

14. Socioeconomics, Land use and Recreation

14.1 Introduction

- 14.1.1 An assessment will be undertaken of the likely significant effects of the Proposed Development on socio-economic receptors, including population and communities, employment and skills, local and regional business activity (including supply chain), tourism and recreation. The assessment will identify potential adverse and beneficial effects for construction, operation and decommissioning, and will define proportionate study areas and significance criteria appropriate to the rural mid Wales context.
- 14.1.2 Fferm Wynt Nant y Maen Wind Farm was initially identified as an onshore wind development opportunity in 2017. The Proposed Development is situated approximately 8 km east of Tregaron within Ceredigion County Council's administrative area. This locational context informs the socio-economic baseline (including the rural settlement pattern, key service centres and tourism/recreation assets) and helps define the local study area for community and business receptors.
- 14.1.3 An indicative construction access route has been identified. The socio-economic assessment will consider potential effects arising from construction traffic and any temporary disruption to local businesses and recreational users along the construction access route(s). Where access options remain under consideration, the assessment will identify the reasonable worst-case access assumptions to inform scoping and baseline data collection.
- 14.1.4 A grid connection offer has been made for Fferm Wynt Nant y Maen Wind Farm; however, the exact grid connection point, route and detailed delivery programme have not yet been confirmed. At ES stage, the socio-economic assessment will consider the potential implications of grid connection delivery using a desk-based approach and reasonable worst-case assumptions where necessary. This will include consideration of potential construction programme interactions, phasing, employment and supply chain effects, and any temporary disruption to local communities, businesses or recreational users where relevant information is available. Battery energy storage (BESS) is also to be included within the Proposed Development; the assessment will include the likely changes to construction employment, traffic and supply chain effects associated with BESS as part of the reasonable worst-case scenario.
- 14.1.5 The Proposed Development is expected to comprise up to 27 wind turbines with a maximum blade tip height of up to 230 metres. These parameters will inform the socio-economic assessment where tourism and recreation effects are linked to changes in landscape setting and visitor experience (in addition to any temporary construction-related disruption).

14.2 Study Area

- 14.2.1 The socio-economic study area will comprise: (a) a local study area defined by an approximate 10 km radius from the Proposed Development to capture communities and businesses most likely to experience localised effects (including construction disruption and local supply chain opportunities), and (b) a wider regional and national context to reflect the geographic distribution of construction supply chains and operational expenditure. In addition, where relevant (e.g. tourism/recreation and construction traffic disruption), specific receptor-based corridors/locations will be considered along the construction access route(s) and key visitor destinations.

Study Area Definition

- 14.2.2 To determine the scope of the economic context, a local socio-economic study area has been identified for the Proposed Development. The local study area has been defined to capture those communities, businesses and economic receptors most likely to experience effects as a result of the Proposed Development, particularly during construction. Key receptor types to be considered include local communities, local businesses (including tourism-related businesses), recreation assets and users, and the construction supply chain.
- 14.2.3 The use of an approximate 10 km radius is proposed to provide a consistent local baseline for community and business receptors in the rural context around the Proposed Development. This will be supplemented by receptor-led consideration of specific locations where socio-economic effects could arise (for example, settlements and businesses along the construction access route(s), and key tourism and recreation destinations potentially influenced by changes to visitor experience).
- 14.2.4 The study area and baseline will use a combination of geographies, selected to match available Welsh datasets. Local community baseline will be described using ward-level data (for wards within approximately 10 km of the Proposed Development) and, where relevant, Lower Super Output Area (LSOA)/Middle Super Output Area (MSOA) level data to support indicators such as deprivation and earnings. Local authority-level data will be used for Ceredigion and Powys to provide wider context and to support metrics where lower-geography data are not available or not robust.
- 14.2.5 The socio-economic impacts of the Proposed Development will be determined for three geographic scales: (i) a local study area based on wards that fall within approximately 10 km of the Proposed Development (to consider community and local business effects), (ii) the relevant local authority areas (Ceredigion and Powys) to provide a wider context and to capture effects where data are only available at this scale, and (iii) the national context

(Wales and UK) to reflect the wider supply chain and economic effects. The local study area is shown in Plate 14-1 below.

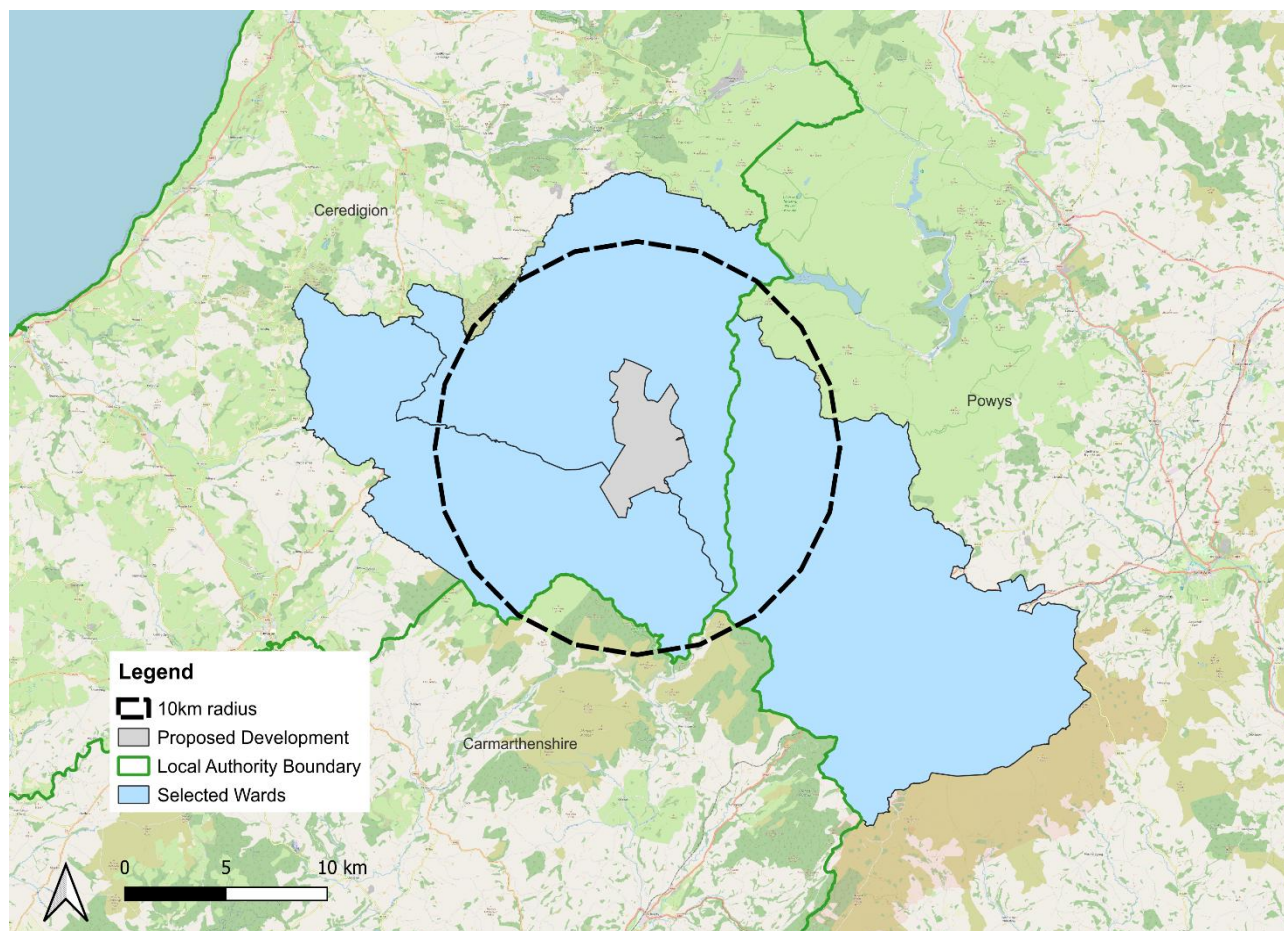


Plate 14-1 – Fferm Wynt Nant Y Maen Wind Farm socio-economic study area

- 14.2.6 The key wards identified within the study area comprise Tregaron and Ystrad Fflur, and Llangeitho in Ceredigion, and Llanwrtyd Wells in Powys. A small number of additional wards intersect with the defined 10 km study area boundary. These wards have not been included within the ward-based baseline where only a very limited land area falls within 10 km and initial checks indicate no settlements within the intersecting areas. Notwithstanding this, the assessment will still identify any relevant non-residential receptors within the 10 km area (for example, tourism and recreation receptors such as Public Right of Way (PRoW), visitor attractions, and dispersed businesses), regardless of ward boundaries.
- 14.2.7 Economic impacts at the local authority level (Ceredigion and Powys) and national level (Wales and UK) will also be considered. This will reflect that a proportion of construction and operational expenditure will occur beyond the immediate local area, depending on the location of contractors and suppliers. The assessment will describe assumptions on the geographic distribution of benefits (including potential leakage outside Wales and the UK) and, where a quantitative model is used, will present scenarios that test alternative local/Wales/UK retention rates for spend and employment.

14.3 Baseline Context

Policy context

- 14.3.1 The Welsh Government is committed to achieving net zero by 2050, in line with the UK target, and aims for 70% of energy consumption from renewable sources by 2030 (Welsh Government, 2022). Meeting these goals will require significant onshore wind development, with the UK estimated to need 35 GW of onshore wind capacity by 2035 (Committee On Climate Change, May 2019).
- 14.3.2 The Proposed Development will be delivered under the Significant Infrastructure Project (SIP) regime, established by the infrastructure (Wales) Act 2024, with consent sought through an Infrastructure Consent Order (ICO) (Welsh Government, August 2025). This chapter of the Scoping Report uses Welsh EIA terminology under the Town and Country Planning (Environmental Impact Assessment) (Wales) Regulations 2017 (as amended), as applicable to the project.
- 14.3.3 The primary national planning policy framework relevant to large renewable energy infrastructure in Wales includes Future Wales: The National Plan 2040 (Welsh Government, February 2021), which builds on the Well-being of Future Generations (Wales) Act 2015. Future Wales sets out a vision for sustainable growth, focusing on job creation (including in rural areas), reducing pollution, decarbonisation, and climate resilience. These ambitions underpin policies on rural economic regeneration, natural resource use, and renewable and low-carbon energy infrastructure, and are relevant to the assessment of socio-economic effects for the Proposed Development.
- 14.3.4 Planning Policy Wales (PPW) complements Future Wales by prioritising low-carbon objectives in decision-making. Beyond planning, Prosperity for All: A Low Carbon Wales (Welsh Government, March 2019), based on the Wales Environment Act, outlines how Wales can transition to a low-carbon economy, delivering benefits such as clean growth, quality jobs, improved health, and environmental sustainability. Onshore wind development directly supports these aims by creating high-value jobs, reducing emissions, and diversifying the economy.
- 14.3.5 The Welsh Government's green jobs strategy, Capturing the Potential, positions the low-carbon sector as a driver of economic development (Welsh Government, July 2009). Following the Covid-19 pandemic, Welsh Government has reinforced its commitment to a Green Recovery, focusing on sustainable businesses, clean energy investment, innovation, and skills development in a low-carbon economy. Onshore wind projects contribute to these goals and foster positive attitudes toward clean energy, unlocking further opportunities.
- 14.3.6 At a regional level, Mid Wales Growth Deal, has confirmed investment of up to £110 million for the region (Growing Mid Wales, 2022). The Deal identifies eight priority areas for intervention, including energy, with an emphasis on maximising the value of Mid Wales' natural resources to support clean growth and high-value job creation. The region already

generates 97% of the electricity it consumes from local renewable sources (predominately onshore wind) (Growing Mid Wales, 2020), and benefits from a strong innovation and research base through institutions such as the Centre for Alternative Technology (CAT) and Aberystwyth University's The Institute of Biological, Environmental and Rural Sciences (IBERS). In this context, the Proposed Development is well placed to play a leading role in supporting the region's strategic priorities, offering the potential to deliver local economic benefits while contributing to the wider energy transition.

- 14.3.7 At the local level, the Proposed Development also aligns with recent policy priorities in both Ceredigion and Powys. Ceredigion County Council's Corporate Strategy 2022–2027 identifies "boosting the economy, supporting businesses and enabling employment" as a key well-being objective, alongside wider commitments to sustainability and community well-being (Ceredigion County Council, 2022). Similarly, Powys County Council's Corporate and Strategic Equality Plan 2023–2027, Stronger, Fairer, Greener, places emphasis on sustainability, community resilience and improving local well-being (Powys County Council, 2023). In 2024, both Ceredigion County Council and Powys County Council endorsed their respective Local Area Energy Plans (LAEPs), which set out how each local area can transition to a net zero energy system by 2050. The LAEPs build on the Mid Wales Energy Strategy and will inform the Welsh Government's National Energy Plan. Together, these local policy frameworks indicate support for economic resilience, clean growth and the transition to a low-carbon energy system across the local authority areas relevant to the Proposed Development.
- 14.3.8 The socio-economic assessment will have regard to the relevant Welsh and local policy context identified above, including policies and objectives relating to rural economic resilience, employment and skills, supporting local business and supply chains, and the visitor economy. The assessment will explicitly consider how the Proposed Development may contribute to, or interact with, these policy objectives.

Socio-economic context

Population

- 14.3.9 Using the latest ONS population estimate datasets, the local socio-economic study area (defined by the wards within approximately 10 km of the Proposed Development) has a population of 4,816 (ONS, 2024), of which 55% are of working age and 32% are aged 65+. By comparison, Ceredigion has a population of 72,599 and Powys has a population of 135,059 (ONS, 2024). The age profile in Powys is slightly older, with 29% of residents aged 65 and over and 56% of working age, while Ceredigion has 60% of residents of working age and 29% aged 65 and above.
- 14.3.10 Population density is very low. According to the 2021 Census, Ceredigion and Powys average 40 and 26 residents per km² respectively, compared to 150 in Wales as a whole (ONS, 2021). This reflects the rural character of the area surrounding the Proposed

Development. Where available, ward-level population density for the local study area will also be summarised to provide a more locally specific baseline.

Employment

- 14.3.11 Economic activity rates are above the Welsh average in both local authorities. Ceredigion has an economic activity rate of 80.5%, representing a gradual increase of 13.5 percentage points since 2019, while Powys records a rate of 75.6%, broadly in line with the Wales average of 75.9%.ⁱ
- 14.3.12 Employment rates have also improved since 2019 and are broadly consistent with the Welsh average. Ceredigion records an employment rate of 72.7%, closely aligned with 72.9% in Powys and slightly above the Wales average of 72.3%.
- 14.3.13 Unemployment rates in both Ceredigion and Powys have remained relatively low compared to the Welsh average of 4.7%. In 2025, the unemployment rate was estimated at 4.0% in Ceredigion and 3.6% in Powys, compared to 3.4% and 2.7% respectively in 2019. These figures are based on ONS model-based unemployment estimates, which combine survey and administrative data and are considered more robust for local authority analysis than direct Annual Population Survey estimates, particularly in rural areas where sample sizes can be small. The assessment will use this baseline to help inform sensitivity to employment-related effects associated with the Proposed Development.

Qualifications

- 14.3.14 A high proportion of residents are qualified to RQF Level 4 or above, with 49.9% in Ceredigion and 47.4% in Powys, both exceeding the Welsh average of 44%. In addition, the proportion of residents with no formal qualifications is comparatively low, at 3.8% in Ceredigion and 4.3% in Powys, compared to 8.6% across Wales.ⁱⁱ
- 14.3.15 Job density (the number of jobs per working age resident) within both Ceredigion and Powys is higher than the Welsh average. Ceredigion records a job density of 0.84, while Powys records 0.89, compared to 0.77 across Wales.

Earnings

- 14.3.16 Earnings data will be presented using the most appropriate geography available for robust Welsh datasets (typically local authority level for Annual Survey of Hours and Earnings resident earnings, supplemented where appropriate by MSOA small area income estimates). The assessment will clearly explain how any selected MSOAs relate to the defined local study area (wards within approximately 10 km), and will avoid mixing years unless explicitly justified. Where different datasets/years are used, these will be clearly labelled and referenced.

ⁱ Employment rate – aged 16-64, Annual Population Survey (ONS, 2024)

ⁱⁱ % with RQF4+ - aged 16-64, Annual Population Survey (ONS, 2024)

Sector by Composition

- 14.3.17 ONS Sector data within the local socio-economic study area, based on the three key wards, is driven by public service employment (ONS, 2024). Health is the largest sector, employing approximately 165 people (19%), followed closely by education with 160 employees (18%). Accommodation and food services also represent a large share, with around 115 employees (13%). Construction is another key sector, employing approximately 95 people (11%), while retail accounts for 75 employees (8%). Public administration and defence, and wholesale activities each employ around 50 people (6% respectively).
- 14.3.18 As shown in Plate 14-2 below, there are a total of 45 businesses listed on Data City within the 10 km study area. This provides an initial indication of the scale and distribution of local business receptors; however, the assessment will also consider available ONS/NOMIS business datasets (where appropriate) to ensure the baseline is robust and to explain any limitations in business listings coverage for rural areas.

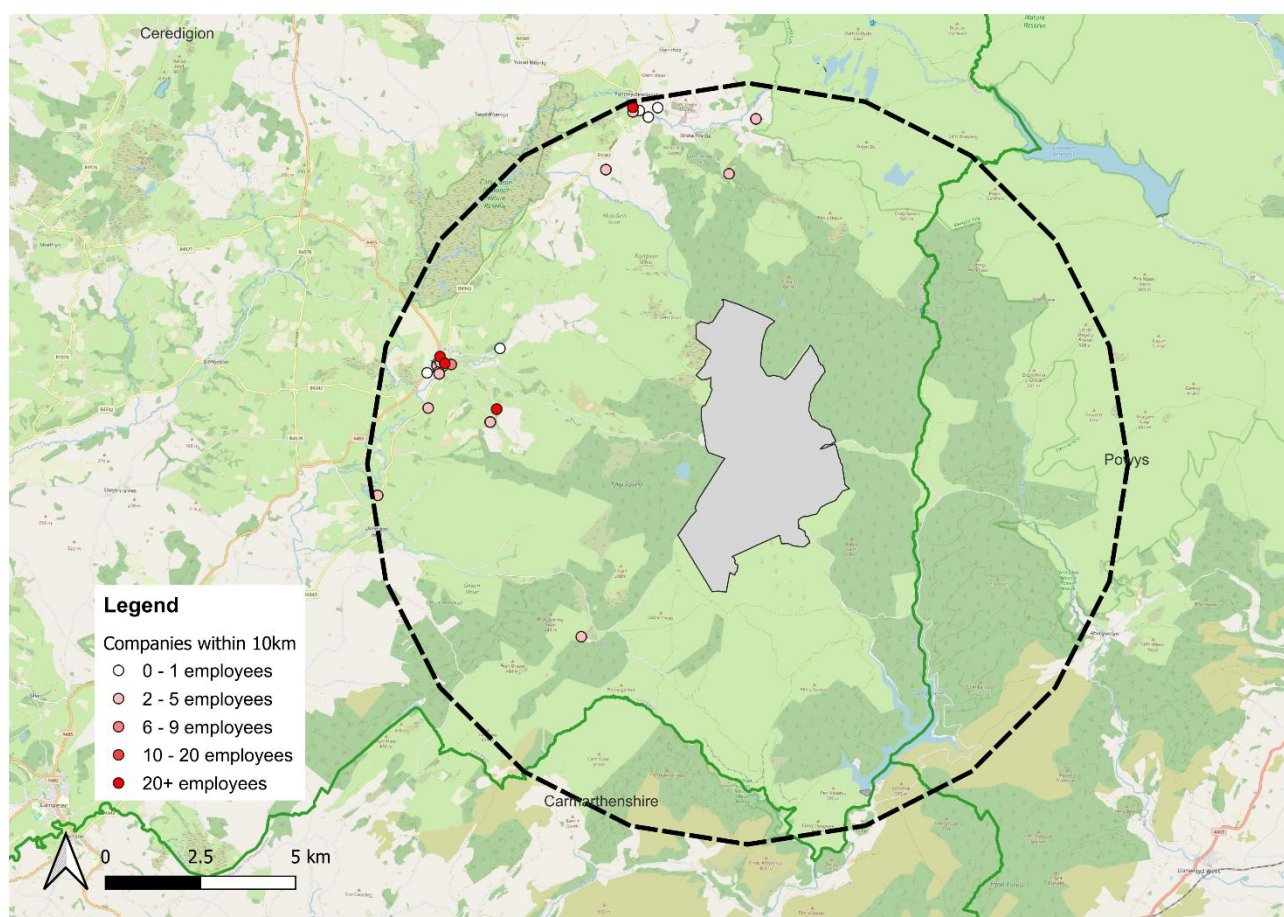


Plate 14-2 - Map of the Proposed Ferm Wynt Nant Y Maen Wind Farm Development and local business units (The Data City, 2025)

Output

- 14.3.19 Across the wider region, Gross Value Added (GVA) in Ceredigion totalled £1.7 billion in 2023. (ONS, 2024) The services sector dominates, contributing £1.3 billion (77% of total GVA). The largest individual sectors include real estate (£280 million), human health and

social work (£269 million), public administration and defence (£157 million), education (£144 million), and wholesale and retail (£156 million). Accommodation and food services (£88 million) also make a notable contribution, reflecting the importance of the visitor economy.

- 14.3.20 The production sector contributes £313 million (18% of total GVA), driven primarily by manufacturing (£198 million) and agriculture, forestry and fishing (£75 million). Construction contributes a further £87 million (5%). Overall, the sectoral profile reflects a service-led economy, with a strong presence of public sector activities and relatively limited contribution from higher value, export-oriented industries.
- 14.3.21 Gross Value Added (GVA) in Powys totalled £2.8 billion in 2023, with the economy dominated by the services sector (£2.0 billion; 74%). Key contributors include real estate (£447 million), human health and social work (£418 million), wholesale and retail (£254 million), public administration (£229 million), and education (£168 million). The production sector contributes £583 million (21%), led by manufacturing (£325 million) and agriculture (£196 million), with construction accounting for a further £136 million (5%)

Productivity

- 14.3.22 Productivity provides an indicator of how efficient an economy is and uses GVA per hour worked as a proxy. These figures are only available at the local authority level.
- 14.3.23 Within Ceredigion GVA per hour worked was £31.10 in 2023, the latest data available, whilst in Powys it is £31.30 (2023). This is below Wales as a whole, at £32.80 (2022) (ONS, 2025).

Deprivation

- 14.3.24 Plate 14-3 below shows relative deprivation in the study area based on the Welsh Index of Multiple Deprivation (WIMD) 2025 (Welsh Government, 2025). Deprivation is presented as a ranked measure for LSOAs across Wales. The WIMD baseline will be used to inform consideration of community sensitivity and potential distributional effects (e.g. where any adverse disruption could disproportionately affect communities with poorer access to services).
- 14.3.25 Analysis indicates that the Lower Super Output Areas (LSOAs) within the study area experience relatively low levels of deprivation overall. The identified areas are all ranked outside of the 20% most deprived areas in Wales, with overall rankings ranging from 544 to 856 (out of 1917). Across the individual domains, income, employment and health indicators are generally strong, while access to services ranks comparatively poorly, reflecting the rural nature of the area. Overall, the data suggests that while there are some

pockets of relative disadvantage, particularly in relation to service accessibility and housing, the study area is not characterised by high levels of socio-economic deprivation.

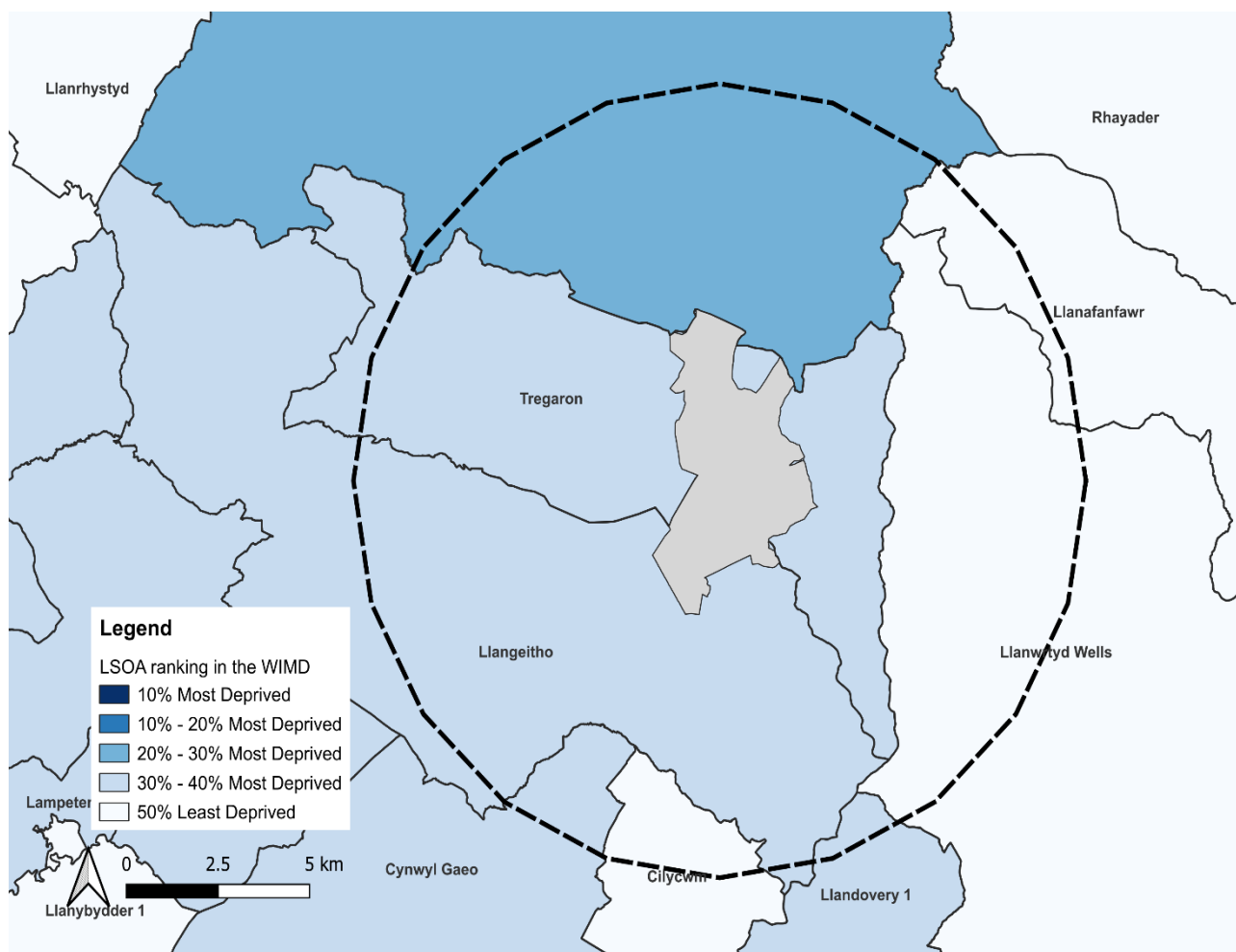


Plate 14-3 - Map of the socio-economic study area showing deprivation at LSOA level. ⁱⁱⁱ

Tourism and Recreation

- 14.3.26 According to the Wales Visitor Economy profile, Wales Tourism accounted for 11.8% of employment in Wales in 2022. (Welsh Government, 2024) South East Wales accounts for the largest volume of tourism industry employment with 44%, whilst Mid Wales (Powys and Ceredigion) accounts for the smallest with 8%. Similarly to employment distribution, the largest share of tourism enterprises in Wales was in the South East (40.7%) and the smallest share was in Mid Wales (10.2%).
- 14.3.27 In Ceredigion, the visitor economy is strongly associated with its coastal settlements, countryside, cultural assets, walking routes and access to the Wales Coast Path. The total economic impact of tourism was estimated at £528 million in 2024, with 2.87 million visitors and an estimated 5,535 jobs supported county-wide. (Ceredigion County Council,

ⁱⁱⁱ Welsh Index of Multiple Deprivation (Welsh Government, 2025)

2025). The county also has an extensive recreation network, including over 2,500 km of Public Rights of Way (PRoW). (Ceredigion County Council, 2026)

- 14.3.28 In Powys, the latest available STEAM data indicates that tourism generated an estimated £1.29 billion of economic impact in 2023, with 4.68 million visitors, 11.76 million visitor days and 12,176 FTE jobs supported by tourism spend. (Powys County Council, 2023). Powys also has a significant public access network, including over 9,250 km of public rights of way (PRoW) and extensive areas of open access land. (Powys County Council, 2024)
- 14.3.29 Within the local study area, the assessment will identify relevant tourism and recreation receptors, including PRoW, promoted routes, visitor attractions, accommodation clusters and businesses that may be sensitive to temporary construction disruption or access changes.

14.4 Embedded mitigation and design assumptions

- 14.4.1 For the purposes of scoping, the following design assumptions and embedded mitigation measures have been applied:
- The Proposed Development represents a significant capital investment, with potential to generate economic benefits through employment and supply chain activity during the development, construction and operational phases.
 - Construction effects will be temporary and managed through standard industry practices, including traffic and site management measures.
 - Access to recreational routes, including PRoW, will be maintained where practicable, with any temporary disruption managed and reinstated following construction and decommissioning.
 - A Community Benefit Fund and/or shared ownership model may be progressed in line with Welsh Government guidance (Welsh Government, 2025). These measures would be described as potential socio-economic benefits/enhancement measures (rather than EIA mitigation), and the assessment will distinguish clearly between mitigation for adverse effects and any voluntary community benefit proposals.
 - Opportunities for recreational enhancement, such as improved access routes and signage, will be explored as part of the Proposed Development.

14.5 Potential Effects

- 14.5.1 The Proposed Development represents a significant capital investment and is expected to generate a range of socio-economic effects across the development, construction, operational, and decommissioning phases. These effects are anticipated to be predominantly beneficial, particularly in relation to employment generation, supply chain expenditure and wider multiplier effects within the local and regional economy.

- 14.5.2 Positive economic effects are likely to arise during the development and construction phases through demand for goods and services, including opportunities for local contractors and supporting businesses. During operation, a smaller number of longer-term employment opportunities are expected, alongside potential benefits associated with training and skills development. Additional economic benefits may also arise through community benefit funding and/or shared ownership arrangements, supporting local initiatives, services and infrastructure.
- 14.5.3 Potential adverse effects are expected to be limited and temporary in nature. These may include disruption to local businesses and recreational users during the construction phase, particularly as a result of construction traffic and any temporary restrictions to access. The assessment will confirm the potential for significant effects once the construction access route(s), programme and specific receptors are defined, applying the significance criteria set out later in this chapter.
- 14.5.4 Evidence from published research indicates that wind farm developments in Wales may have limited influence on tourism, with visitor behaviour often unaffected and only a small proportion of visitors reporting deterrence effects (Regeneris Consulting, 2014). Wider UK evidence also suggests that tourism effects are generally limited. A Scottish study found that 75% of tourists were either positive or neutral about wind farms in the landscape, while other forms of infrastructure, including pylons, mobile phone masts and power stations, attracted higher levels of negative response. The same study found that only 2% of visitors were unlikely to revisit an area because of wind farms, and that the estimated impact on tourism expenditure was less than 2% across the sites reviewed (Glasgow Caledonian University, 2008).
- 14.5.5 For Fferm Wynt Nant y Maen Wind Farm, the assessment will be informed by the local tourism baseline for Ceredigion and Powys (including key visitor attractions and recreation assets) and will consider potential temporary construction disruption and any longer-term changes to visitor experience in combination with the landscape/visual assessment findings, and heritage related assessment findings.
- 14.5.6 Cumulative socio-economic effects may arise in combination with other relevant plans/projects in the surrounding area (including other onshore wind farms, associated grid connection works, and other major construction activities). Potential cumulative pathways include: combined demand for construction labour and services (with implications for local accommodation and supply chain capacity), combined construction traffic disruption affecting communities/businesses/recreation, and combined influences on visitor experience where multiple developments contribute to changes in landscape setting, informed by findings of the LVIA and cumulative landscape assessment. The projects to be included and the assessment approach will be aligned with Chapter 19 Cumulative Effects chapter. Infrastructure forming part of the Proposed Development assessment envelope (including any associated BESS or grid connection works, where applicable) will be assessed as part of the primary assessment rather than cumulatively.

Table 14.1 - Summary of Likely Significant Effects

Summary of Likely Significant Effects		
Receptor	Potential Effects	Scoped In
Construction Phase		
Economy and Employment	Effects from employment generation, supply chain expenditure and multiplier effects, primarily at a regional and national level, with more limited localised benefits	✓
Business	Effects through increased demand for local goods and services, alongside potential temporary disruption to businesses arising from construction activity (e.g. traffic, access restrictions or noise).	✓
Recreation	Temporary disruption to recreational access and use, including PRow and recreational routes, arising from construction activity and associated traffic movements.	✓
Tourism	Potential temporary effects on visitor experience and behaviour arising from construction activity, traffic and associated disturbance. Consideration of visitor perception will be informed by findings from the LVIA, avoiding duplication of detailed visual assessment within the socio-economic chapter.	✓
Operational Phase		
Economy and Employment	Effects associated with operational employment and maintenance activity.	✓
Business	Effects from ongoing operational expenditure and local supply chain activity.	✓
Recreation	No likely significant socio-economic effects on recreation are anticipated during operation, on the basis that no material operational access restrictions or direct disruption to recreational routes are expected. This conclusion will be reviewed with regard to the findings of the LVIA, heritage assessment and any relevant access information available at ES stage.	
Tourism	No likely significant socio-economic effects on tourism are anticipated during operation, based on published evidence on wind farm tourism effects and the absence of a direct operational disruption pathway. This conclusion will be reviewed with regard to the findings of the LVIA, heritage assessment and cumulative landscape assessment, to confirm whether any identified changes in visitor experience could give rise to likely significant socio-economic effects.	
Decommissioning Phase		
Economy and Employment	Effects similar to those at construction stage (although likely to be more limited at this stage)	✓
Business	Effects similar to those at construction stage	✓

	(although likely to be more limited at this stage)	
Recreation	Temporary disruption to recreational access and use associated with decommissioning activity and traffic movements.	✓
Tourism	Potential temporary effects on visitor experience and behaviour associated with decommissioning activity and associated disturbance. Consideration of visitor perception will be informed by findings from the LVIA where relevant.	✓

14.6 Scoping Assessment

14.6.1 Further to the above, Table 14.2 below provides details on the matters to be scoped out of further assessment within the ES.

Table 14.2 - Matters to be scoped out of the assessment

Matters to be scoped out of the assessment	
Matter	Rationale
Operational effects on recreation	Operational recreation effects are proposed to be scoped out of further socio-economic assessment. This conclusion has been reached through a high-level review of the likely operational pathways, including whether the Proposed Development would result in permanent restrictions to PRoW, promoted routes or other recreational assets. At this stage, no material operational access restrictions or direct disruption to recreational routes have been identified once construction is complete. Any landscape, visual or heritage-related amenity considerations will be reviewed, where relevant, with reference to the LVIA, cumulative landscape assessment and heritage assessment findings, but detailed assessment of those matters will not be duplicated within the socio-economic chapter. On this basis, no likely significant socio-economic effects on recreation are anticipated during operation.
Operational effects on tourism	Operational tourism effects are proposed to be scoped out of further socio-economic assessment. This conclusion has been reached through a review of published evidence on wind farm tourism effects, the local tourism baseline, and the likely operational effect pathways. Published evidence indicates that operational onshore wind farms generally have limited influence on visitor behaviour, with only a small proportion of visitors reporting deterrence effects. No direct operational disruption pathway to tourism receptors has been identified at this stage. Any potential longer-term changes to visitor experience associated with landscape setting or heritage context will be reviewed, where relevant, with reference to the LVIA, cumulative landscape assessment and heritage assessment findings. On this basis, no likely significant socio-economic effects on tourism are anticipated during operation.

14.7 Proposed Assessment Methodology

- 14.7.1 To assess the socio-economic effects of the Proposed Development, a desk-based assessment will be undertaken drawing on published Welsh and local datasets and relevant evidence from comparable onshore wind projects. Where appropriate, the assessment will also be informed by targeted engagement with relevant stakeholders (e.g. local authority economic development/tourism officers and local community representatives) to ensure the baseline and receptor understanding reflect local conditions and to validate key assumptions used in any quantitative modelling.
- 14.7.2 The impact assessment will include a review of baseline indicators for the local study area (wards within approximately 10 km of the Proposed Development) and for the relevant local authority areas (Ceredigion and Powys), supplemented by national context where required. This will support an appraisal of the socio-economic policy context at local, regional and national level. Where a quantitative model is applied, the assessment will clearly set out model inputs (e.g. estimated construction and operational spend, employment assumptions), scenarios (including alternative local/Wales/UK retention rates), and assumptions on displacement and leakage.
- 14.7.3 There is no single prescribed UK-wide methodology for determining the significance of socio-economic effects; therefore, this assessment will apply a transparent and proportionate approach that defines receptor sensitivity and effect magnitude, consistent with the overarching EIA approach set out in Chapter 4 (Approach to EIA). Sensitivity will reflect factors such as receptor vulnerability/resilience and reliance on affected resources (e.g. tourism trade, recreation access), while magnitude will reflect scale, duration, frequency and geographic extent of the effect.
- 14.7.4 Sensitivity will vary depending on receptor type and will be defined separately for socio-economic, tourism and recreation receptors. For economic and employment receptors, sensitivity will reflect factors such as labour market conditions, local economic resilience and supply chain capacity. For tourism and recreation receptors, sensitivity will reflect the importance and use of affected visitor assets, recreational routes and access networks, the availability of alternatives, and, where relevant, their relationship with landscape setting or heritage context.
- 14.7.5 Magnitude will also be assessed in a receptor-specific way. For economic and employment effects, this will consider the scale, duration and geographic distribution of employment, expenditure and GVA effects. For tourism and recreation effects, it will consider the scale and duration of any disruption, the extent of affected routes or visitor assets, and any relevant findings from the LVIA, cumulative landscape assessment or heritage assessment. The significance of effects will be determined by considering sensitivity and magnitude together, with reference to the criteria set out below and the overarching EIA methodology.

Table 14.3 – Magnitude Criteria

Magnitude	Definition
Major	A substantial change to socio-economic loss or gain in the area of impact affecting a large number of people (100+) and/or businesses (30+) to the extent of changing the business and employment structure. For tourism and recreation receptors, this may include long-term or widespread disruption to key visitor assets, recreational routes or access networks, or changes likely to materially affect visitor behaviour or recreational use.
Moderate	A partial change to socio-economic loss or gain in the area of impact affecting a sizeable number of people (20-100) and/or businesses (10-30) to the extent of adjusting business operations and employment. For tourism and recreation receptors, this may include temporary or localised disruption to visitor assets or recreational routes where alternatives are limited, or where user experience may be materially affected.
Minor	A small change to socio-economic loss or gain in the area of impact affecting a group of people (<20) and/or businesses (<10) to the extent of influencing business activities and employment opportunities. For tourism and recreation receptors, this may include short-term, localised or low-level disruption where alternative routes or attractions are available and wider visitor or recreational behaviour is unlikely to be materially affected.
Negligible	No change to socio-economic loss or gain in the area of impact affecting no people and/or businesses permanently and very few people (<10) and/or businesses (<5) temporarily (for less than 1 year).

- 14.7.6 The economic model will assess the impact of the Proposed Development across a small set of clearly defined scenarios. These will include, as a minimum: (i) alternative assumptions on the geographic retention of spend and employment (local area / Wales / UK), (ii) alternative construction programme assumptions where this could affect local accommodation and service demand, and (iii) sensitivity testing for key parameters that materially influence employment and GVA outputs. The assessment will clearly document the assumptions and the evidence base used to justify them.
- 14.7.7 The assessment of tourism and recreation will be informed by a local baseline that identifies key recreational assets and routes (including PRoW and any promoted trails) and the main tourism receptors within the study area (e.g. visitor attractions and accommodation clusters). Effects will consider both temporary construction-related

disruption (including changes to access and the visitor journey) and any potential longer-term influence on visitor experience, drawing on evidence from published research and the Proposed Development's landscape and visual assessment, and heritage assessment outputs.

- 14.7.8 Where potential adverse effects are identified, the assessment will consider appropriate mitigation measures, such as access management, clear construction-phase communication, temporary diversion arrangements and measures to minimise disruption to recreational users and visitors. Opportunities for enhancement, including improved information, signage or access improvements, will also be considered where relevant and proportionate.

14.8 Summary of Scoping position

- 14.8.1 Socio-economic impacts associated with onshore wind developments in Wales and the UK are typically positive, arising from employment generation, supply chain expenditure and wider multiplier effects. These benefits are most pronounced during the construction phase, with more limited effects during operation and decommissioning.
- 14.8.2 Potential adverse effects are generally limited and temporary in nature, typically relating to minor disruption to local businesses, residents and recreational users during construction. Evidence from existing literature indicates that wind farm developments have negligible effects on tourism and recreation, with visitor behaviour largely unaffected. (Regeneris Consulting, 2014, Glasgow Caledonian University, 2008)
- 14.8.3 Based on the baseline evidence and the high-level appraisal undertaken at this stage, significant socio-economic adverse effects are not currently anticipated. However, there is potential for significant beneficial socio-economic effects, particularly in relation to employment generation, supply chain expenditure and wider multiplier effects during the construction phase. Socio-economics has been scoped into the EIA to enable a proportionate assessment of both potential adverse and beneficial effects (including employment, supply chain, tourism and recreation) and to respond to consultee feedback. The assessment will confirm the significance of effects once the construction access strategy, programme and key receptors are defined.

14.9 Reference List

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