

# Executive Summary

## Purpose of the Report

- i. Regeneris Consulting and The Tourism Company were appointed by the Welsh Government to carry out a study of the potential impacts of onshore wind farms and associated grid infrastructure on the visitor economy within Wales. This is a controversial and hotly debated topic. The issue has been brought into sharp focus by the potential for a fourfold increase in installed capacity by 2025, although in practice it may be much less than this.
- ii. The study has not sought to quantify the total economic impact on tourism, in terms of jobs and GVA, given the technical challenges of doing this in a rigorous way (but also given the available timescale for the study). The study has taken a bottom-up approach, which draws upon the existing evidence of tourism impacts of wind farms and identifies those areas which are likely to be most sensitive to wind farm development and those areas where the potential for positive effects is greatest.
- iii. The key tasks included:
  - A **review of the literature** exploring the relationship between wind farm development and the visitor economy. This was used to develop a framework for assessing the sensitivity of tourism economies to wind farm development.
  - An **analysis of the visitor economies** in nine local impact areas affected by wind farm development. This identified the scale and nature of development, the key tourism assets and the characteristics of visitors. This analysis formed the basis for the assessment of sensitivity.
  - Three **case studies** in areas which are already affected by wind farm development. The purpose of these case studies was to gather evidence of existing impact and to test the framework for assessing sensitivity to wind farm development. The case studies drew upon local research where it was available, and a set of structured consultations with local tourism trade associations and local authority tourism officers. Whilst these consultees provided views for their particular communities and stakeholders, these views were also tested through consultations with businesses in close proximity to existing wind farms or catering for visitors most likely to be affected.

## Key Findings

### Negligible impact on the national tourism sector

- iv. The current scale of wind farm development in Wales is modest, especially when compared with other European countries, including Scotland. National studies of tourism impacts of wind farms have shown that, where negative effects do occur, these are often in the form of displaced tourism. This is likely to be the case in Wales, where substantial areas of the country will remain unaffected by wind farm development.

### Limited evidence of local tourism impacts to date.

- v. There are a number of areas in Wales where wind farms have been an established presence on

## ●Tourism Impact of Onshore Wind Farms in Wales ●

the local landscape for a relatively long time. These include Powys, Anglesey and the South Wales Valleys which were all the subject of case studies. The case studies have not revealed any evidence of significant impacts on tourism to date. The few local studies which are available have shown the majority of visitors are positive or indifferent about wind farm development. Although there was some anecdotal evidence of visitors staying away due to wind farms, the vast majority of consultees believed there had been no impact on total visitor numbers and hence on the visitor economies as a whole.

### Wind farms are remote from Wales's key visitor assets and tourism locations

- vi. The study has shown that the areas most affected by wind farms (currently and in the next decade) account for a very small proportion of Wales's total visitor economy. This is likely to be an indirect consequence of planning policy focusing development away from Wales's key natural assets and visitor attractions, including areas of outstanding natural beauty and national parks.

### Reactions to wind farms are complex and may change over time

- vii. The evidence base shows a clear majority of people do not react negatively to wind farm developments or change their visiting behaviour as a result. However it also shows that visitor responses and reactions to wind farms are highly subjective and depend on the individual's own judgements and perceptions of the relative merits of onshore wind as a means of energy production.
- viii. While current levels of support for onshore wind are strong, there are a diverse range of factors which could influence public perceptions over the next ten years which could then change visitor behaviour. The greatest risk is that the increased rate of development in some parts of Wales could change the value judgements made by some visitors, especially if they feel a tipping-point is reached. However, the study has not found any evidence to suggest this could occur in practice.
- ix. This risk also needs to be weighed against the fact that wind farms will become a more common sight in the UK and across Europe. This increased familiarity with turbines is likely to mean that many visitors become more tolerant of turbines as a feature of rural landscapes, and their visiting behaviour may change little as a result.

### Higher sensitivity to wind farms for certain visitor markets

- x. There are examples of certain locations which are more sensitive to wind farm development on account of their landscapes, types of visitor, limited product diversity and proximity to wind farms. This is particularly the case where the key visitor markets are older people visiting for the tranquillity, remoteness and natural scenery offered in some parts of Wales. Remoter parts of Powys are the most notable examples of where this may be the case. In these locations, the study has concluded that the potential negative effect on visitor numbers may still be low overall, but in some circumstances could be moderate. But these findings are still subject to various aspects of uncertainty and need to be explored on a case by case basis for schemes going through the planning system.
- xi. Although these areas account for a small proportion of tourism employment in Wales as a whole, the narrow economic base in these areas means the sector is an important source of local employment and income

### Some potential for positive impacts, often requiring further investment

- xii. Although a number of studies point to the potential to attract visitors to areas containing turbines, there is little evidence that these positive effects occur in practice. There may, however, be some instances where wind farm development could enhance existing visitor attractions or be an attraction in their own right through investment in related visitor facilities. There may be particular opportunities for areas which attract a large number of day visitors and have large catchment populations in close proximity such as the South Wales Valleys or North Wales. The case studies showed there was enthusiasm for these types of projects among local stakeholders and an opportunity to make better use of community benefit funds to achieve economic development goals.

### No evidence that wind farms on visitor routes deter tourists

- xiii. There are a number of visitor routes which will be in close proximity to large concentrations of turbines. The general survey evidence presented in this study offers the only proxy for how visitors would react to these wind farms. This shows that small minorities of visitors would be encouraged, whilst others would be discouraged. Overall, however, there is no evidence to suggest that there would be any significant change in visitor numbers using these routes to reach destination elsewhere.

### Negative impacts during construction

- xiv. The study has not shown there to be any evidence of a fall in visitor numbers as a result of disruption during construction. However, this was identified as a concern for many businesses in the case studies, particularly in relation to noise and traffic, and the closure and diversion of public footpaths or other popular routes. Given that some areas in the study could be affected by construction of wind farms for a number of years, it is vital that these disruptions are minimised and mitigated wherever possible through the planning process. There are also several examples of rights of way or trails which were enhanced during construction, and these improvements should be communicated to locals and visitors.

### Associated infrastructure

- xv. The evidence base for tourism impacts of associated infrastructure is far less developed than that for wind farms. The few studies which have addressed the subject have focused on visitors' opinions of pylons, which consistently find that reactions are far more negative than toward wind turbines. This strong feeling toward grid infrastructure presents an increased risk for those areas where new pylons are proposed alongside considerable wind farm development, particularly North Powys. However, there is no evidence that the existing National Grid infrastructure which is concentrated in North and South Wales, often in popular scenic areas, discourages visitors.
- xvi. Nevertheless, the lack of robust evidence means the assessment of the potential impact of the proposed supporting grid infrastructure is particularly challenging. The proposals by National Grid will now see a significant proportion of the connection to the grid buried underground, including the section which crosses the Glyndwr's Way. This would reduce the visual impact upon one of North Powys's key visitor asset and mitigate potential impacts.

## Recommendations

### Land Use Planning Considerations:

- Planning Policy Wales requires Local Planning Authorities (LPAs) to quantify and take on board the economic impacts of proposed developments and is clear that LPAs should consider employment in all sectors (including tourism) and factor this in to the decision making process. However, assessing effects on tourism can be challenging and subject to uncertainty. This points to the need for improved guidance which should be considered by Welsh Government. The assessment framework which has been used in this study may provide a helpful tool in developing this guidance.
- Although most local tourism economies will face minimal or no threat from wind farm development, the nature of visitor economies in some areas does mean they are at greater risk of negative impacts. In these instances, there is a need for developers to undertake thorough research and consultation to understand the nature and extent of the threat, the potential opportunities (if relevant) and any actions which need to be taken. The emphasis should be upon reaching agreement on these issues with the local tourism partners, where this is possible, prior to submission of the planning application.
- The study has concluded that there is the potential for future wind farm development to have minor or even moderate negative impacts on the visitor economies of some localities. However, this conclusion is nevertheless subject to a degree of uncertainty and for this reason it will be helpful to monitor the actual impact of new development upon the scale and character of tourism in those areas where there are significant concerns. Given the shortcomings in visitor data at this localised level and the wide range of factors which influence the visitor economy, it will be important to agree a suitable approach to do this.
- Whilst the potential impact of onshore wind farms on the visitor economy was not a criteria in the selection of the strategic search areas within the TAN 8 policy (although the impact on landscape was), there is merit in it having a more explicit role in informing locational choices for any successor policy. The reason for this is that as the additional generation capacity associated with TAN 8 is implemented, the potential consequences of any further development in these areas on the local visitor economy would need to be carefully considered.

### Maximising Opportunities and Minimising Dis-benefits

- The development of renewable energy in general and wind farms more specifically provides some opportunities for linked tourism development. The more significant opportunities for generating additional economic benefit impact are linked to new visitor attractions and likely to be few in number. They are more appropriate in locations with large day visitor catchments, good accessibility and a significant degree of complementarity with the local tourism strategies.
- In other instances, there will often be small scale opportunities to improve the visitor offer in close proximity to and linked to a wind farm development, including all weather access, signage and way marking, and information boards. Where landscape and habitats are being improved as part of a wind farm development, this may provide some opportunity to share information with visitors as a point of interest and to raise awareness.

## ●Tourism Impact of Onshore Wind Farms in Wales ●

- In other instances, it is important to minimise the potential for disbenefits during construction periods. This includes rerouting public access, clear signage and effective communication of disruption.
- In all of these instances, the scope to link public sector resources (Rural Development Programme and ERDF, for example) with community benefit payments from wind farm developers in creative ways should be explored. This provides potentially important way of providing additional resources to support local, often rural economies

### Tourism and Economic Development

- Where a clear link can be established between a specific wind farm development and the likelihood of significant negative impacts upon the tourism economy, this would need to be mitigated through the planning approval.
- Although in other instances wind farm developments are far less likely to result in significant negative impacts, they are nevertheless seen by the tourism sector and other stakeholders as significant threats and may actually discourage some private sector investment as a consequence of the associated uncertainty. There is a role in these areas to use community benefit funds, where they are available and matched by public sector resources, in a much more strategic way to support the tourism sector.