



Stop Lime Down Business Survey

STOP LIME DOWN
BUSINESS SURVEY

September 2026





Stop Lime Down Business Survey

1. Introduction

1.1.1. Within its response to Wiltshire Council's Local Impact Report, the Applicant concluded that the construction (and decommissioning) phase are likely to bring substantial (albeit not long-term) employment and economic uplift to the local area, including through indirect and induced effects" [REP2-038]. Stop Lime Down (SLD) does not accept that conclusion.

1.1.2. Wiltshire Council observes that the Lime Down Scheme is "*unlikely to help existing businesses meet their aspirations, or provide the right environment for business start-ups, instead disrupting businesses and inconveniencing their customers during the construction and decommissioning phases. This project would reduce visitor numbers to the local area potentially causing job losses in tourism, recreation and the retail sector locally*" ([REP1-137], 24). Reflecting these misgivings, Wiltshire Council requested that more detailed research be undertaken into the possible socio-economic impact of the Lime Down project prior to a Development Consent Order (DCO) being granted. The Council's Local Impact Report requires that "*no part of the authorised development may commence until a comprehensive business survey recording both positive and negative impacts of the scheme has been agreed with Wiltshire Council.*" (ibid, 25)

1.1.3. The Applicant has rejected this request. In a technical note released in August 2026, it states that "*the Applicant considered requirement for a comprehensive business survey would be too onerous for a Scheme of this scale and level of effect to economic sectors*" ([REP5-111], para 4.4.6). In short, SLD is frustrated by this response. The Applicant cannot rely on the scale of the scheme to justify the absence of a survey of the likely impact on local businesses. The scale of the scheme is precisely the reason that an in-depth assessment of those effects is necessary.



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1.1.4. SLD considers that the impact on local communities and businesses has been under-estimated by the Applicant. SLD suggests that the Applicant's approach has been inadequate for two reasons:

- There appears to have been insufficient dialogue between the Applicant (Lime Down Solar Park) and micro, small and medium-sized businesses throughout the affected area.
- Conclusions reached by the Applicant on the socio-economic impact of the scheme appear to have been based on questionable assumptions about economic activity and job creation in the vicinity of the proposed scheme. They are not based on the detailed analysis of the individual companies likely to be affected by Lime Down which a project of this size requires.

1.1.5. This paper presents the results of a survey conducted by SLD between July and September 2026. The aim of the survey was to identify a sample of local businesses within the vicinity of Stop Lime Down and consider the effects they anticipated the Scheme would have on their business.

1.1.6. SLD has sought to undertake the survey which the Applicant has refused to perform, notwithstanding the smaller resources it has available to it to commission a survey. The survey was led by an SLD steering committee member, supported by three volunteers from outside the SLD committee.

1.1.7. SLD acknowledges the inevitable shortcomings and limitations of its survey of businesses in the area affected by the Lime Down project. It was undertaken within a compressed timescale by volunteers and at the height of the summer holidays when many business owners were unavailable. It was inevitably based on an incomplete and imperfect list of local businesses. Additionally (and self-evidently), businesses will be more inclined to provide a response where they have strong (generally negative) views towards the Lime Down project, than businesses which are neutral or moderately positive about the Scheme. Nevertheless, SLD believes that the survey is a reliable barometer for the ExA in respect of local companies' expectations of how they may be affected by the



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project. Indeed, given the absence of this type of review by the Applicant, it is the best evidence available to the ExA of this kind.

1.1.8. SLD initially intended to submit this survey at Deadline 7 so that a proper period for responses was available to respondents (between July and September 2026). However, in light of the ISH listed on 22 September 2026 on “*environmental matters, including, but not necessarily limited to socio-economics, and ecology, and biodiversity*” SLD has sought to provide the results of the survey at an earlier stage, so that it is available to the parties and the ExA before the hearing. SLD apologises that this is provided between deadlines, and would respectfully request that this submission be accepted by the ExA so that it can be seen by the Applicant and Interested Parties and available for consideration at the ISH listed on 22 September 2026.



2. Survey Methodology

2.1. The Survey

2.1.1. Earlier in the summer a survey was devised by members of the SLD team. The survey began with the following questions in respect of the recipient's knowledge of the scheme:

- Are you aware of the proposal by Lime Down Solar Park Limited ("the applicant") for the construction of the 500MW Lime Down Solar Project? (Answers: Yes, No, Aware of Lime Down but was not aware of the scale of the project)
- Are you satisfied that you have received sufficient information about the proposed project from Lime Down Solar Park Limited, before today? (Answers: Yes, No, Don't Know)
- Are you satisfied that you have received sufficient information about the proposed project from Stop Lime Down, before today? (Answers: Yes, No, Don't Know)
- Are you satisfied that you have received sufficient information about the proposed project from the local and national media, before today? (Answers: Yes, No, Don't Know)
- Are you satisfied that you have received sufficient information about the proposed project from your local county, town or parish council, before today? (Answers: Yes, No, Don't Know)

2.1.2. Recipients were then asked to provide some basic background information on their organisation (business/company/charity), including organisation name, organisation sector, approximate annual turnover, number of full time and part-time employees.

2.1.3. Recipients were provided with statements and a series of options to tick in respect of how they anticipated their organisation would be affected, as follows:



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Possible Effect of Lime Down on Your Organisation

*

Which of the following statements most accurately describes the likely effect of the proposed Lime Down project on your organisation, if it consented?

(Tick as applicable)

- ☐ Lime Down is likely to have a positive effect on my organisation
- ☐ Lime Down is likely to have no effect on my organisation
- ☐ Lime Down is likely to have a negative effect on my organisation
- ☐ Lime Down is likely to have a severe effect on my organisation, (i.e. a risk of closure)
- ☐ I do not know how Lime Down will effect my organisation

If you have indicated that you expect Lime Down to have a negative or severe effect on your organisation, please indicate if any of the following will be the main drivers of this (tick all that apply)

- ☐ Reduced local community numbers
- ☐ Reduced local visitor numbers to the area
- ☐ Reduced international visitor numbers to the area
- ☐ Increased traffic volumes/congestion
- ☐ Increased noise
- ☐ Declining property valuations
- ☐ Reduced consumer confidence
- ☐ Relocation of customers away from the area
- ☐ Other (please specify at the end)
- ☐ None of the above

2.1.4. The following questions were then asked :

- Please provide some further information on the likely effect (positive or negative) of Lime Down on your organisation, if consented.



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- Would you expect Lime Down, if consented, to have a material effect on your annual turnover? If so, can you indicate whether you'd expect a likely annual gain or loss? (Answers: Likely annual gain, Likely annual loss, No expected impact).
- Please provide an approximate estimate of the likely annual gain/loss?
- Would you expect Lime Down to have a material effect on the number of people you employ? Would you expect the numbers to stay the same, increase or decrease?
- If increase or decrease in number of employees, please estimate by how many
- Would you expect Lime Down to have a material effect on your investment plans? If so, can you provide details?
- If you have any further comments on the likely socio-economic effect of the Lime Down Solar Project in relation to your organisation, please provide further details below

2.1.5. Finally, recipients were asked to indicate their preference for how their information could be shared.

Consent

*

Please indicate your preference on how SLD can use your responses.

- ☐ I am happy for Stop Lime Down to quote my responses as evidence during the Planning Inspectorate Examination. I understand that evidence submitted to the Planning Inspectorate may become publicly available.
- ☐ You may quote my responses and identify my business.
- ☐ You may quote my responses, but must anonymise my business and any identifying information where possible.
- ☐ Use my responses for research purposes only and do not submit them as evidence.

2.2. The Recipients



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2.2.1. In July 2026, SLD compiled a database of more than 200 companies from sectors believed to be representative of the local economy. These were drawn principally from the tourism, hospitality, retailing, agriculture and sports and leisure sectors. The database for the SLD survey was compiled from several sources. These included personal contacts, a list provided by Malmesbury Town Hall, public websites and AI searches

2.2.2. SLD acknowledges that the following were not included in the database, which will skew results to some extent:

- Landowner-farmers who are direct beneficiaries of the Lime Down scheme.
The Applicant observes that *“the operational phase of the Scheme is anticipated to generate a modest quantum of skilled employment and economic stability for owner-occupier farm business who have land under option within the Scheme.”* SLD SLD does not believe that benefits derived from the scheme by a small group of landowners should be taken as an indication of a broader economic uplift across the affected area.
- Construction companies. The Applicant has estimated that 145 jobs could be created for local residents in the construction sector. In the absence of any detail collaborating this comment, it is unclear where these employment opportunities will be sourced. To the best of SLD’s knowledge, there are no construction companies based close to the vicinity of the proposed solar scheme. According to the Office for National Statistics (ONS), there are no more than 40 construction companies with more than 10 employees in the entire South Cotswolds constituency, which has a total population of about 96,500.
- Companies generally not representative of the local economy. This survey has focussed largely on impacts to the tourism, hospitality, retailing, agriculture and sports and leisure sectors. This survey has excluded results from outlier sectors of the local economy, even where those enterprises submitted relevant representations expressing disapproval of the Lime Down proposal. For example, results have been excluded from a Malmesbury-



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based financial services group and a computer software consultant located in Sherston.

2.2.3. Beginning on July 31, 2026, businesses within the database were approached by e-mail. E-mails with a link to a questionnaire were addressed to named contacts where these were known. In the absence of named individuals, e-mails were sent to generic website addresses such as those beginning info@. E-mails were followed up with phone calls and text messages from the project leader and two student helpers. Later, a volunteer from the SLD supporters' group made personal visits to several businesses in Malmesbury. A handful of these submitted responses by manually completing the SLD questionnaire. These were signed by the interviewees in order to verify their participation.

2.2.4. In the interests of transparency, six responses were provided from members of the SLD committee who own local businesses.

2.2.5. SLD noted that some organisations were reluctant to participate. For example, there were local businesses which indicated that they felt compromised by their close relationships with some of the landowners who are beneficiaries of the Lime Down proposal. In a telephone call with the project leader, one business owner said he/she was against the Lime Down project but was uneasy about responding because their premises were located on the estate of the Duke of Beaufort, some of whose land has been made available to Lime Down Solar Park.

2.2.6. Additionally, the size and corporate structure of some of the largest local employees militated against their participation in the survey. E-mails to individuals at the largest company in the affected area (Dyson) were unanswered. Some of the leading hotels in North Wiltshire and South Gloucestershire, meanwhile, are owned by large chains based in London and elsewhere. This made the managers of some local hotels reluctant to express any views on the Lime Down project without the authority of their head offices. SLD's enquiry to the London



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headquarters of one such chain which owns highly rated hotels in Tetbury and Westonbirt was unproductive.



3. Survey Findings

3.1.1. As of 16:00 on September 3, the survey had drawn responses from 96 companies and other commercial organisations located within or close to the area affected by Lime Down. 67 of these respondents provided details of their annual turnover, which amounted to just over £60 million. Between them, the companies sharing basic data on their workforce indicated that they employed 1032 people on a full and/or part-time basis.

3.1.2. **Over 81% of respondents believe the effect of Lime Down on their organisation will be negative or severe. 76% anticipate a decline in their annual turnover if the project proceeds. Over 38% expect the size of their employee base to shrink if the scheme is consented. Just under 40% indicate that the impact on their investment plans will be negative if Lime Down goes ahead.**

3.1.3. As such, SLD believes that the results of the survey corroborate Wiltshire Council's concerns about the possible socio-economic consequences of the Lime Down project if it is granted a DCO.

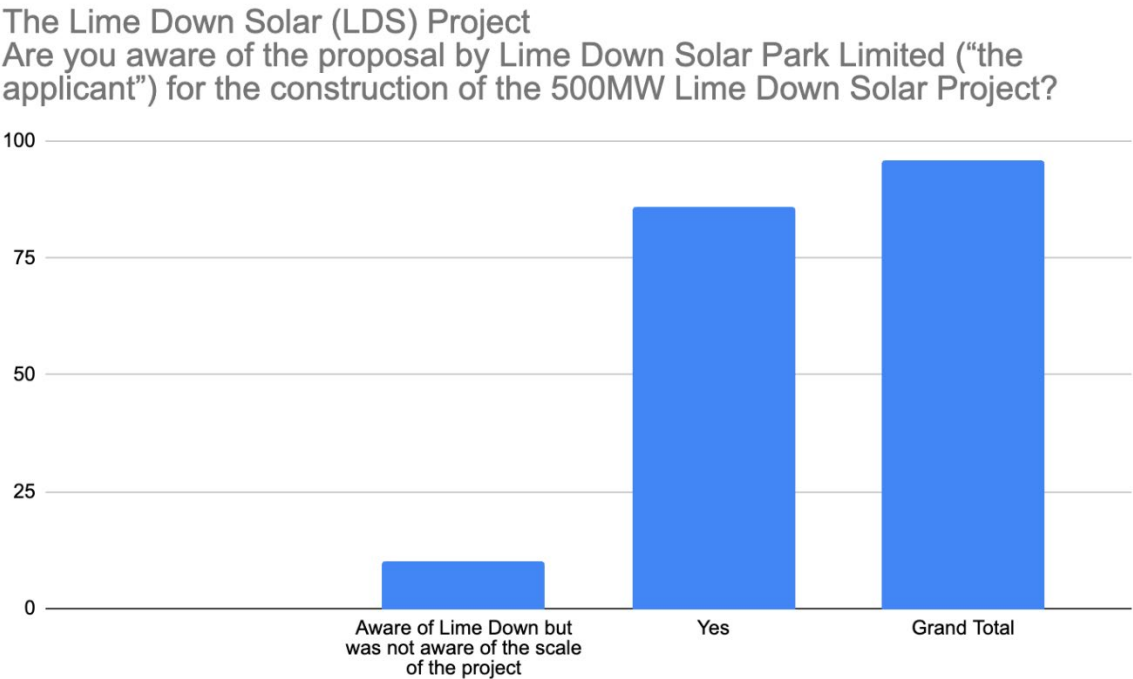
3.2. Questions regarding knowledge of the Scheme

Q1: "Are you aware of the proposal by Lime Down Solar Park Limited ("the applicant") for the construction of the 500MW Lime Down Solar Project?"

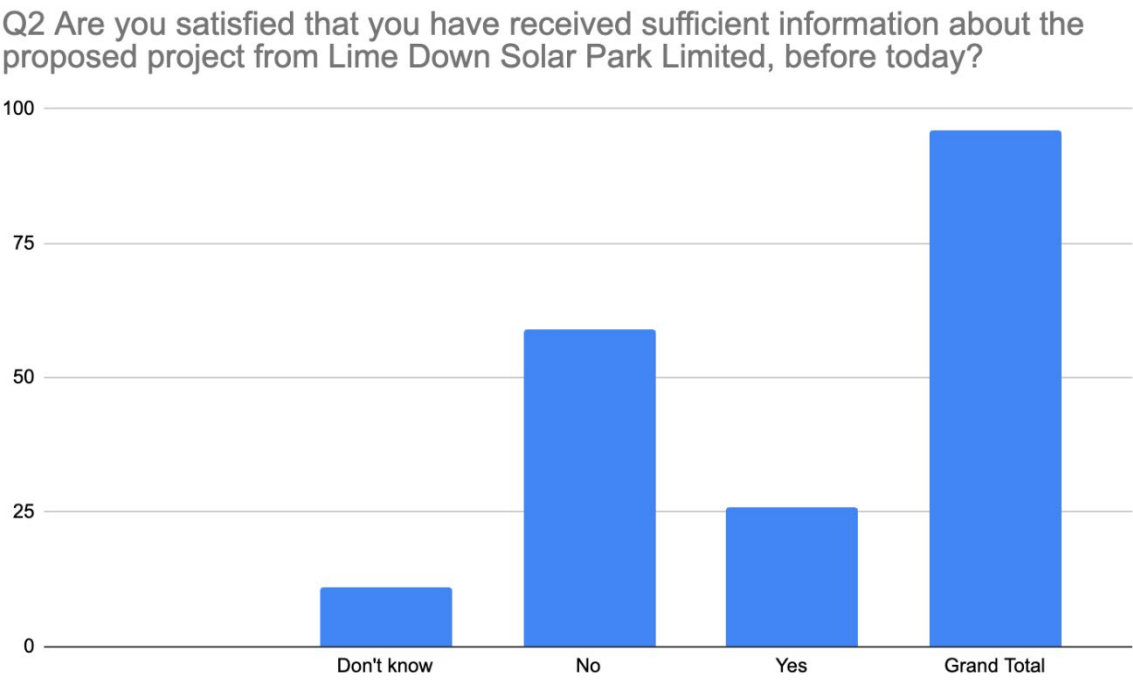
3.2.1. The overwhelming majority of businesses (89.6%) in the affected area reported that they are aware of the Lime Down solar project proposal. The remaining 10.4% indicated that while they were familiar with the proposal, they were unaware of its size.



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Q2: “Are you satisfied that you have received sufficient information about the proposed project from Lime Down Solar Park Limited, before today?”

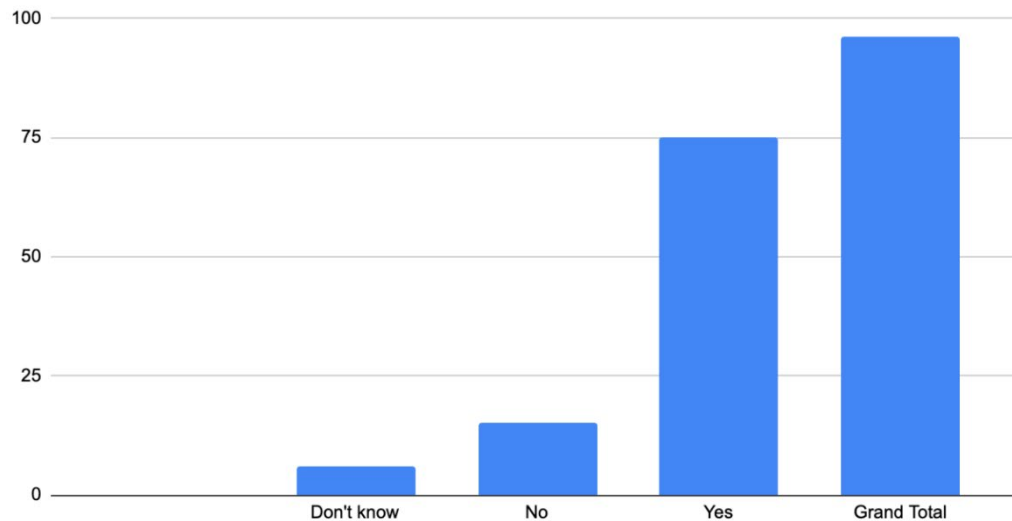




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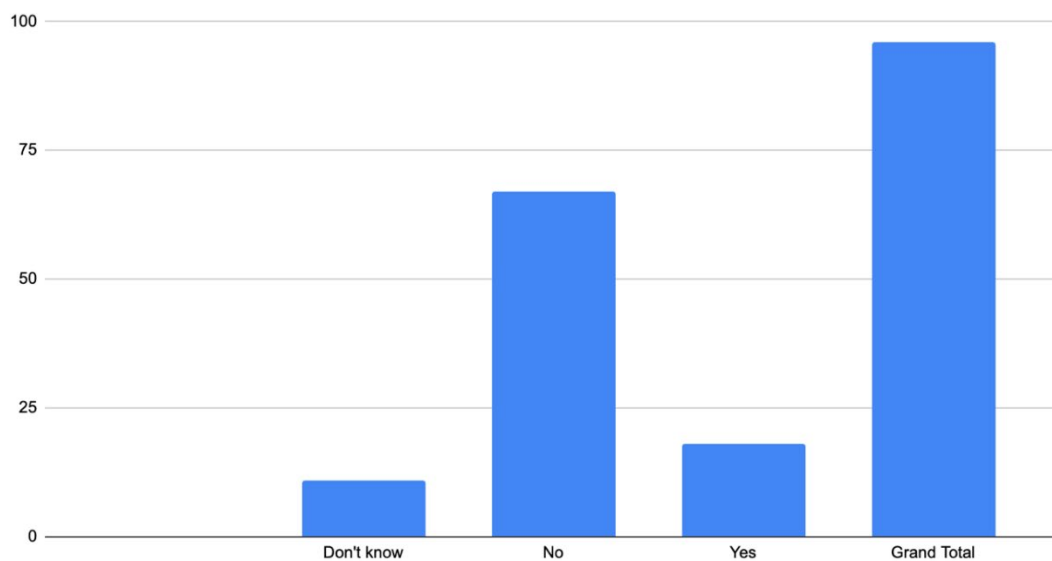
Q3: “Are you satisfied that you have received sufficient information about the proposed project from SLD, before today?”

Q3 Are you satisfied that you have received sufficient information about the proposed project from Stop Lime Down, before today?



Q4: “Are you satisfied that you have received sufficient information about the proposed project from the local and national media, before today?”

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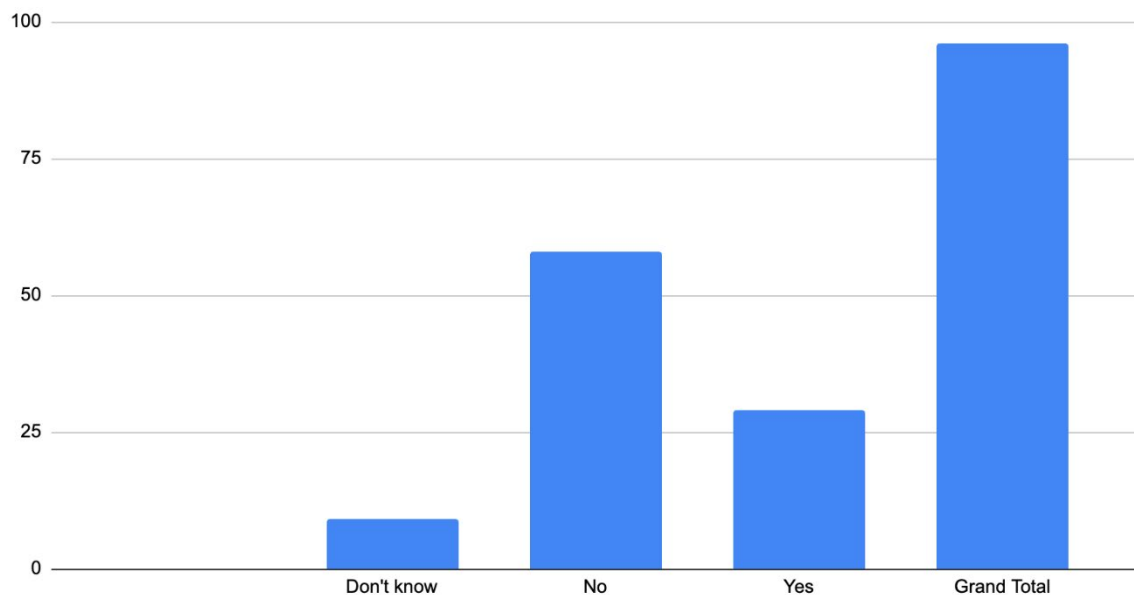




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Q5: “Are you satisfied that you have received sufficient information about the proposed project from your local county, town or parish council, before today?”

Q5 Are you satisfied that you have received sufficient information about the proposed project from your local county, town or parish council, before today?



3.2.2. This section of the survey's findings suggests that local businesses' principal source of information about the proposed Lime Down project has been SLD. 78.1% of respondents indicated that they are satisfied that they had received sufficient information on the proposal from SLD, with 15.6% reporting that they had not received enough information from the group and the remaining 6.25% unsure. Anecdotally, the number of 'don't knows' may reflect confusion among some businesses as to whether the information they have received has come from SLD or Lime Down Solar Park Ltd.

3.2.3. The majority of local businesses report that the information they have received about the proposed project from the Applicant has not been adequate. 61.4% of respondents say that they have not received sufficient information about the project from the Applicant. 27% reported that the information supplied by the Applicant has been sufficient.



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3.2.4. Respondents generally report that other sources of information on the Lime Down proposal has been insufficient. 18.75% indicated that they had been sufficiently informed by the local and national media; just over 30% were satisfied with the volume of information they have received from their local county, town or parish council.

3.3. Questions regarding businesses

Q6: Organisation name.

3.3.1. Of the 96 respondents, 91 provided the name of their organisation. Two asked to remain anonymous. Three described their sector ("local tourist business"; "holiday cottage owner"; "Air BnB") without identifying themselves.

Q7: Organisation sector.

3.3.2. The 96 respondents represented the following sectors:

Sector	Count
Agriculture/farms	7
Animal care/vets	5
Charities	3
Education	2
Equine/studs	13
Food manufacturing	1
Healthcare	6
Hospitality – accommodation, hotels, lets	10
Hospitality – cafes	4
Hospitality – catering/other	1
Hospitality – events	3
Hospitality – pubs (many with restaurants)	11
Landscape design & horticulture	2
Property	4
Public sector	1
Retail	18
Sports/social/entertainment/leisure	4
Transportation	1
Total	96



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Q8: Approximate annual turnover.

3.3.3. With the benefit of hindsight, the survey ought to have reassured participants that their reported annual turnover numbers would only be used for inclusion in a consolidated figure. Presumably believing it to be sensitive information, 29 respondents (30%) chose to withhold data on their turnover. Across the 70% of respondents sharing this information, consolidated turnover amounted to **£60.53 million**.

Q9: Number of employees

3.3.4. Survey participants were asked to subdivide the number of their employees into full and part-time workers. As these numbers were supplied in several different formats (“10 of us plus contract caterers..”; “my wife and I own and run the business”; “approx. 50 via business partners” etc) the findings of this survey make no distinction between full and part-time employees which total **1032** on a consolidated basis.

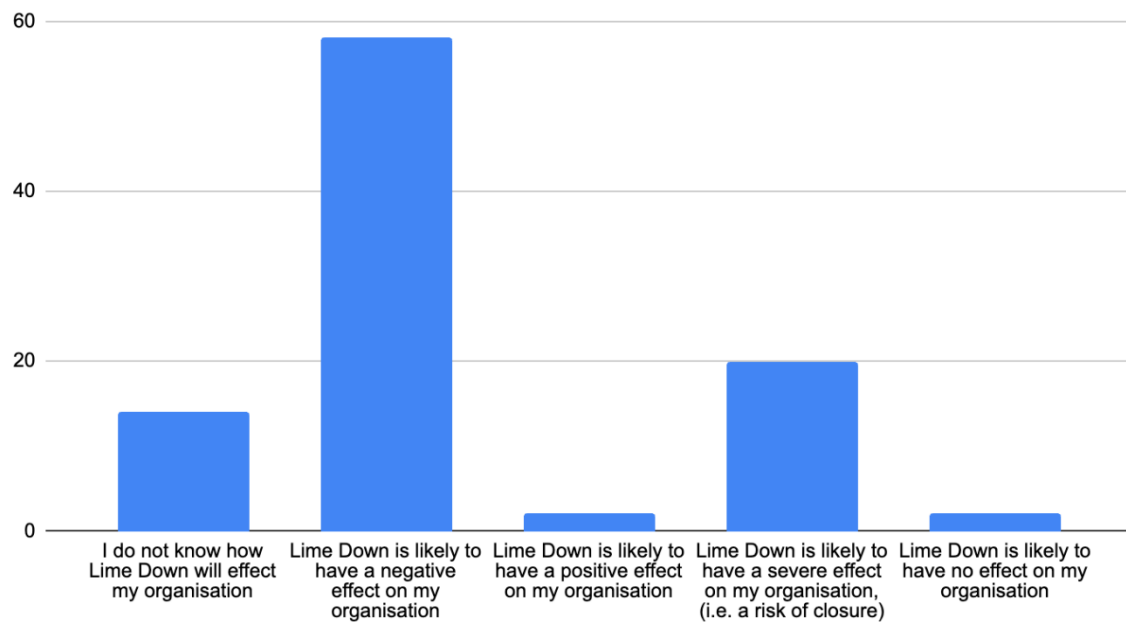
3.3.5. Note that Dyson, which is comfortably the largest employer in the affected area, did not participate in the SLD survey.

3.4. Effects of the Scheme

Q10: Effect of Lime Down Project on Organisation

3.4.1. Respondents were asked to forecast the possible effect of the Lime Down project on their organisation.

Possible Effect of Lime Down on Organisations



3.4.2. The majority of respondents (58, or 60.4%) indicated they expect Lime Down to have a **negative** effect on their business. A further 20 (20.8%) reported that they expect the project to have a **severe** impact on their business (defined as a risk of closure)

3.4.3. Six respondents ticked both 'negative' and 'severe' in their responses to this question. For statistical purposes, these responses have been interpreted to signify that the effect will be 'severe.' Fourteen respondents (14.6%) reported that they do not know how Lime Down would affect them.

3.4.4. Two respondents expected the project to have no effect on their organisation. Two respondents indicate that they believe Lime Down will have a **positive** effect on their organisation.



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Q11: Nature of Negative or Severe Effect

3.4.6. Respondents indicating that Lime Down would have a negative or severe effect on their business were asked to identify the main drivers of this impact, ticking all that applied. This identified the main drivers of a negative or severe impact as:

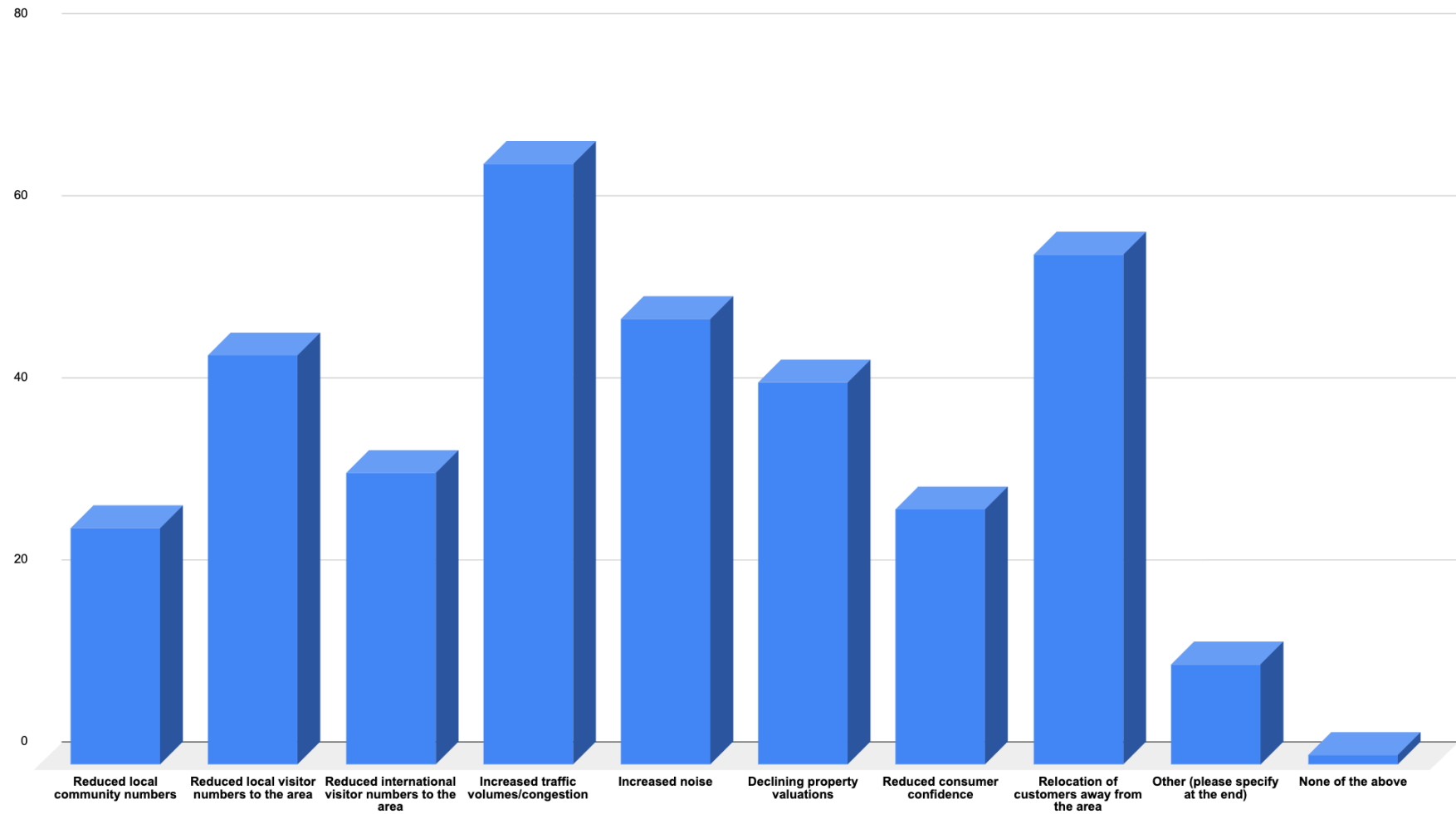
- Increased traffic volumes and congestion (identified by 66 respondents, or 68.75% of respondents);
- Relocation of customers away from the area (56, or 58.3%);
- Increased noise (49, or 51%);
- Reduced local visitor numbers to the area (45, or 46.9%);
- Declining property valuations (42, or 43.75%)
- Reduced international visitor numbers to the area (32, or 33.3%)
- Reduced consumer confidence (28, or 29.2%)
- Reduced local community numbers (26, or 27%)

3.4.7. Note that these figures should be interpreted with care because businesses in some sectors will inevitably be more impacted by specific effects than others. Increased noise, for example, is more relevant for equine businesses than others; decreasing visitor numbers is more of an issue for the hospitality sector than for equine businesses, etc.



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Main Drivers of the Negative Effect on Local Businesses & Organisations





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Q12: Further information on likely effects

3.4.7.1. Respondents were invited to provide further information on the likely effect on their organisation of Lime Down, if consented. SLD have set out below a selection of those comments provided (edited for spelling errors). Comments have only been included where SLD has obtained their consent for being shared.

- “Loss of facility; Closure on safety grounds; Obstruction to facility access; Loss of peaceful enjoyment; Loss of members; Removal from league” (Grittleton Tennis Club)
- “It will force closure of a huge number of horse breeding and rearing operations that have been a cornerstone of the area for so many years across so many equine industries (e.g. Badminton, Escort, Beaufort Polo, etc). These are specialist careers and will present huge problems to the local jobs market going forward.” (Ladyswood Stud)
- “People stay here and spend significant money in the community due to the beautiful and untouched landscape and cultural heritage. A frequent reason for their choice of this area is for cycling and walking holidays. They won't want to pay for a holiday to walk through a building site or an area desecrated by signs of mass development and solar panels.” (anonymous holiday cottage owner)
- “Broadly The Angel has two groups of customers: (a) Residents of Sherston and surrounding villages / areas who use it as a convenient and pleasant meeting place. As a result, it has become a major hub for the village since re-opening in 2021. (b) Walkers and cyclists drawn to the locality by the beauty of the area. Walkers are of particular importance as they regularly take rooms overnight (through Cotswold Walks etc.). This second group of customers is unlikely to be drawn to walk or cycle through acres and acres of solar panels, let alone the heavy plant that will be present for a long time before project completion. Should the Lime Down project proceed, the expectation is that our trade will reduce drastically, to the extent that The



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Angel will become completely unviable as a business and, potentially, forced to close.” (The Angel, Sherston, licensed café with accommodation)

- “It will fundamentally destroy the image I have been developing over many years of a countryside inspired and located florist and flower growing business.” (DibFlowers, event florist).
- “People are more likely to sell and move away from the area, will be less likely to invest in their gardens, and property values in the area will fall meaning fewer affluent people locally to be using my company’s services.” [REDACTED] – landscape design).
- “Extreme concern over extra traffic on small roads which are already congested. Concerns for safety for our local school contracts which we operate in the local villages of Hullavington, Corsham, Luckington, Sherston and Rodbourne. All of these villages are going to be affected massively on a daily basis by the Lime Down project.” (Andybus & Coach Ltd).
- “Overall, while the project offers clear renewable energy benefits, it raises significant questions about whether these outweigh the long-term environmental, agricultural, and community impacts in North Wiltshire.” (anonymous, health care business owner).
- “We are a business which operates mainly outside, so the planned works will create a completely different environment. During the construction phase; we will no longer be a peaceful place to buy plants because of the general noise and increased traffic levels. In the longer term, we anticipate that many of our long-standing customers will either move away from the area or shop elsewhere if we become a less pleasant place to visit, thus negatively affecting our customer base.” (Foxley Road Nurseries).
- “The extra traffic will make getting to customers more difficult. There is also the possibility of customers moving away due to the blot on the landscape that will be created.” (Ratcliffe & Sons, retail & workshop).
- “Without exaggeration Lime Down Solar would severely change the local area and the residents’ peaceful enjoyment of the countryside. By nature,



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Equestrianism is an outdoor pursuit and the likely change to the landscape will be hugely detrimental.” (New Priory Stud)

- “As a B&B and holiday cottage owner near Castle Combe - one of the prettiest villages in England this proposal will have a devastating effect on tourism. The visitors who travel to the North Cotswolds come here as it is an Area of Outstanding Natural Beauty with the absolute star at the centre being Castle Combe. If this blight on the landscape LIME DOWN SOLAR FARM is permitted tourist will not return. Why would they want to be in queues of HGV transporting materials and panels for hours on end when their dream of a green and pleasant land will be destroyed? Wiltshire Council gains huge income from tourism and this will destroy that and the image of Castle Combe for good. I have been in the tourism industry for over 40 years, and this is the biggest threat to my livelihood that I have ever encountered. I will have to lay off staff as guests will no longer want to stay with all the construction work taking place in the surrounding area.” (Fosse Farmhouse B&B)
- “Quite simply, many buyers no longer want to live in the vicinity, and the area previously was extremely sought after with few negatives.” (James Pyle & Co, Property Sales)
- “Westonbirt The National Arboretum is Europe's most complete tree collection and one of the finest arboretums in the world. Developed over nearly 200 years the arboretum holds over 1800 different species of tree, many that are threatened with extinction in the wild. The heritage tree collection is suffering from the rapidly cumulating impacts of climate change with three 'drought' years in the last 5 and an unprecedented number of days over 30 degrees Celsius, and this July/August and unprecedented 34-day period without rain. There is an urgent requirement to reduce CO2 emissions and decarbonise our national electricity supply in order to arrest the growing level of greenhouse gases in the atmosphere and thus limit the future severity of climate change as soon as possible. Solar projects such as Lime Down on relatively mediocre farmland and with largely reversible impacts are potentially an important stepping stone towards a more sustainable and balanced net zero world. In addition to climate impacts on the tree collection



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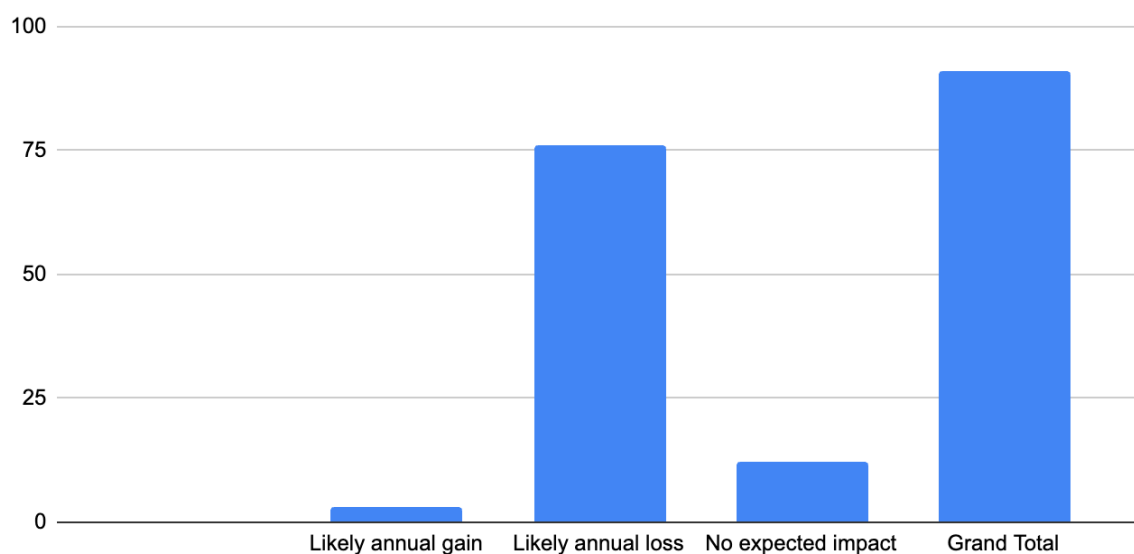
the lack of adequate electric capacity in the local grid system is holding back investment in our own net zero technologies e.g. air source heat pumps and induction cooking as we seek to move away from gas and oil. Lack of electric supply may even prevent future investment in new infrastructure designed to sustain and grow tourism revenue.” (Westonbirt Arboretum)

Q13: Material effect on turnover

3.4.7.2. Respondents were asked if they expect the Lime Down project to have a material effect on their annual turnover. If so, would they expect an annual gain or loss?

- A majority (76 respondents, or 79.2%) believe that their annual turnover would decline if Lime Down were consented.
- 12 respondents (12.5%) foresee no impact on their turnover if Lime Down is consented.
- Three respondents (3.125%) believe their annual turnover will rise if Lime Down goes ahead.

Q13 Would you expect Lime Down, if consented, to have a material effect on your annual turnover? If so, can you indicate whether you'd expect a likely annual gain or loss?



Q14: Estimate of gain or loss

3.4.7.3. Respondents were asked to provide an approximate estimate of the likely annual gain or loss in their turnover if the Lime Down project proceeds. Unsurprisingly, this was among the most difficult questions for respondents to answer. 23 respondents (24%) were able to provide estimates, expressed either as a percentage or an absolute value. Among those prepared to quantify the potential losses, The Angel Café in Sherston put the decrease at a 'minimum' of 30 to 40% of turnover. DibFlowers indicated turnover may be down by 50%. Of the retailers, Constantine Rex forecasts a decline of 3 to 5%, and French Grey Interiors anticipates a loss of 10 to 15%. In the property sector, James Pyle & Co expects an annual decline of between 5 and 10%. Toby Pickthall Equestrian Coaching is representative of the quantifiable effect on the equestrian sector, forecasting a 25% loss.

3.4.7.4. Among those expecting a positive effect from Lime Down, Westonbirt Arboretum believed that "cumulatively more grid supply could result in say 20% turnover increase (or avoid that level of loss)."

Q15: Effect on Employee Numbers

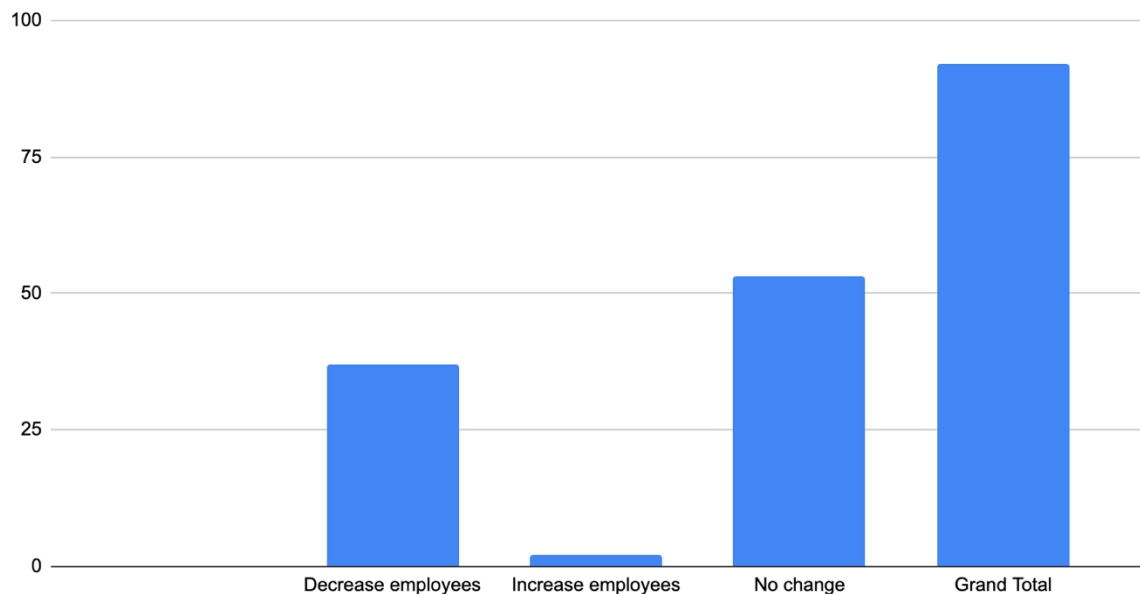
3.4.7.5. Respondents were asked to comment on the possible effect of the Lime Down project on their employee numbers.

- A small majority (53 respondents or 55.2%) expect the project to have no effect on their employee numbers if it proceeds.
- 37 organisations (38.5%) expect their employee numbers to fall if the Lime Down project proceeds.
- Two respondents (2%) anticipate that they will need to increase their employee numbers if the project is consented.



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Q15 Would you expect Lime Down to have a material effect on the number of people you employ?



Q16: Number of Employees Lost/Gained

3.4.7.6. Respondents were generally reluctant to provide a precise answer to this question, which asked them to quantify the number of employees they would expect to gain or lose if Lime Down proceeds.

3.4.7.7. 14 respondents (14.6%) were prepared to estimate a number. Among the most notable of these were Grittleton House, which reported a possible reduction in its staffing levels of “at least 50% maybe more”, while one equine business choosing to remain anonymous suggested that its entire workforce would be at risk.

Q17: Effect on investment

3.4.8. Businesses were asked whether they expect Lime Down to have a material effect on their investment plans, and if so, to provide further details. Just under half (46 respondents or 47.9%) responded to this question, with 38 (39.6%) saying it would have a negative effect on their investment plans, four (4.2%)



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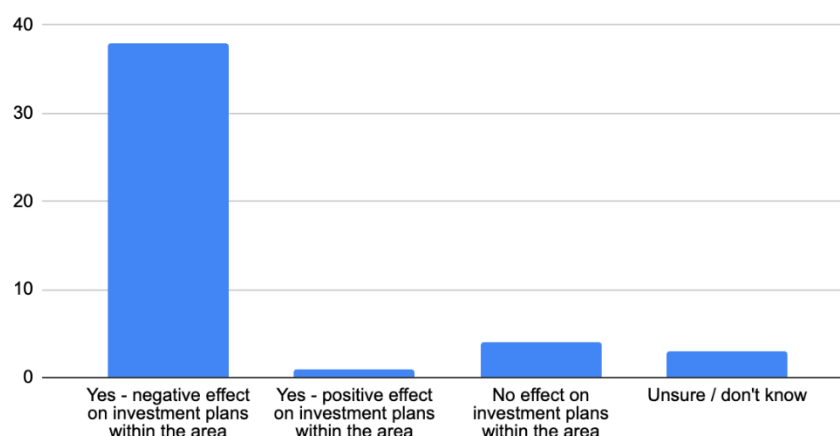
expecting the project to have no effect, and one anticipating an increase in its investment plans.

3.4.9. Note that at least one sole trader responding to this question interpreted it as an enquiry about their personal investment plans, reporting that it would lead them to reduce their pension contributions.

3.4.10. A selection of detailed comments from those anticipating a material impact on their investment plans are as hereunder:

- “Unlikely to make further investments” (Sassy & Boo; Luella Fashion)
- “Reduced profit means property maintenance of this historic building would have to be scaled back or postponed.” (The Angel Café)
- “I will not invest in any future development at my property as I can foresee that the tourism numbers will drop considerably and I may even be forced to close.” (Fosse Farmhouse B&B)
- “I would not continue to invest in the livery business as customers moved away” (equestrian company requesting anonymity)

Would you expect Lime Down to have a material effect on your investment plans?





4. Conclusion

4.1.1. This report has set out the results of the business survey conducted by SLD between July and September 2026. SLD had intended to present this survey at Deadline 7. However, in light of the ISH listed on 22 September 2026 on “*environmental matters, including, but not necessarily limited to socio-economics, and ecology, and biodiversity*” SLD has sought to provide the results of the survey at an earlier stage, so that it is available to the parties and the ExA before the hearing.

4.1.2. Generally, SLD considers that that the impact on local communities and businesses has been under-estimated by the Applicant. The survey observes that over 81% of respondents believe the effect of Lime Down on their organisation will be negative or severe. 76% anticipate a decline in their annual turnover if the project proceeds. Over 38% expect the size of their employee base to shrink if the scheme is consented. Just under 40% indicate that the impact on their investment plans will be negative if Lime Down goes ahead.

5. Appendix Note – Pubs

5.1.1. Since 2000, more than a quarter of British pubs have permanently shut their doors. In the first quarter of 2026, 161 pubs closed across England, Scotland and Wales, with the loss of around 2,400 jobs, according to the British Beer and Pub Association (BBPA) ([REDACTED]).

5.1.2. Especially in rural communities, this has meant much more than the loss of pints and pies. As recent research from Loughborough University observes, when a pub shuts its doors for the final time, it is rarely just a business that disappears. *“The loss often echoes through entire communities, affecting friendships, identities and local support networks in ways that statistics cannot capture,”* notes the Loughborough University report ([REDACTED]).

5.1.3. Pubs in the South Cotswolds area are already facing the challenges of inflationary pressures, an unfavourable tax regime and the cost-of-living crisis. Today, many now also feel threatened by the possible effect of the Lime Down solar project, according to SLD’s survey of businesses in the area.

5.1.4. In late July and throughout August, SLD contacted 18 pubs across the affected area by email, inviting them to share their views on the possible effects of the solar project on their business.

5.1.5. 11 pubs responded, each from a different town or village within the proposed Lime Down area. Only one of the 11 declined to provide a number for its annual turnover, which SLD estimates to be at least £1 million. As this pub is the joint largest employer among the 11 respondents to the SLD survey and a very popular venue among locals and tourists alike, it is probable that this is a highly conservative estimate.



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5.1.6. Factoring in this low estimate, the 11 pubs participating in the SLD survey have a consolidated annual turnover of at least £10.44 million and a total of 265 employees (full and part time). This means that aside from being social anchors for the communities they serve, they make a considerable contribution to economic activity and job creation across the Lime Down area.

5.1.7. Of the 11 participating pubs, one indicated that if consented the Lime Down project would have a **severe** impact on its business (i.e. a risk of closure). Seven said the effect would be **negative**, with one noting that *“we have tourists visiting the village and area due to its natural beauty and being a Cotswold village. Having 1850 solar panels in the surrounding villages will possibly put them off visiting our part of the Cotswolds, reducing room bookings and overall revenue.”*

5.1.8. Three respondents reported that they **did not know** how the proposed solar farm would affect their business. One of these advised that *“as a business we don’t fully get the possible effect on the local economy”*. Another of the ‘unsures’ observed that *“if there is a reduction in the number of visitors to the village, then obviously it will have a negative impact on the pub itself. If the disruption caused by the development causes an issue for people getting in or out of the village, that could have a fairly substantial effect on the viability for people coming for dinner.”*

5.1.9. Eight of the 11 pubs responding to the SLD survey expect a decline in their annual turnover if the project is consented. Of the three respondents quantifying this expected reduction, one forecast a decline in turnover of £200,000 (on a current turnover of £1.2 million). Another put the likely reduction in turnover at £250,000 (on a current turnover of £1 million). A third estimated a decline of £30,000 (on a turnover of £300,000).

5.1.10. Six of the 11 pubs replying to the survey indicated that they expect the number of their employees to decline if the Lime Down project proceeds.



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5.1.11. Four of the 11 respondents expect Lime Down to have a “material” impact on their investment plans if the project is consented. One reported that “no further investment” would be considered if the project goes ahead; another said “all planned investment would be put on hold” if Lime Down is consented. A third advised *“No, because our investment has been completed already and we don’t have any immediate plans for anymore.”*

5.1.12. The conclusion to be drawn from these responses is that the solar project is expected to have a negative effect on the pub sector across the affected area.