APPENDIX 6-1

TOURISM IMPACT ASSESSMENT

REPUCON
CONSULTING

TOURISM IMPACT ASSESSMENT

Sceirde Rocks Offshore Windfarm

December 2024

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Executive Summary

The Sceirde Rocks Offshore Windfarm (OFW) is being developed by Corio Generation through the Irish and Gaeltacht based company Fuinneamh Sceirde Teoranta (FST). It will be one of the largest ever infrastructure projects in the Connemara region. Located approximately 5km off the coast, it is expected to become the first commercial-scale OWF on Europe's Atlantic margin.

As part of the project planning and development process Corio Generation commissioned Repucon Consulting to undertake an independent tourism impact assessment of the proposed Sceirde Rocks OWF in Connemara. The project methodology adopted the V.I.C.E[1]. model for sustainable tourism as the framework for the analysis and research in line with Fáilte Ireland's approach to destination development. The consultations and subsequent research within this assessment focuses solely on the potential tourism impact of the Sceirde Rocks Windfarm project on the area. The project methodology employed in the assessment included;

- A total of 19 in-depth interviews with representatives of local communities and members of the tourism industry in Connemara.
- 212 interviews with domestic and international visitors to Connemara conducted in June 2024 at number of coastal locations.
- Socio-economic profiling of the area based on most recent census data available through the CSO.
- Research based on the experiences of comparable tourism destinations with Offshore Wind Farms (OWF) developed within the coastal area.
- Examination of available research on OWF and their impact tourism in Ireland.
- Development of a range of economic impact scenarios based on visitor feedback and potential investment scenarios arising from the Community Benefit Fund.

Tourism is a key economic sector for the Connemara area and it represents one of the most unique and authentic tourism destinations along the Wild Atlantic Way. As a tourism destination, Connemara has benefitted significantly over the course of the ten years since the launch of the Fáilte Ireland regional brand. It has become a tourism focal point for both domestic and international visitors and a must do experience along the Wild Atlantic Way touring route.

Galway continues to perform as one of the top tourism performing counties on the WAW. Galway city acts as a hub for visitors to explore the Connemara destination while Connemara in its own right has developed a significant share of the overnight visitor market. According to the latest Fáilte Ireland tourism performance data County Galway attracts in the region of 984,000 domestic trips and 1.7 million overseas visitors annually, contributing €754 million in tourism expenditure[5]. The key markets for the area are Britain, Mainland Europe, and North America.

Connemara has proven to be particularly popular within these source markets. In addition to the appeal of the area for fully independent travellers (FIT) the destination features strongly on group tour programmes. Annual tourism performance at a local level is not available but the performance of top visitor tourist attractions provides some context to the appeal of the area. Connemara National Park welcomes more than 250,000 visitors annually while Kylemore Abbey & Garden attracts in excess of 400,000 visitors. In the context of the outdoors there are at least twenty activity operators in Connemara delivering coastal tourism activities or guided tour experiences.

Based on the research and analysis, the development of the Sceirde Rocks OFW will not have an adverse impact on tourism. The visitor research does not suggest an OFW located off the Connemara coast will be detrimental to tourism in the area. Tourism industry and community feedback, specific to the likely tourism impact, recognise the tourism development opportunity it represents for the area. The independent visitor research clearly demonstrates minimal impact of OWF on visitors' decision to visit an area or how they perceive a coastal tourism destination. The majority of visitors indicated the existence of an OWF would not impact on their experience of the Connemara area. At every stage of the 'visitor journey' from pre-visit to the 'in destination' experience, the development of an OWF would not appear to have any negative impact on the tourism sector. 85% of those surveyed stated the presence of an OWF off the Connemara coast would not prevent them from considering Connemara as a place to visit. The majority of visitors felt the presence of OWF would have neither a negative or positive impact on the local tourism industry. One third of respondents felt it would have a positive impact compared to 11% who suggested it might have a negative impact.

Previous research conducted in Ireland and overseas suggests the impact of OWF’s on tourism destinations is relatively benign, and in some cases positive. In many locations as illustrated throughout the international examples, OWF’s have emerged as tourism attractions in their own by virtue of their modern and innovative design. The findings of the research examined suggest OWF’s do not impact on coastal areas as tourism destinations. The results of Irish studies mirror the findings of the primary research conducted within this assessment process. The 2024 Repucon Consulting research suggests the majority of visitors to Connemara would not avoid visiting the destination due to the presence of an offshore wind farm while the majority of visitors would consider Connemara to be a more sustainable destination due to the existence of an OWF.

The evidence of the research and consultations suggest no negative tourism impact on south Connemara. The tourism impact assessment is based on a holistic approach that included the views of the visitor, tourism industry and local community. At a destination level, the feedback suggests the development of an OWF could contribute to growing the value of tourism in the area while also increasing the area's profile as a sustainable tourism destination. From a supply side, the tourism industry feedback suggests a possible uplift in new tourism enterprise based on the OWF. This includes activity providers, development of a visitor attraction to the OWF theme and a growth in local bedstock to accommodate the business tourism opportunity during construction.

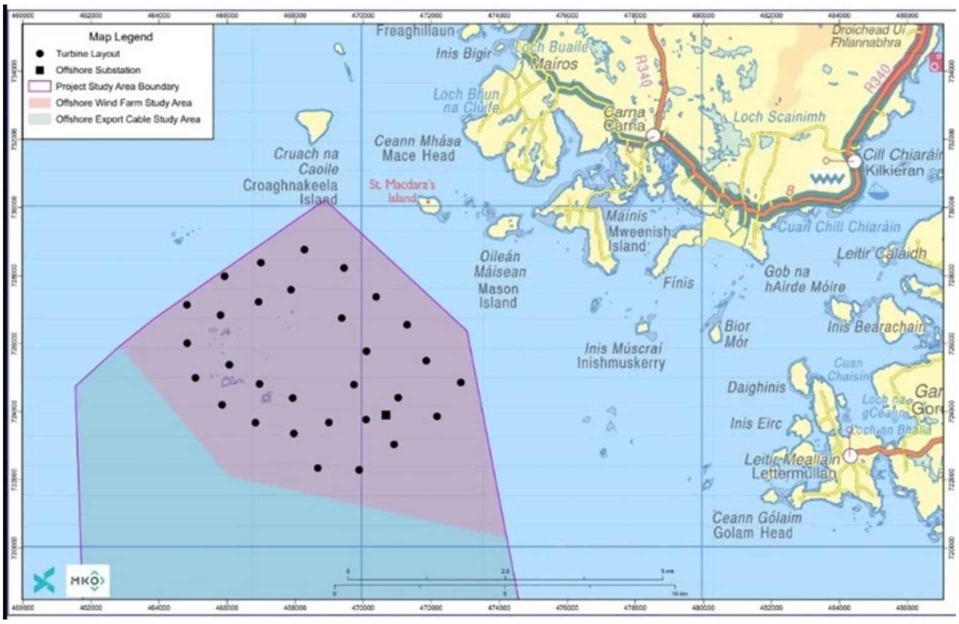
From a visitor demand perspective, the research has clearly demonstrated that there is minimal risk to annual tourism performance. Visitors were not concerned about the impact of OWF while a reasonable proportion of domestic and international visitors suggest it could enhance the appeal of the area. Overall, the international research combined with the local consultations and visitor sentiment would suggest the tourism performance of south Connemara will not be affected with no adverse tourism impact in the short to long term.

SECTION ONE

Introduction and Overview

1.1 Overview

The Sceirde Rocks Windfarm is being developed by Corio Generation through the Irish and Gaeltacht based company Fuinneamh Sceirde Teoranta (FST). It will be one of the largest ever infrastructure projects in the Connemara region. Located approximately 5km off the coast, it is expected to become the first commercial-scale OWF on Europe's Atlantic margin. Once complete, the Sceirde Rocks Offshore Windfarm (OWF) will provide enough reliable and affordable electricity to power more than 350,000 homes. It will provide a renewable energy source that will power local communities and help Ireland to increase its share of renewables to 80% by 2030.



(source: www.sceirderockswindfarm.ie)

The Sceirde Rocks OWF team is committed to working with the local community and all relevant stakeholders. An extensive programme of community consultation and public engagement is being undertaken in line with all phases of the project. The aims of the project are to contribute to the future development of the area by providing job opportunities and economic development for local communities in Connemara, enable opportunities for communities, businesses, and individuals to develop and progress, and to strengthen and support cultural economic and community infrastructure in the Gaeltacht area[2].

Tourism is a key economic sector for the Connemara area. It represents a signature destination for the Wild Atlantic Way regional brand with strong appeal to both domestic and international visitors. As part of the project planning and development process Corio Generation commissioned Repucon Consulting to undertake an independent tourism impact assessment of the proposed Sceirde Rocks OWF in Connemara.

1.2 Methodology

The project methodology adopted the V.I.C.E[1]. model for sustainable tourism as the framework for the analysis and research in line with Fáilte Ireland's approach to destination development. The consultations and subsequent research within this assessment focuses solely on the potential tourism impact of the Sceirde Rocks Windfarm project on the area. The project methodology employed in the assessment included;

- A total of 19 in-depth interviews with representatives of local communities and members of the tourism industry in Connemara.

- 212 Interviews with domestic and international visitors to Connemara at weekends and during midweek in June 2024. The interviews were conducted in Carna, Carraroe and Rosaveel with visitors who were visiting coastal areas of south Connemara and the Aran Islands. The interviews were conducted using a questionnaire containing a mix of open ended and closed questions. The questions contained within the survey are based on similar questions used in a number of the international research papers used. They are also consistent previous visitor attitude research conducted in Ireland relating to OFW and their impact on their tourism experience.
- Socio-economic analysis and profiling of the area based on most recent census data available through the CSO.
- Secondary research based on the experiences of comparable tourism destinations with Offshore Wind Farms (OWF) developed within the coastal area.
- Examination of available research on OWF and their impact tourism in Ireland.
- Development of a range of economic impact scenarios based on visitor feedback and potential investment scenarios arising from the Community Benefit Fund.
- The outputs from the visitor research were applied to a number of different visitor impact scenarios to provide a number of tourism impact scenarios. Two scenarios were modelled based on varying degrees of impact and visitors' willingness to visit a coastal tourism destination with OFW located within sight of the coastline.

SECTION TWO

Tourism and Economic Context

2.1 Tourism Context

Connemara and the Wild Atlantic Way

Fáilte Ireland's approach to tourism development is to ensure that it becomes increasingly sustainable and can continue to generate incremental revenue to sustain and increase levels of employment in local communities. Against the backdrop of the *UN Sustainable Development Goals* and the Government's commitments under the *Climate Action Plan 2021,* Fáilte Ireland has employed the internationally recognised VICE model to destination development. The approach focuses on the interaction between Visitors (V), the Industry (I) that serves them, the Community and culture that hosts them (C) and their collective impact on and response to the Environment (E) to guide the future sustainable development of tourism.

The approach aligns with UNWTO definition of sustainable tourism as "*Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities*" and reflects the relationship Fáilte Ireland envisages between the tourism industry partners, local communities and the natural and built environment which makes the Irish tourism product so unique. (*Wild Atlantic Way, Regional Tourism Development Strategy, 2023-2027*)

In order to prepare for the next phase of sustainable tourism development Fáilte Ireland launched their Wild Atlantic Way, Regional Tourism Development Strategy for the 2023-2027 period. It represents a 10-year vision for the sustainable development of tourism in Ireland's Wild Atlantic Way, together with a 5-year strategy towards the achievement of that vision. It is structured around six strategic objectives.

1. **Strategic Objective 1:**
   Grow the year-round appeal of the Wild Atlantic Way domestically and internationally ensuring we attract and disperse high value visitors into and throughout the region.
2. **Strategic Objective 2:**
   Raise the international profile of the Northern half of the Wild Atlantic Way to increase visitation and revenue.
3. **Strategic Objective 3**:
   Increase tourism revenue, visitor dispersion and season extension across the Southern half of the Wild Atlantic Way.
4. **Strategic Objective 4:**
   Protect the authenticity and "wildness" of the Wild Atlantic Way.
5. **Strategic Objective 5:**
   Enable and assist the industry to grow its capacity and capability so that it can thrive over the period of this strategy.
6. **Strategic Objective 6:**
   Foster strong coalitions of industry and stakeholders with a common purpose in creating flourishing destinations and thriving communities.

In the context of Connemara and in particular, South Connemara strategic objective four is extremely relevant from a sustainable destination development perspective. The sub-objectives identify the goals of enhanced visitor facilities, enhancing the sustainable destination profile of the area and ensuring the wildness of the WAW remains at the core of the visitor experience.

Strategic Objective 4: Protect the authenticity and "wildness" of the Wild Atlantic Way

- Provide more appropriate visitor facilities and sustainable visitor management plans for the outdoor natural assets in the region.
- Conserve, maintain & where relevant monitor key elements of biodiversity as part of any development projects to ensure they do not contribute to biodiversity losses or deterioration.
- Build and substantiate the reputation of the region as a sustainable tourism destination.

- Recognise that sustainable destination development will see a proper balancing of the local community, the environment and the visitor needs.
- Ensure that “wildness” remains at the core of the Wild Atlantic Way across all brand activity.

The WAW extends from Donegal to West Cork and has become a globally recognised destination tourism brand. By 2023 the WAW had delivered a 29% increase in visitor numbers to the region since 2013. In 2023, tourists took over 8 million trips to the WAW, almost 2 million more trips than in 2013. The value of tourism on the WAW was worth over €3 billion in revenue in 2023, compared to €1.9 billion in 2013, representing an increase of 59%.

57% of revenue on the WAW was generated by overseas tourists, and 43% was generated by domestic tourists[2]. The latest Fáilte Ireland data suggests overseas tourists to the WAW spend an average of 6.9 nights in the region, spending on average €551 per capita. Domestic tourists to the WAW spend an average of 3.0 nights, spending on average €210 per capita[3].

The Fáilte Ireland Tourism Barometer, based on 2023 industry survey analysis, suggests that 53% of businesses on the WAW reported an increase in overall business. 62% reported an increase in overseas visitors in 2023 compared to 2022, and 78% of hotels reported an increase in overseas visitors[4], suggesting that tourism performance in the region is on its way back to pre-Covid levels. 121,000 jobs were supported by tourism on the WAW in 2023, an increase from 86,000 in 2013. In some regions across the west coast, it is the biggest employer accounting for up to 1 in 4 jobs.

Nationally, the Wild Atlantic Way region has a 39% share of overseas visitors to Ireland and 44% of domestic visitors. Internationally, the brand has proven itself to be particularly compelling in the Great Britain, German and French markets but has also begun to grow market share in the U.S with revenue from North America now ahead of that of mainland Europe.

At a wider all-island level, a recent survey[1] of more than 7,000 potential holidaymakers from seven main markets sought their views on Ireland and Northern Ireland as holiday destinations. Results show there has been a significant increase in interest in visiting Ireland since 2023. ‘Beautiful landscapes and scenery’ are reported as the main attractor to those planning a visit to Ireland, identified by 34% of all respondents. This rating increases to between 39% and 46% in the Italian, French and German markets.

Connemara Coast & Aran Island VEDP

Connemara represents one of these unique and authentic tourism destinations along the Wild Atlantic Way (WAW). As a destination it has benefitted significantly over the course of the ten years since the launch of the Fáilte Ireland regional brand. It has become a tourism focal point for both domestic and international visitors and a must do experience along the Wild Atlantic Way.

The implementation of the Wild Atlantic Way, Regional Tourism Development Strategy is through the more locally focused destination development plans. One of the first in the country was the Connemara Coast & Aran Island VEDP. The vision within the VEDP is to extend the season and attract visitors to engage with the true essence and story of the Connemara Coast & Aran Islands without compromising the environment or culture of the region.

[1] *Tourism Ireland Sentiment Tracking Report (July 2024)*

The key objectives of the Connemara Coast and Aran Islands Visitor Experience Development Plan are to develop compelling experiences for this stretch of the Wild Atlantic Way that will:

- Motivate visitors to stay longer and spend more;
- Extend the length of the season;
- Align to the Wild Atlantic Way brand and target markets;
- Promote the concept of slow travel;
- Sustain and increase job creation in the local area; and
- Protect the special environmental, cultural and linguistic character of the region.

The themes of the Connemara Coast & Aran Island VEDP showcase the tourism product available in the region. The four themes are:

- Wilderness, Tradition & Innovation
- Inlets and Islands
- Resilience and Rebellion
- Inspired by Connemara & the Aran Islands

These themes highlight the key tourism offerings of the destination, which include outdoor activities in the form of both on land and on water activities e.g. hiking and biking, and cruising or boat tours. They also highlight the historical and cultural importance of the destination, including the Gaelic culture and historical sites that tell the stories of region's ecology, shipwrecks and famine.

One of the communities strongly engaged in the VEDP is Conamara Láir, situated in the centre of south Connemara. It comprises of the six main parish centres of Caiseal, Camus, Carna, Cill Chiaráin, Sraith Salach and Rosmuc. The area saw a population increase of 1.7% in 2022 compared to 2016, likely due to remote working practices having a positive impact on inward migration. It is also home to the Acadamh University of Galway offering third level education courses to full time undergraduates and postgraduates. There are four Coláistí Samhraidh in the area who between them welcome almost 2,000 Irish language students each year.

More recently, Conamara Láir developed their own local strategy that includes a strong focus on tourism. The overall focus of this plan is to nurture the sustainable future of:

- Population: strengthening the population of Conamara Láir through economic development and an emphasis on local natural resources;
- Infrastructure: addressing and remedying infrastructure shortfalls — roads, water and sewage treatment systems and other infrastructure which needs to be remedied for sustainable development;
- Language: The essence of our identity as noted in the Plean Teanga, "It is a rich and ancient language and it would be shameful if it died in our lifetime"
- Heritage: preserving and fostering the richness of the heritage and the beauty of the environment associated with Conamara Láir treasures;
- Arts and culture: optimising the creative and economic potential of the arts as a source of identity, development and a way of life, in particular in areas of traditional culture where Conamara Láir holds such a market lead;
- Education: one of the most significant keys to optimising socio-economic opportunities through better cooperation between stakeholders in the area;
- Employment: without sustainable employment, there can be no community and without a community, there will be no language.

From a tourism perspective, the key objectives for Conamara Láir are to grow cultural tourism, address the tourism accommodation deficit in the area as a catalyst to growing visitor numbers, optimise the potential of the Connemara Greenway and proposed coastal blueway, and develop Conamara Láir as a centre for language-based tourism.

Connemara Tourism Profile

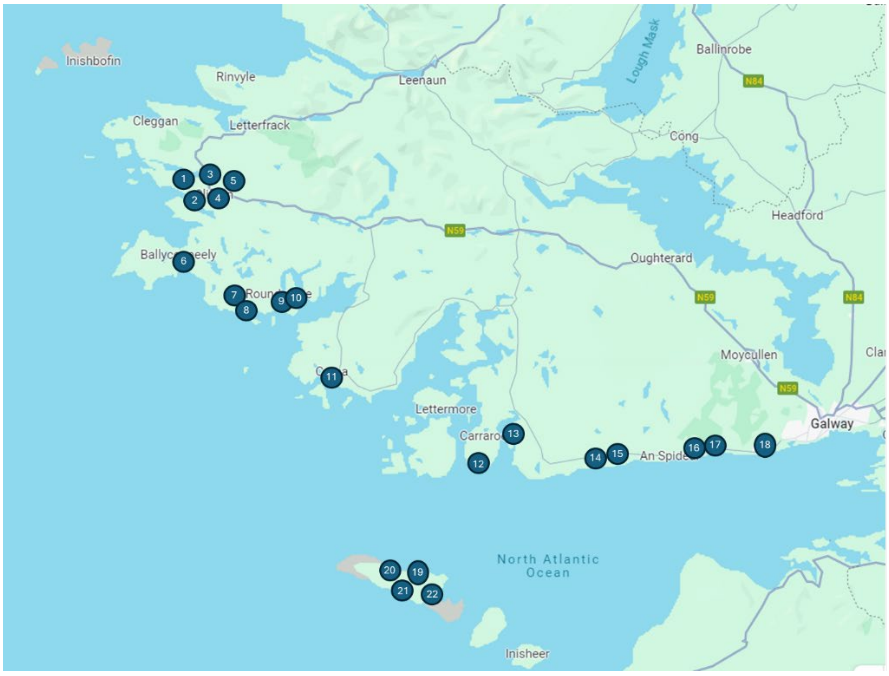
Galway remains one of the top tourism performing counties along the WAW. The city acts as a hub for visitors to explore the Connemara destination while Connemara in its own right has developed a significant share of the overnight visitor market. According to the latest Fáilte Ireland tourism performance data County Galway attracts 984,000 domestic trips and 1.7 million overseas visitors annually, contributing €754 million in tourism expenditure[5]. The key markets are 18% are from Britain, 42% from Mainland Europe, and 31% are from North America. The main reasons for a visit to Galway are for a holiday (73%) or to visit friends and relatives (20%)[6]. International visitors to Galway spend on average €351 per person and domestic visitors spend an average of €217 per person. 44% of international visitors and 35% of Irish residents visit during the peak months of July, August and September.

Connemara has proven to be particularly popular within these source markets. In addition to the appeal of the area for fully independent travellers (FIT) the destination features strongly on group tour programmes. Annual tourism performance at a local level is not available but the performance of top visitor tourist attractions provides some context to the appeal of the area. Connemara National Park welcomes more than 250,000 visitors annually while Kylemore Abbey & Garden attracts in excess of 400,000 visitors.

Limited data exists on current tourism performance and visitor numbers specific to south Connemara. Fáilte Ireland data shows that in 2022, as tourism performance nationally and internationally continues to recover from the COVID19 pandemic, Pearse's Cottage attracted 19,000. In the same year the Emigrants Commemorative Centre in Carna attracted 7,000 visitors. The Connemara Smokehouse welcomed 5,000 visitors in 2022. Pre-pandemic Fáilte Ireland data also shows Padrig Pearse's Cottage welcomed approximately 25,000 visitors in 2019. In the same year the Connemara Smokehouse attracted 12,000 visitors.

From a coastal tourism product perspective there are an estimated twenty activity operators or coastal tourism experiences based in Connemara. (source www.GalwayTourism.ie). These include a combination of on land and on water activity providers extending from kayaking and angling to guided experiences and supporting activity services such as bike hire.

Distribution of Coastal Activity Providers



Coastal Activity Providers

1. Walking Connemara
2. Real Adventures Connemara
3. Clifden Bike Shop & Tours
4. Mannion Bike Hire & Tours
5. Heritage Walks of Connemara
6. The Pony Point – Trekking & Horse Riding
7. The Company of Walkers
8. Dog's Bay Beach
9. Roundstone Outdoors
10. Roundstone Bay & Islands Food & Drink Tours
11. Shearwater Sea Kayaking
12. Atlantic Scuba Adventures
13. Rosaveel Ferry
14. Ireland West Angling
15. OT Walks
16. Spiddal Angling School
17. Galway Bay Fishing
18. Give it a Go Sea Kayaking
19. Aran Sea Tours
20. Dive Academy
21. Aran Bike Hire
22. Aran Island Ferries

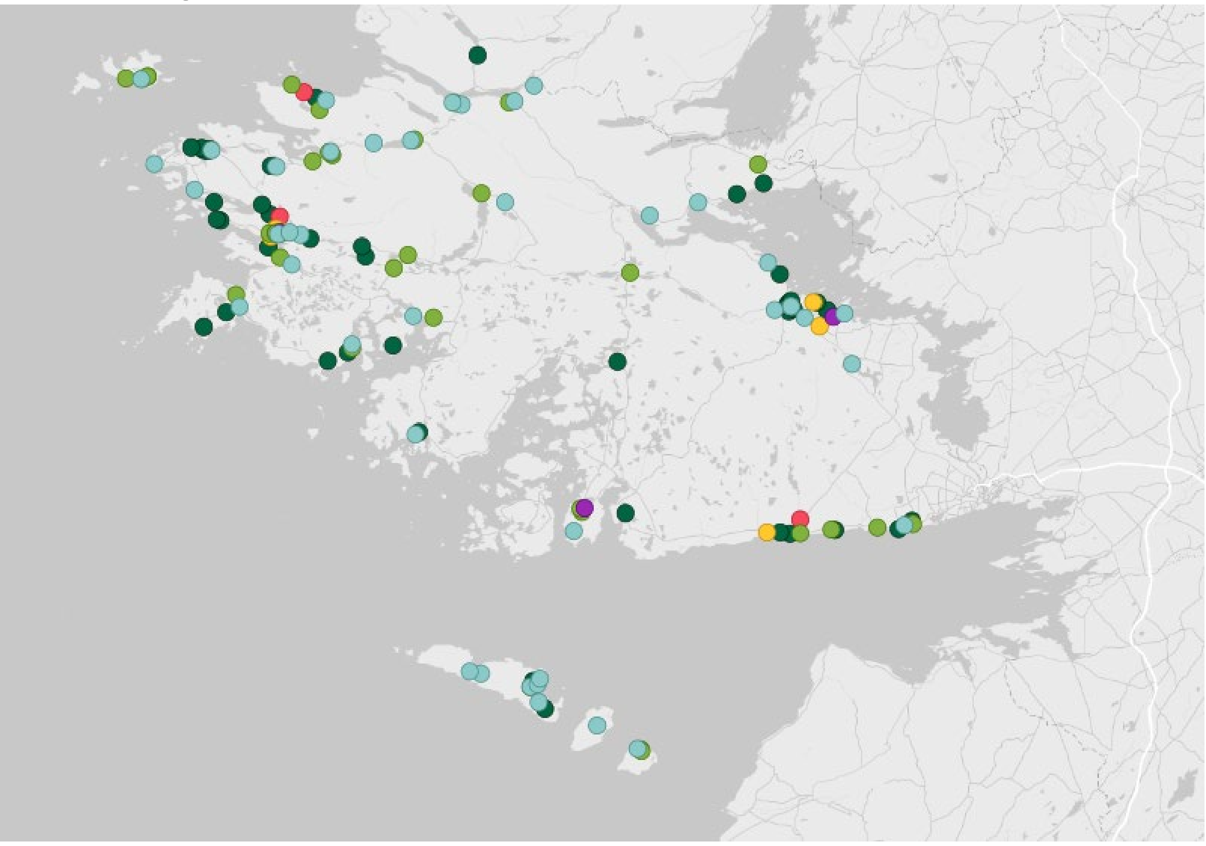
2.2 Connemara Accommodation Supply

The accommodation analysis highlights the dispersed nature of visitor accommodation across Connemara with Clifden and Spiddal bookending the south Connemara destination. The analysis highlights an imbalance between accommodation supply levels in north and south Connemara. The greater percentage of accommodation options are located in north Connemara. In January 2024, there were 268 properties registered with Fáilte Ireland, providing more than 5,300 bed spaces. 40% of all bed spaces across the destination are provided by hotel accommodation.

Table 2.2.1 – Connemara – Distribution of Accommodation[9]

Accommodation Type	Number	Rooms/Units	Bed Spaces
Hotels	29	900	2,138
Guesthouses	6	60	153
Bed & Breakfast	38	175	416
Self-Catering	33	33	178
Welcome Standard	153	441	1,664
Camping / Caravans	3	128	526
Hostels	6	-	288
Total	**268**	**1,737**	**5,363**

Fáilte Ireland Registered Accommodation



(Source: Fáilte Ireland Accommodation Supply Interactive Dashboard, as of January 2024)

There are 29 hotels operating in Connemara. Ten are rated are four-star hotels with a further ten offering three-star accommodation and four in the two-star category.

Clifden and the surrounding hinterland represents the main accommodation hub in Connemara. There are 73 properties registered with Fáilte Ireland in the Clifden area providing 1,245 bedspaces. This includes seven hotels providing 215 rooms or 559 bed spaces accounting for more than a quarter of the overall hotel bedstock in Connemara.

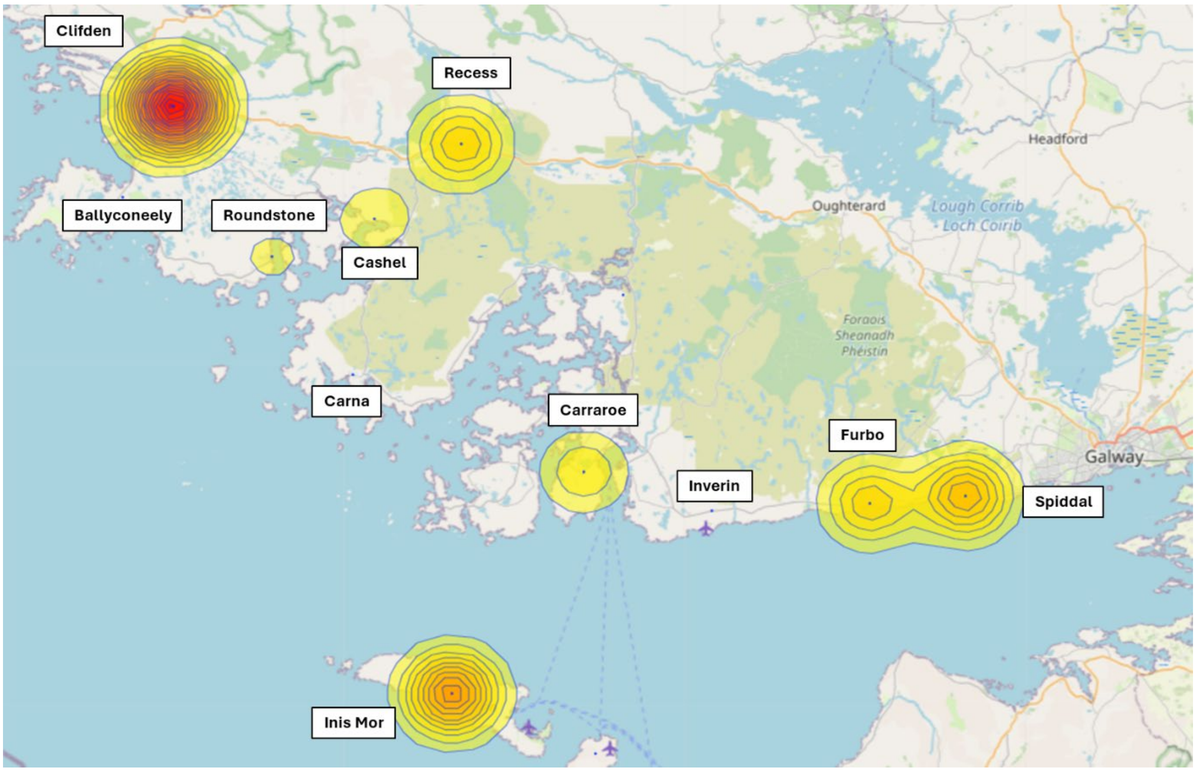
More than half of the properties in Connemara are registered under the 'Welcome Standard' accreditation.

Table 2.2.2 - Distribution of Bed Spaces in Welcome Standard Properties

Accommodation Type	% of Bed Spaces
Self-Catering	48%
Activity Holiday Accommodation	25%
Bed & Breakfast	20%
Camping	6%
Glamping	1%

Almost half (48%) of all Welcome Standard bed spaces are provided in self-catering accommodation. A further 25% are described as activity holiday accommodation.

Geographic Distribution of Failte Ireland Registered Rooms



(Data source: Failte Ireland Accommodation Supply)

The figure illustrates the distribution of Failte Ireland registered rooms in the area. Within this context the term 'room' includes accommodation in B&Bs, Guesthouses and Hotels. It also includes 'pitches' on caravanning and camping sites and 'units' in other registered accommodation types.

Clifden and the immediate locality has the largest number of bedrooms registered with Failte Ireland. There are 435 rooms registered to Clifden across the Failte Ireland accommodation types.

The axis of Furbo and Spiddal provide 240 rooms, including 140 rooms in a Furbo hotel. Inis Mor has 197 registered rooms. The total includes one hotel with 22 rooms.

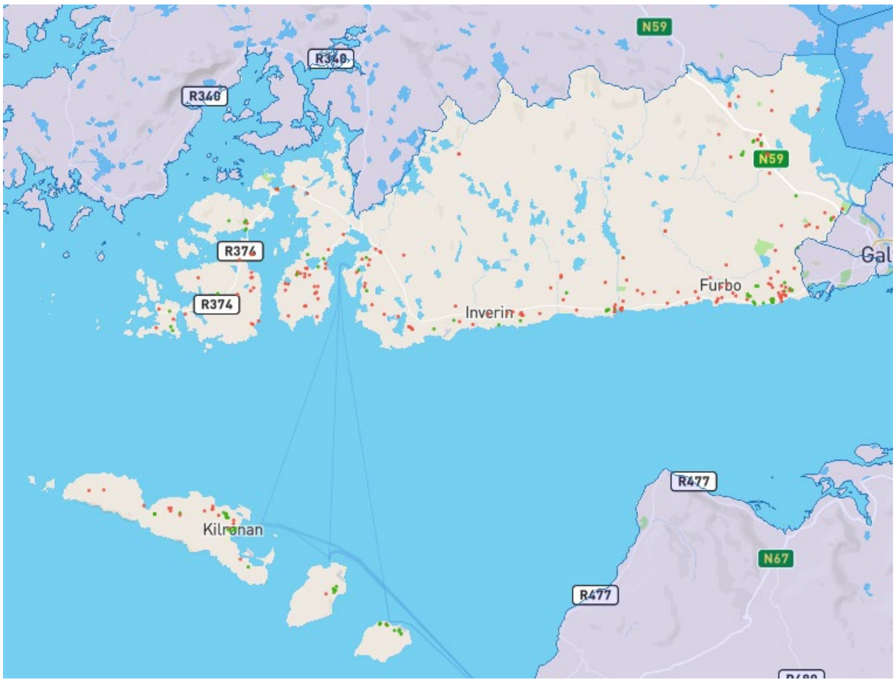
There are 101 rooms registered in Recess. This includes 97 rooms divided between three hotels. It is noted that one of the hotels recorded is understood to be currently closed to guests.

There are 61 rooms in Carraroe, including one hotel with 44 rooms. The 47 rooms registered in Cashel include one hotel with 29 rooms. Roundstone is recorded as having 26 rooms including one hotel with 11 rooms.

AirBnB Accommodation

As of March 2024, there were 1,030 properties registered with Airbnb across the Connemara North and Connemara South Local Electoral Areas of Galway County Council [2]. 754 of these properties were listed in North Connemara with 276 properties in South Connemara.

Airbnb Properties - North Connemara Local Electoral Area



Airbnb Properties - South Connemara Local Electoral Area

[2] www.insideAirbnb.com (2024)

2.3 Socio Economic Context

The socio-economic profile of the area is based on Central Statistics Office (CSO) data for Connemara North and Connemara South Local Electoral Areas for the Census years 2022 and 2016. These Local Electoral Areas also include the Aran Islands and Inishbofin off the west coast. Additional socio-economic data is contained in Appendix One.

North & South Connemara Local Electoral Areas

(source: CSO Interactive mapping)

In 2022 the population of the combined Local Electoral Areas of Connemara was 41,398 in 2022, an increase of 7.4% since 2016. The 2016 population of 38,532 was a reduction of 1.8% on the population recorded at Census 2011.

Table 2.3.1 - Population

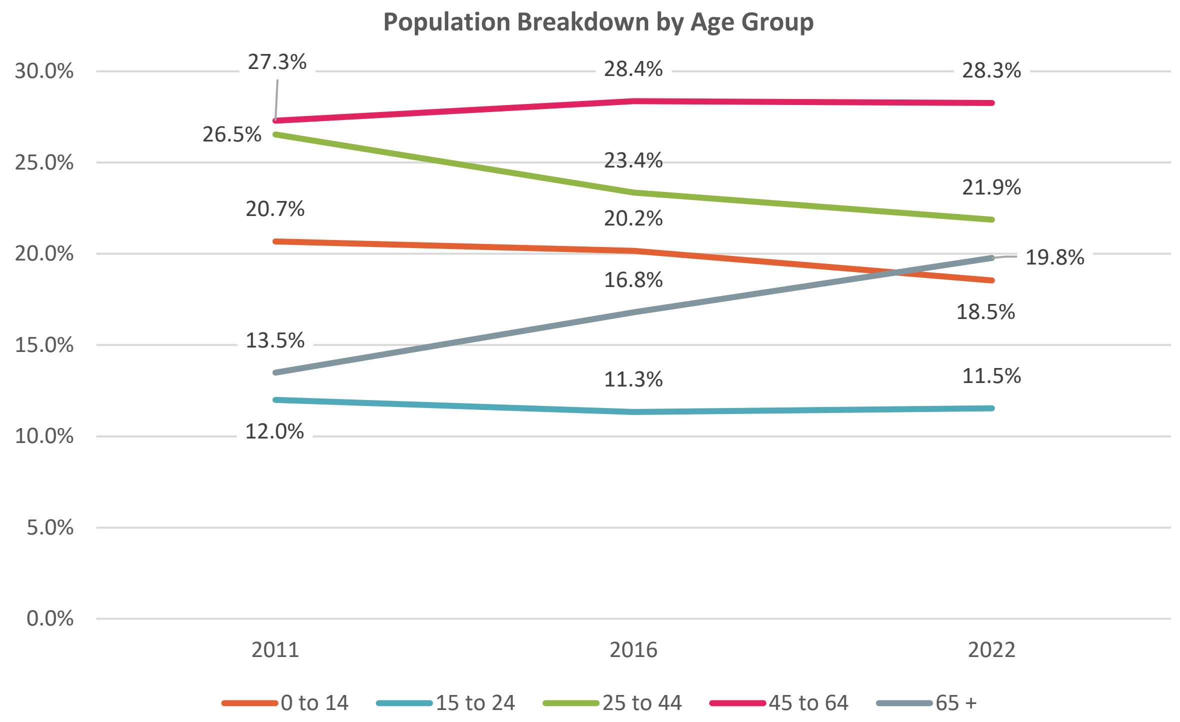
2011	% Change 2011-2016	2016	% Change 2016 – 2022	2022	% Change 2011 - 2022
39,238	-1.8%	38,532	+7.4%	41,398	5.5%

Over the 11-year period between 2011 and 2022 the population of the Connemara Local Electoral Areas increased by 2,160 or 5.5%. The age group with the largest growth over this period is the population aged over 65 years old. The population of this cohort increased by 2,893 or 54.7%. At Census 2011, the over 65 age group represented 13.5% of the population, increasing to 16.8% in 2016 and 19.8%, or one-in-five at Census 2022.

Table 2.3.2 - Age Profile

Age Group	2011		2016		2022		% Change 2011-2022
0 to 14	8,114	19.6%	7,767	20.2%	7,676	18.5%	-5.4%
15 to 24	4,707	11.4%	4,367	11.3%	4,778	11.5%	1.5%
25 to 44	10,414	25.2%	8,999	23.4%	9,055	21.9%	-13.0%
45 to 64	10,710	25.9%	10,930	28.4%	11,703	28.3%	9.3%
65 +	5,293	12.8%	6,469	16.8%	8,186	19.8%	54.7%
Total	**39,238**		**38,532**		**41,398**		**5.5%**

There has been a downward trend in the population aged 0 to 14 years old over an 11-year period. Between 2011 to 2016 the population in this age group declined by 4.3%. In the period between 2016 to 2022 there was a further decline of 1.2%. Over the period between 2011 to 2022 the population aged between 0 to 14 years old declined by 5.4%. This segment represented 20.7% of the population in 2011 and 20.2% at Census 2016 reducing to 18.5% at Census 2022.



Between 2011 to 2016 the population aged between 15 to 24 years old reduced by 7.2%. In the following intercensal period from 2016 to 2022 the population aged between 15 to 24 years old increased by 9.4%. Over the period between 2011 to 2022 the population aged between 15 to 24 years old experienced an overall increase of 1.5%. This segment represented 12.0% of the population in 2011 reducing to 11.3% at Census 2016 remaining largely consistent at 11.5% at Census 2022.

Between 2011 to 2016 the population aged between 25 to 44 years old reduced by 13.6%. In the following period from 2016 to 2022 the population of this age group experienced an increase of 0.6% albeit lower than overall population growth for the period. Over the period between 2011 to 2022 the population aged between 25 to 44 years old experienced an overall reduction of 13.0%. This segment represented 25.2% of the population in 2011 reducing to 23.4% at Census 2016 reducing again to 21.9% at Census 2022.

Between 2011 to 2016 the population aged between 45 to 64 years old increased by 2.0%, while the overall population declined by 1.8%. In the following period from 2016 to 2022 the population of this age group experienced an increase of 7.1% comparable with the overall population growth of 7.4% in the area. Over the period between 2011 to 2022 the population aged between 25 to 44 years old experienced overall growth of 9.3%. This segment represented 25.9% of the population in 2011 increasing to 28.4% at Census 2016 remaining consistent at 28.3% at Census 2022.

Employment Status (Aged 15 and over)

	2016		2022	
Principal Economic Status	**Total**	**%**	**Total**	**%**
At Work	15,280	49.7%	17,554	52.1%
Looking for first regular job	201	0.7%	214	0.6%
Unemployed having lost or given up previous job	2,373	7.7%	1,494	4.4%
Student	3,466	11.3%	3,714	11.0%
Looking after home / family	2,679	8.7%	2,149	6.4%
Retired	5,378	17.5%	6,859	20.3%
Unable to work due to permanent sickness or disability	1,267	4.1%	1,446	4.3%
Other	121	0.4%	292	0.9%
Total	**30,765**	**100.0%**	**33,722**	**100.0%**

Census 2022 reports there were 33,722 people aged 15 and over in Connemara an increase of 9.6% on Census 2016. 17,554 (52.1%) in this cohort were at work compared with the 15,280 (49.7%) reported at Census 2016. There was an overall increase of 14.9% in the number of people at work between the Census.

At 5% of the population who were unemployed or looking for their first regular job compared with 8.4% at Census 2016. Between the Census there was an overall reduction of 50.7% in the number of people that were unemployed or seeking their first job. It is worth noting that Census figures reported may be influenced by the seasonal nature of tourism employment in the area which is likely to fluctuate between peak and off-peak tourism seasons.

20.3% of the population were retired at Census 2022 compared with 17.5% at Census 2016. Overall there was a 27.5% increase between the Census in the number of retirees living in the area further highlighting the aging population found in Connemara.

Occupations

	2016		2022	
	Total	**%**	**Total**	**%**
Managers, Directors and Senior Officials	1,358	7.7%	1,590	8.3%
Professional	3,481	19.7%	4,338	22.8%
Associate Professional and Technical	1,697	9.6%	1,995	10.5%
Administrative and Secretarial	1,577	8.9%	1,620	8.5%
Skilled Trades	2,858	16.2%	2,773	14.6%
Caring, Leisure and Other Service	1,377	7.8%	1,431	7.5%
Sales and Customer Service	863	4.9%	870	4.6%
Process, Plant and Machine Operatives	1,288	7.3%	1,315	6.9%
Elementary Occupations	1,484	8.4%	1,461	7.7%
Not stated	1,670	9.5%	1,655	8.7%
Total	**17,653**	**100.0%**	**19,048**	**100.0%**

Professional Occupations represented the most populated occupation group in Connemara, with 22.8% working in them in 2022, accounting for 4,338 people, an increase from 3,481 people in 2016. This is followed by Skilled Trades Occupations held by 2,773 (14.6%) in 2022. This is, however, down from 2016 when 2,858 people had Skilled Trades Occupations. Sales and Customer Service Occupations represented the lowest percentage of Connemara's occupations, accounting for 4.6% of the working population in 2022.

Employment by Industry

	2016		2022	
	Total	**%**	**Total**	**%**
Agriculture, forestry and fishing	782	5.1%	760	4.3%
Building and construction	896	5.9%	1,121	6.4%
Manufacturing industries	1,612	10.5%	1,944	11.1%
Commerce and trade	2,561	16.8%	3,075	17.5%
Transport and communications	1,186	7.8%	1,370	7.8%
Public administration	772	5.1%	977	5.6%
Professional services	4,400	28.8%	5,129	29.2%
Other	3,071	20.1%	3,178	18.1%
Total	**15,280**	**100.0%**	**17,554**	**100.0%**

The professional services industry represented 29.2% of Connemara's population in 2022, with 5,129 people working within the industry. This is an increase of 16.5% compared to 2016. The building and construction industry has also grown substantially in 2022, growing to 1,121 from 896 in 2016, representing a 25% increase.

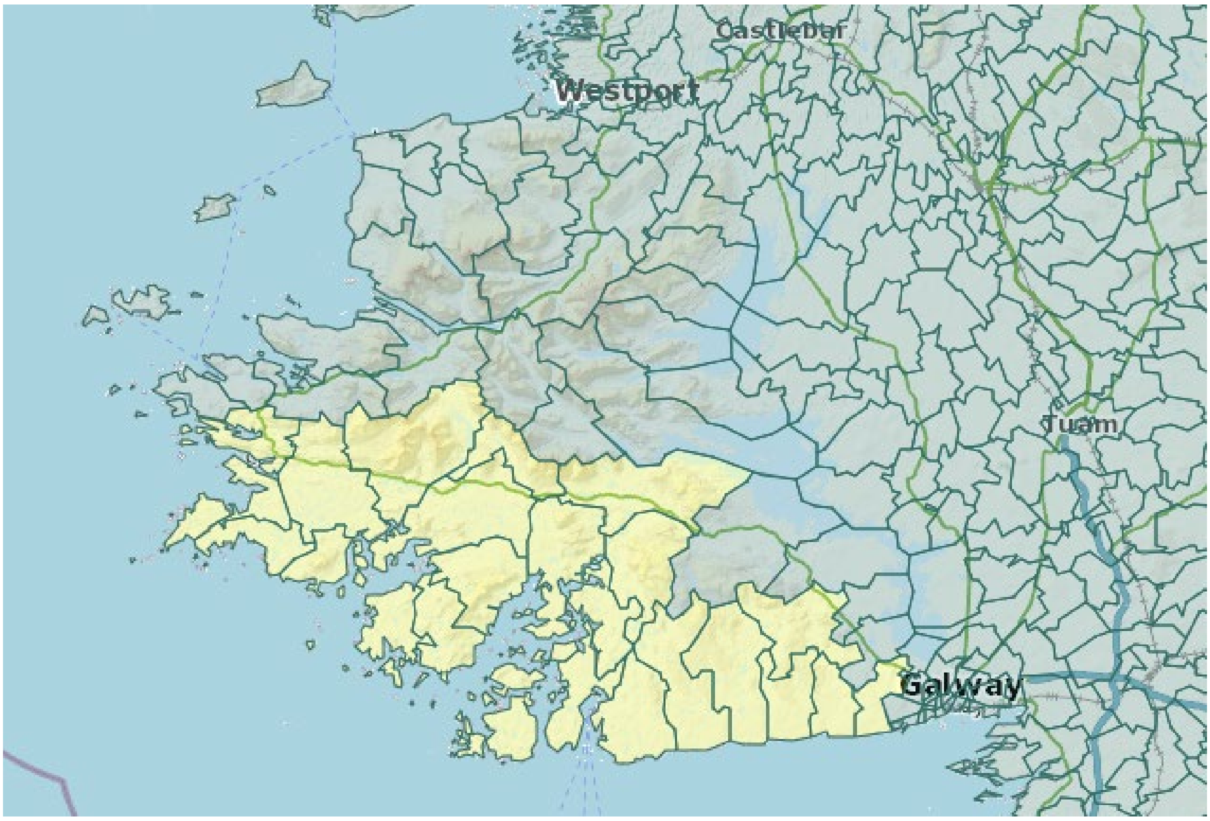
Educational Attainment

	2011		2022	
Highest Level of Education Completed	**Total**	**%**	**Total**	**%**
No formal education	533	2.1%	925	3.3%
Primary education	3,734	14.5%	2,670	9.5%
Lower secondary	3,524	13.7%	3,335	11.8%
Upper secondary	4,204	16.3%	4,546	16.1%
Technical or vocational qualification	1,960	7.6%	1,941	6.9%
Advanced certificate/Completed apprenticeship	1,257	4.9%	1,411	5.0%
Higher certificate	1,231	4.8%	1,544	5.5%
Ordinary bachelor degree or national diploma	2,176	8.5%	2,445	8.7%
Honours bachelor degree, professional qualification or both	2,506	9.7%	3,495	12.4%
Postgraduate diploma or degree	2,746	10.7%	3,707	13.2%
Doctorate(Ph.D) or higher	470	1.8%	616	2.2%
Not stated	1,380	5.4%	1,551	5.5%
Total	**25,721**	**100.0%**	**28,186**	**100.0%**

At Census 2022 13.2% of Connemara's population aged 15 and over had achieved a postgraduate diploma or degree This is an increase of almost 1,000 people from 2016, showcasing a growth of 35%.

2.4 Socio-Economic Profile – Coastal Areas

The socio-economic profile of the coastal area in south Connemara focuses on the 26 Electoral Districts within closest proximity to the Sceirde Rocks OWF. The area identified broadly reflects the area of Connemara situated to the south of the main N59 Clifden to Galway road. The area includes several towns and villages in proximity to the coastline including Clifden, Roundstone, Carna, Cashel, Carraroe, Rossaveel and Spiddal. Additional detail on the socio-economic profile of the area is provided in Appendix one.



(Source: CSO SAPMAPS 2022)

Electoral Districts

Barna	Kilcummin	Crumpaun	Owengowla	Bunowen
Furbogh	Kilcummin B	Lettermore	Skannive	Dunloughan
Spiddle	Letterfore	Gorumna	Knockboy	Errislannan
Slieveaneena	Turlough	Illion	Bencorr	Derrylee
Killannin	Camus	Moyrus	Roundstone	Clifden
Selerna				

Population (2022)

Population	Male	Female	Total
South Connemara	12,059	12,303	24,362

The population of South Connemara in 2022 was 24,362, comprising 12,303 (50.5%) females and 12,059 (49.5%) males.

Age Profile

Age Group	M	F	Total	%
0 – 19	3,058	2,953	6,011	24.7%
20 – 59	5,637	6,023	11,660	47.9%
60+	3,364	3,327	6,691	27.5%
Total	**12,059**	**12,303**	**24,362**	**100%**

Almost 30% of South Connemara's population were 60 years of age or older in 2022, highlighting the ageing population of the area. 47.9% were aged between 20-59, whilst 24.7% were aged between 0-19.

Employment

Just over half (50.5%) of South Connemara's population aged over 15 years old were reported to be 'at work' in 2022. Over one fifth (21.6%) of the South Connemara population were retired in 2022. An additional 10.3% of South Connemara's population were students.

Industries of Employment

28.9% of South Connemara's workforce worked within the professional services industry, accounting for a total of 2,906 people. This was made up predominantly of females, with 2,077 of the 2,906 positions filled by females. The second biggest industry in terms of population in South Connemara was the commerce and trade industry, accounting for 18% of the population, with 909 males and 899 females working within the industry.

Educational Attainment

12.9% of South Connemara's population held a postgraduate diploma or degree, and a further 1.9% held a Ph.D. or higher. 15.8% have completed upper secondary level education and 12.4% have completed lower secondary level education, with 10.1% completing primary education.

REPUCON CONSULTING

SECTION THREE

Impacts of Offshore Wind Farms on Tourism and Recreation

3.1 Introduction to Coastal Tourism

Offshore wind is a major and rapidly evolving renewable energy industry, and an important element of the transition to a greener economy[3]. OWF's are by nature located adjacent to coastal communities and areas that have developed their profile as coastal tourism destinations.

The United Nations World Tourism Organisation (UNWTO) state that "*Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents) and tourism has to do with their activities, some of which involve tourism expenditure*"[4]. Coastal tourism is a sub-category of tourism, and the EU Blue Economy Observatory define coastal tourism as "*recreational activities taking place in the proximity of the sea (such as swimming, sunbathing, coastal walks, and wildlife watching) as well as those taking place in the maritime area, including nautical sports (e.g. sailing, scuba diving, cruising, etc.)*"[5].

Coastal tourism destinations are built around a diverse range of land and water-based activities offered within the natural environment of the coastal communities. The variety of coastal tourism activity includes the following, most of which are accessible in the south Connemara area.

Table 3.1.1 – Coastal Tourism Activities

Land Based Coastal Tourism Activities	Adventure centres, Beach activities and sports, Beach yoga, Bird watching, Bouldering, Cliff walks, Climbing, Cruises, Cycling trails, Dark skies, Eco tours (land), Guided tours, Hiking, Horse riding, Seaside food experiences, Visits to coastal tourism attractions, Walking trails, Wildlife watching
Water Based Coastal Tourism Activities	Angling, Boating, Canoeing, Canyoning, Clam diving, Coasteering, Diving, Dolphin watching, Eco tours (water), Ferry Tours, Fishing, Flyboarding, Horse surfing, Jet skiing, Kite surfing, Night Kayaking, Paddle boarding, Parasailing, Rowing, Sailing, Scuba diving, Sea Caving, Sea Kayaking, Snorkelling, Surfing, Swimming, Whale watching, Windsurfing, Yachting

In Ireland, 1.9 million people live within 5km of the coast. Tourism and recreation in coastal areas is the largest contributor to employment among Ireland's established marine industries. Marine tourism is estimated to represent 10% of our overall tourism sector. Excluding accommodation, an estimated 260 enterprises are involved in delivering marine activities around the coast of Ireland[6].

3.2 International Offshore Wind Farm Experiences

Tourism and OWF's have co-existed for many years. The experiences of other international tourism destinations highlight the opportunity OWF's present for tourism and the local community.

Block Island Wind Farm, USA

Located off the coast of Rhode Island, Block Island Wind Farm was the first offshore wind farm in the United States. Developed in 2016, it consists of five wind turbines and has become a tourist attraction in itself. Visitors can take boat tours around the turbines, learning about renewable energy and the environmental benefits of offshore wind power. The tours link in with existing tourism propositions in the area, and include the history of the North Lighthouse, Southeast Lighthouse, and a drive through Old Harbour. A study carried out on this wind

[3] *The impacts of offshore wind farms on local tourism and recreation: a research study (2021)*
[4] *UNWTO, Glossary (2024)*
[5] *EU Blue Economy Sectors (2023)*
[6] *A Survey of Domestic Coastal and Marine Tourism and Leisure Activity in Ireland, SEMRU, NUIG (2020)*

farm in 2020, four years after construction, indicated the wind farms had no adverse effect on visitor's participation in tourism and recreation in the area[7].

Carr-Harris and Lang (2019) assessed the extent to which the Block Island OWF has affected the vacation rental market, using data from Airbnb, in comparison with other nearby tourist destinations in Southern New England before and after construction[8]. The results suggest that the construction of the Block Island Wind Farm caused a significant increase in nightly reservations, occupancy rates, and monthly revenues for Airbnb properties in Block Island during the peak-tourism months of July and August.

Nysted Offshore Wind Farm Visitor Centre, Denmark
The Nysted Offshore Wind Farm, located in the Baltic Sea off the coast of Denmark, includes a visitor centre situated in the town of Nysted. The Information Centre at the Nysted harbour is an exhibition that explains about the Nysted Offshore Wind Farm. It features interactive exhibits, educational programs, and guided tours that provide insights into the construction, maintenance, and environmental impact of offshore wind farms.

The exhibition, known as 'The World of Wind', was originally for local residents but was later considered an attraction / interest for tourists visiting Nysted Harbour. It is estimated that 20 – 25 people visit the centre on a 'normal day', delivering 4,000 visitors a year including school visits[9]. Safari boat tours combing seal watching and visiting the windfarm are in high demand, offering daily excursions[10].

[7] *Tradeoffs in tourism & recreation at the first offshore windfarm in the United States (2020)*
[8] *Sustainability and tourism: the effect of the United States' first offshore wind farm on the vacation rental market (2019)*
[9] *EU Marine Spatial Planning Platform (2018, 2019)*
[10] *Stiftung Offshore Windenergie (2016)*

Bremerhaven Offshore Wind Energy, Germany

Bremerhaven has developed into a centre of excellence for offshore wind energy. The "Tour de Wind" Bremerhaven is a guided bus tour visitor experience that links the offshore wind turbines with nearby industrial areas / cities. The tour focuses on providing information on offshore wind energy and its entire supply chain. The bus tour visits the offshore security-training centre, the wind house and the offshore heliport[11]. Established in 2012, the "Tour de Wind" was very successful, and led to the Bremerhaven Economic Development Company developing a permanent offshore information centre.

Rampion Offshore Wind Farm, UK

The Rampion Offshore Windfarm comprises 116 wind turbines that each sit on top of a foundation fixed into the seabed. Situated in Newhaven, UK, this wind farm runs a boat tour on the Brighton Driver 4 fast ultra-stable catamaran. A successful Rampion Offshore Visitor Centre was opened to support tourism developments for the wind farm project.

Visitors to the Visitor Centre are provided with an interactive educational experience that caters for children and adults. It includes hands-on exhibitions, interactive displays, games and videos, as well as a 360˚ Virtual Reality experience that takes visitors out to the wind farm. The aim of the centre is to increase awareness and understanding of the wind farm itself, as well as to raise knowledge about offshore wind energy and global climate change[12]. The website also outlines information to the Wind Farm's community benefit fund, education outreach, and offshore wind careers.

[11] *The impact of offshore wind energy on tourism – Good Practices and Perspectives from the South Baltic Region (2013)*
[12] *Rampionoffshore.com (2024)*

Middelgrunden Offshore Wind Farm, Denmark

The Middelgrunden Offshore Wind Farm is a 20 turbine wind farm approx. 3.5km off the coast of Copenhagen in Denmark. The farm delivers about 4% of the power for Copenhagen. From a tourism perspective, the Middelgrunden Offshore Wind Farm gives tourists the option to climb a 60-metre tower on one of the turbines among other activities, including an offshore information centre and boat tours. On National Turbine Day, which takes place every two years in Denmark, members and guests are also given the opportunity to tour inside the turbines[13].

Interest in tours of the windfarm have increased from about 50 tours a year to 95 tours in 2023 welcoming more than 1,600 visitors in the year[14]. Lesson learned from the windfarm's participation in the UNITED project include:

- Positive effect of tours on local businesses including boat operators and tour guides, diversifying the local tourism offer and providing alternative income streams
- Tours raise awareness and highlight role of offshore energy production
- Increased awareness of tour offering through cross-sell by boat operators

Scroby Sands Visitor Centre, UK

Scroby Sands was one of the UK's first commercial OWF's. It is located 2.5km off the coast of Great Yarmouth in the UK. The OWF consists of 30 wind turbines, each with a capacity of 2 megawatts. From a tourism development perspective, the Scroby Sands OWF is a great example of how an OWF can deliver a tourist attraction. After the project was completed in 2004, a permanent information centre was established, educating visitors on offshore wind energy. This underwent refurbishment in 2011 and 2018, which allowed visitors to engage with new exhibits and interactive displays, and a viewing platform with telescopes. There was also an interactive educational area where local schools can visit as part of a tour. Prior to its closure in 2019 the centre was welcoming 35,000 per year[15].

[13] *The Potential of Offshore Wind Energy Tourism in Ocean City, New Jersey (2021)*
[14] *EU European Maritime Spatial Platform Multi-use and co-existence compendium / UNITED (EU Horizon 2020 Programme)*
[15] *EU / South Baltic Report (2016)*

Sheringham Shoal Offshore Wind Farm, UK

The Sheringham Shoal Offshore Wind Farm site is located in the Greater Wash, between 17 and 23 kilometres off the Norfolk coast, north of the seaside town of Sheringham. The wind farm comprises 88 turbines, two offshore substations, two 132 kV submarine export cables of about 22km each as well as a 21.6km onshore cable and new inland substation. From a tourism development perspective, a visitor centre for the OWF was opened in 2011. The centre has interactive elements, viewing points with telescopes, educational panels so visitors can learn about renewable energy. The visitor centre is located in The Mo, an iconic building on Sheringham's east promenade, also home to the Sheringham Museum and the town's famous collection of lifeboats[16] highlighting the connection between local maritime tradition and modern maritime technology.

Saint Brieuc Offshore Wind Farm, France

The offshore wind farm of Saint-Brieuc (Brittany) is composed of 62 turbines of 8MW each, with a total capacity of 496 MW. The turbines cover an area of 75 km^2. In June 2023, the boat company Les Vedettes organised a boat tour service around the OWF. It is an educational experience where visitors learn how the wind turbines work. It was deemed a successful initiative, and the boat company has decided to continue its offer for further tours[17]. The 2024 schedule comprises of 2 tours a month, operating from April to September[18].

[16] *Sheringhamshoal.co.uk*
[17] *EU, Boat tours in Saint Brieuc Offshore wind farm (2024)*
[18] *Vedettesdebrehat.com (2024)*

3.3 Impact on Coastal Tourism – Lessons from other destinations

Previous research conducted in Ireland and overseas suggests the impact of OWF's on tourism destinations is relatively benign, and in some cases positive. In many locations, as demonstrated in the international examples, OWF's have become a tourism attraction by virtue of their modern and innovative design.

One of the key studies conducted in Ireland was the '*Public Perception of offshore wind farms in Ireland'* by Cronin et al (2021). The research analysed how the public perceive OWF's in Ireland, and the impact they have on tourism. 1,154 tourists were surveyed as part of this study, to understand their attitudes towards OWF's in Ireland. The findings suggest OWF's in Ireland do not impact on coastal areas as tourism destinations. In addition to the not impacting on visitor perceptions of coastal tourism areas, the results also revealed significant support for OWF's in Irish Waters.

The results of the 2021 study mirror the findings of the primary research conducted within this assessment process. The 2024 Repucon Consulting research suggests the majority of visitors to Connemara would not avoid visiting the destination due to the presence of an offshore wind farm while the majority of visitors would consider Connemara to be a more sustainable destination due to the existence of an OWF.

Among the key survey findings from the '*Public Perceptions of offshore wind farms in Ireland'* research paper include;

- The majority of participants would not avoid a beach where offshore wind turbines were visible (58%) with 15% avoiding beach visits with turbines visible.
- Participants outlined the tourism potential of the proposed wind farm who believe that an observation deck could enhance opportunities for education and tourism.
- A clear majority of those who took part in the survey were in favour of offshore wind farms both on a local and national level.
- Of those who took part in the survey, 49% had seen an offshore wind farm before. Of those, 4% could see one from their house, 7% could see one on their commute to work and 41% had seen one while on holidays.
- 14% of those questioned had visited the coast in order to look at an offshore wind farm.
- 41% of participants would take a boat trip to see an offshore wind farm and 30% would not, 23% did not know if they would or not.

- 49% of respondents found offshore wind farms interesting to look at whereas 35% do not really notice them when they look out to sea. Only 17% of respondents believed that offshore wind farms ruin beach visits with 50% believing that they do not ruin beach visits.
- 93% of respondents would facilitate development of an offshore wind farm outside of their locality, either through active support or not objecting, and 87% of respondents would facilitate development of an offshore wind farm in their locality, either through active support or not objecting.
- 65% percent of respondents believed that Ireland is too reliant on foreign energy.

The study on *'The Impacts of Offshore Wind Farms (OWF's) on Local Tourism and Recreation'* by Welch in 2021 reviewed the impact of OWF's on local tourism and recreation in Aberdeen. The results of this study were again quite positive in terms of the impacts OWF's have on tourism destinations. The key findings included;

- Whilst impacts vary from stakeholder to stakeholder, findings from the literature indicate that the overall impact of offshore wind farms on tourism appear relatively benign, and in some cases positive. No respondent in the survey highlighted any negative impact on tourism.
- In some cases, OWFs may be a tourism attractant by virtue of their modern, innovative and novelty factors, and have a positive impact on tourism. OWF tourism can provide a niche market for an area to stand out in the competitive tourism market.
- The majority of respondents agreed that the presence of an OWF has not impacted their part-taking in tourism activities in the past, with more highlighting that OWF's have encouraged them to visit coastal regions more and take part in harbour tours.
- Respondents highlighted that a visitor centre linked to the OWF would be welcomed by many and would open up educational opportunities i.e. school visits.

Positive comments included visually attractive OWF's, the positive symbol of pride in renewable energy initiatives, educational links with schools and harbour/boat tour opportunities, and potential visitor centre developments. Overall, findings were either neutral or positive, with very few negative comments about the impacts on local tourism and recreation.

In Scotland, research was conducted in 2022 on *'Offshore wind farm developments – public perceptions survey'*, which examined the public's perceptions of OWF developments in Scotland and the impact of OWF's on their visitor experience. Among the key findings included;

- Respondents were asked would the presence of wind turbines visible from the shore stop them visiting a coastal location – 88% said no, 4% said yes and the remaining 8% said they don't know. This is consistent with the results from the visitor analysis carried out for this study, with 84% indicating an OWF would not stop them from visiting Connemara.
- 81% of visitors said seeing a wind farm while on holiday would make no difference to their choice of holiday, with an additional 3% saying it would make them more likely to choose that destination. Only 11% said it would make them less likely to choose that holiday destination.
- The majority of respondents approve of OWF developments in general.
- This included those surveyed who live in coastal areas, with 85% indicating that they approved of OWF's before one was developed nearby, and still approve of them now.
- 66% agreed with the statement that offshore wind farms provide a boost for the local economy, while two in five (41%) agree that they are a positive feature of the coastal landscape and around a third (34%) agreed that they create new recreational opportunities.

The research provides strong support for OWF development in Scotland and suggests there is minimal to no impact of OWF's on tourism in coastal areas.

A review of other studies across Ireland, the UK, Europe and the US largely suggested no tourism impact on the areas which OWF's have been developed. A Fáilte Ireland study analysing visitor attitudes to windfarms in Ireland on the environment (2007) found that the majority of visitors felt that wind farms had either no impact (49%) or a positive impact (32%) on the landscape, while 17% felt it had a negative impact. A follow up study in 2012 indicated a greater appreciation that wind farms have a positive impact on the Irish landscape compared to 2007. Seven out of 10 (or 71%) of visitors claim that potentially greater numbers of wind farms in Ireland over the next few years would have either no impact or a positive impact on their likelihood to visit Ireland[22]. This study did also mention the perceived negative visual impact of OWF's in Ireland, but these impacts ultimately would not stop the majority of tourists from visiting locations across Ireland that have the presence of an OWF.

Similar results arose in a 2012 UK Study of tourist's attitudes to OWF's, in which 80% of UK respondents, and 83% of Scottish respondents said their decision on where to visit or where to stay would not be affected by the presence of a wind farm. 52% of all respondents disagreed that wind farms spoil the look of the UK/Scottish countryside, with a further 29% neither agreeing nor disagreeing[23]. In 2016 a US study on '*Seeing clearly in a virtual reality: Tourist reactions to an offshore wind project'* by Noblet et al analyses visitor research carried out on Monhegan Island in Maine, US, in relation to visitor's views on the development of an OWF. The analysis concluded that 90% of visitors would continue visiting the island even if an OWF was developed[24]. These UK and US studies again show that OWF developments appear to have no impact on tourism in coastal destinations.

A literature review carried out by Scottish Power Renewable (2019) to analyse the East Anglia ONE North Offshore Windfarm reviewed a number of UK and non-UK OWF's to analyse their impacts on the tourism industry. It was concluded that a consistent trend was found amongst all studies – all studies reviewed show that tourists are generally not deterred from visiting an area due to the presence of OWF's. Additionally, a number of tourism businesses across these studies indicated that they anticipated no impact to their business or on visitor behaviour or spend[25].

A series of other studies across the UK, EU states and the US suggest the impacts may vary according to distance from the coast but, in general, there is little evidence of negative impacts. A study carried out by Westerberg et al (2013) [26] in France put forward two policy recommendations. The study recommendations that windfarms should be located no closer than 12 km from the shore. However, the study's second recommendation contended that wind farms can be located 5 km and outwards without a loss in tourism revenues if accompanied by a coherent environmental policy and wind farm associated recreational activities.

Research carried out by the European Maritime Spatial Planning Platform (MSP) in 2018 analysed the potential impacts of offshore wind and tourism, and the visual effects of OWF's. The MSP carried out research in the Netherlands on the experiences of tourists, the regional economic impact to the local communities, and the impact on tourism. On the visual effects of OWF's, their findings were only positive and provided no reason to object to the development of an OWF.

A study by the German Offshore Wind Energy Foundation (2013) on *'The impact of Offshore Wind Energy on Tourism'* indicates the importance of early engagement with the tourism industry to find benefits for the sector. Tourism can provide a niche market for an area to stand out in the competitive tourism market. There can be a multitude of potential attractions. This requires significant commitment in terms of personnel, finance, networking and partnerships. The study recommended viewing platforms and information boards as a minimum, so that people can understand more about the windfarm development. Findings from this study also suggested that an increased interest in technology and wind energy could lead to an increased number of visitors and day-trippers to destinations with an OWF presence. A multitude of potential tourism benefits are outlined also, and include information centres, boat tours, sightseeing flights, information boards and viewing platforms[29].

The same German Offshore Wind Energy Foundation study also highlighted some potential negative impacts of an OWF from a tourism perspective. The key concerns included the visual impacts, the impacts on the landscape, the use of sea scape and the potential of noise and shadow flickering, which again shows consistencies with the concerns raised by the tourism industry and local communities in Connemara. The study also outlined how such problems could be overcome and uses the example of constructing wind turbines in a manner which makes them suitable to the landscape and represent a landmark. Overall, the research concludes that the impacts of offshore wind energy on the regional tourism industry are mainly positive, however, and have very few negative effects on tourism.

In their study on '*Analysing the Effects of Block Island Wind Farm on Rhode Island Recreation and Tourism Activities',* Smythe et al. (2018) raised concerns around the potential visual impact of OWF's, as well as the potential of an OWF blocking potential sailing routes or restricting space for other recreational activities such as windsurfing or diving. Visual impact concerns were raised by Welch (2021) also, but it stated that comparative findings suggest that such concerns have a very low or no impact on tourism or a visitor's decision to visit a destination.

In some cases, OWF's have appeared to be a factor in attracting more visitors to a destination. Carr, Harris, and Lang (2019), who carried out a study on *'The effect of the United States' first offshore wind farm on the vacation rental market',* found that the construction of the Block Island OWF had a positive impact on the rental market, with a significant increase in Airbnb revenue since the construction of OWF[32]. Similarly, in Denmark, according to American Clean Power (2024), the development of wind turbines has had an increase on tourism rates. This is further acknowledged by Beer et al. (2018), in their study on *'Renewable energy sources as an attractive element of industrial tourism',* who suggests that renewable energy sources can be considered an attractive element within industrial tourism and can in some cases increase the number of visitors to an area due to modern design, uniqueness and eco-image.

The Block Island OWF farm was also analysed in '*Offshore Wind Farm in Rhode Island: Tourism Impacts',* a study by Celia et al. (2024), which reiterates that tourism has grown in the area since the development of the OWF and has become a significant tourism attraction. The review explained how the location of the Block Island OWF is already a magnet for tourists and the presence of the OWF enhances the attraction through a combination of natural beauty and modern technology. It highlights how modern tourists are often interested in supporting environmentally friendly initiatives and experiencing destinations that prioritise renewable energy and green practices, making places like Block Island an ideal sustainable tourism destination[34].

In the US, the University of Delaware carried out visitor survey research in 2018 to understand the impacts of an OWF on visitors to a coastal region. The analysis of 1,725 beachgoers, found that most beachgoers say they would be unaffected or positively affected by the presence of offshore wind farms[35]. Visitors also mentioned that they see an opportunity around niche tourism developments, including sightseeing flights or boat tours, in addition to visitor amenities such as information centres and viewing platforms, which is consistent with the opportunities arising in the UK and European case studies above.

In their study on '*Wind energy and tourism: Industry impacts and opportunities for Wind farm tourism',* Bidwell et al. (2021) analysed the potential tourism opportunities around OWF developments. Findings suggested that adventure tourism, eco-tourism and educational tourism incorporating wind farm infrastructure are emerging globally as key opportunities for rural localities[36]. They concluded that the only impacts of OWF's on the tourism industry appear to be positive, due to visitor's interests in technology, infrastructure design, and curiosity.

3.4 Community Benefit Funding Impact

Community benefits delivered by OWF developers/companies follow the legislation (where present) of the country in which the OWF is being built and is coming ashore. Benefits schemes vary in kind, including benefit funds and/or community share participation in the project, and whether they are mandatory or voluntary. Voluntary schemes, as found in England, Scotland, the Netherlands and the USA, are to date largely flexible according to the circumstances of particular projects. Mandatory schemes, for example, as found in Denmark and Germany, are more rigid, but also more predictable. Both types of schemes have a variety of stakeholder objectives, including being a good neighbour, sharing rewards, supporting community engagement, providing compensation and delivering fair reparations[19].

In Ireland, the establishment of a Community Benefit Fund is mandatory for wind farm developments that have been successful under ORESS 1. For the Sceirde Rocks project, this Community Benefit Fund is calculated at a rate of €2/MWh of electricity exported from wind farm for 20 years. The total fund, €70 million, is based on annual estimate of €3.5 million per annum for 20 years[20].

Access to a Community Benefit Fund was mentioned frequently across consultations that took place with both the local Connemara communities and with the tourism industry. Potential benefits for local tourism may also be associated with the use of community benefit funds to support and/or create new tourism and recreation facilities. Such supports include funding for Visitor Centres, significant donations to ventures supporting tourism, heritage, culture and arts, museums exhibitions, viewing platforms, information boards, amphitheatre style seating, and support for new festivals[21].

The North Wales GyM project provides an excellent example of Community Benefits funding for local area tourism and recreation projects, via the main Community Fund (£19m over the lifetime of the project), and a specific GyM OWF Tourism Fund of £690,000 delivered during the construction of the project[22]. This tourism fund has seen major improvements made to the Victorian pier in Llandundo facilitating cruise liners docking in the town, supported replacement of the slipway onto the beach, and supported a number of walking and cycling opportunities.

The Rampion Offshore Wind Farm has also contributed to tourism in the local area. The community fund helped established the Rampion Visitor Centre on Brighton Beach, which opened in 2020. The community fund has supported a number of other tourism / recreation ventures also, such as support for local hospitality businesses, e.g. funding of family-friendly cafés[23].

The Beatrice Offshore Wind Community Fund, established in 2017, includes support for tourism, culture, heritage and the arts. One example of how this community fund developed tourism in the area is the £40,000 investment that helped Covesea Lighthouse to develop a new tourism and heritage centre outside Lossiemouth, attracting 1,300 visitors to Moray annually[24].

[19] *The Impacts of Offshore Wind Farms (OWFs) on Local Tourism and Recreation -- Evolving Lessons from Practice, (2022)*
[20] *Sceirderockswindfarm.ie (2024)*
[21] *The impacts of offshore wind farms on local tourism and recreation: a research study (2021)*
[22] *Gwynt y Mor Community Fund, RWE.com (2024)*
[23] *Rampion Community Benefit Fund, Impact Report (2023)*
[24] *Beatrice Offshore Wind Farm Ltd, Impact Report (2023)*

SECTION FOUR

Tourism Impact Analysis:
Visitor Research and Consultations

4.1 Primary Research & Consultation

The research and consultation framework for the tourism impact assessment is aligned with the VICE model for sustainable tourism development. A total of 212 visitors to south Connemara were interviewed to gather their views on OWF and potential tourism impact on the area. A further 19 consultations were undertaken with members of the tourism industry and representatives of local communities across south Connemara.

4.2 Visitor Research Summary

Interviews were undertaken at locations in Carna, Carraroe and Rosaveel with domestic and overseas visitors who were visiting coastal areas of south Connemara and the Aran Islands. Interviews were conducted at weekends and during midweek in June 2024.

The breakdown of the gender of visitors interviewed was 44% female and 56% male. The largest percentage of visitors were aged between 36 to 45 at 23% of all visitors. The lowest percentage of visitors were aged 66 and over at 9% of all visitors. 21% of visitors were aged 26 to 35 and 17% of visitors were aged between 46 to 55.

52% of survey participants were from Ireland or Northern Ireland. 43% of visitors were visiting from overseas countries. Overseas respondents mostly came from France at 31% reflecting the appeal of Connemara in the French market. Visitors from the US accounted for 22% of responses with visitors from the UK representing 20% of the overseas visitors interviewed.

51% of all visitors were in full-time employment at the time of their visit. 20% of visitors were retired, and 11% of those visiting were students.

48% of visitors travelled to Connemara by car and 33% travelled as part of a tour group. A small percentage of visitors travelled by bus (11%) and campervan (7%). 39% of visitors travelled in large groups of six or more people, while the second highest percentage was visitors who travelled with two people in their group (26%). 37% of visitors travelled with a group of friends, while 23% travelled as part of a tour group and 21% as a couple. Another small percentage travelled in a family group with children (13%).

46% of visitors travelled on a day trip to Connemara. A comparable number of visitors were on holidays and staying outside the Connemara area (28%) or on holidays and staying in the Connemara area (27%).

54% of visitors stated that they visited a local tourism attraction as part of their visit. The appeal of coastal tourism activities in the area is reflected by 40% who had walked along a coastal area in Connemara. 22% of visitors stated that they had taken part in a water-based activity in the destination.

Results of the visitor surveys are contained in Appendix 2.

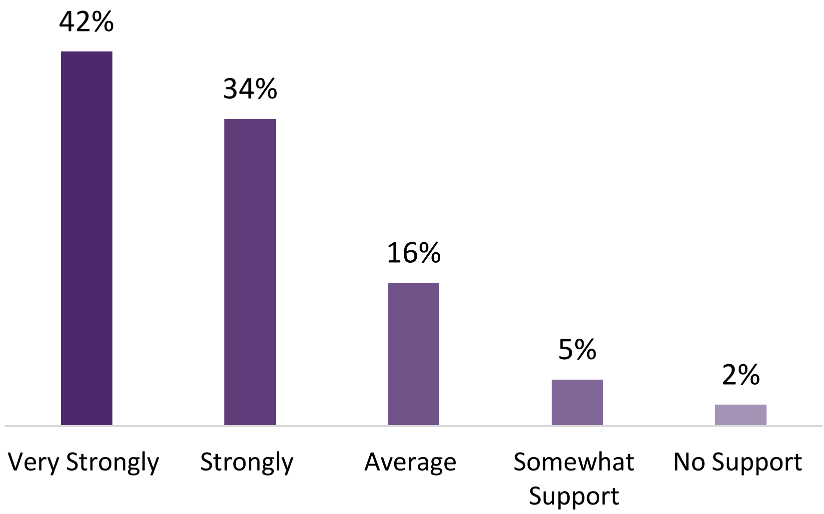
Visitor Attitudes Towards OWF's

Visitors were asked if they had previously seen an offshore wind farm. 43% of respondents said they had not while 58% of respondents had seen an OWF. Visitors were also asked to rate the attractiveness of OWF's. 42% said they find OWF's neither attractive nor unattractive. More visitors said they find them attractive (24%) rather than not attractive (17%). An equal number to the people who found them unattractive said they did not know (17%).

Visitors were also asked if they were aware that offshore wind farms were a renewable source of energy. 95% of visitors said they were aware that OWFs are a renewable source of energy. 5% said they were not aware.

Visitors were also asked to rate their interest in sustainability/ climate action issues. 30% of visitors rated themselves as being 'very interested' in sustainability/climate action issues. A quarter of visitors interviewed rated themselves as 'interested' with 30% of respondents suggesting they had an average level of interest.

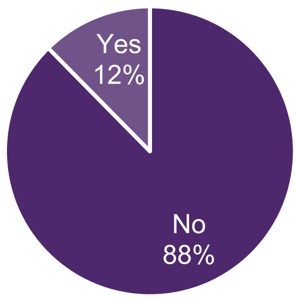
Visitor Support for Transition to Renewable Energy



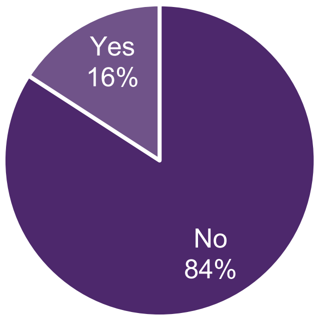
When asked if visitors supported a transition to renewable energy, 42% of visitors very strongly supported a transition to renewable energy. 34% of visitors strongly supported this transition. 14% of visitors were ambivalent to the transition to renewable energy and 5% somewhat supported this transition. 2% of visitors said they didn’t support this transition.

Visitor Attitudes Towards OWF’s and Impact on Tourism

Visitors were asked if they had ever avoided a coastal destination because of an OWF located nearby.

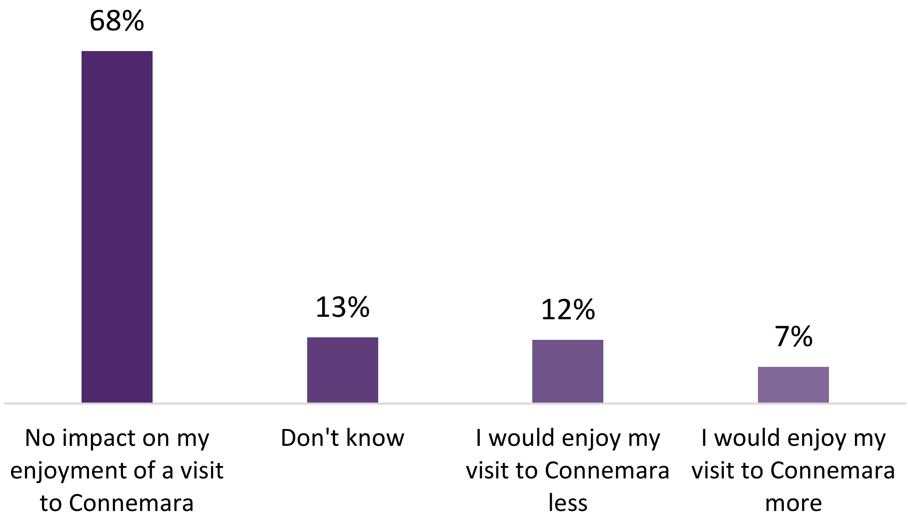


The vast majority of respondents (88%) said they had not avoided a coastal destination because an OWF was nearby and 12% of respondents said they had.

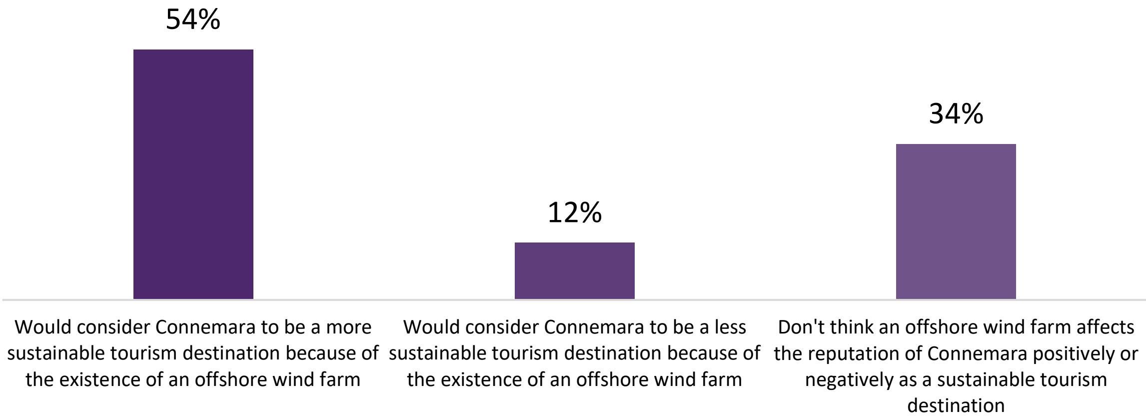


When asked if the presence of an OWF located approx. 5km off the coast of Connemara would stop visitors from visiting the area, the majority of people said no (84%) while 16% said yes.

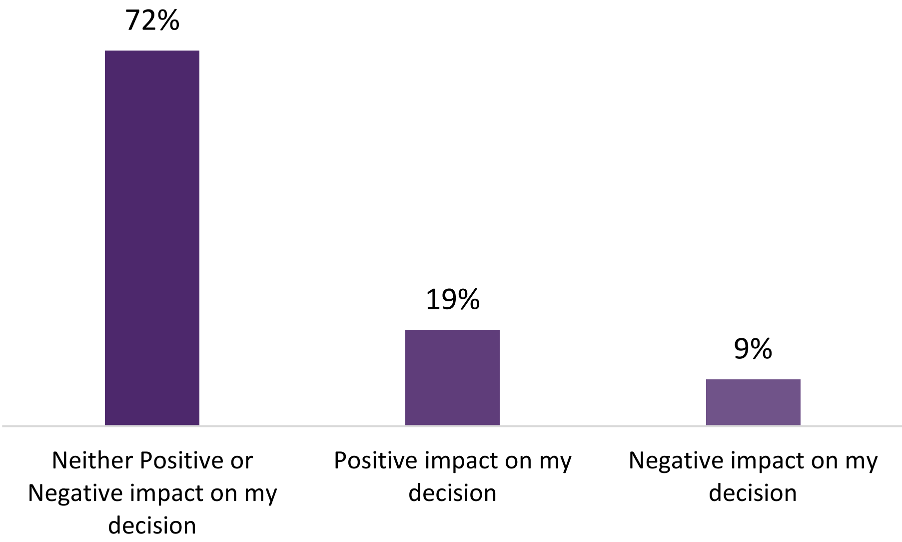
Visitors were asked if the presence of an OWF located approximately 5km off the coast of Connemara would impact their enjoyment of a holiday/visit to Connemara. 68% of visitors stated it would not impact their enjoyment of their holiday with 7% stating it would enhance their visit while 13% did not know. 12% felt they would enjoy their visit less as a result of the OFW.



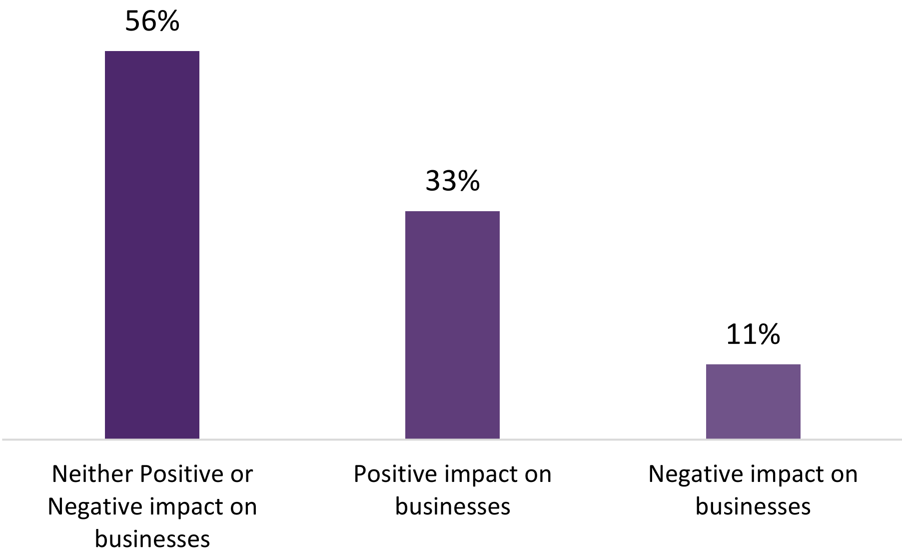
Visitors were asked their views on the perceived sustainability of a destination located close to an OWF. 54% of visitors said they would consider Connemara to be a more sustainable tourism destination due to the existence of an offshore windfarm. 34% of respondents said that they didn't think an offshore wind farm affects the reputation of Connemara positively or negatively as a sustainable tourism destination. 12% of visitors said that they would consider Connemara to be a less sustainable tourism destination due to the existence of an offshore wind farm.


54%
12%
34%
Would consider Connemara to be a more sustainable tourism destination because of the existence of an offshore wind farm
Would consider Connemara to be a less sustainable tourism destination because of the existence of an offshore wind farm
Don't think an offshore wind farm affects the reputation of Connemara positively or negatively as a sustainable tourism destination

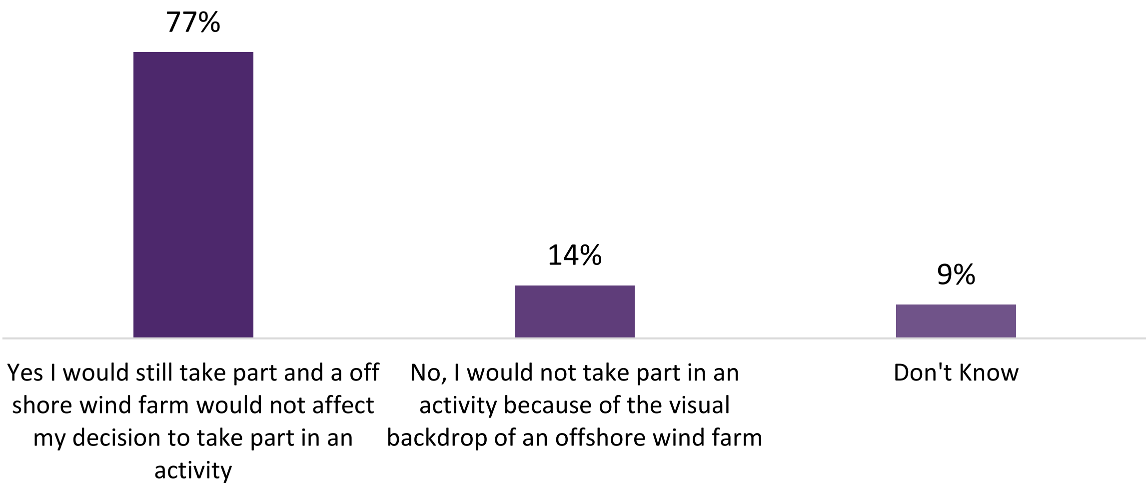
Visitors were also asked if the presence of an OWF in a coastal area would have any impact on the visitor's decisions to visit that destination, 72% of visitors said that it would have neither a positive nor negative impact on their decision to visit that destination. 19% said it would have a positive impact, and 9% said it would have a negative impact on their decision to visit.



Visitors were asked on their views towards the potential impact of OWF's on local businesses (e.g. restaurants, hotels, shops, etc.) in Connemara. 56.1% of visitors said that it would have neither a positive nor negative impact on businesses. One third of visitors felt it would have a positive impact while 10.8% said it would have a negative impact on local businesses.



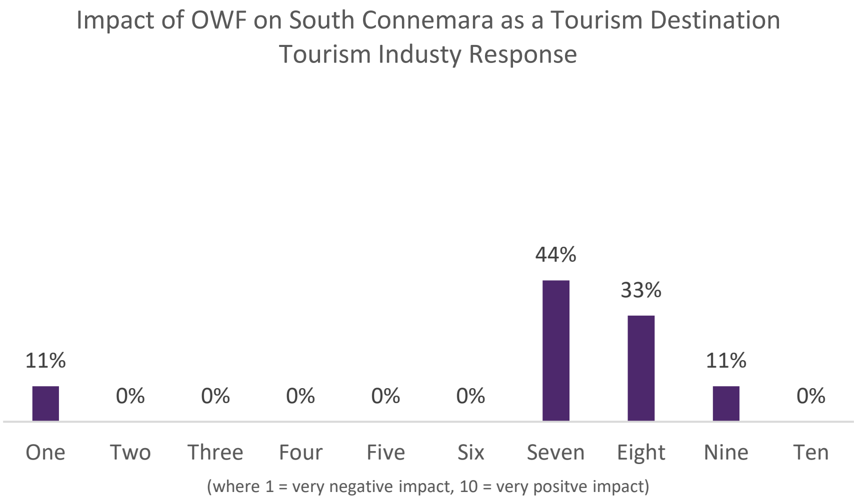
Survey participants were asked if they would take part in a coastal tourism activity that would have the views of an OWF in the background (e.g. kayaking, boat tour, sailing trip, fishing trip etc.). 77% of visitors said they would still take part in the activity and an offshore wind farm would not affect their decision to take part in the activity. 14% of respondents said that they would not take part in an activity because of the visual backdrop of an offshore windfarm. 9% of visitors said they didn't know.



4.3 Tourism Industry Feedback Summary

In order to gain insight into the potential impacts of the Sceirde Rocks OWF project, nine tourism industry consultations were carried out to understand the views of the local tourism industry in Connemara. The consultations were undertaken with activity providers, accommodation providers, event organisers, tourism networks, and tourism service providers in Clifden, Roundstone, Carna, Kilkieran, the Aran Islands and Bearna.

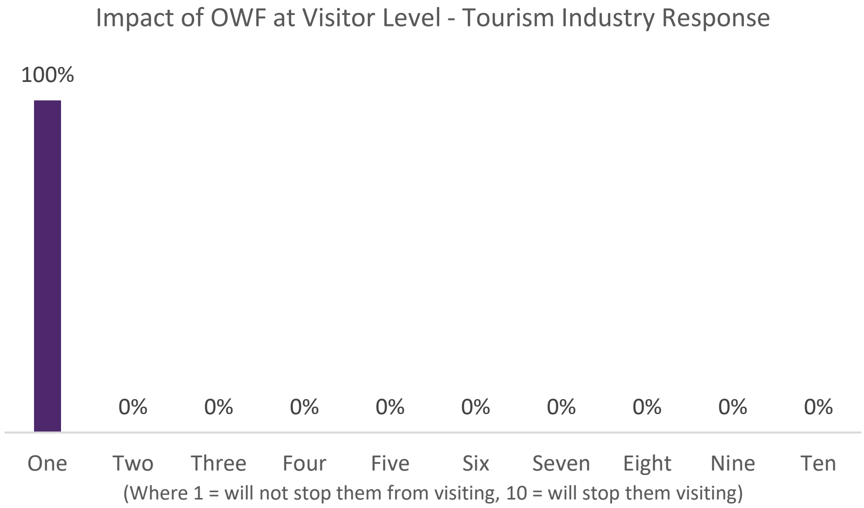
The consultations were focused on the views of the tourism industry on the potential impact the OWF would have on tourists visiting Connemara, the opportunities and challenges it could present for the sector and the possible impact on local Connemara communities



Tourism stakeholders were asked to rate the potential impact an OWF would have on South Connemara as a tourism destination on a scale of 1-10, (on a scale where 1 is a very negative impact and 10 is very positive impact).

The average score amongst the tourism industry was 6.9 out of 10, suggesting the OWF will have a positive impact on tourism.

The tourism industry stakeholders were also asked to rate how much of an impact an OWF would have on visitor's decision to visit Connemara, (where 1 is the OWF will not deter visitors from visiting Connemara and 10 will be a major deterrent). The average score amongst the tourism industry was 1.0 out 10, indicating an OWF in Connemara would not have any impact on a visitor's decision to visit Connemara.



A number of tourism opportunities were also highlighted by the tourism industry:

Opportunities highlighted by the Tourism Industry

- Boat excursions at Rossaveel Harbour and other coastal areas in South Connemara.
- Develop a series of walking trails with signage and information boards / viewing platforms with information about renewable energy and how OWF's work.
- Tourism propositions in areas of Connemara that have little or no infrastructure e.g. a walking trail & viewing platform in Ceantar na nOileán.
- Develop the eco-tourism proposition in Connemara e.g. eco-tours combined with visiting seals and the OWF.
- Potential of putting the fund towards the development of tourism infrastructure to build up a range of activities in the destination.
- Develop the sustainable tourism proposition in Connemara.
- Incorporate the OWF developments into an overall tourism masterplan for Connemara.
- Collaborations between tourism operators and schools to provide an educational opportunity for students to learn how wind energy works. This could incorporate a school tour to the OWF.
- The OWF to be promoted and emphasised as part of the Wild Atlantic Way route.
- The OWF development can be a positive for future Greenway connections along the Wild Atlantic Way into the South Connemara region.
- Collaboration between Connemara's Marine Hub and the OWF to provide an educational tourism proposition.

- Develop an OWF Museum / Visitor Centre / Centre of Excellence.
- Analyse similar OWF's internationally to understand how tourism can be successfully driven by their presence.

The overall outlook among the Connemara tourism industry was generally positive and did not foresee any negative impacts on the sector. The opportunities reflected above demonstrate the scale of tourism impact the OWF could deliver.

Significantly, no potential negative tourism impacts were highlighted or risks to the tourism economy across south Connemara with the majority of the commentary focused on the potential uplift if new opportunities are capitalised upon.

As well as the potential for tourism growth in the area, the potential environmental benefits and community fund benefits were also highlighted by the tourism industry. Along with tourism enterprise opportunities such as boat trips or excursions, a possible educational angle was identified as a potential benefit. Collaborations between tourism providers and local schools were mentioned, as well as the potential for creating a school tour proposition that incorporates the OWF.

Opportunities around eco-tourism, museums, information and viewing points for Greenways / trails, and for restaurants / cafés, were mentioned. Utilising the location of the OWF beside the Wild Atlantic Way was also highlighted as a potential opportunity, as well as including any tourism opportunities the OWF possesses in any future tourism masterplans. There is potential to capitalise on the funding arising from the OWF development to develop tourism infrastructure in the smaller, less-developed areas within south Connemara to boost their economies and tourism profiles.

The tourism industry highlighted the importance of following best practice examples of international OWF's that have successfully grown their tourism product following OWF developments. Additionally, some of the opportunities highlighted are consistent with the international research analysing how tourism opportunities can arise from the development of an OWF e.g. boat excursions, viewing platforms, visitor centres.

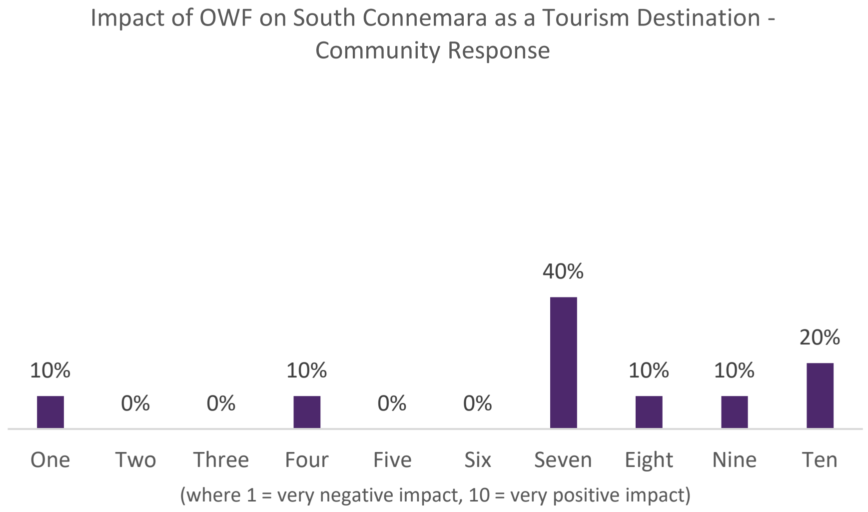
The tourism industry was asked to identify any potential challenges linked to the OWF. The main feedback was the potential negative visual impact of an OWF for visitors to Connemara, managing concerns of local fishermen and the fishing community, and challenges around the local ecosystem during the construction phase.

The tourism industry did collectively agree, however, that such concerns would have no impact on a tourist's decision to visit the area or take part in any sort of coastal activity in South Connemara.

4.4 Community Feedback Summary

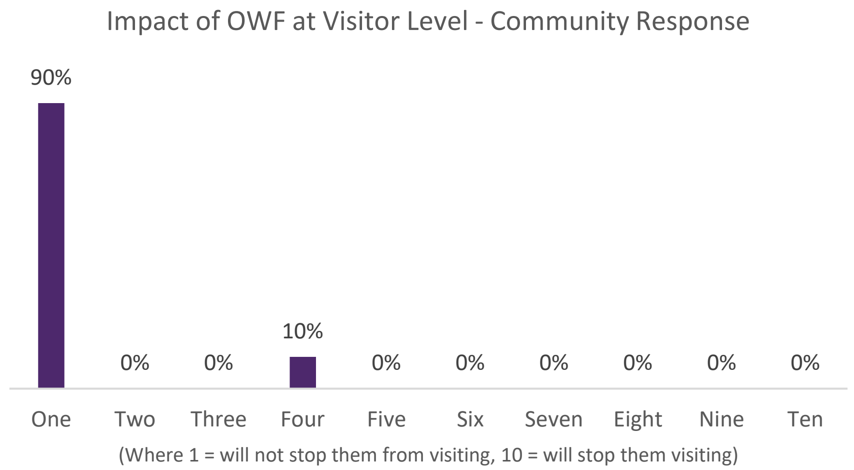
In order to gain insight into the potential impacts of the Sceirde Rocks OWF, ten community member consultations were carried out to understand the views of the local communities in Connemara. Community representatives were consulted in Clifden, Carna, Carraroe, Roundstone, Lettermullan, and the Aran Islands.

Community members were asked to rate the potential positive impact an OWF would have on South Connemara as a tourism destination on a scale of 1-10, (where 1 is no positive impact and 10 is very positive impact).



The average score recorded among the community representatives was 7.8 out of 10 suggesting the OWF could have a positive tourism impact.

Community representatives were also asked to rate how much of an impact an OWF would have on visitor's decision to visit Connemara, (where 1 is the OWF will not deter visitors from visiting Connemara and 10 it will be a major deterrent). The average score amongst community members was 1.4 out of 10, indicating an OWF in Connemara would not have any negative impact on a visitor's decision to visit Connemara.



Community members were asked about the general view within their communities in relation to the development of an OWF in Connemara. They were also asked how it could benefit their community and other communities in the locality, and the opportunities and challenges it could present. Overall, feedback was consistent with the sentiment of the tourism industry with responses being largely positive and no concerns about the potential impact it could have on Connemara as a visitor destination.

Opportunities highlighted by Local Communities:

- Community benefit fund will present local communities with numerous opportunities.
- Job creation within local Connemara communities and how it could help tackle depopulation issues.
- Keep young people living in the area.
- Endorsement of green energy and opportunity for Connemara communities to be leaders in sustainability.
- Identify what specific jobs and skillsets are required to allow for upskilling or training.
- Stimulating the local economy and the additional social knock-on benefits of the offshore windfarm were also recognised by business owners in the community.
- Capitalise on the fact that local communities and tourists alike are more aware of and in support of sustainability today.
- Develop Rossaveel as a centre for turbine construction / assembly for future windfarms as seen internationally e.g. in Scotland.
- Assist communities who are already reliant on grants.
- Benefit local communities who are experiencing high electricity bills.

In terms of opportunities, the main potential benefit highlighted by community representatives was the potential impact of the community benefit fund on local community groups, many of whom are currently reliant on grants.

Community members highlighted employment opportunities and the endorsement of green energy as the other main benefits of the OWF development. Job creation in a locality that is constantly challenged by rural depopulation would therefore permit either existing residents to remain, improve quality of life and/or attract new residents to live in the area.

The identification of the specific jobs and skillsets are required to develop the OWF is seen as crucial in order to allow local people to upskill or train in order to meet any job requirements on the OWF. The potential of developing Rossaveel as a centre for wind turbine construction / assembly was also highlighted and the creation of more long-term jobs in South Connemara. Stimulating the local economy and the additional social knock-on benefits of the offshore windfarm were also recognised by business owners in the community.

From an environmental perspective, community member feedback was extremely welcoming towards the development environmentally as there is a realisation that the country needs to alter its emphasis on fossil fuels to clean and renewable energy sources. It was also highlighted that both local communities and tourists are more aware of the national commitments towards sustainability and climate action and as a result do not impact on perception of the area as a tourism destination. The concerns highlighted by community representatives were consistent the tourism feedback i.e. visual impact, managing the impact on local fishermen in local communities and uncertainty around potential damage to seascape and marine ecosystems.

REPUCON CONSULTING

SECTION FIVE

Tourism Impact Assessment

5.1 Tourism Impact Assessment

This tourism impact assessment examines the potential impacts associated with the development of the Sceirde Rocks Windfarm and associated community investment considered two scenarios:

1. Investment in community projects supporting rural regeneration and tourism development in south Connemara
2. Investment in community projects combined with the potential for a new visitor attraction opening in south Connemara.

The analysis is based on the visitor research applied to the two impact scenarios. The scenarios created for the analysis are supported by the evidence gathered in local consultations, primary research and international research.

Local tourism industry consultations have highlighted opportunities that can be developed, driving the supply side (e.g. delivering new water-based activity enterprises) in the area. The visitor research and secondary research to examine the demand side conditions provides clear evidence that the presence of an OWF is not a deterrent for visitors to visit the area.

Recently there has been local investment in a wide range of community projects and activities that contributes directly and indirectly to tourism in the area. Through the community benefit fund, an annual programme of investment has supported festivals, local organisations and amenities that directly stimulate demand for the local tourism sector or contribute to the visitors experience of the area e.g. enhanced walking trails, local amenities that are not attractors in their own right but add to the overall visitor experience in south Connemara.

Scenario 1 examines the continued investment from the community benefit fund including support for the further development of community tourism activity in the area. This increased tourism offering will elevate the tourism offering above those found currently, increasing both visitor numbers and dwell time spent by visitors in the destination. Potential opportunities identified in consultation include supporting the development of tourism proposition (e.g. walking trails and viewing platforms) in areas where little infrastructure is currently present; the development of eco-tours; and developing educational opportunities around green energy and sustainability to appeal to the FIT visitors, special interest groups and school groups.

The second scenario examines the possibility of the development of a visitor attraction or experience in south Connemara. It builds on the feedback of the tourism industry who highlight the opportunity to develop a visitor attraction or experience linked to the green energy story and maritime culture and heritage of the area. The scenario is based on the assumption that a visitor attraction / experience of mid scale could be created to act as a tourism attractor to the area. Under this scenario, it assumes the investment in such an attraction would have the capacity to attract 75,000 visitors to the area. The model assumes 35% of the annual visitor numbers to the attraction are specifically attracted to the area as a result of the uniqueness of maritime heritage experience and green energy theme (i.e. the economic impact model is based on 35% of visitors who may not have visited the area if the attraction was not in operation). This scenario incorporates the impacts from Scenario 1 and the additionality caused by the community benefit fund investment i.e. additional number of tourists attracted to south Connemara because of events and amenities supported through the community benefit fund.

The tourism impact analysis concentrates on the net economic impact arising under the separate scenarios over the first 15 years of operation. This is focussed on the level of 'additionality' (additional visitor growth in excess of current performance) that investment will bring to the region as opposed to displacing existing tourism business. The analysis does not consider the impact of 'business tourism' associated with the OWF (e.g. transient workforce living in the locality for periods during the construction, operation and maintenance of the windfarm) that may support the tourism economy primarily through accommodation and food service.

Key Assumptions

Limited data exists on current tourism performance and visitor numbers specific to south Connemara. Fáilte Ireland data shows that in 2022, as tourism performance nationally and internationally continues to recover from the COVID19 pandemic, Pearse's Cottage attracted 19,000, while the Emigrants Commemorative Centre in Carna attracted 7,000 visitors. The Connemara Smokehouse welcomed 5,000 visitors in 2022. Fáilte Ireland data also shows Padrig Pearse's Cottage welcomed circa. 25,000 visitors in 2019 with the Connemara Smokehouse attracting 12,000 visitors.

For the purpose of this assessment, a current baseline of 25,000 visitors engaging in visitor experiences and attractions has been assumed. This is based on the visitors who engage with location attractions, activities and saleable experiences. It does not include visitor traffic that does not stop in the area, thereby generating no economic benefit for the local economy.

Projected growth of 4% per annum has been applied to be baseline numbers to estimate visitor numbers at for first year of assessment, assumed to be to be 2029.

The assessment undertaken incorporates responses to the visitor surveys including:

- Proportions of domestic / international visitors
- Proportions of day / overnight visitors staying in the area
- Overnight visitor spend based on Fáilte Ireland Wild Atlantic Way statistics[25]

5.2 Scenario 1 - Investment in Community Projects

Scenario 1 assesses the additionality impact of investment in local community projects supporting tourism development enhancing the range of experiences for visitors to the destination.

Table 5.2.1 - Additional Visitor Projections

	Years 1-5 (cumulative)	Years 6-10 (cumulative)	Years 11-15 (cumulative)	Years 1-15 (cumulative)
Additional Visitors	22,736	33,670	37,175	93,850

Investment in community projects based on an annual contribution by Corio Generation through Fuinneamh Sceirde Teoranta (FST) is projected to deliver an additional 22,750 visitors over the first five years following completion of the project. This additionality is generated through the increased attractiveness of the destination to visitors. Primary research undertaken showed a net gain in visitors who state that the presence of the OWF off the coast of Connemara would have a positive impact on the decision to visit the area. A further uplift in visitors is projected through the increased tourism offering created through investment in community projects benefiting visitors and the local community alike.

[25] *Wild Atlantic Way Regional Tourism Development Strategy 2023 - 2027 (Failte Ireland)*

Table 5.2.2 - Additionality Impact

	Years 1-5 (cumulative)	Years 6-10 (cumulative)	Years 11-15 (cumulative)	Years 1-15 (cumulative)
Bednights	12,277	18,182	20,074	50,533
Overnight Expenditure	€933,072	€1,381,824	€1,525,646	€3,840,542
Direct Visitor Expenditure	€1,302,527	€1,928,965	€2,129,733	€5,361,224
Exchequer Returns (based on direct Expenditure)	€414,204	€613,411	€677,255	€1,704,869

Support for community projects in the south Connemara area is projected to generate an additional 12,300 bednights over the initial five years following completion of the OWF. Continued sustainable growth visitors to the area projects an additional 50,500 bednights in the destination over 15 years following completion of the OWF.

There is an additional €0.9 million in overnight expenditure projected in the area over the initial five years. The level of additional overnight expenditure increases to €1.4 million over years six to ten and an additional €1.5 million in years 11 - 15. There is projected to be an additional €3.8 million of overnight expenditure over 15 years through investment in community projects supporting tourism.

Additional total direct visitor expenditure is projected at €1.3 million in the first five years of assessment. In years six to ten additional direct expenditure is projected to amount to €1.9 million, increasing to €2.1 million over years 11-15. Over the initial 15-year period additional direct expenditure by visitors to the destination is projected to be €5.4 million.

An increase in Exchequer Returns through direct expenditure by visitors of €414,000 is projected over the initial five years. Over a 15 year period additional Exchequer Returns of €1.7 million are projected.

Table 5.2.3 - Additional Tourism Employment Impact

	Year 1	Year 5	Year 10	Year 15
Additional Employment	4	10	11	12

In the opening year, expenditure by additional visitors to the destination is projected to support an additional four jobs. This is based on the Fáilte Ireland statistic of €1 million of visitor expenditure supporting 27 jobs.

By year five expenditure by additional visitors is projected to support 10 more jobs than would be expected without investment in communities. By year 15 an additional 12 jobs are supported.

5.3 Scenario 2 – Community Investment + New Visitor Attraction

Under Scenario 2, community investment is supplemented with the opening of a major new visitor attraction in south Connemara. The attraction is projected to open in year five attracting an initial 75,000 visitors, 35% of whom are new visitors to the destination.

Table 5.3.1 - Additional Visitor Projections

	Years 1-5 (cumulative)	Years 6-10 (cumulative)	Years 11-15 (cumulative)	Years 1-15 (cumulative)
Additional Visitors	48,986	173,008	191,015	413,009

Investment in community projects supplemented by the opening in year five of a major new visitor attraction is projected to deliver an additional 49,000 visitors over the first five years following completion of the project. Over years six to ten there is an additional 173,000 visitors to the destination, increasing to an additional 191,000 over years 11 to 15. Over the 15-year period of assessment there are an estimated 413,000 additional visitors to the destination.

Table 5.3.2 - Additionality Impact

	Years 1-5 (cumulative)	Years 6-10 (cumulative)	Years 11-15 (cumulative)	Years 1-15 (cumulative)
Bednights	26,452	93,425	103,148	223,025
Overnight Expenditure	€2,010,372	€7,100,263	€7,839,264	€16,949,899
Direct Visitor Expenditure	€2,806,389	€9,911,649	€10,943,261	€23,661,299
Exchequer Returns (based on direct Expenditure)	€892,432	€3,151,904	€3,479,957	€7,524,293

Through the development of tourism projects across the south Connemara area and opening (in year five) of a new significant visitor attraction there is an additional 26,500 bednights over the initial five years. Continued sustainable growth visitors to the area projects an additional 223,000 bednights in the destination over 15 years following completion of the OWF.

There is an additional €2.0 million of overnight expenditure projected in the area over the initial five years. With the new visitor attraction opening in year five, the level of additional overnight expenditure increases to €7.1 million over years six to ten and an additional €10.9 million in years 11 - 15. There is projected to be an additional €23.7 million of overnight expenditure over 15 years through investment in tourism projects in the area.

Additional total direct visitor expenditure is projected at €1.3 million in the first five years of assessment. In years six to ten additional direct expenditure is projected to amount to €1.9 million, increasing to €2.1 million over years 11-15. Over the initial 15-year period additional direct expenditure by visitors to the destination is projected to be €5.4 million.

An increase in Exchequer Returns through direct expenditure by visitors of €892,000 is projected over the initial five years. Over a 15-year period additional Exchequer Returns of €7.5 million are projected.

Table 5.3.3 - Additional Tourism Employment Impact

	Year 1	Year 5	Year 10	Year 15
Additional Employment	4	50	55	61

In the opening year, expenditure by additional visitors to the destination is projected to support an additional four jobs. This is based on the Fáilte Ireland statistic of €1million of visitor expenditure supporting 27 jobs.

By year five, expenditure by additional visitors is projected to support 50 more jobs than would be expected without investment in communities. By year 15 an additional 61 jobs are supported.

SECTION SIX

Conclusions

6.1 Conclusions

Based on the visitor research and analysis of previous international research, the development of the Sceirde Rocks OFW will not have an adverse impact on tourism. The visitor research does not suggest an OFW located off the Connemara coast will be detrimental to tourism in the area. Tourism industry and community feedback, specific to the likely tourism impact, recognise the tourism development opportunity it represents for the area.

The independent visitor research clearly demonstrates the minimal impact of the existence of a OWF on visitors' decision to visit an area or how they perceive a coastal tourism destination. The majority of visitors indicated the existence of an OWF would not impact on their experience of Connemara.

At every stage of the 'visitor journey' from pre-visit to the 'in destination' experience, the development of an OWF would not appear to have any negative impact on the tourism sector. 85% of visitors surveyed stated the presence of an OWF off the Connemara coast would not prevent them from considering Connemara as a place to visit. The majority of visitors felt the presence of OWF would have neither a negative or positive impact on the local tourism industry. One third of respondents felt it would have a positive impact compared to 11% who suggested it might have a negative impact.

During the consultation process, stakeholders were asked to rate the potential impact an OWF would have on south Connemara as a tourism destination on a scale of 1-10[26]. The average score amongst the tourism industry was 6.9 out of 10, suggesting an anticipated positive impact. They were also asked to rate on a scale of 1-10[27] how much of an impact an OWF would have on visitor's decision to visit Connemara. The average score amongst the tourism industry was 1.0 out of 10, indicating an OWF in Connemara would not have no impact on a visitor's decision to visit Connemara.

Similarly, community representatives were asked to rate the potential positive impact an OWF would have on south Connemara as a tourism destination on a scale of 1-10[28]. The average score amongst the community members was 7.8 out of 10, surpassing the anticipated impact suggested by the tourism industry. When asked to rate how much of an impact an OWF would have on visitor's decision to visit Connemara, the average score amongst community members was 1.4 out of 10, indicating an OWF in Connemara would not have any impact on a visitor's decision to visit Connemara.

The community feedback highlighted the potential job creation linked to the OFW in a locality that faces the challenges of rural depopulation would make significant contribution the area. It will encourage existing residents to remain in the area, improve quality of life and attract new people to live in the community. Community feedback also highlighted the need to identify the specific jobs and skillsets required. This is considered a crucial outcome from the OWF investment enabling local people to upskill or train to meet any job opportunities that may arise.

The tourism industry feedback focused largely on the potential tourism uplift and how the OWF could grow tourism in the area. Along with new enterprise development opportunities such as boat trips or excursions, possible educational opportunities were also identified as a potential long term outcomes. The tourism industry advocated for benchmarking against other offshore windfarms to understand the potential tourism opportunities it can generate. Members of the tourism industry also suggested visitor numbers could be bolstered by an accompanying onshore museum / educational centre where visitors / school and tour groups could learn about green energy.

The area has a national profile for educational tourism based on the existing Irish language colleges. The experience of international destinations located close to OWF highlights the sustainability education tourism

[26] Where '1' = no positive impact and '10' = very positive impact
[27] Where '1' = won't stop visitors from visiting Connemara and '10' = will strongly stop them visiting
[28] Where '1' = no positive impact and '10' = very positive impact

opportunity that exists. It can build on the existing profile for niche educational tourism and grow the areas reputation for special interest tourism and activities linked to the OFW, sustainability and community tourism. The existence of the Club Mara and its social enterprise focus on training water activity skills adds an additional dimension to the special interest education tourism opportunity for the area.

South Connemara currently experiences accommodation supply challenges. In a normalised market supply situation, the area stills lags behind north Connemara in terms of available bedstock. The construction phase of the Sceirde Rocks OFW has the potential to stimulate local confidence in investment in the local accommodation product. A significant legacy for the area is the potential to grow available accommodation in the area to accommodate construction workers and over time more tourism focused accommodation. The ability to retain an increased share of visitor spend in south Connemara will be contingent on growing the level of accommodation across the area.

There is universal agreement from both tourism industry and community perspective that the construction of an offshore windfarm would have little or no impact on tourism and visitors' decision to come to South Connemara. Overall, a largely positive yet cautious outlook dominated the feedback. From a community consultation perspective, the main hesitancy lies in the visual impact, especially from those living close to the shoreline. Community members highlighted employment opportunities and potential access to green energy as the chief benefits of the offshore windfarm development.

Previous research conducted in Ireland and overseas suggests the impact of OWF's on tourism destinations is relatively benign, and in some cases positive. In many locations as illustrated throughout the international examples, OWF's have emerged as tourism attractions in their own by virtue of their modern and innovative design. The findings of the research examined suggest OWF's do not impact on coastal areas as tourism destinations. The results of Irish studies mirror the findings of the primary research conducted within this assessment process. The 2024 Repucon Consulting research suggests the majority of visitors to Connemara would not avoid visiting the destination due to the presence of an offshore wind farm while the majority of visitors would consider Connemara to be a more sustainable destination due to the existence of an OWF.

Similar to the evidence of the international research, local feedback is also conscious of possible visual impact and possible risks to the marine biodiversity in the area. The experience of other coastal tourism destinations in managing these risks have resulted in net gains for the tourism sector. It is anticipated the same will arise in south Connemara based on visitor feedback and the enterprise development opportunities highlighted by the tourism industry.

One of the perceived risks associated with OFW is the possible impact of the destination reputation as a place to visit. The research clearly demonstrates visitors would not be deterred from considering a holiday or visit to Connemara on the basis of a OFW located off the coast. In many instances internationally, and with a growing public awareness of climate action commitments, OWF's enhance an areas profile as a sustainable tourism destination. It will be essential that the tourism industry leverage this sustainability association. It should strive to build on the opportunity to further enhance the areas profile as a sustainable coastal tourism destination which will manifest itself through the variety of coastal tourism activities accessible in south Connemara.

The evidence of the research and consultations suggest no negative tourism impact on south Connemara. The tourism impact assessment is based on a holistic approach that included the views of the visitor, tourism industry and local community. At a destination level, the feedback suggests the development of an OWF could contribute to growing the value of tourism in the area while also increasing the area's profile as a sustainable tourism destination. From a supply side, the tourism industry feedback suggests a possible growth in new tourism enterprises based on the OWF. This includes an increase in activity providers, development of a visitor attraction linked to the OWF theme and a growth in local bedstock to accommodate the business tourism opportunity during construction. From a visitor demand perspective, the research has clearly demonstrated that there is minimal risk to annual tourism performance. Visitors were not concerned about the existence of OWF in the area. A considerable proportion of domestic and international visitors suggest it could enhance the appeal of the area. Overall, the international research combined with the local consultations and visitor sentiment suggests the tourism performance of south Connemara will not be affected by the development of a OFW.

APPENDIX ONE

Socio-Economic Profiles

Socio Economic Context of Connemara – Connemara North LEA and Connemara South LEA

Population

	2016			2022			% Change 2016-2022
Population	**Male**	**Female**	**Total**	**Male**	**Female**	**Total**	**%**
Connemara	19,202	19,330	38,532	20,603	20,795	41,398	7.4%

Age Profile

	2016				2022			
Age Group	**M**	**F**	**Total**		**M**	**F**	**Total**	
0 - 4	1,175	1,130	2,305	6.0%	1,114	1,033	2,147	5.2%
5 - 9	1,347	1,367	2,714	7.0%	1,341	1,249	2,590	6.3%
10 - 14	1,405	1,343	2,748	7.1%	1,485	1,454	2,939	7.1%
15 - 19	1,373	1,268	2,641	6.9%	1,439	1,405	2,844	6.9%
20 - 24	901	825	1,726	4.5%	1,071	863	1,934	4.7%
25 - 29	816	847	1,663	4.3%	807	810	1,617	3.9%
30 - 34	936	1,050	1,986	5.2%	993	1,047	2,040	4.9%
35 - 39	1,174	1,324	2,498	6.5%	1,182	1,340	2,522	6.1%
40 - 44	1,393	1,459	2,852	7.4%	1,335	1,541	2,876	6.9%
45 - 49	1,398	1,496	2,894	7.5%	1,499	1,571	3,070	7.4%
50 - 54	1,341	1,409	2,750	7.1%	1,446	1,583	3,029	7.3%
55 - 59	1,385	1,358	2,743	7.1%	1,377	1,444	2,821	6.8%
60 – 64	1,341	1,202	2,543	6.6%	1,416	1,367	2,783	6.7%
65+	3,217	3,252	6,469	16.8%	4,098	4,088	8,186	19.8%
Total	**19,202**	**19,330**	**38,532**	**100%**	**20,603**	**20,795**	**41,398**	**100.0%**

Employment

Connemara	2016				2022			
Principal Economic Status	Male	Female	Total	%	Male	Female	Total	%
At Work	7,931	7,349	15,280	49.7%	9,176	8,378	17,554	52.1%
Looking for first regular job	111	90	201	0.7%	122	92	214	0.6%
Unemployed having lost or given up previous job	1,557	816	2,373	7.7%	855	639	1,494	4.4%
Student	1,747	1,719	3,466	11.3%	1,829	1,885	3,714	11.0%
Looking after home / family	296	2,383	2,679	8.7%	335	1,814	2,149	6.4%
Retired	2,886	2,492	5,378	17.5%	3,482	3,377	6,859	20.3%
Unable to work due to permanent sickness or disability	698	569	1,267	4.1%	737	709	1,446	4.3%
Other	49	72	121	0.4%	127	165	292	0.9%
Total	**15,275**	**15,490**	**30,765**	**100.0%**	**16,663**	**17,059**	**33,722**	**100.0%**

Social Class

Connemara	2016				2022			
Social Class	**Male**	**Female**	**Total**	**%**	**Male**	**Female**	**Total**	**%**
Professional workers	1,978	1,622	3,600	9.3%	2,459	2,156	4,615	11.1%
Managerial and technical	4,982	6,018	11,000	28.5%	5,954	7,127	13,081	31.6%
Non-manual	2,143	3,630	5,773	15.0%	2,227	3,565	5,792	14.0%

Skilled manual	3,392	1,884	5,276	13.7%	3,599	1,686	5,285	12.8%
Semi-skilled	2,287	2,026	4,313	11.2%	2,378	2,293	4,671	11.3%
Unskilled	1,026	592	1,618	4.2%	988	563	1,551	3.7%
All others gainfully occupied and unknown	3,394	3,558	6,952	18.0%	2,998	3,405	6,403	15.5%
Total	**19,202**	**19,330**	**38,532**	**100.0%**	**20,603**	**20,795**	**41,398**	**100.0%**

Occupations

Connemara		**2016**				**2022**		
Occupations	**Male**	**Female**	**Total**	**%**	**Male**	**Female**	**Total**	**%**
Managers, Directors and Senior Officials	773	585	1,358	7.7%	930	660	1,590	8.3%
Professional Occupations	1,445	2,036	3,481	19.7%	1,817	2,521	4,338	22.8%
Associate Professional and Technical Occupations	940	757	1,697	9.6%	1,073	922	1,995	10.5%
Administrative and Secretarial Occupations	275	1,302	1,577	8.9%	306	1,314	1,620	8.5%
Skilled Trades Occupations	2,573	285	2,858	16.2%	2,479	294	2,773	14.6%
Caring, Leisure and Other Service Occupations	245	1,132	1,377	7.8%	294	1,137	1,431	7.5%
Sales and Customer Service Occupations	263	600	863	4.9%	272	598	870	4.6%
Process, Plant and Machine Operatives	1,020	268	1,288	7.3%	995	320	1,315	6.9%
Elementary Occupations	933	551	1,484	8.4%	935	526	1,461	7.7%
Not stated	1,021	649	1,670	9.5%	930	725	1,655	8.7%
Total	**9,488**	**8,165**	**17,653**	**100.0%**	**10,031**	**9,017**	**19,048**	**100.0%**

Industries

Connemara	2016				2022			
Industries	**Male**	**Female**	**Total**	**%**	**Male**	**Female**	**Total**	**%**
Agriculture, forestry and fishing	698	84	782	5.1%	680	80	760	4.3%
Building and construction	852	44	896	5.9%	1,049	72	1,121	6.4%
Manufacturing industries	1,108	504	1,612	10.5%	1,272	672	1,944	11.1%
Commerce and trade	1,229	1,332	2,561	16.8%	1,547	1,528	3,075	17.5%
Transport and communications	814	372	1,186	7.8%	952	418	1,370	7.8%
Public administration	402	370	772	5.1%	521	456	977	5.6%
Professional services	1,269	3,131	4,400	28.8%	1,511	3,618	5,129	29.2%
Other	1,559	1,512	3,071	20.1%	1,644	1,534	3,178	18.1%
Total	**7,931**	**7,349**	**15,280**	**100.0%**	**9,176**	**8,378**	**17,554**	**100.0%**

Education

Connemara	2016				2022			
Highest Level of Education Completed	**Male**	**Female**	**Total**	**%**	**Male**	**Female**	**Total**	**%**
No formal education	312	221	533	2.1%	579	346	925	3.3%
Primary education	2,250	1,484	3,734	14.5%	1,622	1,048	2,670	9.5%
Lower secondary	2,033	1,491	3,524	13.7%	1,934	1,401	3,335	11.8%
Upper secondary	2,015	2,189	4,204	16.3%	2,219	2,327	4,546	16.1%
Technical or vocational qualification	834	1,126	1,960	7.6%	826	1,115	1,941	6.9%
Advanced certificate/Completed apprenticeship	792	465	1,257	4.9%	968	443	1,411	5.0%
Higher certificate	500	731	1,231	4.8%	636	908	1,544	5.5%
Ordinary bachelor degree or national diploma	908	1,268	2,176	8.5%	1,028	1,417	2,445	8.7%
Honours bachelor degree, professional qualification or both	1,058	1,448	2,506	9.7%	1,498	1,997	3,495	12.4%
Postgraduate diploma or degree	1,086	1,660	2,746	10.7%	1,459	2,248	3,707	13.2%
Doctorate(Ph.D) or higher	270	200	470	1.8%	343	273	616	2.2%
Not stated	683	697	1,380	5.4%	800	751	1,551	5.5%
Total	**12,741**	**12,980**	**25,721**	**100.0%**	**13,912**	**14,274**	**28,186**	**100.0%**

Socio Economic Context of South Connemara – 26 Electoral Divisions (Census 2022)
Population

2022 Population	Male	Female	Total
South Connemara	12,059	12,303	24,362

Age Profile

	South Connemara - 2022			
Age Group	**M**	**F**	**Total**	
0 - 4	611	596	1,207	**5.0%**
5 - 9	783	729	1,512	**6.2%**
10 - 14	875	869	1,744	**7.2%**
15 - 19	789	759	1,548	**6.4%**
20 - 24	594	505	1,099	**4.5%**
25 - 29	486	472	958	**3.9%**
30 - 34	571	622	1,193	**4.9%**
35 - 39	662	762	1,424	**5.8%**
40 - 44	798	973	1,771	**7.3%**
45 - 49	878	947	1,825	**7.5%**
50 - 54	835	924	1,759	**7.2%**
55 - 59	813	818	1,631	**6.7%**
60 - 64	839	825	1,664	**6.8%**
65 +	2,525	2,502	5,027	**20.6%**
Total	**12,059**	**12,303**	**24,362**	**100%**

Employment

South Connemara		2022		
Principal Economic Status	Male	Female	Total	%
At Work	5,177	4,871	10,048	**50.5%**
Looking for first regular job	83	63	146	**0.7%**
Short Term Unemployed	201	156	357	**1.8%**
Long Term Unemployed	323	241	564	**2.8%**
Student	1,008	1,049	2,057	**10.3%**
Looking after home / family	243	1,100	1,343	**6.7%**
Retired	2,183	2,084	4,267	**21.4%**
Unable to work due to permanent sickness or disability	485	446	931	**4.7%**
Other	87	99	186	**0.9%**
Total	**9,790**	**10,109**	**19,899**	**100.0%**

Social Class

South Connemara	2022			
Social Class	**Male**	**Female**	**Total**	**%**
Professional workers	1,421	1,256	2,677	**11.0%**
Managerial and technical	3,374	4,085	7,459	**30.6%**
Non-manual	1,284	2,051	3,335	**13.7%**
Skilled manual	2,064	1,007	3,071	**12.6%**
Semi-skilled	1,352	1,400	2,752	**11.3%**
Unskilled	672	404	1,076	**4.4%**
All others gainfully occupied and unknown	1,892	2,100	3,992	**16.4%**
Total	**12,059**	**12,303**	**24,362**	**100.0%**

Occupations

South Connemara	2022			
Occupations	**Male**	**Female**	**Total**	**%**
Managers, Directors and Senior Officials	511	382	893	**8.1%**
Professional Occupations	1.032	1,476	2,508	**22.9%**
Associate Professional and Technical Occupations	600	518	1,118	**10.2%**
Administrative and Secretarial Occupations	176	729	905	**8.3%**
Skilled Trades Occupations	1,372	144	1,516	**13.8%**
Caring, Leisure and Other Service Occupations	166	692	858	**7.8%**
Sales and Customer Service Occupations	153	356	509	**4.6%**
Process, Plant and Machine Operatives	568	195	763	**7.0%**
Elementary Occupations	519	303	822	**7.5%**
Not stated	604	473	1,077	**9.8%**
Total	**5,701**	**5,268**	**10,969**	**100.0%**

Industries

South Connemara	2022			
Industries	**Male**	**Female**	**Total**	**%**
Agriculture, forestry and fishing	348	38	386	**3.8%**
Building and construction	630	36	666	**6.6%**
Manufacturing industries	707	395	1,102	**11.0%**
Commerce and trade	909	899	1,808	**18.0%**
Transport and communications	539	302	841	**8.4%**
Public administration	304	276	580	**5.8%**
Professional services	829	2,077	2,906	**28.9%**
Other	911	848	1,759	**17.5%**
Total	**5,177**	**4,871**	**10,048**	**100.0%**

Education

South Connemara	2022			
Highest Level of Education Completed	**Male**	**Female**	**Total**	**%**
No formal education	404	251	655	**3.9%**
Primary education	1,020	669	1,689	**10.1%**
Lower secondary	1,174	895	2,069	**12.4%**
Upper secondary	1,269	1,369	2,638	**15.8%**
Technical or vocational qualification	493	641	1,134	**6.8%**
Advanced certificate/Completed apprenticeship	576	271	847	**5.1%**
Higher certificate	350	519	869	**5.2%**
Ordinary bachelor degree or national diploma	566	796	1,362	**8.1%**
Honours bachelor degree, professional qualification or both	891	1,155	2,046	**12.2%**
Postgraduate diploma or degree	843	1,317	2,160	**12.9%**
Doctorate(Ph.D) or higher	176	139	315	**1.9%**
Not stated	468	460	928	**5.6%**
Total	**8,230**	**8,482**	**16,712**	**100.0%**

APPENDIX TWO

Visitor Survey Analysis

REPUCON CONSULTING

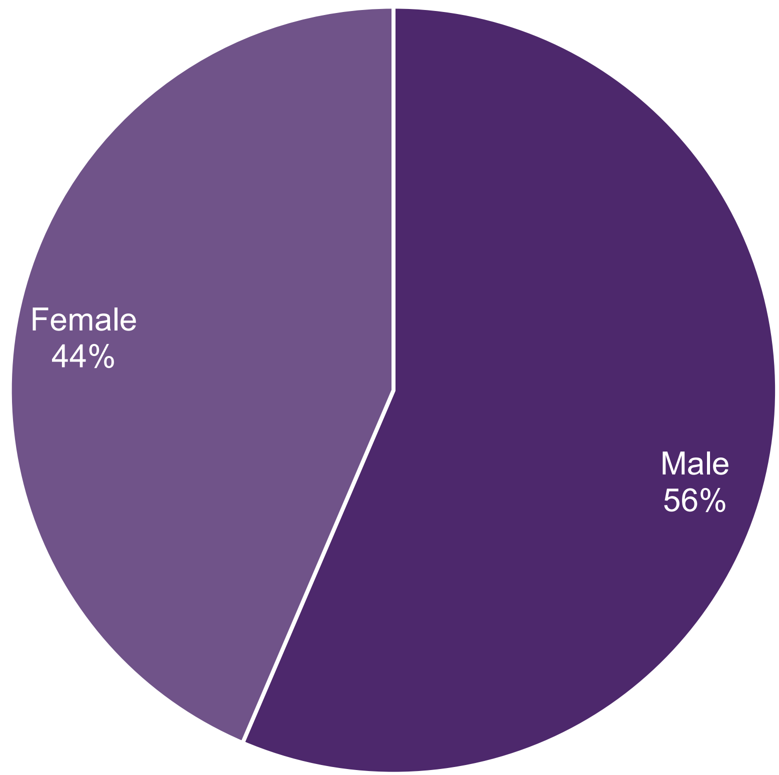
SCEIRDE ROCKS OFW VISITOR SURVEY

BASED ON 212 RESPONSES

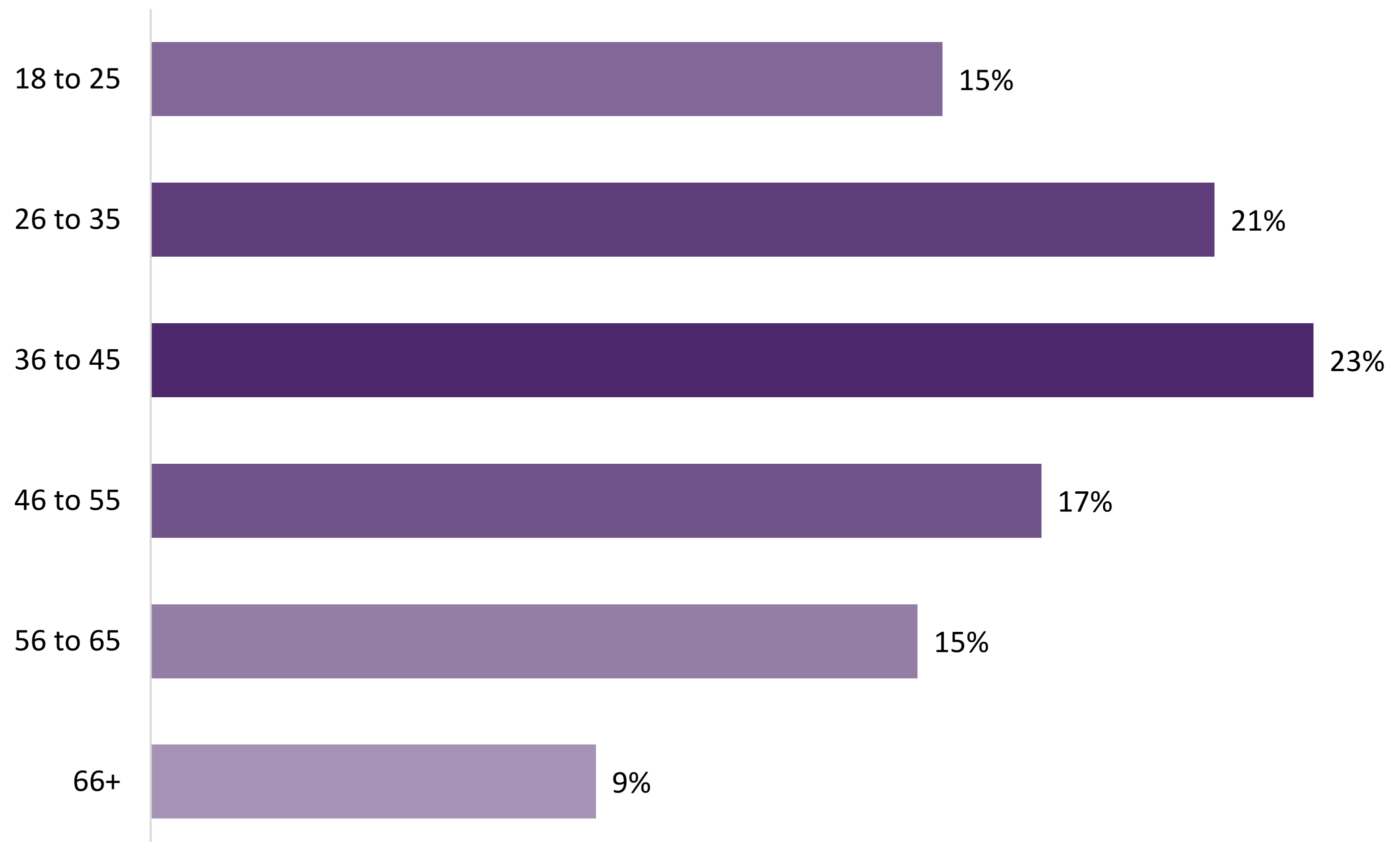
REPUCON CONSULTING

VISITOR PROFILE

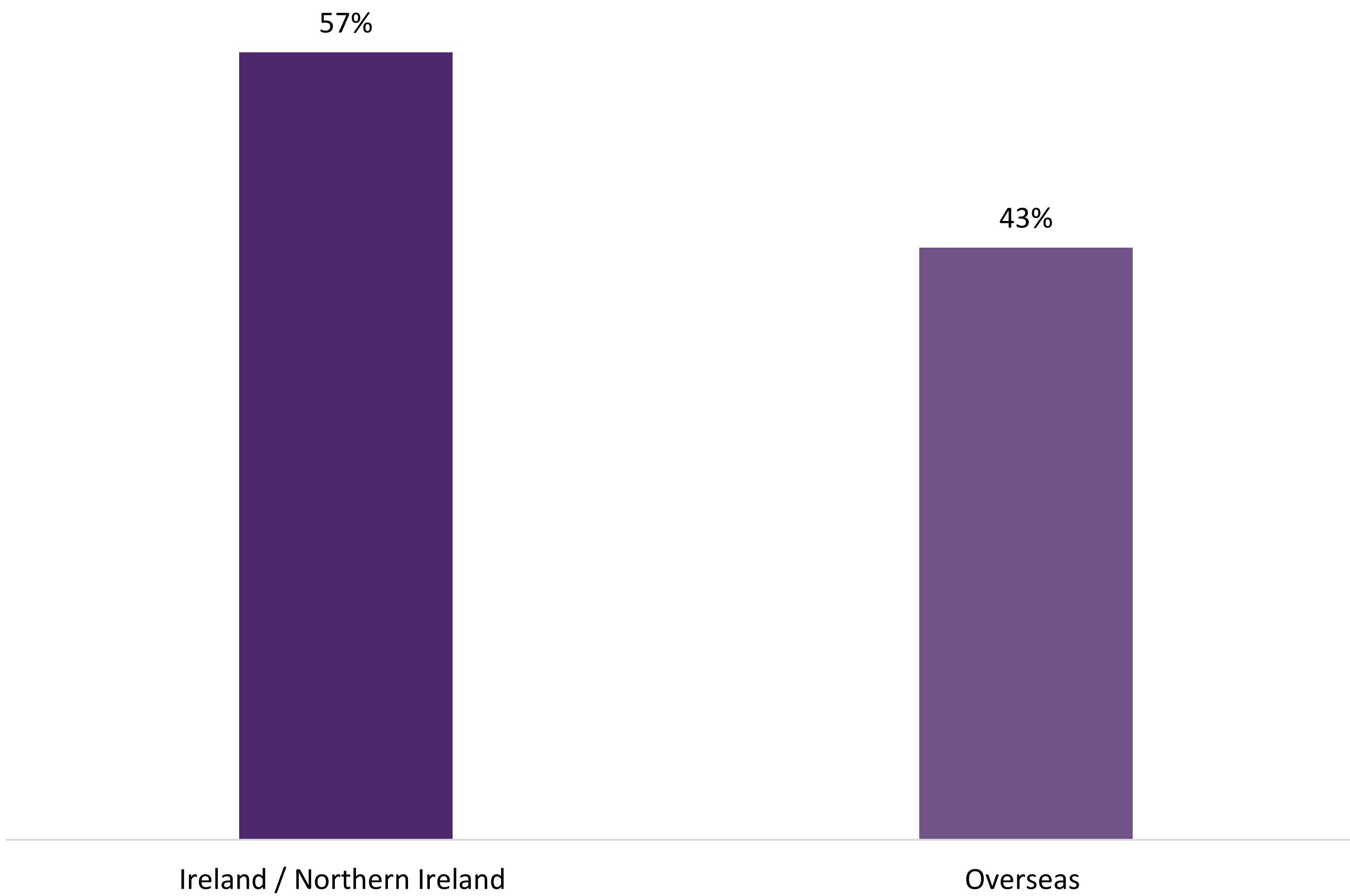
GENDER OF VISITORS



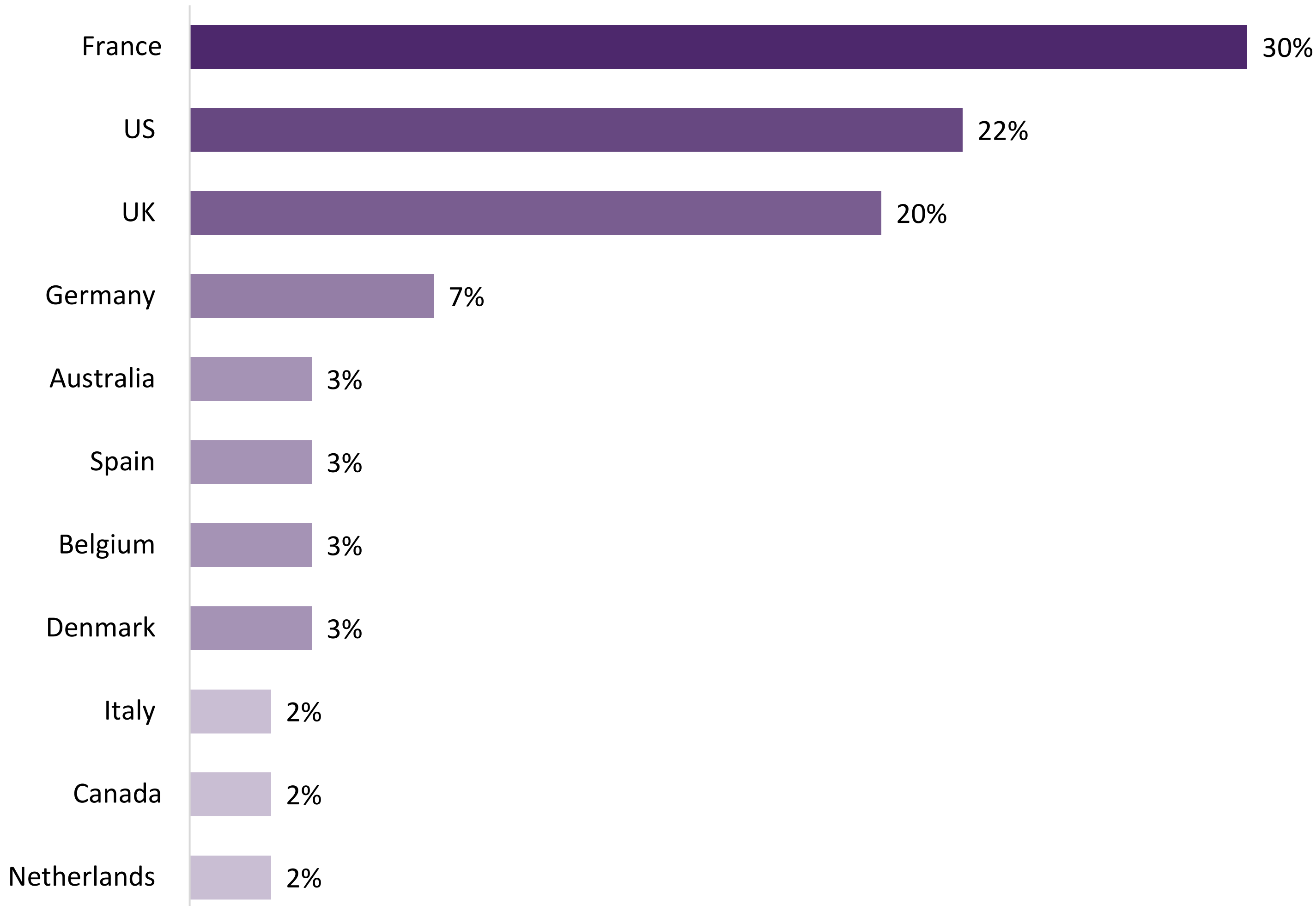
AGE CATEGORY



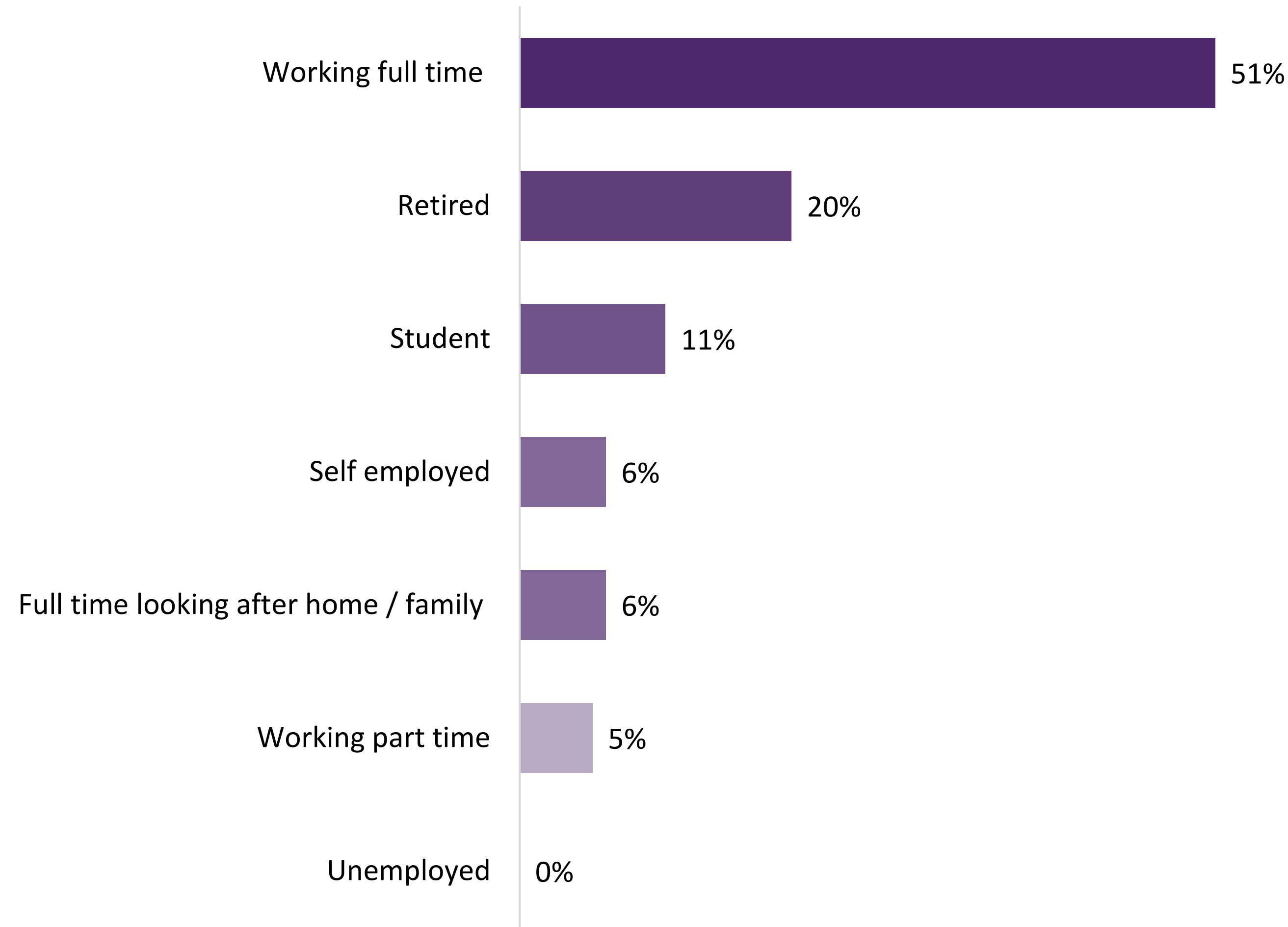
WHERE VISITORS LIVE



COUNTRY OVERSEAS VISITORS ARE FROM



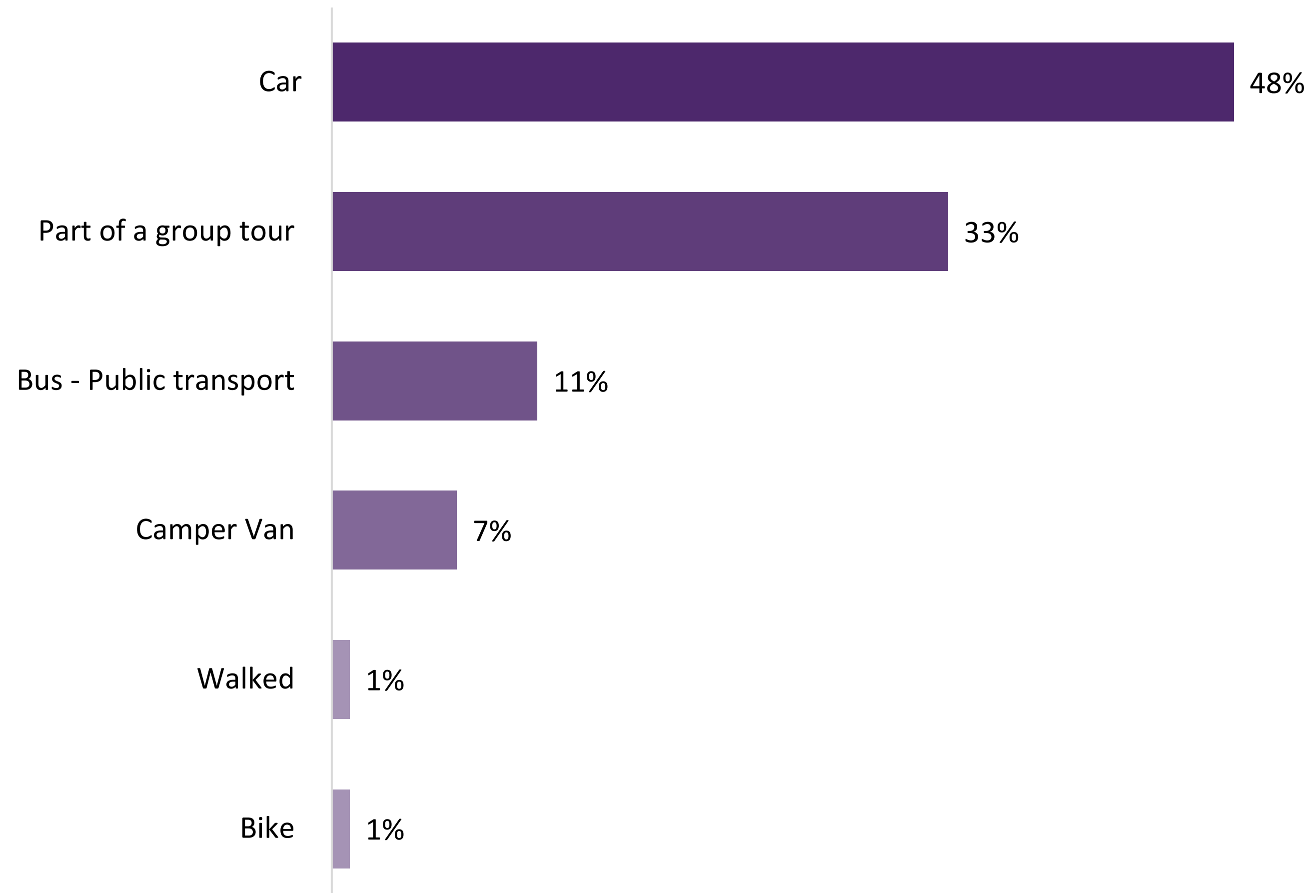
EMPLOYMENT STATUS OF VISITORS



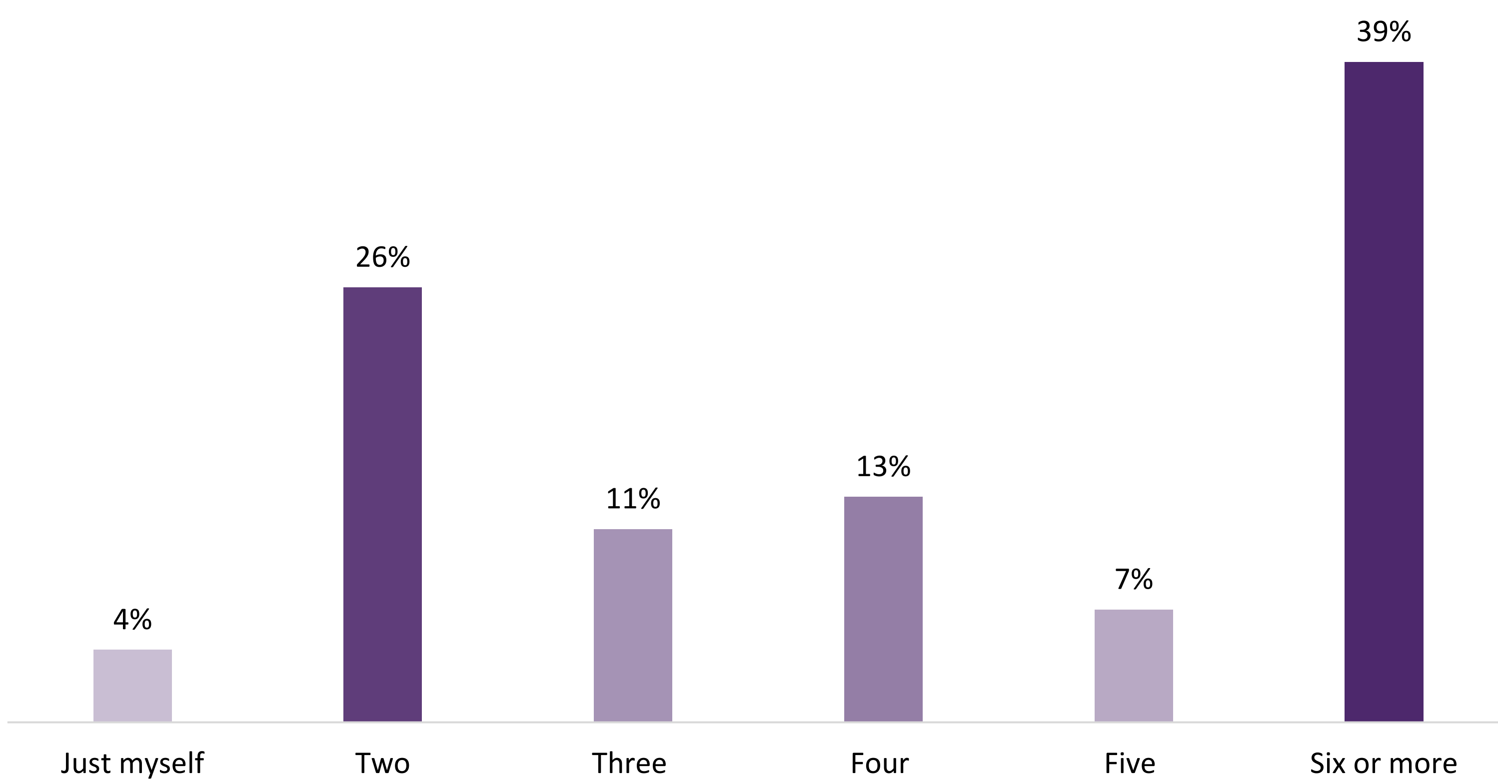
REPUCON
CONSULTING

VISITOR TRAVEL PATTERNS

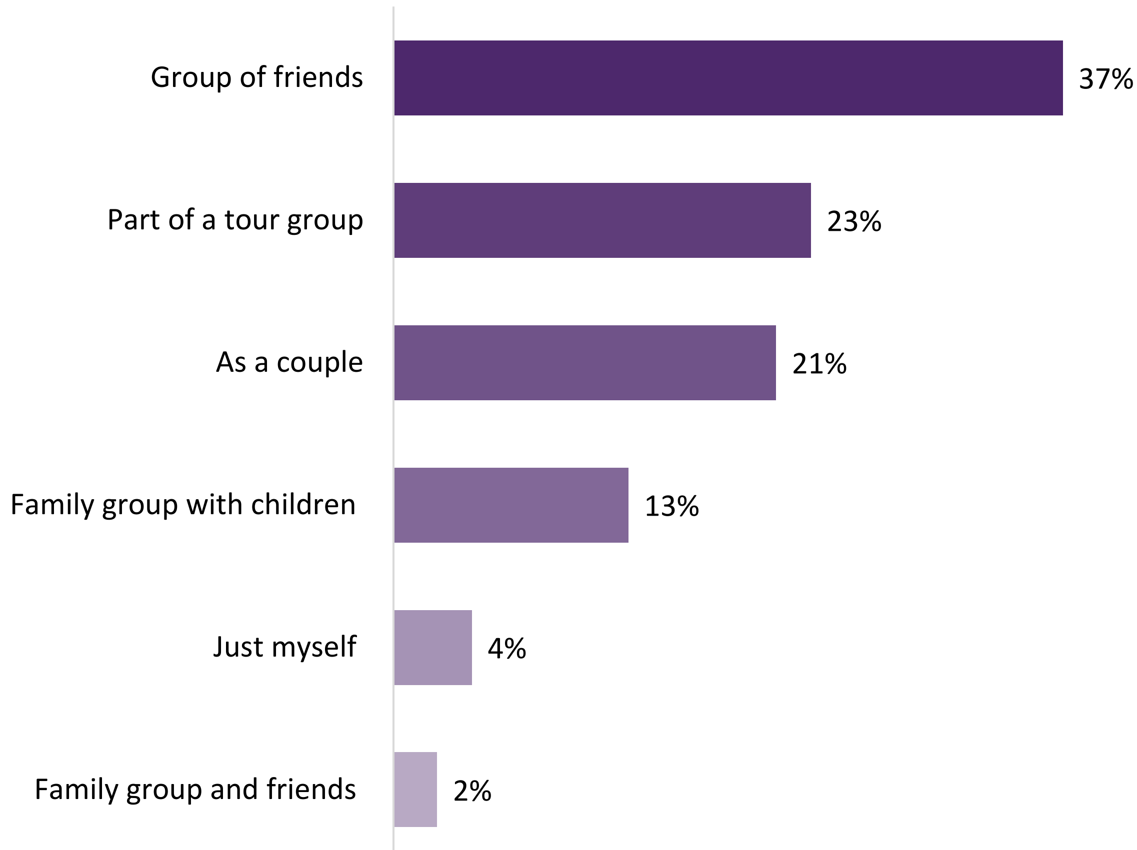
HOW VISITORS TRAVELLED TO CONNEMARA



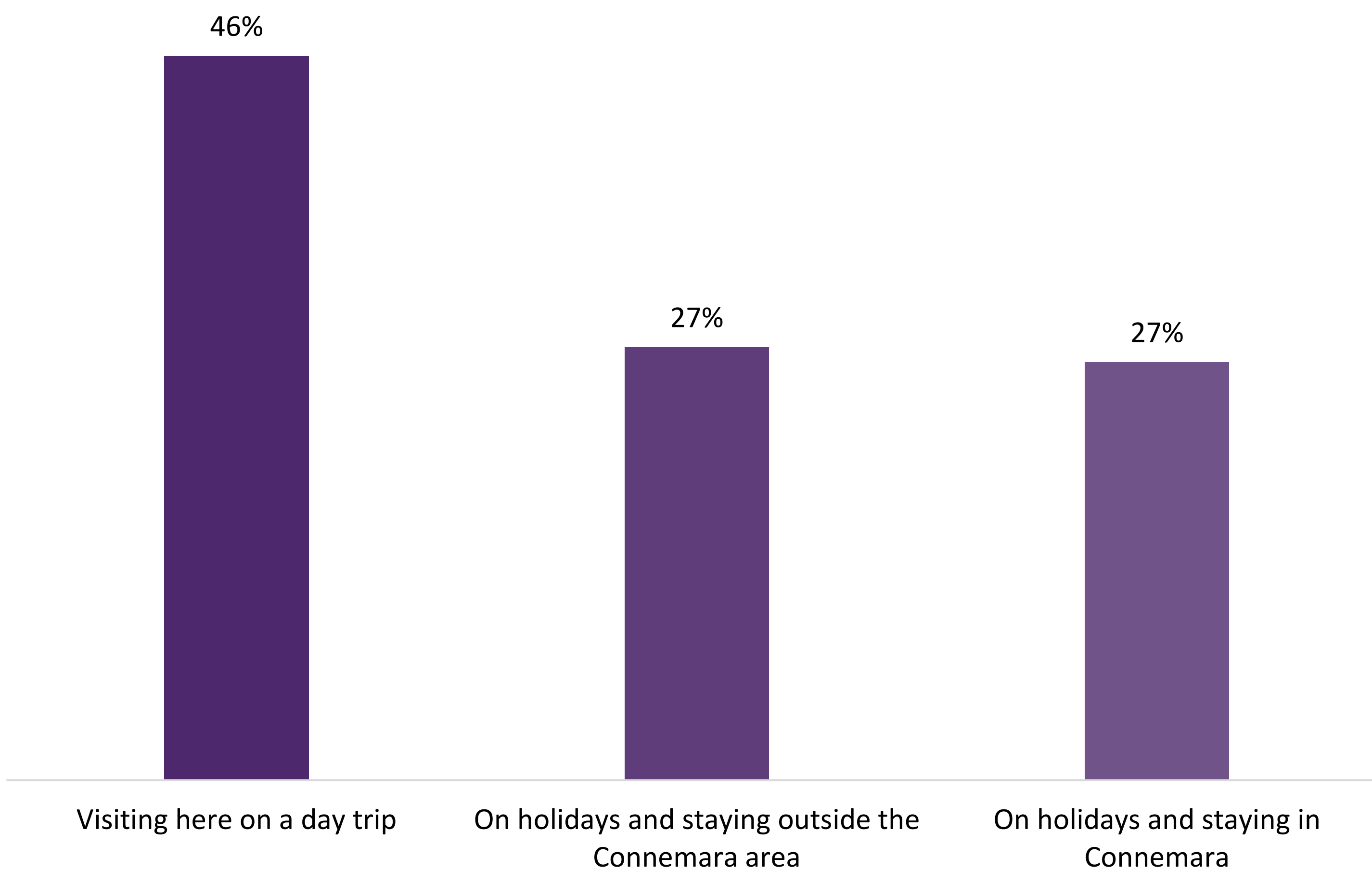
NUMBER OF PEOPLE VISITORS TRAVELLED WITH DURING THEIR VISIT TO CONNEMARA



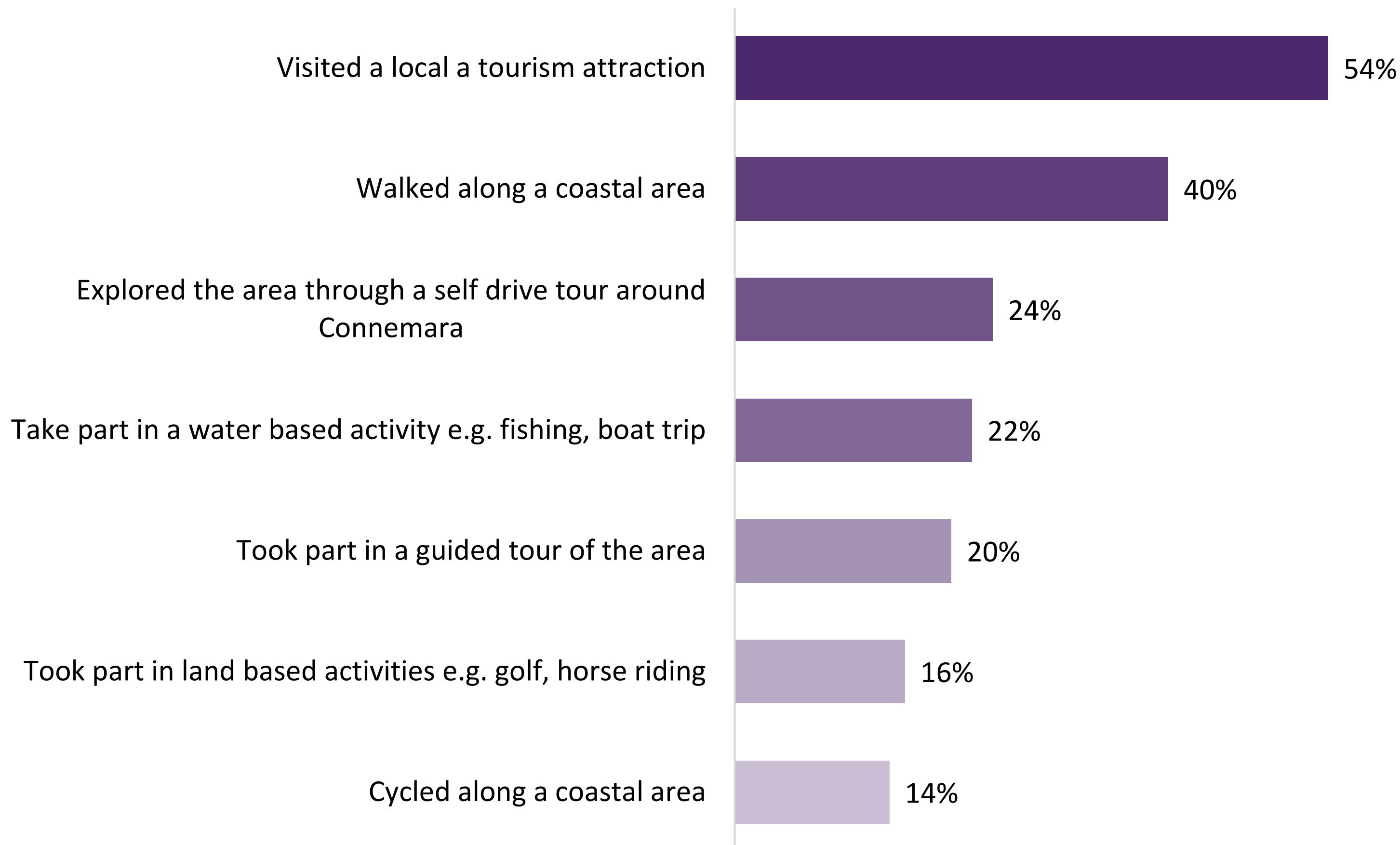
WHO VISITORS TRAVELLED WITH



TYPE OF VISIT



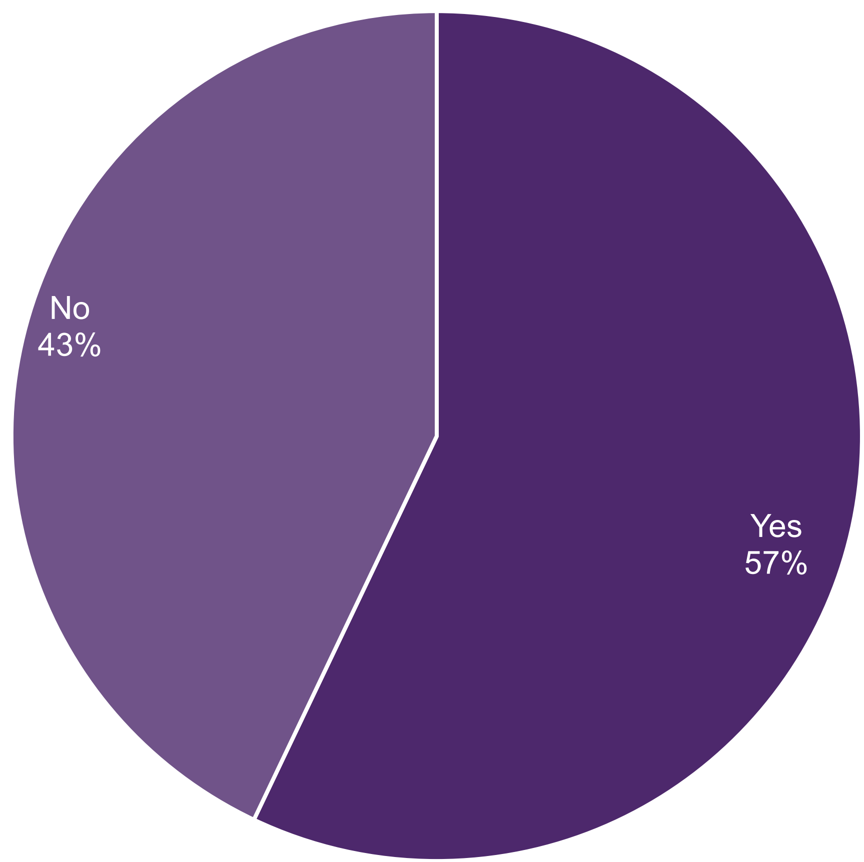
ACTIVITIES VISITORS TOOK PART IN DURING THEIR VISIT TO CONNEMARA



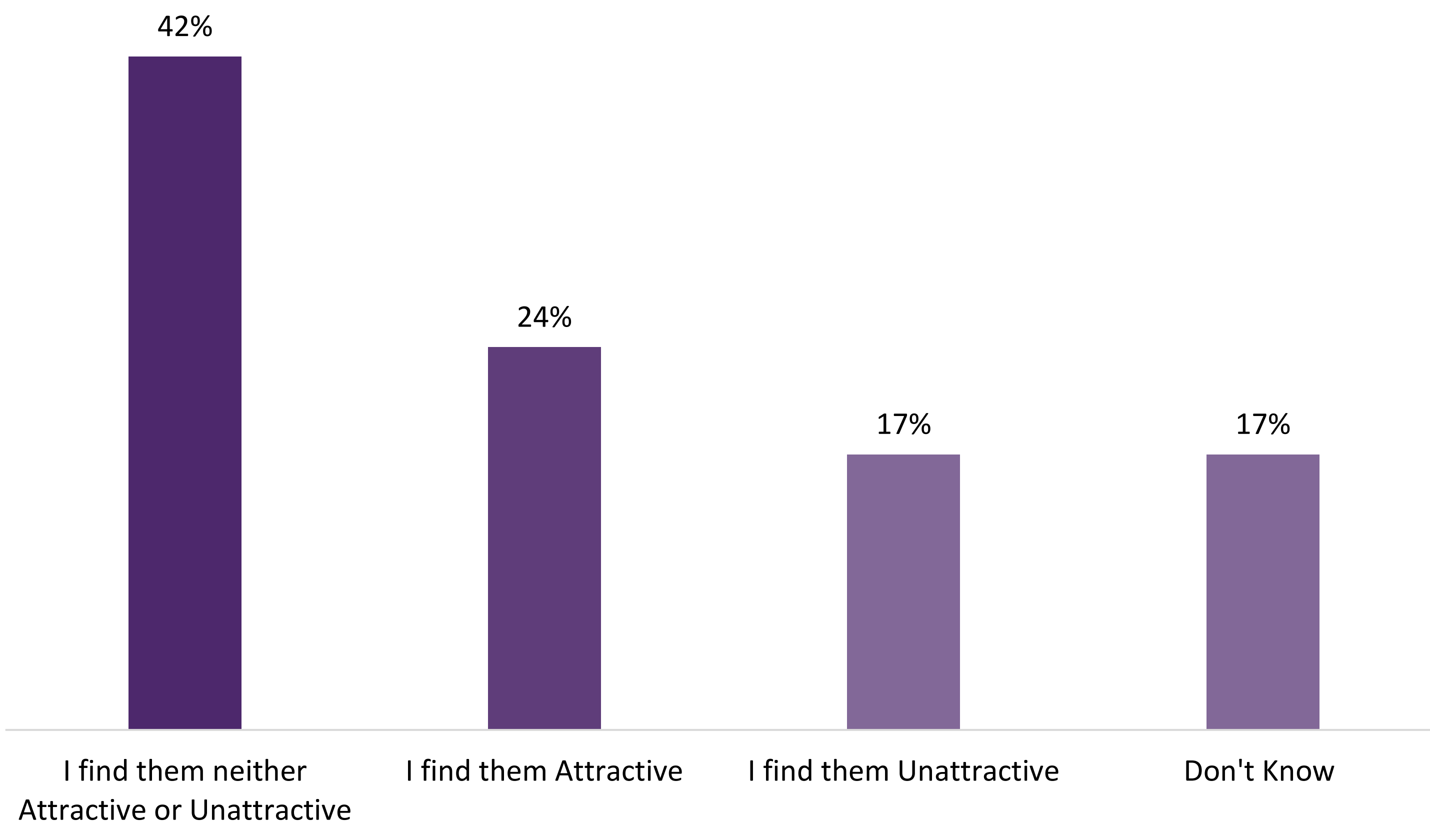
REPUCON CONSULTING

VISITOR ATTITUDES TOWARDS OFFSHORE WINDFARMS

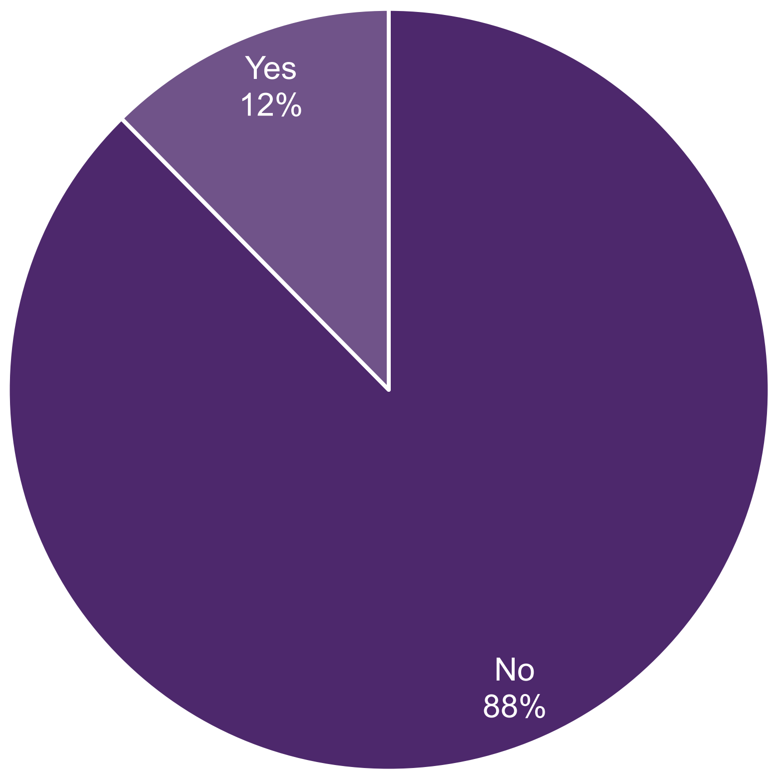
HAVE VISITORS EVER SEEN AN OFFSHORE WIND FARM IN PERSON



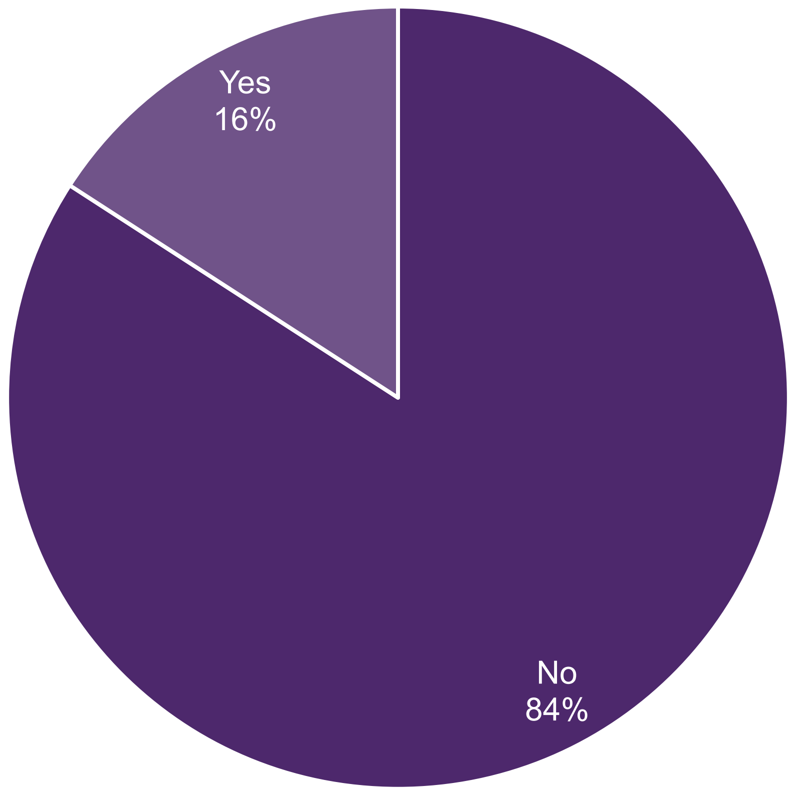
HOW VISITORS FIND THE VISUAL ATTRACTIVENESS OF OFFSHORE WIND FARMS



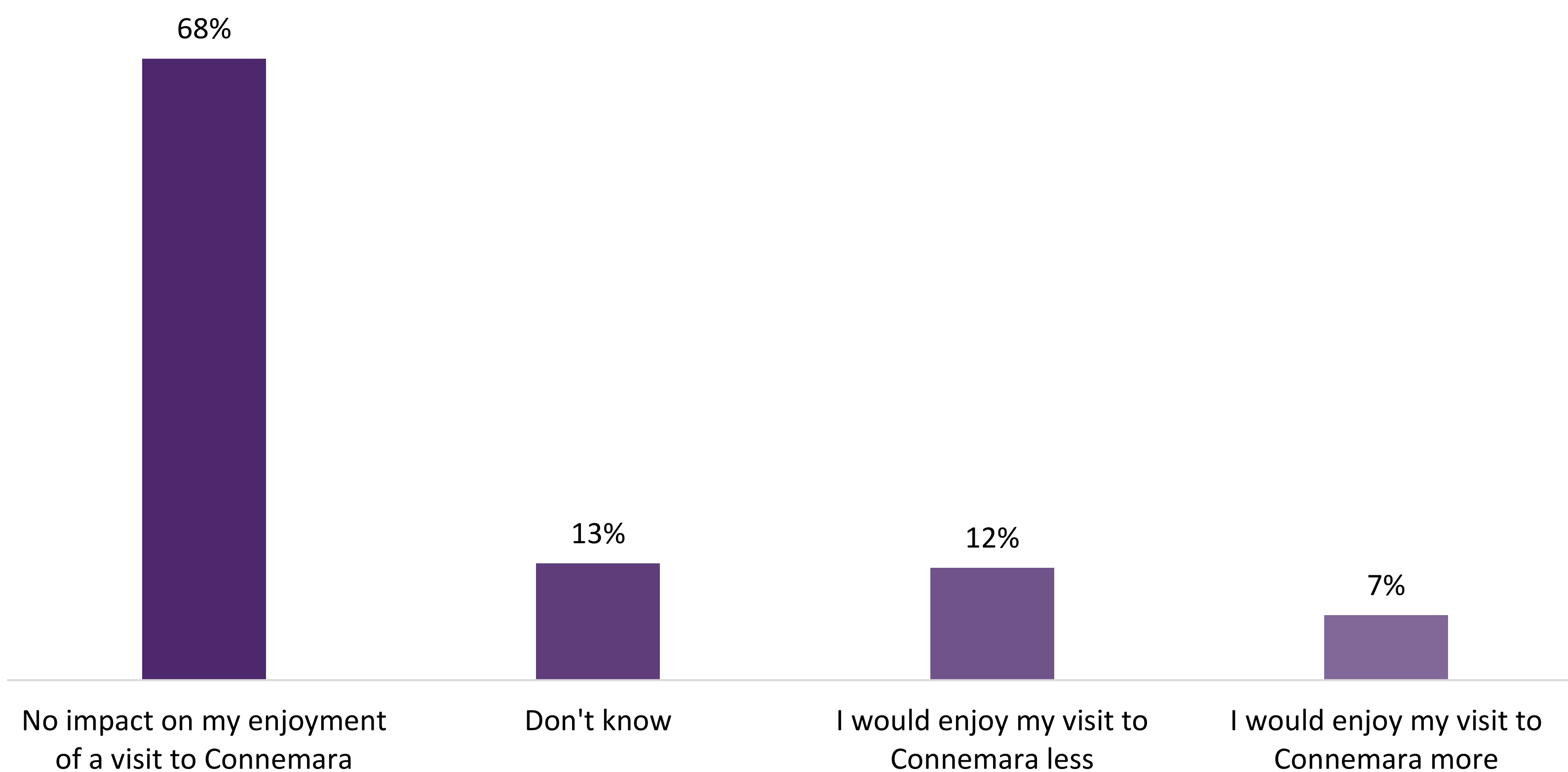
HAVE VISITORS EVER AVOIDED A COASTAL DESTINATION BECAUSE THEY WERE AWARE THERE WAS AN OWF NEARBY



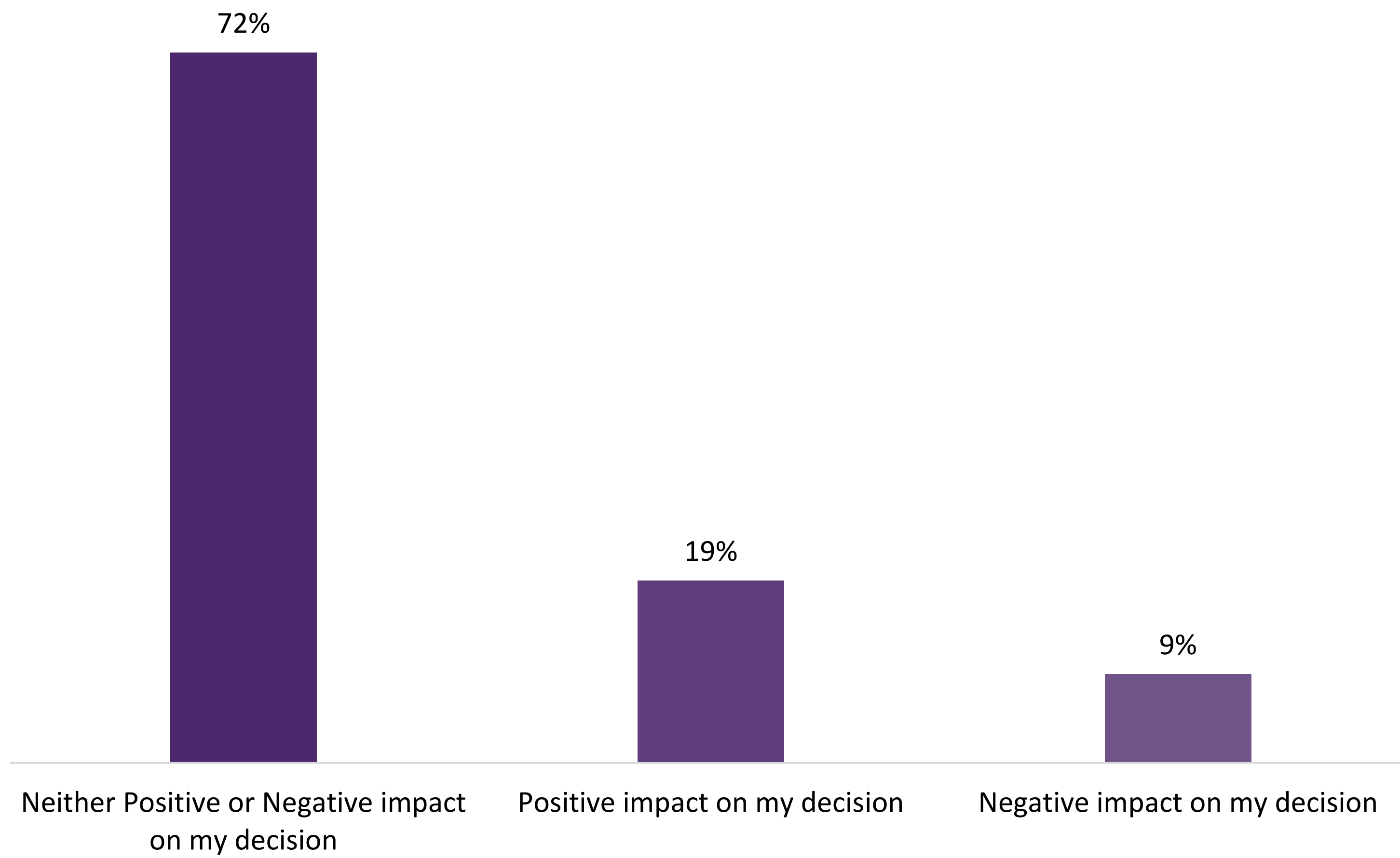
WOULD THE PRESENCE OF AN OFW LOCATED APPROX. 5KM OFF THE COAST OF CONNEMARA STOP VISITORS FROM VISITING THE AREA



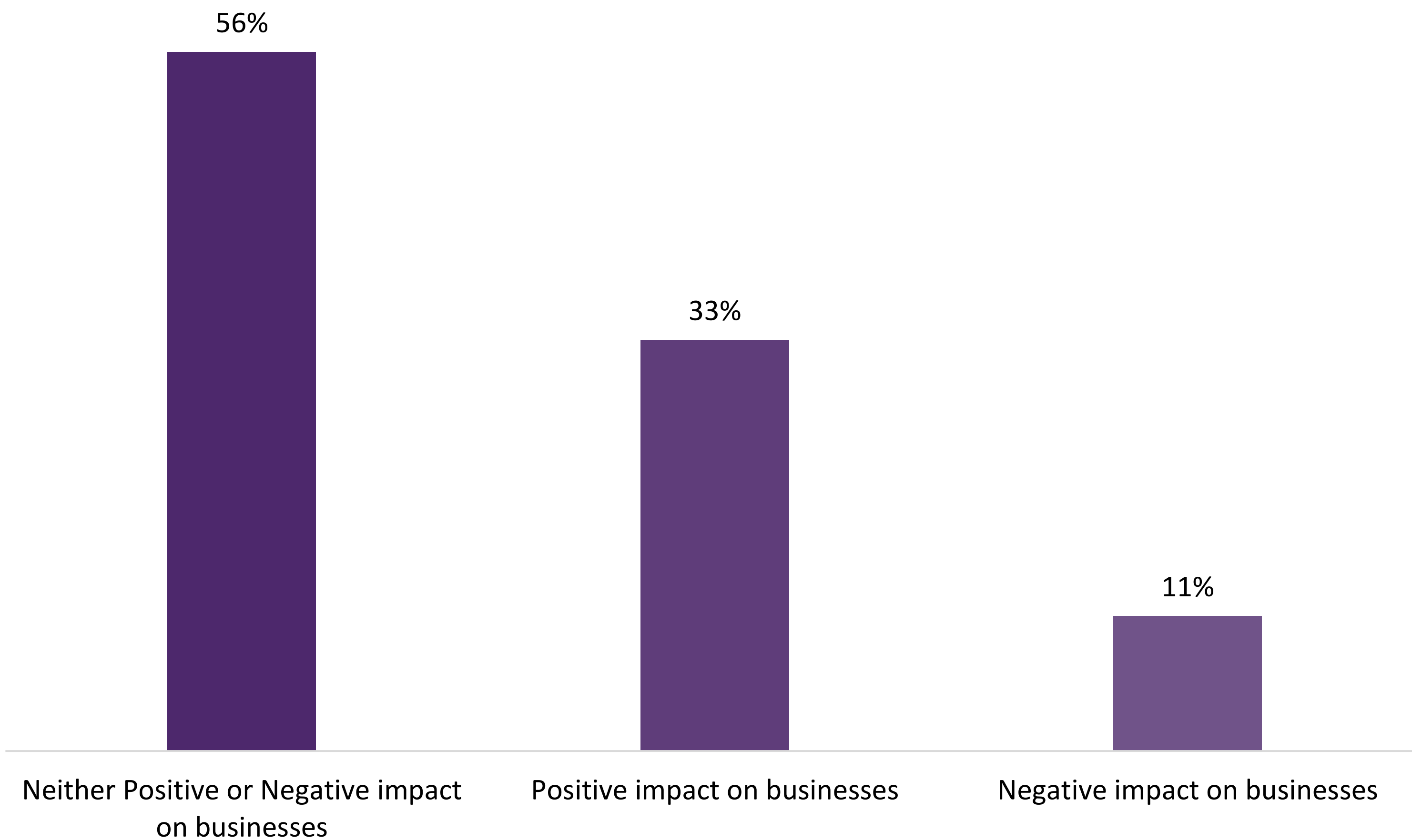
WOULD THE PRESENCE OF AN OFW LOCATED APPROX. 5KM OFF THE COAST OF CONNEMARA IMPACT VISITORS ENJOYMENT OF A HOLIDAY / VISIT TO CONNEMARA



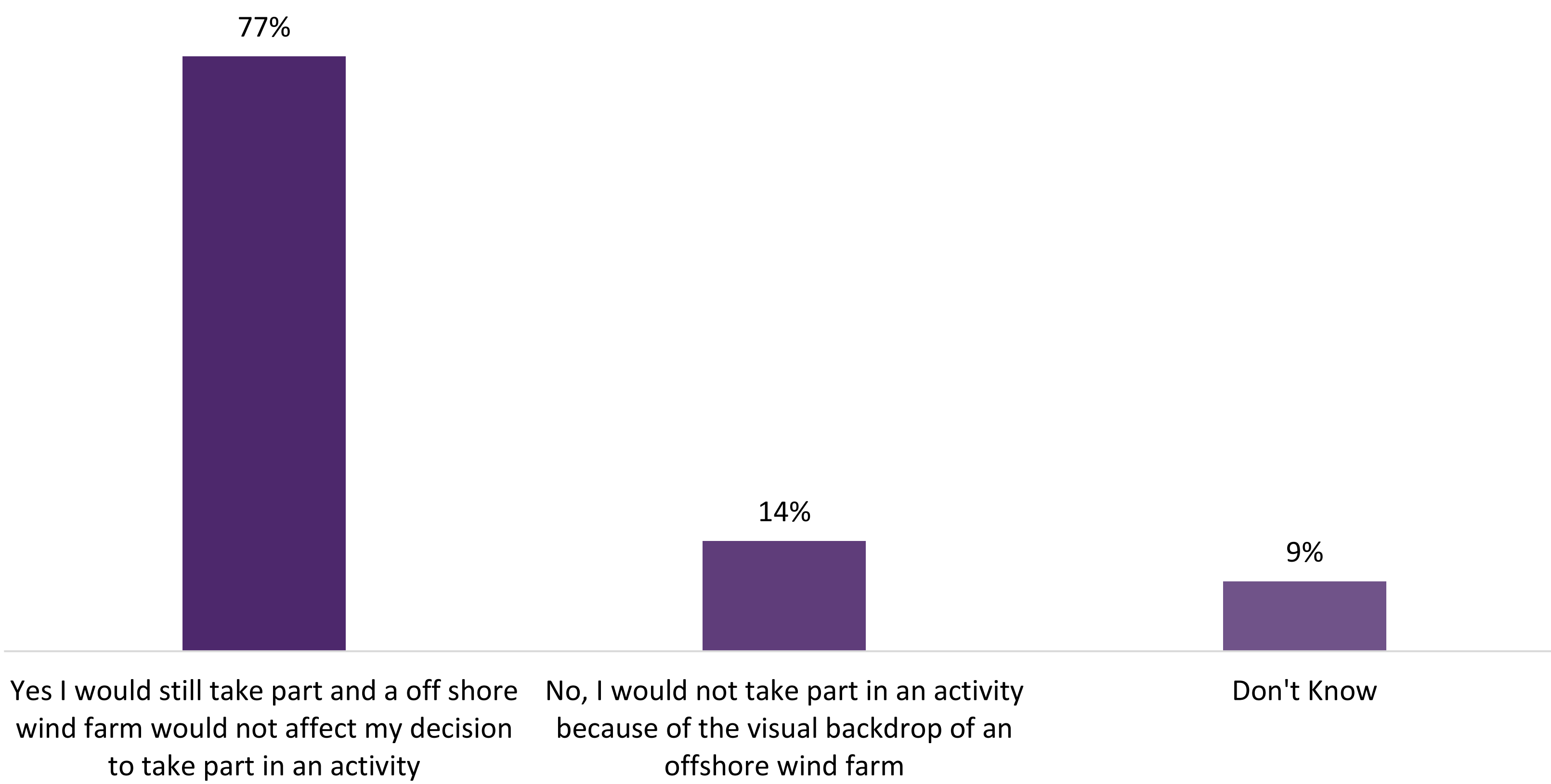
WOULD THE PRESENCE OF AN OFW IN A COASTAL AREA HAVE ANY IMPACT ON VISITOR'S DECISIONS TO VISIT THAT DESTINATION



VISITORS VIEWS ON THE POTENTIAL IMPACT OF OFW'S ON LOCAL BUSINESSES (E.G. RESTAURANTS, HOTELS, SHOPS ETC.) IN CONNEMARA



WOULD VISITORS TAKE PART IN A COASTAL TOURISM ACTIVITY THAT WOULD HAVE VIEWS OF AN OWF IN THE BACKGROUND (E.G. KAYAKING, BOAT TOUR, SAILING TRIP, FISHING TRIP ETC.)



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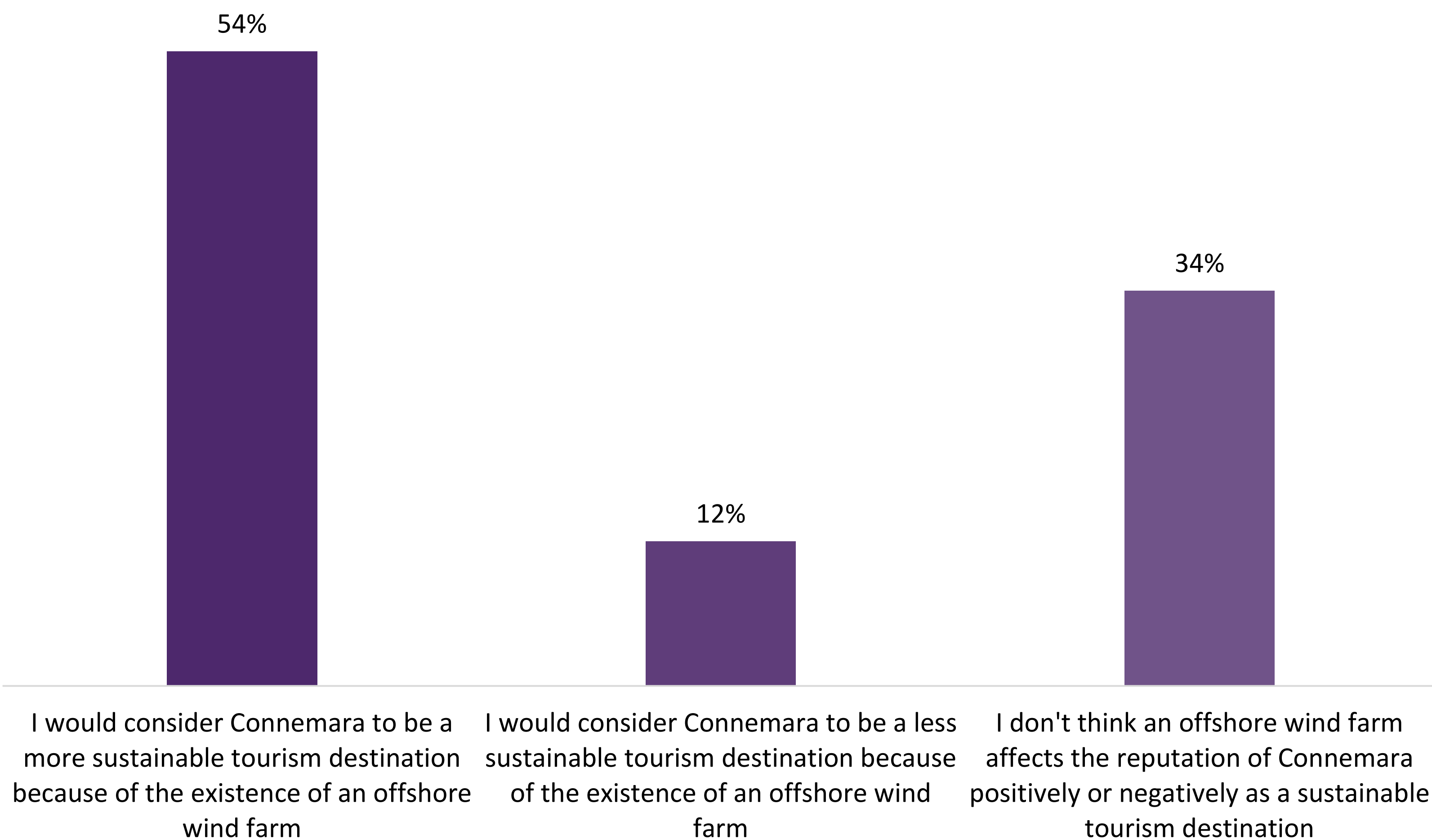
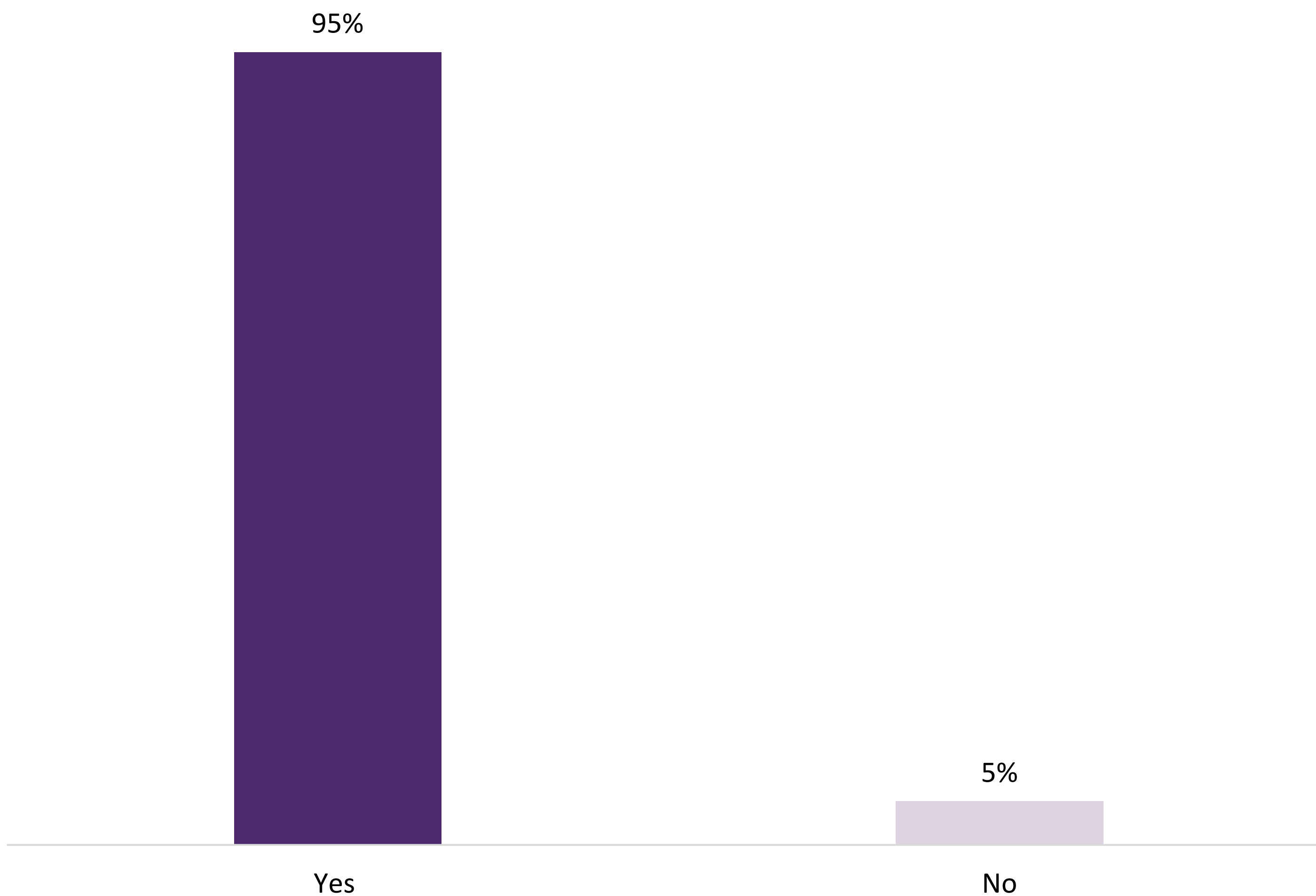
ENVIRONMENTAL IMPACT OF OFFSHORE WIND FARMS

VISITORS VIEWS ON THE SUSTAINABILITY OF A DESTINATION THAT HAS AN OFFSHORE WIND FARM

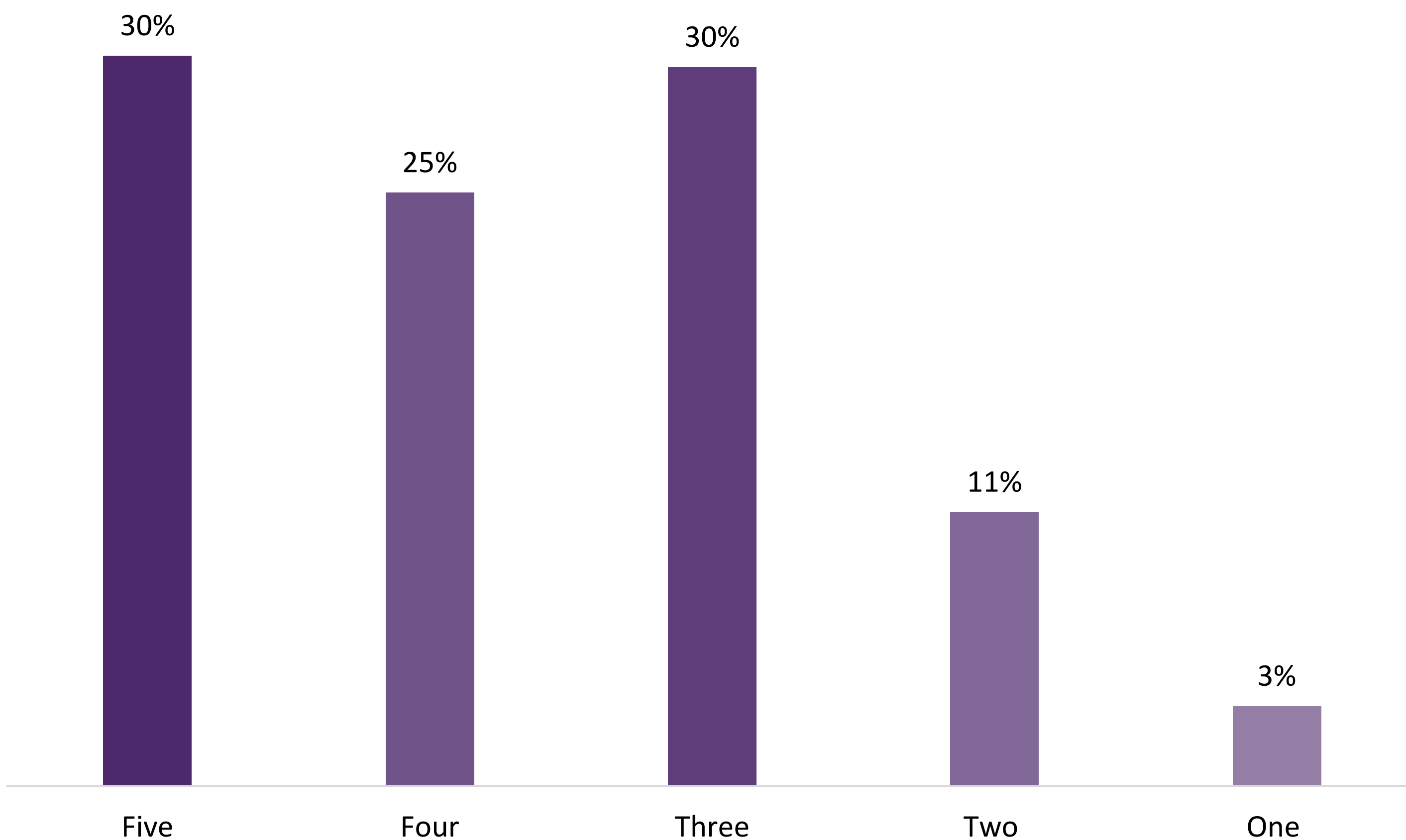


ARE VISITORS AWARE THAT OFFSHORE WIND FARMS ARE A RENEWABLE SOURCE OF ENERGY

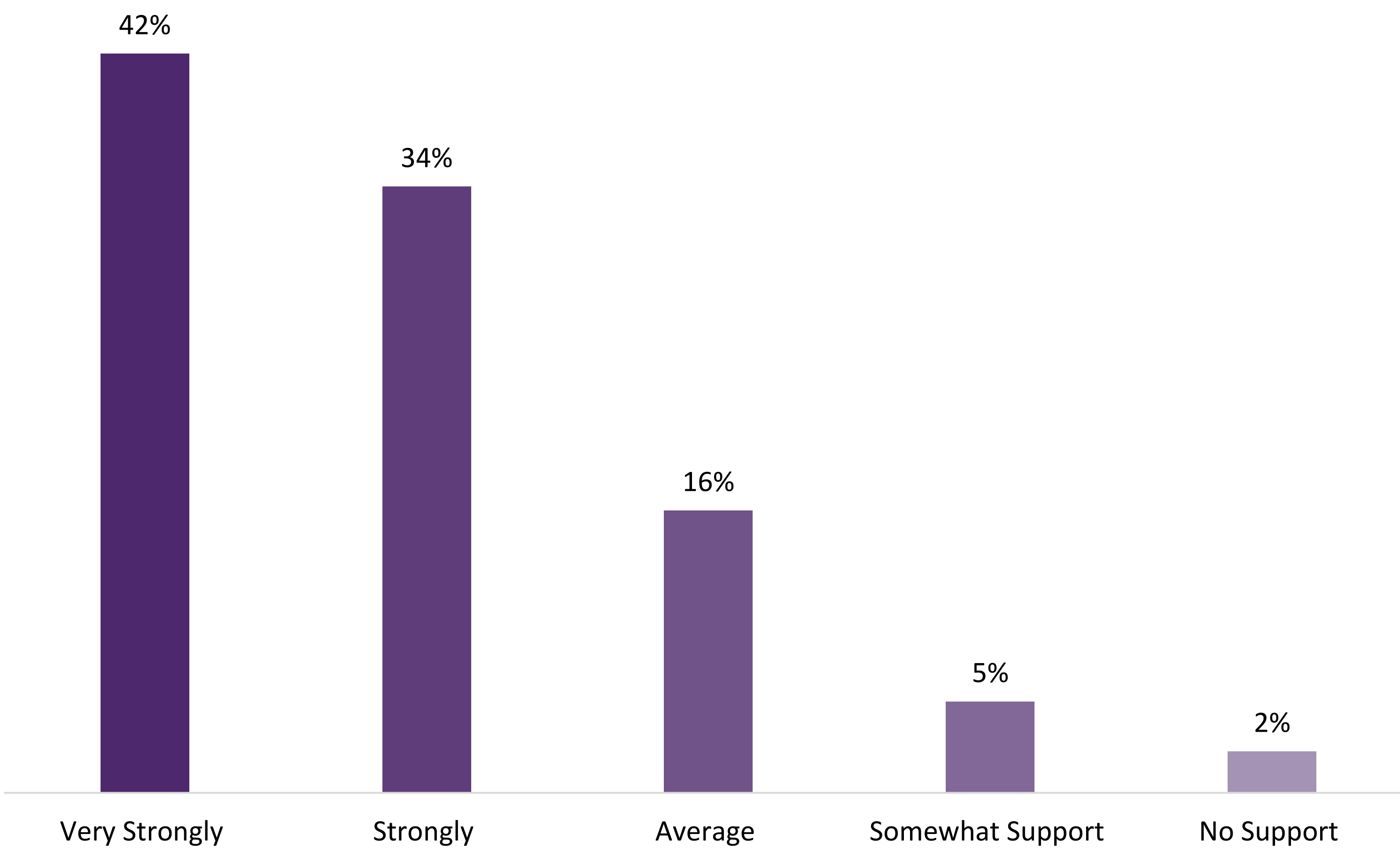


HOW VISITORS RATE THEIR INTEREST IN SUSTAINABILITY / CLIMATE ACTION ISSUES

(ON A SCALE OF 1-5, WHERE 1 IS VERY LITTLE INTEREST AND 5 IS VERY INTERESTED)



DO VISITORS SUPPORT A TRANSITION TO RENEWABLE ENERGY



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APPENDIX THREE

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