent in the County with 1.121 million people staying in one of 1,200 establishments. The changes for 2008 - 2018 (%) are as follows:
- Economic impact: +63.5% (£326 million to £513 million in 2019); and
 - Visitor numbers: +14.2%.
- 11.16 The visual effects of the Proposed Development on the tourist and recreational attractions are assessed in the landscape and visual assessment included within Chapter 4 LVIA. Viewpoints assessed included the Brecon Beacons National Park, the Landscape of Outstanding Historic Interest and some of the surrounding distinctive upland areas. It was concluded that the visual impacts of the proposed turbines on visual amenity are likely to be greater within close proximity to the Site, and from more distant viewpoints the visual impact of the proposed turbines reduces as surrounding vegetation screens views and the turbines themselves become less readily discernible within the diverse and accommodating landscape. From within the study area the surrounding undulating landform that forms the skyline, would continue to form the focal points of the views.
- 11.17 There are several country, coastal and woodland parks in Carmarthenshire providing recreational opportunities. These include the Country Parks of Gelli Aur, Llyn Llech Owain and Pembrey; the woodland park of Mynydd Mawr, and the Millennium Coastal Path and Park at Llanelli.
- 11.18 Carmarthenshire also contains an extensive network of Public Rights of Way, with an estimated annual economic value of the network £40m (CCC, Public Rights of Way Improvement Plan for Carmarthenshire, 2007-2017). This network includes:
- 2,087km footpaths;
 - 150km of unclassified roads (Green Lanes) with vehicular rights;
 - 85km of bridleways;
 - 64km of Byeways Open to All Traffic, including motorised vehicles;

¹ <https://www.carmarthenshire.gov.wales/home/business/tourism/research-trends-development/#.YDPOUtVxeUk> (Last accessed: 22/02/21)

- Cycleways provided as part of the National Cycle Network, including off-road sections at the Millennium Coast Park (25 km) and Llanelli-Cross Hands (19km);
- 50km of Permissive Access on Tir Gofal/ Agri-environment funded schemes, primarily for walkers;
- 'Lost Ways' not currently shown on the PROW Definitive Map but which may have public rights.

11.19 The Brecon Beacons National Park is 18.5km to the South East will have limited views of the Proposed Development along the Beacons Way Long Distance Path. The Landscape and Visual Impact Assessment considers a view from this Right of Way and concludes that although the receptors are considered to be of high sensitivity, the magnitude of change would be negligible. The significance of effects on visual amenity is therefore considered to be low to negligible adverse and not significant.

11.20 Other attractions within Carmarthenshire include:

- The beaches to the south of the County;
- The National Botanic Gardens of Wales;
- National Trust property, Newton House, Dinefwr near Llandeilo;
- Castles (including Carmarthen, Carreg Cennen, Dinefwr, Llansteffan and Kidwelly);
- The Carmarthenshire County Museum located in Abergwilli;
- Forestry Commission Wales woodland sites at Pembrey, Brechfa Forest, and the Towy Valley Forests (Pen Arthur, Llywynywormwood and Cilgwyn); and
- Mountain bike trails at Brechfa Forest.

11.21 Due to the undulating landform none the above features are likely to be affected by the Proposed Development.

Evidence of Effects of Wind Energy on Tourism

11.22 Concerns are often raised regarding the effects of wind energy schemes on local tourism. Although it is difficult to predict tourists' responses to wind turbines,

research has identified that there is no existing or emerging evidence to suggest that tourism suffers as a result of wind farms or wind turbines.

- 11.23 There have been several surveys and reports investigating wind energy and tourism conducted by reputable poll companies and consultants. The results from all these surveys demonstrate that the effect of wind farms on tourism is negligible at worst, with many respondents taking a positive view to wind farms, and saying it would not affect their likelihood of returning to an area.
- 11.24 Historically, as far back as 2002, public attitude surveys such as that carried out by Centre for Sustainable Energy and Quality Fieldwork (2002), MORI poll in Scotland (MORI Scotland 2003) the Moffat Centre Survey (2007), the BWEA survey (2002) demonstrate the largely positive or neutral impacts of wind turbines on tourism. To date, there is no evidence to indicate that wind turbines are detrimental to tourism.
- 11.25 The Review of Energy Policy in Wales by the Economic Development Committee (January 2003) states that there is no objective evidence available as to whether wind turbines increase or decrease tourist interest in an area. It goes on to say: "There have been several different surveys in other areas which generally report that the majority of people are not influenced one way or another by the presence of windfarms".
- 11.26 In 2007, the Moffat Centre undertook a study of the economic impact of wind farms on the Scottish economy, the objective being to provide guidance on assessing the economic impact of wind farm developments and related infrastructure on tourism.
- 11.27 Part of the research involved the interviewing of 380 tourists at locations that maximised the likelihood that respondents would have seen a wind farm during their visit. This found that 39% of respondents were positive about wind farms, 36% had no opinion either way, and 25% were negative. Importantly, respondents that had seen a wind farm were less hostile than those who had not. The results confirm that a significant minority (20% to 30%) of tourists preferred landscapes without wind farms. However, of these, only a very small group were so negative that they changed their intentions about revisiting Scotland.

- 11.28 In general the research found that the negative impact of wind farms on tourism at a national level (Scotland) was small, even large sites have a minimal impact on tourism.
- 11.29 Professor Aitchison of the University of the West of England undertook research to provide information for a public inquiry for a proposed wind farm development at Fullabrook, North Devon in late 2006/January 2007 (Aitchinson, 2007). Part of this research involved the interviewing of 379 visitors to areas around two wind farms in Cornwall and two in mid-Wales. 87% of the people interviewed considered that the development of a wind farm would neither encourage nor discourage them from visiting the area. Of the remaining 13%, just over half thought that a wind farm would encourage them to visit an area. The survey also found a broad support for renewable energy schemes in general.
- 11.30 Other windfarms without visitor facilities are also popular with tourists, and there is often a demand to provide information boards and location details on tourist websites.
- 11.31 The type of tourist may be an important factor to consider e.g. fell walker, surfer, business visitor, golfer, mountaineer.
- 11.32 In more recent years there has been a raft of similar public attitudes surveys on the effects of wind energy schemes on public opinion and tourism. These have culminated in the publication in April 2014 of the Department for Energy and Climate Change Public Attitudes Tracker. The latest version of the tracker (11th February 2021) stated that 81% of people are concerned about climate change and 78% of people said they support the development of renewables (including onshore wind) – compared to only 3% in opposition.
- 11.33 In the survey, the public ranked energy security and climate change jointly as the fourth biggest challenge facing the UK today - only unemployment, inflation and the NHS scored higher in the list. Tellingly, those polled judged energy and climate change to be more important challenges than education, law and order, taxation, defence and national security.
- 11.34 For future wind energy schemes, the judgment of acceptability based on landscape protection will provide ample protection for the protection of tourism. The threshold of landscape protection is more sensitive to wind farm development

than tourism, therefore if the project is deemed to be acceptable on landscape at the planning stage, it follows that it should be considered acceptable in relation to the predicted effect on tourism.

- 11.35 In short, tourists can be expected to react to wind turbines in the same manner as any other member of the public, and the presence of a wind energy scheme does not result in tourists avoiding an area and there is no evidence that renewable energy schemes are a detraction from tourism interests. Overall, the above results and reports demonstrate the largely positive or neutral effects of wind energy schemes on tourism.

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