



Pennant Walters

GLANLLYNFI GARTH WIND FARM

Draft Environmental Statement

Chapter 15 - Socio-economics



Contents

15	Socio-economics	1
15.1	Introduction	1
15.2	Relevant legislation, planning policy and technical guidance	2
15.3	Consultation and Engagement	6
15.4	Data gathering methodology	7
15.5	Overall baseline	9
15.6	Embedded measures	24
15.7	Scope of the assessment	25
15.8	Assessment methodology	27
15.9	Assessment of Socio-economics effects: Climate Change and Energy Security	29
15.10	Assessment of Socio-economics effects: Economy and Community	30
15.11	Assessment of Socio-economics effects: Tourism and Recreation	33
15.12	Assessment of Socio-economics effects: Land Use	35
15.13	Assessment of cumulative (inter-project) effects	36
15.14	Significance conclusions	38

Tables

Table 15.1	Legislation relevant to the Socio-economics assessment	2
Table 15.2	Planning policy relevant to the Socio-economics assessment.	3
Table 15.3	Summary of EIA Scoping Direction responses for socio-economics	6
Table 15.4	Data sources used to inform the Socio-economics assessment	8
Table 15.5	Labour Market Profiles (Key Statistics)	12
Table 15.6	Employment by occupation (percentage)	15
Table 15.7	Earnings by place of residence (2025)	16
Table 15.8	Active business enterprises actual/percentage change (2010-2024)	17
Table 15.9	Welsh Index of Multiple Deprivation (WIMD) Ranking	19
Table 15.10	Volume and expenditure for overnight trips in Wales by nation of residence of visitors, January to December 2025	21
Table 15.11	Summary of the embedded environmental measures	24
Table 15.12	Socio-economics receptors subject to potential effects	26
Table 15.13	Summary of effects scoped into the Socio-economics assessment	26
Table 15.14	Summary of effects scoped out of the Socio-economics assessment	27
Table 15.15	Matrix of EIA significance	28
Table 15.16	Emissions to atmosphere if wind farm output replaces all non-renewable fuels	30
Table 15.17	Preliminary summary of significance of effects	39

Figures (see Volume 4)

Figure Number	Figure Title
Figure 15.1	Common Land and Open Access Land

15 Socio-economics

15.1 Introduction

15.1.1. This chapter presents the assessment of the likely significant effects of the Proposed Development with respect to socio-economics, including tourism and recreation, and land use. The assessment is based on information obtained to date. It should be read in conjunction with the project description provided in **Chapter 4: Development Description** and with respect to relevant parts of the following chapters:

- **Chapter 6: Landscape and Visual Impact Assessment** which assesses the visual effects on tourism and recreational receptors including users of Public Rights of Way (PRoW).
- **Chapter 12: Traffic and Transport** which assesses the impacts on PRoW.

15.1.2. This chapter describes:

- the legislation, policy and technical guidance that has informed the assessment (**Section 15.2**);
- consultation and engagement that has been undertaken and how comments from consultees relating to socio-economics have been addressed (**Section 15.3**);
- the methods used for baseline data gathering (Section 15.4);
- overall baseline (Section 15.5);
- embedded measures relevant to socio-economics (Section 15.6);
- the scope of the assessment for socio-economics (Section 15.7);
- the methods used for the assessment (Section 15.8);
- the assessment of socio-economics effects: Climate change and energy security (**Section 15.9**);
- the assessment of socio-economics effects: Economy and community (**Section 15.10**);
- the assessment of socio-economics effects: Tourism and recreation (**Section 15.11**);
- the assessment of socio-economics effects: Land use (Section 15.12)
- the assessment of cumulative (inter-project) effects (Section 15.13);
- a summary of the significant conclusions (Section 15.14); and
- an outline of further work to be undertaken for the ES (**Section 15.15**).

Limitations and assumptions

15.1.3. The Draft ES has been produced to fulfil Pennant Walters's consultation duties and enable consultees to develop an informed view of the likely significant effects of the Proposed Development.

- 15.1.4. There are no limitations relating to socio-economics that affect the robustness of the assessment of the potential likely significant effects of the Proposed Development. The assessment has been completed using professional judgement and has been informed by the findings of the **Chapter 6: Landscape and Visual Impact Assessment** and **Chapter 12: Traffic and Transport**. The assessment is based on the assumptions that the assessed project design, construction programme and embedded mitigation measures are implemented as described and that published socio-economic evidence and baseline conditions do not markedly change throughout the assessment period.

15.2 Relevant legislation, planning policy and technical guidance

- 15.2.1. This section identifies the legislation, planning policy and technical guidance that has informed the assessment of effects with respect to socio-economics. Further information on policies relevant to the Project is provided in **Chapter 5: Legislation and policy overview**.

Legislation

- 15.2.2. A summary of the relevant legislation is given in **Table 15.1**.

Table 15.1 Legislation relevant to the Socio-economics assessment

Legislation	Legislative Context
Countryside and Rights of Way (CROW) Act 2000	The CROW Act outlines the principal legislation governing the registration and protection of public footpaths, bridleways, byways open to all traffic and restricted byways.
Climate Change Act 2008 (as amended)	The Climate Change Act 2008 (as amended) introduces a clear, credible, long-term framework for the UK to achieve its goals of reducing carbon dioxide emissions and for adapting to the impacts of climate change. One of the key provisions of the amended Act is the introduction of legally binding targets on greenhouse gas emissions comprising reductions of at least 100% greenhouse gas emissions by 2050, against a 1990 baseline. The generation of electricity by renewable means such as wind energy is considered to be a key contributor towards meeting these targets.
Well-being of Future Generations (Wales) Act 2015	This Act places a duty on public bodies (including Welsh Ministers) to carry out sustainable development through their decision making. The Act puts in place seven well-being goals to help ensure that public bodies are all working towards the same vision of a sustainable Wales. The wellbeing goals act together to ensure outcomes across economic, environmental and social sustainability strands.
Environment (Wales) Act 2016 (as amended)	The Environment (Wales) Act 2016 (as amended), under Part 2, places a duty on the Welsh Ministers to ensure that the net Welsh greenhouse gas emissions account in 2050 is at least 100% lower than the 1990 baseline.

Planning Policy

- 15.2.3. A summary of the relevant national and local planning policy is given **Table 15.2**
Planning policy relevant to the Socio-economics assessment.

Table 15.2 Planning policy relevant to the Socio-economics assessment.

Technical guidance document	Context
National planning policy	
Future Wales: The National Plan 2040 ¹	Policy 17 Renewable and Low Carbon Energy and Associated Infrastructure states that decision makers must give significant weight to the need to meet international climate change commitments and Welsh Government targets to generate 70% of consumed energy by renewable means by 2030. The policy sets a presumption in favour of large-scale wind farms being developed in Pre-Assessed Areas for Wind (the Proposed Development Site is within PAA 10). Policy 18 Renewable and Low Carbon Energy Developments of National Significance states that proposals qualifying as Developments of National Significance will be permitted subject to Policy 17 and the criteria listed under Policy 18. Criteria 2 requires that there are no unacceptable adverse visual impacts on nearby communities and individual dwellings. The cumulative impacts of existing and consented renewable energy schemes should also be considered. Policy 33 National Growth Area – Cardiff, Newport and the Valleys sets out the overall strategic view for development in the South East which includes the area covered by Bridgend County Borough Council (BCBC) (which is the location of the Northern Array and Southern Array). Amongst other provisions, the Policy sets out support for investment in the Valleys that improves well-being, increases prosperity and addresses social inequalities.
Planning Policy Wales, Edition 12, (2024) ²	Paragraph 5.5.1 states that tourism can be a catalyst for investment, growth and job creation whilst 5.5.2 states that the planning system should encourage sustainable tourism where it contributes to economic regeneration. Paragraph 5.5.5 states that (inter alia) rights of way are important tourism and recreation assets both in their own right and as part of linking other attractions.
TAN 16: Sport, Recreation and Open Space (2009) ³	TAN 16 sets out the importance to Public Rights of Way (PROW) and their ability to connect wider open space and recreational corridors.

¹ Welsh Government (2021) Future Wales: The National Plan 2040 (Online) available at: <https://gov.wales/future-wales-national-plan-2040> (Accessed June 2026).

² Welsh Government (2024) Planning Policy Wales, Edition 12. (Online) Available at: https://www.gov.wales/sites/default/files/publications/2024-02/planning-policy-wales-edition-12_1.pdf (Accessed June 2026)

³ Welsh Government (2009) TAN 16: Sport, Recreation and Open Space. (Online) Available at: <https://gov.wales/sites/default/files/publications/2018-09/tan16-sport-recreation-open-space.pdf> (Accessed June 2026).

Technical guidance document	Context
TAN 23: Economic Development (2014) ⁴	TAN 23 supports the economic development of Wales and highlights the importance of delivering sustainable growth in rural areas.
Local planning policy	
Bridgend County Borough Local Development Plan 2018-2033 (Adopted 13 March 2024) ⁵	Policy SP3: Good Design and Sustainable Placemaking requires all development to deliver high-quality design and adopt a sustainable placemaking approach, creating attractive, healthy and well-connected places that respond positively to their natural, historic and built context. Policy SP4: Mitigating the Impact of Climate Change requires all development proposals to contribute positively to climate change mitigation and adaption. This includes (inter alia) minimising energy demand, supporting renewable and low carbon energy generation, using resources more efficiently. Policy PLA9: Development Affecting Public Rights of Way requires development to link with and seek to minimise impacts on the PRoW network. The policy states that any adverse impacts on the character, safety, enjoyment and convenient use of a PRoW must be mitigated. Policy SP13: Renewable and Low Carbon Energy Development supports renewable and low carbon energy development where proposals avoid unacceptable environmental, landscape, transport and amenity impacts, provide for restoration and grid connection, and do not give rise to cumulative effects. The policy also identifies Local Search Areas suitable for wind and solar energy developments subject to criteria. ENT12: Development in Mineral Safeguarding Zones seeks to safeguard mineral resources by ensuring that development within mineral safeguarding areas does not unnecessarily sterilise minerals. Proposals must demonstrate that extraction is either not viable, would not be prejudiced by the development, or that any temporary development can be restored within the timeframe required for future mineral working.
Neath Port Talbot Local Development Plan 2011-2026 (Adopted January 2016) ⁶	Policy SP 1: Climate Change seeks to achieve an appropriate contribution to renewable and low carbon energy generation. Policy SP 2: Health seeks (inter alia) the provision of new employment opportunities to reduce unemployment and economic inactivity rates. Policy SP17: Minerals seeks to ensure a sustainable supply of minerals by safeguarding resources, maintaining adequate reserves, and promoting efficient use of materials. Development must minimise impacts on the environment and communities,

⁴ Welsh Government (2014) TAN 23: Economic Development (Online). Available at:

<https://gov.wales/sites/default/files/publications/2018-09/tan23-economic-development.pdf> (Accessed June 2026).

⁵ Bridgend County Borough Council (2024) Bridgend County Borough Local Development Plan 2018-2033. (Online) Available at: <https://www.bridgend.gov.uk/media/izcfqp1f/written-statement.pdf> (Accessed June 2026).

⁶ Neath Port Talbot County Borough Council (2016) Neath Port Talbot Local Development Plan 2011-2026. (Online) Available at: https://media.npt.gov.uk/media/ca2fbumd/ldp_written_statement_jan16.pdf?v=20240823155047 (Accessed June 2026).

Technical guidance document	Context
	with buffer zones used to protect sensitive uses from mineral operations. M1: Development in Mineral Safeguarding Areas seeks to safeguard mineral resources by controlling development within mineral safeguarding areas. Proposals will only be permitted where the resource is of no value, can be extracted prior to development, would not be prejudiced, or there is an overriding need, including ensuring temporary uses do not sterilise future mineral extraction.
Rhondda Cynon Taf Local Development Plan up to 2021 (Adopted March 2011) ⁷	Policy AW5: New Development supports development where it is well designed, protects local character and amenity, and is compatible with surrounding uses. Policy AW6: Design and Placemaking supports high-quality design and placemaking by requiring development to reflect local character, integrate landscaping, promote sustainable transport and connectivity, and make efficient use of land. Policy CS10: Minerals seeks to safeguard mineral resources and ensure a sustainable supply by maintaining adequate reserves, protecting areas of known resources from sterilisation, and encouraging prior extraction where appropriate. AW14: Safeguarding of Minerals seeks to safeguard mineral resources by resisting development that would unnecessarily sterilise or hinder their extraction. It protects identified areas of sand and gravel, sandstone, limestone and coal, and applies buffer zones around active quarries to ensure continued operation.

Technical Guidance

- 15.2.4. There is no specific guidance for undertaking an assessment of socio-economic effects and no prescribed method for determining either the sensitivity of socio-economic receptors or the significance of effects on receptors. However, the guidance in National Policy Statement (NPS) EN-1 section 5.13 (DESNZ, 2026)⁸ has been considered in forming the scope of the assessment which focuses on the number of jobs created, the economic value of the scheme, effects on tourism and cumulative effects. The NPS also notes that socio-economic impacts may be linked to other impacts (notably visual impacts on tourism).

⁷ Rhondda Cynon Taf County Borough Council (2011) Rhondda Cynon Taf Local Development Plan up to 2021. (Online) Available at: <https://www.rctcbc.gov.uk/EN/Resident/PlanningandBuildingControl/LocalDevelopmentPlans/RelateddocumentsLDP20062021/AdoptedLocalDevelopmentPlan.pdf> (Accessed June 2026).

⁸ Department for Energy Security & Net Zero (2026) Overarching National Policy Statement for Energy (EN-1), 2025. It is recognised that the NPS no longer forms part of the policy provisions against which the Proposed Development will be assessed however the guidance on assessment of socio-economics is considered relevant as an approach.

15.3 Consultation and Engagement

Overview

- 15.3.1. The assessment has been informed by consultation responses and ongoing stakeholder engagement. An overview of the approach to consultation is provided in **Chapter 2: Approach to Environmental Impact Assessment**.

Scoping Opinion

- 15.3.2. A Scoping Direction was issued by Planning and Environment Decisions Wales (PEDW), on behalf of the Welsh Ministers, on 12 June 2026. A summary of the relevant responses received in the Scoping Opinion in relation to socio-economics and confirmation of how these have been addressed within the assessment to date is presented in **Table 15.3**.

Table 15.3 Summary of EIA Scoping Direction responses for socio-economics

Consultee	Consideration	How addressed in this Draft ES
PEDW ID.78	PEDW agrees with the approach set out in the Scoping Report and advises the Applicant to liaise directly with the relevant local authorities to agree on the local active businesses, communities and recreational and tourism organisations that should be considered in the assessment.	This Chapter assesses socio-economics in line with the proposed approach set out in the Scoping Report. Engagement with relevant local authorities will be undertaken (see paragraph 15.3.3).
PEDW ID.81	The intention to cover aspects of population and human health within relevant technical chapters rather than as a standalone chapter is welcomed.	Aspects of population and health within the context of socio-economic factors are considered in Sections 15.5 and 15.9 to 15.11 of this ES chapter. Other aspects are considered in other chapters of the Draft ES where relevant, notably Chapter 11: Ground Conditions , Chapter 13: Noise and Chapter 14: Shadow Flicker .

Technical Engagement

- 15.3.3. To date no specific engagement has taken place with consultees in relation to socio-economics. However, engagement will take place with officers of Bridgend County Borough Council (BCBC), Neath Port Talbot County Borough Council (NPTCBC) and Rhondda Cynon Taf County Borough Council (RCTCBC) regarding the businesses, communities, and recreational and tourism organisations considered in the assessment.

15.4 Data gathering methodology

- 15.4.1. There is no prescribed methodology or standard guidance for this aspect of an EIA. The method adopted is therefore one of determining the existing circumstances (the baseline) through desk-based analysis, utilising a range of statistical information. This statistical information has been drawn from a number of sources and covers various geographies, from ward level through to the national level.

Study area

- 15.4.2. The study area for baseline data covers the Site contained within the application boundary (the 'Site Boundary'), together with the wider county borough, regional and national context.

Climate change and energy security

- 15.4.3. The baseline study covers the national (Wales) area as a whole.

Economy and Community

- 15.4.4. The baseline study covers Wales, BCBC, NPTCBC and RCTCBC areas and the wards of:

- Garw Valley (BCBC);
- Maesteg East (BCBC);
- Llangynwyd (BCBC);
- Caerau (BCBC);
- Gwynfi and Croeserw (NPTCBC);
- Cymer and Glyncoirwg (NPTCBC);
- Blaengwrach and Glynneath West (NPTCBC);
- Treherbert (RCTCBC); and
- Hirwaun, Penderyn and Rhigos (RCTCBC).

Tourism and recreation

- 15.4.5. The tourism baseline study considers tourism at local (BCBC, NPTCBC and NPTCBC), regional (South Wales) and national (Wales) level. The recreation baseline, related to PRoW and Open Access Land, has focussed on the local context within 10km as informed by the Landscape and Visual Impact Assessment (LVIA) in **Chapter 6: Landscape and Visual Impact Assessment**.

Land Use

- 15.4.6. Consideration of potential effects upon land use includes for land directly affected (within the Site). With regard to minerals (aggregates), this is extended to consider the BCBC, NPTCBC and RCTCBC areas as the study area.

Desk Study

- 15.4.7. A summary of the organisations that have supplied data, together with the nature of that data is outlined in **Table 15.4**.

Table 15.4 Data sources used to inform the Socio-economics assessment

Organisation	Data source	Data provided
Department for Energy Security and Net Zero	Renewable electricity by local authority 2014-2024 ⁹	Installed capacity of renewable energy for BCBC, NPTCBC and RCTCBC.
Welsh Government	The Energy Generation in Wales 2023 report ¹⁰ Energy Generation & Use in Wales First Combined Edition (2026) ¹¹	Renewable energy generation statistics.
Nomisweb StatsWales	Local Authority Profile ¹² Population estimates by local authority, region, and age ¹³	Data related to demography, occupations, employment/unemployment, out-of-work benefits for BCBC, NPTCBC and RCTCBC and at ward level.
Welsh Government StatsWales	Welsh Index of Multiple Deprivation 2019 ¹⁴	Data for measures of deprivation by Lower Super Output Area (LSOA) and district level.
Welsh Government	Welsh Government Tourism profiles for southeast Wales Region ¹⁵ and Local Authorities ¹⁶ Welsh Government Visit Wales Tourism Market Demand Report (2023) ¹⁷	Data for spend and visitor trips by region and local authority area. Data for visitor trips in 2022 and forecasted visitor trips and movements in 2023.

⁹ DESNZ (2025) Renewable electricity by local authority 2014-2024. (Online) Available at: <https://www.gov.uk/government/statistics/regional-renewable-statistics> (Accessed June 2026).

¹⁰ Welsh Government (2025) Energy Generation in Wales 2023. (Online) Available at: <https://www.gov.wales/sites/default/files/publications/2025-02/energy-generation-in-wales-2023.pdf> (Accessed June 2026).

¹¹ Welsh Government (2026) Energy Generation & Use in Wales First Combined Edition. (Online) Available at: [Energy Generation & Use in Wales: first combined edition](#) (Accessed June 2026).

¹² Nomis (2025) Local Authority Profiles (Online). Available at: <https://www.nomisweb.co.uk/reports/lmp/la/contents.aspx> (Accessed June 2026).

¹³ StatsWales (2020) Population estimates by local authority, region and age. (Online) Available at: <https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Estimates/Local-Authority/populationestimates-by-localauthority-region-age> (Accessed June 2026).

¹⁴ Welsh Government (2019) Welsh Index of Multiple Deprivation (Online). Available at: <https://statswales.gov.wales/Catalogue/Community-Safety-and-Social-Inclusion/Welsh-Index-of-Multiple-Deprivation/WIMD-2019#:~:text=The%20Welsh%20Index%20of%20Multiple,several%20different%20types%20of%20deprivation.> (Accessed June 2026).

¹⁵ Welsh Government (2021) Tourism profile – Southeast Wales 2017-2019 (Online). Available at: <https://gov.wales/sites/default/files/statistics-and-research/2021-03/tourism-profile-south-east-wales-2017-2019.pdf> (Accessed June 2026).

¹⁶ Welsh Government (2021) Tourism profile – Wales Local Authorities 2011-19 (Online). Available at: <https://gov.wales/sites/default/files/statistics-and-research/2021-03/tourism-profile-wales-local-authorities-2011-19.pdf> (Accessed June 2026).

¹⁷ Welsh Government (2023) Visit Wales Tourism Market Demand Report – UK January 2023. (Online) Available at: <https://www.gov.wales/sites/default/files/statistics-and-research/2023-02/visit-wales-tourism-market-demand-report-uk-january-2023.pdf> (Accessed September 2025).

Organisation	Data source	Data provided
BCBC, NPTCBC, RTCCBC, NRW	Geographical Information System (GIS) of PRow / Open Access Land (OAL)	The location of PRowS was confirmed using the Definitive maps. The presence or absence of OAL designated under the Countryside and Rights of Way Act 2000 were obtained from Natural Resources Wales website.

Survey work

- 15.4.8. No survey work has been undertaken to inform the assessment of potentially significant effects related to socio-economics. The assessment is based on published data sources.

15.5 Overall baseline

Current baseline

Renewable energy – economic value in Wales

- 15.5.1. A study of the economic opportunities from onshore wind development in Wales was undertaken in 2013 for the Welsh Government (Regeneris Consulting Ltd and Welsh Economy Research Unit, 2013)¹⁸. The research highlighted the potential economic benefits from onshore wind development which may be felt in the local areas in which wind farms are developed and within the wider Welsh economy. Economic benefits derive from investment involved in the planning and development of schemes, construction of the turbines and in operation through ongoing maintenance. The research noted that the extent to which economic benefits from construction will flow directly into the Welsh economy will partly depend on the availability of skilled labour and manufacturing capacity, but that local suppliers are often well placed to supply some types of goods, such as aggregates and non-specialist engineering services. There are generally greater opportunities for investment in operations and maintenance to remain in the Welsh economy, including opportunities for locally based maintenance staff.
- 15.5.2. Overall, the study concluded that there is an opportunity for Wales to secure gross value added (GVA) of £2.3 billion between 2012 and 2050, with over 2,000 full time equivalent (FTE) jobs created in this period based on delivering 2GW of onshore wind capacity by 2025. It was noted that this would require measures to overcome barriers in the planning system and in the grid and road infrastructure, as well as a proactive approach to supply chain development. It was also noted that those local economies that stood to gain the

¹⁸ Regeneris Consulting Ltd and Welsh Economy Research Unit, Cardiff Business School for Renewables UK Cymru, Welsh Government (2013) Economic Opportunities for Wales from Future Onshore Wind Development (Online) Available at: <https://www.renewableuk-cymru.com/wp-content/uploads/Wales-Onshore-economic-benefit.pdf> (Accessed October 2025).

most from development were those with a strong presence of construction and manufacturing firms.

- 15.5.3. A RenewableUK¹⁹ report in 2021, estimated that if Wales built an additional 2.2GW to reach 3.5GW of onshore wind before 2030, Wales could see significant economic benefits with an expected £4.4 billion in GVA and 3,000 jobs by 2030. The report considered that onshore wind could help incubate skills, capacity and business growth.

Renewable energy – capacity in Wales

- 15.5.4. Welsh Government Ministers have a duty to ensure the Welsh carbon emissions in 2050 are 100% lower than the 1990 baseline (alternatively known as ‘net zero’); placed on them by the Environment (Wales) Act 2016 (as amended). Additionally, in September 2017, the Welsh Cabinet Secretary for Energy, Planning and Rural Affairs (Welsh Government, 2017)²⁰ proposed the following targets for Wales:
- Wales to generate 70% of its electricity consumption from renewable energy by 2030;
 - 1GW of renewable electricity capacity in Wales to be locally owned by 2030; and
 - By 2020 all new renewable energy projects to have at least an element of local ownership.
- 15.5.5. In January 2023 the Welsh Government (Welsh Government, 2023a)²¹ announced an updated target to meet 100% of its electricity needs from renewable sources by 2035 and to achieve 1.5GW of renewable energy capacity within local ownership by 2035. These targets were adopted in July 2023 (Welsh Government, 2023b)²².
- 15.5.6. The Energy Generation & Use in Wales First Combined Edition (Welsh Government, 2026a)²³ set out that 7.9TWh of energy generated in Wales was from renewables in 2024. Renewable electricity generation supplied 36% of total generation (compared to 34% in 2023). Wales had 1,285 MW of onshore wind capacity, which is greater than that in 2023 (1,267MW) (Welsh Government, 2025)²⁴. Onshore wind provided equivalent to 70% of renewable output generation capacity in Wales. One new wind farm (Llwyncelyn Farm in RCTCBC) was commissioned in 2024.
- 15.5.7. In 2024, 54% of all electricity consumed in Wales originated from renewable sources (Welsh Government, 2026a)²³, showing a marginal increase from the previous year (53%)

¹⁹ RenewableUK (2021) The onshore wind industry prospectus years 40 How a partnership between industry and Government can maximise the benefits of the clean power we need https://www.renewableuk.com/media/c55ckdrg/onshore-wind-industry-prospectus_2021.pdf (Accessed June 2026)

²⁰ Welsh Government (2017) Welsh Cabinet Secretary for Energy, Planning and Rural Affairs - Energy Generation Targets for Wales: Statement to Assembly Members (Online) Available at: <https://gov.wales/lesley-griffiths-high-ambition-clean-energy> (Accessed June 2026).

²¹ Welsh Government (2023a) Climate Change Minister - Wales aims to meet 100% of its electricity needs from renewable sources by 2035 (Online) Available at: <https://www.gov.wales/wales-aims-meet-100-its-electricity-needs-renewable-sources-2035> (Accessed June 2026)

²² Welsh Government (2023b) Written Statement: Publication of Summary of Responses to the Consultation on Wales' Renewable Energy Targets (Online) Available at: <https://www.gov.wales/written-statement-publication-summary-responses-consultation-wales-renewable-energy-targets> (Accessed June 2026)

²³ Welsh Government (2026) Energy Generation & Use in Wales First Combined Edition. (Online) Available at: [Energy Generation & Use in Wales: first combined edition](#) (Accessed June 2026).

²⁴ Welsh Government (2025) Energy Generation in Wales 2023. (Online) Available at: <https://www.gov.wales/sites/default/files/publications/2025-02/energy-generation-in-wales-2023.pdf> (Accessed June 2026).

(Welsh Government, 2025)²⁴ but still substantially below the 2035, 100% target. The Cardiff Capital Region generated 25% of total annual renewable energy generation in 2024, with this being 27% for the Swansea Bay City region.

- 15.5.8. In 2024, the BCBC area generated 210 GWh of renewable energy whilst consuming 3,315 GWh of energy. This imbalance between renewable generation and consumption can also be seen in the NPTCBC area (generates 1,015 GWh of renewable energy against the consumption of 7,445 GWh of energy) and RCTCBC area (650 GWh of renewable energy against the consumption of 4,440 GWh of energy) (Welsh Government, 2026a)²³.
- 15.5.9. Installed capacity from onshore wind in 2024 was reported for BCBC as 59 MW across 17 projects, 230 MW across 22 projects for NPTCBC, and 207 MW across 16 projects for RCTCBC (Welsh Government, 2026a)²³. This differs from DESNZ (2025)²⁵, which reports installed figures for BCBC of 110.4 MW of capacity across 19 onshore wind projects, 133.6 MW across 11 projects for NPTCBC area, and 311.1 MW across 15 projects for the RCTCBC area in 2024. The differences reflect methodological differences in the identification and allocation of onshore wind projects between local authority areas. Given the concentration of large onshore wind developments across the upland areas spanning BCBC, NPTCBC, RCTCBC and other adjoining authorities, differences in project attribution, aggregation and inclusion criteria are likely to account for the variation between the datasets. The Welsh Government (2026a)²³ data has been used as the primary data source for the allocation of installed capacity across authority boundaries, as it is prepared specifically to monitor renewable energy generation in Wales and incorporates a Wales-wide evidence base that has been reviewed with relevant stakeholders and industry participants where appropriate (Welsh Government, 2026a: 68). Given the prevalence of wind farm developments that extend across administrative developments in South Wales, this is considered likely to provide a robust and consistent basis for attributing installed capacity between local authorities.
- 15.5.10. At 0.99 GW at the end of 2024, it is reported that Wales is 66% of the way towards its 2035 1.5 GW local ownership target (Welsh Government, 2026a)²³.

Economy and community – employment and benefit claimant status

- 15.5.11. As described in **Section 15.4**, the Study Area includes the ward level geographies that will be used to assess the potential impact of the Proposed Development. The Site boundary is within the BCBC²⁶, NPTCBC²⁷ and RCTCBC²⁸ area, which had a population of 147,530, 143,249 and 242,844 respectively in 2024. The Northern Array and Southern Array are located solely in BCBC.
- 15.5.12. The Site encompasses the following wards:
- BCBC Area
- Llangynwyd Ward;

²⁵ DESNZ (2025) Renewable electricity by local authority 2014-2024. (Online) Available at: <https://www.gov.uk/government/statistics/regional-renewable-statistics> (Accessed June 2026). Page 41.

²⁶ Nomis (2026) Labour Market Profile – Bridgend. (Online) Available at: <https://www.nomisweb.co.uk/reports/lmp/lad/1778385204/report.aspx> (Accessed 23 June 2026).

²⁷ Nomis (2026) Labour Market Profile – Neath Port Talbot. (Online) Available at: <https://www.nomisweb.co.uk/reports/lmp/lad/1778385203/report.aspx> (Accessed 23 June 2026).

²⁸ Nomis (2026) Labour Market Profile – Rhondda Cynon Taf. (Online) Available at: <https://www.nomisweb.co.uk/reports/lmp/lad/1778385207/report.aspx> (Accessed 23 June 2026).

- Garw Valley Ward;
- Maesteg East Ward; and
- Caerau Ward.

NPTCBC

- Gwynfi and Croeserw Ward;
- Cymer and Glyncoerwg Ward; and
- Blaengwrach and Glynneath West Ward.

RCTCBC

- Treherbert Ward; and
- Hirwaun, Penderyn and Rhigos Ward.

15.5.13. The labour market profiles of Wales as a whole, the BCBC, NPTCBC and RCTCBC areas, and the wards, are set out in **Table 15.5**.

Table 15.5 Labour Market Profiles (Key Statistics)

Area		Population age 16-64*	Employed (economically active)*+	Unemployed *+	Out of work claimants** (Universal Credit) ²⁹
Wales	Total	1,947,716	1,553,000	59,000	65,469
	Percentage	61.1%	75.2%	3.8%	4.3%
Bridgend County Borough	Total	90,414	67,900	3,700	2,695
	Percentage	61.3%	74.7%	5.5%	3.0
Neath Port Talbot County Borough	Total	87,583	65,900	1,900	2,750
	Percentage	61.1%	72.1%	2.9%	3.1%
Rhondda Cynon Taf County Borough	Total	151,290	107,000	6,400	4,825
	Percentage	62.3%	69.3%	6.0%	3.2%
Llangynwyd Ward	Total	1,800	1,331	45	
	Percentage	60.7%	73.9%	2.5%	
Garw Valley Ward	Total	4,858	3,446	198	
	Percentage	63.1%	70.9%	4.0%	
Maesteg East Ward	Total	2,715	1,880	91	
	Percentage	57.7%	69.2%	3.3%	
Caerau Ward	Total	4,049	2,398	182	
	Percentage	60.7%	59.2%	4.4%	

²⁹ Nomis has yet to produce Ward Profiles based on the Census 2021 data. Therefore, Out of work claimants (Universal Credit) information on a Ward level is not readily available. Data provided for Wales and the LAs is from May 2026.

Area		Population age 16-64*	Employed (economically active)*+	Unemployed *+	Out of work claimants** (Universal Credit) ²⁹
Gwynfi and Croeserw Ward	Total	1,547	815	79	
	Percentage	59.5%	52.6%	5.1	
Cymer and Glyncorrwg Ward	Total	1,278	833	49	
	Percentage	59.7%	65.1%	3.8%	
Blaengwrach and Glynneath West Ward	Total	1,885	1,203	91	
	Percentage	60.0%	63.8%	4.8%	
Treherbert Ward	Total	3,364	2,157	190	
	Percentage	58.9%	64.1%	5.6%	
Hirwaun, Penderyn and Rhigos Ward	Total	3,587	2,486	111	
	Percentage	57.8%	69.3%	3.0%	

Source: Nomisweb (2025) Labour Market Profiles

*2024 ONS population data for Wales and LAs. 2021 ONS Census population data used for Wards.

*+2024 ONS population data underpins inputs. Seasonally adjusted February 2026 – April 2026 data used for Wales. January 2025 – December 2025 data used for LAs. 2021 ONS Census data used for Wards and there is a disconnect between the available age information (and associated groupings) and economic activity data.

** As of May 2026.

- 15.5.14. The areas of BCBC (61.3%), NPTCBC (61.1%) and RCTCBC (62.3%) all had a fairly similar proportion of their population that are of working age (16-64) in 2024 and this was similar to Wales as a whole (61.1%). However, in terms of the number of working age people this comprises, RCTCBC had the highest number of working age people (151,290), with BCBC (90,414) and NPTCBC (87,583) having significantly fewer.
- 15.5.15. The number of people who were economically active in the BCBC area in 2024 was 67,900, equating to 74.7% of its population. For NPTCBC, 65,900 people were economically active in 2024, which equated to 72.1% of its population. Finally, for RCTCBC, 107,000 people were economically active in 2024, which comprises 69.3% of its population. Whilst this was not dissimilar to BCBC and NPTCBC, it does mean that RCTCBC had the lowest proportion of its population that was economically active, though still has the largest overall population that being economically active due to having significantly more people of working age.
- 15.5.16. BCBC (5.5%) and RCTCBC (6.0%) had significantly higher unemployment rates than NPTCBC (2.9%) and Wales (3.8%) as a whole.
- 15.5.17. In terms of the Wards in which the Proposed Development would be located, Llangynwyd Ward had the highest proportion of its population being economically active in 2024 (73.9%). Garw Valley Ward (70.9%), Maesteg East Ward (69.2%) and Hirwaun, Penderyn and Rhigos Ward (69.3%) had a lower proportion of their population being economically active but were not dissimilar from Llangynwyd Ward. Gwynfi and Croeserw Ward had a significantly lower proportion of its population being economically active at 52.6%, which is

the lowest out of any identified comparator area, with the second lowest recorded economic activity rate being identified within Caerau Ward (59.2%).

- 15.5.18. Whilst many of the wards had similar economic activity rates to the County Borough areas and Wales as a whole, there are a number of wards that had significantly lower economic activity rates. This can also be seen in the unemployment rates identified for the wards, with many of the wards having unemployment rates similar to Wales and NPTCBC. However, the Treherbert Ward (5.6%) and Gwynfi and Croeserw Ward (5.1%), for example, had higher unemployment rates, which make them similar to BCBC and RCTCBC.

Economy and community – Local Economic Activity

- 15.5.19. The working age population of the CCBC, NPTCBC and RCTCBC areas is broadly similar to the Welsh average (see **Table 15.5**). However, there are differences in occupation groups (see **Table 15.6**).
- 15.5.20. When compared to Wales (48.5%), BCBC (46.5%) has a slightly lower proportion of its economically active population in management and professional occupations (groups 1-3), with NPTCBC area (42.8%) having an even lower proportion of its economically active population within such roles, whilst RCTCBC area (48.1%) is not too dissimilar from Wales.
- 15.5.21. The profile for the remaining occupations in these areas is broadly similar to the Wales average, though there are some noticeable differences. RCTCBC has the highest proportion of workers employed within administrative & secretarial and skilled trade occupations (Groups 4 and 5) at 22.6% of its population (19.4% for Wales). The NPTCBC area has a significantly higher proportion of its workforce employed within the process plant & machine and elementary occupations (Groups 8 and 9) at 23.3%, which is much higher than for BCBC (18.1%) and RCTCBC (15%).
- 15.5.22. There are significant variations in the makeup of the employment profile across the wards identified. Llangynwyd Ward has the highest proportion of its population in Groups 1 to 3 employment (professional occupations) at 43.5%. Gwynfi and Croeserw Ward has the lowest proportion of its population in these roles at 21.2%.
- 15.5.23. Significant differences exist between the wards and the proportion of their population working within caring, leisure & other services and sales & customer service occupations (Group 6 and 7). Gwynfi and Croeserw Ward has the highest proportion of its population within these occupations at 31.6% and this is the most common form of employment within this ward. The Hirwaun, Penderyn and Rhigos Ward has significantly less of its population employed in these occupations at 18.8%.
- 15.5.24. The wards are similar in terms of the proportion of their population that are employed within administrative & secretarial and skilled trade occupations (Groups 4 and 5), with Blaengwrach and Glynneath West Ward having the highest amount at 25.5% and Caerau Ward having the lowest at 19.8%.
- 15.5.25. The wards are also broadly similar in terms of the proportion of their population that are employed within process plant & machine and elementary occupations (Groups 8 and 9), though there is a significant difference between Caerau Ward (29.3%) and Llangynwyd Ward (17.3%).

Table 15.6 Employment by occupation (percentage)

Occupation Group	Wales*	Bridgend County Borough*	Neath Port Talbot County Borough*	Rhondda Cynon Taf County Borough	Llangynwyd Ward**	Garw Valley Ward **	Maesteg East Ward **	Caerau Ward **	Gwynfi and Croeserw Ward **	Cymer and Glyncoirwg Ward **	Blaengwrach and Glynneath West Ward **	Treherbert Ward **	Hirwaun, Penderyn and Rhigos Ward **
1. Managers, directors and senior officials	9.8	11.1	8.6	8.8	11.0	7.0	6.4	5.1	5.9	8.1	6.3	7.1	10.5
2. Professional occupations	23.3	18.8	19.8	21.6	20.1	10.3	14.0	9.3	7.3	9.7	13.9	11.7	16.1
3. Associate professional and technical occupations	15.4	16.6	14.4	17.7	12.4	10.4	9.1	9.4	8.0	9.0	9.4	7.9	10.8
4. Administrative and secretarial occupations	9.3	10.6	9.2	12.9	8.4	8.2	9.3	6.9	7.2	8.2	10.8	8.5	9.2
5. Skilled trades occupations	10.1	7.7	10.0	9.7	11.6	13.6	14.5	12.9	14.5	15.8	14.7	16.3	13.1
6. Caring, leisure and other service occupations	9.7	12.9	9.4	10.0	12.8	14.8	15.7	16.6	22.2	17.8	12.7	16.7	11.1
7. Sales and customer service occupations	6.1	3.9	5.0	4.2	6.4	9.3	8.4	10.5	9.4	7.9	8.5	8.1	7.7
8. Process plant and machine operatives	6.1	9.1	9.3	6.0	7.9	11.9	9.8	14.4	12.4	10.2	10.2	11.1	10.8
9. Elementary Occupations	9.8	9.0	14.0	9.0	9.4	14.6	12.8	14.9	13.0	13.3	13.5	12.6	10.7

*ONS Data for January 2025 to December 2025 **ONS Data for January 2021 to December 2021

Economy and community – Earnings

- 15.5.26. Table 15.7 identifies the earnings by place of residence in 2025 for Wales, and the BCBC, NPTCBC and RCTCBC areas. Whilst the areas identified have broadly similar gross weekly pay, RCTCBC has a lower gross weekly pay (£665.50) than Wales (£719.30), BCBC (£737.70) and NPTCBC (£693.00).
- 15.5.27. BCBC (£19.01) has a higher hourly pay rate than Wales (£18.15), which is significantly higher than for NPTCBC (£17.83) and RCTCBC (£17.43).

Table 15.7 Earnings by place of residence (2025)

	Wales ³⁰	Bridgend County Borough ³¹	Neath Port Talbot County Borough ³²	Rhondda Cynon Taf County Borough ³³
Gross Weekly Pay (£)	719.30	737.70	693.00	665.50
Hourly Pay (£)	18.15	19.01	17.83	17.43

Source: Nomis Labour Market Profiles.

Economy and community – Business Enterprises

- 15.5.28. The Welsh Government measures active businesses within Wales each year and this is quantified within **Table 15.8**.
- 15.5.29. The percentage increase in the number of active businesses between 2010 and 2021 was highest in RCTCBC (36%), which is significantly higher than for Wales (17%), BCBC (22%) and NPTCBC (9%). It is also identified that between 2021 and 2024 all areas experienced a decrease in business enterprises, with the largest loss being in RCTCBC (-13%), with Wales (-5%) and NPTCB (-5%) experiencing the same loss in percentage terms.

³⁰ Nomis (2026) Labour Market Profile - Wales. (Online). Available at: <https://www.nomisweb.co.uk/reports/lmp/por/2013265930/report.aspx> (Accessed July 2026).

³¹ Nomis (2026) Labour Market Profile - Bridgend. (Online). Available at: <https://www.nomisweb.co.uk/reports/lmp/lad/1778385204/report.aspx> (Accessed July 2026).

³² Nomis (2026) Labour Market Profile – Neath Port Talbot. (Online). Available at: <https://www.nomisweb.co.uk/reports/lmp/lad/1778385204/report.aspx> (Accessed July 2026).

³³ Nomis (2026) Labour Market Profile – Rhondda Cynon Taf. (Online). Available at: <https://www.nomisweb.co.uk/reports/lmp/lad/1778385207/report.aspx> (Accessed July 2026).

Table 15.8 Active business enterprises actual/percentage change (2010-2024)³⁴

Location	2010	2015	2021	Percentage increase/decrease 2010-2021	2023	2024	Percentage increase/decrease 2021-2024
Wales	90,435	95,010	105,815	17%	102,215	100,420	-5%
BCBC	3,700	3,950	4,505	22%	4,250	4,045	-10%
NPTCBC	3,115	3,145	3,395	9%	3,405	3,220	-5%
RCTCBC	5,170	5,745	7,020	36%	6,500	6,080	-13%

Economy and community – Deprivation

- 15.5.30. The Welsh Index of Multiple Deprivation (WIMD, 2025³⁵) is an official Welsh Government measure of deprivation in Wales. The WIMD includes a number of different measures in small geographic areas called Lower Super Output Areas (LSOA). The WIMD is designed to allow comparison of deprivation across the country with LSOAs ranked from 1 (most deprived) to 1,917 (least deprived). A ranking for each LSOA is provided for eight measures of deprivation (income, employment, health, education, access to services, community safety, physical environment, and housing). An overall score is also given (the Index). **Table 15.9** sets out the ranking for the LSOAs covering the Site and the LSOAs that are in close proximity to the Site.
- 15.5.31. The Site is located across the LSOAs of Llangynwyd 1, Llangeinor, Pontycymmer 1, Maesteg East 2, Caerau (Bridgend) 4, Gwynfi, Cymer (Neath Port Talbot) 3, Treherbert 3, Blaengwrach, Rhigos and Blaengarw.
- 15.5.32. Whilst Llangynwyd 1 records the least deprived overall ranking of the identified LSOAs, several areas, including Gwynfi, Cymer (Neath Port Talbot) 3, Treherbert 3 and Caerau (Bridgend) 4, fall within the 20% most deprived LSOAs in Wales. This indicates that pockets of significant deprivation are present within parts of the Study Area.
- 15.5.33. The more deprived LSOAs generally perform poorly across multiple deprivation domains, particularly income, employment, health and education. Gwynfi is notable in this regard, ranking amongst the most deprived areas across several indicators, whilst similar patterns are evident within Caerau (Bridgend) 4, Cymer (Neath Port Talbot) 3 and Treherbert 3. Health deprivation is a particular issue within parts of the Study Area, with Gwynfi, Caerau (Bridgend) 4 and Blaengarw ranking amongst the most health-deprived LSOAs in Wales. In contrast, Llangynwyd 1 performs relatively well across a number of deprivation measures, including health.

³⁴ StatsWales (2025) Active Business Enterprises by area and year. (Online) Available at: [https://stats.gov.wales/en-GB/f2dc5994-cf29-4cb7-b692-360b87a85c71#:~:text=This%20dataset%20details%20business%20births%2C,reference%20period%20\(December%20to%20December\)](https://stats.gov.wales/en-GB/f2dc5994-cf29-4cb7-b692-360b87a85c71#:~:text=This%20dataset%20details%20business%20births%2C,reference%20period%20(December%20to%20December).). (Accessed July 2026).

³⁵ Welsh Government (2025) Welsh Index of Multiple Deprivation 2025: index and domain ranks and groups, for Lower layer Super Output Areas (LSOA). Available at: https://stats.gov.wales/en-GB/9706edd9-73ad-4902-bb12-7ccd7038626e/pivot/ju4a61r3udfc?page_size=25#dataset-nav (Accessed July 2026).

- 15.5.34. Levels of access to services and physical environment deprivation also vary across the Study Area. Rhigos and Cymer (Neath Port Talbot) 3 record comparatively high levels of deprivation in relation to access to services, reflecting the challenges associated with accessing key services in more rural locations. Overall, the WIMD data identifies a mixed socio-economic baseline characterised by both relatively less deprived and more deprived communities. However, none of the identified LSOAs fall within the 20% least deprived areas in Wales. The evidence indicates that deprivation is concentrated within several valley communities surrounding the Site, particularly in relation to employment, health and education, with socio-economic challenges also evident across the wider Study Area.

Table 15.9 Welsh Index of Multiple Deprivation (WIMD) Ranking

LSOA	Overall	Income	Employment	Health	Education	Access to Services	Housing	Community Safety	Physical Environment
Llangynwyd 1 W01001012	1,316	1,477	1,267	1,160	1,158	326	1,245	1,702	612
Llangeinor W01001009	712	813	892	740	546	392	615	1,069	573
Pontycymmer 1 W01001042	648	645	422	713	928	1,505	348	539	1,125
Maesteg East 2 W01001015	481	583	506	360	268	408	1,301	1,009	1,452
Caerau (Bridgend) 4 W01000994	320	466	295	222	221	612	891	761	797
Gwynfi W01000930	103	190	72	123	7	720	811	734	971
Cymer (Neath Port Talbot) 3 W01001990	244	426	274	383	149	205	858	919	242
Treherbert 3 W01001267	294	358	283	373	140	370	981	865	1,426
Blaengwrach W01000893	616	658	538	895	265	1,445	977	842	259
Rhigos W01001233	764	1,036	627	848	513	174	1,346	1,440	1,434
Blaengarw W01000978	490	547	501	257	494	863	529	1,127	1,340

Source: Welsh Index of Multiple Deprivation (2025)³⁶

³⁶ Welsh Government (2025) Welsh Index of Multiple Deprivation 2025: index and domain ranks and groups, for Lower layer Super Output Areas (LSOA). Available at: https://stats.gov.wales/en-GB/9706edd9-73ad-4902-bb12-7ccd7038626e/pivot/ju4a61r3udfc?page_size=25#dataset-nav (Accessed July 2026).

Tourism and Recreation – Regional Tourism

- 15.5.35. Tourism was worth around £3.8 billion Gross Value Added (GVA) to the Welsh economy in 2022, equivalent to 5.1% of total GVA (Welsh Government, 2024)³⁷. The largest tourism-related industries that contribute to this are food and beverage services (2.5% of Wales' GVA, £1.9 billion) and accommodation which accounted for 1.2% (£0.9 billion) GVA. The Welsh Government's strategy *Welcome to Wales: Priorities for the visitor economy 2020-25* (Welsh Government, 2020b)³⁸ sets out the overall approach to promoting and developing the visitor economy to deliver sustainable and ongoing benefits from tourism. Four Regional Tourism Fora have been established to help drive tourism strategies for North, Mid, South-West and South-East Wales to improve the competitive performance of tourism so that it makes a stronger contribution to the economic and social prosperity of Wales working with Visit Wales, local authorities, tourism businesses. In 2023, the Welsh Government considered that historically Wales had not received enough international visitors, as in 2019 it only received 1.02 million international tourists, which is considerably lower than Scotland (3.46 million) and the wider UK (41 million)³⁹. The Welsh Government is currently in the process of reevaluating how it attracts tourists to Wales, especially international tourists.
- 15.5.36. The tourism sector contributes significantly to the region's economy. The latest regional tourism data is set out in the Tourism Profile – South-East Wales 2017-2019 (Welsh Government, 2021a)¹⁵ which shows that annual average tourism expenditure in South-East Wales stood at £2.17 billion in 2017-19, which was a 6% decrease in expenditure of £2.30 billion in 2016-18. Expenditure in southeast Wales accounted for 35% of tourism expenditure in Wales as a whole. The effects Covid-19 are not reflected in these figures.
- 15.5.37. Tourist related businesses and enterprises accounted for 11.8% (12,625) of all registered enterprises in Wales in 2023 (Welsh Government, 2024). Hospitality associated businesses and enterprises form the largest share of tourist business and enterprises, comprising 80% (10,065), whilst food and beverage service activities comprise 7.3% of enterprises (7,840) and accommodation comprises 1.7% (1,810).
- 15.5.38. In 2022, employment within tourism industries stood at 159,000 people, accounting for 11.8% of Wales' employment (Welsh Government, 2024). Median hourly pay in the financial year ending April 2023 was £14.85 within Wales but remained significantly lower in tourism-related industries:
- Accommodation and food services median hourly pay: £10.99; and
 - Arts, entertainment, and recreational jobs median hourly pay: £12.83.
- 15.5.39. The comparatively low earnings associated with tourism-related industries indicate that tourism employment often comprises lower-paid occupations when compared to the

³⁷ Welsh Government (2024) Wales Visitor Economy Profile: 2024. (Online) Available at: <https://www.gov.wales/wales-visitor-economy-profile-2024> (Accessed July 2026).

³⁸ Welsh Government (2020) *Welcome to Wales: Priorities for the visitor economy 2020-2025* (Online) Available at: <https://gov.wales/sites/default/files/publications/2020-02/welcome-to-wales-priorities-for-the-visitor-economy-2020-2025.pdf> (Accessed July 2026).

³⁹ Welsh Government (2023) Wales as a global tourist destination – Fourth report of session 2022-23. (Online) Available at: <https://committees.parliament.uk/publications/40824/documents/198909/default/> (Accessed July 2026).

Welsh economy as a whole. Consequently, tourism remains an important employment sector, particularly in rural and valley communities where alternative employment opportunities may be more limited.

- 15.5.40. The Welsh Government (2026b)⁴⁰ identified that in 2025, residents of Great Britain living outside of Wales generated just over 7 in 10 of all overnight trips taken in Wales, with residents of England generating the most trips and expenditure. Residents of Wales generated just under 3 in 10 trips taken in Wales. **Table 15.10** further highlights the importance of people taking trips from England to Wales and from people within Wales visiting other parts of the country.

Table 15.10 Volume and expenditure for overnight trips in Wales by nation of residence of visitors, January to December 2025⁴¹

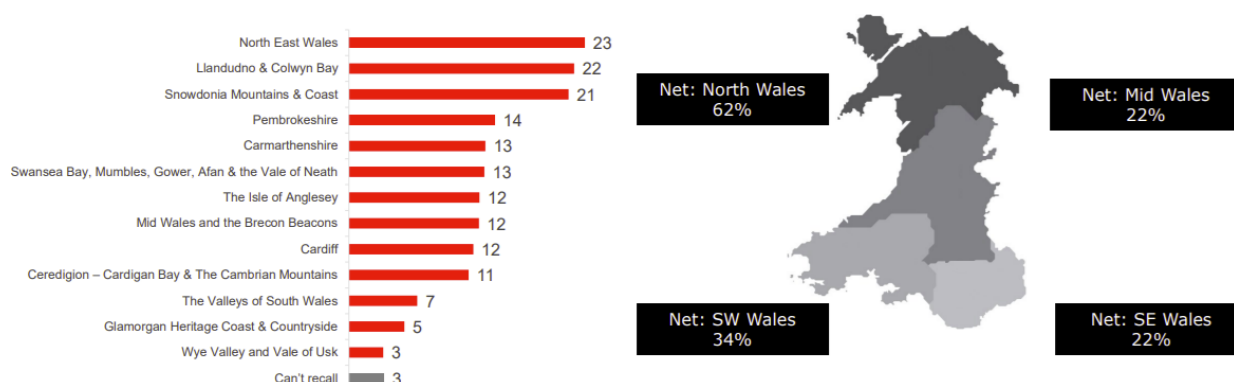
Nation of residence	Trips (millions)	Spend (£ millions)	% of Wales trips
England	5.37	£1,717	69%
Scotland	0.26	£100	3%
Wales	2.13	£486	27%

- 15.5.41. **Plate 1** outlines data for 2022 and highlights that the north of Wales is a more popular tourist destination (62% of all visitors) when compared to the other regions of Wales (Southeast Wales, 22% of all visitors). It also highlights that the most popular tourist destinations are located within the north of Wales. Whilst South-East Wales attracts a lower proportion of visitors than North Wales, it nevertheless accounts for over one-fifth of all visitors to Wales and represents one of the country's most important tourism regions.

⁴⁰ Welsh Government (2026) Domestic GB Tourism Statistics: 2025 (provisional). (Online) Available at: <https://www.gov.wales/domestic-gb-tourism-statistics-2025-provisional-html#206929> (Accessed July 2026).

⁴¹ Welsh Government (2026) Domestic GB Tourism Statistics: 2025 (provisional). (Online) Available at: <https://www.gov.wales/domestic-gb-tourism-statistics-2025-provisional-html#206929> (Accessed July 2026).

Plate 1 **Wales destinations visited on trip in 2022, Percentage, All 2022 Wales trip takers⁴²**



Tourism and Recreation - Local Tourism

- 15.5.42. The latest data in the Welsh Government Tourism Profile for Local Authorities (Welsh Government, 2021b)⁴³ indicates a mixed tourism performance across the BCBC, NPTCBC and RCTCBC areas. Overnight visitor numbers declined across all three authority areas between 2011–2013 and 2017–2019 reporting periods, accompanied by a reduction in overall tourism expenditure in BCBC and NPTCBC, whilst RCTCBC recorded a modest increase in tourism spend.
- 15.5.43. Trends in international tourism were more variable. Whilst the BCBC area experienced a reduction in international visitor numbers, NPTCBC and RCTCBC recorded increases. International visitor expenditure increased in Bridgend and substantially increased in Neath Port Talbot, whereas Rhondda Cynon Taf experienced a modest decline (Welsh Government, 2021b).
- 15.5.44. BCBC's Destination Management Plan 2022–2027 (BCBC, 2022),⁴⁴ NPTCBC's Destination Management Plan 2023–2028 (NPTCBC, 2023)⁴⁵ and RCTCBC's Tourism Strategy (RCTCBC, 2021)⁴⁶ seek to grow the visitor economy through sustainable tourism development, enhancement of visitor experiences, promotion of landscape, heritage and cultural assets, improvements to tourism infrastructure and accommodation, and support for local businesses, skills and employment. They recognise tourism as an important contributor to economic growth and place-making across the County Borough Council (CBC) areas.
- 15.5.45. Local tourism assets within 10km of the Site include Bryngarw Country Park, Maesteg Golf Club, Castell Coety and Newcastle Castle, Bridgend. Visitor accommodation includes

⁴² Welsh Government (2023) Visit Wales Tourism Market Demand Report – UK January 2023. (Online) Available at: <https://www.gov.wales/sites/default/files/statistics-and-research/2023-02/visit-wales-tourism-market-demand-report-uk-january-2023.pdf> (Accessed September 2025).

⁴³ Welsh Government (2021) Tourism profile – Wales local authorities 2011–19. (Online) Available at: <https://www.gov.wales/sites/default/files/statistics-and-research/2021-03/tourism-profile-wales-local-authorities-2011-19.pdf> (Accessed July 2026).

⁴⁴ Bridgend County Borough Council (2022) Bridgend County Borough Council Destination Management Plan 2022–2027(Online). Available at: <https://www.bridgend.gov.uk/media/it1bbp5v/destination-management-plan-2022-2027.pdf> (Accessed July 2026).

⁴⁵ Neath Port Talbot County Borough Council (2023) Neath Port Talbot Destination Management Plan (DMP) (Online). Available at: <https://www.npt.gov.uk/council/strategies-plans-and-policies/people-and-places/destination-management-plan/> (Accessed July 2026).

⁴⁶ Rhondda Cynon Taf County Borough Council (2021) Rhondda Cynon Taf Tourism Strategy (Online). Available at: <https://www.rctcbc.gov.uk/EN/GetInvolved/Consultations/CurrentConsultations/RelatedDocuments/TourismStrategy2020.pdf> (Accessed July 2026)

Coytrahen House, Tondy, luxury Mongolian Yurt Camping (Bettws), Willow Springs Campsite (near Glynccorrwg), and Fedwen Pods (near Cwmafan).

Tourism and Recreation – Recreation

- 15.5.46. There are a number of Public Rights of Way (PRoWs) that cross or are in close proximity to the Site. The PRoWs that cross the Site are outlined in detail in Table 3.1 of the **Outline Public Rights of Way Management Plan (Appendix 12A) (Outline PRoWMP)**. They are identified in **ES Figure 12.3**, with a more detailed plan contained in **Outline PRoWMP (Appendix 12A) Figure 12A.1**. The **Outline PRoWMP (Appendix 12A)** states that 18 footpaths, 13 bridleways and one uncategorised PRoW have been identified as interacting with the Proposed Development, of which 17 are located in BCBC, 14 in NPTC and one in RCTCBC. National Cycle Network (NCN) route 47 which runs along the access track within the Development Site north of the A4107.
- 15.5.47. Within 10km of the Development Site are part of a number of promoted long-distance recreational routes (see **ES Figure 6.9**): Bridgend Circular Walk, Celtic Way, Cistercian Way (Wales), Coed Morgannwg Way, Glamorgan Ridgeway Walk, Taith Fford Las Ogwr/Ogwr Ridgeway Walk, Sky to Sea: Over the Bwlch, Sky to Sea: Through the Vale, St Illtyd's Walk.
- 15.5.48. An area of Open Access Land (OAL) overlaps the area of the Northern Array. Additionally, an area of OAL borders a section of the access track south of the A4107 and a section of the access track north of the A4107. The areas of OAL are set out in **Figure 12A.2**. There are also extensive areas of OAL in the wider 10 km Study Area including Pen-y-Foel; Mynydd Llangeinwyr; and Garw Forest. The access road passes close to registered Common Land at Mynydd Llangeinwyr but no works are proposed on the Common (see **ES Figure 15.1**).

Land Use

- 15.5.49. The Site is in agricultural use, used predominantly for the grazing of livestock. The Northern Array and Southern Array are located within a BCBC mineral safeguarding area for sandstone. The access road (existing) is within a safeguarding area for sandstone and coal within the NPTCBC area and for sandstone within the RCTCBC area.

Future baseline

- 15.5.50. It is unlikely that the future socio-economic baseline will alter markedly in the short to medium term. With regards to climate change and renewable energy generation, there can be an expected ongoing gradual shift away from fossil fuels towards renewables.
- 15.5.51. The economic profile of the BCBC, NPTCBC and RCTCBC areas is expected to remain broadly consistent with the current baseline. RCTCBC and BCBC are anticipated to continue to have proportions of their economically active population employed in managerial and professional occupations (Groups 1–3) broadly comparable to the Welsh average, whereas NPTCBC is expected to continue to have a lower proportion of workers in these occupations and a correspondingly higher proportion employed in process plant, machine operative and elementary occupations (Groups 8–9). Whilst there are notable differences in the occupational profiles of individual wards within the study area, no significant changes to demographic characteristics or economic activity are anticipated.

that would materially alter the distribution of employment by occupation group or levels of economic activity from those recorded in the baseline.

- 15.5.52. The South-East Wales region is expected to remain an important tourism destination within Wales, accounting for a substantial proportion of visitor expenditure and visitor numbers. Domestic visitors, particularly those from England, are anticipated to continue to represent the largest component of the visitor market, whilst national, regional and local tourism strategies seek to strengthen the visitor economy and increase the attractiveness of Wales to international visitors. Although tourism demand may fluctuate in response to wider economic conditions, tourism is expected to continue to make an important contribution to economic activity and employment across BCBC, NPTCBC and RCTCBC throughout the assessment period.
- 15.5.53. With regards to land use, there are not expected to be marked changes in the short to medium term.

15.6 Embedded measures

- 15.6.1. A range of environmental measures have been embedded into the Proposed Development. **Table 15.11** outlines how these embedded measures will influence the socio-economics assessment.

Table 15.11 Summary of the embedded environmental measures

Receptor	Potential changes and effects	Embedded measures	Compliance mechanism
Construction			
Recreation - PRow users and Site traffic	Potential conflict between PRow users and Site traffic	Measures set out within the Outline Public Rights of Way Management Plan (PRowMP) (Appendix 12A) , which provides an overview of likely measures required to manage PRow, with the finalised measures provided within a full PRowMP.	Outline PRowMP) (Appendix 12A) secured by DNS condition.
Recreation– Access Land	Changes to access.	The Site will remain open for access. However, temporary measures, such as fencing of construction sites, will be required during construction to restrict access and ensure safety of potential users.	Outline Construction Environmental Management Plan (oCEMP) secured by DNS condition.
Operation			

Receptor	Potential changes and effects	Embedded measures	Compliance mechanism
Recreation - PRow users	Potential conflict with PRow users	Measures set out within the PRowWMP, the Outline PRowWMP (Appendix 12A) provides an overview of likely measures, the finalised measures will be provided within a full PRowWMP.	Outline Public Rights of Way Management Plan (PRowWMP) (Appendix 12A) secured by DNS condition.
Land use – Access Land	Changes to access	In the operational phase access will be permitted. No fencing etc will be used around the access roads or turbines that could limit access to the Site.	DNS condition.

15.7 Scope of the assessment

The Proposed Development

- 15.7.1. All the activities and consequent environmental changes associated with the construction, operation and decommissioning of the Proposed Development, as set out in **Chapter 4: Development Description** have been considered.

Spatial Scope

- 15.7.2. The spatial scope of the Socio-economics assessment covers the Development Site, together with the Zones of Influence (Zols) that have formed the basis of the study area described in **Section 15.4**.
- **Climate change and energy security** – the assessment covers the national (Wales) area as a whole;
 - **Economy and community** - the assessment covers Wales, BCBC, RCTCBC, NPTCBC and the wards identified.
 - **Tourism and recreation** – considers tourism at local (BCBC, NPTCBC and RCTCBC), regional (Southeast Wales) and national (Wales) level. The recreation baseline related to Public Rights of Way (PRow) has focussed on the local context within 5km as informed by the LVIA in Chapter 6;
 - **Land use** - considers the County Borough level.

Temporal Scope

- 15.7.3. The temporal scope of the assessment of the socio-economic effects is consistent with the period over which the development would be carried out and therefore covers the construction and operational periods. It is assumed that the construction would take approximately 22 months with the start of development (and therefore completion) dependent on the consenting timescales. The Proposed Development is designed for an

operational lifespan of 30 years. At the end of the operational period for the purposes of the assessment it is assumed that the wind farm would be decommissioned.

Potential Receptors

- 15.7.4. The principal socio-economics receptors that have been identified as being potentially subject to effects are summarised in **Table 15.12**.

Table 15.12 Socio-economics receptors subject to potential effects

Receptor	Reason for consideration
Climate change and energy security	The Proposed Development includes the provision of renewable energy which may have an effect on meeting targets for addressing climate change, renewable energy provision and energy security.
Economy and community	There is potential for effects through the provision of jobs and economic benefits for the local area.
Tourism and recreation	The Proposed Development has the potential for effects on the visitor economy and recreation, including the network of PRoWs within and close to the Site, and OAL.
Land use	The Proposed Development may have the potential to restrict the ability to access future mineral supplies.

Likely significant effects

- 15.7.5. The effects on socio-economics receptors which have the potential to be significant and have been taken forward for detailed assessment are summarised in **Table 15.13**.

Table 15.13 Summary of effects scoped into the Socio-economics assessment

Receptors/potential effects	Justification
Climate change and energy security – scoped in for operation	Delivery of national climate change mitigation targets and renewable energy generation targets.
Economic and community – scoped in for construction and operation	Potential job creation; impacts on expenditure within the local community, region and nationally; non-domestic rates and community benefits (with regard to operational phase only) accruing from the Proposed Development.
Tourism and recreation – Effects on the attractiveness of the area as a tourist destination – scoped in for construction and operation Impacts on PRoW – scoped in for construction and operation	Potential for impacts on tourism/visitor spend. Impacts on the use of PRoW that cross the Site for recreational purposes and use of OAL.
Land use – scoped in for construction and operation Potential impacts on mineral safeguarding	Potential impacts on mineral safeguarding.

- 15.7.6. The receptors/effects detailed in **Table 15.14** have been scoped out from further assessment because the potential effects are considered unlikely to be significant.

Table 15.14 Summary of effects scoped out of the Socio-economics assessment

Receptors/potential effects	Justification
Climate change and energy security – scoped out for construction	The construction phase will provide no contribution to achieving energy security. ES Appendix 2A: Carbon Balance Assessment considers the implications of construction for the carbon balance.
Decommissioning for all receptors	The effects at decommissioning would be no greater than those for construction and are therefore scoped out from further assessment.

15.8 Assessment methodology

- 15.8.1. The generic project-wide approach to the assessment methodology is set out in **Chapter 2: Approach to EIA**. However, whilst this has informed the approach that has been used in this socio-economics assessment, it is necessary to set out how this methodology has been applied, and adapted as appropriate, to address the specific needs of this socio-economics assessment.
- 15.8.2. As discussed in **Section 15.5**, the assessment methodology adopted is based on determining potential effects on the baseline conditions using knowledge gained from previous wind farm developments and using professional judgement. Where possible, the significance will be assessed by way of a comparison of the factor (e.g. construction jobs) with the variance of related factors within the local economy. Where effects cannot be quantified, the assessment of significance will be undertaken using professional judgement and experience.

Significance evaluation methodology

- 15.8.3. The EIA Regulations require that a final judgement is made about whether or not each effect is likely to be significant. The effects have been evaluated on the basis of a professional assessment of the magnitude of the effect and the value of the receptor or importance of the policy. In this assessment, effects are considered to be significant or not significant according to the matrix in **Table 15.15**.
- 15.8.4. In respect of the policy context the sensitivity definitions used for the socio-economic assessment are: National (Wales), Regional (Southeast Wales), County (BCBC, RCTCBC and NPTCBC) or local (within the wards identified in **paragraph 15.4.4**).

Climate Change and energy security

- 15.8.5. The impact on climate change and energy security is assessed in the context of applicable policy and targets. The significance is based on the magnitude of change towards achievement of the policies and targets that apply to Wales.

Economy and Community

- 15.8.6. Conclusions on potential effects are reached based upon the magnitude of the predicted change likely to occur to the baseline situation. The sensitivity of the receptor is a further consideration to be taken into account.

Tourism and Recreation

- 15.8.7. The effect on tourism has been assessed using surveys commissioned by a range of organisations into the public perception of wind turbines both in Wales and other parts of the UK. For this assessment, a 10km Study Area was drawn around the Proposed Development in order to identify the main tourist facilities and recreational locations that have the potential to be affected by the Proposed Development. Effects are most likely to result from the visual impact of the Proposed Development upon tourism receptors. The 10km Study Area is based upon the groups of PRoW, OAL, country parks, paths and trails, considered likely or certain to sustain significant visual effects because of operation of the proposed turbines as determined in the LVIA (**Chapter 6**). This is identified as a conservative buffer in the LVIA. Potential effects have been considered using professional judgement.

Land use

- 15.8.8. The effect on land uses has been assessed based upon the proportion of land directly or indirectly affected compared to the overall total available and the ability of landowners and occupiers to continue to use the land for its current purposes. With regard to minerals this includes consideration of the extent of safeguarding areas with the potential for the Proposed Development to affect the aims of this designation.
- 15.8.9. How this results in a predicted level of significance is set out within **Table 15.15**.

Table 15.15 Matrix of EIA significance

		Magnitude of change			
		High	Medium	Low	Very low
Sensitivity	High – Wales	Major (Significant)	Major (Significant)	Moderate (Significant)	Minor (Not significant)
	Medium – Regional level (Southeast Wales)	Major (Significant)	Moderate (Significant)	Minor (Not significant)	Negligible (Not significant)
	Low – County level (CBC)	Moderate (Significant)	Minor (Not significant)	Negligible (Not significant)	Negligible (Not significant)
	Very Low – local (within 10km)	Minor (Not significant)	Negligible (Not significant)	Negligible (Not significant)	Negligible (Not significant)

15.9 Assessment of Socio-economics effects: Climate Change and Energy Security

Predicted effects and their significance

Operation

- 15.9.1. The potential effects on climate change and energy security are confined to the operational phase of the Proposed Development.
- 15.9.2. The Proposed Development has an installed capacity of up to 33.6 MW dependent on the final turbine chosen. For the purposes of this assessment, a 4.2 MW turbine has been used. The annual generation for would be expected to supply the domestic electricity needs of approximately 22,468 average households.^{47,48}
- 15.9.3. In the context of national policy for greater renewable energy, the Proposed Development would make a positive contribution to the Welsh Government's overall target for renewable sources to generate 100% of consumed electrical power in 2035. In 2024, 54% of all electricity consumed in Wales originated from renewable sources (Welsh Government, 2026a). The Welsh Government (2026a: 2) states that due to the projected increase in electricity needs "*renewable generation must triple for Wales to meet its 2035 target.*"
- 15.9.4. Should the Proposed Development be approved, the 33.6 MW would provide a 56.9% increase in the total installed capacity of BCBC (where the Northern Array and Southern Array are located) based on Welsh Government (2026a) 2024 figures.
- 15.9.5. Welsh Government has set targets for local ownership of 1.5GW of renewable energy capacity to be in local ownership by 2035 and for new energy projects to have at least an element of local ownership (Welsh Government, 2023b). Wales is 66% of the way towards that target with 0.99GW in local ownership (Welsh Government, 2026a). The Applicant is a business registered in Wales and therefore meets the Welsh Government's definition of local ownership (Welsh Government, 2020⁴⁹). The Proposed Development would contribute to the Welsh Government's local ownership target.
- 15.9.6. The scale of the Proposed Development would go some way to meeting national wind energy priorities and help ensure that Wales moves towards net zero carbon in 2050,

⁴⁷ Figures are derived as follows: 33.6 MW (8 × 4.2MW turbine) × 8,760 hours/year × 0.26 (capacity factor) = 76,233 MWh

⁴⁸ DESNZ (2025). Regional and local authority electricity consumption statistics. Available at: <https://www.gov.uk/government/statistics/regional-and-local-authority-electricity-consumption-statistics> Homes Equivalent is calculated using the most recent statistics from the DESNZ showing that annual average domestic household consumption for Wales of 3,155 kWh: 76,233 / 3,155 kWh = 22,468 households.

⁴⁹ Welsh Government (2020) Policy Statement: Local ownership of energy generation in Wales – benefitting Wales today and for future generations. (Online) Available at: <https://gov.wales/sites/default/files/publications/2020-02/policy-statement-local-ownership-of-energy-generation-in-wales.pdf> ((Accessed Julu 2026). Page 2 defines local ownership "as energy installations, located in Wales, which are owned by one or more individuals or organisations wholly owned and based in Wales, or organisations whose principal headquarters are located in Wales."

which is a legal duty placed on Ministers under the Environment (Wales) Act 2016 (as amended). The Welsh Government is seeking to ensure 100% of its electricity needs are addressed by renewable energy sources by 2035, which the Proposed Development would aid in achieving.

- 15.9.7. The benefits would therefore include the strengthening of the nation's security of supply, the mitigation of climate change and ensuring a degree of local ownership in the nation's energy supply.
- 15.9.8. The Proposed Development is also relevant in the national and local policy context of action to tackle CO₂ emissions, with its potential to reduce the levels of CO₂ emitted to the air. **Table 15.16** shows how the proposed wind farm could reduce emissions going into the atmosphere by replacing that generated through non-renewable sources.

Table 15.16 Emissions to atmosphere if wind farm output replaces all non-renewable fuels

Emissions to atmosphere avoided (tonnes) ⁵⁰	Annual	Total (30 years)
Carbon dioxide (tCO ₂ e)	34,152	1,024,560

Note: Carbon dioxide is the main gas implicated in global warming.

- 15.9.9. Overall, the Proposed Development is considered to have a low magnitude of change on this high sensitivity receptor resulting in a **moderate beneficial (significant) effect**.

15.10 Assessment of Socio-economics effects: Economy and Community

Predicted effects and their significance

Construction – Employment and Expenditure

- 15.10.1. The total average construction phase cost for onshore wind farms in Wales has been estimated as £1.133m per MW of installed capacity (Regeneris Consulting Ltd and Welsh Economy Research Unit, 2013⁵¹). The construction of the Proposed Development could therefore involve an investment of approximately £38.1m (based on a maximum output of up to 33.6 MW) at 2012 prices.⁵² With inflation, current investment may be higher so

⁵⁰ Based on DESNZ (2025) Digest of UK Energy Statistics (Online). Available at: <https://www.gov.uk/government/statistics/electricity-chapter-5-digest-of-united-kingdom-energy-statistics-dukes> (Table 5.14) estimated carbon dioxide emissions per GWh of electricity supplied by all of non-renewable fuels of 448 tonnes per GWh of electricity supplied. Calculation is 76,233 MWh / 1,000 = 76.23 Gwh x 448 = 34,152 tonnes

⁵¹ Regeneris Consulting and the Welsh Economic Research Unit. Economic Opportunities for Wales from Future Onshore Wind Development 2013 (Online). Available via: <https://studylib.net/doc/18298357/economic-opportunities-for-wales-from-future-onshore-wind> Accessed June 2026.

⁵² Department of Energy Security and Net Zero (2025) Renewable Energy Generation Cost and Technical Assumptions – Onshore Wind and Solar PV Cost of Electricity Report Update 2024 estimates that capital expenditure for onshore ranges from £1.24m to £2.21m per MW. Using these figures would provide a slightly higher overall investment than the Regeneris study. The use of the lower figure effectively represents a worst case in that context. Report available via: <https://assets.publishing.service.gov.uk/media/68ba91f411b4ded2da19fe92/onshore-wind-and-solar-pv-cost-electricity-report-update-2024.pdf> (Accessed October 2025)

would still represent a conservative assessment. The study estimated that 35% of the development cost would remain in Wales equating to an estimated £13.3m expenditure in Wales during construction of the Proposed Development.

- 15.10.2. The construction phase would create the opportunity for direct economic benefits to Wales, and in particular the local authority areas of BCBC (hosting the Northern Array and Southern Array), NPTCBC and RCTCBC. The wider southeast region would also benefit from opportunities for local firms to bid for mechanical, electrical and civil engineering contracts. Criteria for selecting the wind turbine manufacturer and civil and electrical contractors would be based on price specifications and guarantees to ensure that performance and technical specifications are met in full.
- 15.10.3. The Regeneris Welsh Economic Research Unit Study 2013 recognises that across Wales it is the southeast region with its industrial base which is best suited to take advantage of the opportunities presented by projects such as the Proposed Development. Most of the jobs associated with the Proposed Development would occur in the construction phase and there is the strong potential for some of the work to be undertaken by local firms given that the Applicant is part of the wider Walters Group, a civil engineering company with significant experience in Welsh wind farm construction, headquartered in Hirwaun and with an extensive local supply chain.
- 15.10.4. The Proposed Development is expected to involve the creation of up to 57 FTE based upon employment density of approximately 1.7 direct FTE jobs per MW derived from Renewables UK (Working for a Green Britain, 2011⁵³), or 403 FTE direct, indirect and induced jobs during the construction and project development phase based upon research undertaken by Regeneris and the Welsh Economic Research Unit (2013). The socio-economic baseline identifies a number of communities within the Study Area which experience comparatively low levels of economic activity, higher unemployment rates and elevated levels of deprivation. The construction employment and supply chain opportunities associated with the Proposed Development would therefore provide a beneficial contribution to local economic activity and employment in the context of these existing socio-economic challenges.
- 15.10.5. Other indirect benefits to the local economy would come through an increased spend in bed and breakfast and other accommodation and the use of other local services and facilities during the construction phase. Additional expenditure associated with the use of local accommodation, hospitality and other services would provide further support to businesses operating within the local authority areas and surrounding communities.
- 15.10.6. Overall, the construction of the wind farm is likely to lead to a low impact on a medium sensitivity receptor equating to a **minor (not significant) beneficial** effect, as there is potential for economic benefit to local construction firms, quarries, accommodation establishments and other local services.
- 15.10.7. With regard to the decommissioning phase, although scoped out of the assessment, the level of employment generation and expenditure is anticipated to be substantially lower than during construction and would not exceed the magnitude of effects assessed for the construction phase. Decommissioning activities would be limited to the removal of

⁵³ Renewables UK (2011) Working for a Greener Britain 2011. Volume 1.
https://eprints.staffs.ac.uk/1689/1/Working_for_Green_Britain.pdf (Accessed July 2026).

infrastructure and site reinstatement, resulting in lower workforce requirements, reduced supply chain expenditure and a shorter duration of activity compared with construction. Any socio-economic effects would therefore be lower than those assessed for the construction phase and would not alter the conclusions of the assessment

Operation – Employment and Expenditure

- 15.10.8. It is expected that the Proposed Development would directly employ four FTE for maintenance during the operational phase. Their duties will include compliance with statutory environmental requirements. It has been estimated that the operation and maintenance of an onshore wind farm involves an average expenditure of £38,600 per MW per annum, with 76% of that expected to be retained in Wales (Regeneris Consulting Ltd and Welsh Economy Research Unit, 2013). For a scheme of up to 33.6 MW that would result in approximately £1,296,960 (£1.30m) of expenditure annually, with approximately £985,689 (£0.99m) being retained in Wales. Whilst the level of direct employment generated during operation would be limited, the creation of permanent jobs and ongoing expenditure retained within Wales would provide a small but positive contribution to economic activity within an area that contains communities experiencing relatively high levels of deprivation and lower economic participation. The operation of the wind farm is likely to have a very low impact on a medium sensitivity receptor resulting in a **negligible beneficial (not significant) effect** on employment and expenditure.

Operation – Business Rates

- 15.10.9. At present, all Non-Domestic Rates ('business rates') (NDR) are based on the rateable value of properties. The rates are collected by local authorities and are then given to the Welsh Government. The Welsh Government then redistributes the non-domestic rates pool across the 22 local authorities using a range of social and economic indicators. Therefore, the BCBC, RCTCBC and NPTCBC would see no direct financial benefit from the wind farm but would benefit indirectly via the redistribution of rates from Welsh Government. However, it is difficult to quantify any direct benefit that would accrue for each local authority. The operation of the Proposed Development is likely to have a very low impact on a low sensitivity receptor resulting in a **negligible (not significant) effect** on business rates.

Operation – Community Benefits

- 15.10.10. The Applicant is conscious of its role and the Proposed Development's role within the community and wishes to ensure that the local community shares some of the financial benefits of having the wind farm in the area. This will be implemented by a Community Fund, the mechanism for which is to be consulted on as part of this draft submission, with further detail set out in the accompanying Project Benefits Report, to be submitted with the final application. The Applicant has already provided some £4m in payments to qualifying projects within Wales⁵⁴. The operation of the wind farm is likely to have a high impact on a very low sensitivity receptor resulting in a **minor beneficial (not significant) effect**.

⁵⁴ See <https://pennantwalters.co.uk/> for details of community funds provided to other schemes.

15.11 Assessment of Socio-economics effects: Tourism and Recreation

Predicted effects and their significance

Construction

- 15.11.1. As outlined in **Section 15.6**, there will be a requirement for measures to address any effects on these PRowWs. These measures are set out in the **Outline PRowWMP (Appendix 12A)** including via appropriate management and temporary closures (where necessary). There is potential for some disruption to the PRowWs, although the measures identified should reduce the likelihood of any significant issues for users.
- 15.11.2. Indirect effects resulting from the construction activities, such as the use of the local highway network for deliveries which could potentially affect visitors travelling to the area, are discussed within **Chapter 12: Traffic and Transport**.
- 15.11.3. It is concluded that the Proposed Development would have a medium impact on a low sensitivity receptor resulting in a **negligible (not significant) adverse** effect upon tourism and recreation in the construction phase.

Operation

- 15.11.4. The **Outline PRowWMP (Appendix 12A)** confirms that no turbines would be located on PRowWs and no permanent diversions or closures of PRowWs are proposed during the operational phase of the Proposed Development are currently proposed. The existing PRowW network and areas of OAL would therefore remain available for recreational use during operation.
- 15.11.5. The operational presence of turbines may influence the recreational experience of some users of PRowWs and OAL, particularly on sections of routes located close to turbine positions. British Horse Society (2025)⁵⁵ guidance identifies a recommended separation distance between turbines and equestrian routes equivalent to blade tip height plus 10%, equating to approximately 198 m for the proposed turbines. Whilst two bridleway PRowWs are located within this distance (GWV/30/1 – 90m from turbine 6 and 160m from turbine 7 and GWV/30/3 – 150m from turbine 6), there would be no turbine oversail of any PRowW. The guidance also notes that responses to turbines can vary between horses and riders and that familiarisation may occur over time.
- 15.11.6. As access to the PRowW network and OAL would be maintained throughout operation, and any effects would be limited to localised changes in the recreational experience of users on relatively short sections of routes, there would be no significant effects on these receptors.

⁵⁵ The British Horse Society (2025) Advice on Wind turbines and equestrian access. Available via: <https://www.bhs.org.uk/media/lqwdbphr/wind-turbines-0525.pdf> (Accessed July 2026)

- 15.11.7. Visual effects upon PRow users have been assessed in the LVIA (**Chapter 6**). The assessment considered PRowS and OAL within the Site, and within 10km of the turbine locations.
- 15.11.8. The Proposed Development would not restrict people's rights to access the Open Access Land with no fencing etc around the development to restrict access.
- 15.11.9. Visual effects on tourism and recreational receptors have been assessed in the LVIA (**Chapter 6**, and **Appendix 6L**). Based on the LVIA findings, the assessment has concluded that significant visual effects would be experienced from:
- Sections of promoted long distance recreational routes, including Bridgend Circular Walk, Celtic Way, Cistercian Way (Wales), Coed Morgannwg Way, Glamorgan Ridgeway Walk, Taith Fford Las Ogwr/ Ogwr Ridgeway Walk, Sky to Sea: Over the Bwlch, Sky to Sea: Through the Vale, St Illtyd's Walk.
 - From localised sections of National Cycle Network (NCN) route 885.
 - One outdoor recreational destination: Bryngarw Country Park.
 - Several PRowS and within areas of OAL within 10 km of the proposed turbines. There would be no significant visual effects beyond 10 km. Effects within the Site are assessed as being significant given the proximity of the wind turbines.
- 15.11.10. Effects on heritage assets that may contribute to the tourism resource are considered in **Chapter 7: Historic Environment**. No significant effects on heritage assets have been identified in the assessment. There is no possibility for any shadow flicker effects on tourist accommodation (mitigation has been identified for residential receptors in **Chapter 14: Shadow Flicker**).
- 15.11.11. A number of studies have in the past been commissioned into the potential effects of wind turbines upon tourists and have demonstrated that the effect of wind farms on tourism is negligible at worst, with many respondents taking a positive view to wind farms. For example, studies undertaken in Scotland and published in 2021 found no correlation between a decrease in tourism numbers and the presence of wind farms, looking at 44 case studies.⁵⁶
- 15.11.12. With direct reference to Wales, a survey commissioned for RenewableUK Cymru (YouGov, 2013)⁵⁷ found 64% of respondents in Wales supported the development of wind power in their local area. For South-East Wales, this was higher at 74%. The survey also found that 65% of people said a wind farm would not put them off visiting an area whilst only 26% suggested that it might dissuade them. For South-East Wales, these figures stood at 72% and 19% respectively.
- 15.11.13. Furthermore, a 2014 study for Welsh Government (Regeneris Consulting and The Tourism Company for Welsh Government, 2014)⁵⁸ regarding the impact of wind farms and their associated grid infrastructure on the Welsh tourism sector, found that there is:

⁵⁶ Biggar Economics (2021 Wind Farms & Tourism Trends in Scotland: Evidence from 44 Wind Farms <https://biggareconomics.co.uk/wp-content/uploads/2021/11/BigGAR-Economics-Wind-Farms-and-Tourism-2021.pdf> (Accessed July 2026)

⁵⁷ YouGov (2013) YouGov RenewableUK Cymru Poll Results. Commissioned by RenewableUK Cymru

⁵⁸ Regeneris Consulting and The Tourism Company for Welsh Government (2014) Study into the Potential Economic Impact of Wind Farms and Associated Grid Infrastructure on the Welsh Tourism Sector (Online) Available at: https://gov.wales/sites/default/files/publications/2019-06/potential-economic-impact-of-wind-farms-on-welsh-tourism_0.pdf (Accessed July 2026).

- A negligible impact on the national tourism sector from wind farms;
 - Limited evidence of local tourism impacts to date;
 - A clear majority of people that do not react negatively to wind farm developments or change their visiting behaviour as a result;
 - Complex reactions to wind farms which may change over time;
 - Higher sensitivity to wind farms for certain visitor markets;
 - Some potential for positive impacts, often requiring further investment;
 - No evidence that wind farms on visitor routes deter tourists; and
 - No negative impacts during construction.
- 15.11.14. The study found that there was no evidence of significant impacts on tourism to date in areas where wind farms have had an established presence for a number of years (Powys, Anglesey and the South Wales Valleys). Overall, there is no evidence to suggest that the tourism industry has been affected by wind farms operating in Wales or across the UK. Additionally, no significant effects have been identified on any cultural heritage assets that might support the tourism resource of the area (see **Chapter 7: Historic Environment**). It is concluded that the Proposed Development would not have a significant adverse effect upon the local tourism industry or recreational routes.
- 15.11.15. Overall, there is no evidence to suggest that the tourism (and recreation) industry has been affected by wind farms operating in Wales or across the UK.
- 15.11.16. It is concluded that the Proposed Development would have a medium impact on a low sensitivity receptor equating to a **minor (not significant) effect** upon tourism and recreation in the operational phase.

15.12 Assessment of Socio-economics effects: Land Use

Predicted effects and their significance

Construction and Operation - Minerals

- 15.12.1. The Northern Array and Southern Array, and forestry access track between them, are located within BCBC mineral safeguarding area for sandstone. The safeguarding area extends across most of the northern half of the BCBC area (north of the M4) outside of settlements. The safeguarding designation is therefore applied across a very extensive area, rather than a discrete mineral reserve or allocated quarry. The forestry access track to A4061 Rhigos Road is partially within a safeguarding area for sandstone and coal within the NPTCBC area and for sandstone within the RCTCBC area.
- 15.12.2. The land where the Proposed Development would be sited represents a tiny fraction of the overall safeguarded area within the CCBC area (Northern array: 70.5 ha; Southern Array: 101.4 ha, forestry access track between the Northern Array and Southern array: 5.2 ha. There is 203.5 ha within the Site Boundary as a whole, including the existing forestry access track between the Northern Array and Southern Array and that providing access to the wider public highway at the A4061 Rhigos Road). The total area of built development

that would be required for the Proposed Development would be substantially lower (**Chapter 11: Ground Conditions** estimates the maximum area of potential permanent loss, displacement or sealing of soil associated with the Proposed Development is estimated to be 10.52 ha). With regards to the forestry access track located in RCTCBC and NPTCBC, there would be negligible impacts on safeguarding as any works required at worst would be minor road widening.

- 15.12.3. Furthermore, the Proposed Development has a finite life of 30 years at which point it may be decommissioned. Minerals would not therefore be sterilised permanently over the vast majority of the Northern Array and Southern Array part of the Site.
- 15.12.4. Given that the land upon which the Proposed Development would be located presents a very small part of the substantial areas of land safeguarded for mineral extraction, the effects arising from its construction and operation would have a very low impact on a low sensitivity receptor resulting in a **negligible (not significant) adverse effect**.

15.13 Assessment of cumulative (inter-project) effects

- 15.13.1. A cumulative effects assessment (CEA) has been undertaken for the Proposed Development which considers the combined impacts with other developments on the same single receptor or resource (inter-project effects). The detailed method followed in identifying and assessing potential cumulative effects is set out in **Chapter 2**.
- 15.13.2. Consideration has been given as to whether any of the socio-economic receptors that have been taken forward for assessment in this chapter are likely to be subject to cumulative socio-economic effects because of socio-economic effects generated by other developments.

Overview

- 15.13.3. The socio-economic cumulative assessment is concerned with the evaluation of the effects that could be generated were the Proposed Development to be constructed and operational along with other developments in the area.

Cumulative socio-economic effects

- 15.13.4. Cumulative effects can arise from the construction and operation of other wind farms, which can lead to cumulative economic, energy security and climate change benefits. The Proposed Development is located within 20km of four Development of National Significance (DNS) wind farm applications which are consented and potentially have overlapping construction phases:
- Upper Ogmere – Wind Turbines (7 turbines, consented);
 - Y Bryn Wind Farm (18 turbines, under judicial review);
 - Mynydd Y Glyn Wind Farm (7 turbines, consented);
 - Mynydd Fforch Dwm Wind Farm (up to 6 wind turbines and 10 ha of solar PV panels); and
 - Twyn Hywel Wind Farm (14 turbines, consented).

- 15.13.5. The following four proposed DNS wind farm applications are also either submitted or at scoping stage within 20km:
- Mynydd y Gaer (11 turbines, under consideration);
 - Llanwonno Wind Farm (8 turbines, solar PV, under consideration);
 - Carreg Wind Farm Aberdare (19 turbines, scoping); and
 - Hirfynydd Renewable Energy Park (unknown number of turbines at this stage, solar PV, scoping).
- 15.13.6. Additionally, there are number of consented windfarms including Foel Trawsant (11 turbines and (2.8km from the Site).
- 15.13.7. These projects, in addition to consented solar PV projects at Mynydd Emroch Solar Farm (DNS CAS-02430-B1L0D2) and Ty'n Y Waun Solar (DNS/3279521) would contribute further to achievement of the Welsh Government's target for increasing the amount of electrical power generated by renewable means. The development of the Proposed Development along with some or all of these proposed developments would lead to an additional local and regional impact on the economy, which would be beneficial during construction and operation for:
- Employment (directly and indirectly); and
 - The related industries of wind/solar energy and the supply chain.
- 15.13.8. Also, it is likely that local communities within the area would benefit from the generation of community funds.
- 15.13.9. With regard to mineral sterilisation, substantial areas of the relevant local authority areas are identified for mineral safeguarding, including sandstone resources. This includes land associated with other wind energy developments, including Mynydd y Glyn and Mynydd y Gaer. However, wind farm development is temporary in nature, with an operational lifespan of up to 30 years, after which infrastructure can be removed and the land reinstated. Long-term access to the safeguarded mineral resource would therefore remain possible.
- 15.13.10. The cumulative visual effects could dissuade visitors from visiting the area and therefore impact on tourism and recreation. Table 6.7 of the LVIA (**Chapter 6**) sets out the wind turbine developments that are proposed, consented or operational within the area that have been included in the cumulative assessment of visual effects on recreational receptors. The effects are assessed in Section 6.15.
- 15.13.11. The cumulative assessment considers where a magnitude of change could potentially result in a cumulative visual effect that would be significant with the Proposed Development's turbines present that would otherwise be not significant if the Proposed Development's turbines were not to become operational. The key consideration is the additional or incremental effect that would be generated by the introduction of the Proposed Development. The LVIA's cumulative assessment is informed by two scenario-based assessments⁵⁹.

⁵⁹ The Chapter LVIA cumulative assessment is based on two development scenarios as described in Chapter 6 Section 6.13: Scenario One includes other existing (and under construction) and consented wind energy developments, and Scenario Two includes other existing (and under construction), consented and proposed (subject of a formal DNS application and Scoping Opinion) wind energy developments.

- 15.13.12. Under Scenario One, taking into account operational and consented wind energy schemes, the LVIA concludes that there is no potential for the addition of the Proposed Development to result in significant visual effects where these would not arise in relation to either the Proposed Development alone, or arise in relation to one or more of the other wind energy schemes alone, or in combination.
- 15.13.13. Under Scenario Two (the worst case scenario as in reality not all developments may be granted planning consent), the additional contribution of other proposed wind energy schemes to the overall magnitude of turbines visible from recreational receptors (parts of promoted footpaths and recreational open space predicted to experience Moderate and not significant or Moderate/Minor levels of visual effect) is frequently significant and the addition of the Proposed Development would typically only reinforce an already significant visual effect or make no contribution to a significant visual effect.
- 15.13.14. Therefore, under both scenarios the visual effects on recreational receptors finds that there are no additional significant effects to those identified for the Proposed Development by itself (as considered in **Section 15.11**). Cumulative, significant visual effects could potentially dissuade recreational users from walking the routes identified. However, the research reported in **Section 15.11** suggests that the response of tourists and visitors to onshore wind farms developments is neutral at worst. In conclusion, cumulative socio-economic effects are considered to be not significant.

15.14 Significance conclusions

- 15.14.1. A summary of the results of the socio-economics assessment is provided in **Table 15.17**.

Table 15.17 Preliminary summary of significance of effects

Receptor and summary of predicted effects	Sensitivity / importance / value of receptor ¹	Magnitude of change ²	Significance ³	Summary rationale
Climate change and energy security – operational phase	High	Low	Moderate beneficial (Significant)	Based on the current turbine model, the Proposed Development would provide 33.6MW of electricity which is enough to power around 37,026 homes. The installation of 33.6MW represents a considerable increase in installed capacity within the BCBC area (where the Northern Array and Southern Array are located) and would contribute to the achievement of the Welsh Government's target to meet 100% of its electricity needs from renewable sources by 2035, for which Welsh Government estimates a tripling of generation by renewable sources is required; and the target for 1.5 GW of energy to be in local ownership by 2035 (currently standing at 66%).
Economy and community: employment and expenditure – construction phase	Medium	Low	Minor beneficial (Not Significant)	Positive contribution to the Welsh economy with potential investment of £13.3m during the construction phase. Much of this spend would take place in the region. Creation of up to 403 FTE direct, indirect and induced jobs would be expected in the construction phase.
Economy and community: employment and expenditure – operational phase	Medium	Very low	Negligible (Not Significant)	Expenditure of approximately £0.99m in the Welsh economy. Expected ongoing employment of around four FTE.
Economy and community: non domestic rates – operational phase	Low	Very Low	Negligible (Not significant)	There is potential for boosts to BCBC, RCTCBC and NPTCBC funds from redistribution of increased business rate funds via the redistribution of funds by Welsh Government.
Economy and community: community benefits – operational phase	Very Low	High	Minor beneficial (Not significant)	The Proposed Development would be accompanied by a proportionate community fund package.
Tourism and recreation - construction	Very Low	Medium	Negligible (Not significant)	A number of PRoWs cross the Site, whilst the Northern Array includes OAL. The implementation of suitable environmental

Receptor and summary of predicted effects	Sensitivity / importance / value of receptor ¹	Magnitude of change ²	Significance ³	Summary rationale
				measures as outlined in Table 15.11 including the Outline PProWMP would ensure no significant effects are experienced by receptors.
Tourism and recreation – operational phase	Low	Medium	Minor (Not significant)	There would be some impact on the existing PProWs. However, the embedded environmental measures would ensure that the user experience is not significantly impacted. There would be some visual impact on some locations of existing recreational receptors including regional paths, open spaces and country parks. However, overall, given that studies suggest that wind turbines do not dissuade visitors, no significant effects are assessed.
Land use – minerals – construction and operational phase	Low	Very Low	Negligible (Not significant)	A sandstone safeguarding area covers much of the northern part of the BCBC area. The area of land occupied as a proportion of the whole sandstone safeguarding area is substantially small in comparison (Northern array: 70.5 ha; Southern Array: 101.4 ha, forestry access track between the Northern Array and Southern array: 5.2 ha). The wind farm is a temporary development (albeit with a lifespan of 30 years) with permanent built development required substantially smaller than the overall red line boundary. Minerals would not therefore be sterilised permanently over the vast majority of the Northern Array and Southern Array part of the Site. With regards to the forestry access track located in RCTCBC and NPTCBC, there would be negligible impacts on any safeguarding as any works required at worst would be minor road widening.

1. The sensitivity/importance/value of a receptor is defined using the criteria set out in Section 15.8 and is defined as very low (local), low (county), medium (regional) and high (national).
2. The magnitude of change on a receptor resulting from activities relating to the development is defined using the criteria set out in Section 15.8 and is defined as very low, low, medium, and high.

3. The significance of the environmental effects is based on the combination of the sensitivity/importance/value of a receptor and the magnitude of change and is expressed as major (significant), moderate (potentially significant) or minor/negligible (not significant), subject to the evaluation methodology outlined in Section 15.8.

15.15 Further work to be undertaken

- 15.15.1. The information provided in this Draft ES is based on the currently available information. The final ES will be informed by consultation with officers of the CBCs to seek agreement on the relevant businesses, communities, tourism and recreational receptors considered. However, no significant effects have been identified in relation to these receptors.