

Parc Solar Caenewydd, Swansea

Draft Economic Benefits Statement

Development of National Significance in the Renewable Energy Sector
Full Re-Consultation before Applying for Planning Permission





Document Management.

Version	Date	Author	Checked/ Approved by:	Reason for revision
1	22/11/22	NR	RC	-
2	05/12/22	NR	RC	Updated analysis to reflect new data
3	20/01/2023	NR	RC	Client feedback
4	15/03/2023	NR	RC	Client feedback
5	30/03/2023	NR	RC	Client feedback
6	05/04/2023	NR	RC	Client feedback
7	16/05/2023	NR	RC	Legal review
8	26/09/2023	NR	RC	Internal review
9	04/10/2023	AH	RC	Change to scheme
10	09/10/2023	AH	RC	Change to scheme



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Executive Summary

Pegasus Group has been appointed by Taiyo Power & Storage Ltd to undertake economic benefits analysis for a proposed Non-EIA 44MW solar power and battery storage facility with associated development including battery storage facility, cable trench and connection infrastructure on land fronting the A484 and Swansea Road (B4560) at Gowerton, Swansea.

Main Findings

Construction Impacts

The build phase of the Proposed Development is estimated to generate the following impacts:

- **Direct and indirect construction-related employment:** The Proposed Development will support an estimated 163 temporary roles on-site and in the wider economy over the nine-month build programme.
- **Contribution of construction phase to economic output:** An estimated £7.2million of gross value added (GVA) could be generated during the nine-month construction period.

The Proposed Development is expected to have a 40-year operational lifespan, at which point it will be decommissioned. Similar economic benefits to those outlined above are expected to be generated by the decommissioning phase.

Operational Impacts

- **Permanent employment:** It is estimated that the Proposed Development will support up to five full-time equivalent jobs (FTE) in Swansea and the wider economy once it is operational.
- **Contribution to economic output:** The gross value associated with the five FTEs is estimated to be £5.77million (present value) over the 40-year operational life span.
- **Business rates:** Business rates generated by the solar project element of the Proposed Development could be in the region of £157,000 per annum.
- **Supporting economic development objectives:** The Proposed Development will support the Welsh Government's pledge to become net zero and the COP27 aim of reducing carbon emissions and increasing generation of clean energy. At the regional scale, it will support South West Wales regional economic objectives in respect of investment in renewable energy and generating benefits across the wider economy and society.
- **Public attitudes towards renewable energy:** According to a report by the Department for Energy Security and Net Zero, 85% of the UK public supported renewable energy in spring 2023. This went up to 88% when looking at public support for solar energy, which was the highest public support for any source of renewable energy.

1. Introduction

Scope and Purpose

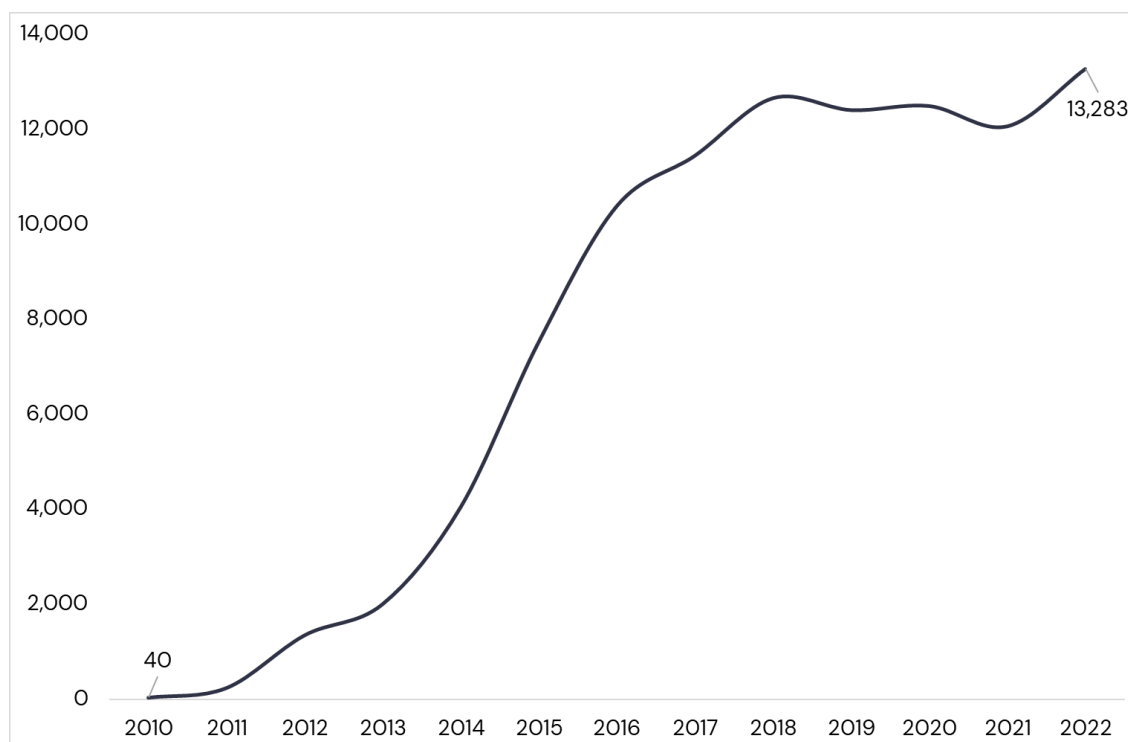
- 1.1. Pegasus Group has been appointed by Taiyo Power & Storage Ltd (herein referred to as “the Applicant”) to undertake economic benefits analysis for a proposed Non-EIA¹ 44MW solar power and battery storage facility with associated development including battery storage facility, cable trench and connection infrastructure on land fronting the A484 and Swansea Road (B4560) at Gowerton, Swansea. It will deliver a host of landscape, biodiversity, soil and hydrological enhancements. Including measures to strengthen habitat connectivity through this part of the valley, the creation of green buffer zones and public right of ways improvements. The Proposed Development is called ‘Parc Solar Caenewydd’.
- 1.2. This draft economic benefits statement is being published to accompany a second phase of statutory pre-application consultation carried out under Articles 8 and 9 of the Development of National Significance (Procedure) (Wales) Order 2016. The first phase of statutory consultation was carried out between June and August 2023. The applicant is now undertaking a full re-consultation in light of the changes introduced to the planning application boundary and development description.
- 1.3. The draft statement considers the socio-economic impacts that could be created by the Proposed Development in terms of the construction phase and once it is operational.

Supporting a Growth Sector

- 1.4. Data from the Digest of United Kingdom Energy Statistics (DUKES) show that in the UK over the past 12 years, the amount of energy generated by solar PV has increased significantly. In 2010, only 40 GWh of solar PV energy was generated, however, by 2022 the figure had reached 13,283 GWh. **Figure 1.1** shows this increase in more detail for the UK as a whole.

¹ On 17 August 2022, Planning & Environmental Decision Wales adopted its Environmental Impact Assessment (EIA) Screening Direction. The Welsh Ministers direct that the Proposed Development is not EIA development within the meaning of the Regulations.

Figure 1.1: Energy generated from solar PV (GWh) in the UK, 2010–2022



Source: Digest of United Kingdom Energy Statistics (DUKES)

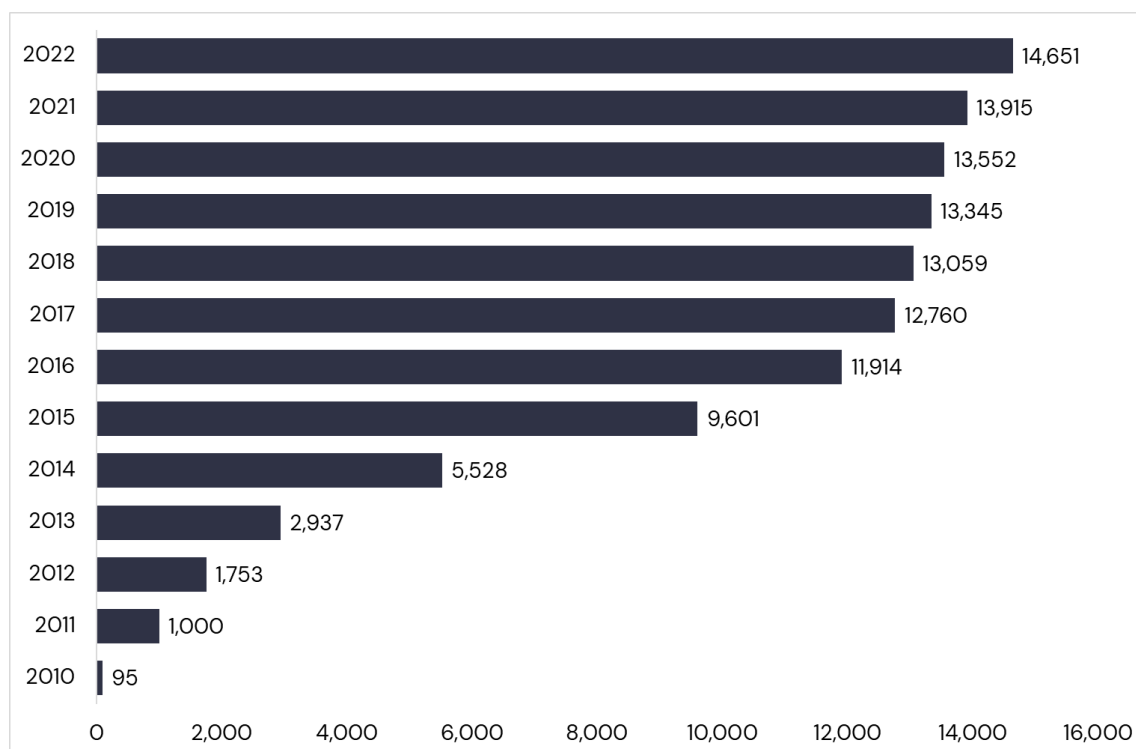
- 1.5. In 2010 the installed capacity of solar PV was 95 MW. This increased to 1,000 MW by 2011 and rapidly over subsequent years until plateauing in 2017/18. The most recent data for 2022 show the cumulative installed capacity of solar PV in the UK is 14,651 MW (see **Figure 1.2**).
- 1.6. In the Welsh Government's report published in May 2022, *Energy Generation in Wales*², there is a focus on the target that by 2030, 70% of electricity demand in Wales will be from renewable sources. In January 2023 this target was reviewed³, with the new target being for Wales to generate the equivalent of their total annual electricity demand from renewable sourced by 2030. However, in 2020, 65MW of new renewable capacity was commissioned which was the lowest annual deployment since 2010. A report on renewable energy in Wales published by The House of Commons Welsh Affairs Committee in July 2021⁴ states that Wales harnesses energy from a diverse range of renewable energy sources, however, only 26.9% of Wales' energy generation in 2019 came from renewable sources. Therefore, to meet the 2030 target, new renewable capacity needs to be commissioned.

² *Energy Generation in Wales*: Welsh Government, May 2022.

³ Review of Wales' Renewable Energy Targets: Welsh Government, January 2023.

⁴ Available here: <https://publications.parliament.uk/pa/cm5802/cmselect/cmwelaf/439/43904.htm>

Figure 1.2: Cumulative Installed Solar PV Capacity (MW) in the UK



Source: UK renewable electricity capacity, Department for Business, Energy & Industrial Strategy

Report Structure

1.7. The remainder of the report is structured as follows:

- **Section 2 – Socio-Economic Overview**, looks at the character of the Swansea economy, in comparison to Wales and Great Britain. It presents information on employment trends, business numbers and the claimant count. The section also looks economic development objectives that are relevant to the Proposed Development.
- **Section 3 – Construction Phase Benefits**, sets out the construction phase benefits of the Proposed Development, focusing on its contribution to employment and economic output.
- **Section 4 – Benefits created once the Proposed Development is operational**, sets out the number of jobs that the Proposed Development will create once fully developed and presents the assessment of the contribution of the Proposed Development to economic output, measured in terms of gross value added (GVA).
- **Section 5 – Summary**, highlights the key economic benefits that will be generated during the construction and operational phases of the Proposed Development in the context of the Swansea economy.

2. Socio-Economic Overview

Introduction

2.1. This section presents a profile of the Swansea economy, alongside Wales and Great Britain comparators where appropriate. It examines the following topics:

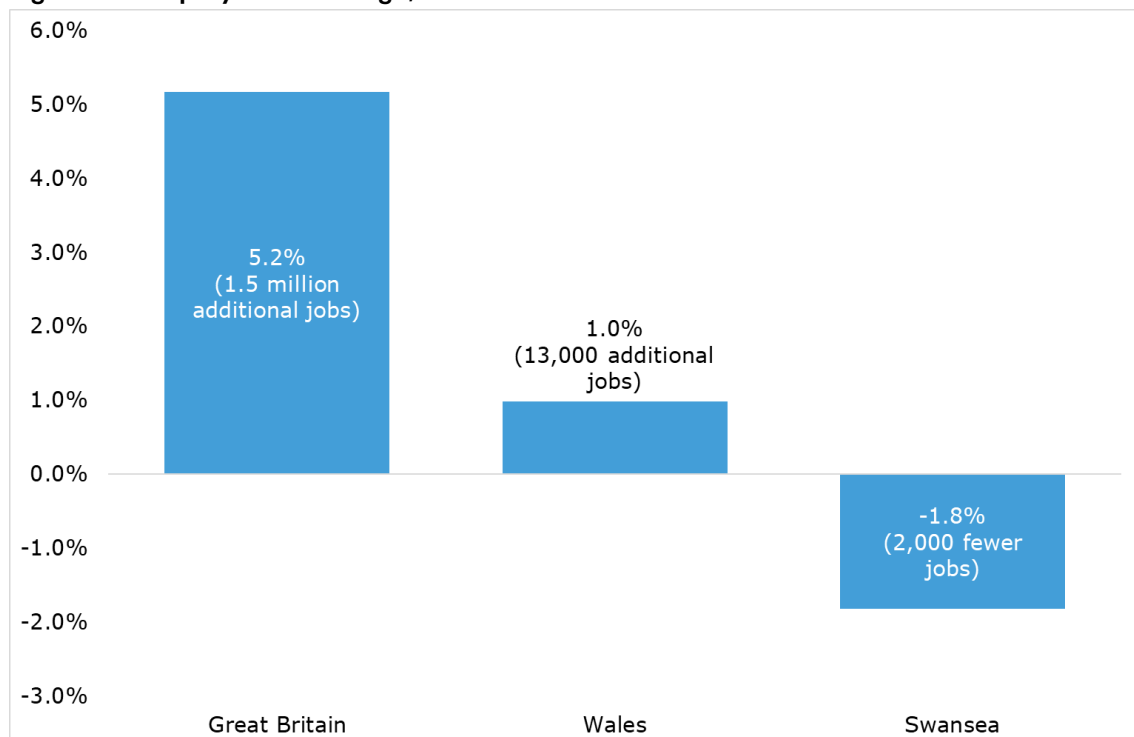
- Employment – change over time and key sectors.
- Business numbers – change over time.
- The claimant count.

Employment

2.2. Based on the most recent data from the Business Register & Employment Survey (BRES) published by the Office for National Statistics (ONS), in 2021 around 108,000 people – including the self-employed – worked in Swansea.

2.3. Employment numbers in Swansea decreased by 1.8% (2,000 fewer jobs) between 2015 and 2021. In comparison both Wales and Great Britain saw jobs growth over the same timeframe of 1% (13,000 additional jobs) and 5.2% (1.5 million additional jobs) respectively. See **Figure 2.1** for a graphical representation of this data.

Figure 2.1: Employment Change, 2015–2021

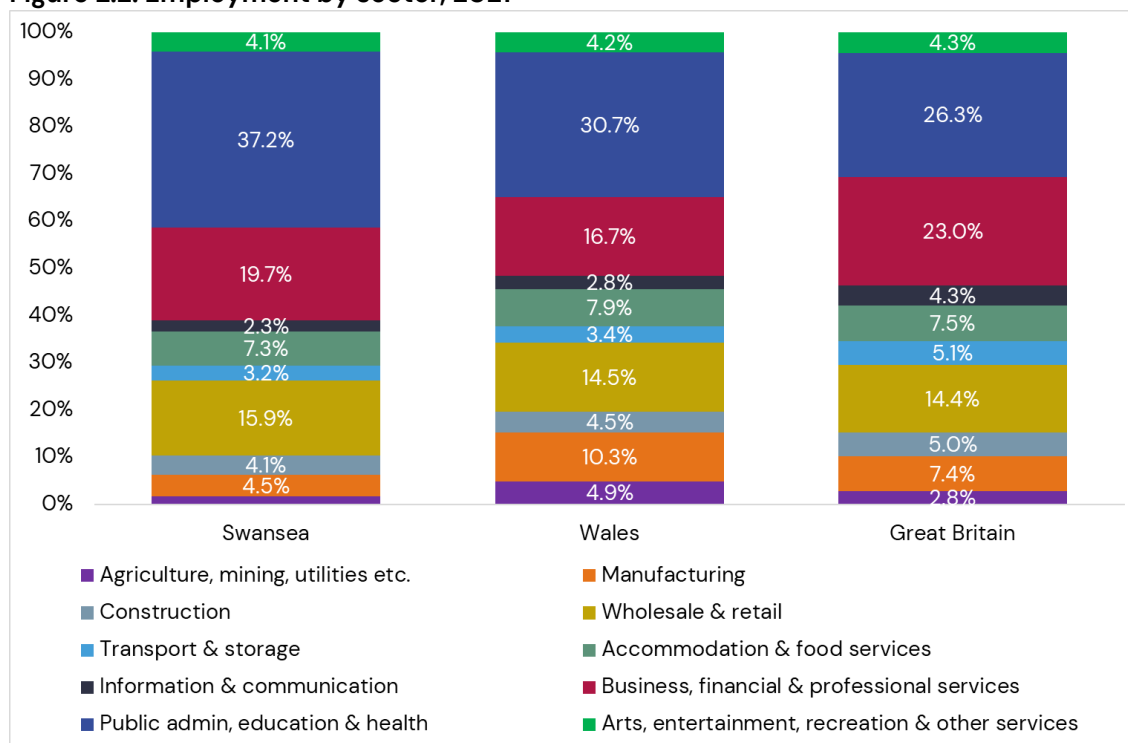


Source: ONS, Business Register & Employment Survey

2.4. The Proposed Development will create new jobs in Swansea, contributing to the recovery of the labour market and boosting economic growth.

- 2.5. The largest employment sector in Swansea is the public administration, education and health services sector, which accounts for 37.2% of total employment in the area and supported an estimated 41,000 jobs in 2021 (see **Figure 2.2**).
- 2.6. The second biggest sector in Swansea is business, financial and professional services which accounted for around 21,750 jobs and 19.7% of total employment in 2021. The construction sector, which is likely to see employment created during the Proposed Development's build phase, supports around 4,500 jobs in Swansea and accounts for 4.2% of total employment.

Figure 2.2: Employment by sector, 2021



Source: ONS, Business Register & Employment Survey

Business Count

- 2.7. Table 2.1 shows the growth in businesses between 2013 and 2023 in Swansea, Wales and Great Britain. In this time, the number of businesses in Swansea grew by 19%, an absolute change of 1,340 businesses. This was above the growth rate seen in Wales (17% – 18,800 new businesses), however, it was below the growth seen in the whole of Great Britain (21.2% – 539,010 new businesses).

Table 2.1: Change in business numbers, 2013–23

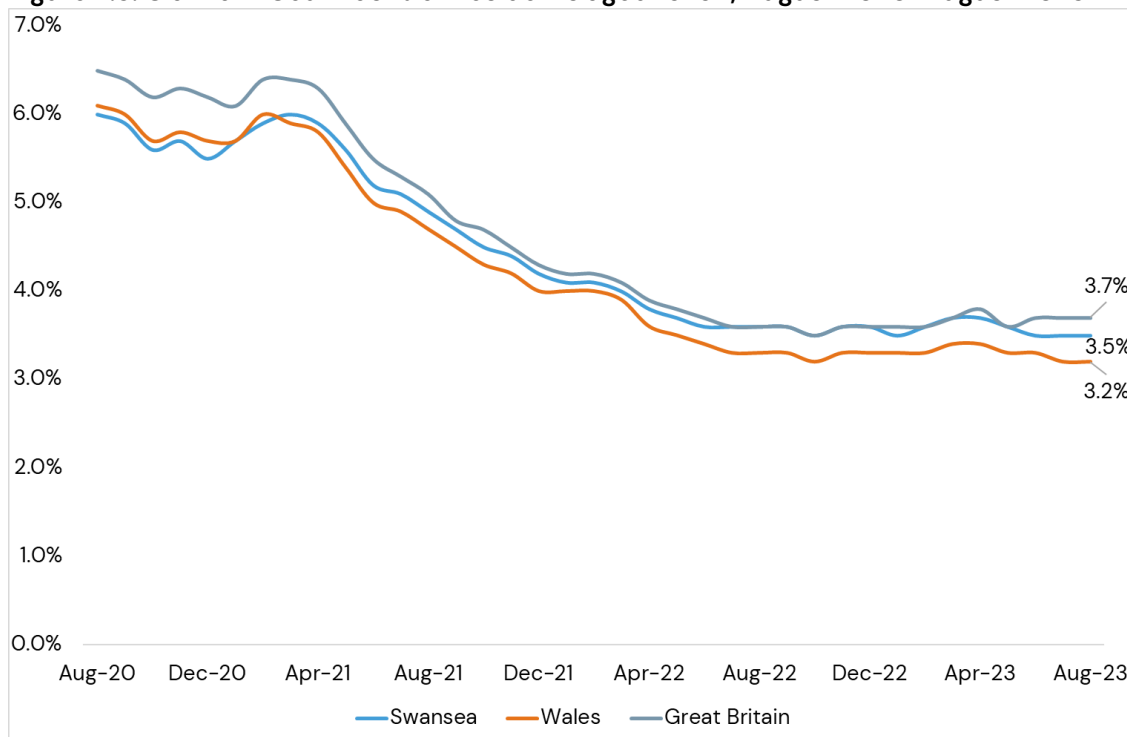
	2013	2023	Absolute Change	% Change
Swansea	7,060	8,400	1,340	19.0%
Wales	110,510	129,310	18,800	17.0%
Great Britain	2,543,115	3,082,125	539,010	21.2%

Source: ONS, UK Business Count

Claimant Count

- 2.8. The claimant count records the number of people claiming Jobseeker's Allowance plus those who claim Universal Credit and are required to seek work and be available for work.
- 2.9. Figure 2.3 shows the claimant count as a proportion of those aged 16–64 in Swansea, Wales and Great Britain for every month from August 2020–August 2023. The count is relatively high between August 2020 and April 2021, which is likely to be a direct result of the Covid-19 pandemic at the time.
- 2.10. In August 2020, the claimant count in Swansea was 6% and by August 2023 it fallen to 3.5%. This represents an absolute decrease of 4,190 fewer people claiming benefits. The claimant count in Swansea is currently above the rate seen in Wales (3.2%) and is below the rate seen in Great Britain (3.7%). With uncertainty remaining about the UK's growth prospects, it is important that new job opportunities are created to support economic growth.

Figure 2.3: Claimant Count as % of Residents aged 16–64, August 2020–August 2023



Source: ONS, Claimant Count

Economic Development Objectives

- 2.11. The *Wales Prosperity for All: economic action plan* was published in 2019⁵ by the Welsh Government. It sets out how resources, expertise and knowledge available within Wales can

⁵ *Prosperity for All: economic action plan*, Welsh Government, 2019. Available at: [Regional Investment in Wales After Brexit \(gov.wales\)](#).

be combined to strengthen the economic foundations and future proof the Welsh economy.

- 2.12. The plan indicates that the challenges faced fall into three broad categories: entrenched, long term and structural challenges; strategic challenges; and financial challenges. These challenges are considered in the context of the characteristics of the economy and associated factors to help formulate the forward plan. The key characteristics presented are the presence of a productivity gap between Wales and the rest of the UK, economic inactivity and demographic shift, spatial variations within Wales, automation, artificial intelligence, digitalisation innovation and skills, and decarbonisation and climate change.
- 2.13. The plan is shaped by four key principles:
- Public investment with a social purpose.
 - Simplification.
 - A stronger regional voice.
 - A focus on the long-term.
- 2.14. The plan presents the use of an Economic Contract which will drive public investment with a social purpose through delivering added and wider value from the business support offered throughout the country. A number of well-being objectives are proposed and act as the framework around which the plan is structured, including:
1. Support people and businesses to drive prosperity.
 2. Tackle regional inequality and promote fair work.
 3. Drive sustainable growth and combat climate change.
 4. Build ambition and encourage learning for life.
 5. Equip everyone with the right skills for a changing world.
 6. Deliver modern and connected infrastructure.
 7. Promote and protect Wales' place in the world.
- 2.15. The Welsh Government has an *All Wales Plan for 2021-2025*, which outlines how all of Wales will work together to achieve net zero. The Plan sets out pledges that Wales will make to target seven areas where action is needed. These areas are:
1. Commitment to net zero or action on climate emergency.
 2. Understanding and reducing carbon footprint.
 3. Education, Engagement and capacity building.
 4. Energy and reducing energy demand.
 5. Homes and housing.

6. Circular economy and waste.
 7. Enriching our natural resources.
-
- 2.16. The Plan sets out pledges from individuals in Wales to businesses and the government. The main point of action in order to reach net zero is to drastically reduce carbon emissions across all sectors. One way to do this is through the increased use of renewable energy sources to displace CO₂ emissions from fossil fuel sources, which the proposed scheme will deliver.
 - 2.17. A report by the Welsh Government published in 2018, *'Energy Generation in Wales'*, looks at the current energy generation in Wales and how it has changed over time to support in the making of Welsh energy policy. In January 2023, the Welsh Government set the target of having renewable energy sources generating electricity equal to 100% of electricity demand in Wales by 2030. To achieve this, further renewable projects need to be developed such as the Proposed Development.
 - 2.18. A Policy Statement by the Welsh Government in 2020 looks at local ownership of energy generation in Wales⁶. The government want to ensure renewable energy projects in Wales have maximum benefit to the Welsh people through local ownership, shared ownership and community ownership. The Policy Statement sets three targets for energy generation in Wales which are outlined below:
 1. Wales to generate electricity equal to 70% of its consumption from renewable sources by 2030. However, in January 2023, this target was reviewed to 100% of Wales' electricity demand to be from renewable sources by 2030.
 2. 1 gigawatt (GW) of renewable electricity and heat capacity in Wales to be locally owned by 2030.
 3. New renewable energy projects to have at least an element of local ownership from 2020.
 - 2.19. The Proposed Development will offer shared ownership of Parc Solar Caenewydd which will help towards the Welsh Government's target to increase local ownership of renewable energy projects and ensure new renewable energy developments benefit local people.
 - 2.20. A report published by the Welsh government in December 2021 looks at policy and strategy recommendations to significantly scale up renewable energy in Wales⁷. It outlines that the vision for Wales is 'to generate renewable energy to at least fully meet our energy needs and utilise surplus generation to tackle the nature and climate emergencies'. The report also looks to calling on Ofgem to develop a Welsh regulatory derogation to enable energy business model innovation. This would involve accelerating the scale-up of renewable energy in Wales and realising the benefits and wider co-benefits of renewable energy, such as those associated with the Proposed Development.

⁶ *Local ownership of energy generation in Wales – benefitting Wales today and for future generations*: Welsh Government, February 2020.

⁷ *Renewable energy deep dive: recommendations*: Welsh Government, December 2021.

- 2.21. The *South West Wales Regional Economic Delivery Plan* was published in September 2021⁸. It covers Swansea, as well as Carmarthenshire, Neath Port Talbot, and Pembrokeshire. The Plan aims to build on an earlier major study that identified the regional strengths and opportunities. This included its green energy potential, strong cultural identity, stunning scenery, quality of life and well-established links between universities and industry. There are three ambitions and three missions set out in the Plan. The ambitions are:
1. Resilient and sustainable.
 2. Enterprising and ambitious.
 3. Balanced and inclusive.
- 2.22. The missions are:
1. Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy.
 2. Building a strong, resilient and 'embedded' business base.
 3. Growing and sustaining the 'experience' offer.
- 2.23. There is commitment made under mission one to take forward the region's major energy-related projects and driving associated benefits through the regional, via (but not limited to) industrial decarbonisation, supply chain opportunities, and university-linked innovation.
- 2.24. *Future Wales: The National Plan 2040*⁹ is the new spatial strategy for Wales that was published in February 2021. The Plan is a national development framework that sets the direction for development in Wales up to 2040. It seeks to address key national priorities such as the planning system, including sustaining and developing a vibrant economy, achieving decarbonisation and climate-resilience, developing strong ecosystems and improving the health and wellbeing of communities.
- 2.25. The Future Wales Plan has 11 outcomes, including demanding urgent action on carbon emissions and the planning system must help Wales lead the way in promoting and delivering a competitive, sustainable, decarbonised economy. This will focus on decarbonisation commitments and renewable energy targets as opportunities to build a more resilient, equitable, low-carbon economy. There will also be a focus on developing clean and efficient transport infrastructure, improve public health and generate skilled jobs in new sectors. New homes will also be energy efficient and adapt to the changing climate.
- 2.26. Policy 17 of the Future Wales Plan looks at renewable and low carbon energy and associated infrastructure and states that there must be significant weight given to the need to meet Wales' international commitments and the target that by 2030, 70% of consumed electricity will be renewable in order to combat the climate emergency. Wales has many opportunities to generate renewable energy, and the government is committed to

⁸ *South West Wales Regional Economic Delivery Plan*, September 2021. Available at: [South West Wales Regional Economic Delivery Plan - Swansea](#).

⁹ *Future Wales - The National Plan 2040*: Welsh Government, February 2021.

delivering renewable energy, including in Swansea which is one of the targeted areas of growth South West Wales.

- 2.27. In February 2023, the Welsh Government provided their response to the Roads Review which provided advice on current road projects and how to consider future projects. The Roads Review was produced following concerns that some road investment in Wales were no longer consistent with Welsh Government's policies, in particular the declaration of a climate and nature emergency. The increased capacity for cars on Welsh road networks has led to increased reliance on private cars, resulting in urban sprawling and increased congestion which as well as an economic impact, also causes social and environmental problems.
- 2.28. In their response to the Roads Review, the Welsh Government state that all new roads will need to contribute to a modal shift to tackle climate change and reduce congestion on the road network for freight. This may mean some current schemes may need to be reviewed which could lead to a reduction in employment in these sectors. Therefore, it is increasingly important that green jobs are created in the renewable energy sector which will contribute to the Welsh Government's policies to tackle the climate and nature emergency.
- 2.29. In November 2022, world leaders met at the United Nations Climate Change Conference, also known as COP27. The three main areas that were to be discussed at the conference were reducing emissions, helping countries prepare for and deal with climate change and securing technical support and funding for developing countries suffering from the effects of climate change¹⁰. There was a continued target to maintain the earth's temperature rise to 1.5 degrees, and the COP27 agreement places focus on the energy crisis and recognises the need to generate more secure, reliable and clean energy in the effort to reach net zero by 2050¹¹.

¹⁰ What is Cop27 and why is it important: BBC News, November 2022. Available here: <https://www.bbc.co.uk/news/science-environment-63316362>

¹¹ First Draft of Cop27 text: what it says and what it means: The Guardian, November 2022. Available here: <https://www.theguardian.com/environment/ng-interactive/2022/nov/17/first-draft-of-cop27-text-what-it-says-and-what-it-means>

3. Construction Phase Benefits

Supporting Construction Employment

- 3.1. Solar projects create opportunities for local businesses through the supply chain, including aggregates suppliers, security and monitoring during operation, farming and landscaping contractors and other aspects of the construction process, such as fencing.
- 3.2. Based on information provided by the Applicant, there will be a minimum of 30 core workers on-site during the construction phase. During peak times of construction there will be between 60 and 80 construction workers on-site. A mid-point of 70 on-site construction workers has been used for the purpose of the analysis. The construction period is expected to be around nine months.
- 3.3. The direct jobs on-site will support further employment via the “multiplier effect”, which measures further economic activity (jobs, expenditure or income) associated with additional local income and local supplier purchases. Research published in 2014 by the Centre for Economic & Business Research (CEBR) on solar powered growth in the UK gives an employment multiplier for large-scale solar PV investments of 2.33 – i.e. for every single job supported on-site, 1.33 indirect/induced jobs are supported in the wider economy. Applying this multiplier to the maximum 70 on-site jobs, the Proposed Development could support up to 93 additional temporary jobs in the wider economy during peak times of the nine-month build phase¹².
- 3.4. In total, the Proposed Development could support up to 163 temporary jobs¹³, both direct jobs on-site and indirect/induced roles in the wider economy, during the nine-month construction period. A similar number of jobs are expected to be supported as part of the decommissioning process after 40 years when the Proposed Development comes to the end of its lifespan.

Gross value added

- 3.5. The contribution of the site to economic output has been calculated by taking the maximum 70 on-site jobs associated with the Proposed Development and multiplying this by an estimate of average levels of gross value added (GVA) per construction employee in Wales. Based on data sourced from ONS for 2021, GVA per construction employee in Wales is around £68,817 per annum.
- 3.6. The 93 indirect/induced jobs have been multiplied by the average GVA per job for all sectors in Wales. Based on 2021 ONS data, annual GVA per job across all sector was approximately £52,060.

¹² A multiplier of 2.33 gives all jobs, both direct and indirect. To split out these two job types, the figure of 1.33 has been used because this gives just indirect employment.

¹³ This figure relates to total jobs. It is not possible to calculate an FTE figure as total jobs will likely contain a mix of full-time and part-time roles.

- 3.7. Based on the figures above, it is estimated that during the nine-month construction of the Proposed Development, the GVA associated with the 163 temporary jobs supported on-site and in the wider economy could be up to £7.2million in current prices.

Construction Spend in the Local Area

- 3.8. The Proposed Development is committed to providing local supply chain opportunities during the construction phase on areas such as fencing and road infrastructure. Assuming at least 30% of the jobs are taken by local people, the remaining 70% will be taken by people outside of the local area. These workers are likely to stay in the local area during construction and will spend money on accommodation and food and drink. It is therefore possible to estimate how much the construction workers will spend in the local area, thus supporting local businesses.
- 3.9. The build phase is expected to last nine months and 49 jobs supported on-site at the peak of the programme could be taken by workers from outside of Swansea (70% of the overall maximum of 70 on-site jobs). Workers from outside the area will be staying in hotels, B&B's, rented dwellings etc. during the build phase. They will also be spending money in shops, bars, restaurants, etc.
- 3.10. Based on a scenario that for month one 21 workers will be on-site, for month two there will be 30 workers on-site, for month three there will be 35 workers on site, for months four to six there will be 49 workers on-site and for months seven, eight and nine this will go back down to 35, 30 and 21 workers respectively. Assuming each worker spends around £75 per day¹⁴ on accommodation, food and drink etc. and there are 21.75 working days in a month, it is estimated that during the nine-month construction phase, construction employees from outside the local area could spend around £0.5million at local businesses. This will help support the 1,760 accommodation, food & drink and retail businesses that operate within Swansea¹⁵.

Decommissioning Phase

- 3.11. The benefits outlined above all relate to the build phase of the Proposed Development. It is important to note that the decommissioning phase of the Proposed Development is likely to generate similar economic benefits for Swansea and the wider economy.

¹⁴ This is an indicative estimate.

¹⁵ Based on data from the Office for National Statistics 2023 UK Business Count.

4. Operational Phase Benefits

Introduction

- 4.1. This section outlines the impact of the proposed scheme once operational, in terms of supporting permanent employment and economic output in Swansea and the wider region. It also provides estimates on the business rates generated by the Proposed Development on an annual basis. In addition, a summary of how the Proposed Development will support local and sub-regional economic development objectives is provided. Reference is also made to the Welsh Government's objectives on the wider climate change agenda.

Employment

- 4.2. Based on Pegasus Group's past experience of assessments for solar farms it is estimated that up to five full-time equivalent (FTE) jobs will be supported by the Proposed Development in Swansea and the wider economy. This is likely to include roles in electrical engineering, site security, land management and other minor maintenance operations. The site of the Proposed Development is currently used for farming. This issue is discussed in the Agricultural Circumstances report produced by Kernon Countryside Consultants as part of the application.

Gross value added

- 4.3. The contribution of the Proposed Development to economic output has been calculated by taking the job creation associated with the Proposed Development and multiplying this by an estimate of average levels of GVA per employee in the Wales (around £52,060 in 2021, based on ONS data). It is estimated that once operational and fully occupied, GVA associated with the five FTE jobs will be around £260,000 per annum.
- 4.4. Looking at the economic output contribution over the 40-year operational lifespan of the project, the GVA associated with the five FTE jobs is estimated to be £5.77million (present value)¹⁶.

Business rates

- 4.5. Business rates are an important economic contributor to an area. It is estimated that the solar project element of the Proposed Development could generate approximately £157,000 per annum in business rates. Over the intended 40-year lifespan of the Proposed Development, business rates generated could total around £3.5million (present value).

Potential impacts on tourism

- 4.6. The impact of renewable energy schemes is sometimes highlighted by local residents and businesses as a concern when considering a proposed development, for example raising concerns around traffic disruption and the impact on tourism.

¹⁶ Where future benefits are calculated over the operational timeframe, they have been discounted to produce a present value. This is the discounted value of a stream of either future costs or benefits. A standard discount rate is used to convert all costs and benefits to present values. Using the Treasury's Green Book, the recommended discount rate is 3.5% up to 30 years, after 30 years the discount rate is 3%.

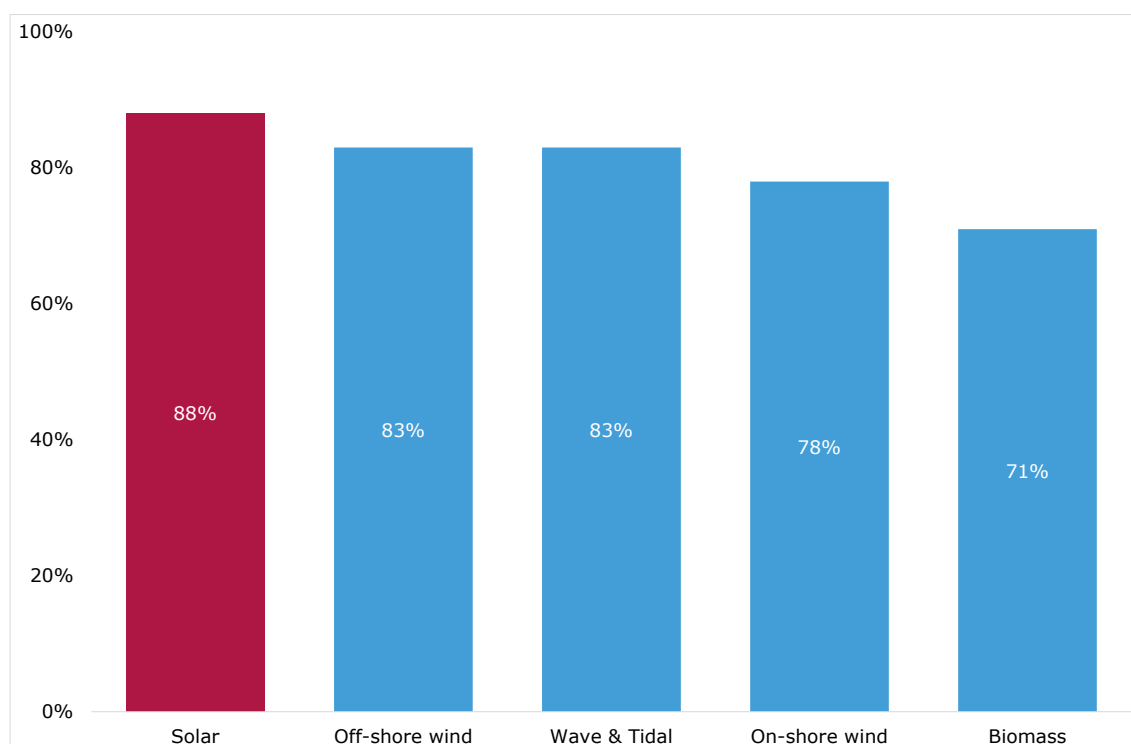
- 4.7. Based on data from the ONS BRES, in Swansea there are around 12,500 jobs supported by accommodation and food services and the arts, entertainment, recreation and other services sectors as of 2021. Tourism therefore plays an important role in supporting the local economy. When considering any potential impact the Proposed Development could have on the sector, it is helpful to look at work undertaken elsewhere on any impacts that renewable energy schemes can have on tourism.
- 4.8. In 2013, a survey of 1,000 holidaymakers in Cornwall explored the extent to which solar and wind farms impact on whether people would visit the area. The survey was commissioned by Good Energy, a renewable energy supplier, and carried out during the peak holiday month of August. The main findings to emerge from the research were that¹⁷:
- More than nine out of ten (94%) respondents said the presence of solar and wind farms would make no difference to their decision to visit Cornwall again.
 - Poor weather (17%) and the cost of holidaying (14%) were the largest deterrents to holidaymakers, with only 2% of those surveyed citing the presence of solar and wind farms as a reason to be less likely to visit Cornwall.
 - Only 7% of those surveyed said that the presence of solar farms had a negative impact on their visit.
- 4.9. In another study published in 2014, Regeneris Consulting and The Tourism Company looked at the potential economic impact of onshore wind farms and associated grid infrastructure on the Welsh Tourism Sector. Findings from the study include:
- Wind farms have been an established presence on the local landscape in areas such as Powys, Anglesey and the South Wales Valleys. Case study analysis of these areas (including consultation with local tourism trade associations and local authority tourism officers) reveals little evidence of significant impacts on tourism. The majority of consultees believed there had been no impact on overall visitor numbers.
 - While visitor responses and reactions to wind farms are highly subjective, the evidence indicates that a clear majority of people do not react negatively to wind farm developments or change their visiting behaviour as a result.
 - Disruption during the construction phase can be an annoyance for visitors and also businesses. The study found no evidence that it had deterred visitors, however it did note that such disruption should be minimised or mitigated through the planning process.
- 4.10. The analysis presented above indicates that solar and wind farms do not have any major negative impacts on tourism, with the presence of such schemes not appearing to significantly influence the decision to visit an area.

¹⁷ <https://www.economicvoice.com/wind-and-solar-farms-are-accepted-part-of-landscape-say-holidaymakers-in-cornwall/>

Public Attitude Towards Renewable Energy

- 4.11. Findings from the Department for Energy Security and Net Zero (formerly BEIS) Public Attitude Tracker found that in Spring 2023, 85% of the UK public supported renewable energy and this has remained stable since Winter 2022. It also found that of the renewable energy sources included in the tracker, solar had the highest public support at 88% (**Figure 4.1** shows this in more detail).

Figure 4.1: Public support for renewable by source, Spring 2023



Source: DESNZ Public Attitude Tracker

- 4.12. Research published in January 2022 by Copper Consultancy for Solar Energy UK presents the results of a survey into public attitudes to solar farm development. The main findings are summarised below:
- 56% of those surveyed said they would support the development of solar farms in their area. This figure was even higher in Wales with 68% saying they would support solar farms.
 - 17% of people who live near a solar farm have become more supportive of solar energy over time.
 - 28% of those surveyed said the most important issue when developing a solar farm was the creation of local jobs, skills and supply chain opportunities.

5. Summary

- 5.1. This report has highlighted the economic benefits that will be created by a proposed green infrastructure and 44MW solar and battery storage project in Swansea. The main findings from the analysis can be summarised as follows:

The Swansea Economy

- **Jobs:** Swansea saw an increase in employment between 2015 and 2018, but between 2018 and 2021 jobs in the local authority declined by 5,000, thus a 1.8% decrease between 2015 and 2021 overall. By contrast, Wales (1%) and Great Britain (5.2%) saw positive job growth overall. The Proposed Development will create jobs in Swansea and support the area's growth by providing new labour market opportunities.
- **Supporting economic growth:** In August 2020, the claimant count in Swansea was 6% and by August 2023 it had fallen to 3.5%. The claimant count in Swansea is currently above the rate seen in for Wales (3.2%) but below the rate for Great Britain. With uncertainty remaining about the UK's growth prospects, it is important that new job opportunities are created to support economic growth. It is particularly important to create new green jobs following the Roads Review by the Welsh Government, which may result in some proposed new roads being cancelled.

Benefits Generated by the Proposed Development

- **Construction phase employment:** The Proposed Development could support up to 163 temporary jobs, both direct jobs on-site and in the wider supply chain, during the nine-month construction period (and similar levels of employment during decommissioning of the project).
- **Contribution of construction phase to economic output:** The gross value added (GVA) generated by jobs supported during the construction phase could be up to £7.2million.
- **Operational benefits:** It is estimated that the Proposed Development will support up to five full-time equivalent jobs (FTE) in Swansea and the wider economy once it is operational. The GVA associated with the five FTEs is estimated to be £5.77million (present value) over the 40-year operational life span. Business rates generated by the solar project element of the Proposed Development could be in the region of £157,000 per annum.
- **Supporting economic development objectives:** The Proposed Development will support the Welsh Government's pledge to become net zero and the COP27 aim of reducing carbon emissions and increase generation of clean energy. At the regional scale, it will support South West Wales regional economic objectives in respect of investment in renewable energy and generating benefits across the wider economy and society.
- **Public attitudes towards renewable energy:** A report from DESNZ found that public support for renewable energy was at 85% in Spring 2023. This increased to 88% public support when asked about solar energy projects.

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