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The North Wales Wind Farms Connection Project

Environmental Statement Chapter 11 - Socio-Economic and Tourism

Application reference: EN020014

March 2015



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Environmental Statement

Chapter 11 Socio Economics and Tourism

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Environmental Statement Documents

Volume 6: Environmental Statement		
Document Reference	Chapter	Document
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6.2	2	Description of the Proposed Development
6.3	3	Alternatives and Design Evolution
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This Chapter includes the following Appendices:

DCO Document Reference	Appendix	Document
6.23	11.1	Socio Economics and Tourism – Background Data

Reference is also made to the following documents:

DCO Document Reference	Document
6.30	Scoping Opinion; Proposed North Wales Wind Farm Connections The Planning Inspectorate, February 2014
7.1	Design and Construction Report; February 2015

11 SOCIO ECONOMICS AND TOURISM

11.1 Introduction

- 11.1.1 This chapter assesses the likely significant environmental effects of the Proposed Development on socio-economics and tourism. In particular, it considers the potential adverse effects upon the local tourism economy, business interests and tourism interests, and the potential beneficial effects on the local economy in terms of income and job creation and increased custom for local businesses.
- 11.1.2 This chapter describes the methods used to assess the environmental effects, the baseline conditions which currently exist, any embedded mitigation that has been incorporated into the Proposed Development, the potential direct and indirect effects of the development arising from socio-economics and tourism effects, the mitigation measures required to prevent, reduce, or offset the effects and the residual effects.

11.2 Legislation and Guidance

National Policy Statements

- 11.2.1 The primary policy in respect of Nationally Significant Infrastructure Projects (NSIPs) is contained in the relevant National Policy Statements (NPS). The NPS for Overarching Energy (NPS EN-1) notes that the UK is decarbonising its power sector by adopting low carbon sources while maintaining a diverse range of energy sources to avoid overdependence on any one technology (fuel or technology type). It states that the:
- “Government would like industry to bring forward many new low carbon developments (renewables, nuclear and fossil fuel generation with CCS¹) within the next 10 to 15 years to meet the twin challenge of energy security and climate change as we move towards 2050”. (Para 3.3.5)*
- 11.2.2 NPS EN-1 acknowledges that *“the construction, operation and decommissioning of energy infrastructure may have socio-economic impacts at local and regional levels”*. (Para 5.12.1)

¹ Carbon Capture Storage (CCS)

11.2.3 Compliance with EN-1 is shown in Table 11.1 below:

Table 11.1: Compliance with EN-1

Compliance with NPS (EN-1) Requirements	
NPS EN-1 Section	Covered in ES
<p>Para 4.2.2: To consider the potential effects, including benefits, of a proposal for a project, the Planning Inspectorate (PINS) will find it helpful if the applicant sets out information on the likely significant social and economic effects of the development, and shows how any likely significant negative effects would be avoided or mitigated.</p> <p>This information could include matters such as employment, equality, community cohesion and well-being.</p>	<p>Socio-economic effects are fully assessed throughout this chapter.</p> <p>Employment creation is assessed in Section 11.7 Assessment of Effects of this chapter.</p>
<p>Para 5.12.2: Where the project is likely to have socio-economic impacts at local or regional levels, the applicant should undertake and include in their application an assessment of these impacts as part of the ES.</p>	<p>This chapter provides an analysis of the socio-economic labour market in local authority areas of Denbighshire and Conwy in Section 11.5 - Baseline. Section 11.7 Assessment of Effects looks at what extent the local area workforce will be able to be utilised.</p>
<p>Para 5.12.3: This assessment should consider all relevant socio-economic impacts, which may include:</p> <ul style="list-style-type: none"> • (a) the creation of jobs and training opportunities • (b) Provision of additional local services and improvements to local infrastructure • (c) Effects on tourism • (d) Impact of a changing influx of workers during the different construction, operation and decommissioning phases 	<ul style="list-style-type: none"> (a) This has been addressed within Section 11.7 Assessment of Effects. (b) No new local services are being provided. No significant socio-economic effects are predicted. (c) This has been addressed in Section 11.6 - Business Survey and 11.7 - Assessment of Effects. (d) This has been addressed within Section 11.7 - Assessment of Effects.

Compliance with NPS (EN-1) Requirements	
NPS EN-1 Section	Covered in ES
<ul style="list-style-type: none"> (e) Consideration of cumulative effects 	(e) This has been addressed under Section 11.11 Assessment of Cumulative Effects.
<p>Para 5.12.4: Applicants should describe the existing socio-economic conditions in the areas surrounding the proposed development and should also refer to how the development's socio-economic impacts correlate with local planning policies.</p>	<p>This paragraph has been addressed in Section 11.5 - Baseline of this chapter.</p> <p>An explanation as to how the Proposed Development's socio-economic impacts correlate with local planning policy is provided in Section 11.3 - Legislation and Guidance.</p>
<p>Para 5.12.5: Socio-economic impacts may be linked to other impacts, for example the visual impact of a development is considered in Section 5.9 but may also have an impact on tourism and local businesses.</p>	<p>The tourism impact analysis of this chapter is cross-referenced against the impact section of Chapter 7 of the ES, 'Landscape and Visual', to ensure consistency.</p>
<p>Para 5.12.7: The Planning Inspectorate (PINS) may conclude that limited weight is to be given to assertions of socio-economic impacts that are not supported by evidence.</p>	<p>The socio-economics and tourism impact analysis of this chapter is supported by applying best practise principles and a review of relevant comparative research. It is supported by detailed evidence and professional judgment, as outlined in Section 11.6 – Business Survey.</p>
<p>Para 5.12.8: The Planning Inspectorate (PINS) should consider any relevant positive provisions the developer has made or is proposing to make to mitigate impacts.</p>	<p>This has been addressed in Section 11.7 Embedded Mitigation.</p>

Economic Development and Strategy Review

- 11.2.4 The following section provides a brief review of the relevant socio-economic planning policies and strategy context for the Proposed Development.

Planning Policy Wales (July 2014)

Planning Policy Wales (PPW)² notes the importance of sustainable development and the vision for Wales to become economically, socially and environmentally sustainable. The visions which are of relevance to this socio-economic assessment include:

“A sustainable economy: A resilient and sustainable economy for Wales that is able to develop whilst reducing its use of natural resources and reducing its contribution to climate change.” (Para 4.1.5)

“A sustainable society: Safe, sustainable, attractive communities in which people live and work, have access to services, and enjoy good health and can play their full roles as citizens.” (Para 4.1.5)

- 11.2.5 Chapter 7 of PPW refers to economic development and defines it as “*development of land and buildings for activities that generate wealth, jobs and incomes*”. (Para 7.1.1). The construction and energy sectors are considered by the Welsh government to be important to the economy (Para 7.1.1).

- 11.2.6 Chapter 12 details the provision of infrastructure and services. Paragraph 12.1.1 emphasises the importance of infrastructure projects to Wales, including electricity generation:

“Adequate and efficient infrastructure, including services such as education and health facilities along with water supply, sewers, waste management, electricity and gas (the utilities) and telecommunications, is crucial for the economic, social and environmental sustainability of all parts of Wales. It underpins economic competitiveness and opportunities for households and businesses to achieve more socially and environmentally desirable ways of living and working”.

- 11.2.7 Paragraph 12.8.6 states, “*The Welsh Government’s aim is to secure an appropriate mix of energy provision for Wales, whilst avoiding, and where possible minimising environmental, social and economic impacts. This will be achieved through action on energy efficiency and strengthening renewable energy production.*”

Energy Wales: A Low Carbon Transition (2012)

- 11.2.8 The strategy outlines plans for Wales to “*create a sustainable, low carbon economy*”. The plan stipulates the need to “*ensure that the infrastructure necessary for a diverse portfolio of renewable energy is strategically planned and delivered*”. The strategy document recognises that “*Investment in energy infrastructure creates jobs, and stimulates and enables wider economic development.*” (Page 13)

² Edition 7; July 2014

Denbighshire Local Development Plan (2013)

- 11.2.9 One of the main themes of the LDP is to promote a sustainable economy. The LDP states that one of the ways this can be done is through improving the skills base of the County.

Conwy Local Development Plan (2013)

- 11.2.10 One of the main objectives of the LDP's Economic Strategy Statement is to meet "the employment needs of the predicted population" (Para 4.3.2.1). The construction of the Proposed Development will create employment opportunities, either directly, indirectly or induced, within the local economy.

Tourism Policy and Strategy Review

The following section provides a brief review of the relevant tourism planning policies and the strategy context for the Proposed Development. *Planning Policy Wales (July 2014)*

Chapter 11 refers to Tourism and states it is "vital to economic prosperity and job creation in many parts of Wales" (Para 11.1.1). This chapter predominantly focuses on tourism-related development.

The Welsh Government Strategy for Tourism 2013 – 2020 Partnership for Growth

This document sets out a strategy for tourism to drive sustainable growth in the sector up to 2020. The goal is for "Tourism to grow in a sustainable way and to make an increasing contribution to the economic, social and environmental well-being of Wales" (Page 8). The strategy has targets to create a longer tourism season to "provide important economic benefits to Wales by generating additional spend and income and increasing the number of full time job opportunities".

Tourism Strategy North Wales 2010-2015

- 11.2.11 This strategy notes that "Tourism is vitally important to the North Wales economy" (Page 2). This document sets out a strategy for the future of tourism in North Wales recognising scope to improve the tourism offer in the area.

- 11.2.12 The strategy considers tourism to be important because it:

- *"Attracts additional income;*
- *Generates jobs and supports businesses;*
- *Diversifies the economy, a sustainable sector; and*
- *Makes the region a better place."* (Para 1.2).

Denbighshire County Council Corporate Plan 2012-2017

- 11.2.13 This document sets out the Council's priorities for 2012-2017. The Council plan to grow tourism by encouraging more overnight stays and higher spend in the area. The Council aim to increase revenue from tourism in Denbighshire.

Conwy County Borough Council Corporate Plan 2012-2017

- 11.2.14 This document sets out the Council's priorities for 2012-2017. Supporting tourism is highlighted as a priority for Conwy. The development of "Destination Conwy" ensures that tourism in the area is promoted.

Guidance and Methodology

- 11.2.15 There is no dedicated UK legislation that specifies the detailed content required for socio-economic assessments. The methodology used for the socio-economic assessment element follows UK Government guidelines and best practice standards. The methodology used to estimate impacts follows guidance set out in the HM Treasury's Green Book³ and Homes and Communities Agency Additionality Guide 2014⁴, as well as taking into account the Department for Business Innovation and Skills research on additionality⁵.
- 11.2.16 When establishing the potential significant environmental effects on tourism within an area, there are no specific guidelines or requirements for such an assessment either set out by legislation or in any other statutory or advisory guidance on the preparation of Environmental Impact Assessments. However, the methodology used in the assessment is generally accepted as industry good practice, and has been employed in a number of other development projects throughout the UK, including energy generation, transmission, and distribution projects.

11.3 Consultation

Secretary of State Scoping Opinion

- 11.3.1 The table below identifies the issues raised by the Secretary of State (SoS) in the Scoping Opinion (DCO Document Ref 6.30) and indicates how they have been addressed through this assessment.

Table 11.2: Issues Raised and Responses to the SoS Scoping Opinion

Issues Raised and Responses to the SoS Scoping Opinion	
Issue Raised by SoS	Response
Consideration should be given to whether the baseline for this topic assessment should also include farming interests in the area, bearing in mind that agricultural land may be affected, particularly during the construction and decommissioning phases.	Chapter 10 'Land use and Agriculture (DCO Document 6.10) considers farming interests in the area.

³ http://www.hm-treasury.gov.uk/d/green_book_complete.pdf

⁴ https://www.homesandcommunities.co.uk/sites/default/files/aboutus/additionality_guide_2014_full.pdf

⁵ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191512/Research_to_improve_the_assessment_of_additionality.pdf Please note: 2014 HCA Additionality Guidance superseded 2008 English Partnerships Additionality Guidance

Issues Raised and Responses to the SoS Scoping Opinion	
Issue Raised by SoS	Response
The SoS recommends that the types of jobs generated by the proposed development should be considered in the context of the available workforce in the area. This applies equally to the construction and operational stages.	The socio-economic baseline includes an assessment of available construction labour in the Study Area
This section makes reference to potential mitigation measures but not to residual effects following mitigation. Any residual effects identified by the assessment should be detailed in the ES.	Residual effects following mitigation are detailed at Section 11.9 of this chapter.
This topic chapter of the ES should cross-refer to other chapters such as Land Use, Landscape and Visual, and Flood Risk as appropriate.	The assessment in this chapter has been cross referenced with Chapter 7 'Landscape and Visual' (DCO Document Ref 6.7) and Chapter 10 'Land Use and Agriculture' (DCO Document Ref 6.10). Chapter 9 'Flood Risk and Water Quality' is not appropriate for this assessment.

Socio-economic Consultation

- 11.3.2 A consultation process with key consultees and local stakeholders has informed the Environmental Impact Assessment (EIA). A list of consultees is provided in Table 11.3 below. This consultation was in addition to the scoping consultations reported in Chapter 4: 'EIA Methodology' (DCO Document Ref 6.4).
- 11.3.3 The socio-economic and tourism consultation process identified key consultees and local stakeholders from various sources⁶ to provide data and offer their views on key socio-economic and tourism issues affecting the area. A letter and method statement⁷ was then sent to consultees, informing them of the background, purpose, remit and scope of the assessment, eliciting their views on relevant key issues in the area and the methodology adopted, and obtaining any useful data from them.

⁶ Sources included: Local Authority websites, relevant tourism related data bases and websites and a review consultee lists for tourism related studies in Wales

⁷ Provided in Appendix 11.1 (DCO Document Ref 6.23)

Table 11.3 Consultees Responses

Consultee	Response	Action
Cadwyn Clwyd Rural Development Agency	No response	No action required
Conwy County Borough Council	No response	No action required
Denbighshire County Council (recreation)	No response	No action required
Denbighshire County Council (tourism)	No response	No action required
Denbighshire County Council (economics)	<p><u>Baseline assessment:</u> A range of data sources should be used in order to inform the assessment.</p> <p><u>Survey Work and Comparative Research Review:</u> consult with the Council's Economic and Business development team ahead of undertaking the business survey proposed include AONB businesses within the list of businesses.</p> <p><u>Consultations:</u> Consultations should be undertaken with Economic development Officers including Business Support Officers(DCC):</p> <ul style="list-style-type: none"> • Recreation Countryside Officers (DCC) • Tourism leads or officers (DCC) • Biodiversity / Conservation leads 	<p>A range of sources were used including: Census data, BRES data (Business Register and Employment Survey) ABI data (Annual business Inquiry) Visit Wales, GB Tourism Survey, International Passenger Survey and online search directories such as Yell.com.</p> <p>The Economic and Business Development team was consulted regarding the timing of the survey. The business survey started once the Council's survey had finished.</p> <p>Some businesses in the AONB were included in the business survey population. Settlements to the north, middle and south of the AONB were added to the business survey sample. This included settlements on the eastern edge of the AONB such as Dyserth, Rhuddlan and Corwen. Ruthin was also included, although located out with the AONB boundary it has been included in the business survey because visitors</p>

Consultee	Response	Action
	<p>or officers (DCC)</p> <ul style="list-style-type: none"> • Agri / Estates Officers (DCC) <p>In addition we would suggest the following organisation is a key consultee.</p> <ul style="list-style-type: none"> • Cadwyn Clwyd Rural Development Agency 	<p>staying there are likely to visit the AONB.</p> <p>Consultation documents were sent to the recreation and tourism teams at the Council In addition it was sent to Cadwyn Clwyd Rural Development Agency.</p> <p>The request to consult with the Biodiversity / conservation leads and Agri/Estates officers falls out with the scope of this assessment.</p> <p>Please see Chapter 6: Biodiversity and Geological Conservation</p>
Natural Resources Wales	<p>Planning Policy Wales (PPW) states (in Section 4.2.2) that the 'decision-taker' has the role of ensuring social, economic and environmental issues are balanced with a presumption in favour of sustainable development. For this development the decision taker will be the Planning Inspectorate and we therefore suggest that they would be the most appropriate body to assess your proposed methods statement.</p> <p>However do please contact us again if you wish to discuss this matter further.</p>	<p>The Planning Inspectorate does not assess any method statement prior to the submission of the Development Consent Order (DCO) but they will in due course provide a view on the assessment as a whole. No action required.</p>

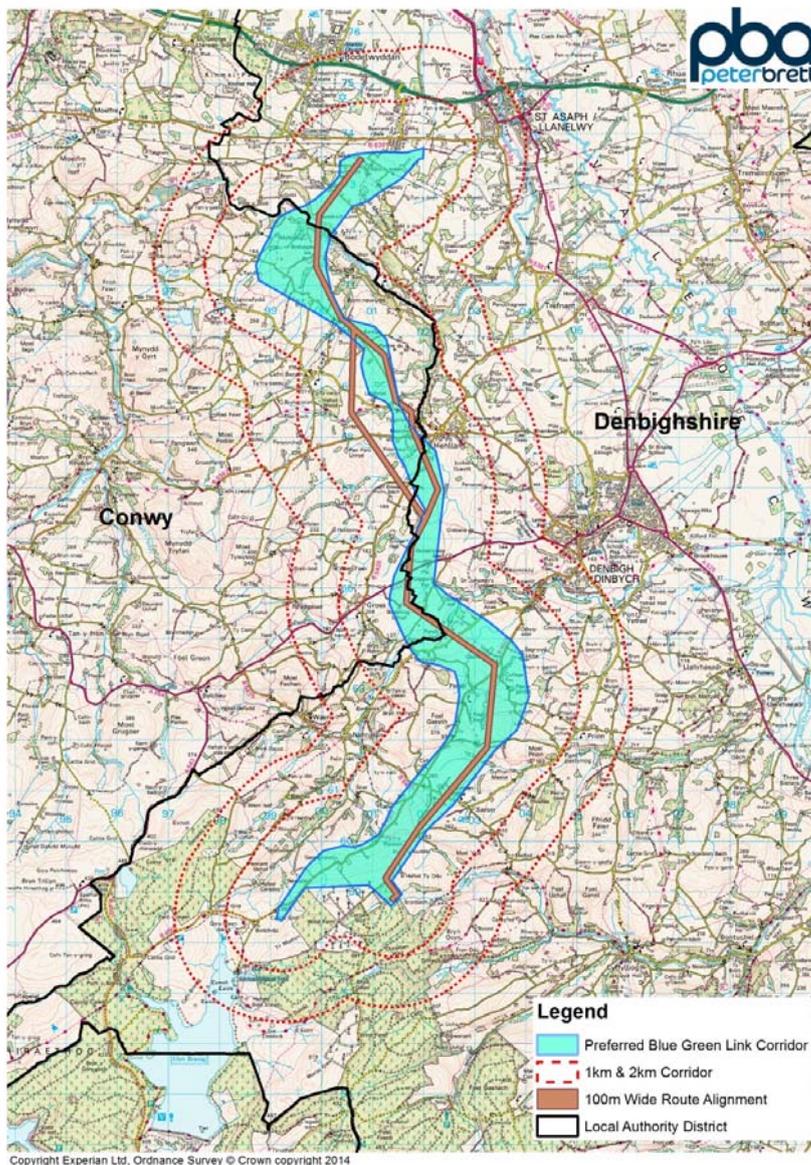
Consultee	Response	Action
North Wales Tourism Partnership (NWTP)	<p>The Welsh Government will cease funding to Tourism Partnership North Wales on the 30 September 2014 and the company will be wound up.</p> <p>Therefore it would be inappropriate for us to comment on your assessment.</p>	No action required
Visit Wales	No response	No action required
Wales Activity Tourism Organisation (WATO)	<p>WATO welcomes such an assessment to measure the potential effects to socio-economic & tourism. The proposed work passes through significant tourism destinations which may as a result have a significant impact on tourism in the region. Whilst this does highlight some concerns for WATO & our members, your early engagement with the outdoor sector is viewed positively.</p> <p>I welcome being kept informed of any assessments & further developments.</p>	No action required
Welsh Tourism Alliance	<p>We are a Wales National Organisation and do not engage in regional issues, this is the remit of our member organisations who are better placed to respond.</p> <p>I suggest, if you haven't done already, that you direct this to North Wales Tourism and the other North Wales base Tourism or trade associations.</p>	<p>North Wales Tourism Partnership were contacted but were unable to comment on our assessment methodology (see above)</p> <p>No other North Wales tourism associations were identified by our search</p>

11.4 Methodology

Study Areas

- 11.4.1 The Study Area for the socio-economic assessment is based upon the local authority areas, Denbighshire and Conwy. This is the area where most of the socio-economic effects are likely to be experienced. Figure 11.1 overleaf shows the Proposed Development runs along the boundary of each local authority.
- 11.4.2 The Study Area for the tourism assessment has been defined as being a 4km wide corridor chosen to reflect the 4km statutory consultation corridor.
- 11.4.3 Visitor facilities or notable points of focus of visitor attractions within this area have been reviewed. Notable tourism facilities located just outside the boundary of the Study Area have also been included.

Figure 11.1: Study Area – Tourism Assessment Study Area



Assessment Methodology

11.4.4 The assessment methodology employs a combination of web and desk-based surveys, and information assessment and analysis. The overall methodology and scope of works for these assessments have been tested and agreed through the process of scoping and consultation. It has been undertaken on the following basis and through the following stages:

- Consultation process;
- Baseline assessment; and
- Impact Assessment.

Baseline Assessment

11.4.5 The baseline assessment comprises the socio-economic baseline and a baseline assessment of tourism facilities and receptors within the local area.

Socio-Economics

11.4.6 The socio-economic baseline⁸ provides details of key issues, trends and the performance of the Study Area,⁹ relative to north Wales, Wales and Great Britain (GB).

11.4.7 It also includes a review of relevant economic and planning policy in the Study Area. It also provides other policy and strategy setting out the context for socio-economic activity within the local and wider area. Effects on businesses are accounted for in the Tourism section.

Tourism

11.4.8 The baseline assessment of tourism¹⁰ has been undertaken in terms of:

- Visitor and tourist trends;
- Tourism volume and value;
- Visitor patterns;
- Visitor accommodation occupancy rates;
- Expenditure patterns; and
- Tourism employment.

11.4.9 A review of relevant tourism policy and legislation strategy in the Study Area setting out the context for tourism activity within the local and wider area is also provided.

⁸ Compiled using various sources including: Experian 2014 data, Census 2011 data, Business Register and Employment Survey (BRES) 2012, Annual Business Inquiry (ABI) data 2003-2008

⁹ Population, unemployment, economic activity, sectors of employment, skills, education, availability of relevant workforce (Experian 2104 using Census 2011 data)

¹⁰ Compiled using various sources including: Wales Accommodation Occupancy Surveys, May 2014, GB Tourism Survey, International Passenger Survey ONS data Visit to Tourist Attractions in Wales 2013 Revisited

11.4.10 These baselines set the context for the remainder of the appraisal, and against which any impact can be assessed.

Tourism Audit

11.4.11 The tourism activities, patterns, trends, and facilities at a Denbighshire and Conwy area level are subject to a baseline audit. The audit covers the aspects, which make up the tourism product in the area, act as a focus or attraction for visitors, and lead to expenditure by tourists and visitors. Visitor attractions and tourism related businesses were identified through a search of online directories such as Yell.com.

Business Survey

11.4.12 A tourism business survey (Section 11.6) has been undertaken to provide a specific quantification of potential impact within the local economy on tourism-related businesses potentially affected by the Proposed Development. Businesses included in the survey are accommodation providers and tourist attractions.

11.4.13 The questions asked of the businesses covered the following areas:

- Business type and current turnover;
- Trends in turnover and profitability;
- Views of current business prospects;
- Main client or customer base – local, passing, or tourist; and
- Proportion of turnover by customer sector.

11.4.14 The questions posed were as follows:

- Perceived scale of impact of the Proposed Development on trade (turnover change, employment change, business opportunities / prospects); and
- Reasons for change in trade levels and expectations, prior to the Proposed Development being built.

11.4.15 This study provides an informed view of the business community across the Study Area and can be used as a proxy for tourists, visitors, and users of the facilities and other visitor resources within the Study Area across the whole season.

Impact Assessment

Definition of Socio-Economic impact

- 11.4.16 As stated above the Study Areas for the socio-economic assessment are based upon the Denbighshire and Conwy local authority areas.
- 11.4.17 The principal socio-economic assessment criteria relate to the employment effects within the Study Area. These effects are defined using standard economic appraisal terms¹¹ such as Full-Time Equivalent (FTE) jobs¹² and the Gross Value Added (GVA)¹³ generated by those jobs. The assessment has therefore focussed on the following major economic effect categories:
- **Direct economic effects:** jobs and GVA that are wholly or largely related to construction and maintenance of the Proposed Development;
 - **Indirect economic effects (positive and negative):** jobs and GVA generated in the economy of the Study Area in the chain of suppliers of goods and services to the direct activities of the Proposed Development;
 - **Induced economic effects:** jobs and GVA created by direct and indirect employees' spending in the Study Area or in the wider economy; and
 - **Wider economic (catalytic) effects (positive and negative):** employment and income generated in the economy related to the wider role of the Proposed Development in influencing economic activities (including wider socio-economic effects below). This will include the effects on inward investment, elsewhere within the construction sector (e.g. as a result of worker supply), and on other sectors of the economy.
- 11.4.18 Potential likely significant environmental effects from the construction and maintenance of the Proposed Development are identified and their significance assessed with regard to the sensitivity of receptors and the magnitude of the effect.

Comparator Studies

- 11.4.19 Comparative research studies¹⁴ have been assessed (para 11.7.22). This comparative evidence is useful for determining the tourism impact of the Proposed Development using evidence of the tourism effects experienced from overhead line developments elsewhere in the UK.
- 11.4.20 The perceived impacts obtained from the Business Survey are viewed alongside the findings of the comparator research studies to provide a balanced assessment.

¹¹ Referenced in HM Treasury Green Book

¹² Full-time equivalent of 1.0 (FTE) is equivalent to a full time workers while a 0.5 FTE is a part time worker.

¹³ Gross value added (GVA) is a measure in economics of the value of goods and services produced in an area, industry or sector of an economy.

¹⁴ Second Yorkshire Line Ex Post Tourism Assessment (Roger Tym & Partners 2011) and Scotland/Northern Ireland Interconnector Post Tourism Impact Assessment (Roger Tym & Partners 2006)

Socio-Economic Sensitivity

- 11.4.21 There is no specific Guidance for assessing socio-economic or tourism sensitivity or magnitude. The approach outlined below has been developed by PBA and tested at Public Inquiry for a number of Nationally Significant Infrastructure projects.
- 11.4.22 For economic effects (including employment), the availability of labour and skills is critical in accommodating the demands, needs and requirements of the Proposed Development. Adequate capacity results in a low sensitivity, while limited capacity results in a high sensitivity. The socio-economic receptor is the labour market. Sensitivity criteria are shown below (Table 11.4).

Table 11.4 Socio-economic Receptor Sensitivity

Sensitivity of Receptor (Labour Market)	Definition
High	<p>The receptor has low or limited availability of labour and skills in the area's workforce (this is dependent on specific project requirements and the degree to which they can be met the Study Area.</p> <p>The Proposed Development <u>would</u> lead to labour market pressure and distortions (i.e. wage inflation, skills and capacity shortages, importation of labour).</p>
Medium	<p>The receptor has a constrained supply of labour and skills.</p> <p>The Proposed Development <u>may</u> lead to labour market pressure and distortions (i.e. wage inflation, skills and capacity shortages, importation of labour).</p>
Low	<p>The receptor has a readily available labour force: some skill deficits.</p> <p>The Proposed Development is <u>unlikely</u> to lead to labour market pressure and distortions (i.e. wage inflation, skills and capacity shortages, importation of labour).</p>

Socio-Economic Magnitude of Effect

- 11.4.23 The magnitude of potential effects on socio-economic receptors will be assessed as defined in Table 11.5 below.¹⁵

¹⁵ Note: Effects on businesses are accounted for in the Tourism section

Table 11.5 Socio-Economic Magnitude of Effect

Magnitude	Definition
Major	Effects would be observed on an international, national or regional scale; and/or where the number of jobs created or lost in the Study Area would be greater than 250 (based upon EU definition of small , medium and large enterprises ¹⁶). and/or Effects would be of long-term duration (i.e. greater than 5 years).
Moderate	Noticeable effects would arise that may be judged to be important at a local scale, either because there are large effects on few receptors or smaller effects on a larger proportion of receptors; and/or where the number of jobs created or lost in the Study Area would be greater than 50, but fewer than 250. and/or Effects would be medium-term (i.e. three-five years).
Minor	Small scale effects would arise, with a limited number of affected receptors; and/or where the number of jobs created or lost in the Study Area would be greater than 10, but fewer than 50. and/or Effects would be short-term (i.e. one-two years).
Negligible	Where an effect would not be discernible; and/or where fewer than 10 jobs would be created or lost within the Study Area. and/or Effects would be temporary (i.e. experienced for less than one year).

Definition of Tourism Impact

11.4.24 For impact assessment purposes the Study Area has been defined as a 4km wide corridor as effects are likely to be restricted to areas of visibility within 4km of the route.¹⁷ The catchment area is taken to include all settlements within this area. Also included are receptors, notable points of focus, or visitor attractions located in this catchment. Significant tourism or recreation receptors located just outside the boundary¹⁸ of the Study Area have also been included.

¹⁶ http://ec.europa.eu/enterprise/policies/sme/files/sme_definition/sme_user_guide_en.pdf

¹⁷ This is confirmed by the Proposed Development's ZTV

¹⁸ This did not employ a specific 'cut off' distance. Settlements and receptors on the edge of the boundary (i.e. Denbigh) were included in their entirety.

- 11.4.25 Tourism and recreational behaviour will only be detrimentally affected where the effect of a development either changes the visitor / user pattern – in terms of numbers, and / or where patterns of expenditure may change. In this regard, opportunities for tourist and visitor expenditure and any potential variation in expenditure or visitor numbers and its consequent effect upon turnover or employment, are of key importance. The Environmental Impact Assessment (EIA) highlights such effects and their likelihood of occurrence in this chapter.
- 11.4.26 Facilities or notable points of focus in the Study Area have been identified. Based upon the Proposed Development’s anticipated visibility, an assessment is provided on the likelihood of the Proposed Development influencing visitor and tourist attitudes and behaviour towards these visitor facilities and locations. The LVIA Chapter and Proposed Development’s ZTV is a therefore a crucial component in this chapters tourism assessment. The ZTV is overlaid with tourism receptors to assess the potential magnitude of effect.
- 11.4.27 The scale of potential effects on tourist recreational users is likely to be a factor in relation to:
- The proximity of the Proposed Development;
 - Significance of the resource in relation to the amount it is used;
 - The type of resource e.g. a town centre indoor recreational facility, compared to a hill top view point;
 - The visibility of the Proposed Development from the resource at all points; and
 - Diversion due to the presence of the Proposed Development.
- 11.4.28 The likely significant environmental effect of both tourism and recreation effects will be determined through an understanding of the sensitivity of a receptor and the anticipated magnitude of effect.
- Tourism Sensitivity¹⁹
- 11.4.29 In determining the level of tourism and recreation sensitivity, the status of the receptor or resource is the defining factor. The main factors considered relevant when defining the sensitivity of receptors are outlined in Table 11.6 below.

¹⁹ There is no specific Guidance for assessing socio-economic or tourism sensitivity or magnitude. The approach outlined below has been developed by PBA and tested at Public Inquiry for a number of Nationally Significant Infrastructure projects

Table 11.6 Tourism Receptor Sensitivity

Sensitivity of Receptor	Definition
High	Where the receptor or resource (visitors to activities, resources, attractions or businesses) is defined as being of International or National status and generates high ²⁰ visitor numbers
Medium	Where the receptor or resource is defined as being of regional status and generates medium visitors numbers
Low	Where the receptor or resource is defined as being of local status and generates low visitor numbers

Tourism Magnitude of Effect

- 11.4.30 Magnitude of effect will be gauged by estimating the amount of change on the receptor arising from the construction, operation and decommissioning Proposed Development. This level of effect is based upon the response to the tourism business survey as fully described in paragraph 11.7.12. The magnitude of change will be evaluated in line with the criteria set out below (Table 11.7).

Table 11.7 Tourism Magnitude of Effect

Magnitude	Description
Major	Business Survey Impact = greater than 15% reduction or increase on business turnover (see para 11.6.8). ²¹ Where the extent of effects on receptors (activities, resources, or businesses) is large scale and a large number of people or activities will be affected; or where there is an obvious view of the Proposed Development
Moderate	Business Survey Impact = between 10 and 15% reduction or increase on business turnover. Where the extent of effects on receptors (activities, resources, or businesses) is small in scale, but a large number of people or activities will be affected; or alternatively this will be where the extent of effects on activities, resources and/or businesses is large in scale but only a small number of people or activities will be affected.

²⁰ There is no precise number that determines high, medium or low visitor numbers. Precise visitor data is also typically limited to national status attractions. Professional judgment is used on a project by project basis.

²¹ Assessment thresholds are based on our wide market experience where in tourism related business surveys, respondents have generally stated that >15% reductions in turnover are critical to business sustainability / survival, c10-15% represents a moderate impact which can be recouped through marketing, costs saving and similar market responses, and <10% is subsumed within general changes in trading conditions

Magnitude	Description
Minor	<p>Business Survey Impact = less than 10% reduction or increase on business turnover.</p> <p>Where the extent of effects on receptors is small in scale and will only affect a small number of people or activities; or where the Proposed Development would be unlikely to be visible (as it would be obscured by hills or woodland, etc.) or would be at a distance, therefore the magnitude of effect would be minor.</p>
Negligible	<p>Where effects on receptors would be negligible</p> <p>Imperceptible loss or benefit</p>
<p><i>The findings of comparative research studies (see 11.7.22) are also used to calibrate the assessment</i></p>	

Overall Significance of Impact

- 11.4.31 Socio-economic and tourism impacts are considered separately, using different sensitivity and magnitude criteria however both use the same significance matrix to establish the overall impact.
- 11.4.32 In line with standard EIA practice, the sensitivity of receptors, as defined in Table 11.4 Receptor Sensitivity (Socio-economic) and Table 11.6 Receptor Sensitivity (Tourism) are considered against the Magnitude of Effect (Table 11.5 and Table 11.7 respectively) to determine the significance of effect (see Table 11.8).
- 11.4.33 Significant impacts are those which are moderate or major according to Table 11.8

Table 11.8 Significance of Impact

		Sensitivity of Receptor		
		High	Medium	Low
Magnitude of the Effect	Major	Major significance	Major or moderate significance	Moderate significance
	Moderate	Major or moderate significance	Moderate significance	Minor significance
	Minor	Moderate significance	Minor significance	Minor significance
	Negligible	Not significant	Not significant	Not significant

Embedded Mitigation

- 11.4.34 The LVIA Chapter 7 Section 7.6 outlines embedded mitigation for the Proposed Development. This involves reinstating vegetation, trees, hedgerows, soils and other environmental resources which are removed or displaced during construction. Trees in particular would be replaced on a two-to-one basis. The Proposed Development's embedded mitigation will ensure visual impacts are minimised.
- 11.4.35 Our assessment approach has factored in the embedded mitigation and its likely effect in mitigating perceived impacts.

11.5 Baseline

Socio-Economics

- 11.5.1 This socio-economic profile examines the key indicators and measures of socio-economic activity in the Study Area. It sets a context for the assessment and highlights key socio-economic issues.

Socio-Economic Profile

- 11.5.2 This section summarises the key points in the socio-economic structure of Denbighshire and Conwy, in comparison with north Wales, Wales and GB.
- 11.5.3 Detailed socio-economic baseline tables are provided in Appendix 11.1 (DCO Document Ref 6.23).

Population

- 11.5.4 The population has increased in Denbighshire and Conwy between 2001 and 2012 and is projected to continue rising. Denbighshire's population is projected to increase at a higher rate than Conwy. Conwy's population is projected to rise at a similar rate to that of North Wales. Denbighshire's projected increase is comparable with both Wales and GB averages.

Age Structure

- 11.5.5 Denbighshire and Conwy both have declining proportions of working age people and an increasing dependency²² ratio. By 2021 over a quarter of both Denbighshire and Conwy's populations are expected to be of retirement age. This is higher than what is expected for North Wales, Wales and GB.

Economic Activity

- 11.5.6 The economic activity rate is a useful measure of the labour market opportunities available to the population.²³ Denbighshire and Conwy's economic activity rate is comparable to North Wales and Wales, but lower than the GB average.
- 11.5.7 Denbighshire and Conwy are characterised by relatively high levels of retired people in comparison to the Welsh and GB averages. The level of permanently sick/disabled people in Denbighshire and Conwy is also higher than the GB average. Levels of unemployment in Denbighshire and Conwy are the same as north Wales and GB, but lower than the Welsh average.

Employment Structure

- 11.5.8 Both Denbighshire and Conwy and have higher than average proportions of people working in human health and social work activities. 10% of people in Conwy work in the accommodation and food services industry which is higher than the national level of 6%. The proportion of people working in construction in Conwy and Denbighshire is comparable to North Wales and Wales but lower than the GB average.

Social Classification

- 11.5.9 NRS social grades are a system of demographic classification widely used in market research.²⁴ Denbighshire and Conwy have a higher proportion of people in the C2²⁵ social grade than that of the national and GB averages. This indicates that Denbighshire and Conwy have relatively high proportions of people in skilled manual jobs.

Qualifications

- 11.5.10 Around a quarter of people in Denbighshire (25%) and Conwy (26%) have no qualifications. This level is consistent with the Wales average (26%) and is higher than the GB average (23%). Denbighshire has a higher than average level of people with GCSE or equivalent qualifications. The level of people with a degree level qualification is broadly similar across Wales (29-30%), but is lower than the GB average (33%).

²² The dependency ratio (or proportion of working age people) is significant as it measures the relationship between the productive element and the economically dependent element of a population.

²³ The economic activity rate measures the percentage of the population, both in employment and unemployed that represent the labour supply regardless of their labour status. The figure represents the degree of success of the area in engaging people in productive activity.

²⁴ Originally developed by the National Readership Survey (NRS), and now used by many other organisations for wider applications, having become a standard for market research.

²⁵ Skilled manual workers

Wages

11.5.11 Average weekly pay in Denbighshire and Conwy is lower than the national average and the GB average. Average weekly pay for full time workers is higher in Conwy than it is in Denbighshire.

Summary

11.5.12 The Denbighshire and Conwy areas are characterised by:

- Increasing populations (2001-2012), consistent with wider area, region, county and national trends;
- Projected population increases in both areas. The rate of increase in Denbighshire is comparable to the GB average;
- A high and growing retirement age population as well as a declining working age population;
- Economic activity rates comparable to north Wales and Wales but lower than the GB region as a whole;
- Relatively low levels of unemployment compared to the Wales average;
- Average levels of people working in construction compared to the national averages;
- Lower than average proportion of people working in manufacturing;
- Higher than average human health and social work activities employment;
- A relatively high proportion of people employed in skilled manual labour;
- A lower than average proportion of people in the higher class social grades compared to GB figures;
- Below average education attainment levels compared to the GB averages; and
- Lower than average weekly wages.

Socio-Economic / Labour Market Sensitivity

11.5.13 The area surrounding the Proposed Development has a readily available supply of appropriate labour.²⁶

11.5.14 The overall socio-economic study area is assessed as being of low sensitivity.²⁷

²⁶ The study area has a relatively high proportion of skilled labour and average levels of construction labour.

²⁷ i.e. the development is unlikely to lead to labour market pressure and distortions (i.e. wage inflation, skills and capacity shortages, importation of labour).

Tourism

- 11.5.15 Detailed tourism baseline tables are provided in Appendix 11.1 (DCO Document Ref 6.23).

Tourism Volume and Value

- 11.5.16 This section provides a tourism profile of Wales, specifically Denbighshire and Conwy, in terms of visitor and tourist trends, tourism volume and value, visitor patterns, visitor accommodation occupancy rates and expenditure patterns. Where possible, figures for Denbighshire County Council and Conwy County Borough Council have been provided in preference to the wider North Wales area, as the Proposed Development is located within these areas.

Wales Key Visitor Attractions and Activities

- 11.5.17 The Welsh Government carries out an annual survey of patronage of popular visitor attractions in Wales including the top 10 unpaid and paid visitor attractions. The LC Swansea²⁸ and the Wales Millennium Centre are the most popular paid and unpaid attractions respectively. Of the top 10 tourist attractions half are located in North Wales including Caernarfon Castle, Conwy Castle, Great Orme Tramway, Bodnant Garden and Erddig. None of these attractions are located within close proximity (i.e. within 4km) of the Proposed Development.

North Wales

- 11.5.18 The North of Wales has a diverse tourism profile with a range of activities and visitor attractions. The region covers a varied landscape, including countryside, mountains, valleys and coast. Within the area is Snowdonia National Park (c. 20km away from the Study Area), which includes Snowdon, Wales's highest mountain.
- 11.5.19 There are a number of beaches in the north Wales area, as well as a number of key seaside resorts in the area including Llandudno (c.25km away from the Study Area), Colwyn Bay (c.18km away from Study Area), Rhyl (c. 8km away from Study Area) and Prestatyn (c11km away from the Study Area). As well as Snowdonia National Park there are three Areas of Outstanding Natural Beauty (AONB) – Llyn Peninsular (c.55km away from the Study Area), Anglesey (c. 50km away from the Study Area) and Clwydian Range (c.8km from the Study Area), five World Heritage Sites – Pontcysyllte Aqueduct and Canal (c.30km away from the Study Area), Caernarfon Castle (c.55km away from the Study Area), Beaumaris Castle (c. 40km away from the Study Area), Harlech Castle (c. 50km away from the Study Area) and Conwy Castle (c. 23km away from the Study Area) and twenty five national nature reserves including Hafod Elwy Moor (c. 8km away from the Study Area), Y Berwyn (c. 30 away from the Study Area) and Coed Dolgarrog (c. 25km away from the Study Area). It is important to note that none of the above are located within close proximity of the Proposed Development.

²⁸ The LC Swansea is Wales' biggest indoor Waterpark

Denbighshire County

- 11.5.20 Denbighshire is known for its two seaside resorts, Rhyl and Prestatyn, which are both notable for their beaches. As stated above neither Rhyl nor Prestatyn are located in or near to the Study Area. The countryside setting makes Denbighshire a popular destination for walking and other outdoor activities. Appendix 11.1 (DCO Document Ref 6.23), Table 2.4 shows three year averages for visits to Denbighshire that include one or more overnight stays.
- 11.5.21 GB based trips to Denbighshire have increased between 2009-11 and 2010-12 periods.
- 11.5.22 Since 2006 there has been a continued decline in overseas trips and spend to Denbighshire.
- 11.5.23 In 2012 4700 people were employed in tourism activities in Denbighshire which accounts for 12.4% of employment in the area. Denbighshire has the eighth highest proportion of employees in all tourism industries among the 22 Welsh local authorities.

Conwy County Borough

- 11.5.24 A significant element of Conwy's tourism product is focused around its coast. These areas are known for their beaches, castles and outdoor activities. Conwy County Borough includes popular seaside resorts such as Llandudno and Colwyn Bay. As stated above none of these popular tourist towns are located in or within close proximity to the Study Area.
- 11.5.25 Appendix 11.1 (DCO Document Ref 6.23), Table 2.2 shows three year averages for visits to Conwy that include one or more overnight stays. GB based trips²⁹ decreased dramatically between the 2008-10 and 2009-11 periods. Overseas visits and spend have generally decreased but increased between 2009-11 and 2010-12. The number of GB and Overseas trips was lower in 2010-12 than in 2006-08.
- 11.5.26 In 2012 8,200 were employed in tourism activities in Conwy, which accounts for nearly a fifth of people in the area. Conwy has the highest proportion of employees in all tourism industries among the 22 Welsh local authorities.

Accommodation Provision and Capacity

- 11.5.27 The tables below (Tables 11.9 and 11.10) show accommodation services ³⁰in both areas. The number of establishments accounts for a relatively small proportion of Wales as a whole. There is limited data on the occupancy of the accommodation in Welsh local authority areas. At present there is no occupancy data available for Denbighshire or Conwy.

²⁹ Defined as a domestic tourist trip from a location within GB to another location within GB.

³⁰ Includes serviced accommodation, self-catering, caravan/camping, other (including hostels)

Table 11.9 Accommodation Provision in Conwy and Denbighshire

	No of Establishments	Rank (/22)	% of Wales Total	No. of Bedspaces	Rank (/22)	% of Wales Total
Denbigh	382	9	3.2%	23,633	8	4.2%
Conwy	1,061	4	8.9%	83,193	3	14.9%

Source: Wales Occupancy Survey

- 11.5.28 Data on accommodation occupancy levels are available at a Wales level. Occupancy levels have increased between 2012 and 2014.

Table 11.10 Accommodation Occupancy Wales

	2012	2013	2014	% Change
Wales (past 12 Months)	59%	60%	63%	+3%

Source: Wales Accommodation Occupancy Surveys, May 2014 (provisional)

Profile of Tourism Business

- 11.5.29 In the Study Area there has been a 16% increase in tourism related businesses³¹ between 2003 and 2008.³² Appendix 11.1 (DCO Document Ref 6.23), Table 2.6 shows the concentration of tourism businesses per Super Output Area³³ within the Study Area. The majority of the Study Area has a small number of businesses (10 or less). In 2008, there were in total 70 tourism related businesses in the 4km Study Area. The majority of businesses in these areas were either bars or restaurants.
- 11.5.30 The northern area of the 4km Study Area has the highest concentration of tourism-related businesses (See Figure 1 in Appendix 11.1 (DCO Document Ref 6.23)). Nearby areas outside the Study Area such as Abergele and Towyn have much higher concentrations of tourism-related businesses. This implies the majority of the Study Area especially the central area is not a primary tourist destination in the north of Wales.

³¹ Tourism related businesses include: accommodation, pubs, restaurants and visitor attractions

³² Appendix 11.1 (DCO Document Ref 6.23) shows the number of tourism related businesses³² by category within the 4km wide study corridor area by category in 2003 and 2008.

³³ Super Output Areas (SOAs) are a national geography created by the Office for National Statistics (ONS) for collecting, aggregating and reporting statistics.

Summary

- None of the top ten paid or unpaid visitor attractions in Wales are located within or in close proximity to the Tourism Study Area;
- Recent trends show that overseas trips, nights and spend have increased in Conwy whereas Denbighshire has recorded decreases;
- Nearly a fifth of people in Conwy are employed in tourism activities whereas only 12% employed in tourism in Denbighshire;
- Average accommodation occupancy levels for Wales have risen since 2012;
- The 4km Study Area has approximately 70 tourism related businesses. The majority of these businesses are bars and restaurants; and
- Overall there is a fairly low tourism business density in the 4km Study Area. Other neighbouring areas, such as Abergele and Towyn, have higher tourism densities.

Tourism Audit

Identification of Principal Facilities

- 11.5.31 In assessing the tourist and visitor facilities within the Study Area, it is those which appear most frequently within tourist or visitor websites, brochures, guidebooks, and other media that are taken to represent the principal tourism resources in the area. This is a standard approach undertaken within environmental impact assessments as a proxy for tourists or other visitors assessing the potential attraction of an area.

Audit

- 11.5.32 This section identifies all the various forms of tourism and recreation activities and facilities within the Study Area. This includes settlements, tourist routes, visitor attractions, and accommodation providers present. Figures 2 and 3 in Appendix 11.1 (DCO Document Ref 6.23) show the principal settlements, tourist routes, footpaths and receptors within the study area and on the outskirts of the study area.

Principal Settlements

- St Asaph - the city, located in Denbighshire and is home to the smallest ancient cathedral in Britain. The city is located approximately 2km from the Proposed Development.
- Denbigh - a market town located in Denbighshire, located approximately 4km from the Proposed Development.
- Henllan - a village located approximately 2km north west of Denbigh is the settlement in closest proximity to the Proposed Development. (c. 1km).
- Bodelwyddan - a town located in Denbighshire approximately 2km from the Proposed Development at its closest point.

Principal Tourist Routes

- 11.5.33 The A55, also known as the “North Wales Expressway” is the main road through north Wales linking Chester to Holyhead.

The A543 goes from Pentrefoelas to Bodfari via Denbigh and is located c.1km from the nearest point of the Proposed Development.

Principal Footpaths

- 11.5.34 The Clwydian Way regional trail and the North Wales Pilgrim’s Way long distance footpath are both regionally valued and promoted.

Principal Tourist Receptors

- 11.5.35 There are two tourist attractions within the Study Area: Bodelwyddan Castle³⁴ and Park and St Asaph Cathedral³⁵. There are two other visitor attractions located in Denbigh, which is in close proximity to the Study Area: Denbigh Castle³⁶ and the Wireless in Wales Museum³⁷. Llyn Brenig Visitor Centre³⁸ is located some 4km south west of the study area.

11.6 Business Survey

Survey Objectives

- 11.6.1 This section provides details of the key findings of the survey of local tourism-related businesses undertaken by Peter Brett Associates during the months of September and October 2014 in order to identify the potential likely significant environmental effects of the Proposed Development.
- 11.6.2 The analysis presented within this section forms part of the baseline in order to provides a detailed understanding of the potential effects of the Proposed Development on the local tourism business community. It informs the socio-economics and tourism Environmental Impact Assessment (EIA).

Survey Methodology

- 11.6.3 The survey population consisted of tourism-related businesses³⁹, situated in and around the 4km wide Study Area, centred upon the Proposed Development (Figure 11.1). This takes in areas of the Clocaenog Forest and the settlement of St Asaph. In addition the town of Denbigh was included due to its notable concentration of tourism businesses and close proximity to the 4km Study Area. These businesses were predominantly identified through a desktop review of available sources, such as internet searches and a review of tourist brochures and guidebooks.

³⁴ 56,800 visitors in 2013 (Visit Wales, Visits to Tourist Attraction)

³⁵ No Visitor number available

³⁶ 13,400 visitors in 2013 (Visit Wales, Visits to Tourist Attraction)

³⁷ Visitor numbers unknown

³⁸ 175,000 visitors in 2013 (Visit Wales, Visits to Tourist Attraction)

³⁹ A tourism-related business is defined as a business which could be considered to derive part or all of its trade from tourism (PBA definition)

- 11.6.4 Denbighshire County Council requested that businesses within the Clwydian Range and Dee Valley Area of Outstanding Natural Beauty (AONB) should also be consulted. The AONB is situated approximately 6km to the east of the overhead line at its nearest point. Further settlements were added to the business survey sample in order to address the Council's comments. This included for example Dyserth, Rhuddlan and Corwen to the east. Ruthin was also included, as although located out with the AONB boundary visitors staying there are likely to visit the AONB. Each business was interviewed by telephone to discuss the possible impact of the Proposed Development, with a minimum of three attempts to contact each business to maximise response rates. If it was inconvenient, another time was arranged or contact was made by e-mail. Each response was then entered onto a database on the SurveyMonkey website. This allowed responses to be gathered and analysed efficiently. A number of respondents decided to complete the survey online using a link to the website. Some felt they did not have time to provide a full response, so responded to key questions on impact only. A copy of the questionnaire can be found in Appendix 11.1 (DCO Document Ref 6.23).
- 11.6.5 In advance, respondents were given details of the Proposed Development including its scale and location. The following text was used:
- “SP Manweb is currently developing proposals to connect a number of new wind farms in North Wales to the electricity distribution network. The new wind farms are Brenig, Nant Bach, Derwydd Bach and Clocaenog Forest.*
- The Project consists of proposals for a new 132kV overhead line connection, together with required accesses, construction laydown areas and other integral works. The proposed overhead line connection would start at a new collector substation at Clocaenog Forest that will collect the power generated by the new wind farms. The overhead line connection would then continue to a Terminal Pole to the south of Glascoed Road, B5381. After the Terminal Pole the connection will continue underground to connect into the national transmission network at the existing St Asaph substation. **Please note this underground connection does not form part of "the Project" going forward.***
- Would you be willing to answer a few questions about your business and how if at all the proposals might affect you?”*
- 11.6.6 Specifically, respondents were asked what potential impacts they considered the Proposed Development would have on their business as well as on tourism in the region. They were then asked to justify the reasoning for their response.
- 11.6.7 A total of 41 businesses were identified and contacted, with 15 responding to the questionnaire, giving a 37% response rate. This is considered to be a reasonably good response rate. Tourism related business surveys typically receive a response rate of around 40%.⁴⁰ The business survey results are therefore considered to be sufficiently credible.

⁴⁰ Source PBA. PBA has carried out c.50 tourism related business surveys for energy related developments since 2005.

Analysis Methodology

Definition of Scale of Impact on Business

11.6.8 The scale of adverse or beneficial impacts of the Proposed Development on both the individual businesses and wider tourism generally was defined as follows:

- Low Impact = less than 10% reduction or increase on business turnover;
- Medium Impact = between 10 and 15% reduction or increase on business turnover; and
- High Impact = greater than 15% reduction or increase on business turnover.

11.6.9 The definitions of thresholds for low, medium and high adverse and beneficial impacts have been developed through a series of energy infrastructure assessments undertaken by Peter Brett Associates and originate from the general consensus of views from previous respondents.

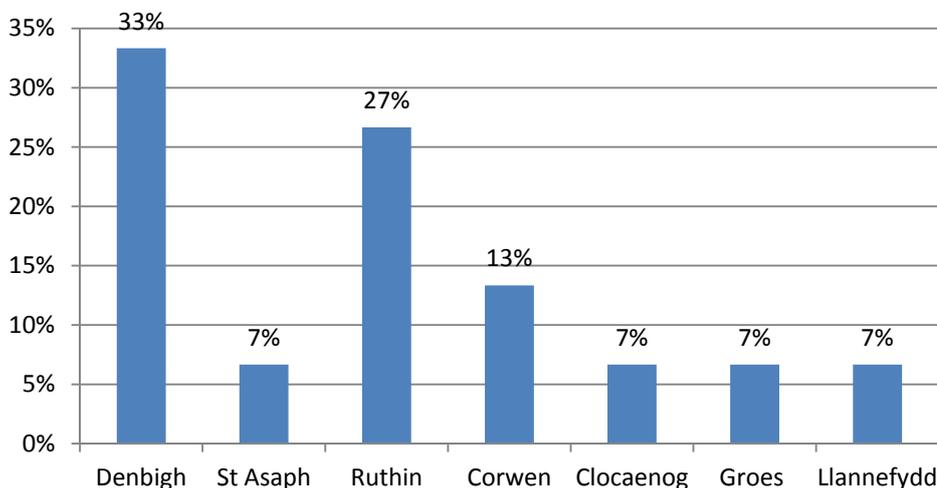
Survey Results

11.6.10 The profile and responses of tourism businesses are presented in this section.

Geographical Breakdown

11.6.11 A third of responses (33%) were from businesses located in Denbigh, which is unsurprising given that it is the largest settlement in the Study Area and has the highest concentration of tourism-related businesses. Over a quarter of responses were from businesses located in Ruthin. Other responses were received from Corwen, St Asaph, Clocaenog, Groes and Llanefydd.

Figure 11.2 Respondents: Geographic Profile

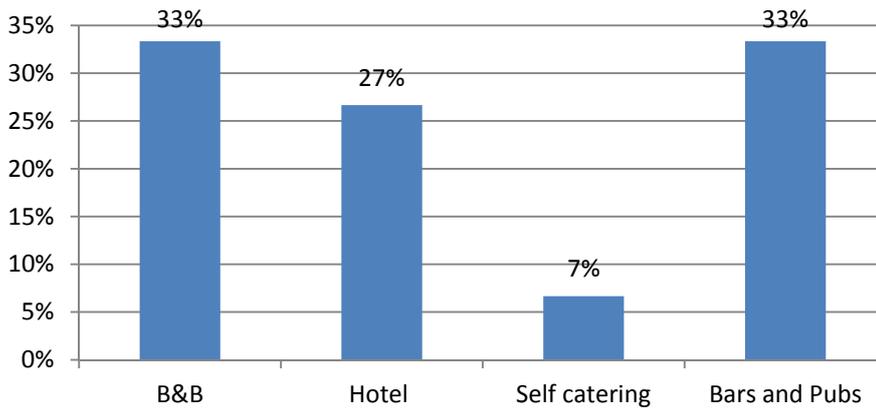


Type of Business

11.6.12 An equal proportion of responses were received from B&Bs and Bars and Pubs (33% each), followed by hotel accommodation (27%).⁴¹ Self-catering accounted for 7% of total responses⁴².

⁴¹ A full audit of tourism related businesses was carried out to be as inclusive as possible.

Figure 11.3 Type of Business



Bed Spaces

11.6.13 Ten of the accommodation providers gave details of the number of bed spaces. The scale of facilities at any one accommodation provider ranged from six to 25 bedrooms. This indicates that the majority of respondents are small scale accommodation providers.

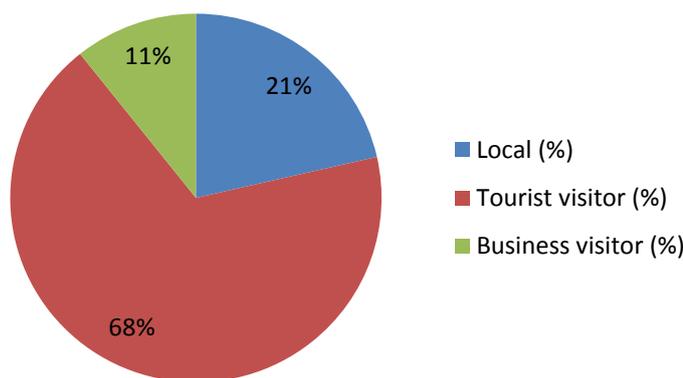
Number of Employees

11.6.14 Of the five businesses responding to this question three had fewer than 10 employees. One business had over 30 employees, another had approximately 100. This again indicates that the majority of businesses are small scale.

Profile of Customers

11.6.15 Figure 11.4 shows that the vast majority of trade in these businesses comes from tourists and visitors (68%), with only a limited proportion (11%) from business visitors. Over a fifth of trade (21%) stems from a local customer base.

Figure 11.4 Profile of Customers

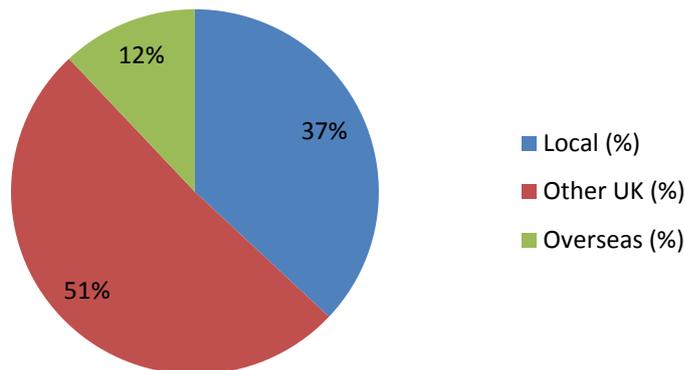


⁴² Two caravan parks were included in the business survey sample (one in Saron and the other in Denbigh) but neither responded.

Origin of Customers

11.6.16 Analysis of the survey results shows that, based upon tourism businesses understanding of their demographic, over half of tourists/visitors (51%) are from the UK outside the local area. There are also a significant number of customers (17%) who come from the local area⁴³ while overseas tourists/visitors represent the lowest proportion (12%) (see Figure 11.5).

Figure 11.5 Origin of Customers

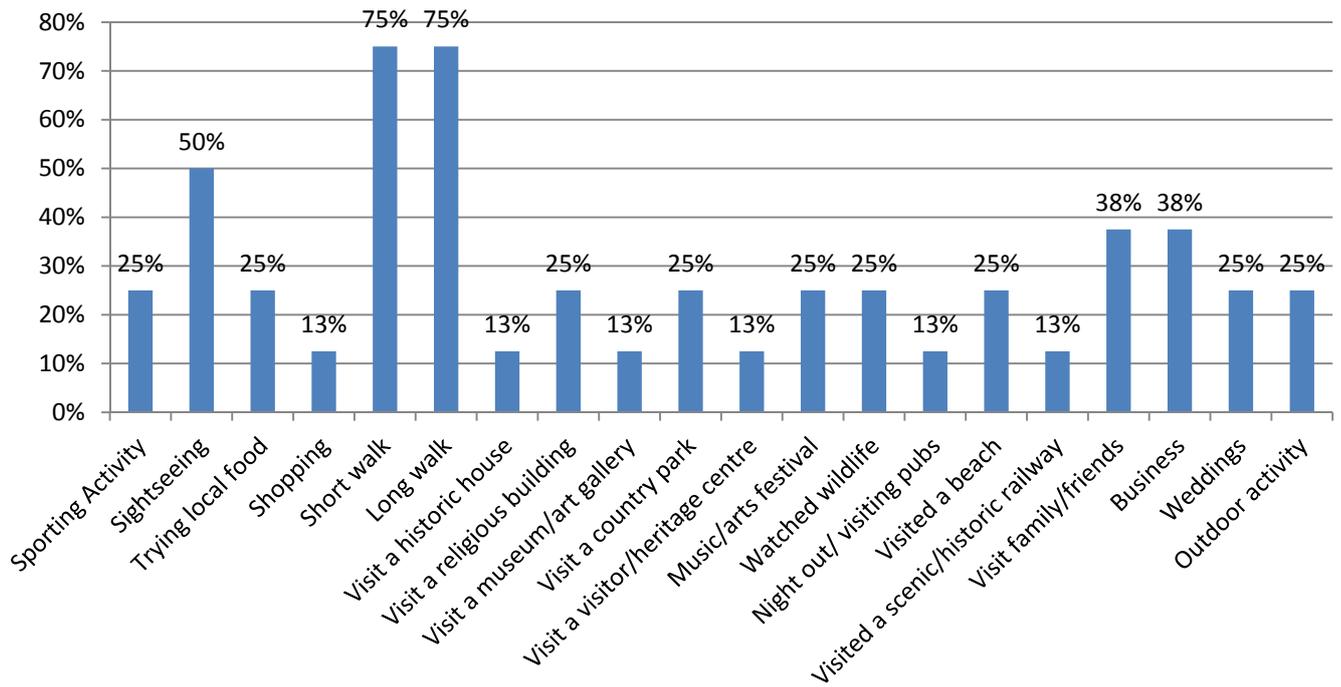


Main Activities Undertaken by Customers/Visitors

11.6.17 The respondents stated their customers were involved in a wide variety of activities but the most popular was going on short and long walks, identified by 75% of businesses surveyed. Half of respondents stated that visitors liked to go sightseeing.

⁴³ Respondents self-defined 'local'. There are likely to be variations in what respondents define as 'local'.

Figure 11.6 Main Activities of Tourists / Visitors

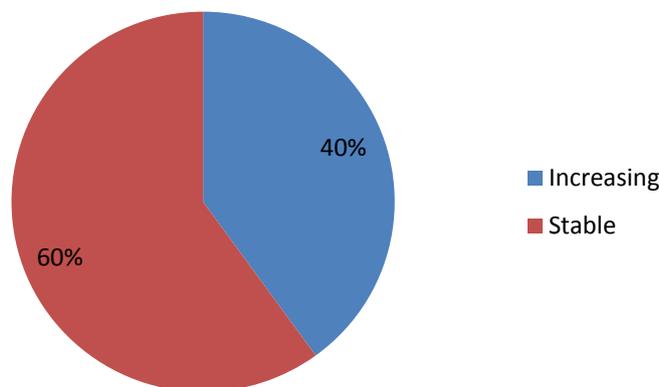


Business Performance

Last 3 years

11.6.18 Most businesses (60%) stated their business performance had remained stable over the last three years, which is positive given the current financial and economic climate. Over a third (40%) reported increasing business performance while no business reported a declining business performance (see Figure 11.7).

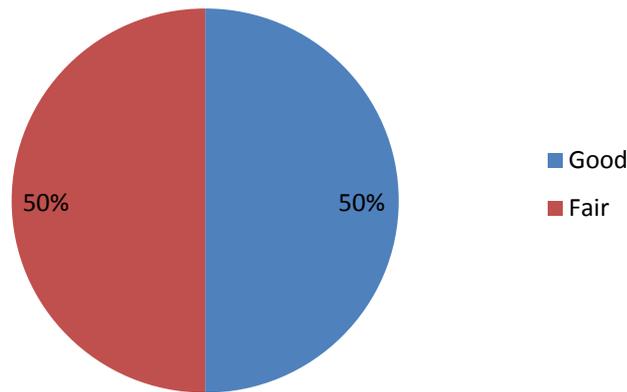
Figure 11.7 Level of Satisfaction with Business Performance over Last 3 Years



Current Position

11.6.19 Respondents reported general satisfaction with their current trading performance. There was an even split between those reporting either a good or fair current business performance. Out of those respondents who answered this question, none reported a poor current business performance (Figure 11.8).

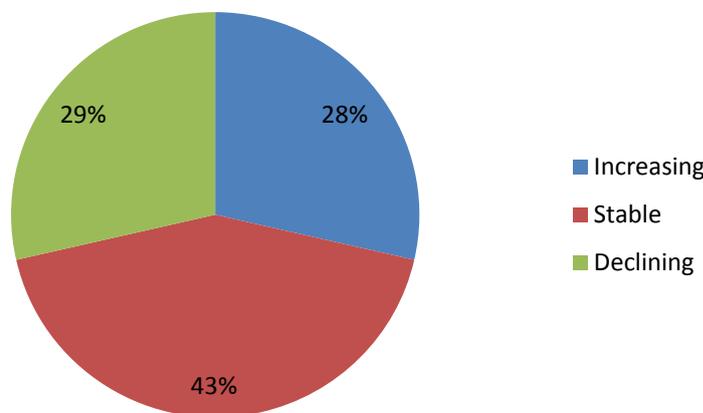
Figure 11.8 Level of Satisfaction with Current Level of Business Trading



Future Prospects

11.6.20 Respondents had an optimistic outlook for tourism-related business activity in the study area with some (28%) respondents predicting increased future business performance. Nearly half of respondents (43%) felt that future business performance would be stable. However, nearly a third (29%) of respondents expressed concern that business performance was likely to decline (see Figure 11.9).

Figure 11.9 Predicted Future Level of Business Trading



Factors influencing Business

11.6.21 Respondents were asked to comment on the factors influencing business trends. Business and economic conditions were considered to be influential. Of the three respondents who mentioned it, one considered it to be the most important factor influencing their business trends. Two considered reputation to be an influencing factor, with them both viewing it as the most important. Other factors mentioned included: weather, exchange rates, concerns over terrorism, cheaper air fares, neighbouring facilities, promotion and marketing, product and price and value for money.

Accommodation Businesses Occupancy Rates

11.6.22 Businesses trading in accommodation were also asked to give an indication of their occupancy rates at peak and off-peak times of the year (see Table 11.11). Occupancy rates during the peak season were more than double the rates registered in the off-peak season.

11.6.23 Statistics by VisitWales show occupancy rates for Wales reaches 64% (71% in Hotels⁴⁴, 52% in Guest Houses⁴⁵, 69% in Self Catering accommodation⁴⁶ and 62% in Hostels⁴⁷) during the peak season of June, July and August.

11.6.24 Whereas in the off-peak season through December, January and February the average occupancy rate in Wales is 31% (51% in Hotels⁴⁸, 17% in Guest Houses⁴⁹, 33% in Self Catering accommodation⁵⁰ and 22% in Hostels⁵¹).

11.6.25 The average occupancy rates during the peak season produced through this survey indicate that the area has been able to achieve relatively high occupancy rates. The similar off-peak rates comparable to the Welsh average suggest in part the appeal of the area and that its activities extend all year round. This is unusual for rural areas, which are generally extremely quiet during the off-peak season.

Table 11.11 Occupancy Rates

	Study Area		Wales Average	
	Peak	Off-peak	Peak	Off-peak
Average Occupancy Rates	72%	33%	64%	31%

⁴⁴ Wales tourism accommodation occupancy surveys 2014

⁴⁵ Ibid

⁴⁶ Ibid

⁴⁷ Ibid

⁴⁸ Ibid

⁴⁹ Ibid

⁵⁰ Ibid

⁵¹ Ibid

Tourism Economy Sensitivity

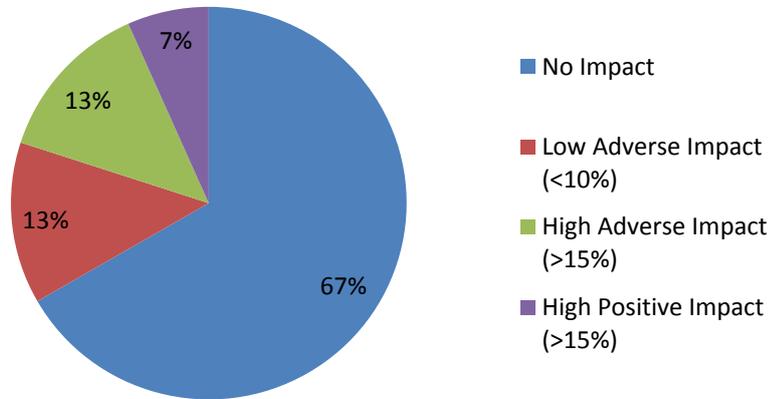
- 11.6.26 There is a low concentration of tourism related businesses in the Study Area. Attractions are also defined as being of local status and generate low visitor numbers. Local tourism businesses also reported relatively positive accounts of how their businesses are currently trading and how they have traded over last few years (i.e. no businesses reported declining trade).
- 11.6.27 The tourism area and tourism businesses surrounding the Proposed Development are assessed as being of low sensitivity.

Survey Results: Perceived Impacts

Impacts of Proposed Development on Individual Business Prospects

- 11.6.28 All 15 respondents commented on the impact they felt the Proposed Development would have on their business. The vast majority (67%) considered that it would have no impact and a further 13% indicated they would expect it to have a low or minimal impact on business performance. Reasons cited for no impact included:
- Overhead line won't be seen from their business;
 - Overhead line would be too far away from their business to affect them directly; and
 - People may not like overhead lines but will not put them off coming to the area.
- 11.6.29 One respondent noted that the Proposed Development could have positive impacts on business trading – principally through workers coming to the area during the construction period.
- 11.6.30 13% of respondents stated that the Proposed Development would have a high (and significant) adverse impact on their business. In total, two businesses identified predicted high adverse impacts (one from Ruthin, and one from Groes). Both of these respondents are accommodation providers. The business in Groes is located within 2km of the Proposed Development whereas the business in Ruthin is located further away at over 12km from the Proposed Development. The main reason for citing a potential high adverse impact was due to the overhead line being perceived as having a negative visual impact on the countryside, with unspoilt views being affected. One respondent noted that in their view there was already "too much clutter", which would potentially put people off coming to the area.

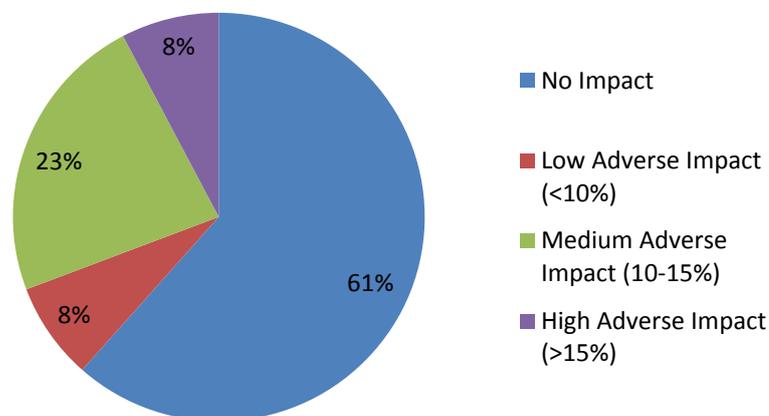
Figure 11.10 Impact of Proposed Development on Local Business Prospects



Impacts of Proposed Development on North Wales’ Tourism

- 11.6.31 Businesses were also asked to indicate what they expected the impact of the Proposed Development might be on North Wales’ tourism in general. Again, the majority felt there would be no impact on tourism and visitor numbers, with a further 8% considering any adverse impact to be low or minimal. Some respondents felt that tourists/visitors were already accustomed to overhead lines and hence won’t be put off coming to the area because of the Proposed Development (Figure 11.11).
- 11.6.32 A medium adverse impact was expected by 23% of respondents and a further 8% felt it would have a high adverse impact on north Wales’ tourism, representing a perceived significant adverse impact of 31% of respondents. As mentioned above, respondents considered that there could be negative visual impacts, with the landscape being potentially spoiled, which would deter tourists/visitors from coming to the area. One respondent considered that power lines in general ruin the countryside.

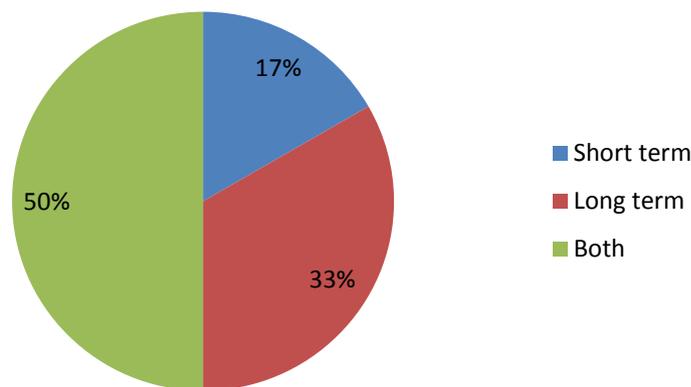
Figure 11.11 Impact of Proposed Development on North Wales Tourism



Duration of Negative Impacts as Result of the Proposed Development

- 11.6.33 Respondents were also asked if they considered that the negative impacts would be either short-term (during the construction and decommissioning phases only), long-term for the entire operational life of the Proposed Development or both (Figure 11.12). 50% of respondents considered that the negative impacts would be both short and long term. Only 17% considered that the impacts would last for the short term.

Figure 11.12 Duration of Negative Impacts of Proposed Development



Potential Benefits of the Proposed Development

- 11.6.34 Respondents were asked whether they felt that the Proposed Development could have a positive impact on business performance. Four respondents did not feel that the Proposed Development would have a positive impact on business due to factors such as distance from Proposed Development, price of accommodation being too expensive for construction workers, and reluctance on the part of the business to accommodate construction workers in general. However, two businesses did consider that providing accommodation for construction workers would lead to increased custom.

Additional Comments

- 11.6.35 Respondents were given the opportunity to add further comment on the Proposed Development. Two respondents noted that it would be more beneficial if the overhead line connection was to be underground so as to minimise the negative visual impact on the countryside. Another respondent noted that he had made a significant investment into his business and that the Proposed Development could jeopardise this outlay. He noted that mitigation through compensation may be possible.
- 11.6.36 One respondent did note a positive aspect of the Proposed Development stating that *"anything involving wind energy is good news"*.

Conclusions

Business Survey Baseline Summary

- 11.6.37 Of the 41 businesses surveyed, 15 responded to the tourism business survey questionnaire, giving a 37% response rate.
- 11.6.38 The majority of respondents were from either Denbigh or Ruthin. Respondents were mainly B&Bs or bars/pubs. Over two thirds of respondents' trade came from tourists/visitors to the area. The origins of these tourists were mainly from within the UK. The main activities undertaken by tourists included walking and sightseeing.
- 11.6.39 The majority of businesses considered their business performance had remained stable or increased over the last three years. Current levels of business satisfaction were high, with respondents reporting trade as being either fair or good. Respondents were also optimistic that their future business performance will improve.
- 11.6.40 Business and economic conditions and reputation were deemed to be the most influential factors impacting upon business trends. Occupancy rates in the area, both peak and off-peak, are higher than the national average.

Business Survey Impacts Summary

- 11.6.41 The majority of respondents considered the Proposed Development would have either no impact or a low adverse impact on their own business performance or wider North Wales' tourism.
- 11.6.42 Some respondents felt that visitors would not be deterred from visiting the area as overhead lines and their associated infrastructure is common place in the countryside. Others felt that their business was located too far away to be directly affected. Some businesses recognised the potential short-term increase in custom, which may occur as a result of construction workers staying in the area.
- 11.6.43 The major concerns arising from the business survey relates to potential visual impact of the Proposed Development and the perception that this will affect the countryside and deter tourists from coming back to the area.

Perceived Impact

- 11.6.44 Further assessment and analysis is carried out in the 'Assessment of Effects' section of this chapter to determine the strength of evidence to substantiate the businesses concerns. The comments from the business survey relating to visual impact have been cross referenced and considered in accordance with Chapter 7, 'Landscape and Visual'.
- 11.6.45 An in-depth analysis of comparator research has also been carried out to determine whether tourism businesses have experienced adverse effects as the result of the development of overhead lines elsewhere. The findings of relevant comparator studies are outlined below.
- 11.6.46 Comparative research on the socio-economic and tourism effect of overhead line developments in the UK has been reviewed to set a comparative research context against which the results of the tourism analysis can be viewed.

11.6.47 It should be noted that the examples provided below are for overhead lines supported on steel lattice towers. It is reasonable to assume that the impact from such lattice tower based overhead lines of up to 50m in height will be greater than the impact of an overhead line supported by wooden poles of up to 15m in height.⁵²

Second Yorkshire Line Ex Post Tourism Assessment (RTP 2011)

11.6.48 The Second Yorkshire Line (a 400kV overhead transmission line and associated works) was granted consent in 1998 following two Public Inquires in 1992 and 1995. Its route travels 80.3km from Lackenby, east of Middlesbrough, through North Yorkshire to Shipton, north of York. It has a 5.3km underground section from Nunthorpe to Newby. Towers typically range between 46.5m - 49.0m in height.

11.6.49 A post-development evaluation was carried out between May – August 2011 of the Second Yorkshire Line's impact on the area's tourism industry from 1999-2007. It assessed whether or not any impacts or effects were experienced in the tourism economy/market over the period in which the overhead line was planned, constructed and became operational.

11.6.50 In total, 97-99% of respondents operational at the time stated the Second Yorkshire Line did not have a negative impact on their business (Table 11.12). It is estimated that around 1%-3% of businesses experienced a medium negative impact (i.e. up to a 10% reduction in turnover/ visitors or customers) as a result of the line while 1% experienced a major negative impact (of up to 15% on turnover/ visitors or customers). An estimated 96% of tourism related businesses experienced no negative impact from the overhead line.

Table 11.12: Second Yorkshire Line Impact on Operational Businesses

	No. of Responses	No Negative Impact		Minor Negative Impact		Medium Negative Impact		Major Negative Impact	
		No.	%	No.	%	No.	%	No.	%
1999-2000	93	92	99%	0	0%	1	1%	0	0%
2001-2003	97	94	97%	0	0%	3	3%	0	0%
2003-2007	103	100	97%	0	0%	2	2%	1	1%

Source: RTP 2011

11.6.51 This limited impact is consistent with the findings of a similar post-development evaluation of the tourism impact of a major overhead line in Scotland. Further details are provided below.

⁵² Scoping Report, Page 14.

Scotland/Northern Ireland Interconnector Post Tourism Impact Assessment (RTP 2006)

- 11.6.52 RTP carried out a post-development evaluation of the impact upon the tourism industry and economy of Ayrshire & Arran of the planning, construction and operation of the Scotland – Northern Ireland 275kV overhead transmission interconnector.
- 11.6.53 The overriding majority of respondents (97%) said that the line had no impact on their business patterns recently or over the last ten years (Table 11.13).

Table 11.13: Scotland-NI Overhead Transmission Line Impact on all Businesses over 3 Periods

	No.	No Neg've Impact	Minor Neg've Impact	Medium Neg've Impact	Major Neg've Impact	Not Operating then	Don't Know	Positive Impact
2004-2006	105	97%	1%	1%	0%	0%	1%	0%
2000-2003	105	80%	2%	0%	0%	11%	6%	1%
1995-1999	105	73%	2%	0%	0%	13%	11%	0%

Source: RTP 2006

Cairngorms National Park Rationalisation Scheme

- 11.6.54 The Scottish Government attached various conditions to the consent for the Beauldy Denny 400kV overhead transmission grid upgrading project in Scotland. Condition 19 of the Beauldy to Wharry Burn consent granted by Scottish Ministers in January 2010 required an overhead transmission line renewal between Etteridge and Kingussie. This renewal formed 'The Cairngorms National Park Rationalisation Scheme'.
- 11.6.55 This scheme involved decommissioning and the removal of the 132KV steel lattice tower route between Etteridge and Kingussie and replacement with a less visually intrusive wooden pole line. In the Decision Notice Ministers agreed with the Cairngorms National Park Authority (CNPA) view that 'the replacement of the line in this manner will result in a significant improvement from a landscape and visual perspective'. The wooden pole line was recognised as being the preferable option because it was less visually intrusive and in this instance a mitigation measure. This evidence demonstrates the low perceived visual and tourism impact from a wooden pole electricity connector.

Investigation into the Potential Impact of Wind Farms on Tourism in Wales – Summary Report (October 2013)

- 11.6.56 In 2013 surveys of visitors took place across Wales to find out their opinions of the effects of built infrastructure and in particular wind farms on the Welsh countryside and coast. In total, 25% of respondents considered that telephone wires and poles had detracted from the experience of visiting the countryside. The Proposed Development would be comparable with telephone poles and wires in that it will be built on wooden poles. This is similar to the proportion of people who considered that wind farms and turbines (23%) had detracted from their experience of the countryside.
- 11.6.57 Nearly half (48%) of all respondents considered that electricity steel lattice towers and wires had detracted from the experience of visiting the countryside making this the most negative type of facility/development according to most visitors. The Proposed Development would be of a less visually intrusive scale.

Conclusions on Comparator Studies

- 11.6.58 The results of the Scotland - Northern Ireland Interconnector post-development Tourism Impact Assessment and Second Yorkshire Line post-development Tourism Assessment show only a minimal number of businesses (i.e. around 3%) experienced a negative adverse effect from these much larger scale electricity interconnector projects. These structures were also much more substantial and visible than the double wood pole structures proposed as part of this Proposed Development.

11.7 Embedded Mitigation

The LVIA Chapter 7 Section 7.6 outlines embedded mitigation for the Proposed Development. This involves reinstating vegetation, trees, hedgerows, soils and other environmental resources which are removed or displaced during construction. Trees in particular would be replaced on a two-to-one basis. The Proposed Development's embedded mitigation will ensure visual impacts are minimised.

11.8 Assessment of Effects

Socio-Economics

Construction

- 11.8.1 Construction of the Proposed Development will require a small number of suitably skilled and experienced temporary construction workers.
- 11.8.2 The Design and Concept Report (DCO Document Ref 7.1) estimates up to 25 construction workers would be required over a 16 month period.
- 11.8.3 The assembly of wood pole overhead lines is however a highly specialised activity. Elements of the construction phase may require input from the local workforce however this is likely to be a negligible requirement and will not constitute a significant impact for the local workforce. Local accommodation providers may however benefit during the construction phase.

11.8.4 The Proposed Development would have a **minor** beneficial effect on employment during the construction phase.⁵³

Operation and Maintenance

11.8.5 Maintenance services would be required during the operational phase, which is expected to last 40 years or more. However it is likely these interim services would be provided by existing SP Manweb staff or from specialised firms and will not translate into permanent long term jobs for the local area.

11.8.6 The Design and Concept Report (DCO Document Ref 7.1) states "132kV cable systems are maintenance free other than for non-invasive periodic electrical tests. Future work is only likely to be required in the event that the cable is damaged."⁵⁴

11.8.7 The Proposed Development would have a **negligible** effect on employment during the operation and maintenance phase.

Decommissioning

11.8.8 Decommissioning would take place in 40 years' time and may use new techniques to current practice.

11.8.9 The decommissioning effects at this stage are considered to be comparable to the construction effects. Suitably qualified skilled workers would be required for the decommissioning phase.

11.8.10 The Proposed Development would have a **minor** beneficial effect on employment during the decommissioning phase.

Overall Significance

11.8.11 The socio-economic receptor (i.e. the labour market surrounding the Proposed Development) is assessed as being of low sensitivity, while the magnitude of effect is assessed as being of **negligible** scale for the construction, operation and maintenance and decommissioning phases of the Proposed Development.

11.8.12 Overall significance of impact is considered to be **not significant** (using the Significance of Impact Table (Table 11.8)).

Tourism Economy

11.8.13 The tourism related business survey results and comparator research evidence base indicate that the Proposed Development is likely to have a negligible/ low adverse effect on the area's tourism economy.

11.8.14 One business is however within close proximity of the route and may be moderately (and hence significantly) affected by the Proposed Development.

⁵³ Small scale effects would arise, with a limited number of affected receptors; and/or where the number of jobs created or lost in the Study Area would be greater than 10, but fewer than 50. Effects would be short-term (i.e. one-two years).

⁵⁴ Design and Construction Report (DCO Document Ref 7.1) Page 69

Overall Significance

- 11.8.15 The Proposed Development is unlikely to have any significant adverse effects on the overall tourism economy during the construction, operation and decommissioning phases.
- 11.8.16 The tourism receptor (i.e. tourism business and tourism economy surrounding the Proposed Development) is assessed as being of low sensitivity, while the magnitude of effect is assessed as being of **negligible** scale.
- 11.8.17 Overall significance of impact is considered to be **not significant** (using the Significance of Impact Table (Table 11.8)).

Tourism Receptors

- 11.8.18 Table 11.14 shows the sensitivity, magnitude of effect and overall significance of impact on individual tourism receptors identified in the baseline. The sensitivity and magnitude of effect is informed by the tourism baseline in this chapter and the Proposed Development's LVIA Chapter.
- 11.8.19 The Proposed Development will not have any significant impacts on the individual tourism receptors within the study area or on the edge of the study area.

Table 11.14: Individual Tourism Receptors

Receptor	Sensitivity of receptor	Magnitude of effect	Significance
Within Study Area			
Bodelwyddan Castle and Park	Medium (regional scale attraction)	Negligible ⁵⁵	Not significant
St Asaph Cathedral	Medium (regional scale attraction)	Minor ⁵⁶	Minor significance (Not significant)
The Clwydian Way regional trail	Medium (regionally valued and promoted)	Minor ⁵⁷	Minor significance (Not significant)
North Wales Pilgrim's Way long distance footpath	Medium (regionally valued and promoted)	Minor ⁵⁸	Minor significance (Not significant)
A55 "North Wales Expressway"	Medium (regional road)	Minor ⁵⁹	Minor significance (Not significant)

⁵⁵ As confirmed in Chapter 7 LVIA (Table 7.16)

⁵⁶ Ibid

⁵⁷ Ibid

⁵⁸ Ibid

⁵⁹ The LVIA chapter states 'effects would be localised, transient and would diminish rapidly with distance.' These effects would be further diminished by tree and hedge row planting.

Receptor	Sensitivity of receptor	Magnitude of effect	Significance
A543 (Pentrefoelas to Bodfari via Denbigh)	Low (local road)	Minor ⁶⁰	Minor significance (Not significant)
Outwith Study Area⁶¹			
Wireless in Wales Museum	Low	Negligible ⁶²	Not significant
Denbigh Castle	Medium	Minor ⁶³	Minor significance (Not significant)
Llyn Brenig Visitor Centre	High	Negligible ⁶⁴	Not significant

Individual Tourism Business Analysis

- 11.8.20 The tourism assessment above considers the impact of the Proposed Development on the tourism economy in a broad sense. Part of this assessment included a tourism business survey. The majority of tourism business respondents stated the Proposed Development would have 'no impact' on their business or the North Wales tourism economy.
- 11.8.21 However two businesses believed the Proposed Development would have a high adverse impact on their business turnover or customer base as a result on perceived visual impacts. Overlaying the Proposed Development's ZTV with the location of each these businesses allows for a more detailed assessment of their concerns.
- 11.8.22 One business (an accommodation provider) is located outwith the area of visibility which suggests their perceived fears of a 'high adverse impact' due to visual impacts are unlikely to arise.
- 11.8.23 One business (also an accommodation provider) is however located within immediate proximity of the Proposed Development and may experience a significant moderate to high adverse impact due to visual impacts.

⁶⁰ ibid

⁶¹ Important attractions located just outside the Study Area

⁶² Indoor attraction located in a built-up urban environment

⁶³ As confirmed in Chapter 7 LVIA

⁶⁴ Chapter 7 LVIA states 'There are unlikely to be any views of the line from the south, from Llyn Brenig'

11.9 Specific Mitigation

- 11.9.1 No specific temporary or permanent socio-economic or tourism mitigation is required.

11.10 Assessment of Residual Effects

- 11.10.1 The Proposed Development will not lead to any significant adverse socio-economic labour market effects or significant adverse effects on the overall tourism economy or tourism related receptors. The residual socio-economic and tourism effects will therefore also be **not significant**.
- 11.10.2 One business located within the immediate proximity of the Proposed Development may however experience a **significant** effect due to proximity and potential visual impacts (as confirmed by the Proposed Developments ZTV and LVIA Chapter).

11.11 Assessment of Cumulative Effects

Socio-economics

- 11.11.1 Preparing a cumulative labour market assessment is not considered to be relevant for this project. The Proposed Development requires a minimal level of specialist labour which is likely to be temporarily imported to the area. Combining the Proposed Development with the Wider Scheme, the Wind Farms, and the identified Stage 1 and Stage 2 'cumulative' developments negligible employment impacts with potentially significant employment impacts from larger scale projects requiring unspecialised local labour would therefore provide misleading results.

Tourism

- 11.11.2 Visual impact is the most commonly cited factor by business survey respondents when asked to explain their reasons for perceived impact. The LVIA Chapter states that moderate to major cumulative effects would primarily be due to the additional visual impacts of the wind farms⁶⁵ being located close to the proposed line rather than the line itself which would be viewed as a subsidiary structure.
- 11.11.3 The LVIA Chapter further states 'the contribution of the North Wales Wind Farm Connections Project to the total cumulative landscape and visual effects are not significant.'⁶⁶
- 11.11.4 The Proposed Developments overall tourism impact based on the findings of the LVIA Chapter are considered to be not significant.

⁶⁵ In particular the single wind turbines (Tyn y ffynnon, Meifod Farm and Hafod Ty Ddu)

⁶⁶ 'Overall the significance of the contribution of the North Wales Wind Farm Connections Project to the total cumulative landscape effects is considered to be of low magnitude and minor significance and as such, no mitigation measures are proposed and the residual effect is likely to remain the same.'