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Subject: Potential impacts of the NDF RE proposals on tourism
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Attachments: [Impact of windfarms on tourism.doc](#)

As requested at the Newtown engagement sessions have attached a note on research into potential impacts of windfarms on tourism and in particular the research carried out by Regeneris and The Tourism Company for the WG on this particular issue. Tourism is a very important aspect of the economy in Montgomeryshire (some 12% of Powys GDP) and this is the area where I m best acquainted with the tourism offer so my comments have a regional perspective. Large solar farms are relatively newer in Wales and there is no body of research on potential impacts although there could be a correlation with landscape issues.

As noted in the preamble, I am able to send electronic copies of most of these documents if you are unable to access them so please do not hesitate to ask.

Kind regards

Jill Kibble

Chair Tourism Committee

Tourism and Windfarms

A body of evidence has been produced around the potential impacts of windfarms and Grid connections on tourism and local economies. The majority have been commissioned by the Renewables industry to support their case of no adverse impacts. Much of this work has been carried out by Professor Aitchison on behalf of the Renewables industry but has been academically discredited on grounds of small sample size; lack of peer review; location non-specificity, and inappropriate extrapolation of data from both type of visitor and location.

There is no post -construction research of sufficient size or rigour to be serviceable.

Research in Wales is more helpful. NFO World Group research¹ for the Welsh Tourism Industry remains reasonably reliable using a rural / coastal cohort of visitors where 23 % had an antipathy to a windfarm in the landscape increasing to 54% when there was more than one. The research also identified that off-shore was preferred to on-shore development and the top three reasons for visiting Wales were: unspoilt views of countryside and coast; opportunity to enjoy expansive unspoilt nature and peace and quiet. At the time of this research windfarms were small and very few, and turbines were less than 100m high. However, the results were such that the Welsh Tourism industry expressed considerable concern at possible proliferation.

There is plenty of anecdotal evidence relating to holiday parks being unable to sell lodges; falling numbers of walking and horse riding visitors and accommodation providers having to reduce room rates from both Wales and Scotland² but the only more current research relating specifically to Wales was carried out in 2014 at the instigation of the Welsh Government.

Please find attached a note on the results, particularly as they relate to Montgomeryshire (North Powys) as am most familiar with the tourism economy of this area and would not wish to misrepresent the interests of other parts of Wales. However, it is clear that the potential for adverse impact on a growing tourism economy based on the wonderful and varied upland landscapes is far from inconsiderable.

If you have any problem finding original documentation I would be able to provide most electronically.

¹ Impact of Windfarms on Tourism to Wales. NFO World Group for Welsh Tourism Board 2003

² Economic impact of windfarms on Scottish Tourism Glasgow Caledonian University 2007 indicated annual tourism income would be £7.6 million lower than if there were no windfarms.

Study into the Potential Economic Impacts of Windfarms and associated Grid Infrastructure on the Welsh Tourism Sector - A report for the Welsh Government prepared by Regeneris Consulting and The Tourism Company (2014)

1. Regeneris are clear in their assessment that because of the nature of tourism and the tourist attraction in the North Powys area there is considerable sensitivity to windfarm development and vulnerability to reaching a 'tipping point'.

2. The Study

This study was commissioned by the Welsh Government, dated February 2014 and released 4th April 2014.

2.1 The Regeneris study includes a brief overview of existing research. Unsurprisingly there is a lack of recent, peer reviewed, robust post construction data as most of the research has been commissioned by renewable energy companies who have no interest in the impacts of a windfarm once built. The predictive studies exhibit variable methodology and analysis. The Regeneris report makes clear the dangers of using one area as proxy for another, even within Wales.

2.2 There is a review of windfarm development in Wales. Figs. 3.2 and 3.4 clearly show the considerable imbalance of proposed development weighted towards North Powys (TAN8). This is of particular concern given that Regeneris go on to demonstrate that the characteristics of tourism in North Powys are such that the area is far more sensitive to windfarms than most other parts of Wales.

2.3 The authors carry out some limited primary research in the sample areas of North Anglesey, Rhondda Cynon Taff, Neath Port Talbot and North Powys.

2.4 **Study Conclusions.** The Report concludes that nationally the current, relatively modest scale of Welsh windfarm development offers limited guidance as to impact on tourism given the level of potential development despite some anecdotal evidence from North Anglesey that turbines are deterring visitors (7.49). Regeneris assume some '*tourist displacement*' from areas with windfarms but that visitors may go elsewhere in Wales so nationally tourism levels should hold. There is, however, no justification or evidence for this assumption; it is equally feasible that visitors will go to other areas of the UK where on-shore windfarm development is very carefully controlled and requires the consent of local communities.

2.5 No robust evidence is brought forward to show windfarms attract visitors. A limited potential for day visitors from proximate, large conurbations to the South Wales windfarms is considered possible if visitor centres are built. In other parts of the UK all but one such centre³ has closed due to low numbers (e.g. Delabole, Cornwall)

³ Glasgow which encompasses a substantial Glasgow University science site; cafe; conference centre; school study centre etc.

2.6 Study Conclusions. North Powys (SSAC & B)⁴: Here the situation is assessed as being rather different: *'The scale of the development combined with the visitor profile and wilderness offer of this study area leave it **more sensitive to windfarm development than other parts of Wales** ... there may be less potential for replacement of visitors than other areas.'* (7.68 and conclusions)

2.7 Regeneris go on to state that, *'The scale of development and dense clustering of windfarms were considered to increase the potential for adverse reactions.'* (p.120)

2.8 The report does not seek to quantify impacts beyond the assessment of *'moderate'* for North Powys visitor types (Section 7 conclusions). Regeneris consider there is a risk that visitor reactions will become more negative over the next 10 years where visitors may feel a *'tipping point'* has been reached in areas such as North Powys with a high rate of development. The very large areas now identified for Priority Areas must be of great concern to tourism given this point.

3. North Powys study area . The Regeneris desk study is far from exhaustive but, unlike some developer reports⁵, does correctly identify the tourist attractions of the area. The assessment of likely impact reflects that of the Welsh Tourist Board back in 2003.

3.1 Certain visitor markets are much more sensitive to windfarm development. North Powys visitors enjoying the *'dominance of the natural environment'* and the *'importance of tranquillity', 'remoteness and feeling of isolation'* are all cited by Regeneris (6.145).

3.2 The unreliability of extrapolating tourism impacts from one area to another is evident through a comparison of the *'sensitivity'* ratings for the areas of Wales considered by Regeneris in this study and summarised in tables (pp120-130).

3.3 Sensitivity. North Powys is assessed as having higher sensitivity to windfarm development than other areas in Wales due to:

- landscapes
- type of visitor
- high percentage of repeat visitors
- limited product diversity
- proximity to windfarms

3.4 Regeneris conclude (e.g. at 7.53) that tourism is an important source of local income and employment.

3.5 Regeneris state *'that businesses (in North Powys) may be sensitive even to small changes in visitor numbers as a result of windfarm development and there may be a particular challenge for them replacing those visitors who are deterred.'* (8.6). This makes the point of potentially far reaching consequences of even a small reduction in visitor numbers.

⁴ For the avoidance of confusion, this Note uses North Powys throughout to represent both the former SSAC & B study areas (unless otherwise indicated) as both are geographically in North Powys.

⁵ For example Tourism Study of Prof C Aitchison for RES (Llanbrynmair) CPI doc.

- 3.6 **Construction** (7.62 and conclusions) . Noise and disruption are of particular concern to tourism businesses. Regeneris found construction of one small windfarm had little adverse impact but recognise that concurrent construction of a number of large windfarms could have a different result. The long construction period predicated for North Powys is of particular concern with the disruption, closure / diversion of popular trails, walks and bridleways.
- 3.7 Regeneris assess that any congestion will impair accessibility and is likely to deter visitors given the limited road capacity in the area. They do not take into account the concurrent installation of substantial transmission infrastructure, necessary alterations to rural roads unsuitable for AILs and HGVs and abnormal clear felling operations. This concurs with the study carried out by Capita Symonds for the WG and Powys County Council regarding transport and the Mid Wales project.⁶
- 3.8 **Infrastructure.** Given the absence of any available Grid connection or capacity in North Powys Regeneris note a consistently negative reaction towards pylons. They consider (p.3 xv): *'This strong feeling towards Grid infrastructure presents an increased risk for those areas where new pylons are proposed alongside considerable windfarm development, particularly North Powys'*. Regeneris indicate there is no evidence of existing South and North Wales pylon lines discouraging visitors but equally, there is no evidence they do not and no precedent for the concatenation of turbines, transmission lines (132 and 400kV), transformer stations and transmission lines proposed for North Powys.
- 3.9 Undergrounding of 400kV lines is considered some mitigation for example to the impact on the *'key visitor asset'* of Glyndwr's Way (p.3 xvi). The alternative of two parallel double pole 132kV lines would detract materially from the currently unspoilt landscape.
- 3.10 The report does note that public appreciation of the benefits of technologies such as mobile phones, wind energy, electricity transmission does not necessarily equate to acceptance of mobile phone masts, wind turbines or pylons in otherwise unspoilt and attractive landscapes (5.58)
- 3.11 **Investment.** Discouragement of private sector investment as a result of windfarm development is seen as a significant risk factor (p.137). This is likely to disproportionately impact on tourism business investment.
- 3.12 Regeneris found that business owners do not perceive community benefits or other 'mitigation' as offering any real opportunities or recompense for lost trade (7.73). This echoes the earlier research carried by Cardiff University Business School which specifically demonstrates the ineffectiveness of community benefits from windfarms as economic drivers in Welsh rural communities.
- 3.13 **Visitor types:** Many visitors, particularly the 'discerning' higher spending retired and young professionals, who constitute over half the North Powys visitor demographic, see the area as an *'alternative to busier parts of Wales'* (6.76). The Powys strategy of promoting staying visitors, year round and higher value tourism

⁶ Powys Windfarms – Access Route Study Capita Symonds 2008

rather than increasing numbers reflects the desire to preserve this important distinction (7.58).

- 3.14 Regeneris note (6.146) that the important asset of Glyndwr's Way⁷ is in close proximity to many of the proposed windfarms (this was the case for SSAs but is even more starkly so for PAs) such that turbines will be perceived to be the dominant feature to the walker over a considerable distance. This would seriously detract from the qualities of a panoramic and tranquil natural landscape which walkers expect on a National Trail. Rambler's Cymru have unequivocal views on the deterrent effect of windfarms on walkers and surveys by MCoS with long distance walkers show that some 60% state they already are, or would, avoid areas with windfarms. The BHS have shown a similar antipathy amongst equestrians where there is an added element of danger.
- 3.15 Regeneris identify that older people form a significant proportion of North Powys visitors and are more likely to be sensitive to windfarm development (8.4). This market sector is generally higher spending, repeat visiting and less seasonal providing a stable and lucrative client base.
- 3.16 Regeneris consider: *'it may be more difficult to attract other tourists to replace deterred visitors'* where the type of visitor is more susceptible to landscape change (section 7 conclusions).
- 3.17 Regeneris note that Montgomeryshire countryside is seen as *'unique'* within Wales (p.118) and draw analogies with tourism in parts of rural Scotland and Northumbria (p.115). An illuminating analogy given the increasing concern of Visit Scotland regarding walkers and the cessation of on-shore wind construction in England without majority local support.
- 3.18 The report notes that North Powys businesses perceive windfarms as the dominant threat. Some windfarms have had to be accepted although businesses and many visitors would prefer not to have them. More and larger turbines and associated infrastructure are considered the 'tipping point' for tourism.

4. Crucial Limitations. Regeneris primary research is extremely limited and insufficient detail is provided to assess validity. The study area was restricted and interviewees consisted of nine businesses and PCC Tourism Officer/s (7.51-2). Visitor interviews were not conducted and there are some significant errors and omissions. When all relevant factors are fully taken into account it is clear the magnitude of impact could be much greater than Regeneris identify.

4.1 The number of businesses and staying visitors who will be affected are seriously underestimated and misrepresented in North Powys (6.65-6 and 7.53). There are over 4760 holiday Park homes, 320 touring pitches, 66 guest houses/ hotels and 153 self-catering units within a 15km radius of the two SSAs. It is reasonable to take into

⁷ Benefits to Businesses of National Trails in Wales The Tourism Company 2006
Economic Importance of Outdoor Activity Tourism in Wales Miller 2014 gives an estimate of £481 million pa

consideration a wider area as providing the entirety of the setting for the enjoyment and activities of the visitor. Furthermore, holiday homes will not be located on open upland plateaux but are sited unobtrusively in well wooded valleys nearer to facilities. Limited accommodation in the uplands does not equate to a lack of tourists appreciating those tranquil, unspoilt areas.

- 4.2 Regeneris do point out how North Powys visitors tend to stay within the locality rather than use it as a wide touring base (7.55). By omitting holiday park homes from consideration, Regeneris also miss the fact that an unusually high 10% of visitors own holiday homes and make a very significant contribution to the local economy.⁸
- 4.3 This high percentage of holiday home ownership along with older people and young professionals without families and the high number of day visitors means that tourism is far less seasonal than some areas of Wales.
- 4.4 Due to these omissions the Regeneris report also significantly underestimates tourism income and dependent jobs. Neither does it take into account that Montgomeryshire provides over half the tourism income to Powys and thus underestimates its importance to the Powys economy.
- 4.5 Walkers⁹ and cyclists are correctly identified as an important visitor market but the considerable number of horse riders, both staying and day visitors are completely omitted. This is a market sector uniquely impacted by wind turbines. Bridleways (including sections of Glyndwr's Way) and the National Prince Llewellyn, Cross Wales and Great Dragon Rides all pass through proposed turbine fields. Many riders avoid turbines and businesses would no longer be able to promote these trails.¹⁰
- 4.6 No consideration is given to the culturally rich pre-historic landscape of the area the integrity and understanding of which would be severely damaged by the construction of windfarms. The relatively unchanged landscapes of the uplands make the area of special importance.
- 4.7 Regeneris correctly state that tourism was excluded from consideration when defining SSAs (p.136) and that tourism should be factored into any review of TAN8 and all planning decisions. This assessment is not within the evidence base for PAs.
- 4.8 Limitations in the consideration of construction impacts are outlined at 2.6 above. As Capita Symonds assessed, there would be 5 – 7 years of disruption resulting from the proposed construction. The larger and more widespread PAs will obviously result in even greater disruption to the lives of resident and on tourists coming into or through

⁸ In the region of £9 000 pa to the local economy per holiday home (calculation by the Holiday Park and Homes Association with Visit Wales 2011).

⁹ Economic impact of Walking and Hill Walking in Wales WERU Cardiff University 2011
See also Ramblers Cymru policy on Renewable Energy Development (2013) which is unequivocal on the adverse impacts.

MCoS survey (2014) showed that well over a third of long distance walkers would, or were already, avoiding areas with windfarms.

¹⁰ Windturbine Experiences British horse Society 2012 undertook an extensive survey with nearly 1 000 riders.

the area. Once deterred by delays and construction noise visitors will simply go elsewhere.

4.9 Regeneris cite the very small post construction study at Bryn Titli / Llandinam (1996) as demonstrating that tourists are not deterred by windfarms. However, all the interviewees were in the study area so can hardly represent those who have been deterred and would not be visiting. Even given this limitation, 29.3% had a negative attitude to the impact of windfarms on their experience. Again this was when turbines were relatively small and proliferation and cumulative impact on landscape not expected.

5. Summary. Even within these limitations the Regeneris report recognises the potential impact on the tourism economy of the area affected by the North Powys proposals.

5.1 Predictions of impact on tourism cannot be accurately made from studies undertaken elsewhere which do not have the same tourism characteristics or a proliferation of turbines. This was a major flaw in the arguments put forward by Prof Aitchison in her industry sponsored research into potential effects of turbines on tourism. She was also criticised by academic colleagues for the lack of peer review, small size of her samples and interviews with visitors who had not come to a region to enjoy the countryside or landscape but were on beach holidays or visiting cities.

5.2 Regeneris are clear in their assessment that because of the nature of tourism and the tourist attraction in the North Powys area there is far greater sensitivity to windfarm development and vulnerability to reaching a 'tipping point' than other parts of Wales (summarised pp 120 - 130). The major transmission infrastructure and lengthy construction period are acknowledged as additional risk factors.

5.3 Given the adverse impact Regeneris consider 'mitigation'¹¹ must be implemented through planning. They do not tackle whether any mitigation is indeed possible against say, construction noise or the impact of dominating and incongruously moving man made structures in a natural environment leaving this obliquely to the '*planning process*.'

¹¹ See Windfarms in Rural Areas: how far do community benefits from windfarms represent a local economic development opportunity? Munday et al Cardiff University 2011. This study showed that there was no economic advantage to communities in rural Wales and that overall there was likely to be a small but significant disadvantage in lost tourism activity.