

THE LONDON RESORT

The London Resort Development Consent Order

BC080001

Environmental Statement Volume 2: Appendices

Appendix 7.3 – Detailed baseline

Document reference: 6.2.7.3

Revision: 00

December 2020

Planning Act 2008

The Infrastructure Planning (Applications: Prescribed Forms and Procedure) Regulations 2009

Regulation 5(2)(a)

The Infrastructure Planning (Environmental Impact Assessment) Regulations 2017

Regulation 12(1)

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Appendix 7.3 ◆ Detailed Baseline

INTRODUCTION

- 7.3.1 Chapter 7: *Land use and socio-economics* (document reference 6.1.7) reports the existing socio-economic and employment conditions relevant to the study areas of the London Resort, and assesses the impact of the London Resort upon those baseline conditions. This appendix provides more detail on the baseline conditions and underpins the assessment in the chapter.
- 7.3.2 This appendix follows the same structure as the baseline presented in the chapter, where data relevant to each effect is listed in order of the effects assessed. Chapter 7: *Land use and socio-economics* (document reference 6.1.7) concludes on the sensitivity of each receptor relevant to each effect, that sensitivity is not repeated in this appendix.
- 7.3.3 The study areas are consistent with that presented in the main chapter, as shown in Table 7.3.1. The listed study area abbreviations are used throughout the appendix.

Table 7.3.1 Study areas considered in the London Resort

Geographical Study Area	Definition	Rationale
The Project Site Boundary (PSB)	The DCO Order Limits. Refer to Diagram 7.1 in Chapter 7: <i>Land use and socio-economics</i> (document reference 6.1.7) for a map of the PSB	The PSB study area is used for effects which are at the Project Site level. It is used for the assessment of displacement / loss of businesses.
Community Impact Area (CIA)*	A 500m radius around the PSB	The CIA is used to assess the displacement / loss of community uses, such as open spaces, public rights of way and other recreational or community facilities as the community uses affected will be in or near the Project Site.
Dartford	The borough boundary of Dartford local authority	The Dartford dwelling requirements are used to assess the impact of the displacement of dwellings as a result of property acquisition on the Dartford housing market.
Core Study Area (CSA)	Dartford, Gravesham and Thurrock (local authorities)	The three local authorities that the Project Site falls within. Many of the effects are expected at the CSA.
Sub-Regional Context Area ¹ (SRCA)	Kent and Medway, Essex, Thurrock (combination of districts)	This study area is presented in the baseline for context but is not used to assess the significance of any effects.
Labour Catchment	A 60-minute travel time	60-minutes is considered a reasonable commuter

¹ Defined as county / unitary authorities to be consistent with ONS statistical data releases.

Geographical Study Area	Definition	Rationale
Area (LCA)	(car or public transport) to the site ² .	time for an employee. This study area is used to assess employment effects given it is likely that the majority of workers will come from within this study area.
Regional Context Area (RCA)	South East, East and London	This study area is presented in the baseline predominantly for context. This area is used to assess the significance of one effect – trade diversion from other theme parks. This is because the majority of other top theme parks in the UK are also located within the RCA.
National Area	England, Great Britain, United Kingdom (depending on data source availability)	Due to the nationally significant nature of the London Resort, some socio-economic effects need to be considered at a national level.

**Note: The CIA does not precisely correspond to a 500m radius around the PSB as at the point of submission. It is slightly larger than a 500m radius. During statutory consultation, some stakeholders stated that this boundary should be no smaller than that defined for the PEIR to ensure all potential effects on community facilities and public services are captured within the study area. Therefore, although the PSB has marginally decreased in area since the PEIR was published, the CIA study area has been kept the same.*

CONSTRUCTION PHASE

Employment generation and effects on businesses in the supply chain

7.3.4 The London Resort is expected to support a large construction workforce. To understand the impact of this, it is important to understand the existing construction employment and construction workforce availability.

Number and proportion of construction workers

7.3.5 In 2019, there were 17,300 working age residents in the CSA that were employed in construction; 8.5% of the total residential workforce. The LCA had 361,000 residents employed in the construction workforce, accounting for 8.3% of the residential workforce. Within the LCA, the largest individual supply of construction workers of any local authority within 60-minutes of London Resort is in the London Borough of Newham. Newham is home to 20,300 construction workers³ and has an average peak

² Travel time data for car and transit modes of travel are sourced from the Google Maps distance matrix API. For PT travel times, Ebbsfleet International or Tilbury (whichever is closer for each MSOA) is taken as the end point of the journey. It has then been assumed that the onward transfer from Ebbsfleet and Tilbury to the site will take 10 minutes. These assumptions have been made in order to provide more realistic commutable labour market zones for consideration, because the travel time from both Ebbsfleet and Tilbury to the site will be considerably improved in the Future Baseline as a result of the scheme. The simplistic assumptions made here are illustrative but likely to be materially appropriate for these purposes.

³ ONS, Annual Population Survey, 2019

hour commute time to the Project Site of 33-minutes by car and 44-minutes by public transport.

7.3.6 By comparison, 9.3% of SRCA total workforce is employed in construction, compared to 7.4% in RCA and 7.2% nationally, showing that the local study areas have a higher prevalence of construction workers than the larger / further afield study areas. This is likely to reflect the scale of construction activity that has taken place in these areas historically, placing a larger requirement for a construction workforce, and making the construction sector more attractive to residents.

Table 7.3.2 Working age residents employed in construction, January to December 2019

	Working age residents employed in construction	Total workforce	% of employed residents working in construction
CSA	17,300	203,000	8.5%
SRCA	161,000	1,723,100	9.3%
LCA	361,000	4,330,600	8.3%
RCA	913,700	12,396,300	7.4%
UK	2,335,900	32,551,900	7.2%

Source: ONS, Annual Population Survey, 2019; Volterra calculations

Sub sectors of construction employment

7.3.7 In 2018, the LCA had 221,500 workplace based construction workers and the CSA had 13,010 workplace based construction workers – accounting for 4.5% and 7.8% of the LCA and CSA total workplace-based workers, respectively. Of these, 27% worked in electrical, plumbing and other construction installation activities, whilst a further 24% worked in the construction of residential and non-residential buildings. These two subsectors were the largest in terms of construction employment in the SRCA, LCA, RCA and GB. The CSA appears to have a large proportion of their workplace construction workforce employed in other specialised construction activities (19%) compared to the SRCA, LCA, RCA and national levels (13%, 8%, 8%, and 11% respectively).

Table 7.3.3 Construction sub-sector employment, 2018

	CSA		SRCA	LCA		RCA	GB
Electrical, plumbing and other construction installation activities	3,500	27%	28%	53,000	24%	25%	26%
Construction of residential and non-residential buildings	3,100	24%	23%	64,000	29%	28%	24%
Building completion and finishing	1,900	14%	16%	32,000	14%	16%	16%
Construction of other civil engineering projects	600	4%	6%	16,000	7%	8%	9%

	CSA		SRCA	LCA		RCA	GB
Development of building projects	500	4%	7%	26,000	12%	10%	7%
Construction of roads and railways	200	2%	5%	8,500	4%	4%	4%
Demolition and site preparation	800	6%	2%	3,000	1%	1%	2%
Construction of utility projects	30	0%	0%	800	0%	1%	1%
Other specialised construction activities n.e.c.	2,500	19%	13%	18,500	8%	8%	10%
Total construction workforce	13,000⁴	100%	100%	221,500	100%	100%	100%
Total workforce	163k		1.4m	4.9m		12.4m	30.8m
% of total workforce employed in construction	7.8%		6.8%	4.5%		4.7%	4.8%

Source: ONS, Business Register and Employment Survey, 2018.

Construction business counts by size

7.3.8 In 2019, there were 3,200 construction firms in the CSA, accounting for 22% of all firms. This is a higher proportion than the SRCA (19%) and substantially higher than the regional and national comparators (13%).

Table 7.3.4 Construction business counts, 2019

	Construction firms	All firms	Proportion of all firms
CSA	3,200	14,800	22%
SRCA	26,600	143,500	19%
RCA	154,700	1,208,900	13%
UK	343,700	2,718,400	13%

Source: ONS, UK Business Counts, 2019. Note: due to data availability, LCA estimates have been excluded due to unreliable data.

7.3.9 In 2019, 96% of construction firms in the CSA were micro firms (firms with less than 10 employees), broadly in line with the SRCA, RCA and UK comparators (95.4%, 95.6% and 94.4% respectively). The CSA has a slightly smaller proportion of medium firms (0.3%) compared to the other geographies, but 0.2% of firms are large firms, compared to 0.1% in all other geographies.

⁴ Due to rounding in the original datasets, this total does not match that of Table 7.3.44

Table 7.3.5 Construction businesses by size (number of employees), 2019

	CSA	SRCA	LCA	RCA	UK
Micro (0 to 9)	96.0%	95.4%	96.0%	95.6%	94.4%
Small (10 to 49)	3.6%	4.0%	3.5%	3.8%	4.9%
Medium (50 to 249)	0.3%	0.5%	0.5%	0.4%	0.6%
Large (250+)	0.2%	0.1%	0.1%	0.1%	0.1%

Source: ONS, UK Business Counts, 2019

Mobility

7.3.10 The construction workforce is known for being highly mobile compared to other industries. CITB construction workforce mobility regional reports demonstrate that, in 2018/19, approximately half of workers in the South East and East and approximately a third of workers in London travelled at least 50 miles to work in the 12 months prior to the survey. Construction workers in the South East travelled an average of 27 miles from their residence to work, slightly higher than workers in the East (24 miles) and higher than the UK construction worker average of 18 miles. By comparison, the average commuting distance across England for all commuters was 9.0 miles, 10.5 in the South East, 11.5 in the East and 7.8 in London, highlighting that on average construction workers travel double the distance to work than the average across all industries.⁵

Table 7.3.6 Construction workforce mobility in the South East, East and London

		South East	East	London	UK
Proportion of construction workforce who travelled at least 50 miles from their home to work in the last 12 months		48%	52%	34%	*
Proportion of construction workforce who travelled at least 10 miles from their home to work in the last 12 months		17%	15%	13%	17%
Proportion of construction workforce who are staying in temporary accommodation		7%	5%	10%	5%
Average commuter distance (miles)	Construction workers	27	24	16	18
	All Industries (National Travel Survey)	10.5	11.5	7.8	9.0 (England)

Sources: CITB Workforce Mobility and Skills Reports (South East, East of England and Greater London), 2019; National Travel Survey FY18. *denotes missing data.

⁵ National Travel Survey, Table NTS2212, FY18

Workforce availability (unemployment, NEETs, churn, claimants)

7.3.11 In 2019, there were 8,700 unemployed people in the CSA; an unemployment rate of 4.2%. Apart from the LCA, this is higher than the unemployment rate recorded across all other geographical comparators. The LCA is estimated to have 173,000 unemployed people at a rate of 4.0%; higher than the national and regional comparator.

Table 7.3.7 Unemployment and unemployment rate, January to December 2019

	Unemployed	%
CSA	8,700	4.2%
SRCA	60,600	3.5%
LCA	173,000	4.0%
RCA	461,000	3.7%
UK	1,290,300	4.0%

Source: ONS, Annual Population Survey, 2019

7.3.12 A young person not in education, employment or training (NEET) provides a potential source of workforce. NEETs are a part of the labour force which may benefit from the employment and skills initiatives offered by the London Resort. Data is not available at the CSA level, therefore the SRCA is used to proxy the NEET availability. In the three months to February 2019, there was an average of 3,720 16 to 17 year olds in the SRCA that were classified as NEET. The majority of these were in Kent (2,070). The count of NEETs as a proportion of 16 to 17 year olds was 5.1%, which is slightly higher than the RCA (4.9%) and slightly lower than England (5.5%). The proportional representation of NEETs is noticeably higher in Medway (6.9%) and Kent (6.4%).

Table 7.3.8 NEETs 2018-19

	NEETs (aged 16 to 17)	NEETS (as a proportion of 16 to 17 year olds)	Of which known to be NEET	Of which activity not known
SRCA	3,720	5.1%	2.6%	2.5%
<i>Kent</i>	<i>2,070</i>	<i>6.4%</i>	<i>2.8%</i>	<i>3.6%</i>
<i>Medway</i>	<i>440</i>	<i>6.9%</i>	<i>2.8%</i>	<i>4.1%</i>
<i>Thurrock</i>	<i>60</i>	<i>1.6%</i>	<i>1.6%</i>	<i>0.0%</i>
<i>Essex</i>	<i>1,150</i>	<i>3.7%</i>	<i>2.4%</i>	<i>1.3%</i>
RCA	23,410	4.9%	2.3%	2.7%
England	61,830	5.5%	2.6%	2.9%

Source: Department for Education, NEET and participation: local authority figures, 2018-2019

7.3.13 Labour market churn (employees moving from one job to another) is also an indication of the proportion of the workforce that will become available within a given year. As can be seen from 7.3.13, the majority of construction workers in all geographies expect

to move jobs within the next 12 months.

Table 7.3.9 Proportion of construction workforce that expected to be at their current job for less than 12 months

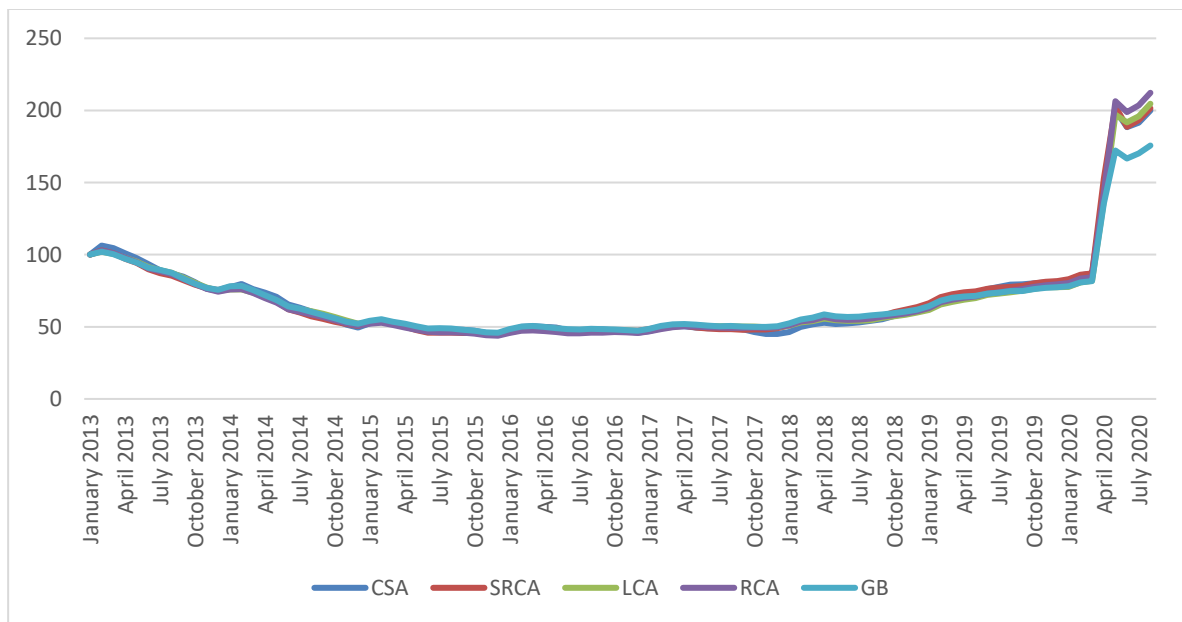
	South East	East	London	UK
Proportion	67%	70%	73%	66%

Source: CITB Workforce Mobility and Skills Reports (South East, East of England and Greater London), 2019

7.3.14 According to an ONS survey of employment, 30% of construction workers are with a different employer from that which they had 12 months prior and 5% moved from being employed to not in employment within 12 months. This is compared to 29% and 6% across all industries, implying that construction worker annual churn is on par with that of all industries.⁶

7.3.15 Given the recent pandemic, it is important to check that the most recent statistics of certain metrics have not been affected in such a way that they would not be representative of the pre-pandemic state of the baseline. Diagram 7.3.1 shows that there has been a pronounced increase in claimants in all geographies since the beginning of 2020. In order to remove the impacts of the pandemic, therefore, average counts from each month in 2019 have been used to inform worker availability.

Diagram 7.3.1 Index of all claimants, January 2013 = 100



Source: ONS, Claimant Count, 2013 to 2020

7.3.16 In 2019, there were an average of 6,000 claimants in the CSA and 51,000 in the SRCA, which includes those claiming jobseekers allowance and unemployment related

⁶ ONS, Employee turnover levels and rates by industry section, UK, January 2017 to December 2018

universal credit. As a proportion of the 16-64 population, claimants account for 2.6% in the CSA and in the LCA, slightly lower than GB level (2.6%) but higher than the SRCA (2.4%) and RCA (2.2%).

Table 7.3.10 Claimant count, 2019

	CSA	SRCA	LCA	RCA	GB
All claimants	6,000	51,000	143,000	344,000	1,101,000
Proportion of 16-64 year olds	2.6%	2.4%	2.6%	2.2%	2.6%

Source: ONS, Claimant Count, 2020; ONS, 2019 Mid-year population estimates

Future baseline – construction employment

7.3.17 In 2019, the Construction Skills Network estimated that 168,500 UK construction jobs would be created between 2019 and 2023, reaching 2.79 million in 2023. This equates to 0.5% annual growth, in line with the whole economy average.⁷ Table 7.3.11 displays the growth in each relevant region.

Table 7.3.11 Construction employment growth 2019-2023

	Construction jobs required (2019 to 2023)	Total construction jobs 2023	Growth (2019 – 2023)	Annual growth
South East	13,200	429k	3.9%	0.8%
East of England	24,550	250k	2.0%	0.4%
Greater London	17,800	453k	4.8%	0.9%
UK	168,500	2.79m	2.6%	0.5%

Source: CITB, Construction Skills Network forecasts 2019-2023, 2019; Volterra calculations.

7.3.18 The approach to construction employment assessment is not inherently cumulative, and so construction workforce requirements for schemes in the local area are considered separately. Table 7.3.12 displays cumulative schemes (from Appendix 14.11: *Schemes for Cumulative Assessment* (document reference 6.2.14.11) whose construction period overlaps with that of the London Resort. For each scheme, the table shows the specific workforce information contained in the applications and the estimated worker per year conversion (if required). Notably, information was not available for four of the schemes. In total, the schemes are expected to require a total average of 6,070 workers per year in 2023 and 1,705 in 2028. To place this in context, the 2023 figure represents 1.7% of the construction workers living in the LCA.

⁷ CITB, 2019, Construction Skills Network forecasts 2019-2023

Table 7.3.12 Construction workforce requirements for cumulative schemes in the area

Cumulative scheme (with construction period overlapping with that of the London Resort)	Construction period	Relevant LR peak(s)	Application information regarding construction workforce	Estimated annual workforce requirement (and description of conversion assumptions where required)
Lower Thames Crossing	2021-2027	2023	900 (peak workforce)	900 (use peak in absence of more information)
Riverside Energy Park, by Cory Riverside Energy	2021-2024	2023	1,097 (peak workforce per month)	1,097 (use peak per month in absence of more information)
M25 junction 28 improvements, by Highways England	2022-2024	2023	*	*
Extension to Allington Energy from Waste Facility	2021-2024	2023	*	*
Eastern Quarry, Swanscombe by Barton Wilmore.	2007-2025	2023	1,150 (FTEs over whole period)	639 (Use standard assumption that 1 FTE = 10 job years to get total job years, then average for 18 year construction period)
A2 Bean and Ebbsfleet Junction Improvements by Highways England.	2020-2022/3	2023	100 (peak workforce)	100 (use peak in absence of more information)
Stone Lodge Complex by BAM Construction.	2018-2023	2023	*	*
Northfleet Embankment, by Keepmoat Homes Ltd.	2017-2024	2023	143 (FTEs per month)	204 (Assume per month FTE = per year FTE. Use standard assumption that 1 FTE = 10 job years to get total job years, then average for 7 year construction period)
Land East Of Caspian Way	2018-2034	2023 2028	1,250 (workers per annum)	1,250
C.Ro Ports London Ltd Purfleet Thames Terminal	2017-2022	2023 (worst case)	*	*
Thames Enterprise Park The Manorway Coryton Essex	2018-2031	2023 2028	201 (FTEs over whole period)	155 (Use standard assumption that 1 FTE = 10 job years to get total job years, then average for 13 year construction period)
Langdon Hills Golf And Country Club	2020-2023	2023	335 (job years per annum)	355

Cumulative scheme (with construction period overlapping with that of the London Resort)	Construction period	Relevant LR peak(s)	Application information regarding construction workforce	Estimated annual workforce requirement (and description of conversion assumptions where required)
Eastgate Centre Southernhay Basildon Essex**	Unknown dates, 12 years long	2023 2028 (worst case)	360 (FTEs over whole period)	300 (Use standard assumption that 1 FTE = 10 job years to get total job years, then average for 12 year construction period)
Outline application for a mixed development and comprising: up to 532 Homes, up to 46,000 sq. m Employment Floorspace and a Mixed Use Neighbourhood Centre	2017-2027	2023	1,600 (job years)	80 (average per year over 10 years of construction)
Silvertown Tunnel by Transport for London	2019 - 2023	2023	1,010 (peak workforce)	1,010 (use peak in absence of more information)

Note: * denotes missing data. ** based on redacted figures in the absence of more up to date information.

COVID-19

- 7.3.19 The adverse impact of the COVID-19 pandemic on the economy at large has been relatively severe since the outbreak began. In particular, the labour market is a segment of the economy that has been heavily affected by the restrictions that have been put in place to curb the virus. Such restrictions have resulted in a contraction in economic activity, forcing many businesses to place their employees on furlough. National statistics indicate that the number of furloughed workers within the construction industry peaked in mid-April, with c. 49% (721,000 jobs) of UK construction workers being furloughed (14th April 2020).⁸ This number has since fallen: the most recent data (31st July 2020) shows that in late July, approximately 19% (277,000 jobs) of construction workers were reported to be on the job retention scheme, equivalent to a 62% reduction from peak levels. When compared to other sectors, the recent reduction in furloughed construction workers is the 2nd fastest decrease (out of 19 sectors) in relative terms, indicating the potential for an earlier recovery than other industries.
- 7.3.20 Whilst the immediate economic effects of the pandemic are highly severe, available initial forecasts point toward a short-term impact with economic recovery to pre-

⁸ ONS (2020), Coronavirus Job Retention Scheme statistics: September 2020

pandemic levels anticipated to have occurred by 2022 (the first year of construction).⁹ The data shows that UK GDP fell by 20% between 2019 Q4 (pre-pandemic) and 2020 Q2.¹⁰ This sharp decline in GDP is the most severe quarterly reduction since records began in 1955. An economic contraction of this scale over a relatively short period of time means that the UK economy entered its first recession since the 2008 financial crisis. However, future projections predict that GDP will revert back to its pre-pandemic level by the end of 2021.¹⁰ With that being said, the degree to which these forecasts can be relied upon is largely dependent on how the pandemic evolves and the response of central government, businesses and households over time. Given this uncertainty, these forecasts should be treated with caution.

Labour market, skills and training

7.3.21 The London Resort will provide a valuable opportunity to raise the qualifications of construction workers, providing upskilling and training opportunities. To assess the impact of this, the existing level of skills and training in the construction labour market need to be understood.

Resident qualifications

7.3.22 The qualification levels of the workforce within specific industries are not available. The qualifications of the whole resident workforce therefore provide an indication of likely construction qualifications, since construction workers make up part of the overall residential population. In 2019, only 33% of CSA residents were qualified to NVQ4+ level, comparable to the SRCA (35%) but lower than the RCA (46%) and the UK (40%). Of all CSA residents, 9% had no qualifications – slightly higher than the SRCA and UK levels (8%) and higher than the RCA (7%). These statistics imply that working residents of the CSA are qualified to a lower level than other geographical comparators.

Table 7.3.13 Resident qualifications, January to December 2019

	CSA	SRCA	LCA	RCA	UK
NVQ4 or above	33%	35%	45%	46%	40%
NVQ3 or above	52%	54%	61%	62%	58%
NVQ2 or above	72%	73%	75%	78%	76%
NVQ1 or above	83%	85%	84%	87%	86%
Other Qualifications	7%	6%	8%	7%	7%
No Qualifications	9%	8%	8%	7%	8%

Source: ONS, Annual Population Survey, 2019

Workplace qualifications

7.3.23 Table 7.3.14 shows qualifications of the whole workforce across the various study

⁹ HM Treasury (2020) Forecasts for the UK economy

¹⁰ Bank of England (2020) Monetary Policy Report August 2020

areas, not specific to construction. The Census 2011 is the most recent reliable and comprehensive source available for industry specific data. This shows that 23% of workers (all industries) in the CSA are qualified to level 4 and above – far lower than the RCA (40%) and England (35%). On the other hand, 19% of workers in the CSA are qualified to level 1, which is higher than RCA (13%) and England (14%). The CSA also has a larger proportion of workers that have no qualifications (13%) than RCA (9%) and national (10%) comparators, but marginally more with apprenticeships or other qualifications (11% in comparison to 9% across England). This implies that workers in the CSA are generally qualified to a lower level than the regional and national comparators.

Table 7.3.14 Workplace qualifications (all industries), 2011

	No qualifications	Level 1	Level 2	Level 3	Level 4 and above	Apprenticeships and other qualifications
CSA	13%	19%	20%	14%	23%	11%
RCA	9%	13%	15%	13%	40%	10%
England	10%	14%	17%	15%	35%	9%

Source: ONS, 2011, Census. Note: LCA and SRCA estimates have been excluded due to unreliable data.

Construction qualifications

7.3.24 The most recent source for workplace based qualifications by industry is the 2011 Census. In 2011, 14% of construction workers in the CSA were qualified to Level 4 or above (degree level qualification or higher) – lower than the RCA (18%) and UK (17%). All three geographical areas have 13% of construction workers with no qualifications. Comparing this with the qualifications across the whole workforce shows that construction workers are similarly likely to have no qualifications, but considerably less likely to have Level 4 or above level qualifications. This is further accentuated by the lower rate of higher level qualifications in the CSA, which is true both generally across workers, but also specifically within the construction industry. Apprenticeships are a more prevalent form of qualification across the construction industry than the national average across all sectors, and the CSA's rate of qualification is on par with the national and regional levels.

Table 7.3.15 Construction qualifications, 2011

	CSA	RCA	UK
Level 4 or above	14%	18%	17%
Level 3	17%	15%	17%
Level 2	20%	17%	17%
Level 1	19%	16%	16%
Apprenticeship	18%	19%	19%
No Qualifications	13%	13%	13%

Source: ONS, 2011, Census. Note: due to data availability, LCA and SRCA estimates have been excluded due to unreliable data.

Construction worker incomes

- 7.3.25 The Annual Survey of Hours and Earnings shows that as of 2019, construction workers within the CSA earned an estimated annual income between £38,300 (residence based) and £38,500 (workplace based).¹¹
- 7.3.26 The residence-based annual income of construction workers in the CSA, at £38,300, is slightly lower than the SRCA (£39,400) and RCA (£39,300), but higher than the corresponding national average (£36,500). In contrast, the workplace-based annual income of construction workers in the CSA, at £38,500, is higher than that of any other study area.
- 7.3.27 Across all geographies and whether residence- or work-place based, the construction industry annual incomes are higher than the average across all industries.

Table 7.3.16 Annual incomes of construction workers, 2019

	Residence based		Workplace based	
	Construction	All industries	Construction	All industries
CSA	£38,300	£31,900	£38,500	£32,000
SRCA	£39,400	£32,800	£36,100	£30,100
RCA ¹²	£39,300	£32,800	£37,700	£31,400
UK	£36,500	£30,400	£36,500	£30,400

Sources: ONS, EARN03 Average Weekly Earnings, 2019; Annual Survey of Hours and Earnings, 2019. Note: LCA estimates have been excluded due to unreliable data.

¹¹ Annual income estimates for construction workers are obtained by calculating the income differential between the weekly earnings of the construction industry and all industries. In order to factor in the seasonality of construction incomes, the income differential is based on a 12-month average of weekly earnings. The differential is applied to annual incomes for relevant study areas from ASHE.

¹² London has been excluded from the RCA to avoid skewing the earnings data.

Construction, Planning and the Built Environment Apprenticeship starts

7.3.28 According to the Department for Education, there were 140 starts in the CSA in construction, planning and the built environment in the academic year 17/18. Starts in this sector equated to 6% of all apprentices in the CSA for that academic year, in line with England (6%), slightly higher than the RCA (5%) and slightly lower than the SRCA and South East LEP (SELEP) (7%). The number of starts has been slowly rising over time; there were 75% more starts in 17/18 in the CSA than in 14/15. Growth in starts over time has also been observed at the other geographies, but the growth was fastest in the CSA.

7.3.29 In 17/18, there were 70 apprenticeship achievements in the CSA. Over the period 14/15 to 17/18, the CSA has seen an annual average achievement rate of 48%. This is slightly higher than the RCA (47%), SRCA and SELEP (44%) and slightly lower than the England level (51%).

Table 7.3.17 Apprenticeship starts in construction, planning and the built environment, academic years 14/15 to 17/18

	14/15	15/16	16/17	17/18			
	Starts	Starts	Starts	Starts	% of all starts	Achievements	Annual average achievement rate (14/15 to 17/18)
CSA	80	110	110	140	6%	70	48%
SRCA	1,100	1,300	1,370	1,600	7%	800	44%
SELEP	1,270	1,460	1,550	1,770	7%	880	44%
RCA	4,920	5,870	5,710	6,630	5%	3,150	47%
England	18,390	21,560	21,390	22,870	6%	12,540	51%

Source: Department for Education, 2019, Apprenticeships and trainee data

The construction skills crisis

7.3.30 According to BCTG,¹³ the 2008 recession had a disproportionately negative impact on the construction sector, leading to a loss of skilled individuals and resulting in changes to the scale and composition of the business base. Tough economic conditions and market uncertainty also resulted in a substantial fall in apprenticeship completions in construction related industries. The UK's impending departure from the European Union will most likely put additional pressure on the skills system as immigration is restrained across the UK.

7.3.31 The construction industry is facing a skills crisis. In 2016, 20% of surveyed construction companies reported a skills gap within the existing workforce, suggesting an increase of prevalence in recent years (although, notably, skills shortages have always been an

¹³ BCTG Construct, 2018, Supervisory Skills Gaps within the UK Construction Industry.

issue). It is important that, along with construction trainees, supervisors are provided with the correct training to ensure quality assurance and safe project management, as well as being able to properly train recruits. They must have the capacity to respond to changing project requirements within a constantly evolving industry. Skills levels must therefore be maintained to ensure that outcomes are delivered efficiently and to a high standard.¹⁴

- 7.3.32 The workforce is aging, with 22% of the workforce over 50 and 15% in their 60s. The total number of workers aged over 60 had increased more than any other age group in recent years, with the greatest reduction in under 30 groups.¹⁵ A large number of the workforce are retiring early. As they exit the market, they take with them not only a skillset but also a valuable teaching resource.
- 7.3.33 Training is lacking within the industry. In 2015, only 53% of the workforce were trained, which is third lowest compared with other industries.¹⁶ Public funding cuts have meant that there are less resources to train because firms do not want to take on the (time and cost) burden themselves.
- 7.3.34 As well as training barriers inside the industry, the sector is not attractive; two thirds of school leavers and graduates would not consider pursuing a career in construction. Young people view jobs in the industry as low status, dirty or badly paid.¹⁷ Women only make up 13% of the entire workforce.

Future baseline – construction labour market, skills and training

- 7.3.35 The Construction Skills Network forecast stated that the most in demand jobs over the 2019-2023 period (in absolute terms) would be: other construction process managers (3,420), other construction professional and technical staff (3,260) and wood trades and interior fit-out (2,380). In terms of base 2019 employment, the biggest requirements were predicted for scaffolders (3.1%), logistics personnel (2.6%), and plant operatives (2.3%).¹⁸
- 7.3.36 MACE estimates that over the next two decades, 600,000 construction employees may need to be reskilled due to trades being vulnerable to technological change and new roles being created by technology.¹⁹ The report finds that the number of people working in occupations such as plastering, bricklaying and labouring is likely to fall by tens of thousands of people in the next 20 years. BCTG state that the next decade will demand multi-disciplinary skills that enable integration right through the supply

¹⁴ CITB, 2011, Management and Supervisory Skills Research

¹⁵ Chartered Institute of Building (CIOB) (2015). The Impact of an Ageing Workforce

¹⁶ UKCES (2016). Employer Skills Survey 2015: UK Results

¹⁷ Marriot & Moore (2014). NHBC Foundation: improving recruitment of young people into home building : a literature review

¹⁸ Construction Skills Network forecasts 2019-2023, 2019

¹⁹ MACE, 2017, Insights 2017: Moving to Industry 4.0: A skills revolution

chain.²⁰

COVID-19

7.3.37 In terms of skills and training, there is a lack of evidence to suggest that these elements of the construction workforce have been directly affected by the pandemic. It may, however, be the case that prolonged restrictive measures to help curb the pandemic, could induce a long term reduction in demand for skilled construction workers, which might in-turn lessen the incentive for workers to attain such skills, causing a skill shortage in the long term. However, initial statistics show that whilst the severe economic impacts of the COVID-19 pandemic continue to adversely affect several employment sectors, the construction labour market appears to be one of the sectors showing early signs of recovery.⁸ The gradual easing of restrictions on workforce mobility has led to many workers being able to return to on-site operations. If the economy avoids a second period of significant further lockdown measures, it can be anticipated that the demand for skilled construction labour is likely to return to pre-pandemic levels in the short and long term.

Crime levels

7.3.38 Concerns are often raised on major projects that the presence of a large construction workforce can affect crime levels and anti-social behaviour. The crime baseline in the CSA is therefore considered here.

Anti-social behaviour

7.3.39 Across the CSA, it was reported that approximately 9,000 anti-social behaviour (ASB)²¹ incidents were recorded in 2018, equivalent to 23 per 1,000 population. Comparatively, this is relatively lower than the regional average recorded across the SRCA (Kent and Essex), where 80,800 incidents were recorded at a rate of 27 per 1,000 population. Table 7.3.18 provides a disaggregated breakdown of ASB incidents by local authority and regional area.

Table 7.3.18 ASB per 1,000 population (2018)

Area	Recorded incidents	per 1,000 population
Dartford	1,900	17
Gravesham	2,300	21
Thurrock	4,800	28
CSA	9,000	23
Kent	32,200	21
Essex	48,600	33

²⁰ BCTG Construct, 2018, Supervisory Skills Gaps within the UK Construction Industry.

²¹ 'Anti-social behavior' can be defined by the following offences: misuse of public space; disregard for the community or personal well-being; acts directed at the person; environmental damage

Area	Recorded incidents	per 1,000 population
SRCA ²²	80,800	27

Source: Gravesham Borough Council, 2019, Gravesham Anti-Social Behaviour Strategy; Thurrock Council, 2019, Thurrock Anti-Social Behaviour Strategy

National crime data

7.3.40 Table 7.3.19 shows that there were 114 crime incidents per 1,000 population in 2019 in the CSA, a 35% higher prevalence of crime than the average across England and Wales (84 per 1,000). The type of crime with the highest rate in the CSA was violence without injury (20 per 1,000) which was almost double the national rate of 11. For many types of crime, the CSA is in line with, or only slightly higher than England and Wales rates, however criminal damage and arson, shoplifting, stalking and harassment, vehicle offences and violence with injury are all higher in the CSA than the national rate.

Table 7.3.19 Crime incidents per 1,000 population, year ending December 2019

	CSA	England and Wales
All other theft offences	9	8
Bicycle theft	1	1
Burglary	7	6
Criminal damage and arson	13	9
Death or serious injury caused by illegal driving	0	0
Drug offences	2	3
Homicide	0	0
Miscellaneous crimes against society	3	2
Non-residential burglary	2	2
Possession of weapons offences	1	1
Public order offences	9	7
Residential burglary	5	4
Robbery	1	1
Sexual offences	3	3
Shoplifting	9	6
Stalking and harassment	12	8
Theft from the person	1	2
Vehicle offences	12	7
Violence with injury	10	9
Violence without injury	20	11
Total	114	84

Source: ONS Crime Statistics, 2019

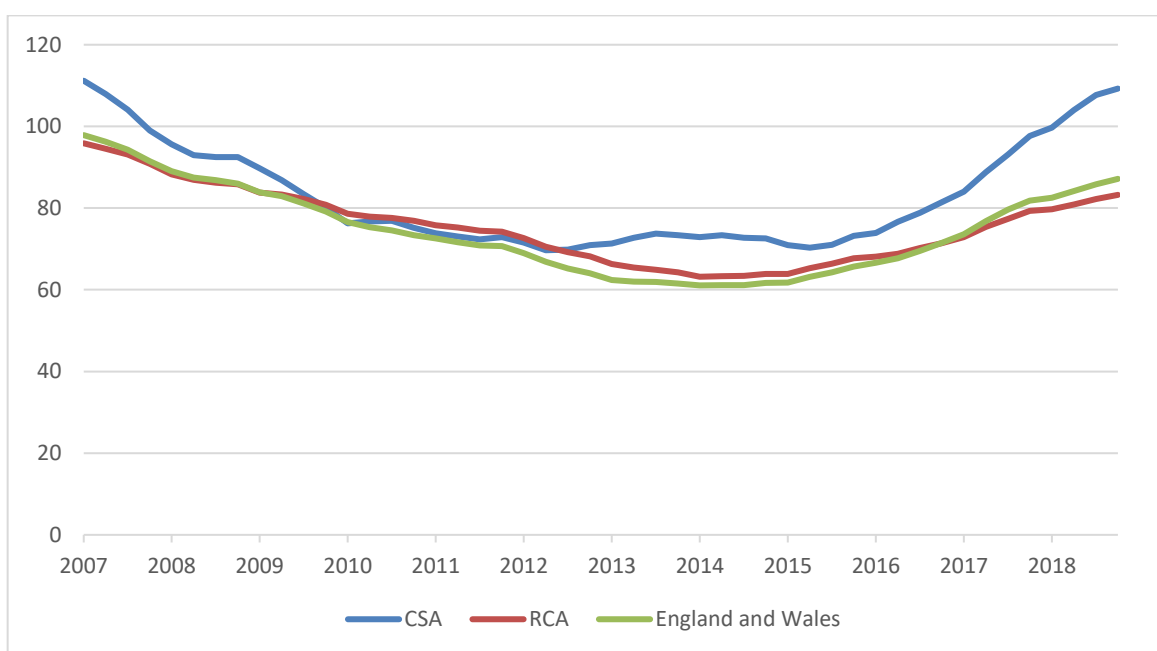
²² SRCA data has been used as an alternative comparator due to a lack of recent ASB data at the national level

7.3.41 Data from the 2019 Index of Multiple Deprivation shows that Dartford, Gravesham and Thurrock collectively rank within the top 25% most deprived areas when it comes to crime.²³ Individually, Dartford and Gravesham rank as the 6th and 19th most deprived local authorities in terms of crime (out of 317 local authorities), whereas Thurrock ranks 75th on that list. In comparison to other local authorities, the CSA therefore performs particularly poorly when it comes to crime.

Crime over time

7.3.42 Over time, Diagram 7.3.2 shows that whilst crime levels per 1,000 population in the CSA have generally moved in the same direction as the corresponding trends exhibited by both the RCA and nationally (both rising in the past three years), there has been a relatively faster increase in the rate of crime in the CSA since 2016 than other comparators, indicating a persistently more pronounced problem with crime in the CSA.

Diagram 7.3.2 Number of crimes per 1,000 population, 2007 – 2018



Source: ONS Crime Statistics, 2018 – Police Force Area Data Tables

Future baseline – crime levels

7.3.43 This report found no data to inform the future baseline, and effects are assessed against the current baseline levels.

²³ Index of Multiple Deprivation, 2019 MHCLG

COVID-19

7.3.44 Initial reports on the impact of the COVID-19 pandemic on crime point towards widespread reductions. National surveys conducted over the period April to May 2020, found that total crime (excluding fraud and computer misuse) decreased significantly by 32% when compared with a pre-lockdown two-month average.²⁴ This reduction can be mainly attributed to falls in theft offences as lockdown measures prevented opportunities to engage in such behaviour. Police recorded crime levels during the lockdown period also exhibit a similar trend, as figures were much lower than respective months in 2019, with 25% less crime in April 2020 and 20% less crime in May 2020. However, the gradual easing of lockdown measures coincided with a 12% increase in crime from April to May. Therefore, the recent fall in crime appears to be temporary. In the long term, it is likely that crime in general will revert back to pre-pandemic levels.

Local healthcare

7.3.45 The large construction workforce supported by the London Resort could require local healthcare services in the form of GPs, dentists, pharmacies and emergency care. Existing healthcare provision is therefore considered here, so that the relative additional strain on healthcare provision can be determined.

Primary healthcare

7.3.46 Data on GP provision across the CIA shows that three GP practices are situated on the north side of the river, two of which are within a 500m radius (CIA) of the site. On the south side, three GPs have been located that do not strictly lie within the CIA but are within close proximity of the boundary (Diagram 7.3.3) and hence are factored into the analysis. A 7th GP (Swanscombe Health Centre) has been identified in the CIA, however there is no data available for this surgery.

7.3.47 Across all six GPs, a total of approximately 86,400 patients are currently registered, and are served by 23.6 FTE practitioners. This equates to a ratio of 3,700 patients for every GP FTE. There are a total of 178.4 FTE GPs across the CSA, which serve over 420,000 patients, resulting in a ratio of 2,400 patients for every GP FTE. The CSA, but the CIA in particular, therefore has a patient to GP ratio which is considerably higher than the recommended benchmark set by the Department of Health and Social Care (DHSC), which currently stands at 1,800 patients per FTE GP.²⁵

²⁴ ONS, 2020. Coronavirus and crime in England and Wales: August 2020

²⁵ NHS London, 2009. HUDU Planning Contribution Model Guidance Reports.

Table 7.3.20 GPs in the CIA

Map ID	GP Name	Borough	Total Patients	Total GP FTEs	Patients per GP FTE
1	Commonwealth Health Centre	Thurrock	5,500	2.2	2,500
2	The Shrubbery Surgery	Gravesham	15,900	6.3	2,500
3	Bean Surgery	Dartford	20,400	5.9	3,400
4	Springhead Health	Gravesham	22,800	5.7	4,000
5	Tilbury Health Centre	Thurrock	11,500	2.5	4,600
6	Sai Medical Centre	Thurrock	10,300	1.0	10,300
-	Total - CIA	-	86,400	23.6	3,700
-	Total - CSA	-	420,700	178.4	2,400

Source: NHS Digital – GP Workforce Statistics March 2020

7.3.48 During pre-application consultation, Dartford and Thurrock confirmed the widespread constraints on GP capacity within the CSA, with some GPs opting to no longer accept new patients in order to reduce the burden on the local health care system. The extent to which GP provision is constrained can also be quantified by understanding the availability of GP's across the overall population. Under this metric, the constraints in the CSA are further emphasized, with the average GP FTE serving approximately 2,200 residents, higher than both the RCA and national level as shown in Table 7.3.21.

Table 7.3.21 Population per GP

Area	Population	Total GP FTEs	Population per GP FTE
Dartford	113,000	61	1,800
Gravesham	107,000	52	2,100
Thurrock	174,000	66	2,600
CSA	390,000	180	2,200
RCA	24,400,000	13,600	1,800
National	56,300,000	33,200	1,700

Source: NHS Digital, GP Workforce Statistics March 2020; ONS, Mid-year population estimates, 2019

7.3.49 Additionally, three pharmacies have been identified within the CIA. Two of these pharmacies fall just outside the PSB, namely Ackers Chemists Ltd and Swan Valley Pharmacy. The other pharmacy (Hill Pharmacy) lies just within the CIA boundary.

7.3.50 There are four NHS registered dental surgeries that are situated within the CIA. Across all four surgeries, a total of 14 dental practitioners carry out these dental services. NHS information on each surgery also indicates that only one of these practices is not taking

in new patients.

Table 7.3.22 Dental practices within the CIA

Dental practice name	No. of practitioners	Taking in new patients?
Aligndent NK Ltd	5	Yes
Hews House	1	No
Elite Dental Studio	4	Yes
Patiali Limited	4	Yes
Total	14	-

Source: NHS Dental Statistics, 2019-20

Diagram 7.3.3 Healthcare facilities in the CIA



Sources: Ordnance Survey, Addressbase Premium; Google Maps; Volterra calculations

Emergency healthcare

7.3.51 The nearest A&E to the site is Darent Valley Hospital, which is part of the Dartford and Gravesham NHS Trust. The Dartford and Gravesham Trust also covers Queen Mary's Hospital and Erith & District Hospital. These hospitals each contain a 24/7 urgent care centre, but these do not offer A&E services. On the north side of the river, the Basildon and Thurrock Trust is the main provider of A&E services at Basildon University Hospital.

The nearest major trauma centres to the PSB are the King’s College Hospital and Royal London Hospital located in London. The London Resort will contain a helipad for emergency use in the rare event of a major emergency incident. The Royal London Hospital is also the nearest hospital to the PSB and forms the most likely hospital to receive patients airlifted from the site as the only hospital in London, the East, or the South East with both a major trauma centre and helipad.

7.3.52 Table 7.3.23 shows the number of A&E attendances in 2018/19 and the percentage of A&E visits that were admitted, transferred or discharged within 4 hours at the Dartford and Gravesham Trust as well as the Basildon and Thurrock Trust. This is compared to that of the three other NHS Trusts falling under the Kent and Medway CCG that have Accident and Emergency (A&E) departments. It can be seen that the Dartford and Gravesham Trust as well as the Basildon and Thurrock Trust are both performing better than two of the other Trusts and slightly better than the national average for England, with respectively 87% and 83% of people being attended to in under 4 hours. No trusts hit the NHS target of 95% of A&E patients admitted, transferred or discharged within 4 hours, however this is also the case at the national level, demonstrating nationwide constraints.

Table 7.3.23 A&E attendances and performance

NHS trust name	A&E attendances 2018-19	Percentage admitted, transferred or discharged in 4 hours or less 2018-19
Dartford and Gravesham NHS Trust	132,300	87%
Basildon and Thurrock University Hospitals NHS Foundation Trust	131,290	83%
East Kent Hospitals University NHS Foundation Trust	221,400	70%
Maidstone and Tunbridge Wells NHS Trust	183,400	91%
Medway NHS Foundation Trust	125,900	80%
England	22,367,800	84%

Source: NHS Digital, 2018/19 - Provider level analysis for HES Accident and Emergency Attendances

Future baseline – healthcare

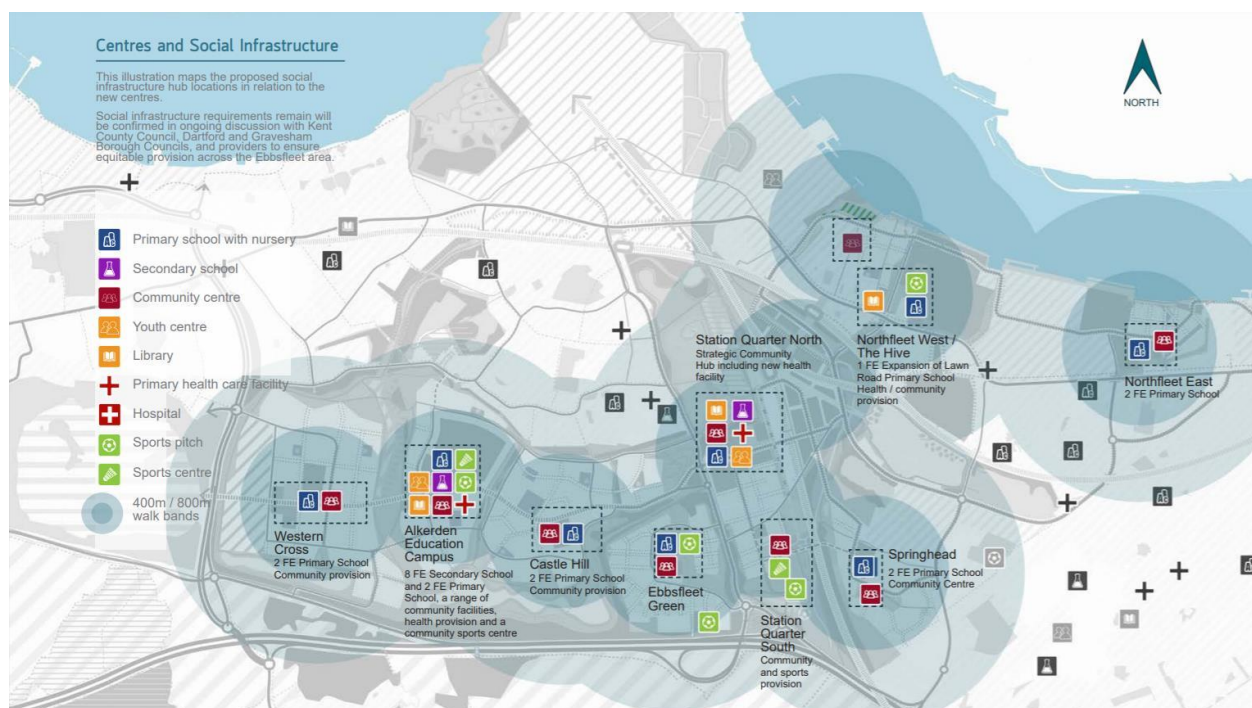
7.3.53 The Dartford Borough Council Infrastructure Delivery Plan²⁶ states that a new primary healthcare facility is to be provided within Ebbsfleet Garden City (EGC), although it is unsure of the timing of the delivery. Furthermore, a new primary healthcare facility is being provided at Stone / Greenhithe area (just outside the CIA) providing new facilities for three GP practices in order to meet demand from new housing development nearby. This will be delivered by 2022. The plan also mentions the potential expansion

²⁶ Dartford Borough Council, 2019, Infrastructure Delivery Plan

at Darent Valley Hospital in response to demand from development, but this is uncertain.

- 7.3.54 The developer of land west of Springhead Road in Northfleet will be making a financial contribution to the provision of a new health centre. The developer of land east of Caspian Way in Swanscombe is contributing 18,300 sqm of integrated medical and community facilities. Langdon Hills Golf and Country Club in Upminster will be providing a new health village for elderly residents requiring care. Consultation with EDC confirmed that there will be a new Urgent Treatment Centre at Gravesham Hospital, due to open in December 2020. This replaces some of the functions of a previous walk-in centre that has been closed down but will contain some additional capacity.
- 7.3.55 The Ebbsfleet Implementation Framework will be used by the EDC to shape and support its plans. The provisional locations of future primary healthcare facilities in the EGC Framework are shown in Diagram 7.3.4. This will help to meet some of the additional demand that new residents at EGC will impose.

Diagram 7.3.4 Centres and social infrastructure



Source: Ebbsfleet Development Corporation, *Ebbsfleet Implementation Framework Summary*, 2017

- 7.3.56 Thurrock's Health and Wellbeing Strategy²⁷ sets out the aim of delivering four new healthy living centres built with GPs, nurses, mental health services, wellbeing programmes, community hubs and outpatient clinics under one roof. One of these has already been handed over in Purfleet, in southern Thurrock, close to the Essex Project

²⁷ Thurrock Council, 2016, Health and Wellbeing Strategy

Site.

COVID-19

- 7.3.57 The pandemic has had a variety of effects upon the current baseline for health provision. In some ways, demand has increased dramatically, with far more patients requiring ventilation and intensive care units as a result of the virus. This sudden demand has placed additional stress on an already constrained health care system at the local and national levels.²⁸ Although, the immediate response to sufficiently meet this enhanced demand, has meant that the operating capacity of hospitals has managed to avoid entering a severe deficit in available capacity.²⁹
- 7.3.58 However, in other ways, demand has decreased dramatically. The NHS stated that millions of people were avoiding seeking treatment given concerns over the virus. In April 2020 (the height of the lockdown measures), A&E attendances were 57% lower than that of the monthly average for 2019. This was made up of a 49% drop in major attendances and a 72% drop in minor injury attendances. At the time of writing, the most recent A&E attendance figures were for August 2020, which are 20% lower than the 2019 monthly average (13% drop for major and 32% drop for minor attendances).³⁰ For GP surgeries, the total number of appointments recorded in GP systems decreased by 15% between March and August 2020, from 24 million to 20 million.³¹ The lack of attendance can, in some cases, mean that the patients' conditions become even more severe as they delay their treatment.
- 7.3.59 Additionally, a poll of more than 13,000 NHS doctors, 56% stated that care for patients without COVID-19 symptoms had worsened.³² Many surgeries started telephone appointments so as to decrease the risk to patients coming into the surgery and help them to avoid the virus risks.³³ However, these consultations can often be less effective than in-person.
- 7.3.60 This all implies that, whilst the complexities of the pandemic mean that it is difficult to fully gauge the overall impact that it is having on current health provision, demand from unseen patients or patients who received lesser quality care throughout 2020 will likely be carried forward to the future baseline, increasing future supply pressures. Indeed, two in five of more than 13,000 NHS doctors cited the longer-term impact on patient clinical demand as their top concern relating to the coronavirus pandemic.³⁴ There are fears that the lack of routine healthcare this year could cause a huge spike in demand in subsequent years. In a recent poll (August 2020), 26% of doctors said that in the last two weeks, non-COVID demand had increased to pre-pandemic levels, with 17% saying

²⁸ The Health Foundation (2019) Falling short: the NHS workforce challenge

²⁹ The Health Foundation (2020), COVID-19: Five dimensions of impact

³⁰ NHS, 2020, Estimated A&E attendance and emergency admissions timeseries by month

³¹ NHS, 2020, Appointments in General Practice August 2020

³² GP Online 2020, Doctors fear 'huge spike in demand' after COVID-19 pandemic

³³ In August 2020, 43% of appointments took place over the phone compared to 14% in February 2020. NHS, 2020, Appointments in General Practice August 2020

³⁴ GP Online 2020, Doctors fear 'huge spike in demand' after COVID-19 pandemic

that demand is now even higher than it was before.³⁵ There is a lack of data at more localised levels, but it is assumed that these national trends are applicable to the CIA.

- 7.3.61 Another important aspect of the health impacts associated with the pandemic, is the extent to which mental health issues have been affected. Comparative analysis on the state of mental health across several demographic groups, found that after factoring in pre-pandemic trends, severe mental health has deteriorated substantially (by 8.1% on average) as a result of the pandemic-induced lockdown.³⁶ For adults in the UK, specific issues that were cited as affecting well-being the most were uncertainty about the future (63%), anxiety/stress (56%), and boredom (49%).³⁷ The emergence of these findings has raised concerns on the widening of pre-existing inequalities in mental-health, and with that comes added concern over reduced access to mental health services. Reports show that almost half of psychiatrists have seen increases in urgent and emergency cases during lockdown, yet a similar proportion have seen a decrease in routine appointments.³⁸ Such avoidance has instilled fears that the post-pandemic period may see a sudden influx of untreated mental illness, particularly from new referrals who have also been growing in numbers.³⁹ Similar to the data on general healthcare provision, there is also a lack of mental health data at the local levels, but it is assumed that these national trends are applicable to the CIA.
- 7.3.62 Overall, the uncertainty surrounding the crisis means that all future outcomes with regard to healthcare provision are speculative and are therefore likely to change as the public health situation evolves and develops. It is likely that sensitivity will increase in the future as a result of the pandemic.

Effect of temporary construction on the temporary accommodation market

- 7.3.63 A number of the construction workforce are expected to be non-home based and will require temporary accommodation near to the site – usually in the form of tourism accommodation (serviced, non-serviced or campsites) or private housing. Information on the existing accommodation market in the CSA (considered to be the location that most non-home based workers will seek accommodation) has therefore been collected and is presented here. As well as existing capacity, availability and affordability of the accommodation options need to be considered.

Baseline

- 7.3.64 Table 7.3.24 summarises the estimated number of rooms in the CSA across various forms of accommodation which could be feasibly utilised by construction workers given existing occupancy rates and the construction worker budget. Appendix 7.8:

³⁵ British Medical Association, 2020, COVID-19: analysing the impact of coronavirus on doctors

³⁶ IFS, 2020, The mental health effects of the first two months of lockdown and social distancing during the Covid-19 pandemic in the UK.

³⁷ ONS, 2020, Coronavirus and the social impacts on Great Britain: 5 June 2020

³⁸ Royal College of Psychiatrists, (2020), Psychiatrists see alarming rise in patients needing urgent and emergency care and forecast a 'tsunami' of mental illness.

³⁹ NHS Providers, 2020, The Impact of Covid-19 on Mental Health Trusts in the NHS

Construction Workforce Accommodation Strategy (document reference 6.2.7.8) presents the detailed methodology and assumptions behind these estimates. Overall, there are estimated to be 5,400 available and affordable rooms within the CSA, the majority of which (86%) are in the Private Rented Sector. Consultation with Locate in Kent, Visit Kent, the local host authorities and EDC confirmed a constrained accommodation stock.

Table 7.3.24 Summary of accommodation stock in the CSA and those which are available and affordable for construction workers

	Total rooms	Availability	Affordability	Available and affordable
Tourism	3,000	*	*	75
Private rented sector (PRS)	57,400	8%	100%	4,600
Owner occupied sector (OOS)	108,000	1%	50%	700
Total	168,700	-	-	5,400

Sources: Visit Kent, 2019, *Accommodation Audit*; Visit Britain, 2016, *Accommodation Stock Audit*; airdna.co.uk, 2020; ONS, *Subnational dwelling stock by tenure estimates, 2018*. Volterra calculations. Appendix 7.8: *Construction Workforce Accommodation Strategy* (document reference 6.2.7.8) contains a thorough description and basis for all assumptions made and sources used. Note * indicates different availability and affordability metrics were applied to different types of tourism accommodation – Appendix 7.8: *Construction Workforce Accommodation Strategy* (document reference 6.2.7.8) provides details of the metrics used and the basis for them.

Future baseline – temporary accommodation market

- 7.3.65 The EDC Implementation Framework⁴⁰ outlines a maximum consent of 11,000 sqm at Eastern Quarry (along the bottom of the CIA). Area masterplans for all the villages in Eastern Quarry have now been approved and present no hotel floorspace allocation in Ashmere and 11,000 maximum consent in Alkerden. However, based on consultation with EDC, it is unlikely that significant provision will be brought forward. The framework also presents a maximum consent of 5,000 sqm at Northfleet Embankment West. There is also 147,000 sqm across an (undefined) split of retail, hotels and leisure in Ebbsfleet Central. Consultation with Locate in Kent identified a number of pipeline hotels, including a 60 room one in Gravesend.
- 7.3.66 Considerable housing growth is planned in the CSA, some of which will be delivered before the construction of the London Resort. A proportion of this new housing might reasonably be assumed to be available and affordable either as OOS or PRS options for construction workers. Similarly, the rise in popularity of short-term, home lettings (such as Airbnb), coupled with the rise in dwelling stock might feasibly mean that more properties or rooms are available via this route.
- 7.3.67 All of these would contribute towards increased temporary accommodation available

⁴⁰ Ebbsfleet Development Corporation, *Ebbsfleet Implementation Framework*, 2017

in the future baseline, across all types. However, in order to be conservative, none of this is assumed to occur nor relied upon. This assessment therefore assesses effects against the current baseline levels.

7.3.68 Table 7.3.25 below presents the estimated demand for temporary accommodation from cumulative schemes in the area. Scheme specific information is used where possible. Only two schemes (Lower Thames Crossing and A2 Bean) provided information regarding their estimated non-home based workforce. For the other schemes, the CITB UK standard of 5% of peak⁴¹ was conservatively doubled and then assumed to apply. Overall cumulative schemes in the area are expected to generate 630 workers in 2023 and 210 in 2028 which might be requiring some form of temporary accommodation.

Table 7.3.25 Cumulative schemes non-home based workforce

Cumulative scheme (with construction period overlapping with that of the London Resort)	Construction period	Relevant LR peak(s)	Application information regarding construction workforce and non-home based	Estimated annual workforce requirement (and description of conversion assumptions where required)	Estimated annual workforce that are non-home based and requiring some form of temporary accommodation
Lower Thames Crossing	2021-2027	2023	900 (peak workforce), 125 non home based	900 (use peak in absence of more information)	125
Riverside Energy Park, by Cory Riverside Energy	2021-2024	2023	1,097 (peak workforce per month)	1,097 (use peak per month in absence of more information)	110
Eastern Quarry, Swanscombe by Barton Wilmore.	2007-2025	2023	1,150 (FTEs over whole period)	639 (Use standard assumption that 1 FTE = 10 job years to get total job years, then average for 18 year construction period)	96
A2 Bean and Ebbsfleet Junction Improvements by Highways England.	2020-2022/3	2023	100 (peak workforce), 0 non home based	100 (use peak in absence of more information)	0
Stone Lodge Complex by BAM Construction.	2018-2023	2023	*	*	*
Northfleet Embankment, by	2017-2024	2023	143 (FTEs per month)	204 (Assume per month FTE = per year)	31

⁴¹ Where peak information was not available (for six schemes), the average on-site per year was factored by 1.5, which is an average ratio of peak:average from other projects.

Keepmoat Homes Ltd.				FTE. Use standard assumption that 1 FTE = 10 job years to get total job years, then average for 7 year construction period)	
Land East Of Caspian Way	2018-2034	2023 2028	1,250 (workers per annum)	1,250	188
C.Ro Ports London Ltd Purfleet Thames Terminal	2017-2022	2023 (worst case)	*	*	*
Thames Enterprise Park The Manorway Coryton Essex	2018-2031	2023 2028	201 (FTEs over whole period)	155 (Use standard assumption that 1 FTE = 10 job years to get total job years, then average for 13 year construction period)	23
Langdon Hills Golf And Country Club	2020-2023	2023	335 (job years per annum)	355	50
Outline application for a mixed development and comprising: up to 532 Homes, up to 46,000 sq. m Employment Floorspace and a Mixed Use Neighbourhood Centre	2017-2027	2023	1,600 (job years) with 'high local' proportion	80 (average per year over 10 years of construction)	12

Displacement/loss of business and other services

7.3.69 The London Resort will result in the displacement of businesses and services from the PSB, which may be able to relocate or may be lost. Baseline information on these existing businesses is presented here. Limited detailed information is known at this time about the exact employment supported by the current uses on site and so estimates are made, which are described in this section.

Baseline

Estimating businesses located within the PSB

7.3.70 The methodological approach undertaken in this assessment aims to identify current

occupiers on an individual level by cross-referencing VOA commercial addresses with other supplementary commercial databases. This has been done to gain a more detailed understanding of the sectors that these businesses operate in, hence gauging a stronger idea of the services that they provide to the local and wider community.

7.3.71 The employment supported within the PSB has been estimated based on the following methodology:

- The primary source of data has been extracted from the Valuation Office Agency (VOA). This dataset provides a comprehensive list of non-domestic business premises across the UK, which have been narrowed down to include only those contained within the PSB.
- After compiling a narrowed down list of premises within the PSB, the next step involves determining whether the property is occupied or vacant. This has been done by manually cross referencing and comparing the addresses provided in the main VOA dataset, with addresses provided in the following supplementary datasets/sources:
 - Peninsula Management Group (PMG)
 - Addressbase Premium
 - Companies House
 - Google Maps; and
 - Information requests by land referencing company LRS on behalf of LRCH
- The final list of occupiers is then used to estimate the total number of FTEs supported within these businesses. Employment is estimated by dividing the total floorspace area by the employment density. Employment densities are assigned based on the primary description given by the VOA which indicates whether the floorspace is utilised for lighter uses such as office-related operations, or heavier uses such as industrial-type operations. Additionally, other summary statistics on existing occupiers have been estimated, including average firm size, average rateable value and sectoral breakdown.
- Furthermore, firms that engage in activities that can be classed as ‘bad neighbour uses’ have also been identified. These typically include businesses that are quite disruptive to residents who may live nearby, particularly in terms of their impact on visual quality, as well as noise and air pollution.

7.3.72 Table 7.3.26 summarises the total commercial floorspace by use type within the PSB. Commercial floorspace at Ebbsfleet International station has been removed as employment at the station would not be displaced as a result of the London Resort. While that is the case, it is difficult to adjust the employment estimate for the station without knowing the exact split of employment uses there. It should therefore be noted that the employment estimate may overstate on-site jobs by including those related to Ebbsfleet station. This is also true for other parts of the PSB where land uses are potentially included within the estimates presented here but the uses themselves

would not be displaced.

Table 7.3.26 Floorspace within the PSB

Use type	Floorspace (NIA, m ²)			Vacancy rate
	Occupied	Vacant	Total	
Retail, store or showroom	700	100	800	13%
Industrial / manufacturing	8,200	2,800	11,000	25%
Light industrial	5,500	1,900	7,400	26%
Storage	33,700	14,800	48,600	31%
Offices	1,300	0	1,300	1%
Total	49,400	19,700	69,100	28%

NB. figures may not sum due to rounding

Sources: Valuation Office Agency; Employment Densities Guide

7.3.73 There is a total of approx. 69,100m² (NIA) of floorspace within the PSB (as detailed in Table 7.3.1, this is the order limits of the London Resort – the Project Site – which includes land on both the Kent and Essex sides of the Thames), of which 28% is deemed vacant. Typical employment densities are then applied to each use type. For example, there is typically between 8m² and 13m² of floorspace for every office-based FTE employee,⁴² meaning that 1,500m² of NIA office floorspace might support between 115-190 employees. The typical densities used are in line with the Employment Densities Guide. It should be noted that applying densities to each use type is inexact as densities can vary significantly within each use class. Whilst a range of possible values have initially been estimated, the analysis here utilises the lower-bound estimates as these align more accurately with the range of estimates provided by Bramwell Associates. As part of the land referencing process, occupiers were asked to complete Request for Information forms (RFIs) which included asking about employment levels in each business. Very few answers were provided to this, but wherever they were, those reported figures have been used instead of making estimates. In most cases where a business did report an employment level, it was largely in line with Volterra's original estimates based on typical job densities, suggesting that many firms on-site are operating at standard employment densities. This suggests that Volterra's overall job estimates are likely to be a sufficiently representative estimate of the jobs supported onsite.

7.3.74 Table 7.3.27 shows that at present, 94 businesses have been identified, supporting a total of 1,040 FTEs, equivalent to 1,160 jobs once part-time jobs are accounted for.⁴³ This estimate is comparable with the estimated range of employees provided to the Planning Inspectorate by Bramwell Associates (who represent owners and businesses likely affected) in June 2020 of between 1,000 and 1,500 employees. At the firm level,

⁴² Homes and Community Agency (2015), Employment Densities Guid typically e

⁴³ 99.7% of the existing jobs are located at the Kent Project Site, with the few remaining jobs located at the Essex Project Site.

it is estimated that the average firm supports approximately 12 jobs, which indicates that an overwhelming majority of occupiers are small-sized firms. Of the 94 identified businesses, 32 have been classed as ‘bad neighbour uses’, equivalent to 41% of total occupied floorspace. These uses include heavy industrial functions such as concrete manufacturers, demolition services, metal scrap collectors, vehicle repair centres, and large-scale industrial recycling plants.

Table 7.3.27 Displaced businesses within the PSB

Existing occupier statistics		Value	
No. of firms within PSB		94	
Total FTEs		1,040	
Total Jobs		1,160	
Average firm size		12 jobs per firm	
Average rateable value		£23,400	
Bad neighbour uses	Metric	Central scenario	Worst-case scenario
	Floorspace (NIA)	20,700 m ² (41%)	27,200 m ² (54%)
	No. of firms	32 (34%)	46 (49%)
	No. of Jobs	400 (34%)	600 (52%)

Sources: VOA, 2020; Ordnance Survey, 2020; Addressbase Premium, 2020; Google Maps; Volterra calculations

7.3.75 Table 7.3.28 provides a business size breakdown of all the firms within the PSB based on the number of employees they support. Small firms (0-49 employees) make up approximately 94% of all the current occupiers, with the remaining 6% being classed as medium sized (50 – 249 employees). Notably, there are no large employers currently operating within the PSB. These estimates relate to the numbers of staff likely to be operating from each business entity on the site. In the instance of some firms which are part of larger chains, this only represents the employment supported on the site and therefore at risk of displacement, and not any employment supported elsewhere across the country by the same business operating from other sites.

Table 7.3.28 Business size (by no. of employees)

Firm size	Count	%	
Small (0 – 49 employees)	Micro (0 – 9)	59	63%
	Small (10 – 49)	29	31%
Medium (50 – 249 employees)	6	6%	
Large (+250 employees)	0	0%	

Sources: VOA, 2020; Ordnance Survey, 2020; Addressbase Premium, 2020; Google Maps; Volterra calculations

Table 7.3.29 Sectoral breakdown of current occupiers

Sector name	No. of jobs	%
Wholesale and retail trade; repair of motor vehicles and motorcycles	360	31%
Construction	225	19%
Manufacturing	218	19%
Transportation and storage	132	11%
Industrial based sectors - sub-total	935	80%
Administrative and support service activities	94	8%
Real estate activities	31	3%
Accommodation and food service activities	22	2%
Agriculture, forestry and fishing	20	2%
Professional, scientific and technical activities	16	1%
Human health and social work activities	10	1%
Information and communication	9	1%
Public administration and defence; compulsory social security	9	1%
Water supply; sewerage, waste management and remediation activities	8	1%
Arts, entertainment and recreation	4	0%
Electricity, gas, steam and air conditioning supply	2	0%
Education	1	0%
Financial and insurance activities	0	0%
Other service activities	0	0%
Activities of households as employers; undifferentiated goods-and services-producing activities of households for own use	0	0%
Activities of extraterritorial organisations and bodies	0	0%
Other sectors - sub-total	227	20%

7.3.76 A sectoral breakdown of the occupiers within the PSB (Table 7.3.29) shows that 80% of all the jobs supported by these firms are in industrial-based sectors. The most prominent sectors include wholesale retail trade/repair of motor vehicles⁴⁴ (31%), construction (19%), manufacturing (19%), and transportation & storage (11%). Many of these firms are located across several industrial estates/business parks that are within the PSB, namely the Northfleet Industrial Estate, Kent Kraft Industrial Estate, Galley Hill Industrial Estate and Manor Way Business Park.

Future baseline - businesses

7.3.77 The estimates of current workforce within the PSB are viewed likely to be conservative in terms of job numbers which might be displaced. All users within the red line are aware of the status of the project. It is therefore viewed unlikely that any additional

⁴⁴ Information on the sectoral breakdown of occupiers is based on the SIC (Standard Industrial Classification) codes that have been assigned to each business. The SIC codes utilized in this analysis (due to limited data availability) provide a 'sectional' breakdown of employment, meaning that some sectors may be grouped together into broader industrial categories.

workforce over and above the existing baseline estimated could be supported by the present uses, and so the future baseline position is assumed to remain the same as the current baseline. The effects are therefore assessed against the current baseline levels.

- 7.3.78 The EDC Implementation Framework outlines, for the six existing development proposals with consent, that there is maximum consent for over 600,000 sqm of office floorspace. Of this, 120,000 sqm is at Eastern Quarry (along the bottom of the CIA) and 450,000 sqm is in Ebbsfleet Central (in the centre of the CIA). In Northfleet Embankment West, 46,000 sqm is allocated to B1 (office), B2 & B8 (industrial). In Northfleet Embankment East, 87,550 is allocated across B1, B2 & B8. In terms of retail space, there is expected to be a maximum of 28,000 sqm delivered across five of the six proposals (26,000 sqm at Eastern Quarry) and 147,000 sqm across an (undefined) split of retail, hotels and leisure in Ebbsfleet Central.⁴⁵
- 7.3.79 In the future baseline it is therefore likely that in terms of quantum, the new floorspace delivered will more than offset the 69,100m² (NIA) of floorspace (72% of which is occupied, and 28% vacant) within the PSB which is lost as a direct result of the London Resort. However it is known that some of the uses currently on the site are bespoke to the location (some are known as ‘bad neighbour’ uses), and therefore in order to appropriately assess the loss of floorspace as a result on the London Resort, the loss of the 69,100m² (NIA) of floorspace within the PSB is considered.
- 7.3.80 There are only two cumulative schemes in the PSB: the A2 Bean and Ebbsfleet Junction Improvements by Highways England; and the mixed use development (phase 3 – 172 residential dwellings) of land west of Springhead Road in Northfleet. Neither of these schemes include the removal or provision of businesses. This means that cumulative schemes will not affect the future businesses baseline at the PSB level in 2022.

COVID-19

- 7.3.81 Initial efforts to curb the COVID-19 pandemic through the implementation of lockdown measures, directly resulted in a sharp decline in business activity across the economy.⁴⁶ Many businesses have consequently been forced to place workers on furlough or, more drastically, make workers redundant in order to sustain their operations. Small businesses in particular have suffered extensively during this crisis as their revenues have declined substantially, with many voicing concerns on defaulting on loans, retaining employees and sustaining supply chains.⁴⁷ A significant proportion of the businesses situated within the PSB are small businesses, and therefore may be experiencing similar issues. With several relief packages on offer from the central government to businesses, it remains to be seen whether this financial assistance will be able to help small businesses avoid permanent damage by sustaining them in the medium/long-term, especially if further lockdown restrictions are reintroduced to prevent or mitigate a potential second wave of infections. The widespread uncertainty

⁴⁵ Ebbsfleet Development Corporation, Ebbsfleet Implementation Framework, 2017

⁴⁶ ONS (2020), Coronavirus and the impact on output in the UK economy: July 2020

⁴⁷ McKinsey (2020), How the COVID-19 crisis is affecting UK small and medium-size enterprises

surrounding the future evolution of this health crisis from an economic standpoint, means that it cannot be definitively stated whether the COVID-19 crisis will adversely affect the businesses identified within the PSB and the extent to which these adverse effects occur.

Displacement/loss of community uses

7.3.82 The London Resort will result in the displacement or disruption (potentially indirectly through other effects) of some community uses. Baseline information on these existing community uses is presented here.

Community facilities within the PSB and CIA

Community uses

7.3.83 This section uses a variety of sources to identify any potential community facilities located within the PSB and then more widely within the CIA. 7.3.89 shows a breakdown of the facilities within the PSB and CIA by type. Their locations across the PSB and CIA are also shown in Diagram 7.3.5.

7.3.84 The analysis conducted in this section is mainly based on Addressbase data, which identified the possibility of three community serving facilities/businesses being located within the PSB. These include a public convenience facility, Essandor Sports & Social Club, and a rifle range.

7.3.85 The group of ‘community uses’ that have been identified in this analysis encompasses community services/facilities that are both non-commercial and commercial in nature. According to the Addressbase technical specification, the group of non-commercial community uses includes entities such as youth clubs, day care centres, community centre halls, public convenience, religious halls, etc. Commercially-driven services include entities like the post office, supermarkets, chemists, opticians, showrooms, markets, bars, restaurants, etc.

7.3.86 Essandor Sports & Social Club (community service) and the rifle range (sports facility) were classed within Addressbase as historical entries. Further inspection of these two facilities has been unable to provide any active evidence of these facilities or to verify their existence. However, some businesses identified as historical entities were subsequently located and verified to be in current operation. Therefore, these two potential community serving businesses were initially considered in the baseline assessment in order to be complete and conservative in our assessment of potential displacement. The assessment has since been updated with formal land referencing and these two sports facilities are not included in the full list of businesses operating within the PSB. For this reason, it is now assumed with more certainty that these facilities are not in operation and therefore the impact of their hypothetical displacement upon communities is not assessed.

7.3.87 Table 7.3.30 provides further information on the remaining community asset (the

public convenience facility) that was identified in the updated analysis.

Table 7.3.30 Community uses within the PSB

Name of Community Asset	Category	Description of the facility/service provided
Public convenience facility	Community service	Free or paid access in publicly accessible places such as a street, shopping mall, or Bus/Rail Station. E.g. public toilets.

Source: Addressbase Premium, 2020

7.3.88 Some 76 potential community facilities have been identified across the CIA; 39 of these are community serving businesses, 17 are community services, 13 are places of worship, 6 are sports facilities, and there is also one library.

7.3.89 Community serving businesses can include: post office, market (indoor/outdoor), public house/bar/nightclub, restaurant/cafeteria, shop, and other licensed premise vendors. Community services are defined as any facility that can be classed as a public/village hall, public convenience centre, church hall/religious meeting place, and community service centre/office.

7.3.90 Additionally, four community services which technically lie outside the CIA boundary (by fine margins) have also been identified, although not included in the final stock of current provision.

Table 7.3.31 Current provision of community facilities

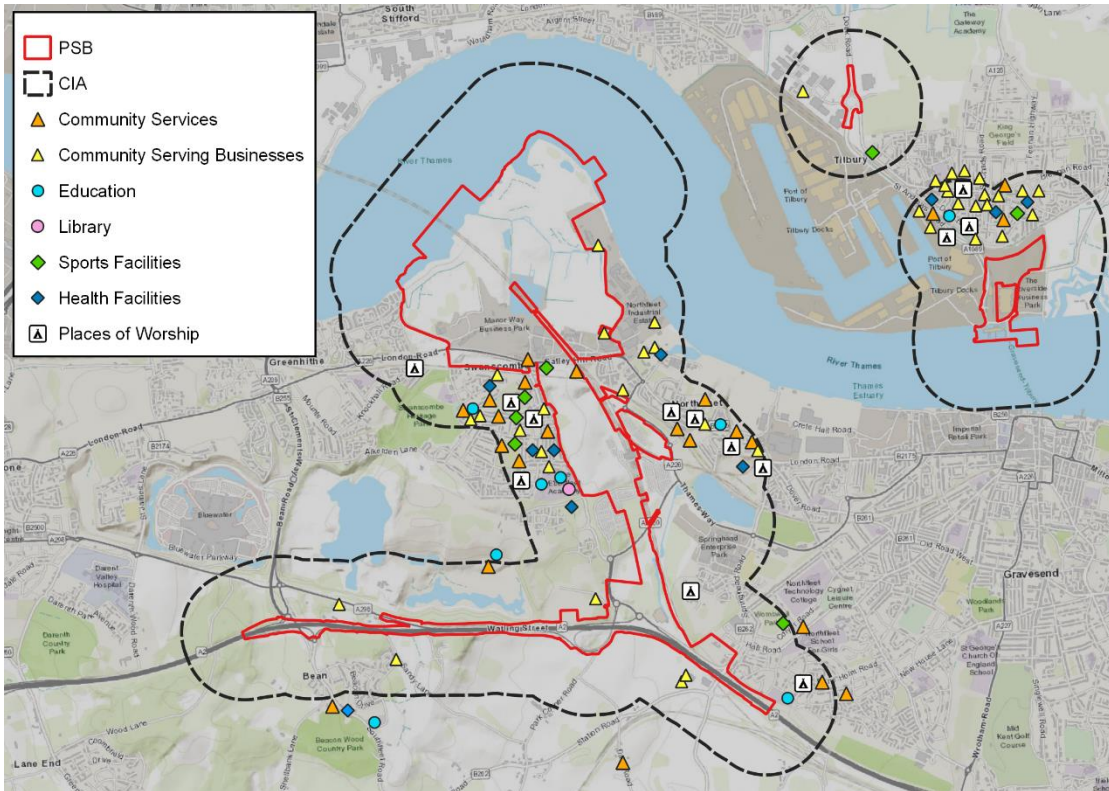
Type	No. of community facilities/services provided	
	CIA	PSB
Community Services ⁴⁸	17	2
Community Serving Businesses ⁴⁹	39	0
Places of Worship	13	0
Library	1	0
Sports Facilities	6	1
Total	76	3

Sources: Ordnance Survey, 2020; Addressbase Premium, 2020; Google Maps; Volterra calculations

⁴⁸ Community Services have been defined as any facility that can be classed as a public/village hall, public convenience centre, church hall/religious meeting place, and community service centre/office.

⁴⁹ Community Serving Businesses includes the following entities – post office, market (indoor/outdoor), public house/bar/nightclub, restaurant/cafeteria, shop, and other licensed premise vendor.

Diagram 7.3.5 Community facilities / services within the PSB and CIA



*note: Essandor Sports & Social Club and the rifle range have not been assessed in terms of their displacement as they are assumed to not be in operation. They have however, been included in the diagram above to provide spatial context on their location.

Sources: Ordnance Survey, 2020; Addressbase Premium, 2020; Google Maps

7.3.91 Research suggests that it is best practice for one community centre to be provided for every 7,000 – 11,000 people residing in a community.⁵⁰ Earlier research by the same authors suggested that the catchment population required to sustain one community centre, in terms of viability, is approximately 4,000 people.⁵¹ Within the CIA there are eight public / village halls or other community facilities (which are contained within the 'community services' category), and the area has a population of 69,500; this means that there is a community centre per approximately 8,700 residents in the area, within the optimum range indicated by research for both financial viability and best practice.

7.3.92 The CIA is within the 5th decile (where 1st is the most deprived) on the IMD's barriers to access to housing and services subdomain, indicating that the area has average levels of access to public services.⁵² Data indicates that problems are more likely to be associated with homelessness and housing affordability, rather than access to services

⁵⁰ Barton, Grant and Guise, 2010, Shaping neighbourhoods for local health and global sustainability

⁵¹ Barton, Grant and Guise, 2003, Shaping Neighbourhoods: A Guide for Health, Sustainability and Vitality

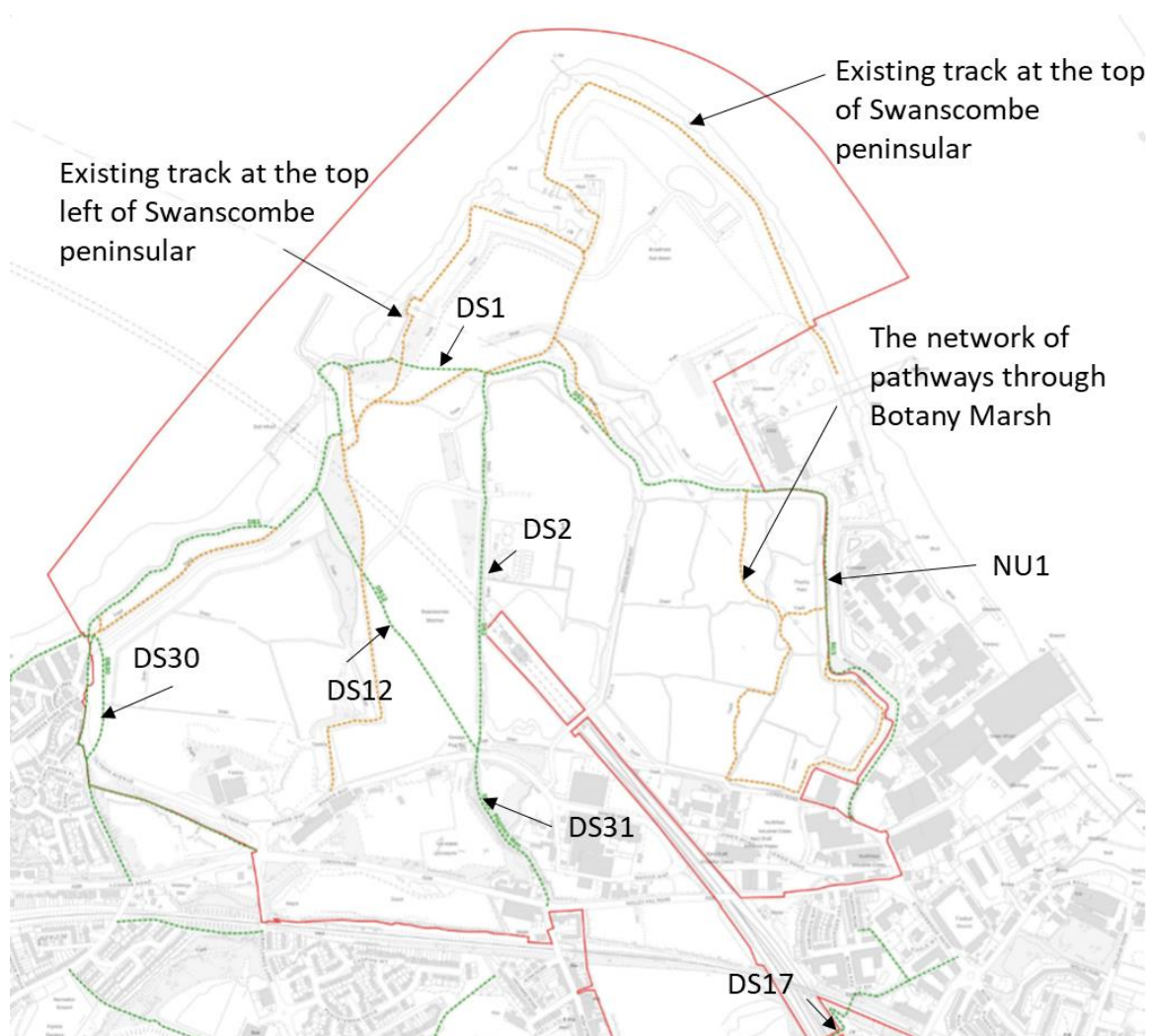
⁵² MHCLG, 2019, English Index of Multiple Deprivation

(refer to housing baseline below).

PRoWs and routes

7.3.93 The PRoW and route assessment⁵³ finds that there are ten PRoWs and routes that will be affected by the London Resort. All remaining PRoW and routes that are not discussed in this baseline are retained through both the construction and operation phase and are not considered to face significant impacts as a result of the London Resort.

Diagram 7.3.6 PRoW and routes in the PSB directly affected by the London Resort

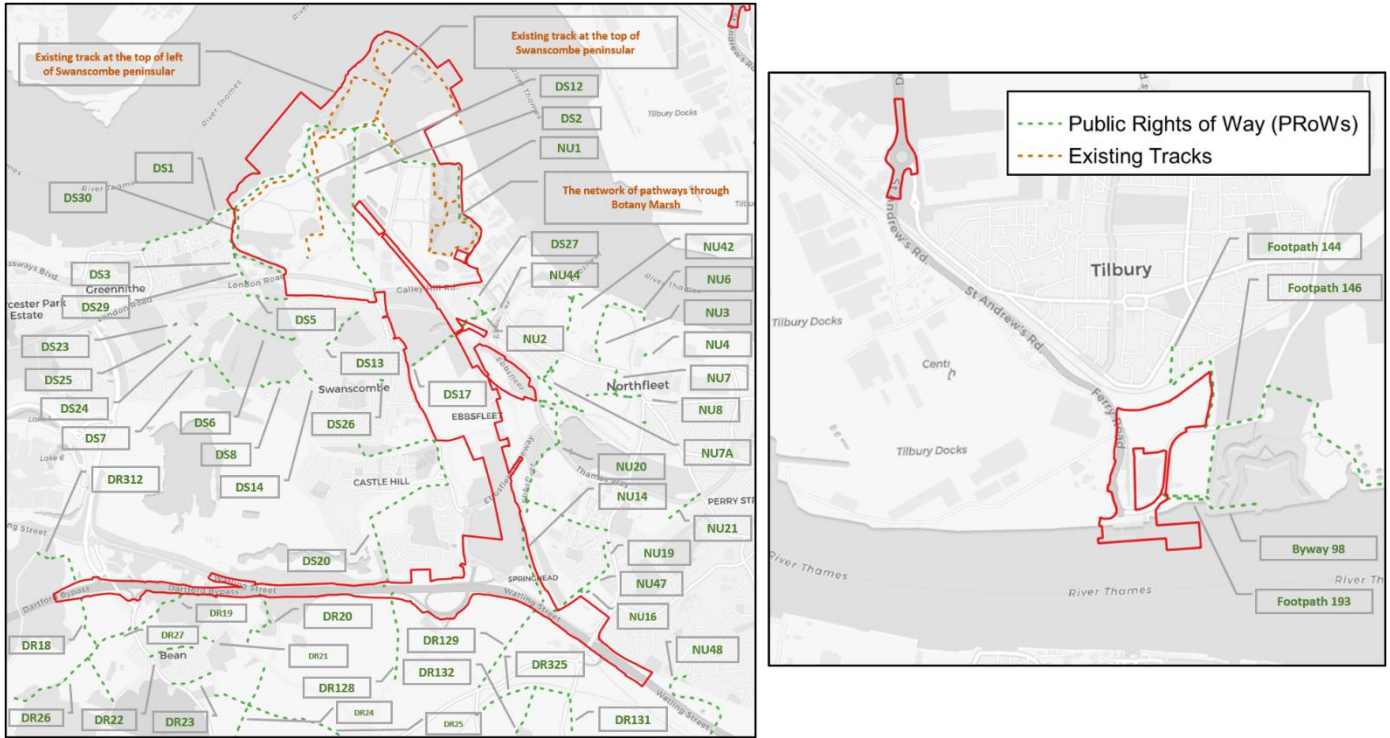


Source: EDP

⁵³ This is informed by an PRoW and routes assessment by EDP. The assessment deals only with those routes affected on the Peninsula. All remaining rights of way that are not discussed in this baseline are assumed to be retained through both the construction and operation phase and are not considered to face significant impacts as a result of the London Resort.

7.3.94 There are further PROWs and routes within the CIA (Diagram 7.3.7) which might be indirectly affected by the London Resort.

Diagram 7.3.7 PROWs and routes within the CIA the potential to be indirectly affected



Open space

7.3.95 The baseline found 41 open spaces within the CIA as shown in Table 7.3.32. Open space has not been identified within the PSB.

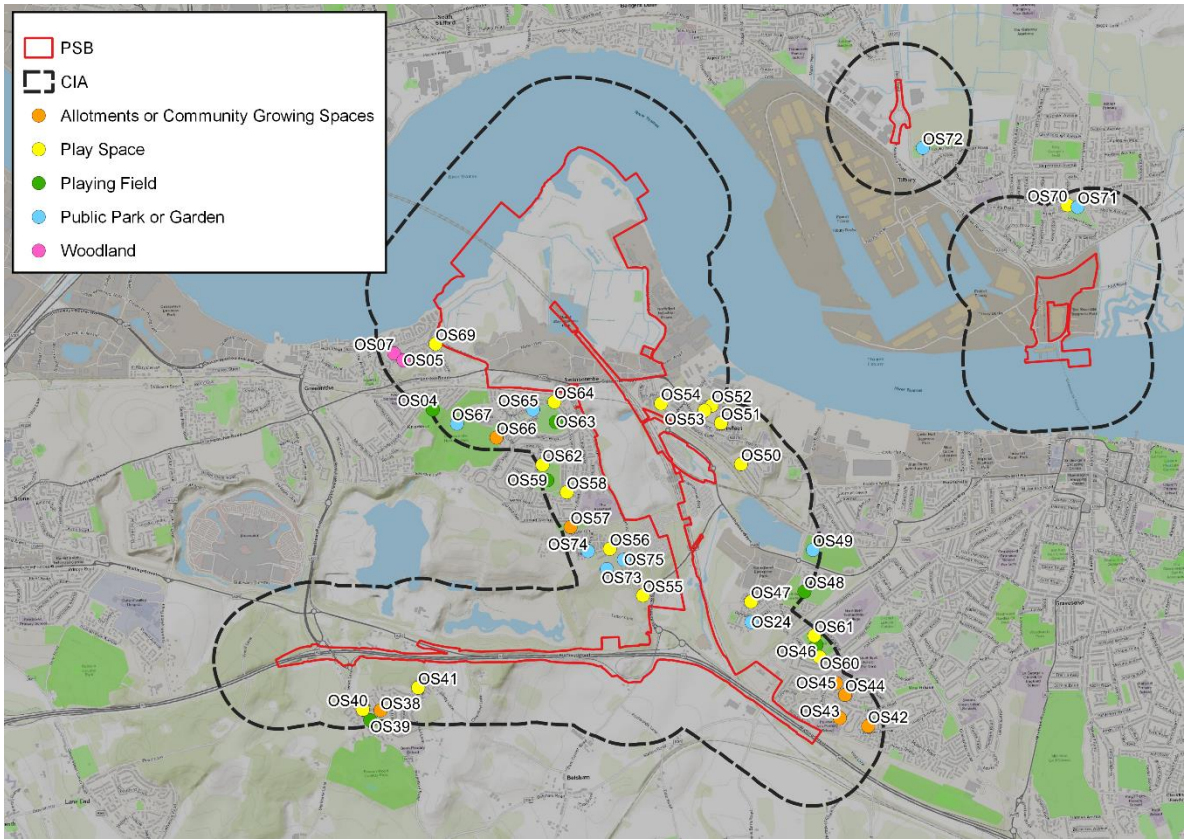
7.3.96 It should be noted that this open space definition does not include the three marshes which overlap with the PSB, which are discussed later on in this section. The 41 open spaces that have been identified are summarised in Table 7.3.32 , and also illustrated in Diagram 7.3.8.

Table 7.3.32 Open spaces within the PSB and CIA

ID	Name	Type of Open Space
OS04	Knockhall Recreational Ground	Playing Field
OS05	Ingress Abbey Lawns and Boulevard	Woodland
OS07	R/O Ingress Abbey	Woodland
OS24	Penn Green	Public Park or Garden
OS38	n/a	Allotments or Community Growing Spaces
OS39	n/a	Playing Field
OS40	n/a	Play Space

ID	Name	Type of Open Space
OS41	n/a	Play Space
OS42	n/a	Allotments or Community Growing Spaces
OS43	n/a	Allotments or Community Growing Spaces
OS44	n/a	Allotments or Community Growing Spaces
OS45	n/a	Allotments or Community Growing Spaces
OS46	Wombwell Park	Playing Field
OS47	n/a	Play Space
OS48	n/a	Playing Field
OS49	Northfleet Urban Country Park	Public Park or Garden
OS50	n/a	Play Space
OS51	n/a	Play Space
OS52	n/a	Play Space
OS53	n/a	Play Space
OS54	n/a	Play Space
OS55	n/a	Play Space
OS56	n/a	Play Space
OS57	n/a	Allotments or Community Growing Spaces
OS58	n/a	Play Space
OS59	Swanscombe Park	Playing Field
OS60	n/a	Play Space
OS61	n/a	Play Space
OS62	Swanscombe Park Playground	Play Space
OS63	Broomfield Park	Playing Field
OS64	Broomfield Park Playground	Play Space
OS65	Broomfield Park	Public Park or Garden
OS66	n/a	Allotments or Community Growing Spaces
OS67	Swanscombe Heritage Park	Public Park or Garden
OS69	n/a	Play Space
OS70	n/a	Play Space
OS71	Anchor Fields Park	Public Park or Garden
OS72	n/a	Public Park or Garden
OS73	Castle Hill Garden City Park	Public Park or Garden
OS74	Limes Green	Public Park or Garden
OS75	Ebbfleet Green	Public Park or Garden

Diagram 7.3.8 Open space within the PSB and CIA



Contains Ordnance Survey data © Crown copyright and database right 2019
 Sources: OS Open Greenspace; Google Maps

Marshes

7.3.97 In addition to the open spaces identified, there are three marshes which overlap with the PSB. These are: Black Duck Marsh, Botany Marshes and Broadness Salt Marsh.

Future baseline – community uses

7.3.98 The EDC Implementation Framework outlines, for the six existing development proposals with consent, that there is maximum consent for approximately 70,000 sqm of community floorspace. Of this, 50,000 sqm is at Eastern Quarry (along the bottom of the CIA) and 21,000 sqm is in Ebbsfleet Central (in the centre of the CIA).⁵⁴

7.3.99 Diagram 7.3.4 outlines the EDC Framework ambition for future social infrastructure uses (schools, community centres, youth centres, libraries, sports pitches, sports centres and healthcare provision), many of which will fall within the CIA.

⁵⁴ Ebbsfleet Development Corporation, Ebbsfleet Implementation Framework, 2017

7.3.100 Table 7.3.33 provides a summary of the single cumulative scheme in the PSB and the additional 10 cumulative schemes in CIA that have been identified as having a potential impact on the future provision of community uses, PRowS and open space within the relevant study areas.

Table 7.3.33 Cumulative schemes and community uses, PRowS and open space.

Cumulative scheme	Type of facilities/services provided	Description
PSB		
Land West of Springhead Road (Northfleet)	<ul style="list-style-type: none"> • Communal facility • Educational • Health • PRow network • Open space 	Provision of a 2FE primary school – facilities for hire at the school. Financial contribution to the provision of new health facilities. Strategic PRow network complemented by new open space provision.
CIA		
Eastern Quarry	<ul style="list-style-type: none"> • Communal facility • Educational • Health • Emergency 	Neighbourhood facilities, emergency services, health services, educational and recreational facilities.
The Pier (Greenhithe)	<ul style="list-style-type: none"> • Communal facility 	Public space enhancements with community development through a new neighbourhood centre.
Northfleet Embankment	<ul style="list-style-type: none"> • Communal facility • Education • Open space 	2FE primary school, community facilities and 1.2ha of public open space.
Land at Coldharbour Road (Northfleet)	<ul style="list-style-type: none"> • PRow network • Open space • Play space 	Formal play space for children (1 LEAP and 2 LAPs) ⁵⁵ Significant areas of green space, including footpaths and cycle paths.
Chadfields (Tilbury)	<ul style="list-style-type: none"> • Communal facility 	New clubhouse will provide community facilities.
Land West of Lytton Road (Chadwell St Mary)	<ul style="list-style-type: none"> • PRow network • Open space 	New strategic green link from Tilbury marshes to the centre of Chadwell St Mary. Improvements to cycle routes, S106 contribution to improve open space.
Star Industrial Estate (Chadwell St Mary)	<ul style="list-style-type: none"> • PRow network • Open space 	Redevelopment of public open space. New PRowS (footpaths in particular) are also included.
Land Part of Little Thurrock Marshes (Grays)	<ul style="list-style-type: none"> • PRow network • Open space 	Provision of a significant area of green, public open space together with smaller pockets of

⁵⁵ LAP refers to a Local Area of Play, whilst LEAP is a Local Equipped Area for Play.

Cumulative scheme	Type of facilities/services provided	Description
		open space. New foot/cycle links also proposed.
Land at Former Northfleet Cement Works	<ul style="list-style-type: none"> • Communal facility • Open space • Recreational 	Proposals include a 180m ² community centre, and open spaces including a sports playing field, play areas and wildlife corridors.
Former Croxton And Garry Site Tiltman Avenue (Swanscombe)	<ul style="list-style-type: none"> • PRow network • Open space 	New footpath and cycling routes will be provided. New open space (34% of total site area) will be available to the public and private residents.

7.3.101 Diagram 7.3.9 and Diagram 7.3.10 display the EDC Framework ambition for the garden grid and major parks, respectively. According to the framework, the focus is on delivering an integrated blue and green network, connecting the city’s parks and open spaces into a unified network which allows residents to travel across the city within green corridors.

7.3.102 The framework also outlines ambitions for seven city parks to be developed from existing open spaces within Gravesham and Dartford areas, providing areas for sports, play and informal recreation, as well as long distance views and ecological enhancement.

7.3.103 Finally, it is the ambition of the EDG that Swanscombe Peninsula Park, currently made of three marshes (Botany Marsh, Black Duck Marsh and Broadness Marsh), will be consolidated into one coherent ecological reserve.

Diagram 7.3.9 Garden grid



Source: EDC, Ebbsfleet Implementation Framework, 2017

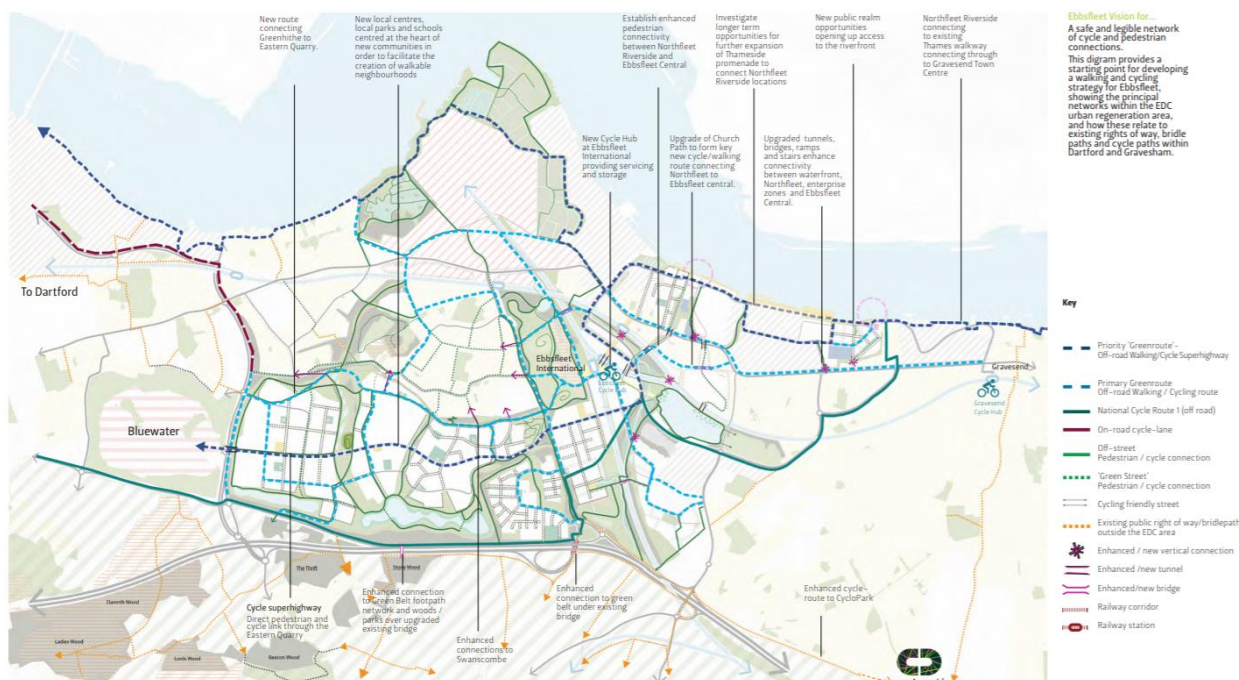
Diagram 7.3.10 Major parks



Source: EDC, Ebbsfleet Implementation Framework, 2017

7.3.104 Diagram 7.3.11 displays the EDC Framework ambition for cycle and pedestrian connections and routes. The Framework notes that the area is currently strategically well connected but locally inaccessible, reducing the ability to travel between communities. Tied with the green grid framework, the plan therefore aims to address the severance by upgrading and redeveloping existing routes.

Diagram 7.3.11 Cycle and pedestrian connections



Displacement of residential dwellings within the PSB as a result of property acquisition

7.3.105 The construction of the London Resort will result in the displacement of some residents from their home. This effect is assessed at the local (Dartford) housing market level.

Baseline – Dartford housing market

7.3.106 In 2019, there were 47,300 dwellings within Dartford, 87% of which were in the private sector.⁵⁶ The ONS estimate that, of these 87%, 74% are owner occupied (compared to 63% in England) and 13% are in the PRS (compared to 20% in England).⁵⁷ MHCLG also note that 9% of dwellings in Dartford are local authority owned, higher than 7% across England. By contrast only 4% are private registered providers, compared to 10% in England. According to MHCLG, there were 1,100 vacant dwellings in Dartford in 2018,

⁵⁶ MHCLG, Live tables on dwelling stock (including vacants), Table 100 Dwelling stock: Number of Dwellings by Tenure and district: England; 2019

⁵⁷ These research outputs are not official statistics on dwelling stock by tenure.

equivalent to 2.2% of the total stock; slightly lower than England (2.7%).⁵⁸

- 7.3.107 The median house price in Dartford was £311,000 in 2019, far higher than the CSA (£296,200) and England (£240,000). The affordability ratio was 9.3 in Dartford in 2019, meaning that a Dartford resident on a median wage would need just over nine years' worth of income to afford a house. This is slightly higher than the CSA (9.1) and England (7.8) ratios.⁵⁹
- 7.3.108 When considering PRS affordability, median rents in Dartford were £950 per month (all bedroom types), higher than the England average (£695). Comparing gross monthly income to PRS rents, rents in Dartford accounted for 33% of these monthly earnings; higher than England (27%) and higher the benchmark 30% considered affordable.⁶⁰ This aligns with consultation feedback from Dartford Borough Council who note that whilst the borough meets its local housing need requirement, much of the new housing is being taken up by people moving out of London and is not affordable to many local residents.
- 7.3.109 In terms of housing need, Dartford has 0.27 rough sleepers per 1,000 households; slightly higher than England (0.24). The borough also has 2.20 being accepted as homeless per 1,000 households which is higher than England (2.03). Finally, Dartford has 1.18 in temporary accommodation per 1,000 households, which is lower than England (2.22).⁶¹
- 7.3.110 A more detailed description of the CSA housing market is provided in paragraphs 7.3.194 to 7.3.209.

Future baseline – Dartford housing market

- 7.3.111 In terms of future housing need, the Dartford five year housing supply (2019 – 2024) identified a requirement for 4,184 additional dwellings within the borough: an average of 837 per year. If all were delivered at this rate, by 2022 Dartford could have added 2,510 additional dwellings by 2022. The borough identified 4,718 deliverable dwellings over the five year period, equating to 113% of the requirement. Of these 4,718, 3,674 dwellings are forecast at sites that have already commenced.⁶² This gives an indication that a large proportion will have been delivered by 2022.

Potential temporary or permanent disruption to housing delivery as a result of the land take and construction works

- 7.3.112 The London Resort includes the construction of a multi storey car park and the London

⁵⁸ MHCLG, Live tables on dwelling stock (including vacants), Table 100 Dwelling stock: Number of Dwellings by Tenure and district: England; 2019

⁵⁹ MHCLG, Median house price to residence based earnings, 2019

⁶⁰ ONS, Percentage of renters' median monthly household income spent on median monthly rent, by region, England, FYE 2018

⁶¹ Local Authority Homelessness Statistics (England), 2019

⁶² Dartford Borough Council Five Year Housing Supply 2019 – 2024

Resort Access Road. This land take could inhibit housing delivery in the area. Also, the access road could indirectly interrupt housing delivery in the Station Quarter South neighbourhood identified in the Ebbsfleet Development Framework 2017. Housing delivery is planned at a local authority level. The parts of the Ebbsfleet Development Framework which could be impacted in this way are located within Dartford, and so the study area is Dartford.

Baseline

7.3.113 The Ebbsfleet Garden City is aiming to deliver up to 15,000 new homes by 2035.⁶³ Of the 11,500 consented (maximum parameter), 84% are in Dartford and 16% in Gravesham.⁶⁴ As noted above in paragraphs 7.114 and 7.115, Dartford has a highly sensitive housing market and, whilst it has a strong housing market with sufficient identified housing supply over the five year plan period, the Garden City's future housing delivery is crucial to Dartford achieving its future targets for new homes. Of the (maximum) 11,500 homes consented across the Garden City, 2,320 of them are allocated on the two areas (SQS and SQN) which could be impacted by London Resort's PSB (both of which fall within Dartford); specifically 1,390 in Station Quarter South and 930 in Station Quarter North.⁶⁵

Future baseline

7.3.114 There are not expected to be any further significant housing allocations in the SQS and SQN zones that could be potentially be affected by the London Resort. However, it is understood that EDC is working on a masterplan which will lead to a planning application for a more residential-led scheme, and with potential greater intensification of residential uses. It is therefore possible that more of the Garden City's homes could be delivered elsewhere across the masterplan and not on the areas of land which are impacted by the London Resort, thus reducing the potential sensitivity of these areas and potential for any adverse impact. There are not expected to be any further significant housing allocations in the area that could be potentially be affected. COVID-19 is not expected to affect the future baseline in terms of additional housing allocations in the area.

OPERATIONAL PHASE

Employment generation and labour markets, skills and training

7.3.115 The operational phase of the London Resort is expected to support a large number of staff, a large proportion of which are expected to be local residents. To assess the impact of this, existing employment on site, as well as in the CSA and LCA should be

⁶³ Ebbsfleet Development Corporation, 2020, The Vision. Retrieved from <https://ebbsfleetdc.org.uk/the-vision/>. Accessed December 2020.

⁶⁴ Ebbsfleet Development Corporation, 2017, Ebbsfleet Implementation Framework

⁶⁵ Ebbsfleet Development Corporation, 2017, Ebbsfleet Implementation Framework

understood, along with the mobility and availability of the potential workforce.

7.3.116 The operational phase of the London Resort will also provide key learning opportunities for its employees to upskill and train, reaching higher levels of qualification and, subsequently, improving employability and incomes.

7.3.117 The baseline for these two employment effects is not split by effect but by residential and workplace-based employment data.

Baseline – residence based

Population and population growth

7.3.118 In 2019, the CSA had a residential population of approximately 393,900. It had grown 12% since 2009; faster than the SRCA (9%), RCA (10%) and UK comparator (7%) and on par with LCA (13%).

Table 7.3.34 Population and population growth, 2009 and 2019

	2009	2019	% growth
CSA	350,500	393,900	12%
SRCA	3,230,000	3,523,600	9%
LCA	7,462,100	8,417,700	13%
RCA	22,185,000	24,378,200	10%
UK	62,260,500	66,796,800	7%

Source: ONS, Mid-year population estimates, 2019; Volterra estimates

7.3.119 Table 7.3.35 shows that 63% of the CSA residential population are of working age (16 to 64 years); broadly comparable with the other geographical comparators. Only 15% of the CSA population are aged over 65; lower than the SRCA (20%), RCA (17%) and UK (19%).

Table 7.3.35 Population age structure, 2019

	0 to 4	5 to 11	12 to 17	18 to 64	65+	16 to 64
CSA	28,700	40,000	29,200	237,500	58,500	246,500
	7%	10%	7%	60%	15%	63%
SRCA	6%	9%	7%	58%	20%	61%
LCA	7%	9%	7%	63%	14%	65%
RCA	6%	9%	7%	61%	17%	63%
UK	6%	9%	7%	60%	19%	62%

Source: ONS, Mid-year population estimates, 2019

Population and employment density

7.3.120 The LCA and CSA have high population densities at 13.7 and 11.8 residents per hectare respectively; far higher than the SRCA (4.8), RCA (6.1) and UK (2.8). Similarly, both the LCA and CSA have higher employment densities at 7.9 and 4.9 workers per hectare respectively than the SRCA, RCA and UK (1.9, 3.1 and 1.3 respectively).

Table 7.3.36 Population and (workplace) employment density, 2019

	Population	Population Density	Employment	Employment Density
CSA	393,900	11.8	163,000	4.9
SRCA	3,523,600	4.8	1,410,000	1.9
LCA	8,417,700	13.7	4,890,500	7.9
RCA	24,378,200	6.1	12,446,000	3.1
UK	66,796,800	2.8	30,814,500	1.3

Sources: ONS, *Mid-year population estimates, 2019*; ONS, *Business Register and Employment Survey, 2018*; ONS, *Census Table QS102UK, 2011*

Economic activity of residents

7.3.121 In 2019, 85% of working age residents in the CSA were economically active, higher than all other geographies. In the LCA, 79% were economically active, on par with the UK. Additionally, 81% of working age CSA residents were in employment – higher than all other geographies. In the LCA, 76% were employed, on par with the national average but lower than the other geographies.

Table 7.3.37 Labour market characteristics, January to December 2019

	Working age pop	Economically active		Employed	
CSA	245,600	208,600	85%	199,900	81%
SRCA	2,121,600	1,712,700	81%	1,652,200	78%
LCA	5,498,800	4,353,700	79%	4,176,000	76%
RCA	15,414,900	12,350,700	80%	11,889,500	77%
UK	41,330,500	32,556,700	79%	31,266,400	76%

Source: ONS, *Annual Population Survey, 2019*

Resident and workplace qualifications

7.3.122 The construction baseline (see paragraphs 7.3.22 and 7.3.23) found that the residents and workers of the CSA appear to be qualified to a lower level than the comparator geographies. Conversely, residents in the LCA had a higher proportion of residents qualified to NVQ4+ and NVQ3+ level (45% and 61% respectively) than the UK (40% and 58%).

Median earnings

- 7.3.123 Table 7.3.38 shows that both residence-based and workplace-based earnings in the CSA are higher than their corresponding national averages.
- 7.3.124 Residence-based analysis shows that annual incomes in the CSA are marginally (-2.7%) lower than annual incomes across the SRCA and RCA, whereas workplace-based analysis shows that annual incomes in the CSA are slightly (+1.9% to +6.3%) higher than incomes across the SRCA and RCA.

Table 7.3.38 Annual earnings across study areas, 2019

	Median annual earnings	
	Residence based analysis	Workplace based analysis
CSA	£31,900	£32,000
SRCA	£32,800	£30,100
RCA ⁶⁶	£32,800	£31,400
UK	£30,400	£30,400

Source: ONS, *Annual Survey of Hours and Earnings, 2019*. Note: due to data availability, LCA estimates have been excluded due to unreliable data.

Availability of workforce

- 7.3.125 The construction baseline (Table 7.3.7) found that, in 2019, there were 8,700 unemployed people in the CSA; an unemployment rate of 4.2%, higher than the national rate 4.0%. In the LCA, there are estimated to be 173,000 unemployed people (4.0%), higher than the national and regional rate. In 2019, there were 3,720 NEETs in the SRCA (data is not available at the CSA level) which equates to 5.1% of 16 to 17 year olds – slightly lower than the national average of 5.5%. As noted previously, the proportional representation of NEETs is noticeably higher in Medway (6.9%) and Kent (6.4%) than the SRCA (5.1%). The construction baseline also found that there were an average of 6,000 claimants in the CSA and 51,000 in the LCA (both 2.6% of the 16-64 population), on par with the national average (2.6%).
- 7.3.126 In terms of general workforce churn, the Bank of England report that, on average, every quarter around 6% of working-age people move between the three labour market states: employment, unemployment and inactivity. A further 2% move between jobs.⁶⁷ The ONS found that 29% of workers have a different employer to the one they had 12 months prior, and 6% of workers had moved from being employed to not in

⁶⁶ London has been excluded from the RCA to avoid positively skewing the earnings data.

⁶⁷ Retrieved from <https://www.bankofengland.co.uk/monetary-policy-report/2020/january-2020/in-focus-the-labour-market>. Accessed June 2020.

employment.⁶⁸

Education

7.3.127 Most relevant to the development of skills are higher education institutions and other education and training bodies. However, this subsection also discusses early years and school aged provision so that all education baseline is in one place. The early years and school aged provision is relevant to the potential operational effect on public services.

7.3.128 Across the CSA, there are 26,280 children aged 0-4, some of which may require early years childcare places. Currently, there are 13,200 registered childcare places within the CSA.

7.3.129 The KCC childcare sufficiency assessment models early years demand based on historic take up rates, reporting 59% in Dartford and 58% in Gravesham. Compared to places provision, this elicits an indicative surplus of places for Dartford (1,840 places) and a deficit for Gravesham (-410 places). The Thurrock sufficiency assessment did not do similar demand modelling. Therefore, to estimate the equivalent figure for Thurrock, the average take up rate from Dartford (59%) and Gravesham (58%) was applied to the 0-4 Thurrock population, to elicit a modelled demand of 7,340. Compared to 3,680 places, Thurrock have an indicative deficit of -3,660 places. Overall, the CSA has an indicative deficit of -2,230 places, demonstrating constrained supply.

Table 7.3.39 Early years provision in the CSA

Area	Aged 0-4 population	Modelled demand based on take up rates	Indicative take up rate	Registered childcare places	Net childcare places
Dartford	7,370	4,350	59%	6,190	1,840
Gravesham	6,410	3,740	58%	3,330	-410
Thurrock	12,500	7,340*	59%*	3,680	-3,660
CSA	26,280	15,430	-	13,200	-2,230

Source: KCC Childcare Sufficiency Assessment (2019/2020); Thurrock Childcare Sufficiency Assessment (September 2019). Note * denotes estimated based on average take up rate in Dartford and Gravesham

7.3.130 There are seven primary schools in the CIA and one secondary school.

7.3.131 For primary schools, three are operating at or above capacity, and hence are constrained. These are highlighted in red text in Table 7.3.40. The total for the CIA is 91% compared to 92% for both the CSA and England & Wales. Within the CIA this is skewed by the inclusion of Cherry Orchard Primary Academy which only opened in 2017 and is currently operating at 46% of capacity. All other schools in the CIA are operating at or above the national level of student to capacity constraint. Cherry Orchard Primary

⁶⁸ ONS, Employee turnover levels and rates by industry section, UK, January 2017 to December 2018

Academy school is Ebbsfleet Garden City's first primary school, serving the primary education needs of this new development and forming a key new element of the local community.

Table 7.3.40 Primary education provision within the CIA

School Name	Type	No. of Students	Total Capacity	% of School Capacity
Cherry Orchard Primary Academy	Primary	192	420	46% ⁶⁹
Lawn Primary School	Primary	241	262	92%
Bean Primary School	Primary	203	210	97%
Painters Ash Primary School	Primary	411	420	98%
Manor Community Primary School	Primary	673	674	100%
The Craylands School	Primary	301	300	100%
St Mary's Catholic Primary School	Primary	254	210	121%
CIA	Primary	2,275	2,496	91%
CSA	Primary	36,126	39,231	92%
England & Wales	Primary	4,557,852	4,938,159	92%

Source: Department for Education, Edubase 2020

7.3.132 There is one secondary school within the CIA – the Ebbsfleet Academy, which is operating at 83% of capacity compared to 92% for the CSA and 85% for England & Wales.

Table 7.3.41 Secondary education provision within the CIA

School Name	Type	No. of Students	Total Capacity	% of School Capacity
The Ebbsfleet Academy	Secondary	625	750	83%
CSA	Secondary	26,143	28,348	92%
England & Wales	Secondary	2,987,009	3,507,312	85%

Source: Department for Education, Edubase 2020

⁶⁹ This schools' relatively low operating capacity could be due to the fact that it only recently opened in September 2017

7.3.133 Across the CSA, there are six colleges/further education establishments (three in Dartford, two in Gravesham, and one in Thurrock). Complete data on each college is only available for three of the six colleges. All three of these colleges are operating under full capacity, although Northfleet Technology College is nearing full capacity (currently operating at 98%).

7.3.134 A diverse range of courses are on offer at these colleges. For instance, Dartford Science & Technology College offers vocational courses in digital technology and travel & tourism⁷⁰, whilst The Leigh UTC offers programmes with a focus in engineering and computer science.⁷¹ Northfleet Technology College also provides courses that are more creative-based such as art & design as well as languages (French and Spanish).⁷²

Table 7.3.42 Colleges and further education provision within the CSA

College Name	Borough	Type	No. of students	Total capacity	% of capacity	Relevant courses
The Leigh UTC	Dartford	University technical college	481	960	50%	IB school with STEM rich experiences, universities and business partners Technical Bacallaureate (/ T-levels) Advanced Apprenticeships Higher Apprenticeships
Dartford Science & Technology College	Dartford	Foundation school	741	950	78%	Vocational courses including Travel and Tourism (theory based course leading towards a career in hotels), Financial Studies and Business
Northfleet Technology College	Gravesham	Foundation school	966	989	98%	Creative courses including Art & design as well as languages (including French and Spanish)
LINK19 College	Gravesham	Special post 16 institution	NA	60	NA	Vocational subjects include retail, catering and hospitality. Courses include supported work experience, working with many placement providers in the community where interns learn the specific skills of

⁷⁰ Dartford Science & Technology College, Post 16 Course Directory 2020/21

⁷¹ <https://theleighutc.org.uk/post-16/>

⁷² <https://ntc.kent.sch.uk/options/>

College Name	Borough	Type	No. of students	Total capacity	% of capacity	Relevant courses
						that job as well as develop their transferable employability skills.
North Kent College (NKC)	Dartford	Further education	NA	NA	NA	Hospitality and catering professional development courses including Chef Diplomas, food service diplomas and hospitality & event management. The programme can be assessed at work or in a simulated professional restaurant. The London Resort engaged with NKC. They offer apprenticeships and industry placements across a wide range of vocations and employers. It forms part of the Bluewater Learning Shop, working closely with both employers and students looking to upskill.
National College for the Creative and Cultural Industries	Thurrock	Further education	NA	NA	NA	The National College works closely with a wide range of employers to deliver exceptional training to the creative sector (defined broadly as technical and production, audience and participation, costume and set design, stage management, front of house and operation).

Source: Department for Education, Edubase 2020

7.3.135 Additional further education institutions can also be found across the Thames Estuary area. There are reported to be 63 higher and further education institutions across this region, some of which specialise in creative industries and have a key role to play in the region's future development.⁷³ Although many of these institutions do not strictly lie within the CSA, they still provide important opportunities to those seeking to attain

⁷³ Thames Estuary Growth Commission (2018), 2050 Vision

skills that may benefit the local economy. Several examples of these institutions include the University of Kent's Centre for Journalism, Centre for Professional Practice and Schools of Computing, Music and Fine Arts. Notably, the University of Creative Arts at Rochester is heavily regarded as one of the leading institutions offering FE and HE education and training, particularly in the creative arts which encompasses fashion, photography, product design and digital animation courses.

7.3.136 The area currently suffers from a lack of vocational opportunities for both young people and adults.⁷⁴ Nationally, a third of young people (15-19 year olds) choose vocational pathways. This equates to 81,000 across the SELEP area. However, there is a general shortage of qualified trainers aligned to growth sectors, exacerbated by, and impacting upon, skills shortages in industries.⁷⁵

Future baseline – residence based

7.3.137 Table 7.3.43 shows the projected population (all ages and working age) for the CSA, LCA and England across key assessment years, and the cumulative growth from 2018 for each future year.

7.3.138 Significant population growth is expected in the CSA over the next 20 years, with a higher cumulative growth than both the LCA and England at each assessment year. This is likely due to the substantial development planned in the area, most notably Ebbsfleet Garden City. The LCA is expected to grow at a faster rate than England in all assessment years.

7.3.139 These patterns are seen in both all ages and working age population statistics. The CSA labour market (workforce) is forecast to grow by an estimated 7% over the period to 2025 and 13% over the period to 2038. This report found no data to inform the future baseline levels of skills and training of the workforce, and effects are assessed against the current baseline levels.

7.3.140 At all geographies, the working age population is growing at a slower rate than the total population, reflective of the national expectation of an aging population.

Table 7.3.43 Projected population growth between 2018 and 2038

		2018	2022	2023	2025	2028	2030	2038
All ages	CSA	389,000	405,000	409,000	415,000	424,000	429,000	447,000
			4%	5%	7%	9%	10%	15%
	LCA	8,360,000	8,603,000	8,652,000	8,736,000	8,848,000	8,919,000	9,204,000
			3%	4%	5%	6%	7%	10%
	England	55,977,000	57,282,000	57,558,000	58,060,000	58,752,000	59,182,000	60,766,000
			2%	3%	4%	5%	6%	9%
	CSA	244,000	253,000	256,000	260,000	265,000	268,000	277,000

⁷⁴ KCC, 2017, Revised 14-24 learning, employment and skills strategy 2017-2020

⁷⁵ SELEP, 2018, South East LEP Skills Strategy 2018 - 2023

16 to 64			4%	5%	7%	9%	10%	13%
	LCA	5,472,000	5,606,000	5,634,000	5,680,000	5,733,000	5,760,000	5,837,000
			2%	3%	4%	5%	5%	7%
	England	35,049,000	35,522,000	35,624,000	35,812,000	36,003,000	36,043,000	36,066,000
		1%	2%	2%	3%	3%	3%	

Source: ONS, Population projections - local authority based by single year of age, 2018

7.3.141 These projections have been sense checked against the Ebbsfleet proposals and they appear broadly consistent with the anticipated population growth planned within the EDC.

7.3.142 Diagram 7.3.4 shows the EDC Framework for education provision. The Dartford Borough Council Infrastructure Delivery Plan⁷⁶ states that there is to be a 2FE primary school in the Northern Gateway by 2020; this is outside the CIA, near Dartford Town Centre. Also, a 4 to 8 FE secondary school at Alkerden (Eastern Quarry) will be delivered (4FE by 2021) to meet demand from EGC developments and potentially some demand from outside this area. Eastern Quarry itself will deliver two primary schools by 2022-2027 (phased delivery with 1FE at first, then 1FE in line with the housing development), to meet demand from the later phase of the project. Finally, an 8FE secondary school is to be delivered in Stone (just outside the CIA), in order to meet demand from nearby housing growth and demographic changes. This will be delivered by 2021-2023.

Baseline – workplace based

Employment on site

7.3.143 A thorough assessment of existing employment on site has been carried out. The methodology applied in this analysis is described earlier in this baseline (see paragraphs 7.3.70 to 7.3.71). It is estimated that businesses located within the PSB support 1,040 FTEs (1,160 jobs).

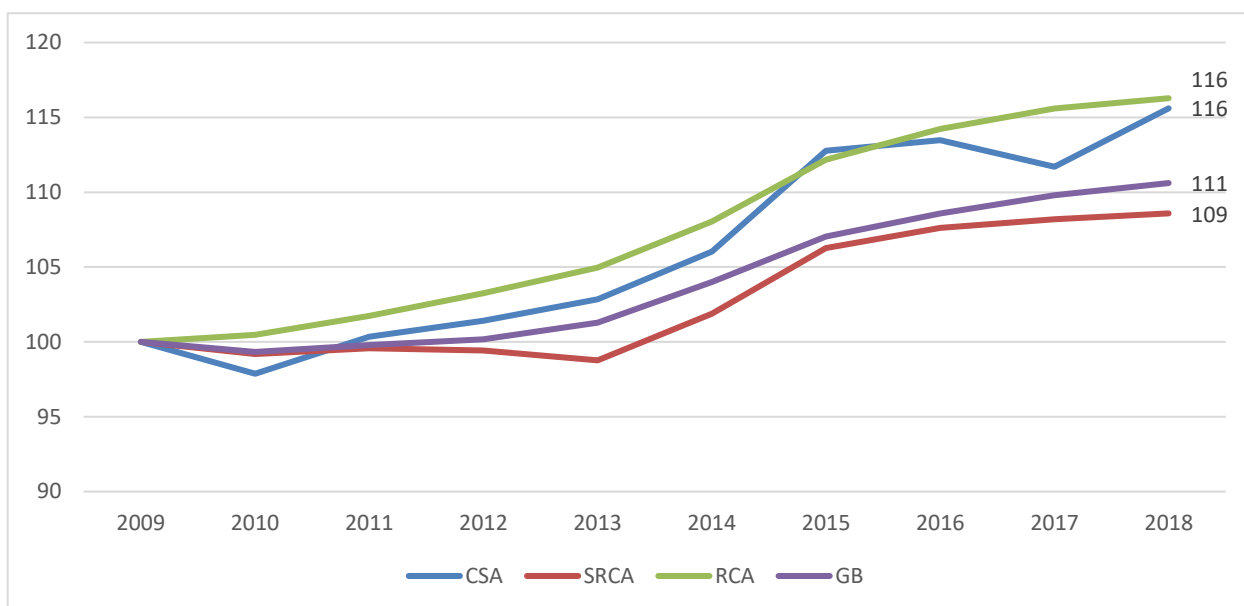
Historic employment growth

7.3.144 Diagram 7.3.12 below displays an index of employment growth across the study areas. Since 2009, the CSA and RCA have grown by 16%, faster than GB (11%) and SRCA (9%).⁷⁷ The CSA did experience a dip in 2017 which was not seen in other areas. This was mostly driven by Dartford, which recorded 5,000 fewer jobs in 2017 than in 2016. Half of these Dartford losses (2,500 jobs) were recovered in 2018.

⁷⁶ Dartford Borough Council, 2019, Infrastructure Delivery Plan

⁷⁷ The Business Register and Employment Survey 2009 to 2015 did not include VAT/PAYE businesses. Since then, however, the lead definition has changed and so the 2015 to 2018 series does include these businesses. The difference between the two 2015 values in each series is c. 1%. Although the two series cannot therefore be directly equated, both have been shown for trend comparison purposes.

Diagram 7.3.12 Index of employment growth 2009 to 2018 (2009 = 100)



Source: ONS, Business Register and Employment Survey, 2009 to 2018

Number and proportion of workers by industry

7.3.145 Table 7.3.44 shows that, of the 163,000 workers in the CSA, retail has the highest proportion of employment at 15%, far higher than the SRCA (11%), RCA (9%) and GB (9%) levels. Similarly, a high proportion of workers are employed in transport and storage (12%) compared to the other geographical comparators (5% to 6%). On the other hand, the CSA has a smaller proportion of its workforce employed in professional, scientific and technical industries (4%) than the SRCA (7%), RCA (11%) and GB (9%).

Table 7.3.44 Employment by industry, 2018

	CSA		SRCA	LCA		RCA	GB
Agriculture, forestry & fishing (A)	1,000	1%	2%	2,500	0%	1%	2%
Mining, quarrying & utilities (B, D and E)	2,400	1%	1%	46,500	1%	1%	1%
Manufacturing (C)	8,800	5%	7%	151,000	3%	5%	8%
Construction (F)	12,800 ⁷⁸	8%	7%	221,500	5%	5%	5%
Motor trades (Part G)	4,800	3%	3%	57,500	1%	2%	2%
Wholesale (Part G)	6,500	4%	4%	154,500	3%	4%	4%
Retail (Part G)	24,500	15%	11%	414,000	8%	9%	9%
Transport & storage (inc postal) (H)	18,800	12%	6%	196,000	4%	5%	5%

⁷⁸ Note that this does not match the 13,000 reported in **Table 7.3.3** due to rounding in the original BRES dataset

	CSA		SRCA	LCA		RCA	GB
Accommodation & food services (I)	11,000	7%	7%	381,500	8%	8%	8%
Information & communication (J)	3,300	2%	3%	329,000	7%	6%	4%
Financial & insurance (K)	1,500	1%	3%	379,000	8%	4%	3%
Property (L)	1,800	1%	2%	120,000	2%	2%	2%
Professional, scientific & technical (M)	7,300	4%	7%	675,000	14%	11%	9%
Business administration & support services (N)	19,800	12%	8%	509,000	10%	10%	9%
Public administration & defence (O)	3,800	2%	3%	164,500	3%	4%	4%
Education (P)	13,300	8%	10%	364,500	7%	8%	9%
Health (Q)	16,800	10%	13%	497,000	10%	11%	13%
Arts, entertainment, recreation & other services (R,S,T and U)	4,600	3%	4%	227,500	5%	5%	5%
Total	163k	100%	1.4m	4.9m	100%	12m	31m

Source: ONS, Business Register and Employment Survey, 2018

Businesses counts

7.3.146 There are 15k registered businesses in the CSA, 91.7% of which are micro firms. This is only slightly higher than the comparator geographies, all of which have a large majority of firms as micro. The CSA has a slightly smaller proportion of small firms (6.8%) compared to the national level (8.6%) and a very slightly smaller proportion of large firms (0.2%) than the national level (0.4%).

Table 7.3.45 Business by size (number of employees), 2019

		Micro (0 to 9)	Small (10 to 49)	Medium (50 to 249)	Large (500+)	Total
CSA	Number	13,580	1,010	200	40	15k
	%	91.7%	6.8%	1.3%	0.2%	100%
SRCA		90.2%	8.1%	1.4%	0.3%	143k
RCA		90.4%	7.8%	1.5%	0.4%	1.2m
UK		89.5%	8.6%	1.5%	0.4%	2.7m

Source: ONS, UK Business Counts, 2019. Note: LCA estimates have been excluded due to unreliable data.

Zero hours contracts

7.3.147 It is estimated that, across the UK, there are currently 1 million people on zero hours contracts (ONS, 2020); equivalent to 3% of the workforce. 16-24 year olds represent

36% of all those on zero hour contracts despite only representing 11% of the total workforce, implying that young workers are more likely to be on these types of contracts. The contracts were banned in Ireland in 2019 in almost all circumstances. The TUC have been leading calls alongside trade unions such as Unison, Unite and GMB to ban zero-hours contracts.

Apprenticeship starts (per 1,000 workers, by industry, by age, by level)

7.3.148 In the academic year 17/18, there were 2,490 apprenticeship starts in the CSA. This is a smaller number of starts than seen in any of the other academic years; this decline is a pattern seen across all geographies. In fact, the reduction in starts was slightly less severe in the CSA than in all other geographies (-16% in comparison to between -20 and -25% across the other geographies). The 17/18 CSA starts equated to 15.3 starts per 1,000 workers – on par with rates seen in the SRCA and SELEP (15.1), slightly higher than England (14.0) and far higher than the RCA rate (10.1) which is mainly brought down by London, which only has 7.2 starts per 1,000 workers.

7.3.149 In 17/18, there were 1,630 achievements in the CSA. Over the period 14/15 to 17/18, the CSA saw an annual average achievement rate of 58% (where annual average achievement rate is the sum of achievements 14/15 to 17/18 as a proportion of sum of starts over same period, to account for the fact that apprenticeships can take multiple years before they are achieved), which is on par with all geographies.

Table 7.3.46 Apprenticeship starts and average annual achievement rates, academic years 14/15 to 17/18

	14/15	15/16	16/17	17/18			
	Starts	Starts	Starts	Starts	Starts per 1,000 workers	Achievements	Annual average achievement rate (14/15 to 17/18)
CSA	2,980	2,930	2,910	2,490	15.3	1,630	58%
SRCA	26,960	27,100	26,340	21,320	15.1	14,410	57%
SELEP	31,940	32,440	31,610	25,240	15.1	17,270	57%
RCA	151,960	154,520	149,580	121,000	10.1	83,150	57%
England	500,090	509,430	495,070	376,030	14.0	276,350	58%

Source: Department for Education, Apprenticeships and traineeships data, 2019; ONS, Business Register and Employment Survey, 2018

7.3.150 Table 7.3.47 shows that 34% of CSA starts in 17/18 were in business administration and law, which is the industry with the highest proportion of starts across all comparison areas. All geographies only have around 2% of starts in leisure, travel and tourism. Whilst starts per 1,000 workers is not available at industry level, it is notable that by comparison that tourism makes up approximately 10% of employment in England.⁷⁹ In

⁷⁹ ONS, 2014, Tourism employment summaries: Characteristics of tourism industries

Gravesham, the figure is 3-6% and in Dartford it is 8-13%.⁸⁰ This suggests a shortfall in start provision in this industry.

7.3.151 All industries vary slightly in their average annual achievement rates, with the highest tending to be leisure, travel and tourism and the lowest in construction, planning and the built environment.

Table 7.3.47 Apprenticeship starts and achievements (academic year 17/18) and average annual achievement rate (14/15 to 17/18)

		Business, Administration and Law	Construction, Planning and the Built Environment	Engineering and Manufacturing Technologies	Health, Public Services and Care	Leisure, Travel and Tourism	Retail and Commercial Enterprise	Other*
Starts (17/18)	CSA	860	140	450	460	60	330	230
% starts (17/18)	CSA	34%	6%	18%	18%	2%	13%	9%
	SRCA	30%	7%	16%	23%	2%	14%	8%
	SELEP	30%	7%	15%	24%	2%	14%	8%
	RCA	31%	5%	14%	23%	3%	14%	9%
	England	30%	6%	16%	24%	2%	14%	8%
Achievements (17/18)	CSA	490	70	260	440	60	180	140
Four year average Annual Achievement Rate	CSA	56%	48%	53%	60%	65%	62%	63%
	SRCA	55%	44%	57%	55%	69%	63%	62%
	SELEP	55%	44%	57%	55%	70%	63%	62%
	RCA	53%	47%	63%	54%	70%	61%	61%
	England	56%	51%	61%	55%	72%	61%	60%

Source: Department for Education, Apprenticeships and traineeships data, 2019. *Note: 'Other' industries consist of: Agriculture, Horticulture and Animal Care, Arts, Media and Publishing, Education and Training, Information and Communication Technology and Science and Mathematics

7.3.152 In 17/18, nearly half of apprenticeship starts in the CSA were at an advanced level (47%), slightly higher than other geographical comparators (44% to 46%). A small proportion of starts were at the higher level (14%), which is on par with other comparators (13% to 15%).

7.3.153 Between 14/15 and 17/18, the annual average achievement rate is highest for intermediate apprenticeships in all areas (the CSA has the highest at 66% compared to 62% to 63% in other geographies). The higher apprenticeship has the lowest average annual achievement rate of all the levels: it is 27% in the CSA and only reaches a high

⁸⁰ Destination Research, 2017, Economic Impact of Tourism in Kent

of 31% (SELEP level).

Table 7.3.48 Apprenticeship starts and average annual achievement rates by level, academic year 17/18

		Intermediate	Advanced	Higher
Starts	CSA	980	1,160	350
% starts	CSA	39%	47%	14%
	SRCA	43%	44%	13%
	SELEP	43%	44%	13%
	RCA	39%	46%	15%
	England	43%	44%	13%
Achievements	CSA	850	680	100
Average Annual Achievement Rate (14/15 to 17/18)	CSA	66%	54%	27%
	Sub-RCA	63%	54%	30%
	SELEP	62%	54%	31%
	RCA	63%	54%	28%
	England	63%	56%	29%

Source: Department for Education, Apprenticeships and traineeships data, 2019

7.3.154 In 17/18, apprenticeship starts were fairly evenly split across age groups, with approximately 30% for under 19s and for 19-24s, and 39% for 25+ year olds. This is on par with all geographical areas except the RCA, which only had 25% of starts at the under 19 age group, and 43% at the 25+ age group.

7.3.155 In general, the 19-24 age group had the highest average annual achievement rate (just over 60% in all geographies) and the under 19s were slightly lower (between 58% and 60% across all geographies). The 25+ age group had a lower average annual achievement rate than the other age groups, at between 52% and 54% across all geographies.

Table 7.3.49 Apprenticeship starts and average annual achievement rates by age, academic year 17/18

		Under 19	19-24	25+
Starts	CSA	760	770	970
% starts	CSA	30%	31%	39%
	Sub-RCA	30%	31%	39%
	SELEP	29%	30%	41%
	RCA	25%	31%	43%
	England	28%	30%	41%
Achievements	CSA	470	480	670
Average Annual Achievement	CSA	59%	62%	53%
	Sub-RCA	58%	63%	53%
	SELEP	58%	62%	52%

		Under 19	19-24	25+
Rate (14/15 to 17/18)	RCA	60%	61%	52%
	England	60%	62%	54%

Source: Department for Education, Apprenticeships and traineeships data, 2019

7.3.156 It is estimated that, across the UK, there are currently 1 million people on zero hours contracts,⁸¹ equivalent to 3% of the total workforce. 16-24-year olds represent 36% of all those on zero hour contracts despite only representing 11% of the total workforce, implying that young workers are more likely to be on these types of contracts.

Commuting patterns

7.3.157 In terms of out-commuting, the CSA suffers from very high levels of out-commuting given the proximity to London. The table below shows the out-commuting proportion for each of the CSA local authorities and the proportion that are working in London. Overall, it can be seen that every local authority in the CSA has a higher proportion of residents commuting out of the borough than the UK average of 46%.

Table 7.3.50 Out commuting in the CSA

	Out commuting	% to London
Dartford	66%	47%
Gravesham	66%	34%
Thurrock	54%	34%
South East	51%	12%
UK	46%	15%

Source: Census, 2011

Future baseline – workplace employment

7.3.158 Table 7.3.51 shows employment projections by assessment year for the CSA and UK. No single source was available which provided consistent job forecasts for each LPA, and so the forecasts have been projected using the implied compound annual growth rate from several different sources, as described in Table 7.3.51.

7.3.159 Based on the forecasts below (Table 7.3.51) employment in the CSA is expected to grow by an average rate of 1.3% a year, which is higher than the national annual growth rate (0.5%).

⁸¹ ONS, 2020

Table 7.3.51 Do nothing employment projections by assessment year

Area	Source for Forecast	Implied compound annual growth rate	2018	2022	2023	2025	2028	2030	2038
Thurrock	Forecast growth in labour force in the 2017 SHMA (2014 – 2037). ⁸²	1.1%	68,000	71,000	72,000	73,000	76,000	77,000	84,000
Gravesham	Forecast jobs growth from the North Kent Strategy Housing & Economic Needs Assessment (2012-2028). ⁸³	0.9%	33,000	34,000	34,000	35,000	36,000	37,000	39,000
Dartford	Forecast jobs growth in Dartford between 2013 and 2031. ⁸⁴	1.8%	61,000	66,000	67,000	69,000	73,000	76,000	88,000
CSA	Sum of the above	1.3%	162,000	171,000	173,000	178,000	185,000	190,000	211,000
National	Forecast jobs growth from the OBR between Q1 2018 and Q1 2024. ⁸⁵	0.5%	32.3m	32.9m	33.0m	33.4m	33.7m	34.1m	35.4m

7.3.160 These projections have been sense checked against the Ebbsfleet proposals and they appear broadly consistent with the anticipated employment growth planned within the EDC.

COVID-19

7.3.161 Per the construction baseline, COVID-19 has had a severe impact on employment, increasing worklessness across the country. However, these impacts are expected to be short term, and recovery is expected to have largely occurred by 2024 (opening year, recovery is actually largely expected before this time). For skills and training, the impact of the pandemic is unclear. However, it is not likely that it will have a material impact on the need for skills, which are the backbone of the economy, driving employment and productivity. It follows that the projected economic recovery will implicitly include a retained and potentially expanded demand for skills and training. Stakeholders have identified that early evidence suggests that young people have suffered most during the slowdown caused by the pandemic. Upskilling these young people and finding appropriate job opportunities and careers for them will therefore remain a key priority.

Potential effects of trade creation and diversion relating to theme parks

7.3.162 The London Resort will provide a tourist attraction unlike any that currently exist in the UK. It may also attract some trade away from similar attractions (or be perceived to do

⁸² Turley Economics (2017), Addendum to the South East Strategic Housing Market Assessment. Table 3.2.

⁸³ GVA (2017), North Kent Strategic Housing & Economic Needs Assessment: Employment Land Needs Assessment. Table 24.

⁸⁴ https://www.kent.gov.uk/_data/assets/pdf_file/0017/50345/Understanding-Kent-and-Medways-growth-requirements-GIF.pdf

⁸⁵ <https://obr.uk/forecasts-in-depth/the-economy-forecast/labour-market/>

so) that already exist in the UK. Existing provision of theme parks at different spatial levels are therefore detailed in this section.

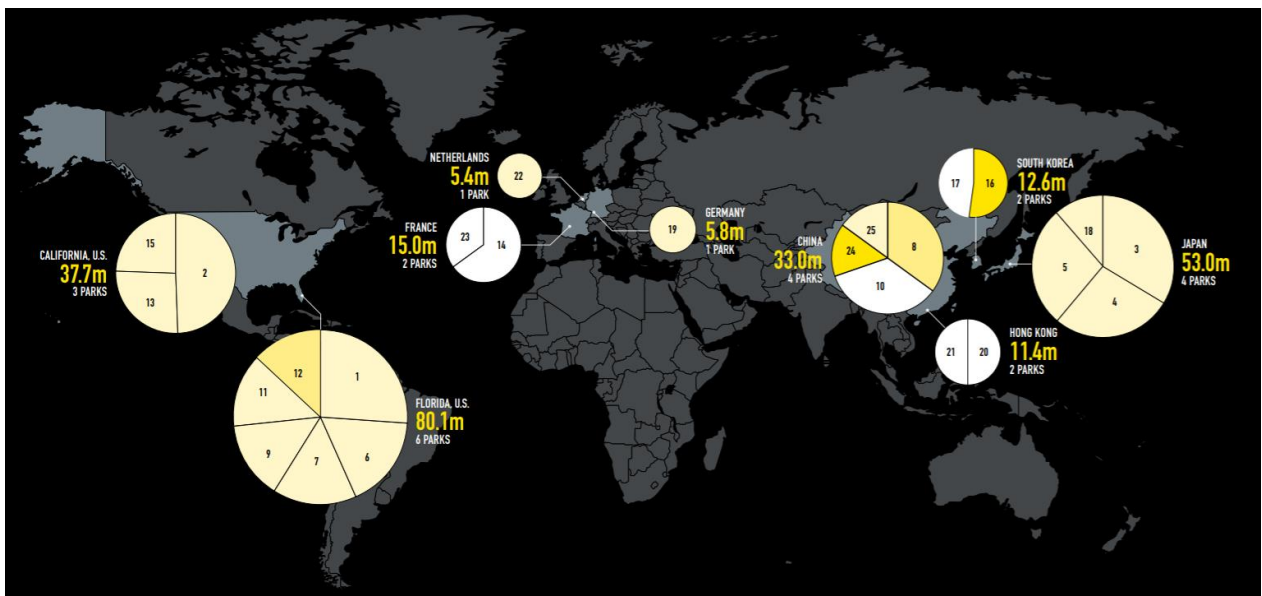
Baseline

Entertainment parks – global

7.3.163 Diagram 7.3.13 displays the locations of the top 25 global amusement / theme parks, according to Aecom, by visitor number. Visitor numbers ranged from 4.9m (Chimelong Paradise, Guangzhou, China) to 21m (Magic Kingdom Theme Park at Walt Disney World Resort, Lake Buena Vista, FL, U.S.). The London Resort is expecting to be within this range of visitors per year, hence would be considered a global attraction.

7.3.164 None of the top 25 are in the UK; the closest being Disneyland Paris and Walt Disney Studios Park (at Disneyland Paris) in France (with 9.7m and 5.2m visitors respectively).

Diagram 7.3.13 Global amusement / theme parks and 2019 visitor numbers



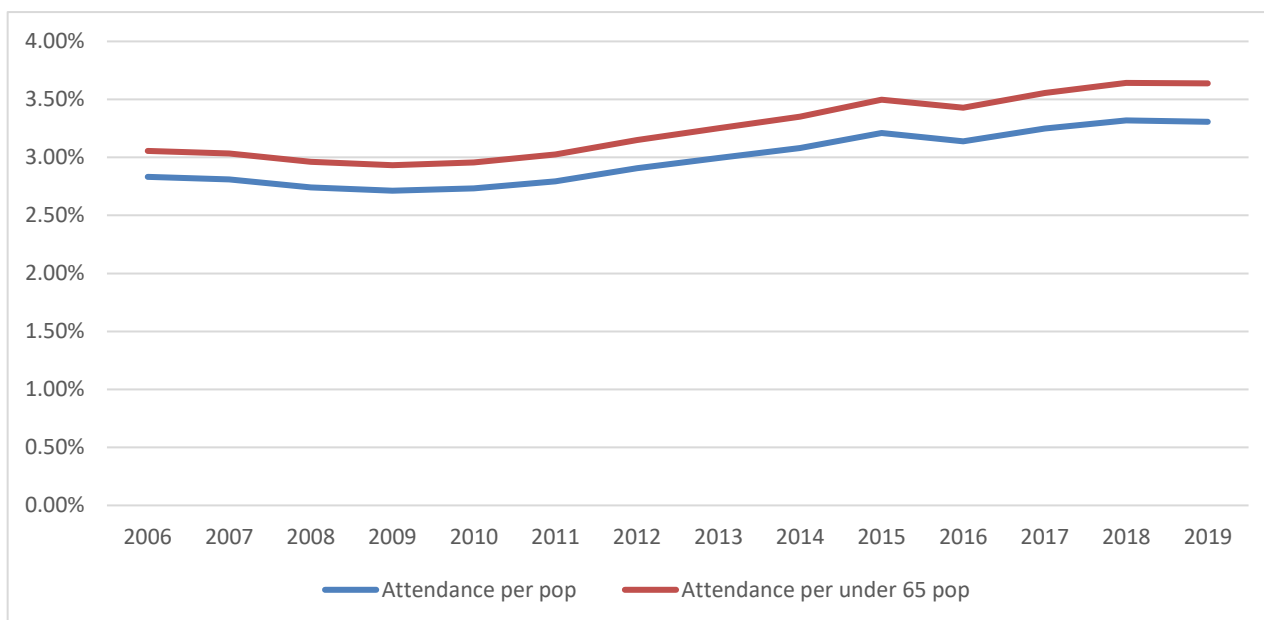
Source: Aecom, Theme Index, 2019

7.3.165 Over time, attendance at the top 25 global theme parks has been growing, from 187m in 2006 to c. 254m in 2019. Over this time period, both the total global population, and the population aged under-65 (the most likely demographic to visit such global attractions⁸⁶) has been growing but at a slightly slower rate. The global population has increased from 6.6bn in 2006 to 7.6bn in 2018, and the under 65s have grown slightly slower from 6.1bn in 2006 to 7.0bn in 2018. This means that attendance as a proportion

⁸⁶ This population comparison is intended to capture the majority of likely visitors to these top 25 theme parks. It is not an exclusive metric.

of total population has also been increasing, from 2.8% in 2006 to 3.3% in 2019. As a proportion of the under 65s, attendance has grown from 3.1% to 3.6%.

Diagram 7.3.14 Global theme park attendance per global population (all ages and under 65), 2006 to 2019



Sources: Aecom Global Attractions Reports, 2006 to 2019; World Bank Population Statistics, 2006 to 2019

7.3.166 A comparison of provision in proportion to the residential population (all ages) can give an idea of provision for each country. Table 7.3.52 shows the count of the global parks as identified by Aecom, and the population of each country, with the ratio of global theme parks per million population. It can be seen that Hong Kong has the highest rate of provision at 0.27, and China the lowest at 0. The US, Japan and France all have 0.03 per million population, putting them on par but towards the lower end of the scale relative to other countries.

7.3.167 A country’s global park provision can also be compared to tourism international arrivals in the country, to give an idea of the ability for the country to serve its tourist population with the parks. It can be seen that Japan and South Korea have the highest rate of provision at 0.13 parks per million tourist international arrivals, followed closely by the US at 0.11. France has the lowest at 0.02. In reality, theme parks attract visitors from a variety of markets, and the penetration rates vary by theme park and by visitor category. These indicators are nevertheless indicative of the ranges of potential population and tourist numbers which can support theme parks of a global calibre.

7.3.168 Clearly, without even one global park, the UK is considerably undersupplied on both metrics. The UK’s population in 2019 was c. 67m and its tourism arrivals in 2018 were 36m. If its provision of theme parks were on par with the average provision across the

countries containing the top 25 global theme parks, it would have 2-3 theme parks.⁸⁷

Table 7.3.52 Global (top 25) theme park provision per million population and tourism arrivals

	Count of (top 25) global theme parks	Population (2019) (million)	Count per million population	Tourism - International Arrivals (2018)	Count per million arrivals
US	9	328	0.03	80	0.11
Japan	4	126	0.03	31	0.13
China	4	1,398	0.00	63	0.06
France	2	67	0.03	89	0.02
Hong Kong	2	8	0.27	29	0.07
South Korea	2	52	0.04	15	0.13
Germany	1	83	0.01	39	0.03
Netherlands	1	17	0.06	19	0.05

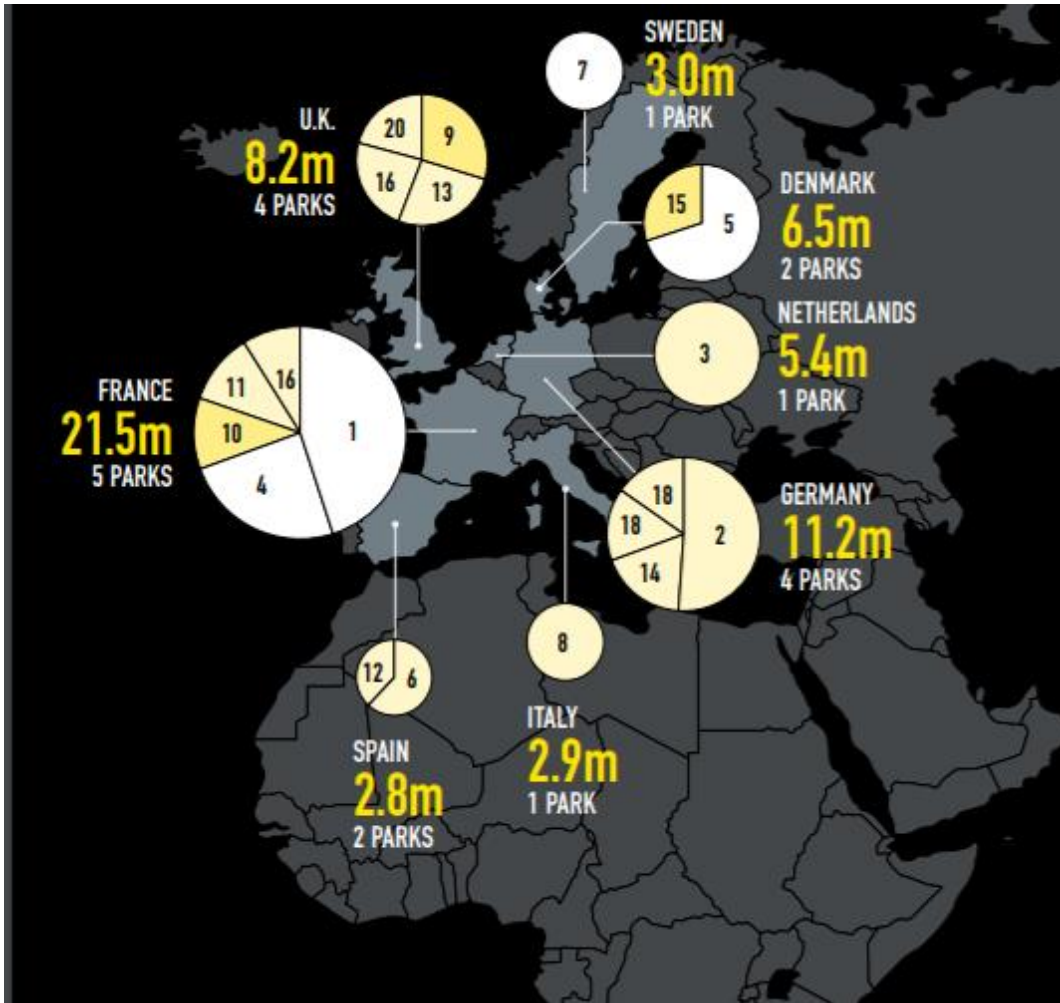
Sources: Aecom Global Attractions Report, 2019; World Bank Population Statistics, 2019; World Bank Tourism Arrival Statistics, 2019

Entertainment parks – EMEA

7.3.169 Once the geography considered is limited to Europe, Middle East and Africa (EMEA), England's theme parks represent more of a presence. According to Aecom, of the top 20 Europe, Middle East and Africa (EMEA amusement/theme parks in 2019 (by visitor number), four were in England.

⁸⁷ Calculated by applying the median park provision per population and tourism international arrival from Table 7.3.52 to relevant UK stats.

Diagram 7.3.15 Top 20 amusement parks in EMEA (2019)



Source: Aecom Global Attractions Report, 2019

7.3.170 Taking the same metrics as above for the global theme parks, Table 7.3.53 outlines the top 20 EMEA parks for million population (all ages) and million international tourism arrivals. As can be seen, the UK fares about average on provision per million population at 0.06, lower than France, Sweden and Denmark but on par with the Netherlands and higher than Spain, Germany and Italy. In terms of provision per tourism international arrivals, the UK ranks third of the eight countries, only behind Denmark and Sweden. This latter metric is less relevant in this context, however, as the UK’s current theme parks are predominantly catering to the domestic rather than international tourism market.

Table 7.3.53 Top 20 EMEA park provision per million population and tourism arrivals

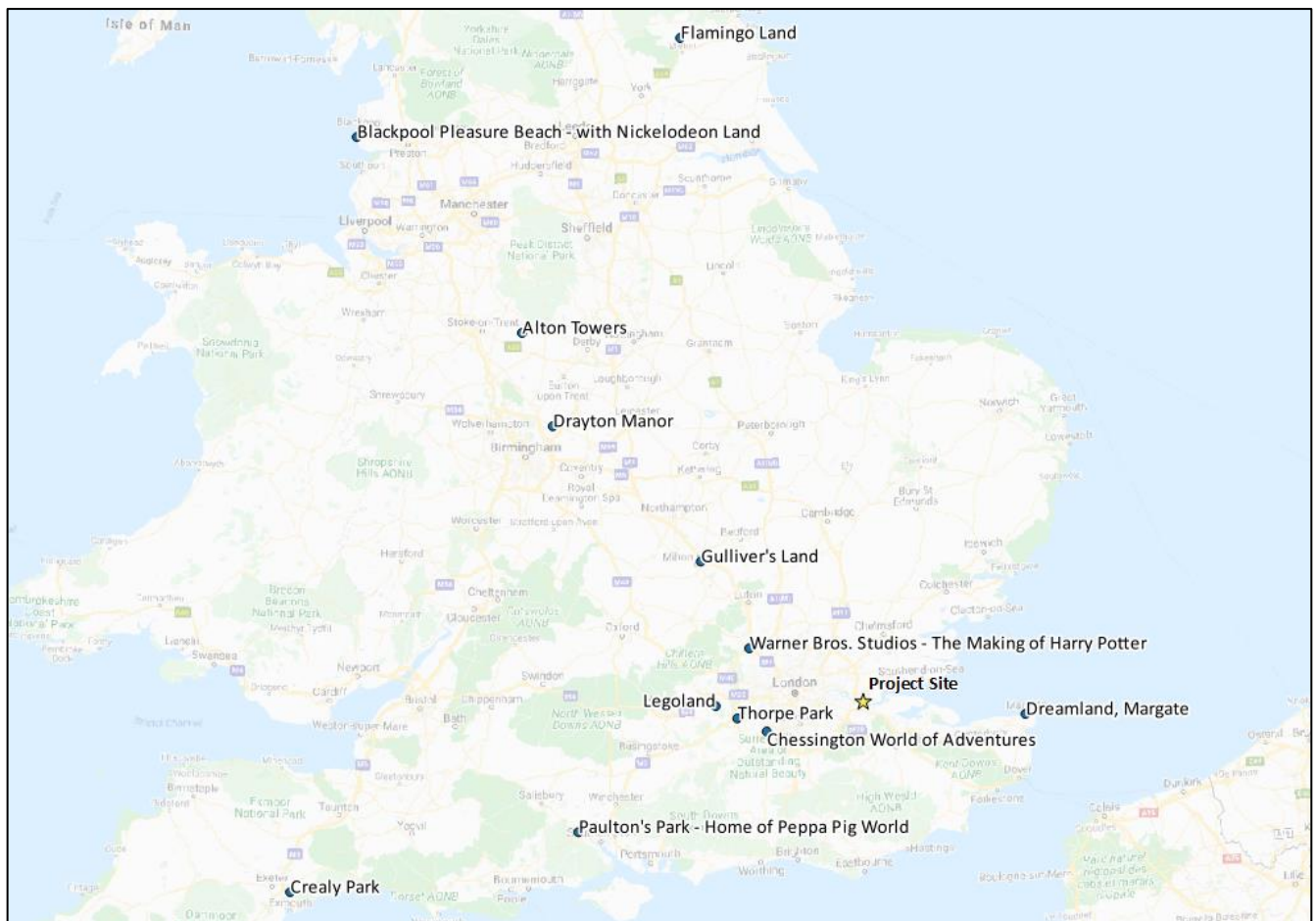
Country	Count of (top 20) EMEA theme parks	Population (2019) (million)	Count per million population	Tourism - International Arrivals (2018)	Count per million arrivals
UK	4	67	0.06	36	0.11
France	5	67	0.07	89	0.06
Spain	2	47	0.04	83	0.02
Italy	1	60	0.02	62	0.02
Germany	4	83	0.05	39	0.10
Netherlands	1	17	0.06	19	0.05
Denmark	2	6	0.34	13	0.16
Sweden	1	10	0.10	7	0.13

Sources: Aecom Global Attractions Report, 2019; World Bank Population Statistics, 2019; World Bank Tourism Arrival Statistics, 2019.

Entertainment parks – UK

7.3.171 Diagram 7.3.16 shows the UK's top 10 attractions (by visitor number), where the top four resorts are those noted by Aecom. Table 7.3.54 provides information regarding visitor numbers and ticket prices at each (where known).

Diagram 7.3.16 Top attractions in the UK



Sources: Volterra; Googlemaps

7.3.172 Table 7.3.54 shows that, of those with known visitor numbers, Legoland resort attracted the highest number of visitors at 2.4m (notably, only half the lowest visitor number seen in the top 25 global attractions - 4.7m at Chimelong, China). All of the top four attractions are resorts owned and operated by the same party – Merlin Entertainments. The ‘Merlin Annual Pass’ enables visitors to visit any Merlin resorts over the course of the membership, and therefore the visitor numbers are also likely to be inter-related by nature of this fact.

7.3.173 Also close to the Project Site is Margate Dreamland on the very eastern tip of Kent, approximately 60 minute drive from the Project Site. In 2019, visitor numbers reached the highest they had been at 650,000.⁸⁸ There is also Paulton’s Park (Peppa Pig World) in Southampton, approximately 110 minute drive from the Project Site, which consistently attracts over 1,000,000 visitors each year.⁸⁹

⁸⁸ Retrieved from <https://interpark.co.uk/dreamland-margate-enjoys-record-breaking-year/>. Accessed July 2020.

⁸⁹ Retrieved from <https://blooloo.com/features/paultons-park-peppa-pig-world-mancey/> Accessed July 2020

7.3.174 Annual visitor numbers are not available for Warner Bros. Studios - The Making of Harry Potter tour, which opened in 2012 (and has been the subject of three expansions since in 2015, 2017 and 2019). Booking must be made online in advance, and it is frequently booked up months in advance, reflecting high demand. Paulton's Park was attracting approximately 500,000 visitors per season, however with the opening of Peppa Pig World in 2011, visitors doubled to 1 million. There is no evidence that the opening of either the Harry Potter studio tour or Peppa Pig World had an adverse impact on the visitor numbers at the Merlin Entertainments' resorts. Both these examples indicate that, when a park with a well themed attraction is open, it can create a new visitor market.

Table 7.3.54 Top attractions in England

Attraction	2019 Visitors	(Uncongested) Drive time to site (mins)	Ticket price if bought on the day (2020)
Legoland	2.4m	73	£48 - £59 (off peak to super peak)
Alton Towers	2.1m	178	£58
Thorpe Park	1.9m	57	£55
Chessington World of Adventures	1.7m	47	£52
Flamingo Land	1.7m	236	£41.50
Paulton's Park Home of Peppa Pig World	1.0m	110	£38.50
Drayton Manor	0.9m	150	£39.50
Dreamland, Margate	0.7m	60	£16.00
Crealy Park	*	210	£15.00
Gulliver's Land, Milton Keynes	0.4m	90	£19.00
Warner Bros. Studios - The Making of Harry Potter	No annual figure available however capacity for 6,000 daily visitors and requirement for online booking only due to high demand and sold out days	66	£47.00**
Blackpool Pleasure Beach - with Nickelodeon Land	1.2m – 1.4m	270	£39.00

Sources: AECOM Global Attractions Attendance Report, 2019; Company websites; Google Maps. Note: * denotes missing data. **Must be booked online

Waterparks

- 7.3.175 According to Aecom, of the top 10 water parks in EMEA, none are in the UK.⁹⁰ The waterpark with the highest number of visitors in EMEA was Therme Erding, Germany, with 1.9 million visitors. There are, however, a number of smaller waterparks around the UK. Some of the most well-known include Waterworld in Stoke-on-Trent (approximately 400,000 visitors a year) and the Wave in Coventry offering six large slides, the UK's biggest wave pool, a lazy river, café, gym and spa.⁹¹ There is also the Alton Towers Waterpark in Staffordshire which includes wild water features, rapids and slides. Coral Reef Waterworld in Bracknell, which welcomed 460,000 visitors in 2018.⁹²
- 7.3.176 There are also a number of other holiday 'destination' Resorts which include some form of waterpark offering. These include the five Center Parcs locations across the UK, and Bluestone in Wales. Each of these have a variety of outdoor activities, watersports beaches or lakes, indoor water-based leisure as well as other organised activities.

Future baseline – market trends

- 7.3.177 In terms of global market trends, Forbes provide a summary of the 2018 Global Theme and Amusement Park Outlook report from the International Association of Amusement Parks and Attractions (IAAPA).⁹³ It reported that worldwide spending on theme parks surged by 5% between 2017 and 2018 to a record \$44.8bn, driven by the increased demand for 'experiences' rather than products. Much of the increased demand is coming from millennials who are keen to 'share' their experiences on social media platforms.
- 7.3.178 At the UK level these global trends are reiterated. A recent Deloitte report on UK leisure spending reports that the growth in social media has driven consumer appetite for the experiential. In 2017, UK spending on entertainment grew year on year by over 10% whilst spending on clothing grew only by 1.4% and on groceries by 3.8%.⁹⁴ Research by Mintel finds that 65% of British adults would spend their money on experiences rather than possessions, rising to 72% for millennials.⁹⁵
- 7.3.179 In terms of domestic tourism trends, recent research by Barclays suggests that there is a growing interest in the 'staycation' in Britain. They report that 55% of tourism businesses reported an increase in domestic tourism since 2017. According to the holidaymakers, the attraction of the staycation is driven by 34% convenience, 21%

⁹⁰ Aecom Global Attractions Report, 2019

⁹¹ Retrieved from <https://thewavecoventry.com/>. Accessed June 2020.

⁹² Retrieved from <https://www.bracknellnews.co.uk/news/17794658.bracknell-leisure-centre-coral-reef-visits/>. Accessed June 2020.

⁹³ Forbes, 'Experience Economy' Boosts Theme Park Spending To A Record \$45 Billion, 2018. Retrieved from <https://www.forbes.com/sites/csylv/2018/11/04/experience-economy-boosts-theme-park-spending-to-a-record-45-billion/#497730c329e4>. Accessed July 2020.

⁹⁴ Deloitte, Experience is everything: The UK leisure consumer, June 2019

⁹⁵ Mintel, Healthy, Ethical and Experiential: The Holy Trinity of British Consumer Spending, July 2019

desire to visit places they haven't before and 19% because of the affordability.⁹⁶ Merlin Entertainments state that the catchment for the short breaks market has increased from 2-3 hours drive time to 5 hours drive time.⁹⁷

Future baseline – Entertainment parks

- 7.3.180 According to Allied Market Research, the global theme park vacation market was valued at \$47.2 billion in 2018 and is anticipated to hit \$74.7 billion by 2026 (a CAGR of 6.0% from 2019 to 2026).⁹⁸ The IAAPA report (as summarised by Forbes) states that global attendance is set to increase steadily over the next few years and spending in line with it (estimated to grow at 6.5% annually to hit \$60.5 billion in 2022) as prices rise and new parks open. The report outlines a multitude of large global investments, including more than \$3bn in Universal Studios Beijing (expected opening 2021), 11 new Six Flags parks in China (the first opening in 2021) and a \$2.2bn project in Tokyo DisneySea including a new hotel (due to be completed 2022). In Europe, a \$2.3bn expansion project in Disneyland Resort Paris has begun, with phased launch beginning 2021. On the back of this European investment, the report estimates a 12% increase in attendance at European theme parks between 2017 and 2022 to 192m.⁹⁹
- 7.3.181 In the UK, the Merlin Group was bought in 2019 by the owner of Legoland, who aims to expand the company reach to Asia (especially China) and South Korea. Domestic strategy to increase visitor numbers includes adding further on-site, themed accommodation to their resorts to help increase catchment.¹⁰⁰ Recently, permission was sought to provide 102 accommodation pods at Alton Towers, creating 45 part time jobs.¹⁰¹ The group also plan to add more Midway attractions (indoor attractions where guests typically spend one or two hours located in city centres or malls).¹⁰²
- 7.3.182 Also in the UK, Therme in Manchester has recently been approved and is due to open in 2023. Costing £250m and covering 28 acres, it will have a wellbeing focus with mineral baths, steam rooms, sauna, fitness classes etc, as well as a family zone featuring waterslides, a wave pool, and indoor and outdoor pools. It is expected to attract 2

⁹⁶ Retrieved from <https://home.barclays/news/2019/05/barclays-research--the--staycation--is-on-for-british-holidaymak/>. Accessed June 2020.

⁹⁷ Merlin Entertainments, Introduction to Merlin Entertainments, March 2017. Retrieved from <https://www.merlinentertainments.biz/media/1185/introduction-to-merlin-presentation-mar-2017-final-6.pdf>. Accessed July 2020.

⁹⁸ Retrieved from <https://www.globenewswire.com/news-release/2020/04/08/2013686/0/en/Global-Theme-Park-Vacation-Market-Is-Expected-to-Reach-74-7-Billion-by-2026-Says-AMR.html>. Accessed July 2020.

⁹⁹ Forbes, 'Experience Economy' Boosts Theme Park Spending To A Record \$45 Billion, 2018. Retrieved from <https://www.forbes.com/sites/csylv/2018/11/04/experience-economy-boosts-theme-park-spending-to-a-record-45-billion/#497730c329e4>. Accessed July 2020.

¹⁰⁰ Retrieved from <https://www.merlinentertainments.biz/about-us/our-strategy/>. Accessed July 2020.

¹⁰¹ Retrieved from <https://www.stokesentinel.co.uk/news/local-news/alton-towers-set-win-permission-1646189>. Accessed July 2020.

¹⁰² Retrieved from <https://www.merlinentertainments.biz/about-us/our-strategy/>. Accessed July 2020.

million visitors per year.¹⁰³ Also due to open in 2023 is the Elysium in Bournemouth, featuring a large waterpark and ‘water-based spa’. Some attractions will also include virtual reality and augmented reality technology. Costing £160m and covering 75 acres, the scheme has a 4,000+ daily capacity and is expecting over 1 million visitors yearly.¹⁰⁴ Finally, the Waterworld Group plan to invest £10m in the Waterworld site (in Stoke on Trent) to extend their offering, including a new M Club Spa & Fitness Club, a new trampoline park, new water rides and attractions and the arrival of an indoor adventure golf concept called ‘Adventure Mini Island Golf’. Visitor numbers are expected to exceed 3-4 million people.¹⁰⁵

- 7.3.183 The earlier future baseline (see Table 7.3.43) found that national population is expected to grow from 56 million in 2018 to 57 million in 2022 (+2% from 2018 value), to 57.6 million in 2023 (+3%) 58.1m in 2025 (+4%), 58.3m in 2026 (+4%), 59.2m in 2030 (+6%) and 61m in 2038 (+9%). Population is expected to grow in the CSA at a faster rate than the national average in all assessment years. This means that, along with national growth in similar trade offerings, it is likely that there will be increased national demand for such offerings as well. This is particularly true as the millennial cohort increase their earnings and spending power, as Experian note.¹⁰⁶
- 7.3.184 The Tourism Sector Deal states that, in 2018, the UK attracted 38 million international visitors, who added £23 billion to the economy, making tourism one of the country’s most important industries and the third largest service export. Current forecasts predict the sector will deliver a 23% increase in inbound visitors by 2025, and domestic tourism is also set to increase by an estimated 3% per annum until 2025.¹⁰⁷ These forecasts are taken from a 2013 Deloitte report, UK tourism GDP was expected to grow by 3.8% per year (CAGR) through to 2025; 0.8% higher than the UK (total GDP). This would equate to £257.4bn in 2025 (up from £126.9bn in 2013). Inbound tourism was expected to be the largest driver, with 6% demand growth per year (compared to 3% domestic and 1.5% outbound demand).¹⁰⁸

COVID-19

- 7.3.185 The pandemic has had a severe impact on the tourism industry as a whole, both international and domestic. The United Nations World Tourism Organisation (UNWTO) recently reported that the near complete lockdown meant that international tourist numbers in May 2020 were 98% less than May the previous year. There was also a 56% year-on-year drop in tourist arrivals between January and May 2020; equating to

¹⁰³ Retrieved from <https://www.thermegroup.com/planning-approved-for-therme-manchester/#:~:text=Therme%20Manchester%20will%20combine%20hundreds,before%20seen%20in%20the%20UK.&text=The%20central%20focus%20of%20the,the%20national%20flower%20of%20England>. Accessed June 2020

¹⁰⁴ Retrieved from <https://elysiumwaterpark.com/>. Accessed June 2020.

¹⁰⁵ Retrieved from <https://www.businessleader.co.uk/waterworld-group-announces-go-ahead-10m-expansion-plan/35925/>. Accessed June 2020.

¹⁰⁶ Experian, Millennial Growth: Spending Power Index

¹⁰⁷ Department for Business, Energy and Industrial Strategy, Department for Digital, Culture, Media and Sport, Policy Paper: Tourism Sector Deal, June 2019

¹⁰⁸ Deloitte, Oxford Economics, Tourism: jobs and growth: The contribution of the tourism economy in the UK

approximately 300 million tourists and \$320bn lost in international tourism receipts – more than three times the loss during the 2008/09 crisis. However, despite this highly adverse shock, most members of the UNWTO Panel of Tourism Experts expect international tourism to recover by the second half of 2021.¹⁰⁹

- 7.3.186 Considering UK international tourism, Visit Britain's¹¹⁰ revised inbound central scenario outlook for 2020 (as of August 25th), is for a decline of 73% in visits to 11.0 million and a decline of 79% in spending to £6.0 billion. This would represent a loss vs the pre-COVID forecast of 30.7 million visits and £24.0 billion spending.¹¹¹
- 7.3.187 For UK domestic tourism, the Visit Britain central scenario for domestic tourism spending in Britain is £46.8bn in 2020, down 49% compared to 2019 when spending by domestic tourists in Britain was £91.6bn. This comprises £12.6bn from overnight tourism, down from £24.7bn in 2019, and £34.2bn from day trips, down from £67.0bn in 2019. This is a decline of 49% for both overnights and leisure day trips, although the pattern of the recovery will be different. This represents a loss of £44.9bn (£12.1bn from overnights and £32.8bn from day trips) – greater than the loss from inbound tourism in absolute value terms, although lower in percentage terms.¹¹²
- 7.3.188 It is notable that, whilst Visit Britain have released this quantitative tourism forecasts, they emphasise that they are based on several assumptions around uncertainties which could change as 2020 progresses, and that the longer-term impact and path to recovery depend, apart from the progression of the pandemic and treatments/vaccines, on wider demand (especially economic) and supply factors. So, whilst these forecasts cannot be relied upon to provide a picture of future tourism, they are still useful to consider as a potential future scenario.
- 7.3.189 For theme parks specifically, the majority were forced to close given the lockdown measures and health concerns. When they have reopened (generally between July and August 2020), it is with many safety precautions in place, including reduced operating capacity to allow for social distancing measures,¹¹³ mandatory face masks and

¹⁰⁹ World Tourism Organisation, 2020, IMPACT OF COVID-19 ON GLOBAL TOURISM MADE CLEAR AS UNWTO COUNTS THE COST OF STANDSTILL. Retrieved from <https://www.unwto.org/news/impact-of-covid-19-on-global-tourism-made-clear-as-unwto-counts-the-cost-of-standstill>. Accessed September 2020

¹¹⁰ Visit Britain, 2020, 2020 tourism forecast

¹¹¹ This central scenario assumes that a vaccine will not be widely available during 2020. It assumes that the UK will not go back to the April-June situation of national lockdown and near-zero international travel although it is consistent with some local lockdowns being imposed. The forecast assumes that quarantine restrictions are, in aggregate, eased gradually over the rest of the year but even by the end of 2020 it assumes that some European and most non-European visitors are likely to still face restrictions on arrival.

¹¹² Two specific assumptions made are: (1) No major second wave of the virus that would necessitate a renewed national lockdown; (2) By early 2021 we are unlikely to be back to baseline (pre-COVID) levels in any purpose/category. This is due to economic factors, supply loss, some continued level of social distancing, and traveller sentiment.

¹¹³ For example, Disneyland Shanghai reopened with 30% of its usual 80,000 capacity

temperature checks, and multiple hand sanitisation stations.¹¹⁴ Merlin Entertainments also offered a reduced number of tickets, with enhanced cleaning measures and employees required to wear personal protective equipment (PPE).¹¹⁵ Paulton's Park introduced virtual queuing to help with social distancing.¹¹⁶

- 7.3.190 It is notable that many of these parks don't operate anywhere near to full capacity at most times throughout the year – with only peak seasons such as Christmas getting close. One article states that daily visitors to Disneyland are approximately 51,000 (according to Themed Entertainment Association) where a 50% 'cap' on capacity equates to 42,500 daily visitors, and Disney California Adventure attracts approximately 27,000 daily visitors where a 50% 'cap' on capacity equates to 25,000; both 'caps' bring the capacity limit fairly close to what demand is already seen.¹¹⁷
- 7.3.191 However, given a lack of recent visitor data, it is too soon to say if the pandemic has had an impact on long-term demand for the parks. As with many other elements of life before COVID-19, it may be that latent demand remains strong and, once a vaccine is discovered such that the health risks are minimised, people will be ready to attend again. There are arguments that first time guests will postpone their trip in order to get the 'full experience' whilst repeat attendees welcome the opportunity to visit with less queues.¹¹⁸
- 7.3.192 In terms of future construction, Disney has halted \$900 million in theme park refurbishment and construction projects as a result of the COVID-19 pandemic. Universal have also halted work on its Epic Universe theme park planned for 2023. Work still continues on more than \$300 million in theme park construction projects already underway.¹¹⁹

¹¹⁴ The Guardian, 2020, Disney reopens its Shanghai theme park, with many restrictions. Retrieved from <https://www.theguardian.com/film/2020/may/11/coronavirus-disney-reopens-shanghai-theme-park-with-many-restrictions>. Accessed September 2020.

¹¹⁵ Interpark, 2020, ENTERTAINMENTS' ATTRACTIONS IN ENGLAND WILL REOPEN FROM JULY 4. Retrieved from <https://interpark.co.uk/merlin-entertainments-attractions-in-england-will-reopen-from-july-4/>. Accessed September 2020.

¹¹⁶ Andover Advisor, 2020, Paultons Park to offer virtual queuing for social distancing management. Retrieved from <https://www.andoveradvertiser.co.uk/news/18541944.paultons-park-offer-virtual-queuing-social-distancing-management/>. Accessed September 2020.

¹¹⁷ The OCR, 2020, What an attendance cap could mean for crowded Disney parks in the coronavirus era. Retrieved from <https://www.oregister.com/2020/05/22/what-an-attendance-cap-could-mean-for-crowded-disney-parks-in-the-covid-19-era/>. Accessed September 2020.

¹¹⁸ Travel Market Report, 2020, What Is the Post-COVID-19 Theme Park Experience Like? Retrieved from <https://www.travelmarketreport.com/articles/What-Is-the-Post-COVID-19-Theme-Park-Experience-Like>. Accessed September 2020

¹¹⁹ Bloolooop, 2020, How much are theme parks losing during the COVID-19 pandemic? Retrieved from <https://bloolooop.com/features/theme-park-financial-impact-covid-19/>. Accessed September 2020.

Potential effects of visitors and workers on local accommodation options and the housing market

7.3.193 There will be indirect effects on housing supply in the CSA as a result of the London Resort. This will include the impact both on quantum of housing demand (as a result of the increased workforce at the London Resort who require somewhere to live) and the impact on type of housing demanded. While the employment opportunities created by the London Resort will have a positive economic impact on the area, the workers and visitors attracted to the area may increase demand for housing, having an impact on current housing need (in terms of price, tenure, size etc) as well as the demand that arises from the London Resort. This will include potential impacts on affordability, additional housing need and release of land for housing.

Housing stock

7.3.194 According to MHCLG, there were 158,600 dwellings in the CSA, 84% of which were in the private sector, comparable to 83% across England. The ONS estimate that, in the CSA, this 84% is split between 68% owner occupied (compared to 63% in England) and 16% are in the private rented sector (compared to 20% in England).¹²⁰ MHCLG also note that 11% of CSA dwellings are local authority owned, higher than the 7% across England. By contrast, only 4% of CSA dwellings are private registered providers, compared to 10% in England.

Table 7.3.55 CSA dwelling stock by tenure (local authority owned, private registered provider, other public sector, owner occupied and private rented sector), 2019

	Total dwellings	Local authority owned	Private registered provider	Other public sector	Owner occupied	Private rented sector
Dartford	47,300	4,200	2,000	0	35,100	6,000
		9%	4%	0%	74%	13%
Gravesham	43,569	5,689	1,771	7	29,133	6,969
		13%	4%	0%	67%	16%
Thurrock	67,734	9,847	2,045	0	43,991	11,851
		15%	3%	0%	65%	17%
CSA	158,600	19,800	5,800	10	108,200	24,800
		11%	4%	0%	68%	16%
England	24,414,000	1,587,200	2,561,000	41,700	15,338,600	4,827,300
		7%	10%	0%	63%	20%

Sources: MHCLG, *Live tables on dwelling stock (including vacant properties)*, Table 100 *Dwelling stock: Number of Dwellings by Tenure and district: England; 2019*; ONS, *Subnational dwelling stock by tenure estimates, England, 2019*

7.3.195 According to MHCLG, there are 3,500 vacant dwellings in the CSA, equating to 2.2% of

¹²⁰ These research outputs are not official statistics on dwelling stock by tenure.

total dwellings. This is slightly lower than England, which is reported to have 648,100 vacant dwellings, or 2.7% of total.¹²¹ In the CSA, there were 155 vacant local authority owned dwellings, equivalent to 0.8% of total local authority owned dwellings. This is far lower than the 1.5% vacancy across all local authority owned dwellings in England. For private registered provider dwellings, the CSA is reported to have 45 (0.8% of total dwellings) compared to 1.5% at the national level. Vacant dwellings for other public sector dwellings was negligible.

Table 7.3.56 Vacant dwellings, 2019

	Total		Local authority owned		Private registered provider	
Dartford	1,060	2.2%	22	0.5%	22	1.1%
CSA	3,500	2.2%	155	0.8%	45	0.8%
England	648,100	2.7%	24,000	1.5%	38,500	1.5%

Source: MHCLG, *Live tables on dwelling stock (including vacants)*, Table 615 All vacant dwellings by local authority district, England, 2019

7.3.196 Table 7.3.56 does not provide further tenure breakdowns for vacant dwellings. However, the English Housing Survey reports that approximately 10% of PRS dwellings across England are vacant¹²² and that this has been the case since early 2000s.¹²³ Furthermore, given the large proportion of owner occupied housing, it can be expected that total dwelling vacancy (2%) will be highly representative of owner occupied vacancy.

House prices and affordability

7.3.197 For the affordability baseline, London has been excluded from the RCA due to high earnings, median house prices, PRS rents and affordability ratios potentially skewing the data.

Owner occupied

7.3.198 In 2019, the median house price in the CSA was £296,000, lower than the SRCA (£304,000) and RCA (£306,000), but higher than the national average (£240,000). Median house prices since 2010 have grown by 71% in the CSA, far faster than growth in the SRCA (55%), RCA (49%) and England (33%).

7.3.199 The affordability ratio was 9.1 in 2019 in the CSA, meaning that a CSA resident on a median wage would need just over nine years' worth of income to afford a house in the area. This is slightly lower than that of the SRCA (9.2) and RCA (9.4) but higher than the

¹²¹ MHCLG, *Live tables on dwelling stock (including vacants)*, Table 615 All vacant dwellings by local authority district, England, 2019

¹²² English Housing Survey, 2018

¹²³ MHCLG, 2011, *Dwelling Stock Estimates: 2011 England*.

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/6868/2039750.pdf

England average (7.8). As with the median house prices, the affordability ratio in the CSA has grown far faster than all other geographical comparators.

7.3.200 Typically, mortgage lenders will loan four to five times a residents' earnings. Therefore, a couple who reside in the CSA and are both on the median wage for the area (earning a combined £65,100) would still require a house deposit of £35,700 if they are able to borrow four times their earnings. This is lower than the deposit required in the SRCA (£40,000) and RCA (£45,000), but higher than that required nationally, where a mortgage of four times joint earnings would cover the cost of the house. In all geographical areas, a mortgage of five times joint earnings would cover the cost of the house. It should be noted, however, that this affordability pressure will be further heightened for single earning households or households where earnings are below the average levels. There is a generally agreed housing crisis across the country, with a particular focus on London and the South East, where houses are becoming increasingly unaffordable for first time buyers.

7.3.201 Overall, the affordability baseline finds that, whilst houses in the CSA are very slightly more affordable than the SRCA and RCA, they are less affordable than the England average, and prices have been growing much faster, as has the affordability ratio.

Table 7.3.57 Median house price, affordability ratio and house deposits required

	Median House Price		Affordability ratio		Median joint earnings 2019	Deposit required after mortgage	
	2019	Change since 2010	2019	Change since 2010		4 times joint earnings	5 times joint earnings
Dartford	£180,000	73%	9.3	49%	£67,200	£42,200	-£25,000
Gravesham	£175,000	66%	8.9	48%	£65,000	£29,900	-£35,100
Thurrock	£165,000	74%	9.1	55%	£63,100	£35,200	-£28,000
CSA	£296,200	71%	9.1	51%	£65,100	£35,700	-£29,400
SRCA	£303,800	55%	9.2	32%	£65,900	£40,000	-£25,900
RCA	£306,200	49%	9.4	28%	£65,200	£45,300	-£20,000
England	£240,000	33%	7.8	14%	£61,300	-£5,300	-£66,600

Source: MHCLG, House price to residence-based earnings ratio, 2019

Private Rented Sector

7.3.202 The table below shows the private rental market statistics as reported by the VOA in FY18. In the CSA, median rents were £900, far higher than the SRCA (£838), RCA (£835) and England (£695). This is mainly driven by Dartford, where median rent was reported at £950. Rents vary across the number of bedrooms in all study areas. The CSA has a higher median monthly rent than all study areas for all house sizes except four bedrooms, where the RCA is higher than the CSA.

Table 7.3.58 Median monthly rents (£), FY19

	All	Room	Studio	1 bed	2 bed	per room	3 bed	per room	4 bed	per room
Dartford	950	*	625	750	950	475	1,200	400	1,575	394
Gravesham	850	425	575	675	850	425	1,050	350	1,350	338
Thurrock	900	650	605	725	900	450	1,150	383	1,400	350
CSA	900	538	602	717	900	450	1,133	378	1,442	360
SRCA	838	475	553	668	837	419	1,024	341	1,413	353
RCA	835	426	560	675	825	413	998	333	1,500	375
England	695	390	575	615	675	338	760	253	1,320	330

Note* Denotes unavailable data

Source: Valuation Office Agency, PRS rents by administrative area, FY19

7.3.203 Comparing these rents to 2019 residence based earnings, this baseline has estimated affordability using the ONS benchmark which found that PRS rents were considered affordable if they were less than 30% of gross household income,¹²⁴ where earnings has been used here to proxy household income. In the CSA, PRS rents (all bedroom types) accounted for 33% of monthly earnings, higher than the affordability benchmark of 30%. It is also a higher proportion in the CSA than the SRCA and RCA (30%) England (27%).

Table 7.3.59 FY19 PRS rents against 2019 monthly earnings

	2019 earnings	Monthly earnings	All PRS rents	Proportion of monthly income spent on rent
Dartford	33,600	2,800	950	34%
Gravesham	32,500	2,700	850	31%
Thurrock	31,600	2,600	900	34%
CSA	32,600	2,700	900	33%
SRCA	33,000	2,700	838	30%
RCA	32,600	2,700	835	31%
England	30,700	2,600	695	27%

Sources: Valuation Office Agency, PRS rents by administrative area, FY19; MHCLG, House price to residence-based earnings ratio, 2019

Housing need

7.3.204 Table 7.3.60 shows that the CSA has seen substantial growth in the number of rough sleepers between 2010 and 2018 (1300%) compared to the RCA (175%) and England

¹²⁴ ONS, Percentage of renters' median monthly household income spent on median monthly rent, by region, England, FYE 2018

(165%) growth over the same period, although the CSA growth was starting from a very low base of just 3 rough sleepers in 2010. The large CSA growth was mainly driven by Gravesham, which saw 21 additional rough sleepers over the period.

7.3.205 In 2018, the CSA had 0.30 rough sleepers per 1,000 households, higher than the RCA (0.21) and England (0.24) rates. This rate, too, saw high growth in the CSA between 2010 and 2018 (1461%) compared to RCA (147%) and England (151%).

Table 7.3.60 Rough sleepers, 2010 and 2018

	Rough sleepers			Rough sleepers per 1,000 households		
	2010	2018	growth	2010	2018	growth
Dartford	0	12	*	0.00	0.27	*
Gravesham	1	21	2000%	0.03	0.49	1856%
Thurrock	2	9	350%	0.03	0.14	318%
CSA	3	42	1300%	0.02	0.30	1461%
RCA ¹²⁵	516	1418	175%	0.08	0.21	147%
England	1768	4677	165%	0.10	0.24	151%

Source: Street counts and estimates of rough sleeping in England, Autumn 2010-2018

7.3.206 Between 2010 and 2017, the number accepted as being homeless grew by 46% to 395 residents in the CSA, faster than the growth across England over the same period (28%). This was mainly driven by Dartford and Thurrock, which saw high growth compared to a contraction in Gravesham. The CSA had 2.60 accepted as homeless per 1,000 households – higher than the England equivalent (2.45). The rate per 1,000 households also grew faster (36%) than England (21%).

Table 7.3.61 Number accepted as being homeless (per 1,000 households), 2010 and 2017

	Number accepted as being homeless			Number accepted as being homeless per 1,000 households		
	2010	2017	growth	2010	2017	growth
Dartford	86	148	72%	2.20	3.40	54%
Gravesham	77	31	-60%	1.93	0.73	-62%
Thurrock	107	216	102%	1.74	3.29	89%
CSA	270	395	46%	1.92	2.60	36%
England	44,159	56,595	28%	2.03	2.45	21%

Source: Local Authority Homelessness Statistics (England), 2019

7.3.207 In 2017, there were 325 CSA residents in temporary accommodation; 195% growth from the 2010 figure of 110, again driven by Dartford and Thurrock. This was faster

¹²⁵ For baseline information on rough sleeping, London has been excluded from the RCA to avoid biasing the estimates given the high rates seen in the capital.

growth than was seen across England (67%) over the same period. There were 2.14 residents in temporary accommodation per 1,000 households in the CSA which is smaller than the rate for England (3.50). However, the growth since 2010 in the rate was 174%; far higher than the growth across England (58%).

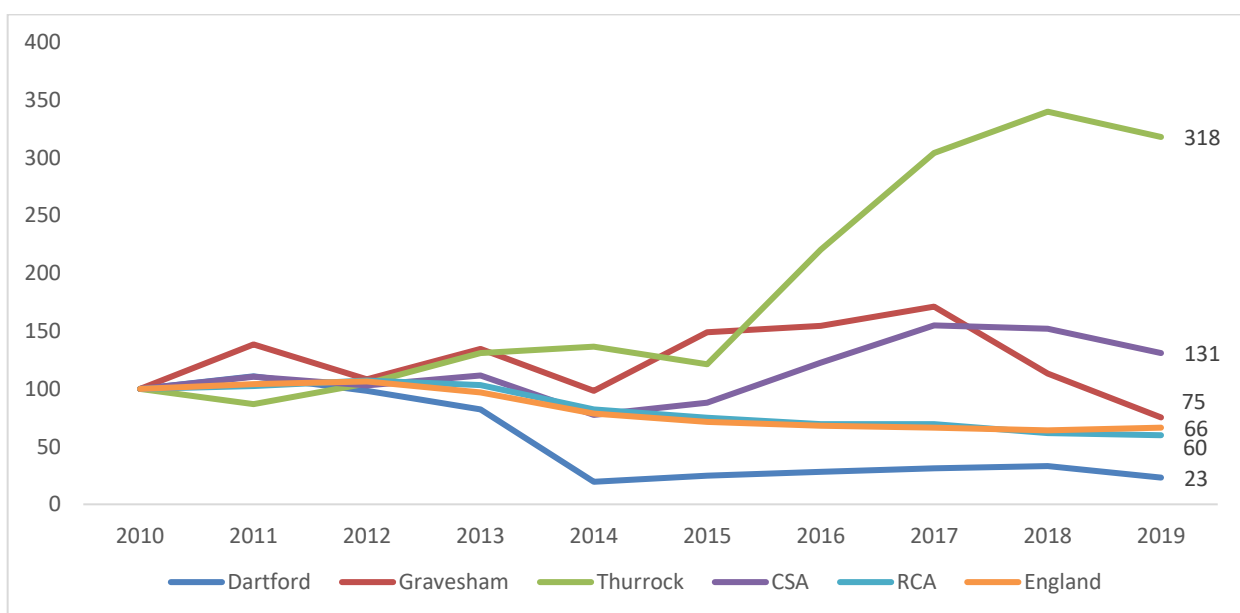
Table 7.3.62 Number in temporary accommodation (per 1,000 households), 2010 and 2017

	Number in temporary accommodation			Number in temporary accommodation per 1,000 households		
	2010	2017	growth	2010	2017	growth
Dartford	46	109	137%	1.18	2.50	113%
Gravesham	22	71	223%	0.55	1.67	203%
Thurrock	42	145	245%	0.68	2.21	224%
CSA	110	325	195%	0.78	2.14	174%
England	48,236	80,657	67%	2.22	3.50	58%

Source: Local Authority Homelessness Statistics (England), 2019

7.3.208 Diagram 7.3.17 shows the index of households on local authority waiting lists between 2010 and 2019. As can be seen, many geographies have experienced decreases in their list sizes. However, Thurrock has seen a huge increase (+218%) which means that the CSA itself has also seen an increase (+31%) despite decreases in both Dartford (-77%) and Gravesham (-25%). England overall has seen a decrease of 33%.

Diagram 7.3.17 Index of households on local authority waiting lists (2010 = 100)



Source: MHCLG, Table 600: Numbers of households on local authorities' housing waiting lists, by district: England, 31 March 1997-2019. Note: RCA here excludes London so as not to skew the data

7.3.209 In 2019, there were 10,600 households in the CSA which were on the local authority waiting list, accounting for 54% of local authority dwellings – lower than that of England (73%). There is a slight difference between households and dwellings,¹²⁶ however household stock by tenure is not available so dwellings have been used as a proxy and it is assumed that the differences between households and dwellings are the same at a CSA and England level so that the two percentages are comparable.

Table 7.3.63 Households on Local Authority waiting lists as a proportion of Local Authority dwellings, 2019

	Households on LA waiting list (2019)	Growth since 2010	LA dwellings	Households as a % of LA dwellings
Dartford	785	218%	4,200	19%
Gravesham	1,600	-77%	5,700	28%
Thurrock	8,300	-25%	9,800	84%
CSA	10,600	31%	19,800	54%
England	1,157,300	-34%	1,587,200	73%

Sources: MHCLG, Table 600: Numbers of households on local authorities' housing waiting lists, by district: England, 31 March 1997-2019; MHCLG, Live tables on dwelling stock (including vacants), Table 100 Dwelling stock: Number of Dwellings by Tenure and district: England; 2019

7.3.210 This aligns with consultation feedback from Dartford Borough Council who note that whilst the borough meets its local housing need requirement, much of the new housing is being taken up by people moving out of London and is not affordable to many local residents. In 2019, 72 people migrated from London to Dartford, making Dartford the second most likely place for Londoners to migrate to (after Thurrock).¹²⁷ The total annual Dartford population change has increased from 400 between 2001-2002 to 2,900 between 2018-2019. The components of change are natural change and net migration. In the last 17 years, net migration has increased as a proportion of the total change, from 35% to 73%. Annual net migration has increased by 950% compared to 167% increase in natural change.

Table 7.3.64 Components of population change (natural change and migration) in Dartford between 2001-02 and 2018-19

	2001 – 2002	2018-2019	Change	
			Unit	%
Total change	400	2,900	2,500	625%
<i>Of which (% total)</i>				
Natural change	300 (65%)	800 (27%)	500	167%

¹²⁶ A household is one or more people who live in the same dwelling and share meals and living spaces. One or more households can exist in the same dwelling if meals and living space are not shared.

¹²⁷ ONS, 2020, Internal migration: year ending June 2019 (2018 local authority boundaries) - detailed estimates by origin and destination local authorities, age and sex

	2001 – 2002	2018-2019	Change	
			Unit	%
Net migration	200 (35%)	2,100 (73%)	1,900	950%

Source: Kent County Council, 2020, *What is causing Kent's population growth*

- 7.3.211 Furthermore, the Dartford and Ebbsfleet residential needs assessment¹²⁸ shows that there has been disproportionately high growth in private renting in Dartford (34% between 2012 and 2017) compared to the South East and England (both 22%). More locally, there is a high dependency on private renting in Swanscombe compared to Dartford and KCC area.¹²⁹
- 7.3.212 The Gravesham Strategic Housing Markets Assessment¹³⁰ notes that Gravesham sits in a dynamic economic context with strong regional transport connections and inevitable influence from London, all of which influence business location, labour market and housing market. However, despite this, the borough has experienced greater economic challenges than some neighbouring areas. Between 2001 and 2014, the assessment notes that many of the 30-44 age working cohort has moved out of the area for employment reasons, taking many of the 10-14 age groups (their children) with them. This suggests a decrease in the economically active population, coupled with an increase of the 60+ age group. This could affect housing markets by increasing the propensity of under-occupancy occurring among older people with more bedrooms in the home than they require. However, in 2014, there was a positive net migration in these age groups, contributing to a recent reversal of long term trends of negative domestic migration. This could reflect a wider trend of reduced emigration levels since the recession. Main contributors to net in-migration to Gravesham are London boroughs, whereas net migration losses tend to be to other neighbouring Kent authorities. London's increasing affordability pressures are likely to be contributing to this trend of migration from London to Gravesham. On top of this, there are constraints on mortgage finance which are stated likely to remain at least in the short term. This significantly impacts the ability of households to purchase housing.
- 7.3.213 Similar to Dartford, the South Essex Strategic Housing Market Assessment¹³¹ notes high population growth levels in Thurrock, coinciding with an increased flow from London. Thames Gateway South Essex (TGSE)¹³² has a high level of containment, implying that people who work in the area are also likely to live in the area. However, Thurrock shows a lower containment of labour force compared to the other TGSE local authorities as it draws a large labour force from London. Between 2001 and 2014, Thurrock completed 6,303 dwellings; 5,722 lower than their target and the largest shortfall to target of all TGSE authorities.

¹²⁸ Dartford Borough Council, 2019, Dartford and Ebbsfleet Residential Needs Assessment

¹²⁹ Dartford Borough Council, 2018, Swanscombe Area Profile

¹³⁰ Gravesham Borough Council, Strategic Housing Market Assessment, June 2016

¹³¹ South Essex Strategic Housing Market Assessment, May 2016

¹³² The authorities of Basildon, Castle Point, Rochford, Southend-on-Sea, and Thurrock

- 7.3.214 The assessment¹³³ also summarises market signals for TGSE and neighbouring authorities, which include Dartford and Gravesham, where a low rank of 1 implies the greatest worsening on the indicator and a rank of 14 implies the lowest. Overall, Dartford ranks 1 on four of the seven indicators (mean and lower quartile change in rent for 2 beds between 2011 and 2014, overcrowding and concealed families between 2001 and 2011). Dartford only rank above 3 on one indicator (mean change in house prices 2011 – 2014: ranked 11). Gravesham ranks 2 on overcrowding between 2001 and 2011. Thurrock ranks 2 on affordability between 2001 and 2013 and does not rank higher than 7 on any indicator. Overall, this shows that Dartford and Thurrock in particular have come under intense pressure in the last few years.
- 7.3.215 During pre-application consultation, DBC said that 89 residents were accepted as being homeless in 2019/20, down from 102 in 2018/19. Homeless applications have risen significantly over the last ten years, but acceptances have fallen, due mainly to increased preventative measures being put in place. As of 18 March 2020 there were 82 households in temporary accommodation (TA). On June 17 2020, there were 136 households in TA, an increase of 54 households. Of these, 41 were/are in shared accommodation and 18 were/are in self-contained units. Move on placements are increasingly outside the borough as market rents remain high compared to local housing allowance levels, and combined issues of parental exclusions, domestic abuse and antisocial behaviour making it difficult to secure suitable TA. The last rough sleeper count in November 2019 identified 13 rough sleepers on the streets of Dartford.

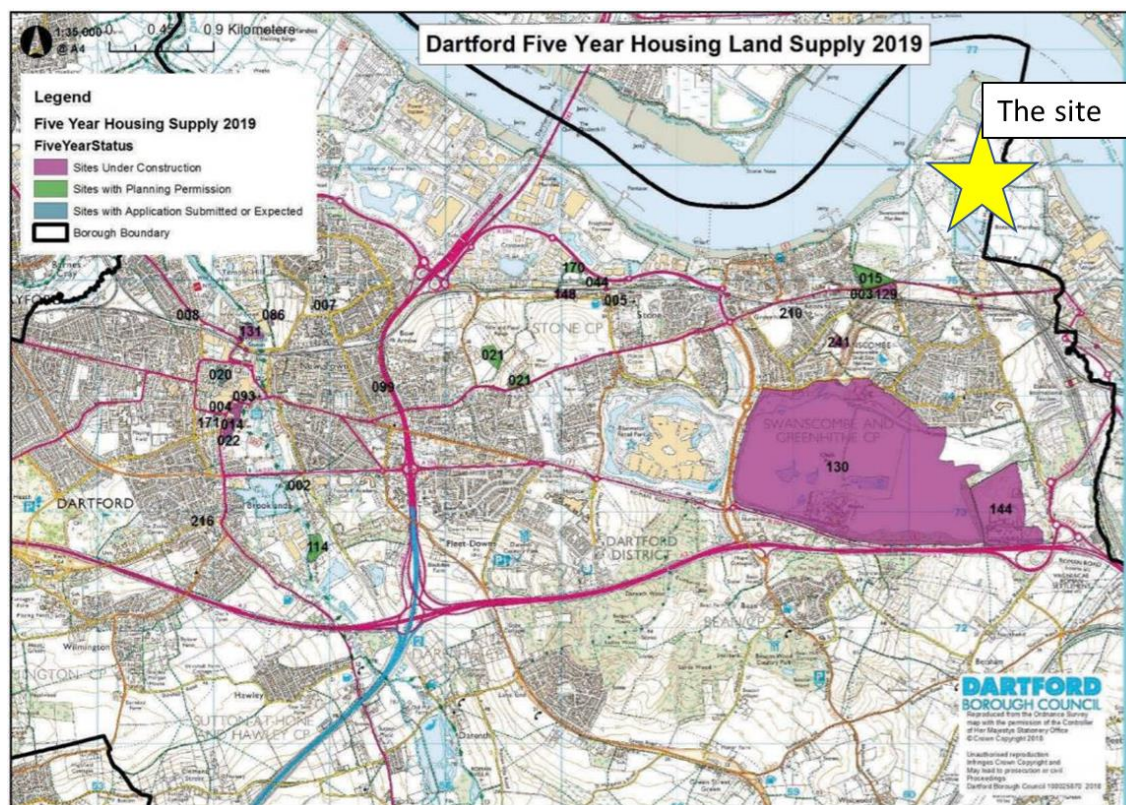
Future baseline – the housing market

Dartford Borough Council Five Year Housing Supply 2019 – 2024

- 7.3.216 Dartford has published their housing need in their five year housing land supply, for April 2019 to 31 March 2024.
- 7.3.217 Within the Dartford Core Strategy, major growth and regeneration plans are focused on three priority areas: Dartford town centre/ Northern Gateway, the Thames Waterfront, and Ebbsfleet to Stone. Major sites at these locations have all contributed significant levels of new home completions. Dartford officially completed 3,206 (net) new homes over the last three financial years.
- 7.3.218 Starts on sites recorded in 2019 indicate that high delivery levels are likely to be maintained. Large consented sites are now being delivered at Ebbsfleet and elsewhere and provide a robust and sizeable source of future supply, in addition to a variety of smaller permissions. Dartford has 4,718 deliverable new dwellings over the five year period. In total, 3,674 dwellings are forecast at sites that have already commenced (76% total forecast). Diagram 7.3.18 shows the five year housing supply in the context of the site.

¹³³ South Essex Strategic Housing Market Assessment, May 2016

Diagram 7.3.18 Dartford five year housing deliverable sites



Source: Dartford Borough Council, *Dartford Five Year Deliverable Housing Supply, 2019*. Note: Star identifying site location is illustrative only.

7.3.219 The government's Local Housing Need (LHN) standard method resulted in a requirement of 3,985 dwellings to be completed in the borough over the five year period (797p.a.) This is within the Dartford's Local Plan current (Core Strategy) housing aims of 585 to 865p.a. dwellings but will be updated on the basis of new national datasets. The NPPF requires a buffer of 5% to ensure choice and competition in the market for land. This increases the requirement to 4,184 dwellings.

7.3.220 The Council also provide the annual Brownfield Land Register as an indication for long-term sources of housing. According to the 2019 report, the 31 sites have the capacity to deliver between 2,593 and 5,668 dwellings, 2,013 – 4,406 of which have permission. One site, Ebbsfleet Central, has permission for between 1,000 and 3,382 dwellings, contributing significantly to the overall total.¹³⁴

Gravesham Borough Council Five Year Deliverable Housing Land Supply Statement 2018 - 2023

7.3.221 Policy CS02 of the Gravesham Local Plan Core Strategy sets out the scale and distribution of development and includes a housing requirement for at least 6,170 additional dwellings for the plan period 2011-2028, to be delivered at a variable rate as

¹³⁴ Dartford Borough Council, 2019, Brownfield Land Register

follows:

- at least 325 dwellings per year for 2011/2012 – 2018/2019,
- at least 363 dwellings per year for 2019/2020 – 2023/2024,
- at least 438 dwellings per year 2024/2025 – 2027/2028.

7.3.222 Of these 6,170 required, 1,030 are expected at Northfleet Embankment & Swanscombe Peninsula East Opportunity Area.¹³⁵

7.3.223 Between 2011/12 and 2017/18, the net dwelling target in Gravesham was 325 per annum (total 2,275). This target was only reached in one of the seven years (401 dwellings were completed in 2012/13). Overall, only 1,601 dwellings were delivered over the seven years; an under delivery of 674 (30% below target). These 674 are carried forward into the remaining plan years, hence the delivery requirement for 2018 to 2028 is now 4,569 and, within this, the new target for 2018 to 2023 is 2,451. Including a 20% buffer as required by the NPPF,¹³⁶ the total requirement for 2018 to 2023 is 2,941.

7.3.224 Sites have been identified with the capacity to deliver 2,585 dwellings within the five year period. This is less than the 2,941 required by policy, hence Gravesham has insufficient housing land supply.

7.3.225 To address this, the Government requires local planning authorities to identify sites from years 6-10 which can be brought forward into the five year land supply period. The council is working in partnership with the Ebbsfleet Development Corporation to bring forward development within the area. Both Dartford and Gravesham Borough Councils have adopted the EDC's Framework Masterplan for the area, as well as progressing discussions with developers and site owners to expedite delivery of development. To date this has resulted in delivery of Springhead, Ebbsfleet at a greater pace than previously envisaged, as well as an increase in the quantum and pace of development at Northfleet Embankment East.

7.3.226 The most recent Gravesham Brownfield Land Register identifies sites with capacity for up to 3,055 dwellings, only 691 of which are permissioned.¹³⁷

7.3.227 Additionally, the EDC Implementation Framework (covering the years to 2037) outlines, for the five existing development proposals with consent, space for some 11,000 homes (6,000 in Eastern Quarry approx.. 3,000 in Ebbsfleet Central). The majority of these are in Dartford, but some also appear in Gravesham.¹³⁸ This additional Dartford figure is on par with their expectations as outlined in previous discussions with Dartford Borough Council, which stated that 5,320 houses will be built past 2026 (the end of the plan

¹³⁵ Gravesham Local Plan Core Strategy, 2014.

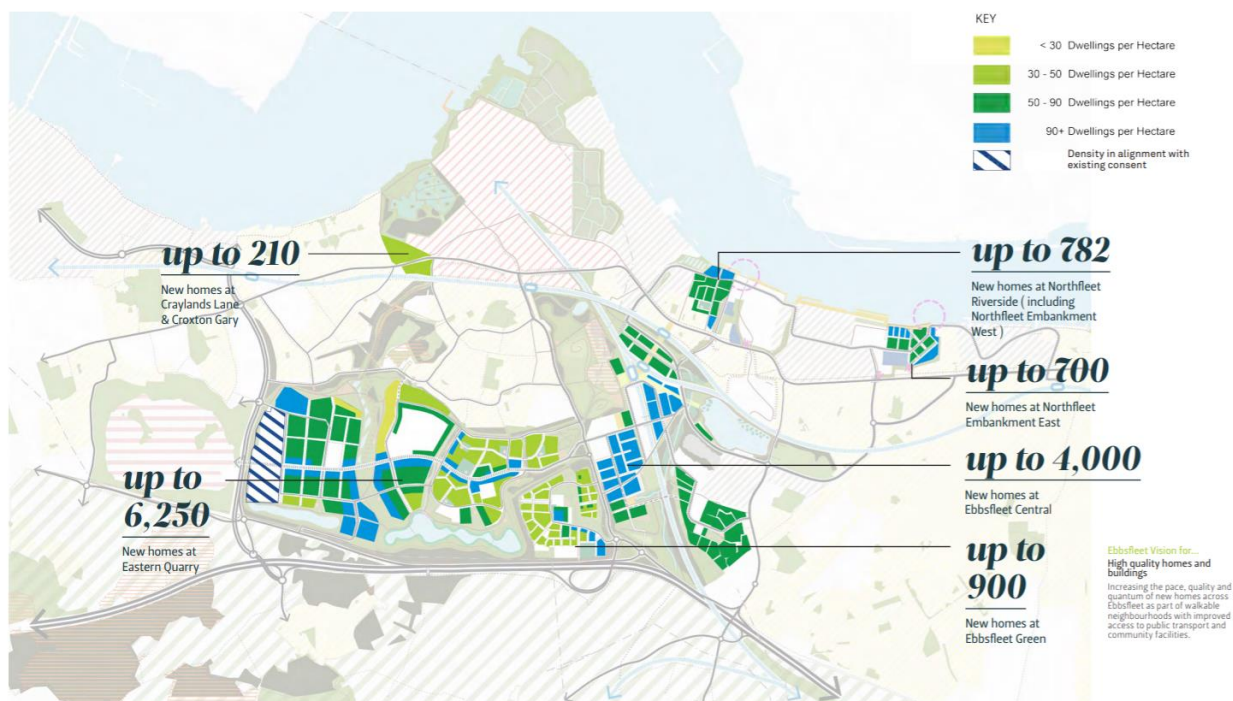
¹³⁶ In cases of historic under delivery, as in Gravesham, policy requires that the 5% buffer is increased to 20% to provide a realistic prospect of achieving the planned supply and ensure choice and competition in the market for land.

¹³⁷ Gravesham Borough Council, 2019, Brownfield Land Register

¹³⁸ Ebbsfleet Development Corporation, Ebbsfleet Implementation Framework, 2017

period), with the majority expected to arise from the Ebbsfleet Garden City site at Ebbsfleet Quarry.

Diagram 7.3.19 Homes



Source: EDC, *Ebbsfleet Implementation Framework*, 2017

Thurrock Five Year Housing Land Supply Position Statement

7.3.228 Despite intentions that this statement be updated at least annually, the 2016 version is the most recently published statement. To summarise, the five year supply for housing between 2016 and 2021 was estimated to be 3,441 dwellings. Of these, 3,293 are from sites with permission. This only equates to between 50.2% and 53.6% of the updated requirement. Of these, c. 500 are in Tilbury.¹³⁹

7.3.229 Thurrock Council are in the process of producing the 2020 update. Consultation with Thurrock on the matter identified that there were 4,825 dwellings with planning permission on 34 sites as of 1st April 2020. The vast majority of these are on small and medium sized sites that are likely to come forward within 5 years. There is one single permission for 2,850 at the Purfleet Centre that is likely to be developed well beyond five years. It is estimated that 500 of the permitted dwellings at the Purfleet Centre will come forward within 5 years. Overall, the five year supply from 2020 is likely to be 2,475 sites. The Local Plan Issues and Options Stage 2 identifies an annual housing requirement for 1,173 sites. As Thurrock’s past delivery has fallen below 85%, the five-year land supply target has a 20% buffer added in addition to the standard housing

¹³⁹ Retrieved from <https://www.thurrock.gov.uk/foi-responses/5-year-housing-land-supply-position>. Accessed July 2020

requirement, equating to 1,408 annual requirement. The five year supply of 2,475 dwellings therefore equates to just 1.75 years; 35% of the requirement.¹⁴⁰

Local accommodation options

7.3.230 The London Resort will attract a large number of visitors, which may place additional demand on local accommodation options.

Accommodation stock

7.3.231 It is expected that some visitors to the London Resort will prefer to choose local accommodation options within the CSA, rather than stay in on-site hotels. It is therefore relevant here to consider the current accommodation stock. The table below shows that, across the serviced and non-serviced accommodation sector in the CSA, there are 2,823 rooms. On average, approximately 687 of these will be available year round, but only 361 at peak.

Table 7.3.65 Rooms and occupancy in the CSA

	Rooms	Average		Peak	
		Occupancy	Total available rooms	Occupancy	Total available rooms
Dartford	995	76%	242	87%	127
Gravesham	780	76%	190	87%	100
Thurrock	1,048	76%	255	87%	134
CSA	2,823	76%	687	87%	361

Sources: Visit Britain, Accommodation Stock Audit, 2016; Visit Kent, Accommodation Audit, 2019; Visit Britain, Room Occupancy, 2019. Note: this count excludes the 159 rooms at hotels just outside the CSA and the 40 campsite spaces that were included in the construction worker accommodation baseline as described in Appendix 7.8: Construction Workforce Accommodation Strategy (document reference 6.2.7.8). Inclusion of these elicits the 3,021 rooms in that baseline.

Future baseline – accommodation stock

7.3.232 Paragraph 7.3.65 discusses the hotel growth planned in the area. Considerable housing growth is also planned, which could increase the stock of properties available for holiday rentals or short-term home lettings. These would contribute towards increased temporary accommodation available in the future baseline, across all types. However, in order to be conservative, none of this is assumed to occur nor relied upon. This assessment therefore assesses effects against the current baseline levels.

Retail and leisure provision and expenditure

7.3.233 This section considers the baseline and future baseline for two effects: visitor and

¹⁴⁰ Informed by consultation with Thurrock council

worker expenditure, and retail and leisure provision. The two are discussed together here due to the strong links between them.

7.3.234 The London Resort is expected to attract a large number of visitors each day of operation, who might also spend money in local retail centres. Furthermore, the new workers that will be supported by the London Resort may also choose to spend in local centres. The impact of this on the local businesses should be assessed against existing turnover at retail centres local to the Site.

7.3.235 The London Resort is expected to significantly contribute to retail and leisure provision, offering an addition to the CSA tourist attractions, cultural assets, event spaces and e-sports facilities. However, it also has the potential to displace demand from existing retail and leisure centres in the CSA and RCA.

Baseline

Offering

7.3.236 Appendix 7.9: *Retail and Leisure Impact Assessment* (document reference 6.2.7.9) provides an overview of the existing retail and leisure offering in the CSA.

7.3.237 Key centres identified by the local councils and baseline analysis are as follows:

- Bluewater Shopping Centre (Dartford): a regional shopping centre with a high density of comparison goods floorspace and F&B provision;
- Dartford town centre (Dartford): a local district centre providing comparison and F&B offers but at a lower density than Bluewater. There is also some convenience goods floorspace;
- Gravesend town centre (Gravesham): a local district centre providing comparison and F&B floorspace again at a lower density than Bluewater. There is also some convenience goods floorspace;
- Lakeside Shopping Centre (Thurrock): a regional shopping centre with a high density of comparison and F&B floorspace;
- Lakeside Retail Park (Thurrock): part of the regional centre offering mainly comparison retail;
- Grays (Thurrock): the administrative and cultural centre of the borough and comprises of a more traditional town centre. The retail offer in Grays includes a mix of day-to-day convenience provision and some comparison floorspace.

7.3.238 The main cinema in Dartford is in Bluewater with 17 screens and a capacity of 2,879. The Orchard Theatre in Dartford town centre recently underwent a refurbishment to increase capacity by 69 to 1,025 and attracted 250,000 visitors in the 12 months to June

2019. In Gravesham, the Woodville Halls Theatre (Gravesend) offers an 810 seat auditorium which acts as a space for theatre, concerts, banquets, weddings and trade shows. Underneath the main auditorium is another studio space seating up to 150 and the Blake Gallery offering exhibition space. The Woodville also holds the Paul Greengrass cinema, offering one screen. In Thurrock, there are two operational cinemas: the West Thurrock Warner Multiplex which has seven screens and the West Thurrock UCI Multiplex which has 10 screens. Both have capacity of over 2,000. The Thameside Theatre (c. 320 seats) is part of the Thameside Complex; a multi-purpose arts venue that also includes Thurrock Museum, Grays Library and an exhibition area. There are also a small number of music venues spread across the CSA around the Site.

- 7.3.239 The London Resort would expand the existing leisure market into new sectors through offering different options, such as immersive experiences and productions and e-Sports. These markets are significant and growing – indeed global e-Sports was estimated to generate \$1.1bn in 2019, with year on year growth of 26.7% and a global audience of 452.8m. The audience is broadly split into e-Sports enthusiasts (accounting for just under a half since 2017) and occasional viewers. Asia Pacific accounted for 57% of e-Sports enthusiasts in 2019, with the EU accounting for 16% and America accounting for 15%. Whilst e-Sports can be played or watched anywhere on any platform, the tournaments are almost always physical events with a live audience and referees. Whilst the CSA and even the UK might contain a number of e-Sports spectators, there are limited options for these types of leisure experiences in the CSA and the UK, particularly at the scale proposed by the London Resort.

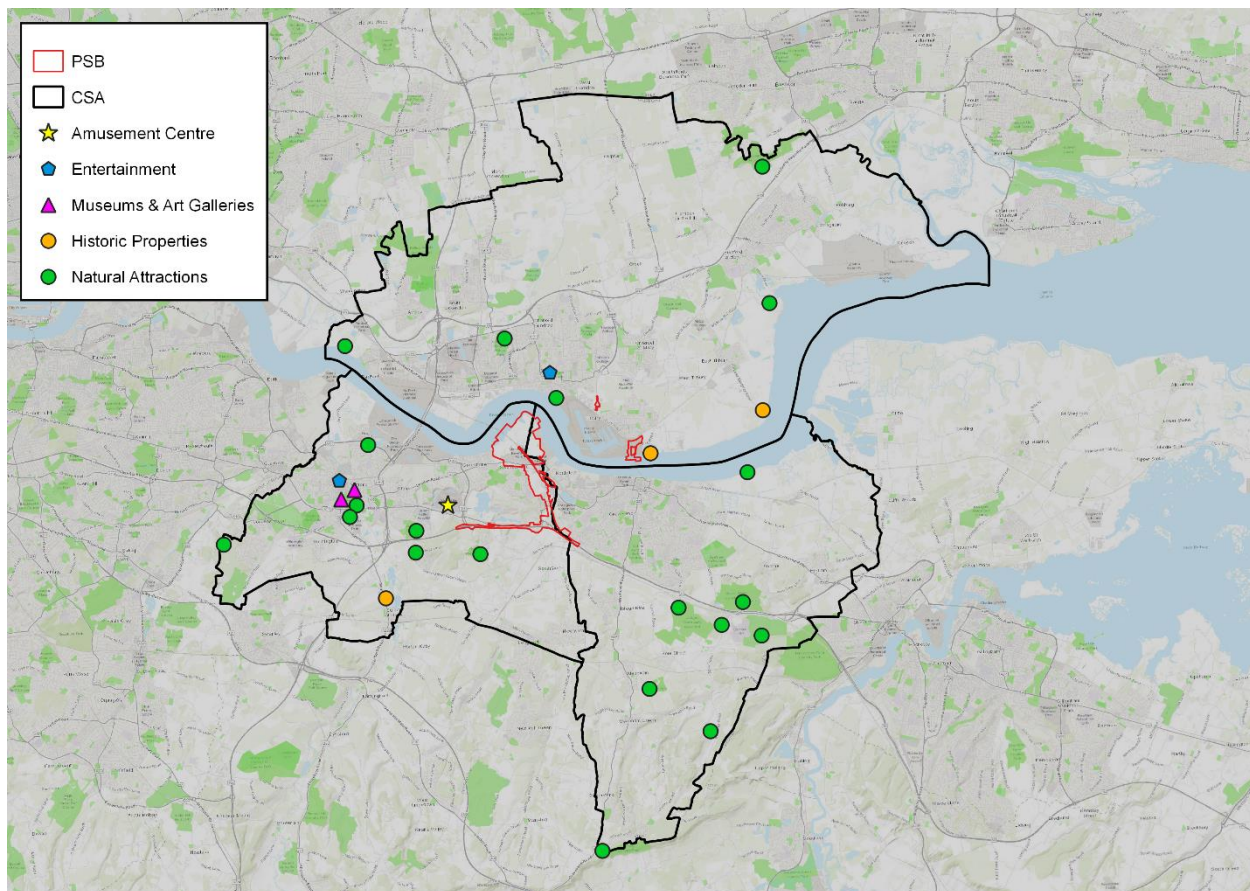
Leisure provision in the CSA, Kent and Essex, and the RCA

- 7.3.240 The London Resort will draw in significant amounts of trade from both domestic and international visitors. There is a potential for visitors to make ‘linked trips’; they could visit the London Resort on one day and visit local attractions another day or, if they are utilising accommodation outside the CSA (such as in London), the tourist attractions and cultural assets there may also benefit from increased demand. At the same time, these assets might need to compete for trade from the potential visitors (which will include some local residents). As such, it is important to baseline them here.

Tourist attractions and cultural assets

- 7.3.241 Diagram 7.3.20 shows various attractions and cultural assets in the CSA, where a large number are concentrated in Dartford, with a notable cluster around Dartford town centre. In Thurrock, most are located to the south of the borough, on the river.

Diagram 7.3.20 Tourist attractions and cultural assets in the CSA



Contains Ordnance Survey data © Crown copyright and database right 2019
 Source: Volterra

7.3.242 There are a number of attractions that are currently located in Dartford.¹⁴¹ For the younger demographic, there is a children’s amusement centre called Dinotropolis - situated in the Bluewater Shopping Centre. Entertainment wise, the Orchard Theatre holds just under 1,000 people and hosts a wide range of events. Other attractions include a number of parks/woodlands, public gardens and lakes: Central Park, Darenth Country Park, Waller Park, Brooklands Lake, Beacon Wood Country Park, Joyden’s Wood, and The Enchanted Woodland. Additionally, there are several cultural assets on offer, such as the Dartford Borough Museum, Stephen Oliver Studio & Gallery, and St John’s Jerusalem – a National Trust property with gardens and a 13th-century chapel. There is also a theatre, bingo hall and nightclubs, which make a significant contribution to the evening economy.¹⁴²

7.3.243 The Gravesham Tourism Strategy notes several visitor offerings, including the Thames riverside, its heritage and Gravesend’s historic role as the maritime gateway to London; strong historic associations with Charles Dickens, Pocahontas, General Gordon and

¹⁴¹ Tripadvisor – Top Attractions in Dartford

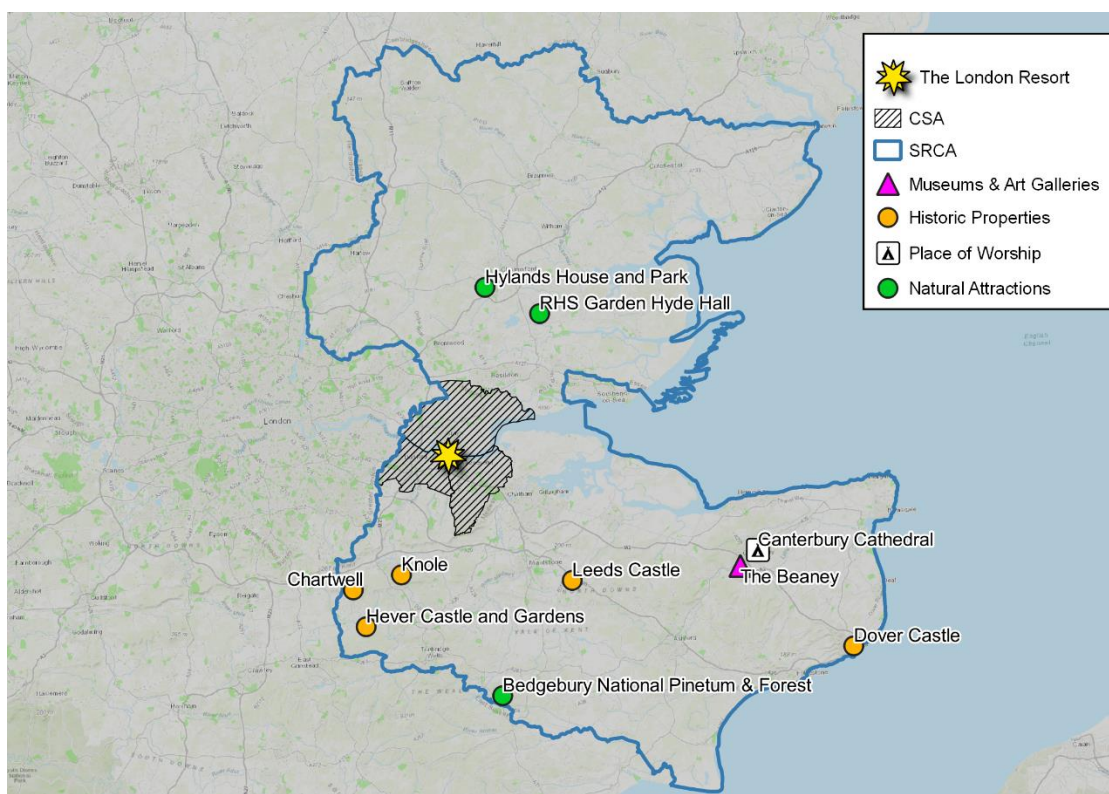
¹⁴² Dartford Borough & Ebbsfleet Development Corporation, 2020 Retail and Leisure Study, Progress Update

others; historic landscapes at Cobham Park & Ashenbank Woods; and exceptional countryside with the Kent Downs Area of Outstanding Natural Beauty, Thames Estuary Marshes and popular country parks at Shorne Woods, Trosley, Camer Park and Jeskyns Farm.¹⁴³

7.3.244 Thurrock also offers a number of visitor attractions, including Tilbury Fort, Thameside Theatre, Essex Wildlife Trust Chafford Gorges Nature Park and Grays Beach Riverside Park. The Core Strategy notes that ‘the Council will work with partners to deliver tourism, festivals and attractions to support regeneration areas and town centres and other Thurrock Assets including Coalhouse Fort, Tilbury Fort, Thames riverfront and the RSPB Nature Reserve.’¹⁴⁴

7.3.245 According to Visit Britain, there are 75 tourist attractions and cultural assets in Kent and Essex. Of these, Hylands House and Park was the most visited attraction in Kent and Essex, with 1.8m visitors in 2019. The next most visited was the Canterbury Cathedral in Kent, which had 1.2m visitors. The top 10 attractions by visitor number are displayed on Diagram 7.3.21 and in (Table 7.3.66) below. None of these are located within the CSA.

Diagram 7.3.21 Top attractions in Kent and Essex



Contains Ordnance Survey data © Crown copyright and database right 2019

¹⁴³ Gravesham Borough Council, A Tourism Strategy for Gravesham (2009 – 2012) – Draft, 2009

¹⁴⁴ Thurrock Council, Core Strategy and Policies for Management of Development (as amended) Adopted January 2015, 2015

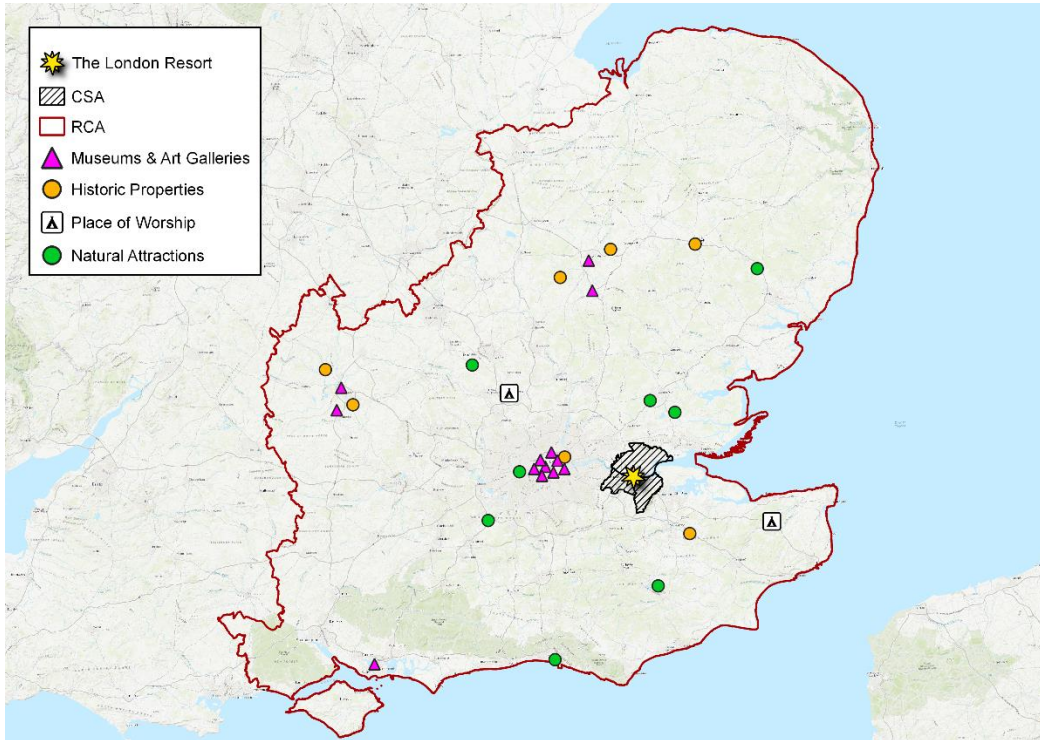
Table 7.3.66 Top attractions in Kent and Essex

Attraction	County	District	Category	2019 visitors
Hylands House and Park	Essex	Chelmsford	Country Park	1,800,000
Canterbury Cathedral	Kent	Canterbury	Place of worship	1,200,000
Leeds Castle	Kent	Maidstone	Historic Properties	540,000
Bedgebury National Pinetum & Forest	Kent	Cranbrook	Country Park	527,000
Hever Castle and Gardens	Kent	Edenbridge	Historic Properties	415,000
Dover Castle	Kent	Dover	Historic Properties	368,000
RHS Garden Hyde Hall	Essex	Chelmsford	Garden	360,000
The Beaney (including Canterbury Tourism Information) (previously 'Canterbury Royal Museum and Art Gallery')	Kent	Canterbury	Museums & Art Galleries	265,000
Chartwell	Kent	Westerham	Historic Properties	253,000
Knole	Kent	Sevenoaks	Historic Properties	205,000

Source: Annual Survey of Visits to Visitor Attractions, 2019

7.3.246 Across the RCA (London, South East and East), a total of 395 major tourist attractions and cultural assets have been identified by Visit Britain. This data focuses on cultural attractions for which data is provided by Visit Britain, and does exclude major commercial operations (for example existing theme parks, major retail destinations) but nevertheless provides a helpful consideration of key tourist attractions. Overall, 9 out of the top 10 most visited attractions across the RCA are all within London, with the remaining one situated in the South East (Brighton Pier). On an individual region-by-region basis, visitor data shows that the British Museum was the most visited attraction in London, recording approximately 6.2m visitors in 2019. The Brighton Pier was the most popular attraction in the South East with an estimated 4.9m visitors, whilst Hylands House and Park attracted 1.8m visitors, making it the most popular attraction in the East. As noted above, these compare to Canterbury Cathedral (1.2m) and Hylands House and Park (1.8m) as the most visited attractions in Kent and Essex. The diagram below illustrates the top 10 tourist attractions and cultural assets found in the regional area.

Diagram 7.3.22 Top attractions in the RCA



Contains Ordnance Survey data © Crown copyright and database right 2019
Source: Volterra

Table 7.3.67 Top attractions in the RCA

Attraction	Category	2019 visitors
Top 10 most visited - London		
British Museum	Museums & Art Galleries	6,200,000
Tate Modern	Museums & Art Galleries	6,100,000
National Gallery, The	Museums & Art Galleries	6,000,000
NHM (South Kensington)	Museums & Art Galleries	5,400,000
V&A South Kensington	Museums & Art Galleries	4,000,000
Science Museum	Museums & Art Galleries	3,300,000
Tower of London	Historic Properties	3,000,000
Somerset House	Museums & Art Galleries	2,800,000
Royal Botanic Gardens, Kew	Natural Attractions	2,300,000
Tate Britain	Museums & Art Galleries	1,800,000
Top 10 most visited - South East		
Brighton Pier	Natural Attractions	4,900,000
Canterbury Cathedral	Place of worship	1,200,000
RHS Garden Wisley	Natural Attractions	1,200,000
National Museum Royal Navy	Museums & Art Galleries	1,100,000
Blenheim Palace	Historic Properties	1,000,000
Ashmolean Museum of Art and	Museums & Art Galleries	900,000

Attraction	Category	2019 visitors
Archaeology		
Oxford University Museum of Natural History	Museums & Art Galleries	800,000
Bodleian Library	Historic Properties	800,000
Leeds Castle	Historic Properties	500,000
Bedgebury National Pinetum & Forest	Natural Attractions	500,000
Top 10 most visited - East		
Hylands House and Park	Natural Attractions	1,830,000
The Abbey Gardens and Abbey Ruins	Historic Properties	1,230,000
ZSL Whipsnade Zoo	Natural Attractions	730,000
Imperial War Museum Duxford	Museums & Art Galleries	400,000
Anglesey Abbey, Gardens and Lode Mill	Historic Properties	400,000
Needham Lake and Nature Reserve	Natural Attractions	380,000
RHS Garden Hyde Hall	Natural Attractions	360,000
Cathedral and Abbey Church of St Alban	Place of worship	350,000
Fitzwilliam Museum	Museums & Art Galleries	350,000
Wimpole Hall and Home Farm	Historic Properties	340,000

Source: Annual Survey of Visits to Visitor Attractions, 2019

Employment

7.3.247 Retail turnover ultimately supports retail jobs, so a comparison of retail employment in the CSA can give an indication of the importance of retail to the residents. Overall, it can be seen that both Dartford and Thurrock have a far higher proportion of their workforce employed in retail (16% and 17% respectively) than Gravesham (10%) and GB (9%). Employment in the sector as a proportion of total employment has fallen in all geographies since 2009.

Table 7.3.68 CSA workplace based employment in retail and proportion of total employment in 2009 and 2018

	2009		2018	
	Employment	% of total employment	Employment	% of total employment
Dartford	11,000	22%	9,000	16%
Gravesham	3,500	12%	3,500	10%
Thurrock	12,000	20%	11,500	17%
CSA	26,500	19%	24,500	15%
GB	2.9m	10%	2.9m	9%

Source: ONS, Business Register and Employment Survey, 2009, 2018

7.3.248

Future baseline*Population*

7.3.249 The forecast population growth is presented in Table 7.3.43. The population of the CSA is expected to grow at a faster rate than the national average, increasing demand for retail and leisure uses in the CSA.

Turnover

7.3.250 Turnover in the CSA provides the baseline against which to assess any additional expenditure by visitors or workers at the London Resort and assess any trade diversion. Table 7.3.69 presents turnover estimates for key assessment years. These are split by sector based on the types of spend that are to be affected by the London Resort. Appendix 7.9: *Retail and Leisure Impact Assessment* (document reference 6.2.7.9) provides more detail on the estimates.

Table 7.3.69 Future turnover estimates in the CSA (£m)

		2025	2030	2038
Comparison	Dartford	£1,440m	£1,721m	£2,288m
	Gravesham	£352m	£431m	£594m
	Thurrock	£2,447m	£2,977m	£4,060m
	CSA	£4,239m	£5,129m	£6,943m
Convenience	Dartford	£118m	£132m	£141m
	Gravesham	£324m	£357m	£379m
	Thurrock	£564m	£586m	£632m
	CSA	£1,007m	£1,075m	£1,152m
Restaurants and café meals	Dartford	£160m	£177m	£216m
	Gravesham	£79m	£85m	£96m
	Thurrock	£251m	£279m	£329m
	CSA	£489m	£541m	£641m
Alcoholic drinks outside home	Dartford	£19m	£22m	£26m
	Gravesham	£12m	£13m	£15m
	Thurrock	£24m	£27m	£32m
	CSA	£56m	£63m	£73m
Cinemas and theatres	Dartford	£21m	£24m	£29m
	Gravesham	£4m	£4m	£5m
	Thurrock	£23m	£26m	£30m
	CSA	£49m	£55m	£64m
Night clubs/music venues/disco/bingo	Dartford	£30m	£34m	£40m
	Gravesham	£11m	£12m	£13m
	Thurrock	£37m	£41m	£48m
	CSA	£77m	£86m	£102m

Sources: Bluewater Shopping Centre Proposed Extension (REF: 16/01207/OUT) Retail Planning Impact

Appraisal (RPIA), 2017; North Kent SHENA Retail & Commercial Leisure Assessment, 2016; South Essex Retail Study, 2017; Volterra calculations

7.3.251 Considering e-Sports specifically, games market analyst Newzoo estimates that the global e-Sports market will generate \$1.8bn in 2022. The global audience has grown from 335m in 2017 to a projected 645m in 2022.

Cumulative schemes

7.3.252 Retail and leisure provision and future schemes provide the baseline against which to assess the contribution of the London Resort to retail and leisure within the CSA.

7.3.253 Of the cumulative schemes, seven have been identified that may impact future demand and provision of retail and leisure uses in the CSA. These include Land to the west of Bluewater Parkway in Greenhithe, Chadfields in Tilbury, Aveley Lakes in Aveley, Land east of Caspian Way in Swanscombe, Langdon Hills Golf and Country Club in Upminster, Land at Former Northfleet Cement Works, and Northfleet Embankment East. The schemes listed above have proposals to provide a variety of retail/leisure uses including adventure centres, sports stadiums/facilities, entertainment facilities (cinema, museum, gallery) and restaurants/café's and bars. There is limited quantitative information on the amount of floorspace or visitors that may be generated by these proposals, however more detail of these schemes can be found in Appendix 7.3: *Detailed Baseline* (document reference 6.2.7.3).

7.3.254 The Ebbsfleet Implementation Framework states that, for the six existing development proposals with consent, there is maximum consent for 28,000 sqm retail space delivered across five of the six proposals (mostly at Eastern Quarry) and maximum consent for 24,000 sqm of leisure floorspace at Eastern Quarry. Furthermore, there is 147,000 sqm across an (undefined) split of retail, hotels and leisure in Ebbsfleet Central. Most of these plans are relevant to the Dartford side of the EDC area.

7.3.255 Regeneration is planned for both Dartford and Gravesend town centres. Dartford town centre regeneration will include a new cinema, retail, restaurants and bars. Gravesend town centre regeneration will include a new cinema/theatre. Gravesham notes the importance of the Heritage Quarter planning application in bringing forward leisure provision to meet the future demand and increasing the attractiveness of the town centre. Thurrock notes the success of Lakeside Shopping Centre as central to its strong future leisure offering.

COVID-19

7.3.256 Appendix 7.9: *Retail and Leisure Impact Assessment* (document reference 6.2.7.9) contains detailed discussion over the adverse impact of COVID-19 on the high street. Overall, the discussion finds that the high street has been disproportionately affected by the restrictions. Whilst many forecasts estimate recovery for the general economy by 2024, it is possible that the high street will still be feeling effects after this point.

Spending on the high street has been inhibited, having a knock-on effect for retail and leisure provision. The general decline of the town centres that was seen in the years leading up to the crisis has only worsened by the restrictions on any visits at all. If the effects of COVID-19 persist longer than the forecasts expect such that they affect the future assessment years for the London Resort, then future baseline spending and retail and leisure provision could fall, increasing the sensitivity of the receptor.

Healthcare

7.3.257 During the operational phase of the London Resort, workers and visitors may place additional demand on local healthcare services. To estimate the impact of this, existing provision is considered here.

Baseline

7.3.258 The construction baseline found that within the CIA there are currently six GPs, four dental surgeries, and two pharmacies. There is one hospital department for emergency healthcare services which is just outside of the CIA. GP provision is significantly constrained at a ratio of 3,700 patients for every GP FTE. In contrast, the provision of dental services is less constrained as three out of the four dental surgeries are currently taking in new patients.

7.3.259 The nearest A&E to the site (falling within the CIA) is Darent Valley Hospital, which is part of the Dartford and Gravesham NHS Trust. The Dartford and Gravesham Trust also covers Queen Mary's Hospital and Erith & District Hospital, but these do not offer A&E services. The nearest major trauma centres to the PSB are the King's College Hospital and Royal London Hospital located in London. The London Resort will contain a helipad for emergency use in the rare event of a major emergency incident. The A&E performance of the Dartford and Gravesham Trust is relatively high when compared to the national level as well as surrounding NHS Trusts in the regional area, whilst all still performing below the national target, reflecting countrywide constraints on healthcare.

Future baseline – healthcare

7.3.260 The Dartford Borough Council Infrastructure Delivery Plan¹⁴⁵ states that a new primary healthcare facility is to be provided within Ebbsfleet Garden City (EGC), although it is unsure of the timing of the delivery. Furthermore, a new primary healthcare facility is being provided at Stone / Greenhithe area (just outside the CIA) providing new facilities for three GP practices in order to meet demand from new housing development nearby. This will be delivered by 2022. These will help to meet some of the additional demand that new residents in the area will impose. The Plan also mentions the potential expansion at Darent Valley Hospital in response to demand from development, but this is uncertain

¹⁴⁵ Dartford Borough Council, 2019, Infrastructure Delivery Plan

- 7.3.261 During pre-application consultation, EDC noted that a key bit of future infrastructure will be the Health and Wellbeing Hub, which will be contained within the Health, Education and Innovation Quarter, just south of Ebbsfleet International station. The business case for the Hub is yet to be presented and so feasibility is still to be determined. If delivered, this will be operational by 2025. The Hub services will be majority dedicated to social determinants of health (social care, mental health etc) but with a portion dedicated to clinical services (GPs) too. The other main health infrastructure development is the provision of an Urgent Treatment Centre at Gravesham Hospital, due to open in December 2020. This replaces some of the functions of a previous walk-in centre that has been closed down but will contain some additional capacity.
- 7.3.262 Thurrock's Health and Wellbeing Strategy¹⁴⁶ sets out the aim of delivering four new healthy living centres built with GPs, nurses, mental health services, wellbeing programmes, community hubs and outpatient clinics under one roof. One of these has already been handed over in Purfleet, in southern Thurrock, close to the Essex Project Site.

COVID-19

- 7.3.263 Paragraphs 7.3.57 to 7.3.62 present information on the impact of COVID-19 on the healthcare baseline.

Public services

- 7.3.264 The London Resort does not contain a residential element which is expected to accommodate any school-aged residents. However, due to the impact of the workforce on the local housing market and the likely links with local schools and colleges, the education baseline is considered below. Furthermore, the operational phase of the London Resort is expected to support a number of additional visitors and workers in the area, all of which may place additional strain on emergency services (police stations, ambulance stations and fire stations).

Baseline

Education

- 7.3.265 Paragraphs 7.3.127 to 7.3.136 present information on the education baseline.

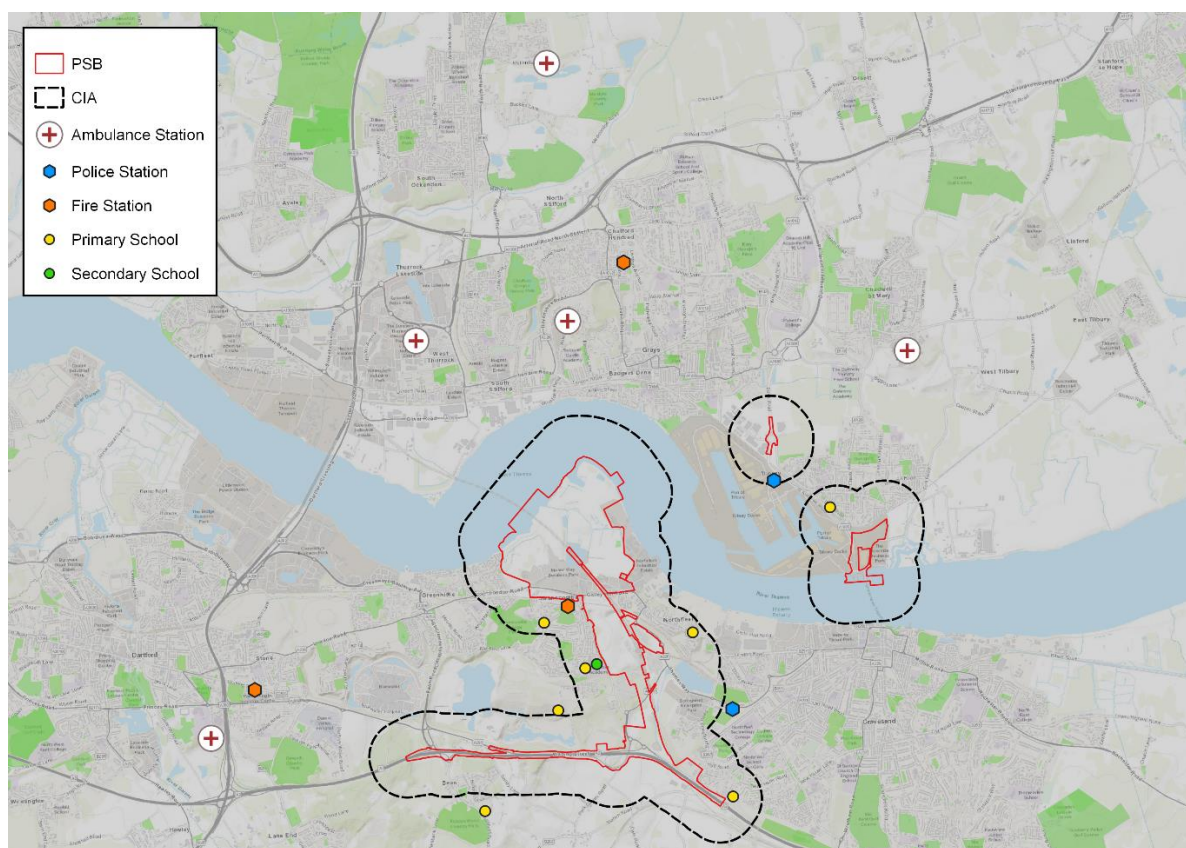
Emergency services (police stations, ambulance stations, fire stations)

- 7.3.266 Diagram 7.3.23 illustrates the defined public services infrastructure that are contained within the CIA.
- 7.3.267 In terms of ambulance services, the nearest ambulance service to the Kent Project Site

¹⁴⁶ Thurrock Council, 2016, Health and Wellbeing Strategy

is the SECAmb Station in Dartford, whereas the Essex Project Site is served by four ambulance services, the closest being the Euromed Ambulance Service just north of Tilbury. For police services, the closest police station to the Kent Project Site is North Kent Police Station, between Ebbsfleet and Gravesend. Within the CIA, Tilbury Police Station is located on the north side of the river. There are two fire stations in the vicinity of the Kent Project Site – one lies within the CIA, whilst the other is located outside the CIA towards the lower western area of the Project Site. There is also a fire station north west of Tilbury.¹⁴⁷

Diagram 7.3.23 Public services infrastructure within the CIA



Sources: Ordnance Survey, Addressbase Premium, Google Maps

Future baseline – public services

- 7.3.268 Paragraph 7.3.142 contains information on future education provision.
- 7.3.269 For police, ambulance, and fire services, no future baseline information could be found and so effects are assessed against current levels.
- 7.3.270 Table 7.3.70 is a summary of the single cumulative scheme within the PSB in addition to a further six cumulative schemes in the CIA, that are expected to affect the future

¹⁴⁷ Addressbase Premium, Google Maps

provision of public services within and around the relevant study areas.

Table 7.3.70 Cumulative schemes and public service provision

Cumulative scheme	Facilities/services provided
PSB	
Land West of Springhead Road (Swanscombe)	Provision of a 2FE primary school – facilities for hire at the school. Financial contribution to the provision of new health facilities.
CIA	
Eastern Quarry	Neighbourhood facilities, emergency services, health services, educational and recreational facilities.
The Pier (Greenhithe)	Public space enhancements with community development through a new neighbourhood centre.
Northfleet Embankment	2FE primary school and community facilities
Land at Coldharbour Road (Northfleet)	Formal play space for children (1 LEAP and 2 LAPs) ¹⁴⁸
Chadfields (Tilbury)	New clubhouse will provide community facilities.
Land at Former Northfleet Cement Works	Proposals include a 180m ² community centre

COVID-19

7.3.271 At present, there is a lack of data to suggest that public emergency services (ambulance, fire services, and police services) have been adversely affected by the COVID-19 pandemic in terms of their ability to provide sufficient assistance to those who require it. Therefore, the current provision of public emergency services located within and around the CIA is assumed to be in a relatively similar state to provision during the pre-COVID period. In terms of educational provision, it is clear that the initial lockdown measures included restrictions on children attending school, thus preventing access to education for a large section of the population. However, these measures have since been relaxed, and schools are expected to continue to maintain normal operating capacity, assuming that further lockdown measures are avoided. On this basis, the current and future provision and accessibility of educational services is expected to be relatively similar to pre-pandemic levels, whilst acknowledging that children will have missed large periods of education and schools will be implementing recovery curriculums and approaches to narrow any gaps in attainment and progress.

¹⁴⁸ LAP refers to Local Area of Play, whilst LEAP is a Local Equipped Area for Play.