



Tourism Survey – Mid Wales Connection

AUGUST TO SEPTEMBER 2014

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Mid Wales Connection

A survey of visitors to the Mid Wales and Shropshire region to assess the potential impact that introduction of a power line that is approx 54km long with a mixture of pylons, overhead lines and underground cables and a new sub-station.

1. Introduction – background to the scheme
2. Requirement for the survey undertaken
3. Objective of the survey
4. Survey locations / approach
5. Results of the survey
6. Next steps

Bryony Cunningham (Jacobs)

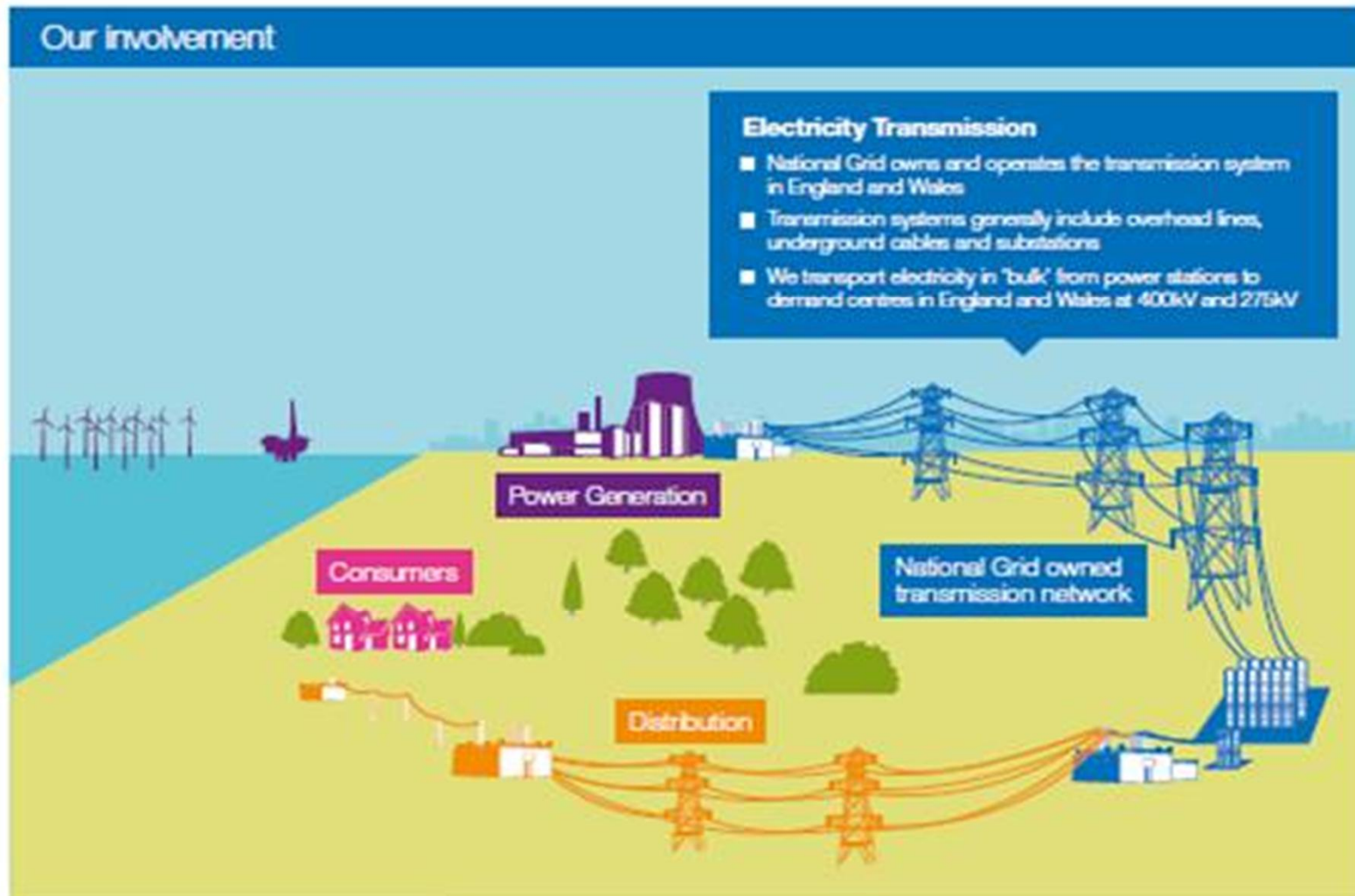
Jacqui Fenn (National Grid)

Project Introduction (1/6)

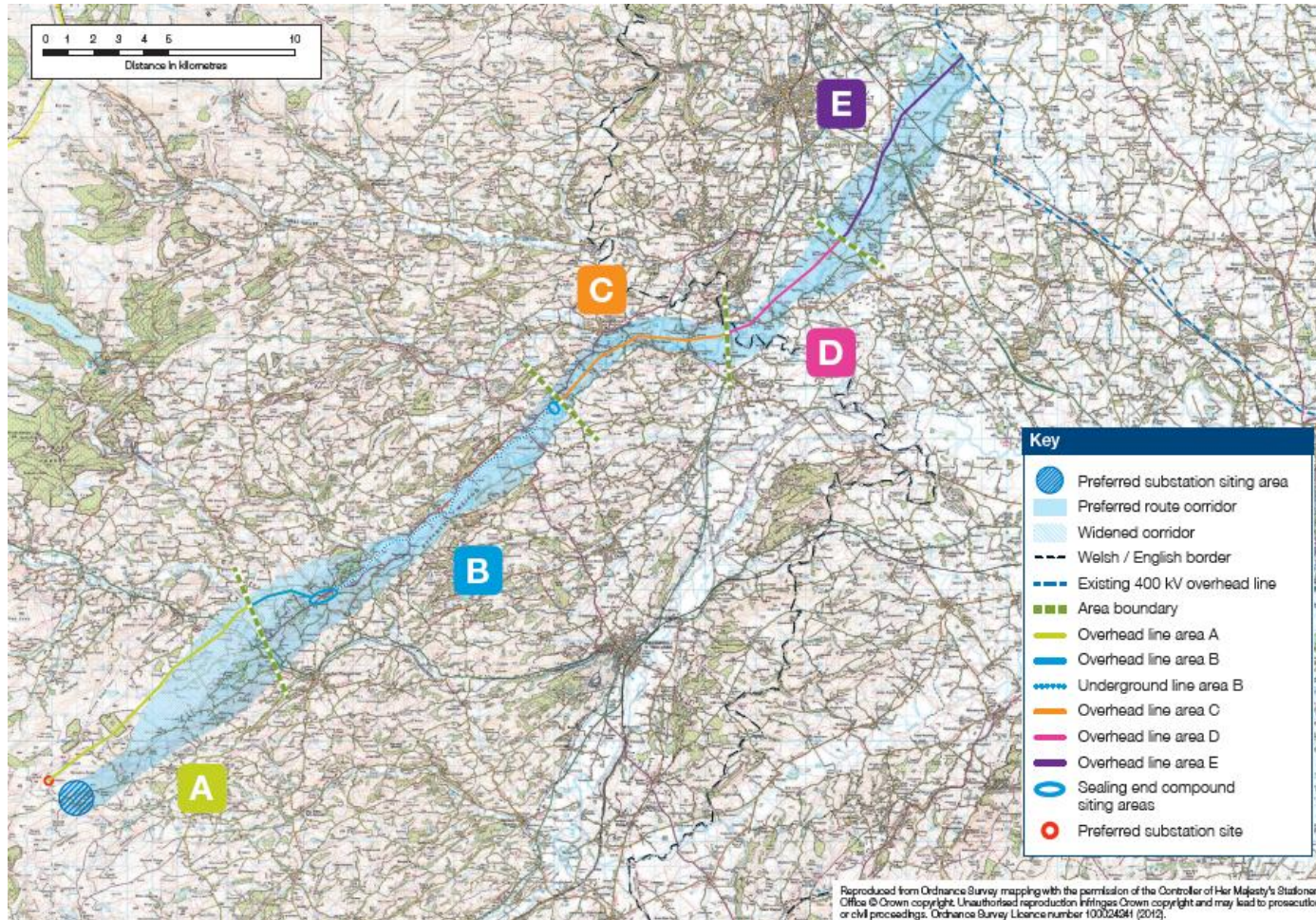
A number of Strategic Search Areas (SSAs) were identified within Welsh policy (TAN8) as being locations that are suitable for the consideration of onshore wind farm developments. National Grid has a statutory duty to develop and maintain an efficient, coordinated and economical system of electricity transmission under section 9 of the Electricity Act. A number of wind farm applications have been made throughout the mid Wales area (within the SSAs) and National Grid has a requirement to offer connections to these wind farms to allow connection to the network infrastructure (and ultimately to the end customers).



National Grid's Role (2/6)



Draft Route (3/6)



Underground and Overhead (4/6)

- ❑ 8 mile section in the Meifod Valley due to impact of pylons in this area
- ❑ Underground connection requires 'sealing ends'
- ❑ Overhead in other areas – believe we can manage impacts through careful routeing
- ❑ Point identified for connection to existing line in Shropshire



Substation (5/6)

- ❑ Substation site is north west of the original siting area
 - secluded
 - away from villages and main road
 - close to wind farms
 - offers good options for screening
- ❑ The site introduces a route option slightly outside, but parallel to the original corridor for about four miles – further away from villages in the area



Project Timeline (6/6)

Timeline	
DATE	ACTIVITIES
2013	Further consultation and assessments to develop the final draft design for the connection and substation
2014	Final draft design presented for feedback
2015	Consent applications submitted
2016	Consent applications to be decided
2017 - 2019	Construction

Requirements for a Survey

- Environmental Impact Assessment report required to submit with the application for consent;
- Range of technical issues to be covered including transport, ecology, visual, land assessment and socio-economics;
- The socio-economic assessment is looking at whether introduction of the scheme will have a significant impact on the local population, via investigation of a number of issues including:
 - **Impact on tourism;**
 - Access to PRow and for recreation purposes (cycling, bird-watching etc);
 - Landscape and visual issues from a socio-economic perspective;
 - Impact on forestry / land take;
 - Access to residential properties;
 - Employment generation (direct and indirect); and
 - Supply chain impacts.

Objectives of Survey

- Determine frequency and reasons for visiting the area;
- Explore activities that visitors are taking part in
- Evaluate estimated spend in the area during their visit
- Gauge the likelihood of visitors returning the area in the future
- Awareness of pylons, power lines and sub-stations and impact of visitors' enjoyment of their visit;
- Levels of awareness of the Mid Wales Connection Project and sources of awareness;
- Perceptions of how the construction of pylons, power lines and substations will impact on the local environment
- Impact of these structures on visitors' intentions to visit the area again, and whether they will have any effect on the activities undertaken

Survey Locations

- A total of 986 face-to-face interviews were conducted with visitors to 25 locations



Campsites

Henllan Caravan Park	Powys
Pentrego Farm	Powys
Strawberry Skies Yurts	Powys
Brook House Farm	Shropshire
Hafod Motor Home	Shropshire
Oswestry Camping and Caravanning	Shropshire
Spring Heath Fishery Certificated	Shropshire
Weston Pools Village	Shropshire

Attractions

Lake Vyrnwy	Powys
Pontycysllyte Aqueduct	Powys
Powis Castle	Powys
Welshpool & Llanfair Light Railway	Powys
Cambrian Heritage Railways and Museum	Shropshire
Ellesmere	Shropshire
Oswestry Town Museum	Shropshire
Oswestry Visitor and Exhibition Centre	Shropshire
Park Hall Farm	Shropshire
Whittington Castle	Shropshire

Public Rights of Way

Dolanog Car Park	Powys
Llanfair-Caereinion Car Park	Powys
Criggion Car Park	Shropshire
Offa's Dyke Car Park (at Llanymynech)	Shropshire
West Felton Car Park	Shropshire

Transient Locations

Cwpan Pinc - café at Llangadfan (A458)	Powys
Station at Welshpool (A483/A485)	Powys

Survey Results (1/3)

986 completed questionnaires:

- 176 questionnaires returned from campsite surveys (18%);
- 447 questionnaires returned from tourist attractions (45%);
- 232 questionnaires returned from rights of way locations (24%); and
- 131 questionnaires returned from transient locations (for example garages on major tourist routes) (13%).

Survey Results (2/3)

Preliminary findings – final report available in the future

The results highlight the following:

- 32% of people interviewed were visitors to the area that included at least an overnight stay, 35% were local residents or lived nearby to the point of interview;
- For 29% of people it was the first time they had visited the area with 35% of respondents undertaking outdoor activities (including examples such as walking, horse-riding and fishing);
- 47% responded that money spent during during their visit that day would predominantly be on eating and drinking;

Survey Results (3/3)

- 64% expressed concern that the introduction of pylons, a substation and overhead lines would have a negative impact on the landscape;
- 21% responded they were concerned disruption from construction could cause an issue. Landscape impacts and construction traffic are the two most important aspects to respondents from a tourism perspective;
- In terms of the presence of pylons, overhead lines, a substation and Sealing End Compounds (SECs) within the area, 80% of respondents whose results have been analysed to date answered that it will make no difference to the type and frequency of activities they undertake within the area; and
- 88% replied that the presence of these would not affect the spend they would undertake within the area.

Next Steps

- Complete analysis of survey results
- About to start a business survey (that includes hotels, B&B owners);
- Results of the survey will feed into the technical assessment of socio-economic assessment for the EIA process.

Thank you for your attention, any questions?

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