Rampion 2 Wind Farm

Category 6: Environmental Statement

Volume 4, Appendix 17.3: Socio-economics technical baseline

Date: August 2023

Revision A

Document Reference: 6.4.17.3
Pursuant to: APFP Regulation 5 (2) (a)
Ecodoc number: 004866498-01

Document revisions

Revision	Date	Status/reason for issue	Author	Checked by	Approved by
A	04/08/2023	Final for DCO Application	Hatch	RED	RED

Contents

List of Tables

List of Figures

List of Annexes

1. Socio-economic baseline

1.1 Introduction

1.1.1 This Appendix presents the preparatory work for the socio-economics assessment presented in **Chapter 17: Socio-economics, Volume 2** of the Environmental Statement (ES) (Document Reference 6.2.17).

1.1.2 This Appendix sets out the socio-economic baseline in which Rampion 2 is to be delivered, covering the national, sub-regional and local policy context, in addition to a detailed assessment of the key socio-economic, tourism and recreation conditions within the study area. Where appropriate, comparison with the national average is included to provide additional context to the analysis.

1.2 Policy context

Introduction

1.2.1 Renewable energy and offshore wind in particular have become increasingly important nationally over the past two decades. Growth in the renewable energy sector has traditionally been driven by environmental benefits and contribution to climate change goals, however, it now presents a significant opportunity in terms of economic development and is becoming a key driver of regional economic growth, both at the national as well as local and sub-regional levels.

National policy context

Clean Growth Strategy

1.2.2 In 2017 the UK government developed a *Clean Growth Strategy* (HM Government, 2017b) to ensure that economic growth goes hand in hand with greater protection for the natural environment. Within this is a commitment to help businesses and entrepreneurs seize opportunities of a low carbon economy, and specifically offshore wind. This is driven by policies and processes to improve the route to market for renewable technologies such as offshore wind.

1.2.3 Under its ambition to deliver clean, smart and flexible power the Clean Growth Strategy seeks to deliver a diverse electricity system that supplies homes and businesses with secure, affordable and clean power, and aims to deliver this through the development of low carbon sources of electricity (including renewables). The Clean Growth Strategy acknowledges that the UK is well-placed to benefit and become one of the most advanced economies for smart energy and technologies.

Build Back Better: Our Plan for Growth (HM Treasury, 2021)

1.2.4 This policy paper sets out the UK Government's plan 'to deliver growth that creates high-quality jobs across the UK' by building on the three core pillars of infrastructure, skills and innovation.

1.2.5 The plan supports advancing the development of the offshore wind sector, with the objective being to quadruple capacity (up to 40GW from 30GW) by 2030, supporting the creation of up to 60,000 jobs along the way (this has been raised again more recently to 50GW as set out above).

Net Zero Strategy: Build Back Greener (HM Government, 2021)

1.2.6 Over the last decade the UK's commitments to reducing UK GHG emissions levels have strengthened. This has made more apparent the need to shift towards a greener energy mix in order to deliver on the UK's targets. In June 2019 the UK became the first major economy in the world to pass a national net zero emissions law. The new 2020 Nationally Determined Contributions (NDCs) committed the UK to reducing economy-wide greenhouse gas emissions by at least 68% by 2030 (compared to 1990 levels). In June 2021 the UK Government went further on its commitments by setting a new target to cut emissions by 78% by 2035 compared to 1990 levels.

1.2.7 In October 2021, the UK government published its Net Zero Strategy: Build Back Greener (HM Government, 2021). The strategy sets out how the UK will deliver on its commitment to reach net zero emissions by 2050. To fully decarbonise the power system by 2035, the strategy looks to deliver 40GW of offshore wind, including 1GW of innovative floating offshore wind by 2030, among others. It should be noted that the 40GW objective has more recently been increased to 50GW.

British Energy Security Strategy

1.2.8 The British Energy Security Strategy (HM Government 2022) was released in April 2022 outlining how the government can provide secure, clean and affordable British energy for the long term. It outlines how to streamline and speed up the process to get permission for offshore wind turbines in order to increase the pace of deployment by 25%. The ambition is to deliver up to 50GW by 2030, including up to 5GW of innovative floating wind. This will equate to over half of the UKs renewable generation capacity will be wind both onshore and offshore.

Levelling Up

1.2.9 The Levelling Up White Paper published in 2022 sets out how the UK Government intends to spread opportunity more equally across the UK. This includes a commitment to £26bn of public capital investment for the green industrial revolution and the UK transition to Net Zero.

1.2.10 A key mission of the Levelling up agenda is to increase the number of people successfully completing high-quality skills training. The Levelling Up White Paper states an aim to have 200,000 more people successfully completing high-quality

skills training annually, driven by 80,000 more people completing courses in the lowest skilled areas.

1.2.11 The results of the second round of levelling up funding are due to be announced at the November 2022 budget. There is uncertainty as to whether the third round of funding will go ahead and whether levelling up will remain as governmental policy going forwards.

Offshore wind Sector Deal

1.2.12 In 2019 the UK government and the offshore wind industry committed to a *Sector Deal* (HM Government, 2019a) to help the industry raise the productivity and competitiveness of UK companies to ensure the UK continues to play a leading role as the global market grows in the decades to 2050. Key commitments included:

- increasing UK content to 60 percent of value associated with offshore windfarm activity by 2030;
- £250 million industry investment in building a stronger UK supply chain to support productivity and increase competitiveness;
- providing forward visibility of future CfD rounds with support of up to £557 million;
- increasing exports fivefold to £2.6 billion by 2030; and
- increasing the representation of women in the offshore wind workforce to at least a third by 2030.

1.2.13 At the start of March 2020, the government issued a one-year progress note (BEIS, 2020) on the Sector Deal, highlighting a number of major developments in the sector such as:

- Development and establishment of the Offshore Wind Growth Partnership (OWGP) – A long-term business transformation programme aimed at promoting closer collaboration across the sector's supply chain, implementing productivity improvement programmes, and facilitating shared growth opportunities between developers and the supply chain. The OWGP's objective is to maximise the economic benefits of the UK's world-leading position in offshore wind by delivering increased productivity and competitiveness. To date, the OWGP has completed an in-depth assessment of capacity in the delivery of offshore wind foundations and made recommendations on how barriers to growth can be overcome.
- Development of regional clusters – Clusters are a collaboration between developers and regional supply chain, public sector and education bodies, with the ambition to increase productivity, competitiveness and innovation, whilst also helping to grow coastal economies.
- Appointment of a Diversity Champion.

1.2.14 The progress note highlights that since publication of the Sector Deal, the costs of offshore wind have continued to fall reaching £39.65/MWh (2012-pricing) for

offshore wind farms to be delivered in 2023 to 2024. This represents an overall decrease of around 65 percent when compared with projects in the 2015 auction.

1.2.15 Furthermore, the note indicates that whilst the Sector Deal is progressing well, the government seeks to be more ambitious in order to achieve net zero carbon by 2050. This is likely to require higher volumes of offshore wind deployment than previously envisaged to meet greater levels of electrification across the economy.

Tourism Sector Deal

1.2.16 The *Tourism Sector Deal* (HM Government, 2019b) builds on the UK Industrial Strategy (HM Government, 2017a), by creating a framework which positions the tourism industry to take advantage of new markets whilst also leveraging initiatives designed to deliver the Strategy's Grand Challenges relating to the data-driven economy (AI), clean growth and ageing society.

1.2.17 The Tourism Sector Deal sets out an ambitious agenda that will deliver increases in productivity and investment that benefits local economies across the country.

1.2.18 The government is also introducing two new T-levels in Cultural Heritage and Visitor Attractions, as well as Catering to help deliver the industry workers of the future. This includes support to deliver 30,000 apprenticeships per year by 2025, and a mentoring programme aimed at supporting 10,000 employees to enhance their careers and develop as future leaders in tourism.

1.2.19 By 2025, the Tourism Sector Deal will:

- more than double the size of the industry nationally to £268 billion;
- grow employment in the sector to 3.8 million; and
- deliver a 1 percent increase in productivity worth £12 billion to the national economy.

National Policy Statement for Energy

1.2.20 Planning policy on offshore renewable energy nationally significant infrastructure projects (NSIPs), specifically in relation to socio-economics is contained in the *Overarching National Policy Statement for Energy* (NPS EN-1) (Department for Energy and Climate Change (DECC), 2011c), the *NPS for Renewable Energy Infrastructure* (NPS EN-3) (DECC, 2011b) and the *NPS for Electricity Networks Infrastructure10* (NPS EN-5) (DECC, 2011a). Neither NPS EN-3 nor NPS EN-5 provide specific guidance on socio-economic issues.

1.2.21 NPS EN-1 includes guidance on socio-economic matters that need to be considered in the assessment of energy infrastructure projects, including:

- an assessment of the effects on the coast, and in particular the effects of the proposed project on maintaining coastal recreation sites and features (see Section 5.5.7);
- the need to consult with the local community on proposals to build on open space, sports and/ or recreational buildings and land. 'Taking account of the consultations, applicants should consider providing new or additional open

space including green infrastructure, sport or recreation facilities, to substitute for any losses as a result of their proposal' (see Section 5.10.6);

- the creation of jobs and training opportunities (see Section 5.12.3);
- the provision of additional local services and improvements to local infrastructure (including educational and/ or visitor facilities) (see Section 5.12.3);
- the effects on tourism (see Section 5.12.3);
- the impact of a changing influx of workers during construction, operation and maintenance, and decommissioning phases (see Section 5.12.3); and
- cumulative effects (see Section 5.12.3).

1.2.22 Draft EN-1 NPS for Energy (EN-1), (Department for Energy Security and Net Zero (2023a) Makes the following (additional to the 2011 EN-1) points:

- In regard to the creation of jobs and training opportunities applicants may wish to provide information on the sustainability of the jobs created, including where they will help to develop the skills needed for the UK's transition to Net Zero.
- Socio-economic impacts may include the contribution to the development of low-carbon industries at the local and regional level as well as nationally**.**
- indirect beneficial socio-economic impacts for the region hosting the infrastructure, in particular in relation to use of local support services and supply chains should be considered.
- accommodation strategies should be developed where appropriate, especially during construction and decommissioning phases, that would include for the need to provide temporary accommodation for construction workers if required.
- the provision of additional local services and improvements to local infrastructure, including the provision of educational and visitor facilities.

1.2.23 The Draft National Policy Statement for Renewable Energy Infrastructure (EN-3) (Department for Energy Security and Net Zero (2023a) provides guidance on how seascapes should be assessed and in particular the need for the assessment to cover how people perceive and interact with the coast and seascape.

1.2.24 The (Draft) National Policy Statement for Energy was revised in 2022 to reflect the Government's commitment to deliver net zero by 2050, and to move away from the reliance on fossils fuels (BEIS, 2022). The revised draft suggests that all National Energy Infrastructure Projects should explicitly state how they contributing to minimise climate change.

National Planning Policy Framework

1.2.25 The *National Planning Policy Framework* (NPPF) (Ministry of Housing, Communities and Local Government (MHCLG 2019) emphasises that one of the overarching objectives of the planning system is to contribute to the achievement of sustainable development. This includes backing the transition to a low carbon future by supporting the transition to renewable and low carbon energy (and associated infrastructure).

1.2.26 Whilst the NPPF does not contain specific policy statements for nationally significant infrastructure projects, it does outline three overarching dimensions (for instance, economic, social and environmental) which are relevant. Two of these are especially pertinent to the socio-economic assessment:

- economic – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation, and by identifying and co-ordinating development requirements, including the provision of infrastructure, and
- a social role – supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations, and by creating a high-quality built environment with accessible local services that reflect the community's needs and support its health, social and cultural well-being.

1.2.27 The NPPF explains (in paragraph 148) that the planning system should support the transition to a low carbon future. In addition, NPPF states that the planning system should shape places in ways that contribute to radical reductions in greenhouse gas emissions; minimise vulnerability and provide resilience to the impacts of climate change; and support the delivery of renewable and low carbon energy and associated infrastructure.

The Marine Policy Statement 2011

1.2.28 The *Marine Policy Statement* (HM Government, 2011) states that properly planned developments in the marine area can provide environmental and social benefits as well as drive economic development, provide opportunities for investment and generate export and tax revenues. There are obvious social and economic benefits from such an increase in network capacity, most notably the facilitation of offshore renewable energy. There are also social and economic risks associated with such an increase in underwater cabling, which may affect activities such as dredging and the use of certain fishing gear, and impact on other sea users, including existing cable and pipeline operators. The marine plan authority should ensure, through integration with terrestrial planning, and engagement with coastal communities, that marine planning contributes to securing sustainable economic growth both in regeneration areas and areas that already benefit from strong local economies.

Local and sub-regional policy context

1.2.29 Whilst the application for development consent will be determined by the Secretary of State, local planning policy also includes material which is relevant to offshore windfarm developments, their relationships to local economic development, and the assessment of socio economic and recreation impacts associated with the proposed Rampion 2.

1.2.30 Both Coast to Capital Local Enterprise Partnership (C2CLEP) and South East Local Enterprise Partnerships (SELEP) cover large areas of Sussex. The entire cable corridor is located within the C2CLEP. Both LEPs have published policy documents that are relevant to the baseline assessment.

1.2.31 The relevant policy documents from West Sussex County Council (WSCC) and East Sussex County Council (ESCC), in addition to the Brighton & Hove City Council are also considered as part of the assessment. The proposed onshore cable corridor for Rampion 2 is located within the districts of Arun, Horsham and Mid Sussex. As such, the relevant local planning documents from these three District Councils have been considered.

1.2.32 Planning policy for the South Downs National Park (SDNP) is produced separately (by the South Downs National Park Authority (SDNPA)) and as such this is also considered within the baseline policy context assessment.

Socio Economics

1.2.33 National aspirations in relation to economic growth and employment creation are echoed in the strategic aims of key local organisations (including the Coast to Capital LEP (C2CLEP), South East Local Enterprise Partnership (SELEP), and local authorities.

1.2.34 C2CLEP's *Strategic Economic Plan* (SEP) (C2CLEP, 2018) identifies eight economic priorities. Of particular relevance to the development of Rampion 2 are:

- Priority 3: Invest in sustainable growth;
- Priority 5: Pioneer innovation in core strengths, and
- Priority 8: Build a strong national and international profile.

1.2.35 The C2CLEP identifies that energy generation is critical to the economy and emissions reduction targets should be achieved without sacrificing economic growth:

"The way energy is generated, distributed, and consumed is critical to the economy and our lives, and has a significant impact on our environment. The Climate Change Act sets a legally binding target of reducing emissions by at least 80 percent by 2050, which needs to be achieved without sacrificing economic growth. There is evidence this is already happening; energy use and emissions are falling while the economy continues to grow. However there still needs to be a significant transition to a low carbon economy to meet these targets. Coast to Capital is well placed to drive this having developed a local energy strategy in partnership with South East Local Enterprise Partnership and Enterprise M3. The area already has a range of projects taking place, such as community owned renewable energy cooperatives, the Rampion Wind Farm, and local government investment into large scale solar farms" (C2CLEP, 2018).

1.2.36 The *Local Energy Strategy* (C2C, EM3 and SELEP, 2018) prepared for the C2CLEP, SELEP and Enterprise M3 LEP, states that the wider South East region will prioritise renewable generation, which is identified as one of five priority themes of the strategy. Offshore wind development sits under renewable generation as a 'project model' of the strategy. The 'project model' states that further inward investment and economic development of the South East of England's offshore wind industry will be encouraged. This is because offshore wind opportunities for the tri-LEP area exist with Crown Estate block release in coming years and the LEPs will be a key facilitator in commercialising and supporting supply chain infrastructure developments. Furthermore, they cite the

general growth in the UK offshore wind industry over recent years as a major reason for investment.

1.2.37 Both SELEP and C2CLEP areas cover the port of Newhaven, which is the current operation port for Rampion 1. An enterprise zone is located in Newhaven, Newhaven Enterprise Zone comprises eight key development sites in the centre of Newhaven, a port town east of Brighton and part of the Greater Brighton city region. The aim of the Enterprise Zone (EZ) is to address issues of business space, affordability and suitability which are key issues for the Greater Brighton economy, and act as a catalyst for the wider regeneration of Newhaven. Key aims of the enterprise zone which are particularly relevant include:

- to prioritise investment in transport plans;
- to support local housebuilders to create high-quality housing developments;
- work with partners to deliver key projects around reducing the amount of carbon released into the environment;
- enable the local community to access funds to enhance the local area;
- grow the cultural economy in the town;
- build on the legacy of the town and its vibrant community;
- to establish strong localised business networks and encourage collaboration across sectors and supply chains;
- to deliver better-quality employment opportunities for local people;
- to promote Newhaven as a deep-water port and hub for maritime industries; and
- to encourage the local community to apply to the Newhaven EZ Community Fund for support projects that will encourage a sense of place.

1.2.38 SELEP's *Strategic Economic Plan* (SELEP, 2014) sets out the following growth ambitions for the LEP area:

- to enable the creation of 200,000 sustainable private sector jobs over the decade to 2021, an increase of 11.4 percent since 2011;
- deliver 100,000 new homes by 2021, which will entail, over seven years, increasing the annual rate of completions by over 50 percent by comparison with recent years; and
- leverage investment totalling £10 billion, to accelerate growth, jobs and homebuilding.

1.2.39 SELEP's SEP cited the opportunity for investment in renewable energy via Rampion Offshore Wind Farm. Specifically, the Newhaven Clean Tech and Maritime Growth Corridor would benefit from Rampion's operation and maintenance port. They sought to work with other LEPs to development skills for growing the offshore wind sector.

1.2.40 The strategic objectives set out in the LEPs' policy documents are underpinned by the Core Strategies/ Local Plans of its constituent local authorities. The following

section summaries the strategies / plans that are particularly relevant for the proposed development of Rampion 2, based on the onshore temporary cable corridor area and the location of ports in Sussex (and therefore areas which may benefit from the construction and operation and maintenance of Rampion 2).

1.2.41 At the County level, the *West Sussex Plan* (WSCC, 2017) sets out several priorities that are particularly relevant to the construction of a new offshore windfarm, including:

- a prosperous place – at the heart of this priority is attracting / supporting businesses and people who want to work in the county and then giving them the tools they need to grow their businesses; and
- a strong safe and sustainable place – West Sussex are determined to become one of the largest renewable energy providers in the UK.

1.2.42 SELEP published an Economic Recovery and Renewal Strategy in March 2021. The document sets out how SELEP will support a path to recovery and renewal and to make clear the opportunities and needs of the SELEP area. The aim of the strategy is to ensure the survival and stability of the LEP's economy in the short term and to drive sustainable economic renewal and growth in the medium to long term. SELEP seek to do this by focusing on four strategic priorities which reflect its unique geography, assets and opportunities:

- Business Resilience and Growth;
- UK's Global Gateway;
- Communities for the future; and
- Coastal Catalyst.

1.2.43 Key objectives include the need to 'put clean growth at the heart of what we do' and 'promote greater resilience in our places'.

1.2.44 The *West Sussex Economic Growth Plan* (WSCC, 2018a) is designed to help achieve the County Council's vision for West Sussex laid out within the West Sussex Plan. The Economic Growth Plan 2018 – 2023 sets out five priority themes. Of particular relevance are:

- strengthening the coastal towns – strengthening the vibrancy of the coastal towns, and supporting the emergence of a creative coast;
- growing the green energy county – embedding the green energy sector in the county, providing a platform for innovation and a new economic identity for West Sussex;
- promoting West Sussex as a place to visit and work – enhancing and marketing the West Sussex experience, and supporting the vibrancy of the county; and
- enabling a workforce for the future – supporting a high-quality and enterprising workforce, that meets current and future business needs.

1.2.45 The Growth Plan notes that '*The Rampion Wind Farm and Your Energy Sussex partnership are evidence that the county is one where new and innovative approaches to energy efficiency and generation can be successfully implemented.*

Expanding this opportunity sector could therefore place West Sussex as a national green energy lab, and further support specialist manufacturing activity, ultimately driving income generation and growth'.

1.2.46 The West Sussex Economy Reset Plan 2020 to 2024 (WSCC, 2020b) is an update of the Economic Growth Plan 2018-2023 and sets out the priorities for supporting the recovery of the West Sussex economy following the pandemic. The strategy is built around nine themes including spatial economic challenges, key sectors and opportunities to embrace such as digital and green technologies. Theme 9 – Embed Climate Change and the Environment into the Reset' states:

- *Progress economy reset activities in support of the Climate Change Strategy, initially focussing on `green skills and jobs` as part of the employment and skills theme, and growing the low carbon and environmental goods and services sector through LoCASE.*

1.2.47 The *East Sussex Growth Strategy* 2014 to 2020 (ESCC, 2014b) sets out the strategy for economic growth in Sussex between 2014 and 2020. The strategy is built around three pillars: Business, Place and People. The strategy identifies the following indicators which capture the aspirations of East Sussex:

- contribute to unlocking key employment floor space allocated in Local Plans;
- achieve average annual housing completions of 1,504 in East Sussex to 2020, in accordance with our Local Plans;
- increase Gross Value Added (GVA) per capita by 20 percent by 2020;
- maintain the employment rate for East Sussex at a higher level than the England rate to 2020;
- maintain the JSA claimant rate for East Sussex at below the England rate to 2020;
- increase the percentage of working age residents in East Sussex with a level 4 (degree) qualification to at least 35 percent by 2020; and
- reduce the percentage of working age residents in East Sussex with no qualifications and qualified only to NVQ1 to below the England level by 2020.

1.2.48 Team East Sussex (Team East Sussex, 2020) has produced a comprehensive Strategic Action Plan in response to the COVID-19 pandemic. The Action Plan lays out six missions, many of which have significant relevance to Rampion 2.

- Mission 1 - Thinking local, acting local - initiating a Buy Local supply chain programme across all business sectors. Reduce commuting and to encourage businesses of all kinds to consider relocating to East Sussex. A newly launched Business Hothouse programme will provide support to embryonic entrepreneurs currently looking to start a business.
- Mission 2 - Building skills, creating jobs - urgently need to retain our local skills, support employment and grow an agile workforce with greater skills levels. Offer targeted support for the development of sector specific skills, and for furloughed and redundant employees, in conjunction with employers and skills providers. Working with education to deliver training, including basic skills, short courses and digital skills programmes for tomorrow's workforce. Plans

include work academies to help young people into employment, and new courses and learning packages for businesses to aid their recovery and growth.

- Mission 4 - Better places, fuller lives - need to shape the County for a sustainable, inclusive and resilient future. Already secured substantial amounts of money through the Local Growth, Getting Building and Growing Places Funds, all of which will help provide jobs and growth across the county.
- Mission 5 - Cleaner energy, greener transport - want to make sure the 'Reset' takes account of the drive towards a low-carbon, circular economy. planning ways in which clean energy technologies and de-carbonisation projects can be accelerated. Created an energy retrofit programme for local suppliers to help them reduce their costs and emissions.
- Mission 6 - The future is digital - grow digital connectivity to support the transformation of business and the local economy. continue to invest in fast broadband for businesses and homes throughout East Sussex. Developing proposals for those working from home to help reduce energy and unnecessary commuting, and to keep our communities livelier during the working week.

1.2.49 The *Brighton & Hove City Plan Part 1* (Brighton & Hove City Council, 2016) provides the overall strategic and spatial vision for the future of Brighton & Hove through to 2030. The policies in all the other Development Plan Documents for Brighton & Hove have to be in line with the City Plan Part 1, therefore it is the most important Development Plan Document.

1.2.50 Strategic objectives of particular relevance to the development of Rampion 2 include the following.

- SO1 - Ensure that all major new development in the city supports the regeneration of the city, is located in sustainable locations, provides for the demands that it generates and is supported by the appropriate physical, social and environmental infrastructure.
- SO3 - Develop Brighton & Hove as a major centre on the South Coast for sustainable business growth and innovation, creative industries, retail provision, tourism and transport.
- SO6 - Through joint working with Adur District Council, WSCC and the Shoreham Port Authority, maximise the potential of Shoreham Harbour for the benefit of existing and future residents, businesses, port-users and visitors through a long-term regeneration strategy.
- SO7 - Contribute to a reduction in the ecological footprint of Brighton & Hove and champion the efficient use of natural resources and environmental sustainability.
- SO19 - Contribute towards the delivery of more sustainable communities and the reduction of inequalities between neighbourhoods in Brighton & Hove.
- SO22 - Across the city apply the principles of healthy urban planning and work with partners to achieve an equality of access to community services (health and learning), to opportunities and facilities for sport and recreation and lifelong

learning. Ensure pollution is minimised and actively seek improvements in water, land and air quality and reduce noise pollution.

1.2.51 There are opportunities to consider small scale renewable energy provision such as solar and wind energy technologies along the seafront. The *Brighton & Hove Energy Study* (AECOM, 2018) has identified particular potential for District Heating networks in and around the seafront within a long list of priority areas. Development within the long list of priority areas will be encouraged to consider low and zero carbon decentralised energy, in particular heat networks. Developments will be required to either connect where a suitable system is in place, or would be at the time of construction, or design systems so that they are compatible with future connection to a network.

1.2.52 As identified in the *Horsham District Planning Framework* (Horsham District Council, 2015), the Local Plan for Horsham seeks to:

- ensure that future development in the district is based on sustainable development principles that strike the correct balance between economic, social and environmental priorities;
- meet employment needs, create opportunities to foster economic growth and regeneration, and maintain high employment levels in the district which help reduce commuting distances; and
- ensure that new development minimises carbon emissions, adapts to the likely changes in the future climate and promotes the supply of renewable, low carbon and decentralised energy.

1.2.53 The *South Downs Local Plan* (SDNPA, 2019) sets out the planning polices for the national park area which stretches from Eastbourne in East Sussex, through Brighton & Hove, to Chichester in West Sussex and beyond into Hampshire. At the heart of the plan is the need to nurture and protect the national park so that it can be enjoyed by this generation and future generations, all while providing for the socio-economic needs of communities that live and work in the national park. The plan sets out nine strategic objectives in order to move towards achieving the 2050 vision for the national park. The following objectives are of particular relevance to the assessment:

- to achieve a sustainable use of ecosystem services thus enhancing natural capital across the landscapes of the National Park and contributing to wealth and human health and wellbeing;
- to protect and provide opportunities for everyone to discover, enjoy, understand and value the National Park and its special qualities;
- to adapt well to and mitigate against the impacts of climate change and other pressures;
- to conserve and enhance the villages and market towns of the National Park as thriving centres for residents, visitors and businesses;
- to protect and provide for the social and economic wellbeing of National Park communities supporting local jobs, affordable homes and local facilities; and

- to protect and provide for local businesses including farming, forestry and tourism that are broadly compatible with and relate to the landscapes and special qualities of the National Park.

1.2.54 The *Arun Local Plan* (Arun District, 2018) sets out the vision for the Arun District to 2031 and beyond. The Local Plan states that economic growth for job creation is Arun's number one priority. This will be achieved by encouraging employment growth in sectors including manufacturing and marine based activities. Policy ECC DM1 Renewable Energy will support renewable energy development subject to the criteria in this Policy. Schemes will be expected to contribute to the social, economic and environmental development and overall regeneration of the District.

1.2.55 In 2021, Arun District Council agreed to review their District Plan to review the vision, objectives and housing targets. In October 2022, the Arun Local Plan review was suspended following signals from the Secretary of State for Levelling Up, Housing and Communities that there would be changes to the Planning Bill.

1.2.56 Arun District Council Developed a Carbon Neutral Strategy in 2020 that states a commitment to reduction in fossil fuels and to track options for investments in locally generated renewable energies.

1.2.57 The vision for the *Mid Sussex District Plan* (Mid Sussex District Council, 2018) is underpinned by four priority themes that promote the development of sustainable communities: Protecting and enhancing the environment; Promoting economic vitality; Ensuring cohesive and safe communities; and, Supporting healthy lifestyles. To provide opportunities for people to live and work within their communities, reducing the need for commuting.

Tourism & recreation

1.2.58 Local planning policy includes material which is relevant to the assessment of tourism impacts associated with the proposed Rampion 2.

1.2.59 The visitor economy is particularly important to the SELEP's rural and coastal communities. The landscape of the south-east is praised for its diversity and environment. With two major Areas of Outstanding Natural Beauty (AONB), a thriving agribusiness sector provides opportunities to improve, enhance and conserve the natural environment. This, in turn, leads to improved tourism and health benefits from recreation, while maintaining an attractive place to live and work of the kind sought after by many leading businesses.

1.2.60 One of the consequences of the decline of the visitor economy in some of these areas has been the inward migration of low-income residents, often dependent on benefits and including some with drug and alcohol problems, and ex-offenders into accommodation previously used by the tourism sector, such as hotels. Other coastal towns have a port focus – Harwich, Dover, Tilbury, Folkestone and Newhaven, although they have similar deprivation levels despite contrasts in the fortunes of their ports. Others are more prosperous and contain high proportions of retirees. There is a need to establish an intervention fund to upgrade and expand tourist accommodation and facilities to better exploit the growth potential of the tourism sector.

1.2.61 The Sussex Visitor Economy Vision and Medium Term Actions was produced in July 2021 (Sussex Visitor Economy, July 2021) and sets out the priorities for the next decade. The plan states the following:

- *By 2030 Sussex will have built a year-round sustainable visitor economy as big as Wales. A place that puts the wellbeing of people and the environment at the heart of everything it does, where locals nurture what makes it special and proudly share those qualities with visitors.*
- *It will attract more higher value discerning international and domestic visitors looking for a short break as well as organisers of business events, meetings and conferences.*

1.2.62 The *West Sussex Economy Reset Plan* (WSCC, 2020) draft local plan recognises that the tourism sector has been particularly hard hit by the pandemic and in response a key theme (theme six of the plan) is to protect and revive tourism and the visitor economy. The plan states the following.

- *'The sector is an important asset and contributor to the 'place' of West Sussex, drawing on the distinctive high quality natural environment, contributing to quality of life and health and well-being, the character and distinctiveness of the county, and the attractiveness to businesses and employees, and so has a wider contribution than the immediate economic contribution and associated jobs.'*
- *'Sustainable and responsible tourism should underpin the approach to help secure for the longer term the environmental gains from the COVID-19 crisis, such as improvements in air quality, increased access to nature and increased use of sustainable active travel.'*

1.2.63 The *West Sussex Rights of Way Management Plan* (WSCC, 2018b) sets out WSCC's approach to managing the PRoW network between 2018 to 2028, and sets out the following commitments and ambitions for PRoW in the county:

- to provide the least restrictive access, preferring gaps over gates, and gates over stiles;
- to work closely with the SDNPA to achieve a high-quality PRoW and access network; and
- protect (path) users' rights and their convenience.

1.2.64 The *East Sussex Cultural Strategy* (ESCC, 2014a) prioritises tourism under priority 2. This priority seeks to develop and promote the cultural tourism offer, raise its profile and attract more visitors and businesses. East Sussex aims to have a high value visitor economy and have a distinctive offer by being renowned for its natural assets, heritage, culture, market and coastal towns.

1.2.65 The *Brighton & Hove City Plan* (Brighton & Hove City Council, 2016) aims to have a year-round profitable tourism industry and a world class cultural and heritage offer. The following strategic objectives are particularly relevant to the development of the tourism industry:

- SO3 - Develop Brighton & Hove as a major centre on the South Coast for sustainable business growth and innovation, creative industries, retail provision, tourism and transport.
- SO5 - Maintain and strengthen the role of Brighton city centre, improve its attractiveness and recognise and protect its unique cultural, tourism and retail mix and look to diversify the evening economy and leisure function.
- SO13 - Enhance and maintain the distinctive image, character and vibrant, varied heritage and culture of the city to benefit residents and visitors. Support the role of the arts, creative industries and sustainable tourism sector in creating a range of high-quality infrastructure support facilities, spaces, events and experiences.
- SO17 - Enhance the seafront as a year-round place for sustainable tourism, leisure, recreation and culture whilst protecting and enhancing the quality of the coastal and marine environment.

1.2.66 The *Horsham District Planning Framework* (Horsham District Council, 2015) argues that there is a need for Horsham to enhance its rural economy. This can be achieved (in part) by maximising visitor spending through tourism across the district. Through local planning policy Horsham seeks to promote the district as an attractive place to stay and visit to increase the value of the tourism economy whilst protecting the areas cultural resource.

1.2.67 The *South Downs Local Plan* (SDNPA, 2019) has ecosystem services as the central aspect of the plan. Cultural services form a key pillar of ecosystem services. The plan seeks to promote sustainable tourism which can deliver economic benefits whilst protecting the landscape and special qualities of the national park. This includes safeguarding views.

1.2.68 Strategic Policy SD 20 Walking, Cycling and Equestrian Routes argues that proposals will be permitted provided that they maintain existing public rights of way and conserve (and enhance) the amenity value and tranquillity of the South Downs National Park.

1.2.69 The *Arun Local Plan* (Arun District, 2018) seeks to '*create vibrant, attractive, safe and accessible towns and villages that build upon their unique characters to provide a wide range of uses and which are a focus for quality shopping, entertainment, leisure, tourism and cultural activities'*. The Local Plan has been suspended after the Secretary of State for Levelling Up Housing and Communities suggested that there would be changes to the planning framework.

1.2.70 In the current local plan 2018 Policy TOU SP1 - Sustainable tourism and the visitor economy within the *Arun Local Plan* states that '*sustainable tourism development will be encouraged where it protects as well as promotes the main tourism assets of:*

- *the waterfronts – the coast, rivers and estuaries,*
- *the complimentary visitor uses of the fertile coastal plain in conjunction with agriculture, and*

- *the backdrop and access for visitors to the South Downs National Park with the historic town of Arundel as it's focal point, that make the District attractive to visitors'.*

1.2.71 Proposals for visitor related development will be determined by Arun's capacity to absorb such growth, which for Arun this means tourism growth which:

- encourages long-term visitor interest / activity;
- ensures a viable visitor economy;
- provides benefit to local people;
- extends the visitor season; and
- protects and enhances the natural and built environment of Arun

1.2.72 The *Mid Sussex District Plan* (Mid Sussex District Council, 2018) promotes sustainable tourism, which will contribute to the sustainable growth of the rural economy and enhances the quality of life and the character and landscape of the district.

1.3 Baseline Analysis

1.3.1 The baseline analysis for the socio-economic assessment is mostly desk-based, drawing primarily on a range of published datasets and research reports. It describes the socio-economic characteristics of the study area by exploring socio-economic indicators that are particularly relevant to the selected receptors.

1.3.2 The key sources of data used to assess the baseline environment include the policy documents set out in the previous section, and the relevant national datasets from the Office for National Statistics (ONS) providing data on population, labour market and employment base conditions at the national and local levels. Where data is not available at the UK level (for example, ONS employment data is available for Great Britain (GB) rather than the UK) this is clearly stated.

1.3.3 The analysis draws on the most up-to-date sources available in December 2022 for all key socio-economic and recreation indicators, although the year that the data relates to varies according to the release calendar for each dataset. The baseline year for all socio-economic and recreation indicators is referenced throughout the chapter and stated in the table below.

1.3.4 It should be noted that the impacts of the pandemic are reflected in a number of the data sets in the baseline. This section provides an explanation of the changes brought about by the pandemic.

1.3.5 The baseline analysis has also been informed by a walkover survey along the cable corridor conducted in August 2020. The purpose of the survey was to understand the nature and context of the key onshore recreation assets, in addition to their level of use. In April 2023, a further two days was spent walking key recreational assets along the revised route. As before, the survey was to understand the nature and context of the assets; indicate usage levels; 'ground-truth' information from desk studies; and look for otherwise unrecorded assets.

Table 1-1 Key Data Sources for Baseline Indicators

Indicator	Source	Timeframe coverage of data	Summary	Coverage of Study Area
GVA	Sub-national GVA	1998 to 2021	Current position and trends in the following for relevant study areas: 1) total GVA; 2) GVA in sectors of interest; 3) GVA per head; and GVA per worker.	Local authority boundaries (including full coverage of Sussex).
Employment & Industry breakdown	Business Register and Employment Survey (BRES)	2009 to 2015 and 2015 to 2021	Current position and long-term trends in: 1) total employment (including full-time equivalent (FTE) employees); 2) sectoral mix; and 3) employment in relevant sectors: (i) energy sector, (ii) construction and manufacturing sectors relevant to offshore wind, (iii) tourism, (iv) ports and maritime activity, and (v) recreation activity.	Local authority boundaries (including full coverage of Sussex).

Indicator	Source	Timeframe coverage of data	Summary	Coverage of Study Area
Population	Population Estimates	2001 to 2020	Tracks population position at a national to local authority level and compares population growth to ten years ago.	Local authority boundaries (including full coverage of Sussex).
Population	Sub-National Population Projections	2018 to 2041	Projected total and working age population.	Local authority boundaries (including full coverage of Sussex).
Economic activity, Employment rate & unemployment	Annual Population Survey	2004 to 2022	Current position and long-term trends in: 1) the local labour market including (i) economic activity, (ii) employment, and (iii) unemployment; 2) qualifications; and 3) occupations.	Local authority boundaries (including full coverage of Sussex).
Tourist visitor numbers	Local / regional tourism surveys	Latest available (referenced in ES)	Annual estimates of volume and value of tourism activity (day visitors and staying visitors); accommodation occupancy surveys.	Brighton & Hove and Sussex
Economic activity – Tourism	Economic Impact of Tourism	Latest available	Volume and value of tourism economy and the impact of visitor	Brighton & Hove and Sussex

Indicator	Source	Timeframe coverage of data	Summary	Coverage of Study Area
		(referenced in ES)	expenditure on the local economy	
Onshore Recreational Assets	Ordnance Survey (OS) Explorer maps OL10 and OL11	May 2020	Identifies recreational assets onshore	Onshore DCO boundary study area
Onshore Recreational Assets	MAGIC – Multi-agency Geographic Information for the Countryside	May 2020	Used to identify the full suite of formally defined access and recreation assets, ranging from Access Land to Millennium Greens	Onshore DCO boundary study area
Onshore Recreational Assets	Google Earth	May 2020	A basic understanding of the recreation geography and identify any assets not recorded on the OS sheets or MAGIC.	Onshore DCO boundary study area
Onshore Recreational Assets	Natural England – Green Infrastructure map	April 2023	Used to cross-check and verify previously used datasets for completeness and accuracy.	Onshore DCO boundary study area
Onshore Recreational Assets involving rivers	On-line searches onshore	May 2020	Used to identify recreational pursuits involving the Rivers Arun and Adur. Both rivers are used for swimming	River Arun from Littlehampton to Arundel.

Indicator	Source	Timeframe coverage of data	Summary	Coverage of Study Area
			events and angling. Both are tidal into the study area and small boats, especially canoes, kayaks and SUP use both rivers.	River Adur from Steyning to Henfield.
Inshore Recreational Assets	On-line searches inshore	May 2020	Used to identify recreational pursuits in the vicinity of Climping Beach. While the beach is recognised to be quieter than most on this stretch of coast, it is used regularly by windsurfers and kite surfers. At least one kite surfing school uses the beach for lessons.	Inshore at Climping Beach.
Economic Impact – Tourism	Economic studies	Latest available	Volume and value of tourism economy and the impact of visitor expenditure on the local economy	Brighton & Hove & Sussex
Onshore recreation	WSCC	May 2020	Indication of the significant recreational assets that may be affected	Onshore DCO boundary study area.

Indicator	Source	Timeframe coverage of data	Summary	Coverage of Study Area
Onshore recreation	SDNPA	May 2020	Indication of the significant recreational assets that may be affected, plus list of third-party events known to take place on countryside assets.	Onshore part of the DCO boundary study area through the SDNP – approximately 33% of total route.
Onshore recreation	WSCC	November 2020 & December 2022	User data for Downs Link (2020) and data refresh (2022)	Onshore DCO boundary study area.
Onshore recreation	SDNPA	November 2020 & December 2022	User data for South Downs Way (2020) and data refresh (2022)	Onshore DCO boundary study area.
Onshore recreation	Natural England	November 2020	No data available for Climping but data supplied for other coast path sections.	Landfall area only.
Onshore recreation	BEKS Kitesurfing School	November 2020	Data about numbers and frequency of use of Climping beach.	Landfall DCO boundary area only.
Onshore recreation	Aspire	November 2020	Route of annual River Arun swim	River Arun crossing point only.
Onshore recreation	West Sussex Interactive Map	November 2020 – June 2023	Online digital version of the definitive map of public rights of way used to	Onshore DCO boundary study area.

Indicator	Source	Timeframe coverage of data	Summary	Coverage of Study Area
			identify PRoW in the study area.	
Onshore recreation	MAGIC	November 2020	Used to identify the full suite of formally defined access and recreation assets, ranging from Access Land to Millennium Greens	Onshore DCO boundary study area.
Onshore recreation	Google Earth	May 2020	A basic understanding of the recreation geography and identify any assets not recorded on the OS sheets or MAGIC.	Onshore DCO boundary study area.
Onshore recreation	On-line searches onshore	November 2020	Used to identify recreational pursuits involving the Rivers Arun and Adur. Both rivers are used for swimming events and angling. Both are tidal into the study area and small boats, especially canoes, kayaks and SUP use both rivers.	River Arun from Littlehampton to Arundel. River Adur from Steyning to Henfield.
Onshore recreation	On-line searches onshore	November 2020	Used to identify public events taking place on assets within the	Onshore DCO boundary study area.

Indicator	Source	Timeframe coverage of data	Summary	Coverage of Study Area
			cable corridor and its zone of influence.	
Onshore recreation	On-line searches inshore	November 2020	Used to identify recreational pursuits in the vicinity of Climping Beach. While the beach is recognised to be quieter than most on this stretch of coast, it is used regularly by windsurfers and kite surfers. At least one kite surfing school uses the beach for lessons.	Inshore at Climping Beach.
Onshore recreation	Recreational activity	Latest available	Data on use of offshore and related onshore recreational resources close to offshore wind farm infrastructure and the export and onshore cable corridor route.	Onshore DCO boundary study area.

Study Area

1.3.6 The Study Area for the baseline assessment is based on an aggregation of East Sussex, West Sussex and Brighton & Hove Unity Authority area (to correspond with the historic county of Sussex) and will henceforth be referred to as Sussex. Where appropriate, a detailed breakdown for East Sussex, West Sussex and Brighton & Hove, as well as districts within Sussex is also included. Data for the UK (or GB where UK data is not available) is also presented as a wider comparator to provide additional context to the various indicators used. Where both UK and GB data is unavailable, data for England is used instead.

Economy

Employment

1.3.7 Data from the ONS indicates that, in 2021, there were approximately 704,000 jobs (total employment) in Sussex, which equates to an estimated 581,000 FTE jobs. Employment density in Sussex is around 674 jobs for every 1,000 working age residents, which is below the national average by 51 jobs for every 1,000 residents (**Table 1-2**). Within Sussex, West Sussex provides more jobs than East Sussex and Brighton & Hove combined, with 377,000 jobs equating to around 313,000 FTE employee jobs. West Sussex has a higher employment density than East Sussex and Brighton & Hove, with 748 jobs per 1,000 working aged residents (compared with 563 jobs per working age residents in East Sussex and 664 jobs per working aged resident in Brighton & Hove). It should be noted that the latest ONS employment data generally shows decreased levels of employment to the levels presented at Preliminary Environmental Information Report (PEIR) (2019 employment). This is largely due to the impacts of the pandemic.

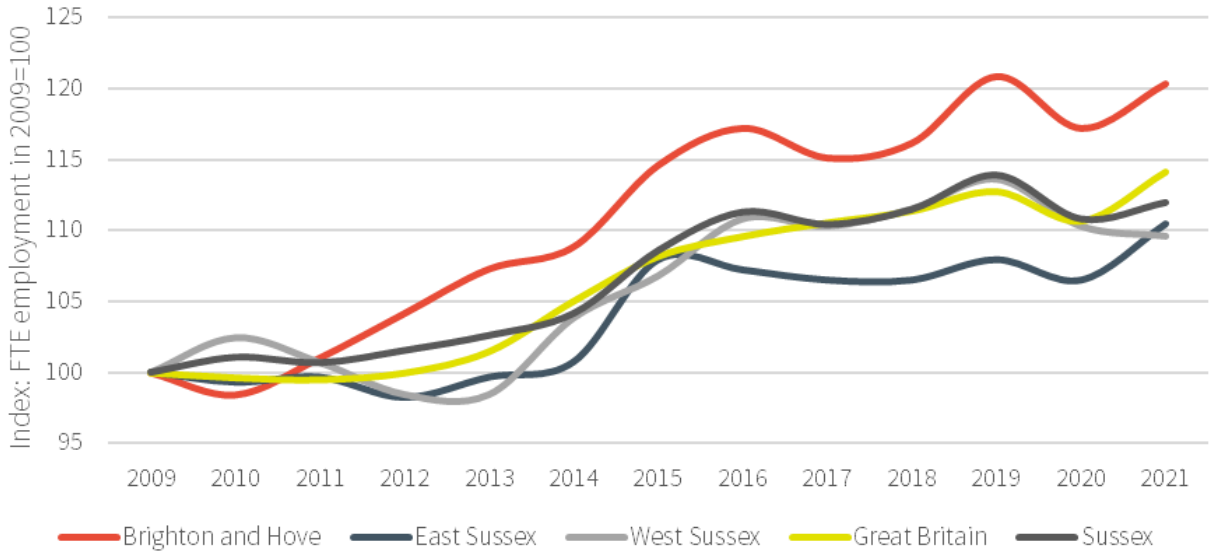
Table 1-2 Employment (2021) and Employment density (2020) Sussex,

Area	Total Number of Jobs (000s)	FTE Employees (000s)	Employment Density (Jobs per 1,000 working age residents)*
West Sussex	377	313	748
East Sussex	187	153	563
Brighton & Hove	141	116	663
Sussex	704	581	674
Great Britain	30,381	25,543	725

Source: ONS (2022b). Please note: Numbers are rounded to nearest 500.
*ONS, (2021b) due to unavailability of 16-64 aged population data for the latest census this is presented for 2020.

1.3.8 Since 2010, the Sussex economy grew by around 57,000 FTE jobs (11 percent), with the annual change in job numbers slightly behind the national trend (15 percent growth in Great Britain since 2010). The highest percentage growth was seen in Brighton & Hove which experienced an FTE growth of 22 percent since 2010. The latest year (2021) showed a slight decline in West Sussex with a 1% fall in employment compared to increases regionally and nationally.

Figure 1-1 Annual Change in Estimated FTE Employees, 2009 to 2021.



Source: ONS, (2022b)

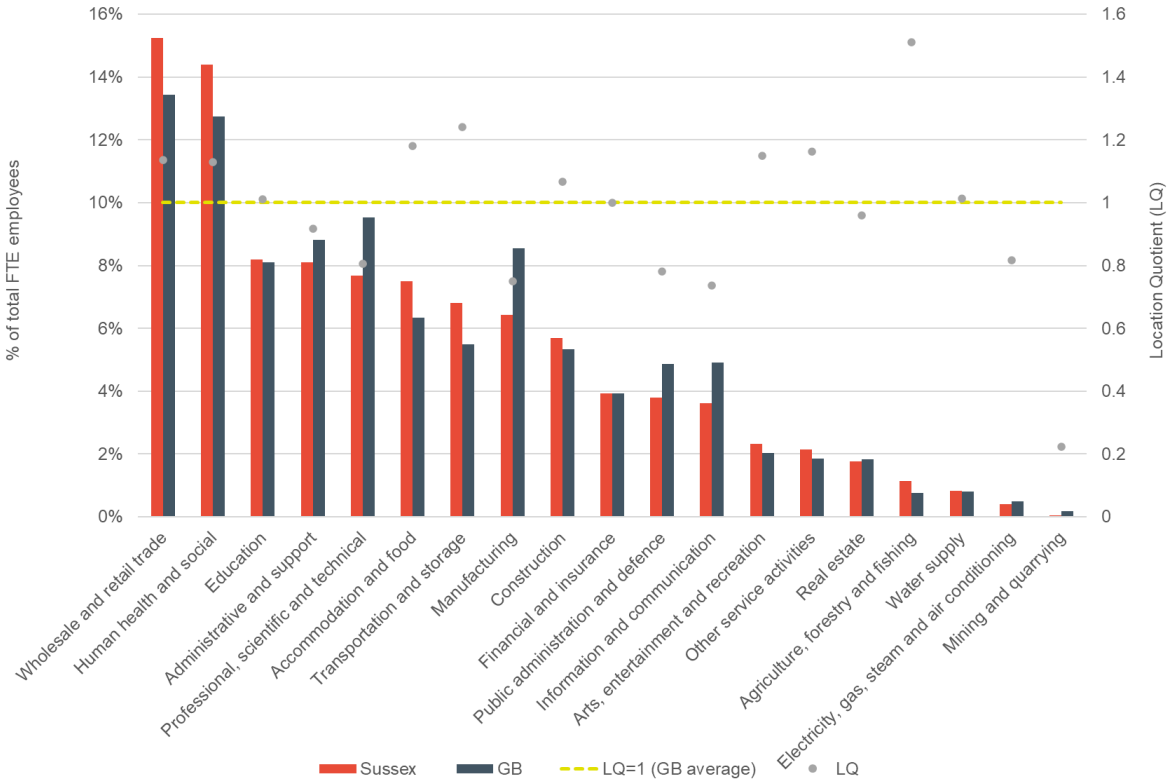
Sectoral distribution of jobs

1.3.9 Analysis of FTE employees by sector highlights the importance of wholesale & retail, health & social work and education to the Sussex economy. These sectors are more concentrated locally than is the case nationally and together represent 40 percent of all FTE jobs in Sussex.

1.3.10 In the context of offshore windfarms, construction, manufacturing, professional services and hospitality sectors are particularly important. The accommodation & food and construction sectors are more concentrated in Sussex than nationally, with a location quotient[1] (LQ) of 1.2 and 1.1 respectively. Manufacturing and professional services are less concentrated in Sussex than the UK average (both with LQs of 0.8).

[1] Location quotient measures the concentration of employment within a sector in a local area relative to the national average.

Figure 1-2 Sectoral distribution of FTE employees, 2021



Source: ONS, (2022b). Please note: GB data is used instead of UK as UK data is not available. Hatch calculations are used to estimate the FTE level.

Supply chain capacity and capability

1.3.11 Compared to other areas of the country (such as off the coast of East Anglia and the North East coast of England) Sussex has seen limited offshore wind development over the past decade, with current offshore wind development limited to Rampion.

1.3.12 Although the county's offshore wind supply chain is currently undeveloped, this is likely to grow over time as offshore wind farms along the south coast, the wider region and nationally are expanded (for example, Rampion 2) and built-out. The industry is generally expected to expand as it has been earmarked for growth in government policy over recent years, with the latest target being to have up to 50GW of generation capacity by 2030.

1.3.13 Given the recent development of the offshore wind industry in Sussex, there may be opportunities for businesses across several sectors to benefit from the construction and operation and maintenance activities related to Rampion 2. Employment data for Sussex suggests a number of key supply chain sectors are currently undeveloped and account for a small share of jobs (see **Table 1-3**).

Table 1-3 Employment in Key Strategic Sectors, 2021

Sector	GB employment (FTEs)		Sussex Employment (FTEs)		
	Number (000s)	Percent	Number (000s)	Percent	Sussex LQ
Manufacturing	2,185	9%	37	6%	0.75
Construction	1,361	5%	33	6%	1.07
Land based transport	525	2%	10	2%	0.80
Civil Engineering	180	1%	4	1%	1.02
Energy Generation	128	1%	2	0%	0.82
Marine Transport	14	0%	0	0%	0.35

Source: ONS, (2022b).

Gross Value Added (GVA)

1.3.14 ONS data indicates that Sussex contributed just over £41.0 billion GVA to the UK economy in 2020.

1.3.15 GVA per head of population data shows a significant gap between Sussex and the UK, with GVA per head in Sussex being 18 percent below the national average (or approximately £23,900 per head compared with £29,100 per head nationally).

1.3.16 East Sussex sits far below the national average, with a GVA per head of £16,700. This reflects the presence of low skilled occupations locally, and the sectoral composition within the employment base as well as the nature of the area. East Sussex is more of a residential area and does not have any major economic centres (so GVA is low but population is high) and the population is older and so has higher numbers of retired people living in the area. As the centre of economic activity in Sussex, Brighton & Hove is an exception with a GVA per head of £30,200, which is over the national average. This can be explained by the presence of higher-value jobs in the city. Brighton & Hove is the reverse to East Sussex. The GVA is influenced by the fact it has a high ratio of jobs to residents because it attracts people from elsewhere (e.g. East Sussex).

1.3.17 This data reflects a more up to date picture than was presented at PEIR (which presented data for 2018), 2019 data showed a normal trend with increases in GVA however the Covid-19 restrictions impacted on the economic value generated across the country and saw a decline in GVA from 2019 levels. As a result the

2020 GVA figures as generally only marginally higher than 2018 figures presented in the PEIR.

1.3.18 GVA per FTE job data (which is a strong indicator of productivity) shows that Sussex has a GVA per FTE job of £71,400. This sits below the national average of £78,700 but is very similar to the national average when London is excluded (£72,700). Within Sussex Brighton is the most productive area with a higher level GVA per FTE job than both West Sussex and East Sussex. This is for many of the same reasons as mentioned above in the commentary on GVA per head related to centres of economic activity and the nature of the value of jobs within centres of economic activity.

Table 1-4 GVA (2020), GVA per head and GVA per FTE job

Area	Total GVA (£ million)	GVA per head	GVA per FTE
West Sussex	£22,844	£26,300	£72,500
East Sussex	£9,350	£16,700	£63,600
Brighton & Hove	£8,800	£30,200	£78,200
Sussex	£40,994	£23,900	£71,400
UK	£1,949,605	£29,100	£78,700
UK excl. London	£1,479,320	£25,500	£72,700

Source ONS (2022c). Please Note: GVA estimates are rounded to the nearest million £. GVA per head and GVA per FTE are rounded to the nearest £100.

Population

1.3.19 Sussex has a total population of around 1.72 million people, of whom 980,000 (or 57 percent) are of working age (aged 16 to 64). Nationally, the proportion of residents between 16-64 is slightly higher (at 59 percent). Within Sussex, there is significant variation in the proportion of working residents between Brighton & Hove (69 percent) and East and West Sussex (53 percent and 55 percent respectively).

Table 1-5 Population - Total and Working Age, 2020

Area	Population (000s)	Working Age Population (aged 16 to 64) (000s)	Working Age Population as a percentage of the Total
West Sussex	868	480	55
East Sussex	559	298	53
Brighton & Hove	292	202	69
Sussex	1718	39878	59
UK	67081	980	57

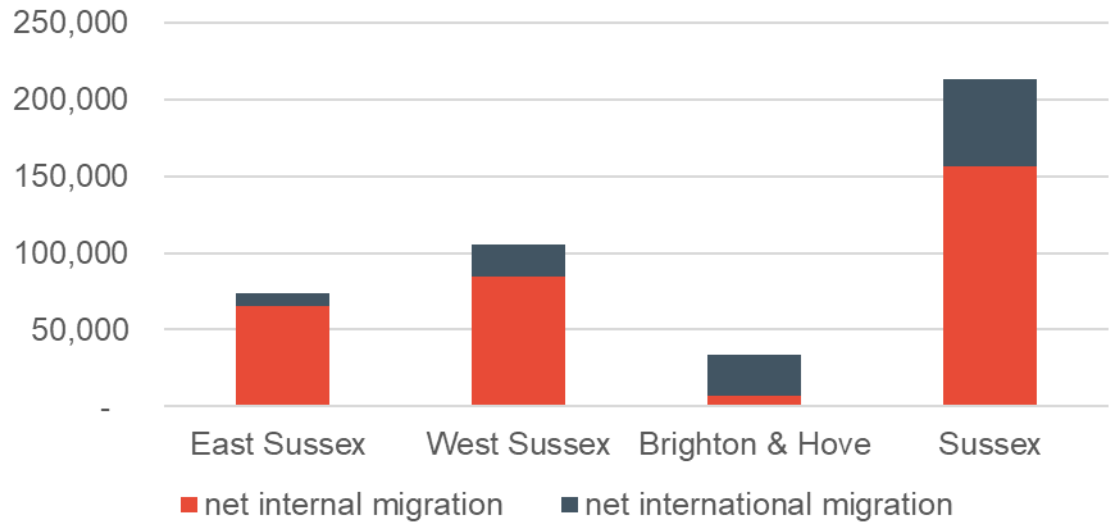
Source: ONS (2021b). Please Note: Figures are rounded to the nearest 1,000.

1.3.20 Overall, around 22 percent of the total population in Sussex is aged 65 and over (23 percent in West Sussex, 26 percent in East Sussex and 13 percent in Brighton & Hove). This is higher than the national average (of 19 percent) in 2020.

1.3.21 From 2010 to 2020 Sussex has experienced high levels of net in-migration, with additional 213,000 migrants moving to the area over this period. This is significantly higher than the overall population growth over the same period (+122,000), which suggests natural change (births minus deaths) was negative. Roughly a quarter (56,500) of Sussex's net additional migrants are international migrants and three quarters are UK migrants (156,500).

1.3.22 Brighton & Hove attracted almost half of the additional net international migrants (26,500) to Sussex, whilst seeing relatively lower migration from other parts of the UK than the rest of Sussex. In contrast, the vast majority of East Sussex's and West Sussex's in-migrants were from other parts of the UK.

Figure 1-3 Changes in net migration in Sussex 2010 to 2020



Source: ONS, (2020).

Future population change

1.3.23 In March 2020, the ONS released updated population projections for local authorities in England over the next 25-years (up to 2043). These show that Sussex's population is forecast to increase by a little over 194,000 people (or +11 percent) over a 25-year period, compared with a projected increase of +10 percent nationally. Within Sussex, the total population is anticipated to increase by 13 percent in West Sussex, 10 percent in East Sussex and 7 percent in Brighton & Hove.

1.3.24 However, the population structure in Sussex is expected to change substantially over the period to 2043. Overall, the working age population is projected to increase by a further 20,000 people (or +2 percent). Nationally the increase is anticipated to be higher (at +4 percent). Within Sussex, Brighton & Hove and West Sussex are projected to experience a +3 percent increase in the core working age population, whilst East Sussex is project to experience a slight decline in the population aged 16-64 (-1 percent).

1.3.25 The population projections are based on past demographic trends and do not account for future economic prospects.

Table 1-6 Population Projections, Change in Population, 2018 to 2043

Area	Aged 0-15		Aged 16-64		Aged 65+		Total Population	
	No.	Percent	No.	Percent	No.	Percent	No.	Percent
West Sussex	-1,722	-1	17,433	3	99,380	51	115,084	13
East Sussex	-5,000	-5	-3,698	-1	66,845	47	58,109	10
Brighton & Hove	-1,492	-3	6,014	3	16,758	44	21,276	7
Sussex	-8,256	-3	19,749	2	182,983	49	194,469	11
England (000s) *	-98	-1	1,317	4	4,548	45	5,767	10

Source: ONS, . Please note: The 2018-based Sub-national Population Projections are not available for the UK or GB, therefore figures for England are presented as a national comparator.

Labour Market Indicators

1.3.26 Sussex outperforms many of the national comparators on a number of key labour market indicators. Sussex's economic activity rate (of 82 percent) is higher than the UK average (of 78 percent), as is its employment rate (79 percent) when

compared with the national average (75 percent). Furthermore, the proportion of core working age residents who are economically inactive is below the national average (of 18 percent *vs* 22 percent nationally). Overall, West Sussex, East Sussex and Brighton & Hove show similar labour market performance, with little variation from the Sussex average across the three indicators mentioned above (see **Table 1-7**).

Table 1-7 Labour market performance, July 2021 to June 2022

Area	Economically Active		In Employment		Economically Inactive	
	Number (000s)	Percent Aged 16 to 64	Number (000s)	Percent Aged 16 to 64	Number (000s)	Percent Aged 16 to 64
West Sussex	418	83	406	80	507	18
East Sussex	255	80	244	76	66	21
Brighton & Hove	172	83	172	80	34	17
Sussex	845	82	845	79	189	18
UK	32487	78	32487	75	8955	22

Source: ONS, (2022a).

1.3.27 The average unemployment rate in Sussex (3.4 percent) is lower than the average for the UK as a whole (3.9 percent). There is a small degree of variation across the county areas within Sussex (1 percentage point difference between West Sussex and East Sussex).

Table 1-8 Number of Unemployed Residents, Sussex, July 2020 – Jun 2021

Area	Unemployment (aged 16 to 64) (000s)	Unemployment rate (percent of population aged 16 to 64)
West Sussex	12	3.0%
East Sussex	10	4.0%
Brighton & Hove	6	3.7%
Sussex	29	3.4%
UK	1257	3.9%

Source: ONS, (2022a)

Earnings

1.3.28 Data on (gross) median annual earnings for full-time employees shows that earnings in Sussex vary around the national average depending on the area of Sussex and whether workplace-based earnings or resident-based earnings are used to measure earnings.

1.3.29 West Sussex and East Sussex have lower average workplace-based earnings than the national average (£30,400 and £27,000 respectively vs £31,400 nationally). Whereas Brighton & Hove (£32,000) is 2 percent above the national average. This reflects Brighton & Hove's role as the main economic centre in the region.

1.3.30 Average resident-based earnings are higher than workplace-based earnings across Sussex, reflecting the fact that many residents commute out of the area to higher value jobs (eg in London). West Sussex and Brighton & Hove's resident-based earnings are higher than the national average (£32,800 and £31,500 respectively vs £31,400 nationally) whereas East Sussex lags the national average (£30,900).

Table 1.9 Resident and workplace median earnings for full-time employees (gross annual), Sussex 2021

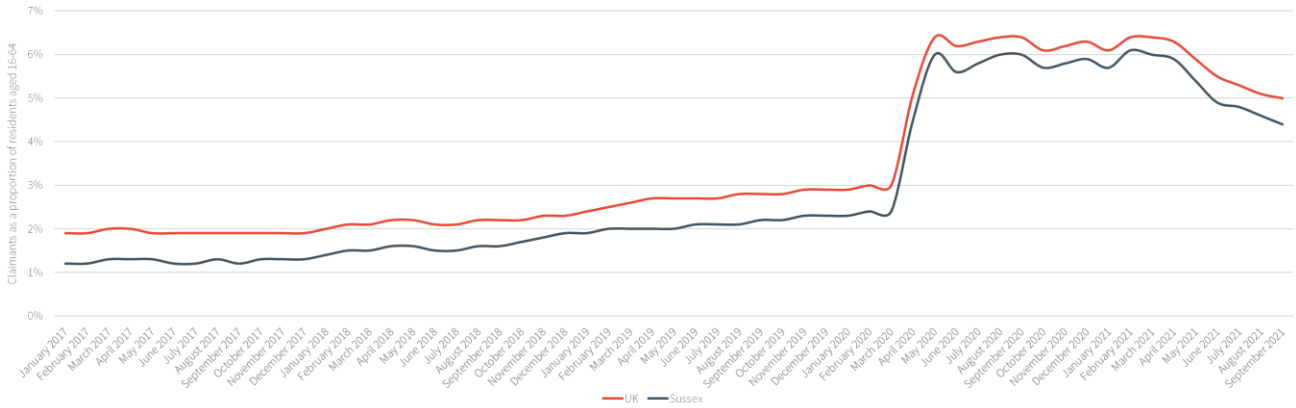
Area	Residence-based earnings (£ per annum)	Workplace-based earnings (£ per annum)
West Sussex	£31,500	£30,400
East Sussex	£30,900	£27,000
Brighton & Hove	£32,800	£32,000
Sussex*	n/a	n/a
UK	£31,400	£31,400

Source: ONS (2021a) . *Please note: There is no equivalent data available at the Sussex level, however it can be assumed that the Sussex average lies between the upper and lower averages for West Sussex, East Sussex and Brighton & Hove.

Claimant Rate

1.3.31 The claimant rate measures the number of people claiming Jobseekers Allowance or Universal Credit who are unemployed and seeking work as a percentage of the working age population. **Figure 1-4** shows this rate in Sussex was below 2.5% for much of the late 2010s, and consistently lower than the UK average, indicating a tight labour market with limited capacity. This increased sharply in 2020 as a result of the Covid pandemic reaching 6% in May 2020. Although the claimant rate has fallen since then, it is still well above its long term average (3.2%).

Figure 1-4 Claimant Count Rate, January 2017 to September 2022

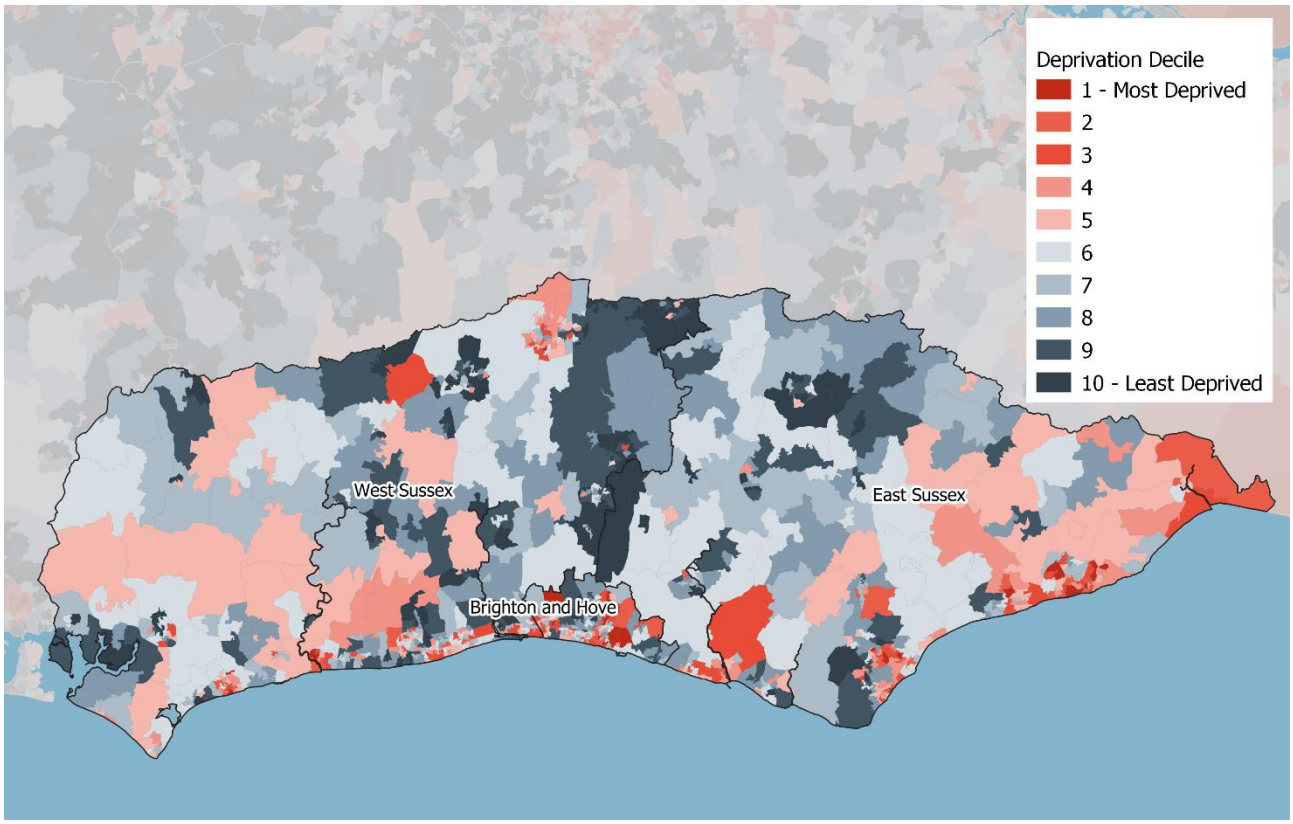


Source: ONS, (2022d), Claimant Count, 2013 to 2022.

Deprivation

1.3.32 The Index of Multiple Deprivation (IMD) is the official measure of relative deprivation in England. It combines information from across seven domains (incl. income, employment, education, skills and training, health and disability, crime, barriers to housing and services, and living environment) to produce an overall relative measure of deprivation. **Figure 1-5** shows that there are some areas in Sussex displaying some of the highest levels of deprivation seen nationally, particularly in urban areas along the Sussex coast, this is most pronounced along the eastern coast of East Sussex (within and surrounding Hastings).

Figure 1-5 Map of Deprivation by Decile, 2019



Source: ONS (2019).

1.3.33 Although the average incidence of these areas is lower than in England, there are pockets within Sussex which have relatively higher levels of deprivation than the national average. At local authority level, Hastings stands out for having the highest levels of deprivation; 16 (30 percent) of the district's lower layer super output areas (LSOA) are in the 10 percent most deprived nationally[2].

Table 1-10 Neighbourhoods in the Highest Decile of Deprivation, 2019

Area	LSOAs in 10 percent most deprived nationally	Proportion of all LSOAs within area (percent)
West Sussex	5	1
East Sussex	22	7
Brighton & Hove	15	9
Sussex	42	4
England*	3,284	10

Source: ONS (2019). *Please Note: IMD data is only available for England, not UK or GB level.

1.3.34 Employment domain data almost identically mirrors the IMD data for the number of LSOAs in the most deprived 10 percent of LSOAs nationally.

Table 1-11 Employment Domain of Deprivation, 2019

Area	LSOAs in 10 percent most deprived nationally	Proportion of all LSOAs within area (precent)
West Sussex	5	1
East Sussex	23	7
Brighton & Hove	15	9
Sussex	43	4
England*	3,284	10

Source: ONS (2019). *Please Note: IMD data is only available for England, not UK or GB level.

[2] Lower Super Output Areas (LSOAs) are geographical areas used for the purpose of local (eg neighbourhood level) socio-economic analysis. LSOAs have an average population of 1500 people or 650 households

Tourism economy

Overview

1.3.35 This section provides an overview of the tourism economy across Sussex. The study area attracts a large number of visitors to its many attractions and AONBs. Tourism makes an important contribution to the economy of Sussex.

Tourism in Sussex

1.3.36 Tourism (as defined by the United Nations World Tourism Organisation (UNWTO, 2019)) is estimated to support 69,500 FTE jobs across Sussex (12 percent of total FTE jobs). Of these, 38,500 jobs are located in West Sussex, 16,500 are in East Sussex and 16,000 FTE jobs are in Brighton & Hove. The tourism sector supports 12 percent of all jobs locally, which is higher than the national average (9%).

Table 1-12 Tourism FTE Employment, 2021

	Full Time Jobs (000s)	Part Time jobs (000s)	FTEs (000s)	Percent of total FTEs	LQ vs GB
West Sussex	27	23	39	12%	1.4
East Sussex	10	13	17	11%	1.2
Brighton & Hove	11	10	16	14%	1.5
Sussex	47	45	70	12%	1.3
Great Britain	1,477	1,652	2,303	9%	1.0

Source: Source: ONS, (2022c). Numbers are rounded to the nearest 500.

1.3.37 From 2015 up to 2019 the number of FTE tourism jobs within Sussex grew steadily. However, 2020 saw a decline in tourism across many areas of the country due to the Covid pandemic. Although this has recovered slightly since 2020, Sussex has seen a decline of 7% from 2016 to 2021, significantly more than the national average (-1%). Brighton and Hove saw the greatest increase in tourism employment over this period (3%) whereas tourism employment in West Sussex and East Sussex fell by 7% and 6% respectively.

Table 1-13 Tourism FTE Employment (000s), 2016-21

	2016	2017	2018	2019	2020	2021	% Change 2016-2021
West Sussex	42	41	42	44	41	39	-7%
East Sussex	18	18	18	18	17	17	-6%
Brighton & Hove	16	15	17	16	17	16	3%
Sussex	75	72	76	78	73	70	-7%
Great Britain	2,324	2,303	2,358	2,419	2,213	2,303	-1%

Source: ONS (2022c). Numbers are rounded to the nearest 500.

Tourism economy in Sussex

1.3.38 Tourism South East produce tourism economic impact assessments for local district areas and in 2021 East Sussex County Council published a Sussex wide baseline assessment of tourism volume and value. However, this does not provide as much detail as the district level assessment of areas and lacks detailed time series data. Only Brighton & Hove City and Hastings Districts have conducted detailed tourism economic impact assessment that are published and available online (both published in 2019). As the central location for tourism within Sussex, Brighton & Hove attracted 10.7 million day and 1.7 million overnight visitors in 2019. This generated an overall contribution of £1,303 million[3] to the economy and supported (directly and indirectly) 17,700 jobs. In comparison the smaller town of Hastings attracted 3.8 million day and 0.5 million overnight visitors. This generated a GVA of £358 million to the economy and supported (directly and indirectly) 7,030 jobs.

1.3.39 The majority of Sussex visitors are from surrounding counties, althoughthere is some evidence that Brighton is reaching markets further away.

1.3.40 Around 62 million tourism visits are made to Sussex annually, generating over £5 billion for the local economy and supporting 74,000 full-time equivalent jobs. This level of economic impact is equivalent to around ten times that of the Isle of Wight, close to two thirds that of Wales, and a third that of Scotland

1.3.41 The staying visitor market (UK + overseas) accounts for 11% of all trips and 50% of visitor spend.

[3] Note this is turnover based and should not be considered the same as GVA.

1.3.42 In 2019 there were 25.5 million visits to East Sussex. The economic impact of tourism in East Sussex was reported to be £1,186 million. Eastbourne accounts for 28 percent of this impact, Hastings 21 percent, Rother 19 percent, Wealden 19 percent and Lewes 12 percent. Whilst in West Sussex there were 24.6 million visits in 2019. The economic impact of tourism in West Sussex in 2019 was reported to be £2,035 million. Chichester accounts for 24 percent of this impact, Crawley 16 percent, Adur & Worthing 15 percent, Mid Sussex 14 percent and Horsham 12 percent (East Sussex County Council, 2021).

Table 1-14 Economic impact of tourism on Sussex, 2019

	Brighton & Hove	Hastings	East Sussex	West Sussex	Sussex
Volume of Day Trips (m)	10.7	3.8	22.8	21.9	55.4
Value of Day Trips (£millions)	£400	£146	n/a	n/a	£1,949
Volume of Overnight Trips (m)	1.7	0.5	2.7	2.7	7.0
Number of Nights (m)	5.2	2.4	n/a	n/a	27.5
Average Nights per Trip	3.1	4.7	n/a	n/a	3.9
Value of Overnight Trips (£millions)	£540.5	142.3	n/a	n/a	£1,927
Value of all trips (£millions)*	£1,303	£358	£1,860	£2,035	£5,198
Jobs (FTEs)*	17,700	7,030	28,399	27,910	74,009

Source: Tourism South East, (2019a, 2019b,) and East Sussex County Council (2021). Please note that n/a is used where there is a lack of available data.

1.3.43 Overall, there was a slight increase in day visits to Brighton & Hove, from 10 million in 2014 to 10.7 million in 2019, although the number of day visits dropped to below 10 million per annum between 2015 and2018 (which coincides with the

construction period of Rampion 1 – note that there is no evidence to suggest causality between these figures and offshore wind development). Visitor expenditure was also higher in 2019 especially when compared with 2014. In total, it is estimated that day visitors spent in the region of £400 million within the Brighton & Hove economy in 2019.

1.3.44 Overnight tourism showed a small amount of growth from 2014 to 2019, growing from 1.4 million overnight visitors, who spent £518 million to 1.6 million overnight visitors contributing £567 million to the local economy.

1.3.45 2020 data shows a decline in visitor volume (falling to 8.3 million visits and 0.6 overnight visits) and value (falling to £144 million in day visitor expenditure and £227 million on overnight visitor expenditure) for both day visits and overnight tourism due to the impact of Covid-19 restrictions.

Table 1-15 Change Tourism Economy in Brighton & Hove, 2014 to 2019

	Day Visits		Overnight Tourism	
	Visits (million)	**Expenditure (£millions)**	**Visits (millions)**	**Expenditure (£millions)**
2014	10.0	£355	1.4	£518
2015	9.1	£332	1.5	£526
2016	9.6	£353	1.6	£533
2017	9.4	£335	1.5	£514
2018	9.5	£349	1.5	£515
2019	10.7	£400	1.6	£567
2020	8.3	£144	0.6	£227

Source: Tourism South East, (2020, 2019a, 2018, 2017, 2016, 2015, 2014).

Visit Brighton visitor survey insights

1.3.46 Visit Brighton (Tourism South East, 2018a) have conducted a number of visitor surveys, the latest survey was conducted in 2018. These surveys provide useful insights for the assessment of the tourism baseline.

1.3.47 The highest proportion of visitor survey respondents indicated that the main purpose of their visit to Brighton & Hove was for 'leisure/ holiday' purposes (79 percent). Twelve percent were in Brighton & Hove primarily for the purpose of visiting friends or relatives. 2 percent were language students, 3 percent were on a special shopping trip and 1 percent were visiting for business purposes.

1.3.48 Thirty percent of staying visitors were on a short break of 2 to 3 nights, 19 percent for 1 night, 30 percent for 4 to 7 nights, 12 percent for 8-14 nights and 9 percent

for more than 14 nights. Of the visitor groups staying overnight in Brighton & Hove, 64 percent were using serviced accommodation.

1.3.49 When asked what the main trigger had been for initiating their visit to Brighton & Hover, 26 percent said it was to visit the sea/beach and 18 percent said it had been to visit friends and/or relatives. Eleven percent had visited previously, 11 percent just wanted a day out and 7 percent had been triggered by the good summer weather.

1.3.50 The most popular activity undertaken by visitors was just walking around (81 percent), followed by going out for something to eat (76 percent), visiting the beach/seafront (75 percent), shopping (51 percent) and visiting a tourist attraction (46 percent). The main attractions visited were the pier (59 percent), the Royal Pavilion (29 percent) and the British Airways i360 (23 percent).

1.3.51 The average overall spend on eating out, shopping, entertainment and travel/transport among visitors staying overnight in Brighton & Hove in 2018 was £71.65 (per person per 24 hours). Expenditure on commercial accommodation was £105.47 (£94.94 in 2016). When added together the average total spend for staying visitors, was estimated to be £177.12 per person per night.

1.3.52 Day visitors on holiday visiting Brighton & Hove spent an average of £96.63 per person per day during 2018. Eating out accounted for the highest proportion of their spend. Day visitors from home to Brighton & Hove spent an average of £45.46 per person per day during 2018.

Nature of Tourism Offer in Sussex

1.3.53 Sussex is home to several attractions attracting over 100,000 visits per year. The most popular of these is Brighton Pier which consistently brings in between 4 and 5 million visitors per year. In 2019 Brighton Pier hosted 4.9 million visitors and has seen increasing levels of visitor numbers from 2012 to 2019. According to Visit England data, the pier is the most visited attraction in England.

1.3.54 With the exception of Wakehurst, visitor numbers declined at all Sussex's main visitor attractions between 2019 and 2020[4] . This reflects the impact of COVID-19 restrictions. The data also shows that there was a reasonably strong bounce back in 2021 as pandemic restrictions were eased with all but one major visitor attraction in Sussex (for which data is available) seeing an increase in visitor numbers compared to 2020. However, it should be noted that visitor numbers did not return to 2019 levels.

[4] Based on all visitor attractions with over 100,000 visits per annum where data is available

Table 1-16 Visitor Attractions in Sussex which attracted over 100,000 visitors pre Covid-19 (in 2019) and additional visitor data during periods of Covid-19 restrictions in 2020 and 2021.

Attraction	No. of Visitors (2019)	No. of Visitors (2020)	No. of Visitors (2021)	District
Brighton Pier	4,901,221	4,110,005	4,260,485	Brighton & Hove
Nymans	382,948	243,364	307,085	Mid Sussex
Wakehurst	312,813	342,545	296,195	Mid Sussex
Royal Pavilion	301,675	56,298	73,159	Brighton & Hove
Chichester Cathedral	334,351	196,070	151,250	Chichester
Sheffield Park Garden	295,384	255,868	296,195	Wealden
Petworth House & Park	186,316	107,037	127,458	Chichester
Fishers Adventure Farm Park	176,932	106,168	n/a	Horsham
Southwater Country Park	170,000	n/a	n/a	Horsham
Standen	166,337	98,084	113,139	Mid Sussex
Bodiam Castle	165,785	72,847	123,604	Rother
Tulleys Farm	140,000	60,000	n/a	Crawley
Batemans	124,788	54,007	83,431	Rother
Horsham Museum & Art Gallery & Visitor Information Centre	109,255	n/a	n/a	Horsham

Source: Visit England, (2020, 2021 and 2022).

1.3.55 The Sussex tourism baseline notes that visitor markets across Sussex are broadly similar (mature empty nesters), except in Brighton where they are generally younger. Families are not a significant market for Sussex except in one or two specific areas. Much of what Sussex has to offer is thematically indistinct from

other competing destinations (heritage towns and attractions, coast, countryside, gardens, events & festivals and activities).

1.3.56 The coast of Sussex forms the heart of the tourism sector and is the most at risk of any potential impacts resulting from offshore wind development. The table below sets out several key locations for coastal tourism and the nature of the tourism offer at these locations. This is based on desk based research due to the lack of visitor surveys for most of these areas.

Table 1-17 Nature of tourism offer at key coastal tourism locations

Location	Nature of tourism offer
Worthing	This is a popular seaside destination with good retail, entertainment and leisure facilities. There are notable historic buildings, as well as nearby pre-historic sites, and it provides visitors with a base from which to explore the South Downs. Tourism is an important industry for the town and Worthing, together with Adur saw 4.76 million tourism visits in 2019. Worthing has 5 miles of promenade, including Splash Point and Lido which attracts families for seaside activities. Worthing's seafront is based around its Historic Arc Deco Pier, which was opened in 1862 and remains open. In 2019, Worthing Pier was named the best in Britain. Other attractions include: • Worthing observation wheel; • Worthing Museum & Art Gallery; • walks along the beach; • cycling; • High Salvington Windmill; • museums; • Bramber Castle; • gardens; • parks; and • the Cissbury Ring. Worthing has a partly sandy, mostly gravel, and pebbles beach (Worthing Beach).
Littlehampton and Climping	Littlehampton is home to sandy beaches, a bustling marina and harbour and contemporary architecture. The seaside town's attractions includes the East Bench Café and the UK's longest picnic bench, as well as West Beach Local Nature reserve – a site of Special Scientific interest. The River Arun hosts a number of activities including sailing, diving and fishing. In addition to this, Littlehampton has an amusement park, miniature railway making the destination popular to families and couples. Climping lies 3 miles west of Littlehampton and predominately attracts families. The area is well known for its quiet beach.

Location	Nature of tourism offer
	Along the coast towards the River Arun and Littlehampton are the Climping sand dunes, a Site of Special Scientific Interest.
Brighton and Hove	Brighton and Hove attract a range of tourists including families, teens and adults due to the wide variety of attractions. According to a survey conducted by Visit Bright, 79% of tourists visit the area for leisure/ holiday purposes. The most popular activities undertaken by visitors included walking (81%), going out to eat (76%), visiting the beach/seafront (75%), shopping (51%) and visiting tourist attractions (46%). 60% of overnight staying visitors go for a short break of 2 to 7 nights with 12% staying for 8-14 days. When survey respondents were asked what the main reason for their visit to Brighton & Hove was, 26% said the sea/beach, 18% states it had been to visit friends and/ or relatives and 11% were returned after a previous trip. The main attractions visited were the pier (59%), they Royal Pavilion (29%) and the British Airways I360 (23%). Other popular attractions include: • the Viewing Tower; • Sea Life Brighton; and • Brighton Fishing Museum. Brighton has a vibrant city centre, day and evening, plus a good rail service from London and road network, making Brighton an easy day trip out of the capital. Day visitors tend to come at weekends, in the summer months and for big festivals and events. There is a vibrant arts scene enjoyed by local people and tourists and a local focus on sustainable tourism in Brighton encourages more visitors to the area.
Bognor Regis / Middleton on Sea	Bognor Regis is attractive to families looking for a day out, a seaside holiday or short break. The beaches are particularly attractive having received the European Blue Flag and the Seaside Award for being clean, safe and with good facilities[5]. Bognor Regis provides a range of attractions including: • the Land Train - offering rides up and down the promenade; • Bognor Regis Museum - contains information and pictures of the history of the seaside town; • the pier; • parks;

[5] Bognor Regis Town Council Visitor Information - Bognor Regis Town Council

Location	Nature of tourism offer
	• the South Downs planetarium; • the Picturedrome cinema; • Seafront crazy golf; and • Fly Fortress Theme Park[6]. The Bognor Regis Pier first opened in 1865 and is one of the oldest piers in Britain. The pier hosts one of the biggest and busiest nightclubs in West Sussex along with an amusements arcade and sea views of Bognor Regis beach. The village of Middleton-on-Sea is located along the coast to the east of Bognor Regis. The small village is frequented by families and has a varied offer for children and adults. The village has a main through road with shops on either side and is a great place for walking due to the footpaths and firm sandy beach. The quiet and tranquil beach is one of the sunniest spots in the UK and hosts a wide range of water activities. Tourists can walk along the promenade from Bognor Regis to Felpham. Additional attractions include: • The promenade allows for walks from Bognor Regis to Felpham; • Parks; • Gardens; • Museums; • Castle; and • Cathedrals.

Tourism assets within a 500m buffer of the onshore proposed DCO Order Limits

1.3.57 The landfall, onshore cable corridor and onshore substation will potentially impact tourism assets located close to the onshore cable corridor. **Table 1-18** below highlights tourism assets within 500m of the onshore cable corridor which have been identified in a desk based assessment. This includes businesses that are highly intertwined with the tourism economy such as visitor attractions, caravan parks, hotels, pubs and cafes. Due to the cable corridor being in a mainly rural setting the visitor offer in this area is reflective of the character and setting of the area. Overall, the following types and number of assets have been identified:

- 1 beach;
- 5 cafes and pubs;
- 8 caravan parks / campsites;

[6] Bognor Regis Beach

- 11 other visitor accommodation (villas/apartments); and
- 3 other assets including venues for workshops, a wedding venue and an equestrian venue.

Table 1-18 Tourism economy assets within 500m of proposed onshore DCO order limits

Asset	Description / type	Distance from onshore proposed DCO Order Limits	Section of onshorecable corridor and District
Climping beach and car park	Beach		Landfall to SDNP (Hammerpot)
Climping Beach Café	Café / pub		
The cheese making workshop	Other		
Brookside caravan park	Caravan / campsite		
Cuckoo Camp	Caravan / campsite		
Ionian Villas	Other visitor accommodation		
Lyminster Nusery Caravans	Caravan / campsite		
2 radar cottages	Other visitor accommodation		
Amanda Hopkinson Wedding Day	Other		
Decoy Punds / Lets retreat	Other		
Norfolk House	Other visitor accommodation		
Holt House	Other visitor accommodation		SDNP (Hammerpot to South of Wiston)
The Frankland Arms	Café / pub		

Asset	Description / type	Distance from onshore proposed DCO Order Limits	Section of onshorecable corridor and District
Washington Caravan & Camping Park	Caravan / campsite		
In her Hands Workshop	Other		SDNP to onshore substation
Artisan bakehouse	Other		
The Old Carhouse	Other		
New Wharf Campsite	Caravan / campsite		
Fountain Ashurst	Other		
Withywood Shepherds Hut	Other visitor accomodation		
Withyfield Cottage	Other visitor accommodation		
Hush Glider Camp	Caravan / campsite		
Homelands Equestrian	Other		
Partridge Coffee Stop	Café / pub		
Bines farm cottage	Other visitor accomodation		
Fairoaks Farm Campsite	Caravan / campsite		
Royal Oak	Café / pub		Onshore substation
North Cottage Country Retreat	Other visitor accommodation		

1.3.58 A large section of the onshore cable will be located in the SDNP. The SDNP is home to a number of long standing tourist destinations, however, comparatively, the National Park is still very young, having only been designated in 2010. Four tourism assets identified in **Appendix 17.3: Socio-economics technical baseline, Volume 4** of the ES (Document Reference: 6.4.17.3) are located in

SDPN and within 500m of the onshore cable, none of which are major tourism attractions. These assets are Norfolk House, holt House, The Frankland Arms and Washington Caravan & Camping Park.

1.3.59 SDNPA conducted a visitor survey in 2019 (SDNPA, 2019). 1,193 10-minute face to face interviews were completed with visitors at 16 sites across the national park between July and September 2018. Key findings relevant to the baseline assessment of tourism conditions include:

- Eight in ten respondents (82%) noted that they were aware of being inside the South Downs National Park;
- 28% indicated that the National Park had been a factor in their decision to visit the area. Although this rose to 60% for Overnight visitors staying in the park;
- The overall average length of stay of overnight visitors has dropped from 5.28 nights in 2015 to 4.66 in 2018;
- Median expenditure on non-accommodation costs remained static at £6.67. Although increased maximum expenditure meant the mean rose to £12.31 from £9.97;
- 39% of respondents were day visitors, 35% of survey respondents were local residents, 20% were overnight visitors staying outside the SDNP and 6% were overnight visitors staying within the SDNP;
- Of the respondents who were aware of the designation (866 people), only 28% indicated that the National Park had been a factor in their decision to visit the area. It is noted that the development of the SDNP as an experiential tourism destination in its own right through initiatives such as the English National Park Collection with Visit England will likely lead to a positive movement in this indicator.;
- Of the 1,193 respondents, 75% were repeat visitors. Local residents visit the most regularly with 43% of respondents visiting either once a week or more than once a week;
- 81% of the 73 overnight visitors staying within the National Park stayed in paid accommodation;
- Scenic landscape &/or breath-taking views was the factor most likely to contribute to enjoyment, with over three quarters of respondents (77%) choosing this option. Nature/wildlife saw 57% of respondents choose this as a factor whilst tranquil/unspoilt places saw 52% choose this as a factor;
- Traffic issues were a key issue for 13 visitors to Alfriston where improvements would have made the day more enjoyable;
- The most popular activities undertaken were going for a walk (73% of respondents undertook this activity) and visiting a café/pub/tea room (50% of respondents undertook this activity);
- The main mode of transport for visitors was private car/van/other motor vehicle with almost 80% using this method;

- Visitors over the age of 45 made up 55% of visitors this had grown from 45% in 2015; and
- Overseas visitors made up almost 10% of the respondents to the survey.

Onshore recreation

Overview

1.3.60 This section presents an overview of the key onshore recreation assets within the Sussex study area. It provides a baseline for the socio-economic impact assessment the construction, operation and decommissioning activities related to Rampion 2 is likely to have on recreation activities, including:

- shore-based wind surfing and kite surfing activity;
- non-bathing activities on Climping beach;
- Public rights of Way (PRoW), including the England Coast Path, Monarch's Way, South Downs Way National Trail (SDW) and Downs Link;
- cycle routes National Cycle Network 2 and regional route 223 (Downs Link);
- Rivers Arun and Adur;
- Access Land, including common land; and
- Village Green.

Wind surfing and kite surfing

1.3.61 There is a strong surfing community along the Sussex coast. The bathing waters within the study area are attractive for many water sports. Areas which attract surfers include:

- Littlehampton – the beach is reasonably exposed which leads to good surfing conditions.
- Brighton – Surfing is an important part of the Brighton culture and the area has a large surfing community. Surfing is popular around the Marina, at the Wedge and at the West Pier.
- Eastbourne – Eastbourne has good facilities for a variety of water sports and good conditions for surfing.
- West Wittering – A quieter spot for surfing with good surfing conditions.

1.3.62 Active Sussex lists the following Surfing clubs on their website:

- Brighton Surf Lifesaving Club;
- Shore Surf Club East Wittering; and
- X-Train, West Wittering.

1.3.63 Surfing can only occur during suitable weather conditions which allow for surf and swell with the best time of the year being autumn – winter but with frequency of activity often occurring summer to autumn.

1.3.64 Windsurfing is also a popular water sport activity in Sussex with a number of designated clubs and schools located on the coast. Popular locations for windsurfing and kitesurfing include Camber and Chichester which are home to the Kitesurf centre in Camber and Chichester Watersports. Brighton is also a popular area for windsurfing and kite surfing.

1.3.65 Other water based powered craft for use in water sports are known to occur within the Sussex area including speedboating and water-skiing. These activities tend to occur mainly in Spring and Autumn. Water based crafts for use of water sports can be launched from a number of facilities along the Sussex coast.

1.3.66 One kite surfing school regularly uses the inshore waters at Climping beach, based near to the car park at Atherington. Other schools use the location on an occasional basis. Numbers of kite/wind surfers is generally five to 20 and can be on any day according to prevailing conditions. (*Pers. comm. C. Miles 2020*).

Climping Beach

1.3.67 The beach has a large, privately run car park, toilets and a café. It is relatively busy on normal warm or sunny days, particularly during school and bank holidays, however, online descriptions state that the beach is quieter than other local beaches.

1.3.68 The beach is not pristine. The sea defences have suffered significant storm damage and there is evidence of heavy vehicles using the track behind the beach.

1.3.69 The Strava Heatmap for water-based activities shows that the sea at Climping Beach is relatively less popular compared to other nearby coastal stretches and suggest that the parking charges reduce visitor numbers.

Public rights of way and promoted routes

1.3.70 The landfall, cable corridor and substation will potentially impact up to 154 PRoW, as recorded on the WSCC Interactive Map (WSCC, 2012), and falling within a 500 metre (m) buffer each side of the onshore corridor. All of the paths surveyed were open and in acceptable condition. The paths were all assessed for relative levels of use using Strava Global Heatmap traces and Google Earth imagery. The results have been fully tabulated in **Annex A**.

1.3.71 A smaller number of paths in the corridor appear to be frequently or heavily used, or have attributes that otherwise result in them being of medium, high or very high sensitivity, these are listed, in **Table 1-19** below:

Table 1-19 Key PRoW within the onshore cable corridor

Parish	Path No.	Type	Sensitivity of PRoW	Notes
Climping	829	Footpath	High	Part of planned England Coast Path is subject to an unresolved application to upgrade it to a Restricted Byway.
Climping	197	Byway open to all traffic	Medium	Probable haul road/access route.
Warning Camp	2213	Bridleway	Medium	Within 500m of access route but expect low impact, but part of Monarch's Way.
Warning Camp	3740	Bridleway	Medium	Feeder route to/ from Monarch's Way. Access route for HGV.
Warning Camp	2219	Bridleway	Medium	Part of Monarch's Way. Within 500m of access route. Expect low impact.
Burpham	2221	Bridleway	Medium	Within 500m of access route at its southern end but expect low impact.
Burpham	2214	Bridleway	Medium	Alternative routes available. Terminates at 2211 access route to south but expect low impact.
Burpham & Warning Camp	2212	Bridleway	Medium	Part of Monarch's Way but alternative routes available. Within 500m of access route but expect low impact. Offers alternative route to 3740, though less direct.
Angmering	2260	Bridleway	Medium	Connects to BW2208_1 which is crossed by cable corridor, but will not be directly impacted.

Parish	Path No.	Type	Sensitivity of PRoW	Notes
Angmering	2187_1	Bridleway	Medium	Link to key crossing of A27. Access route at southern end.
Patching	2264	Bridleway	High	Part of Monarch's Way. Crossed by access route on estate road, expect low impact.
Patching	2174_1	Footpath	Medium	Crossed by cable corridor. Alternative route via 2208.
Patching	2186_1	Footpath	Medium	Forms part of well-used north-south route within 500m of corridor. Shielded by woodland so low impact expected.
Patching	2175	Bridleway	High	Part of Monarch's Way. Crossed by cable corridor and partly used as an access route. Woodland route with alternative trails (unofficial) throughout the wood.
Patching	2211	Bridleway	High	Part of Monarch's Way. Will be used as an access route.
Patching	2180_1	Bridleway	Medium	Access route/ Monarch's Way abuts its northern terminus. Low impact expected.
Patching	2185	Footpath	Medium	Within 500m but low impact expected.
Clapham	2091	Bridleway	High	Part of Monarch's Way. Crossed by access route on estate road, expect low impact.
Patching	2208	Bridleway	High	Part of Monarch's Way. Within 500m for several hundred metres but low impact expected. Crossed by cable corridor (not on

Parish	Path No.	Type	Sensitivity of PRoW	Notes
				Monarch's Way) – temporary diversion possible via fp2188_1 & fp2174_1.
Patching	2173	Bridleway	Medium	Crossed by onshore cable corridor and may require local temporary diversion, or diversion onto alternative bridleway. Also used along much of its length as an access route.
Patching	2209	Bridleway	Medium	Within 500m but low impact, although may see an increase in traffic as an alternative to 2173.
Patching	2208_1	Bridleway	Medium	Crossed by cable corridor, also access route from the south.
Storrington and Sullington, & Findon	2092	Restricted byway	Very High	South Downs Way. Critical crossing point near a major junction of paths. Follows ridgeline, so users will see the works even if not directly impacted. The RB continues south from the SDW as an arterial route to Worthing. This section will be an access route for HGV.
Findon	2093	Restricted byway	High	Within 500m of access route. Indirect impact from interruptions to 2092.
Findon	2107	Bridleway	Medium	Short connecting path. Within 500m but expect low impact other than as a result of vehicle traffic on 2092.
Findon	2103	Bridleway	Medium	Short connecting path. Within 500m but expect

Parish	Path No.	Type	Sensitivity of PRoW	Notes
				low impact other than as a result of vehicle traffic on 2092.
Findon	2106	Bridleway	Medium	Within 500m but expect low impact other than as a result of vehicle traffic on 2092.
Findon	2109	Bridleway	Medium	Within 500m but expect low impact other than as a result of vehicle traffic on 2092.
Storrington and Sullington	2693	Restricted bridleway	Very High	Continuation of SDW on ridgeline, so there will be visual intrusion if not directly crossed. Both 2693 and 2092 may be heavily impacted during crossing works.
Washington	2665	Bridleway	Medium	Crossed by onshore cable corridor and may require local temporary diversion, or diversion onto alternative bridleway.
Storrington and Sullington	2665	Bridleway	Medium	Crossed by onshore cable corridor and may require local temporary diversion, or diversion onto alternative bridleway. Will partially be an access route.
Washington	2697	Bridleway	Medium	Could use alternative bridleway/minor road/track access for riders but could require more use of A283. Will require signage well in advance to warn users of any closure.
Washington	2623	Bridleway	Medium	Within 500m but expect low impact - unless the bridleway is promoted as a diversion route. Then

Parish	Path No.	Type	Sensitivity of PRoW	Notes
				can expect some increase in traffic.
Washington	2666	Bridleway	Medium	Within 500m but expect low impact - unless the bridleway is promoted as a diversion route. Then can expect some increase in traffic.
West Grinstead	3514	Bridleway	High	Downs Link. Will need to be crossed. Busy route on railway embankment. Needs HDD to reduce impact.
West Grinstead	2372_2	Bridleway	High	Access route for Downs Link/Sustrans regional route 223. Access will need to be maintained. Also access route to cable corridor.
Cowfold	1730	Bridleway	Medium	Within 500m but low impact expected.

1.3.72 All other paths in the original study area show signs of low or moderate levels of use and were not otherwise considered to be of medium sensitivity or above.

1.3.73 The promoted routes crossed by the cable corridor consist of the England Coast Path, Monarch's Way, the Downs Link and the SDW National Trail.

1.3.74 The England Coast Path along Climping Beach has been approved by the Secretary of State but is not yet formally open. Therefore, its future status as a national trail is unlikely to be having much impact upon current (or pre-COVID) levels of use. Most users of the path are probably beach users or local walkers/ dog-walkers. Once officially opened, it is expected that path use will increase. An indication of the levels that can be expected can tentatively be drawn from data from opened sections of the England Coast Path in southern England.

1.3.75 Data from Natural England (unpublished report, D. Pearce, 2020. pers. comm.) record that the England Coast Path at Pegwell Bay in Kent received about 46,500 visits per annum for 2017 and 2018. This figure is higher than is expected at Climping Beach as Pegwell Bay is closer to large centres of population. However, the seasonal and weekly patterns of use give a guide to the patterns of use that can be expected. At Pegwell Bay it has been found that there is a large seasonal change, with the colder months (for instance, October to March) recording half or less of the visits recorded between April and September. The peak months of July

and August (212 visits/ day and 210 visits/ day respectively) are approximately four times as busy as the quietest months of December and January (of 54 visits/ day). The weekly distribution of visits shows an average of 115.8 counts on weekdays and a weekend average of 172. Therefore, weekend days generally have around 1.5-times the number of visits. Sunday visits are slightly higher than Saturday (176 Sunday, 168 Saturday).

1.3.76 No figures have been found for use of Monarch's Way. The Strava Heatmap suggests that it is generally only moderately trafficked but with some sections more heavily used where these are also important segments in the local network.

1.3.77 The SDW shows up on Strava Heatmap as a heavily trafficked route. The SDNPA maintains several people counters along the route, including one at Kithurst Hill – approximately 1km from the expected cable crossing. Data have been supplied for 1 April 2015 to 31 March 2016, as this is the most recent year for which reliable data is available due to problems with data collection (pers. comm. SDW Officer, 23 November 2020; Principal Planning Officer, SDNPA, 21 February 2023).

1.3.78 The total number of users has been recorded by mode of use; 31,929 walkers, 12,173 cyclists and 179 horse riders. The year-round average daily traffic is 33 cyclists and 87 walkers per day. However, there is a seasonal variation, with July being the busiest month. A total of 5344 walkers used this part of the SDW during July, or approximately 1,200 per week. Of these, on average about 130 used the SDW each weekday, 290 on a Saturday and 257 on a Sunday.

1.3.79 For cyclists on the SDW, visits peaked at 1895 for July 2015, with an average 39 cyclists per weekday, 133 on Saturdays and 109 on Sundays.

1.3.80 January was the quietest month with a combined average of only 56 users per day, compared to a combined average of 224 users per day in July.

1.3.81 Horse riding on this part of the SDW is negligible, with less than 1 percent of traffic being equestrian.

1.3.82 The Downs Link is a 37-mile bridleway route connecting the North Downs Way and SDW National Trails to the coast at Shoreham. The Downs Link is also promoted by Sustrans as its regional route 223.

1.3.83 The cable route will cross the Downs Link between Partridge Green and Henfield. The route shows up on Strava Heatmap as being heavily used. A walkover survey (20 August 2020) showed a high level of use, particularly with groups of young cyclists and families. Walkers were also in abundance. A sole horse rider was seen near to Partridge Green.

1.3.84 Data has been obtained for traffic counters (including walkers, riders, cyclists or private vehicle users) at three locations on the Downs Link at Henfield, West Grinstead and Rudgwick. The initial data set covered the period 9 February 2020 to 8 October 2020. This period was predominantly within that covered by various levels of COVID-19 pandemic restrictions and so the data cannot be taken to be strictly representative of pre-COVID-19 pandemic use rates. Updated data has been supplied covering November 2021 to December 2022. These data show that overall levels of usage have fallen by approximately half since November 2021 but that the general pattern of user traffic by day of the week has remained similar, though with a less pronounced monthly variation.

1.3.85 The total recorded users for the 2020 data period are: Henfield – 171,968; West Grinstead – 80,418; and Rudgwick – 59,441. The data give the weekly and monthly patterns of use shown in **Figure 1-6** and **Figure 1-7** below. The full data are shown in **Annex B**.

Figure 1-6 Average number of users per day of the week

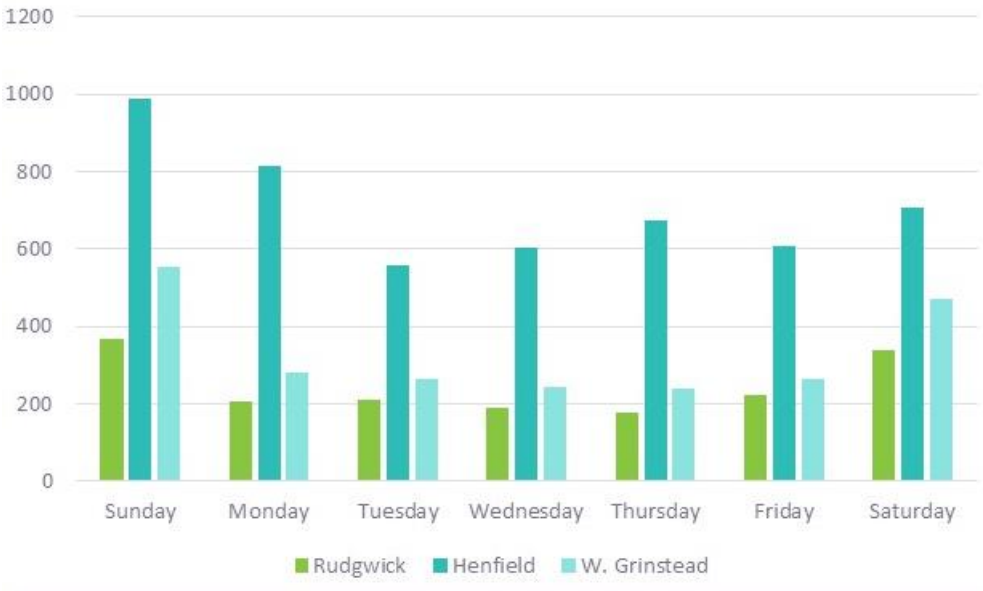
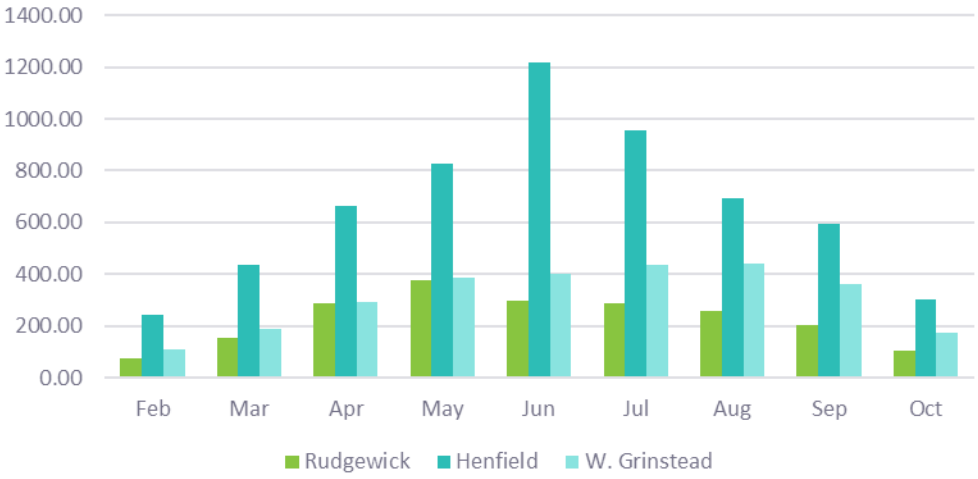


Figure 1-7 Average daily users by month

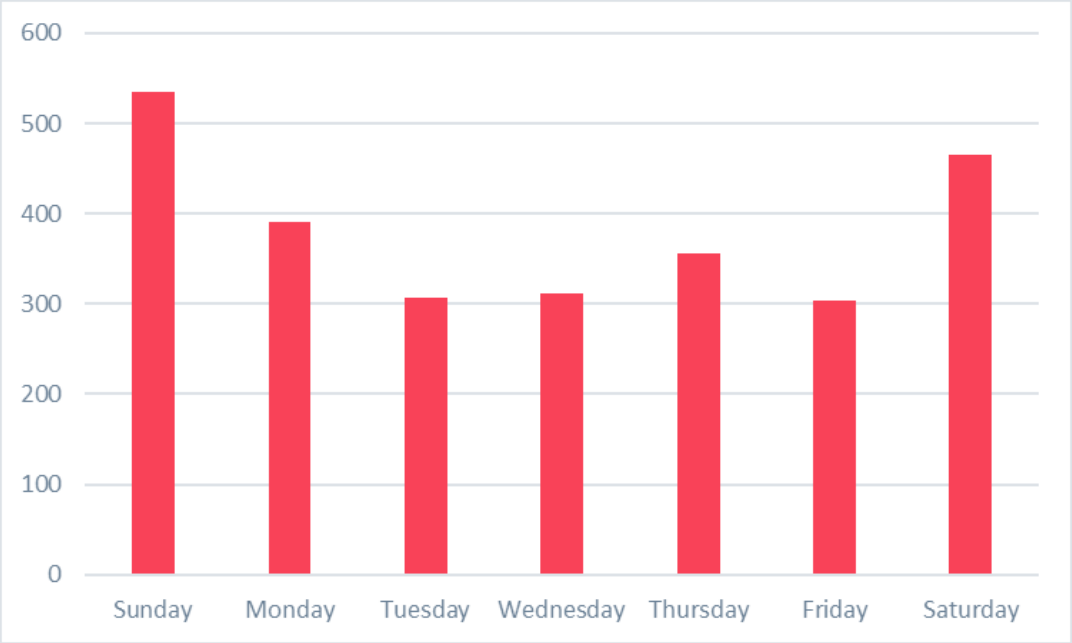


1.3.86 From the data it is apparent that there is a considerable increase in use during the warmer months at all sites but especially as recorded by the Henfield counter. It is also apparent that numbers of users are generally higher on a Sunday, though the mid-week fall in numbers is less notable for Henfield than for the other sites.

1.3.87 Updated data were sought to try to gauge the changes post COVID-19 pandemic lockdowns. The data supplied (pers. comm. Principal Planning Officer, SDNPA, 21 February 2023, see Appendix B) has been plotted in **Figure 1-8** and **Figure 1-9**

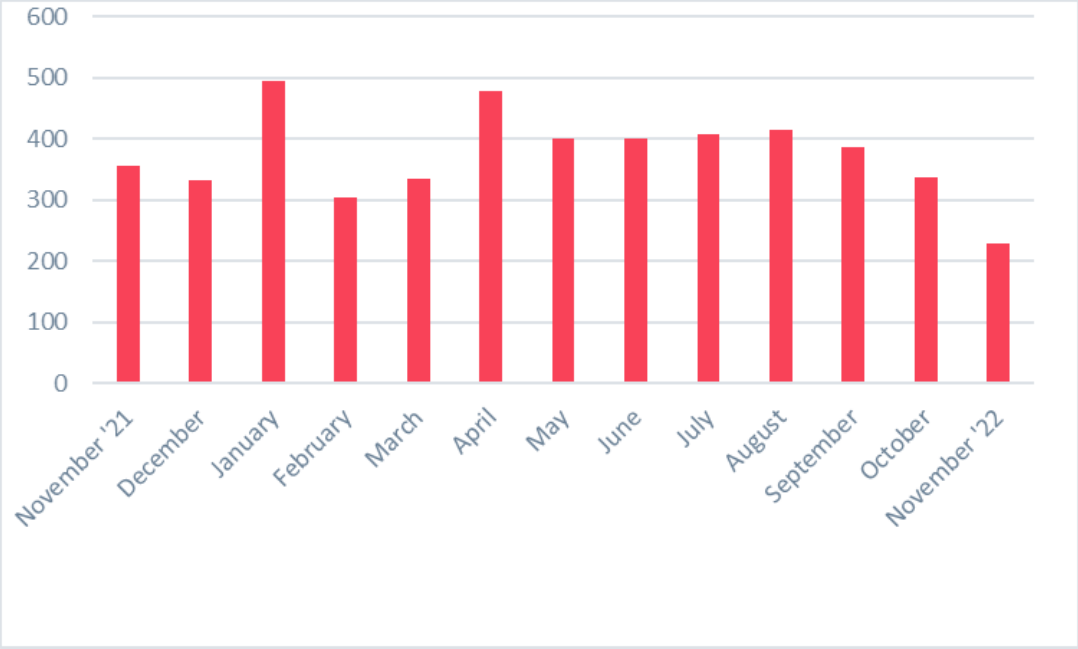
below:Principal Planning Officer, SDNPA, 21 February 2023, see Appendix B) has been plotted in **Figure 1-8** and **Figure 1-9** below:

Figure 1-8 Average number of users per day of the week (2021-2) Henfield only



1.3.88 The daily pattern of use has remained broadly similar post COVID-19 lockdowns.

Figure 1-9 Average daily users by month (2021-22) Henfield only



1.3.89 The average daily user count post COVID-19 pandemic lockdowns is generally lower than during the height of the pandemic, with the summer monthly user counts during 2021-2022 generally being considerably lower. It is also particularly noticeable how the distribution curve for monthly users is much flatter for 2021-

2022 than during 2020. While they probably represent an overstatement of the normal usage, the data for 2020 has been used to represent the potential traffic going forwards.

1.3.90 The Downs Link is on a low embankment, an old railway base, in the area of the expected cable crossing point.

Cycling routes

1.3.91 There are two promoted cycling routes to be crossed: National Cycle Network route 2, and regional route 223. Route 223 runs over the Downs Link, as discussed above.

1.3.92 National Cycle Network route 2 is a long-distance route which, when fully complete, will link Dover to St. Austell. The route will be crossed approximately 1km north of Climping Beach. At this location, National Cycle Network route 2 runs on the minor road known as Ferry Road. No quantitative data is available but Strava Heatmap suggests frequent use by cyclists.

Horse riding

1.3.93 There are no regionally or nationally promoted horse riding routes except for the SDW and the Downs Link. No evidence has been found of significant equestrian traffic on either of these routes. However, the walkover surveys showed some evidence of horse riding on the majority of bridleway and restricted byways visited, in particular north of the A27 across the SDNP, with a local concentration of livery yards, stables and studs near to the cable corridor. It is therefore considered that horse riding is a regular use of most bridleways across the SDNP in the vicinity of the cable corridor.

Rivers Arun & Adur

1.3.94 Both rivers are important recreation assets and both will be crossed by the onshore cable corridor. The River Arun will be crossed about 2km from the coast at Littlehampton. The western fork of the River Adur will be crossed about 2km south of Partridge Green, west of Henfield.

1.3.95 Both rivers host annual swimming events attracting more than 350 participants each. The rivers are both also recognised as kayaking/ canoeing rivers, though they are both heavily tidal – restricting canoeing opportunities. Angling also takes place along both rivers. Both rivers have public footpaths following one or both banks.

Access Land

1.3.96 Access Land is land designated under the Countryside and Rights of Way (CROW) Act 2000, giving the public a right of access for the purposes of open-air recreation. The study area includes land that is registered common land and land that qualifies as ‘open country’ under CROW.

1.3.97 There is a small number of commons that are in the vicinity of the onshore cable corridor, but none are directly crossed. The commons within the zone of interest are:

- unnamed common adjoining Spur Road, Climping (CL48, TQ005008);
- Horsebridge Common (CL22, TQ180151);
- Bines Green (CL21, TQ184169); and
- Washington Common (CL258, TQ115140).

1.3.98 Three parcels of other Access Land are in the vicinity of the onshore cable corridor and one will be crossed, near the northern border of the SDNP, at Sullington Hill. There is a concentration of 'open country' access land along the northern border of the Downs, providing a large public access resource over approximately four miles of the National Park boundary.

1.3.99 The potentially affected Access Land parcels are at:

- Barpham Hill, TQ064103;
- Unnamed, TQ086113; and
- Sullington Hill, TQ096122.

Village Green

1.3.100 While not a registered common and therefore not technically Access Land, there is one village green that falls within the onshore cable corridor. This is the Washington Recreation Ground and Allotments Village Green which has one football pitch, one cricket pitch and parking for 12 vehicles. The village green lies directly on the onshore cable route and so could be temporarily disrupted. Two abutting parcels of land are also recognised as public green space, these are Jockey's Meadow and The Triangle, shown in **Figure 17.4, Volume 3** of the ES (Document Reference 6.3.17).

1.4 Tourism perception of wind farms

Introduction

1.4.1 This section undertakes a review of research examining the relationship between wind farms (both onshore and offshore), and associated infrastructure, on the visitor economy. Overall, there is a limited body of evidence relating to the extent to which offshore wind farms impact upon tourism. The primary research base can be divided into three broad groups focusing on (1) ex-ante research, (2) ex-post research and (3) wider research.

Ex-ante research

1.4.2 The ex-ante research covers a group of studies which have been carried out to ascertain and/ or explore potential reactions to wind farm developments. This group makes up the majority of the research base, and includes both scheme-

specific studies, which tend to focus on impacts on a highly localised area, as well as larger area assessments, which consider the cumulative effect that wind farm developments across a larger impact area could have on tourism activity.

1.4.3 The majority of scheme-specific ex-ante studies rely predominantly on perceptions-based survey research to draw conclusions about the potential for wind farm developments to affect visiting behaviour in the future. Although there is a lot of variation in the survey methods adopted (incl. study areas, sampling techniques and questions asked) making it difficult to directly compare the studies on a like-for-like basis, these assessments typically explore two types of effects, including:

- the extent to which the presence of a wind farm has an effect on the visitor experience; and
- visitors' views on whether the development of a wind farm might affect their future visiting behaviour.

1.4.4 This approach tends to lead to a high level of uncertainty about the scale of potential impacts, particularly as the evidence base is mixed and findings vary across studies.

1.4.5 Furthermore, much of the focus of the research has tended to be on the impact of WTGs, rather than the onshore transmission and/ or grid infrastructure (unless developments are using pylons in areas which have sensitivity to landscape designations or scale of tourism activity). This is due to the concerns of stakeholders typically being around the visual impacts of WTGs, with less concern about the transmission infrastructure unless it relies on pylons.

Ex-post research

1.4.6 This part of the research base is limited in its coverage. Ex-post studies explore and provide evidence of the actual effects of specific wind farm developments. Relevant studies in this group are focused on assessing the observed changes in visitor behaviour after a wind farm has been built and is operational. These studies explore observed effects as reported by visitors, sector bodies, tourism and other businesses.

1.4.7 The most helpful UK-based studies of offshore wind farm developments are studies carried out in relation to North Hoyle (Arup Economics and Planning, 2002) and Gwynt Y Môr (RWE Renewables, 2005) wind farms off the coast of North Wales. These were amongst the first offshore wind farm schemes nationally. Whilst there are several other offshore wind farms which have been operational for several years (including wind farms off the Norfolk coast), these have not yet been subject to any ex-post study in relation to tourism impacts.

Wider research

1.4.8 Alongside the thematic groups outlined above, there is also a wider body of literature which encompasses the following.

- Studies which provide secondary analysis of the evidence base (such as McGowan and Sauter (2005) and The Tourism Company (2012)) – Whilst

some of these evaluations are helpful, there are many which draw selectively on the available evidence and, as a result may not provide a full assessment of the evidence.

- Studies from overseas (such as North Carolina State University (2016)) - A slightly greater evidence base of studies has emerged from countries where the offshore wind sector has been established for longer. This includes both ex-ante and ex-post research.
- General perceptions-based studies (such as RCUK (2009) and Soini *et al*. (2011)) – Exploring attitudes towards wind farms and associated infrastructure in general (for instance, not in connection to a specific development and/ or proposal).
- General tourism surveys (such as Failte Ireland (2012) and Cardiff City and County Council (2012) – Which explore what tourists value about a particular tourism destination and factors which enhance or detract from their experience.

1.4.9 It should be noted that across all strands of the research base, there is limited coverage in peer-reviewed academic literature. The lack of peer reviewed academic research in this area does not invalidate the evidence that exists although it does highlight the extent to which the evidence base is not yet well-established. It is therefore necessary, when reviewing the evidence that exists, to consider the reliability of the methodologies used in available studies, particularly where survey research and impact assessment methods are used.

Impact on tourism

1.4.10 Overall, the research typically finds a large majority of visitors and tourism-related businesses in local areas affected by potential developments do not expect any impact. A study for the National Grid (ERM, 2014) states 'A clear finding is that the majority of recreational users on ex-post and ex-ante projects perceive that the project will have 'no impact' on their personal behaviour and spend'. Likewise, the proportions of visitors reporting that they were more or less likely to visit as a consequence of a wind farm development are typically small. The proportion expecting negative impacts (in terms of the visitor economy and/ or their own behaviour) is usually marginally greater than those expecting positive impacts.

1.4.11 Whilst the research points towards potential for some visitors to be discouraged from making future visits to an area affected by a wind farm development, this is usually balanced (and in some cases exceeded) by visitors reporting that they will visit more frequently. This conclusion is reinforced by research studies (such as Gossop (2007) and BiGGar Economics (2008)) which have assessed the impacts post development, pointing towards there being no evidence of significant lasting impact of wind farm development and operation (either positive or negative) on tourism. More recently Alem et al., (2020) recognised that there is no proof to suggest there is a negative impact from offshore windfarms on tourism. However, the study notes that there is often significant local concern about tourism impacts and that this evidence should be communicated to the local community as early as possible in the planning phase. The study recommends that locating windfarms more than 40km from the shore would minimise any potential negative impacts on tourism.

1.4.12 Hatch (2022) also gathered data on seaside tourism economics employment Evidence. The data described did not provide evidence that the development of large scale offshore wind farms near to significant seaside towns coincides with a decline in tourism employment either during or after construction. The trends in post completion employment in the tourism sector tended to be generally positive or neutral comparatively, it was noted that other economic forces probably play a larger part in determining trends of tourism and associated tourism employment.

1.4.13 The research also points that visitors and tourism-related businesses recognise the potential for positive impacts associated with extra expenditure within the sector and local economy arising from the construction activity, or in some instances the additional interest in the seeing of the development.

1.4.14 The research typically focuses on measuring opinions of what the impacts on the visitor economy could be prior to implementation of the scheme, with research being undertaken with a mix of visitors, tourism businesses, local residents and other stakeholders. However, there are few ex-post empirical studies identifying negative impacts on local visitor economies post-completion. A study by Glasgow Caledonian University (2008) suggests that even where there have been negative effects, these often occur in the form of displaced tourism with visitors diverting to neighbouring areas. More recent evidence has been gathered by Smythe et al (2020) who conducted a study through which tourism and recreation professionals and participants met in a focus group to discuss experiences with and observations of the 30-MW Block Island Wind Farm, the first offshore wind farm in the United States, located several miles offshore from an iconic tourism destination (New Shoreham, Rhode Island). Analysis revealed diverse viewpoints and largely positive encounters; though some negative impacts were identified as a concern (such as visual impacts). Perspectives were shaped in part, by experiences with the planning process. Most participants described the project's appearance in neutral or positive terms. Participants felt the wind farm should be promoted for tourism but cautioned that interest may be short-lived and there may be less support for larger offshore developments. The findings of this research support tourism and recreation sector engagement throughout offshore wind project planning and operation.

1.4.15 There are a complex range of factors which explain the attitudes of visitors to wind farm development and the consequences upon visiting behaviour. There is a need to be cautious in generalising but the evidence base (see for example Devine-Wright, 2007) points towards a tendency for younger people and those in higher socio-economic groups to be more accepting of wind farm development, in part influenced by their wider attitudes towards renewable energy and its role in addressing climate change. This sentiment is echoed in a 2010 paper (Ladenburg, 2010) which finds an overall positive attitude towards offshore wind farms, and suggests that attitudes tend to covariate negatively with household income and, and positively with level of education. In addition, this paper found that attitudes towards offshore wind farms appear to be significantly associated with demographics, but also suggests that attitudes are dependent on type and frequency of usage of the beach and coastal zone. The BEIS attitude survey (2021b) finds that older people were more likely to have changed their opinion of the threat of climate change over recent years. This could have an impact on the findings above in relation to the socio-economic characteristics of respondents.

1.4.16 A survey by Ipsos MORI (2014) of around 1,750 UK adults found that 76 percent of people surveyed, who had heard of wind farms supported their development. Although this report did not specifically survey tourists, it is still indicative of a generally positive outlook towards the construction of wind farms, whereby visiting areas with such an infrastructure should not deter most people from visiting.

1.4.17 The research base does not suggest that the extent to which tourists are attracted to an area by the quality of the landscape is important in determining visitors' reactions to wind farm developments. In addition, the research also states that visitors and tourism-related businesses usually recognise the potential for positive impacts associated with the extra expenditure in the sector, and the local economy arising from construction activity (or in some instances the additional interest in visiting the development).

1.4.18 Research by the Prof. Cara Aitchison at the University of Edinburgh on behalf of the Scottish Government's Renewables Inquiry (Aitchison, 2012) concluded by saying that 'the findings from both primary and secondary research relating to the actual and potential tourism impact of wind farms indicates that there will be neither an overall decline in the number of tourists visiting an area, nor any overall financial loss in tourism-related earnings as a result of a wind farm development'.

1.4.19 The literature suggests therefore that wind farm developments will not have a significant effect on the overall volume and value of tourism activity in most instances. Various studies (such as University of the West of England (2004); Ipsos MORI (2014); Glasgow Caledonian University (2008); Ladenburg (2010) and Regeneris Consulting and The Tourism Company (2014)) suggest that the majority of visitors do not expect their behaviour to be influenced (either positively or negatively) by the presence of wind farm developments.

1.4.20 Overall, the evidence outlined above suggests that offshore wind farm developments generate very limited, or no negative impact on tourist and recreational users during the construction and O&M phases. To some extent, this may depend on the circumstances, the nature of the local tourism facilities and offer, the types of visitors they attract, and the relationship between the facilities and the OWF on and offshore infrastructure. This is a useful way of thinking about the potential for impact but does not help to define specific thresholds for impact occurring as the evidence is not currently strong enough to allow this.

2. Glossary of terms and abbreviations

Table 2-1 Glossary of terms and abbreviations

Term (acronym)	Definition
AI	Artificial Intelligence
AONB	Area of Outstanding Natural Beauty
Baseline	Refers to existing conditions as represented by latest available survey and other data which is used as a benchmark for making comparisons to assess the impact of development.
Baseline conditions	The environment as it appears (or would appear) immediately prior to the implementation of the Proposed Development together with any known or foreseeable future changes that will take place before completion of the Proposed Development.
CfD	Contracts for Difference
Construction effects	Used to describe both temporary effects that arise during the construction phases as well as permanent existence effects that arise from the physical existence of development (for example new buildings).
C2CLEP	Coast to Capital Local Enterprise Partnership
DCO Application	An application for consent to undertake a Nationally Significant Infrastructure Project made to the Planning Inspectorate who will consider the application and make a recommendation to the Secretary of State, who will decide on whether development consent should be granted for the Proposed Development.
Decommissioning	The period during which a development and its associated processes are removed from active operation.
DECC	Department for Energy and Climate Change
Development Consent Order (DCO) Application	An application for consent under the Planning Act 2008 to undertake a Nationally Significant Infrastructure Project made to the Planning Inspectorate who will consider the application and make a recommendation to the Secretary of State, who will decide on whether development consent should be granted for the Proposed Development.

Term (acronym)	Definition
Direct employment and gross value added	Employment and gross value added which is associated with the first round of capital expenditure, for instance, Rampion 2's spend with prime contractors within each impact area of the study.
Economic activity rate	Economically active people are those aged over 16 who are either in employment or International Labour Organisation (ILO) unemployed. This group of people are those active in the labour force. The economic activity rate is the number of people who are economically active as a percentage of the total population.
Embedded environmental measures	Equate to 'primary environmental measures' as defined by Institute of Environmental Management and Assessment (2016). They are measures to avoid or reduce environmental effects that are directly incorporated into the design of the Proposed Development.
Environmental Impact Assessment (EIA)	The process of evaluating the likely significant environmental effects of a proposed project or development over and above the existing circumstances (or 'baseline').
Environmental measures	Measures which are proposed to prevent, reduce and where possible offset any significant adverse effects (or to avoid, reduce and if possible, remedy identified effects.
Environmental Statement (ES)	The written output presenting the full findings of the Environmental Impact Assessment.
ESCC	East Sussex County Council
EZ	Enterprise Zone
Full-time equivalent (FTE)	A unit for measuring employment which indicates the workload which indicates the workload associated with each post. One FTE is the equivalent of a full-time post, whilst an FTE of 0.5 suggests half-time.
Future baseline	Refers to the situation in future years without the Proposed Development.
GB	Great Britain
Gross value added (GVA)	The measure of the value of goods and services produced in an area, industry or sector of an economy. At the level of a firm, it is broadly equivalent to employment costs plus a measure of profit.

Term (acronym)	Definition
Horizontal Directional Drill (HDD)	A trenchless crossing engineering technique using a drill steered underground without the requirement for open trenches. This technique is often employed when crossing environmentally sensitive areas, major water courses and highways. This method is able to carry out the underground installation of pipes and cables with minimal surface disruption.
IMD	Index of Multiple Deprivation
Impact	The changes resulting from an action.
Indirect effects	Effects that result indirectly from the Proposed Development as a consequence of the direct effects, often occurring away from the site, or as a result of a sequence of interrelationships or a complex pathway. They may be separated by distance or in time from the source of the effects. Often used to describe effects on landscape character that are not directly impacted by the Proposed Development such as effects on perceptual characteristics and qualities of the landscape.
Indirect employment and gross value added	Employment and gross value added which is associated with the suppliers of companies that supply goods and services as part of the supply chain of the proposed Rampion 2.
LAF	Local Access Forum
Likely Significant Effects	It is a requirement of Environmental Impact Assessment Regulations to determine the likely significant effects of the Proposed Development on the environment which should relate to the level of an effect and the type of effect.
Local Enterprise Partnership (LEP)	Voluntary partnerships between local authorities and businesses set up in 2011, by the Department for Business, Innovation and skills to help determine local economic priorities and lead economic growth and job creation within the local area.
LQ	Location Quotient
LSOA	Lower Layer Super Output Areas
m	Metre

Term (acronym)	Definition
Magnitude (of change)	A term that combines judgements about the size and scale of the effect, the extent of the area over which it occurs, whether it is reversible or irreversible and whether it is short term or long term in duration'. Also known as the 'degree' or 'nature' of change.
MAGIC	Multi-agency Geographic Information for the Countryside
MW	Megawatt
NPPF	National Planning Policy Framework
Nationally Significant Infrastructure Project (NSIP)	Nationally Significant Infrastructure Projects are major infrastructure developments in England and Wales which are consented by DCO. These include proposals for offshore wind farms with an installed capacity over 100MW.
nm^2	Square Nautical Miles
ONS	Office for National Statistics
OPEX	Operating Expense / Expenditure
OS	Ordnance Survey
OWGP	Offshore Wind Growth Partnership
Preliminary Environmental Information Report (PEIR)	The written output of the Preliminary Environmental Impact Assessment undertaken for the Proposed Development. It was developed to support Statutory Consultation and presented the preliminary findings of the assessment to allow an informed view to be developed of the Proposed Development, the assessment approach that was undertaken, and the preliminary conclusions on the likely significant effects of the Proposed Development and environmental measures proposed.
Proposed Development	The development that is subject to the application for development consent, as described in **Chapter 4: The Proposed Development, Volume 2** of the ES (Document Reference: 6.2.4).
PRoW	Public Right(s) of Way: public footpaths, bridleways, restricted byways, or byways open to all traffic.
R&D	Research and Development
Receptor	These are as defined in Regulation 5(2) of The Infrastructure Planning 'Environmental Impact

Term (acronym)	Definition
	Assessment' Regulations 2017 and include population and human health, biodiversity, land, soil, water, air, climate, material assets, cultural heritage and landscape that may be at risk from exposure to direct and indirect impacts as a result of the Proposed Development.
RED	Rampion Extension Development Limited
Scoping Opinion	A Scoping Opinion is adopted by the Secretary of State for a Proposed Development.
Scoping Report	A report that presents the findings of an initial stage in the Environmental Impact Assessment process.
SDNP	South Downs National Park
SDNPA	South Downs National Park Authority
SDW	South Downs Way
Secretary of State (SoS)	The Minister for Department for Energy Security and Net Zero (DESNZ).
SELEP	South East Local Enterprise Partnerships
Sensitivity	A term applied to specific receptors, combining judgements of the susceptibility of the receptor to the specific type of change or development proposed and the value associated to that receptor.
Significance	A measure of the importance of the environmental effect, defined by criteria specific to the environmental aspect.
Significant effects	It is a requirement of the EIA Regulations 2017 to determine the likely significant effects of the development on the environment which should relate to the level of an effect and the type of effect. Where possible significant effects should be mitigated. The significance of an effect gives an indication as to the degree of importance (based on the magnitude of the effect and the sensitivity of the receptor) that should be attached to the impact described. Whether or not an effect should be considered significant is not absolute and requires the application of professional judgement. Significant – 'noteworthy, of considerable amount or effect or importance, not insignificant or negligible' (The Concise Oxford Dictionary).

Term (acronym)	Definition
	Those levels and types of landscape and visual effect likely to have a major or important / noteworthy or special effect of which a decision maker should take particular note.
Temporary or permanent effects	Effects may be considered as temporary or permanent. In the case of wind energy development the application is for a 30 year period after which the assessment assumes that decommissioning will occur and that the site will be restored. For these reasons the development is referred to as long term and reversible.
TCE	The Crown Estate
UK	United Kingdom
UNWTO	United Nations World Tourism Organisation
WSCC	West Sussex County Council
WTG	Wind Turbine Generator

3. References

AECOM. (2018). Brighton and Hove City Plan Part 2, Energy Study. Available at: https://ww3.brighton-hove.gov.uk/sites/brighton-hove.gov.uk/files/060218-BHCC-CPP2%20Energy%20Study%20(FINAL%20ISSUED).pdf [Accessed January 2021].

Aitchison, C. (2012). Tourism Impact of Wind Farms Submitted to Renewable Inquiry Scottish Government. Available at: http://www.parliament.scot/S4_EconomyEnergyandTourismCommittee/Inquiries/20120426_uni_of_ed.pdf [Accessed January 2021].

Alem, M. Herberz, T. Sankar Kranayil, V and Fardin, A. (2020) Literature Review - Qualitative meta-analysis of the socioeconomic impacts of offshore wind farms.

Arun District. (2018). Arun Local Plan. Available at: https://www.arun.gov.uk/download.cfm?doc=docm93jijm4n12844.pdf&ver=12984 [Accessed January 2021].

Arun District Council (2020) Carbon Neutral Strategy. Available at: download.cfm (arun.gov.uk)

Arup Economics and Planning. (2002). Socio-economic impact assessment of North Hoyle offshore wind farm.

BiGGar Economics. (2008). Wind farms and tourism trends in Scotland.

Brighton & Hove City Council. (2016). Brighton & Hove City Plan Part One. Available at: https://www.brighton-hove.gov.uk/sites/default/files/migrated/article/inline/FINAL%20version%20cityplan%20March%202016compreswith%20forward_0.pdf [Accessed January 2021].

Coast to Capital, Build Back Stronger Smarter Greener. (2021). Available at: https://www.coast2capital.org.uk/stronger-smarter-and-greener

Coast to Capital, Enterprise M3 and South East LEP (C2CLEP). (2018). Local Energy Strategy. Available at: https://www.southeastlep.com/app/uploads/2019/03/Local-Energy-Strategy-FINAL.pdf [Accessed January 2021].

Coast to Capital. (2018). Gatwick 360 The Coast to Capital Strategic Economic Plan 2018-2030. Available at: https://www.coast2capital.org.uk/storage/downloads/coast_to_capital_strategic_economic_plan_2018-2030_pdf-1535099447.pdf [Accessed January 2021].

Cardiff City and County Council. (2012). Cardiff Visitor Survey.

Department for Business, Energy & Industrial Strategy. (2020). Policy Paper Offshore Wind Sector Deal - one year on. Available at: https://www.gov.uk/government/publications/offshore-wind-sector-deal/offshore-wind-sector-deal-one-year-on [Accessed January 2021].

Department for Business, Energy & Industrial Strategy. (2021b). BEIS Public Attitudes Tracker.

Department of Energy and Climate Change (DECC). (2011a). National Policy Statement for Electricity Networks Infrastructure (EN-5).

Department of Energy and Climate Change (DECC) (2011b). National Policy Statement for Renewable Energy Infrastructure (EN-3).

Department of Energy and Climate Change (DECC). (2011c). Overarching National Policy Statement for Energy (EN-1).

Department for Energy Security and Net Zero (2023a) Draft Overarching National Policy Statement for energy (EN-1) . Available at: https://www.gov.uk/government/consultations/planning-for-new-energy-infrastructure-revisions-to-national-policy-statements [Accessed: 15 June 2023].

Department for Energy Security and Net Zero (2023b) Draft National Policy Statement for Renewable Energy Infrastructure (EN-3). Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1147382/NPS_EN-3.pdf [Accessed: 15 June 2023].

Devine-Wright. (2007). Reconsidering public attitudes and public acceptance of renewable energy technologies: A critical review.

Environment Agency. (n.d.). Bathing Water Quality. Available at: http://environment.data.gov.uk/bwq/profiles/ [Accessed February 2021].

ERM. (2014). A Study into the Effect of National GRid Major infrastructure Projects on Socio-economic Factors: Business and Recreational User Surveys Report.

East Sussex County Council (ESCC). (2014a). East Sussex Cultural Strategy, 2013-2023. Available at: https://www.eastsussex.gov.uk/media/1320/countywide-cultural-strategy-ebook.pdf [Accessed January 2021].

East Sussex County Council (ESCC). (2014b). East Sussex Growth Strategy, Doing Business Brilliantly 2014-2020. Available at: https://www.eastsussex.gov.uk/media/1802/eastsussexgrowthstrategydec2014.pdf [Accessed January 2021].

East Sussex County Council (ESCC). (2021.). Sussex Visitor Economy Baseline Report.

Failte Ireland. (2012). Visitor Attitudes on the Environment - Wind Farms.

Financial Times. (2020). UK economy shrinks by record 20% in April. Available at: https://www.ft.com/content/f25dc58b-32c9-499d-af66-f677f20c53a2 [Accessed January 2021].

Glasgow Caledonian University. (2008). The Economic Impact of Wind Farms on Scottish Tourism: A report for the Scottish Government.

Gossop. (2007). Fullabrook Down Wind Farm: Inspector's Evidence.

Hatch (2022) Awel y Môr Offshore Wind Farm, Category 6: Environmental Statement, Volume 5, Annex 4.2: Seaside Tourism Economics Employment Evidence. Available at: Volume 5, Annex 4.2: Seaside Tourism Economics Employment Evidence (awelymor.cymru) [Accessed November 2022].

HM Government. (2011). UK Marine Policy Statement.

HM Government. (2017a). Industrial Strategy, Building a Britain fit for the future.

HM Government. (2017b). The Clean Growth Strategy, Leading the way to a low carbon future.

HM Government. (2019a). Industrial Strategy, Offshore Wind Sector Deal.

HM Government. (2019b). Tourism Sector Deal.

HM Government (2021) Net Zero Strategy: Build Back Greener. [online] Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1033990/net-zero-strategy-beis.pdf [Accessed: 15 June 2023].

HM Government. (2022a). British Energy Strategy.

HM Treasury (2021) Build Back Better: Our Plan for Growth. [online]. Available from: https://www.gov.uk/government/publications/build-back-better-our-plan-for-growth [Accessed August 2023].

Horsham District Council. (2015). Horsham District Planning Framework (excluding South Downs National Park). Available at: https://www.horsham.gov.uk/__data/assets/pdf_file/0016/60190/Horsham-District-Planning-Framework-November-2015.pdf [Accessed January 2021].

Ipsos MORI. (2014). Public Attitudes to Science Report by Ipsos MORI for the Department for Business, Innovation and Skills and the Economic Social Research Council.

Ladenburg, J. (2010) Attitudes towards offshore wind farms - The role of beach visits on attitude and demographic and attitude relations. Energy Policy. 381297–1304.

McGowan, F. and Sauter, R. (2005). Public opinion on energy research: A desk study for the research councils.

Ministry for Housing, Communities & Local Government. (2019). National Planning Policy Framework.

Mid Sussex District Council. (2018). Mid Sussex District Plan, 2014-2031. [online]. Available from: https://www.midsussex.gov.uk/media/3406/mid-sussex-district-plan.pdf.

North Carolina State University. (2016). Near-shore wind farms would have big impact on coastal tourism. Available at: https://phys.org/news/2016-04-near-shore-farms-big-impact-coastal.html [Accessed January 2021].

Office for National Statistics (ONS). (2019). Index of Multiple Deprivation.

Office for National Statistics (ONS). (2020). 2018-based Subnational Population Projections.

Office for National Statistics (ONS). (2021a). Annual Survey of Hours and Earnings.

Office for National Statistics (ONS). (2021b). Mid Year Population Estimates.

Office for National Statistics (ONS). (2022a). Annual Population Survey.

Office for National Statistics (ONS). (2022b). Business Register and Employment Survey.

Office for National Statistics (ONS). (2022c). Nominal regional gross value added (balanced) per head and income components.

Office for National Statistics (ONS). (2022d). Claimant Count.

Offshore Renewable Energy Catapult (2013). Accessible (What we do - ORE (catapult.org.uk))

RCUK. (2009). Public attitudes to Environmental Change: A Selective Review of Theory and Practice.

Regeneris Consulting & The Tourism Company (2014) Study into the Potential Economic Impact of Wind Farms and Associated Grid Infrastructure on the Welsh Tourism Sector.

RWE N Power Renewables. (2005). Socio-economic impact assessment of the Gwynt y Mor offshore wind farm.

Smythe, T., Bidwell, D., Moore, A., Smith, H., McCann, J. (2020) Beyond the beach: Tradeoffs in tourism and recreation at the first offshore wind farm in the United States

South Downs National Park Authority (SDNPA). (2019). South Downs Local Plan (2014-33). Available at: https://www.southdowns.gov.uk/wp-content/uploads/2019/07/SD_LocalPlan_2019_17Wb.pdf [Accessed January 2021].

South East LEP (SELEP). (2014). South East LEP Growth Deal and Strategic Economic Plan. Available at: https://www.southeastlep.com/app/uploads/Strategic_Economic_Plan_2014.pdf [Accessed January 2021].

Soini, K., Pouta, E., Salmiovirta, M. and Kivinen, T. (2011). Local Residents' Perceptions of Energy Landscape: The Case for Transmission Lines. *Land Use Policy,* 28(1), 294–305.

Sussex Inshore Fisheries and Conservation Authority (IFCA). (n.d.). Recreational Fishing. Available at: https://www.sussex-ifca.gov.uk/recreational-fishing [Accessed February 2021].

Sussex Inshore Fisheries and Conservation Authority (IFCA). (2017). Recreational Sea Anglig Strategy, 2017. Available at: https://secure.toolkitfiles.co.uk/clients/34087/sitedata/files/Sussex-Sea-Angling-Strategy-final.pdf [Accessed February 2021].

Sussex Visitor Economy, July 2021. Sussex Visitor Economy Vision and Medium Term Actions (https://www.experiencewestsussex.com/wp-content/uploads/2022/03/Sussex-Visitor-Economy-Vision-and-Actions.pdf)

Team East Sussex. (2020). East Sussex Reset, Six missions: Recovery as opportunity. Available at: https://www.eastsussex.gov.uk/media/16223/east-sussex-reset-recovery-as-opportunity.pdf [Accessed January 2021].

The Tourism Company. (2012). The impact of wind turbines on tourism - A literature review.

Tourism South East. (2014). The Economic Impact of Tourism on Brighton and Hove, 2014.

Tourism South East. (2015). The Economic Impact of Tourism on Brighton and Hove, 2015.

Tourism South East. (2016). The Economic Impact of Tourism on Brighton and Hove, 2016.

Tourism South East. (2017). The Economic Impact of Tourism on Brighton and Hove, 2017.

Tourism South East. (2018a). Brighton Visitor Survey, 2018. Available at: https://www.visitbrighton.com/dbimgs/Visitor%20Survey%20Report%202018.pdf. [Accessed January 2021]

Tourism South East. (2018b). The Economic Impact of Tourism on Brighton and Hove, 2018.

Tourism South East. (2019a). The Economic Impact of Tourism on Brighton and Hove, 2019.

Tourism South East. (2020). The Economic Impact of Tourism on Brighton and Hove, 2020.

Tourism South East. (2019b). The Economic Impact of Tourism on Hastings, 2019.

University of the West of England. (2004). Fullabrook Wind Farm Proposal Evidence of the impact of wind farms on tourism numbers and tourist experience for North Devon Wind Power.

United National World Tourism Organisation (UNWTO). (2019). UNWTO Tourism Definitions. Available at: https://www.e-unwto.org/doi/epdf/10.18111/9789284420858 [Accessed January 2021].

Visit England. (2022). Visitor Attraction Trends in England 2021,

Visit South East England. (2021). Blue Flag Beaches 2021. Available at: https://www.visitsoutheastengland.com/things-to-do/blue-flag-beaches [Accessed February 2021].

West Sussex County Council (WSCC). (2012). West Sussex County Council Interactive Map (iMap). Available from: http://www2.westsussex.gov.uk/lvmaps/imap.html [Accessed February 2021].

West Sussex County Council (WSCC). (2017). The West Sussex Plan, 2017-2022. Available at: https://www.westsussex.gov.uk/media/11856/the_west_sussex_plan.pdf [Accessed January 2021].

West Sussex County Council (WSCC). (2018a). West Sussex Economic Growth Plan 2018-2023. Available at: https://www.westsussex.gov.uk/media/11971/economic_growth_plan.pdf [Accessed January 2021].

West Sussex County Council (WSCC). (2018b). West Sussex Rights of Way Management Plan, 2018-2028.

West Sussex County Council (WSCC). (2020). West Sussex Economy Reset Plan (Draft). Available at: https://westsussex.moderngov.co.uk/documents/s17657/Item%205%20-%20Appendix%20A%20-%20Economy%20Reset%20Plan.pdf [Accessed January 2021].

Annex A Public Right of Way (PRoW) potentially affected by Rampion 2

The following table lists PRoW potentially affected by the onshore temporary cable corridor, and their relative levels of use, as assessed from Strava Global Heatmap, Google Earth and walk-over survey.

In order to indicate if a path is within the South Downs National Park (SDNP) the following symbols have been used: ‘y’ = yes and ‘n’ = no.

Please note that the Strava categorisation is based on the following scale: '1' = very light, '2' = light use, '3' = light to moderate, '4' = moderate to light, '5' = moderate use, '6' = moderate to frequent, '7' = frequent use, '8' = heavy/very frequent use.

Page intentionally blank

Table A-1 Sensitivity of PRoW potentially affected by Rampion 2

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Climping	829	Footpath	n	7	High	Part of planned England Coast Path is subject to an unresolved application to upgrade it to a Restricted Byway.
Climping	829_1	Footpath	n	1	Low	Path is a short spur off 174.
Climping	169	Footpath	n	4	Low	Within 500m of access route. Low impact expected.
Climping	171	Footpath	n	1	Low	Within 500m but low impact expected.
Climping	197	Byway open to all traffic	n	5	Medium	Probable haul road/access route.
Climping	173	Footpath	n	2	Low	Path will be affected for more than 1km.
Climping	172	Footpath	n	1	Low	Path crossed by access route but low impact expected.
Climping	174	Footpath	n	2	Low	Alternative routes available. (Path partially subject to application to upgrade to Restricted Byway. Not yet determined).

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Climping	168	Footpath	n	2	Low	Possible access route that will affect path for approximately 1km.
Climping	206	Footpath	n	4	Low	Riverside path on levy (LAF has advised of aspiration for bridleway status as part of active travel route).
Lyminster and Crossbush	2165	Footpath	n	6	Low	Terminus with A284 may be affected and need small diversion.
Lyminster and Crossbush	2163	Bridleway	N	2	Low	Will be used as an access route.
Lyminster and Crossbush	2163_1	Footpath	N	1	Low	Crossed by open trench. Temporary local diversion or closure needed.
Lyminster and Crossbush, and Poling	2202_1	Footpath	n	2	Low	Crossed by open trench. Temporary local diversion or closure needed.
Warningcamp	2218	Footpath	y	2	Low	Within 500m but expect low impact.
Burpham	2213	Bridleway	y	3	Low	Within 500m but expect low impact.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Warningcamp	2213	Bridleway	y	4	Medium	Within 500m of access route but expect low impact, but part of Monarch's Way.
Warningcamp	2220_1	Footpath	y	4	Low	Within 500m of access route but expect low impact.
Warningcamp	3740	Bridleway	y	8	Medium	Feeder route to/ from Monarch's Way. Access route for HGV.
Burpham	2219	Bridleway	y	4	Medium	Within 500m of access route but expect low impact.
Burpham	2221	Bridleway	y	6	Medium	Within 500m of access route at its southern end but expect low impact.
Burpham	2215	Bridleway	Y	4	Low	Alternative routes available. Terminates at 2211 access route to south but expect low impact.
Burpham	2214	Bridleway	Y	6	Medium	Alternative routes available. Terminates at 2211 access route to south but expect low impact.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Burpham & Warning Camp	2212	Bridleway	Y	4	Medium	Part of Monarch's Way but alternative routes available. Within 500m of access route but expect low impact. Offers alternative route to 3740, though less direct.
Burpham	2226	Footpath	y	6	Low	Within 500m, expect some impact at paths junction, but alternative available via 2256.
Angmering	2260	Bridleway	y	7	Medium	Connects to BW2208_1 which is crossed by cable corridor, but will not be directly impacted.
Angmering	2188_1	Footpath	Y	4	Low	Within 500m but low impact expected.
Angmering	2187_1	Bridleway	Y	7	Medium	Link to key crossing of A27. Access route at southern end.
Angmering	2186	Footpath	Y	3	Low	Link path off 2187_1. Abuts access route at west end but low impact expected.
Angmering	2187	Footpath	Y	4	Low	Each end abuts an access route but low impact expected.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Angmering	2188	Bridleway	Y	4	Low	Crossed by corridor near its southern end, also used as access route from A27.
Angmering	2190	Footpath	Y	1	Low	Crossed by cable corridor at its southern end. Alternative routes available locally.
Angmering	2192_2	Bridleway	Y	4	Low	Strava data show that an informal route runs to the east providing a convenient alternative. The route will join the 2211, 2175 access route but expect low impact.
Angmering	2192	Bridleway	Y	5	Low	Strava data show that an informal route runs to the west providing a convenient alternative. The route will join the 2211 access route but expect low impact.
Angmering	2192_1	Footpath	Y	1	Low	Within 500m but far side of A27 so no impact expected.
Angmering	2176	Footpath	N	1	Low	Crossed by cable corridor.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Angmering	2198	Footpath	N	1	Low	Crossed by cable corridor.
Angmering	2199	Footpath	N	3	Low	Crossed by corridor but alternative routes available locally.
Angmering & Poling	2200	Footpath	N	1	Low	Cable corridor runs over footpath for about 300m. Potential for significant magnitude of impact but low-use path.
Poling	2201	Footpath	N	3	Low	Within 500m but expect low impact.
Poling	2155	Footpath	N	3	Low	Within 500m but expect low impact.
Poling	3906	Footpath	N	3	Low	Within 500m but expect low impact.
Patching	2264	Bridleway	y	6	High	Part of Monarch's Way. Crossed by access route on estate road, expect low impact.
Patching	2174	Bridleway	Y	4	Low	Crossed by access route.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Patching	2174_1	Footpath	Y	5	Medium	Crossed by cable corridor. Alternative route via 2208.
Patching	2182_1	Footpath	Y	3	Low	Within 500m but low impact expected.
Patching	2182	Footpath	Y	2	Low	Within 500m but low impact expected.
Patching	2186_1	Footpath	Y	6	Medium	Forms part of well-used north-south route within 500m of corridor. Shielded by woodland so low impact expected.
Patching	2175	Bridleway	Y	6	High	Part of Monarch's Way. Crossed by cable corridor and partly used as an access route. Woodland route with alternative trails (unofficial) throughout the wood.
Patching	2211	Bridleway	Y	7	High	Part of Monarch's Way. Will be used as an access route.
Patching	2180_1	Bridleway	Y	6	Medium	Access route/ Monarch's Way abuts its northern terminus. Low impact expected.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Patching	2180	Footpath	Y	3	Low	Within 500m at northern end but low impact expected.
Patching	2185	Footpath	Y	5	Medium	Within 500m but low impact expected.
Patching	2263	Footpath	Y	1	Low	Crossed by access route.
Clapham	2091	Bridleway	y	7	High	Part of Monarch's Way. Crossed by access route on estate road, expect low impact.
Patching	2208	Bridleway	Y	6	High	Part of Monarch's Way. Within 500m for several hundred metres but low impact expected. Crossed by cable corridor (not on Monarch's Way) – temporary diversion possible via fp2188_1 & fp2174_1.
Patching	2210	Footpath	Y	2	Low	Within 500m but low impact expected.
Patching	2211_1	Footpath	Y	1	Low	Within 500m but low impact expected.
Patching	2208_2	Footpath	y	1	Low	Within 500m but low impact expected.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Patching	2260_1	Footpath	y	2	Low	Within 500m but low impact expected.
Patching	2262	Footpath	y	2	Low	Within 500m but low impact expected.
Patching	2173	Bridleway	y	6	Medium	Crossed by onshore cable corridor and may require local temporary diversion, or diversion onto alternative bridleway. Also used along much of its length as an access route.
Patching	2209	Bridleway	Y	5	Medium	Within 500m but low impact, although may see an increase in traffic as an alternative to 2173.
Patching	2208_1	Bridleway	Y	5	Medium	Crossed by cable corridor, also access route from the south.
Storrington and Sullington	2282_1	Bridleway	Y	4	Low	Crossed by onshore cable corridor and may require local temporary diversion, or

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
						diversion onto alternative bridleway.
Storrington and Sullington, & Findon	2092	Restricted byway	Y	8	High	South Downs Way. Critical crossing point near a major junction of paths. Follows ridgeline, so users will see the works even if not directly impacted. The RB continues south from the SDW as an arterial route to Worthing. This section will be an access route for HGV.
Findon	2093	Restricted byway	Y	7	High	Within 500m of access route. Indirect impact from interruptions to 2092.
Findon	2103_1	Footpath	Y	1	Low	Within 500m of access route but expect low impact.
Findon	2104	Footpath	Y	1	Low	Within 500m of access route but expect low impact.
Findon	2107	Bridleway	Y	5	Medium	Short connecting path. Within 500m but expect low impact other than as a result of vehicle traffic on 2092.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Findon	2103	Bridleway	Y	5	Medium	Short connecting path. Within 500m but expect low impact other than as a result of vehicle traffic on 2092.
Findon	2283	Bridleway	Y	4	Low	Within 500m but expect low impact other than as a result of vehicle traffic on 2092.
Findon	2106	Bridleway	Y	5	Medium	Within 500m but expect low impact other than as a result of vehicle traffic on 2092.
Findon	2108	Bridleway	Y	2	Low	Within 500m but expect low impact other than as a result of vehicle traffic on 2092.
Findon	2109	Bridleway	Y	7	Medium	Within 500m but expect low impact other than as a result of vehicle traffic on 2092.
Storrington and Sullington	2693	Restricted bridleway	y	8	High	Continuation of SDW on ridgeline, so there will be visual intrusion if not directly crossed. Both 2693 and 2092 may be heavily impacted during crossing works.
Storrington and Sullington	2108_1	Bridleway	y	6	Low	Route of bridleway is contiguous with access route

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
						for SDW crossing. May need temporary closure but alternative route exists via 2282 & 2696, however, 2696 is probably much steeper.
Storrington and Sullington	2282	Bridleway	y	3	Low	Within 500m. Expect impact and loss of amenity but can provide alternative to 2108_1.
Storrington and Sullington	2689	Bridleway	Y	2	Low	Within 500m. Could be used as part of a diversion route. But will be affected by proximity to access route on 2108_1.
Washington	2665	Bridleway	y	7	Medium	Crossed by onshore cable corridor and may require local temporary diversion, or diversion onto alternative bridleway.
Storrington and Sullington	2665	Bridleway	y	7	Medium	Crossed by onshore cable corridor and may require local temporary diversion, or diversion onto alternative bridleway. Will partially be an access route.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Storrington and Sullington	2691	Bridleway	y	4	Low	May be used as an access route and so considerably impacted. Could use alternative bridleway/minor road/track access for riders but could require more use of A283. Will require signage well in advance to warn users of any closure.
Washington	2697	Bridleway	y	7	Medium	May be used as an access route and so considerably impacted. Will be crossed by cable corridor. Could use alternative bridleway/minor road/track access for riders but could require more use of A283. Will require signage well in advance to warn users of any closure.
Washington	2623	Bridleway	y	6	Medium	Within 500m but expect low impact - unless the bridleway is promoted as a diversion route. Then can expect some increase in traffic.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Washington	2698	Footpath	y	0	Low	No discernible trace on Strava or Google Earth.
Washington	2666	Bridleway	y	6	Medium	Within 500m but expect low impact - unless the bridleway is promoted as a diversion route. Then can expect some increase in traffic.
Washington	2089_2	Footpath	y	2	Low	Within 500m but expect low impact.
Washington	2699	Footpath	y	1	Low	Within 500m but expect low impact.
Washington	2701	Footpath	n	2	Low	Crossed at its southern end. Temporary diversion may be needed.
Washington	2700	Footpath	n	1	Low	Within 500m but expect low impact.
Washington	2630	Footpath	y	6	Low	Within 500m but expect low impact. Runs through Washington Common, which falls partly within 500m but not expected to be significantly impacted.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Washington	2703	Bridleway	y	2	Low	Crossed. Will need local diversion.
Wiston	2709	Footpath	n	2	Low	Within 500m but expect low impact.
Wiston	2710	Footpath	n	2	Low	Crossed. Will need diversion.
Wiston	2711	Bridleway	n	2	Low	Crossed. Will need diversion. May also be access route to corridor from A283.
Wiston	2514	Footpath	n	2	Low	Crossed. Will need diversion. May also be access route from Spithandle Lane.
Ashurst	2594	Bridleway	n	2	Low	Crossed. Will need diversion (Private vehicular route).
Ashurst	2589_1	Bridleway	n	2	Low	Access route from Spithandle Lane. Cable corridor will cross. Will need diversion.
Ashurst	1868	Bridleway	n	2	Low	AKA Spithandle Lane. Within 500m but not likely to be significantly affected.
Ashurst	2589	Footpath	n	2	Low	Within 500m but expect low impact.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Ashurst	2588	Footpath	n	2	Low	Crossed. Will need diversion.
Ashurst	2583_2	Footpath	N	2	Low	Within 500m but expect low impact.
Ashurst	2950	Footpath	n	2	Low	Within 500m but expect low impact.
Ashurst	2519	Footpath	n	2	Low	Crossed in two places. Will need diversion (Private vehicular route). Might be used as access road at both locations. C. 600m might be affected, so could be significant impact.
Ashurst	2520	Footpath	n	3	Low	Crossed. Will need diversion
Ashurst	2518	Footpath	n	2	Low	Within 500m but expect low impact.
Ashurst	3202	Footpath	n	2	Low	Riverside path on west bank. Not likely to be significantly impacted, however, access to the riverside may be affected if 2519 and /or 2520 are blocked.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Henfield	3200	Footpath	n	6	Low	Riverside path on east bank. Not likely to be significantly impacted, thought there may be noise for some weeks while work progresses, including Horizontal Directional Drilling (HDD) under River Adur west fork.
West Grinstead	2372	Footpath	n	2	Low	North of B2135 - Within 500m but expect low impact. There could be significant impact from Bines Farm for 300m north if concurrent with access road.
West Grinstead	3514	Bridleway	n	8	High	Downs Link. Will need to be crossed. Busy route on railway embankment. Needs HDD to reduce impact.
West Grinstead	2374	Footpath	n	2	Low	Crossed. Will need diversion.
West Grinstead	2372_2	Bridleway	n	8	High	Access route for Downs Link/Sustrans regional route 223. Access will need to be maintained. Also access route to cable corridor.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
West Grinstead	2373	Footpath	n	2	Low	Within 500m but expect low impact.
West Grinstead	2372_1	Footpath	n	1	Low	Within 500m and serves Downs Link. Partially also access route to cable corridor.
West Grinstead	1841_1	Footpath	n	1	Low	Link path that may be affected if 2372_1 or 1841 are blocked. 2808 offers an alternative route.
West Grinstead	2808	Footpath	n	2	Low	Within 500m. May be affected depending upon access to B2116 near Dunstan's Farm.
West Grinstead	1761	Footpath	n	1	Low	Within 500m. May be minor impact depending upon arrangements at Dunstan's Farm access. But route could remain open.
West Grinstead	2800	Bridleway	n	2	Low	Within 500m. May be minor impact depending upon arrangements at Dunstan's Farm access. But route could remain open.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
West Grinstead	1774	Bridleway	n	2	Low	Reeds Lane. Unlikely to be affected unless 2800 is closed.
Shermanbury	1774	Bridleway	n	2	Low	Minor disturbance only at the eastern junction with A281.
Cowfold	1772	Footpath	n	2	Low	Within 500m but expect low impact.
Cowfold	1776	Footpath	n	2	Low	Impact will depend upon use and layout of access road through Little Parkminster. Continuation of path to Park Farm could provide alternative for 1781 and vice versa.
Cowfold	1776_1	Footpath	N	2	Low	Will be crossed but alternative available using 1781. Expect low impact.
Cowfold	1781	Footpath	n	2	Low	Crossed but could be mutual diversion route with 1776_1.
Cowfold	1770	Footpath	n	2	Low	Within 500m but expect low impact.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Cowfold	1782	Footpath	n	5	Low	Crossed but alternative routes available via 1784 or 1776_1. Expect low impact.
Shermanbury	2378	Footpath	n	2	Low	Within 500m but expect low impact.
Shermanbury	2377	Footpath	n	2	Low	Within 500m but expect low impact (Shielded by trees).
Shermanbury	1785	Bridleway	n	5	Low	Within 500m but expect low impact.
Shermanbury	2383	Footpath	n	2	Low	Within 500m but expect low impact.
Shermanbury	2380	Footpath	n	2	Low	Within 500m but expect low impact.
Shermanbury	1781	Footpath	n	2	Low	Crossed at western end but could be mutual diversion route with 1776_1.
Twineham	8T	Footpath	n	2	Low	Within 500m but low impact expected.
Shermanbury	1776_1	Footpath	n	2	Low	Crossed. Will need diversion – for example, 1781.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Cowfold	1730	Bridleway	n	6	Medium	Within 500m but low impact expected.
Shermanbury	1782	Footpath	n	5	Low	Crossed at northern end. Potential for local alternative via 1784/1783.
Cowfold	1783	Footpath	n	2	Low	Crossed. Potential for local alternative via 1784/1783.
Cowfold	1784	Footpath	n	2	Low	Within 500m, potential for impact at western end. Part of good local network.
Cowfold	1785	Bridleway	n	6	Low	Within 500m but expect low impact.
Cowfold	1788	Footpath	n	2	Low	Within 500m but expect low impact.
Cowfold	1787	Footpath	n	2	Low	Crossed. Potential for local alternative.
Cowfold	1789	Footpath	n	2	Low	Crossed. Will need diversion.
Cowfold	1790	Footpath	n	2	Low	Within 500m but expect low impact.
Cowfold	1791	Footpath	n	2	Low	Within 500m but expect low impact.

Parish	Path No.	Path Type	Within SDNP? (y/ n)	Strava	Sensitivity of the PRoW	Notes
Cowfold	1792	Footpath	n	2	Low	Within 500m but expect low impact.
Bolney	32Bo	Footpath	n	2	Low	Within 500m but expect low impact.
Bolney	36Bo	Footpath	n	2	Low	Within 500m but expect low impact.
Twineham	1T	Footpath	n	2	Low	Crossed. May need short-term diversion. Joins 36Bo.
Bolney	32Bo	Footpath	n	2	Low	Within 500m but expect low impact.
Bolney	34Bo	Footpath	n	2	Low	Within 500m but expect low impact.
Cowfold	1775	Footpath	n	2	Low	Within 500m but expect low impact.
Cowfold	1777	Footpath	n	3	Low	Within 500m but expect low impact.
Cowfold	1778	Footpath	n	2	Low	Within 500m but expect low impact.
Cowfold	1780	Footpath	n	2	Low	Within 500m but expect low impact.

Annex B Daily user counts from three locations on the Downs Link

Table B-1 Daily user counts from three locations on the Downs Link

	Date	Rudgwick	Henfield	West Grinstead	Date	Rudgwick	Henfield	West Grinstead
Sun	9/2/2020	38	126	51	7/6/2020	606	1024	813
Mon	10/2/2020	63	212	69	8/6/2020	310	601	320
Tue	11/2/2020	89	256	64	9/6/2020	315	864	357
Wed	12/2/2020	70	249	118	10/6/2020	117	481	173
Thu	13/02/2020	19	155	82	11/6/2020	172	454	238
Fri	14/02/2020	88	268	97	12/6/2020	198	405	236
Sat	15/02/2020	113	284	155	13/06/2020	562	1135	702
Sun	16/02/2020	62	234	72	14/06/2020	472	2488	844
Mon	17/02/2020	82	252	109	15/06/2020	291	926	328
Tue	18/02/2020	79	266	96	16/06/2020	297	632	360
Wed	19/02/2020	91	214	76	17/06/2020	129	1080	169
Thu	20/02/2020	30	178	78	18/06/2020	148	433	194
Fri	21/02/2020	93	273	160	19/06/2020	217	817	394
Sat	22/02/2020	163	375	281	20/06/2020	558	812	804
Sun	23/02/2020	145	289	137	21/06/2020	357	1004	629
Mon	24/02/2020	28	145	33	22/06/2020	249	768	498

	Date	Rudgwick	Henfield	West Grinstead	Date	Rudgwick	Henfield	West Grinstead
Tue	25/02/2020	72	194	132	23/06/2020	288	853	524
Wed	26/02/2020	59	267	105	24/06/2020	249	3046	354
Thu	27/02/2020	55	181	71	25/06/2020	240	495	363
Fri	28/02/2020	61	161	51	26/06/2020	250	525	375
Sat	29/02/2020	106	288	164	27/06/2020	255	442	287
Sun	1/3/2020	194	506	272	28/06/2020	599	2355	861
Mon	2/3/2020	63	237	87	29/06/2020	234	3185	291
Tue	3/3/2020	154	255	116	30/06/2020	155	265	151
Wed	4/3/2020	52	196	40	1/7/2020	250	629	412
Thu	5/3/2020	41	118	19	2/7/2020	183	532	292
Fri	6/3/2020	116	284	92	3/7/2020	273	571	416
Sat	7/3/2020	171	367	258	4/7/2020	370	482	471
Sun	8/3/2020	162	526	235	5/7/2020	492	1879	826
Mon	9/3/2020	72	247	102	6/7/2020	227	1267	394
Tue	10/3/2020	76	227	61	7/7/2020	320	519	316
Wed	11/3/2020	76	240	84	8/7/2020	128	345	184
Thu	12/3/2020	69	240	76	9/7/2020	224	469	278
Fri	13/03/2020	84	351	131	10/7/2020	242	1101	421
Sat	14/03/2020	184	463	269	11/7/2020	518	1138	840
Sun	15/03/2020	201	432	278	12/7/2020	477	1435	918

	Date	Rudgwick	Henfield	West Grinstead	Date	Rudgwick	Henfield	West Grinstead
Mon	16/03/2020	96	372	147	13/07/2020	243	578	403
Tue	17/03/2020	104	313	93	14/07/2020	242	471	330
Wed	18/03/2020	115	313	138	15/07/2020	278	555	394
Thu	19/03/2020	79	267	120	16/07/2020	210	541	352
Fri	20/03/2020	155	328	102	17/07/2020	278	812	424
Sat	21/03/2020	231	631	445	18/07/2020	508	1174	646
Sun	22/03/2020	301	650	601	19/07/2020	312	784	562
Mon	23/03/2020	197	563	227	20/07/2020	227	1093	379
Tue	24/03/2020	222	483	210	21/07/2020	274	860	324
Wed	25/03/2020	257	577	314	22/07/2020	241	819	303
Thu	26/03/2020	216	1942	260	23/07/2020	235	588	340
Fri	27/03/2020	262	610	254	24/07/2020	382	563	328
Sat	28/03/2020	269	441	354	25/07/2020	243	783	244
Sun	29/03/2020	181	362	154	26/07/2020	401	1552	872
Mon	30/03/2020	152	413	149	27/07/2020	129	334	146
Tue	31/03/2020	195	559	203	28/07/2020	245	1026	472
Wed	1/4/2020	260	471	228	29/07/2020	292	771	484
Thu	2/4/2020	232	505	194	30/07/2020	229	2421	415
Fri	3/4/2020	281	535	261	31/07/2020	206	3603	316
Sat	4/4/2020	326	637	397	1/8/2020	333	1122	571

	Date	Rudgwick	Henfield	West Grinstead	Date	Rudgwick	Henfield	West Grinstead
Sun	5/4/2020	349	722	400	2/8/2020	486	1254	922
Mon	6/4/2020	214	490	177	3/8/2020	255	865	470
Tue	7/4/2020	272	705	262	4/8/2020	281	603	424
Wed	8/4/2020	254	537	296	5/8/2020	240	620	397
Thu	9/4/2020	264	684	322	6/8/2020	236	561	422
Fri	10/4/2020	332	599	373	7/8/2020	224	468	323
Sat	11/4/2020	344	683	428	8/8/2020	226	420	390
Sun	12/4/2020	339	830	382	9/8/2020	461	581	490
Mon	13/04/2020	290	825	254	10/8/2020	199	373	236
Tue	14/04/2020	271	757	282	11/8/2020	225	408	292
Wed	15/04/2020	284	759	329	12/8/2020	246	402	246
Thu	16/04/2020	285	607	333	13/08/2020	124	323	306
Fri	17/04/2020	150	295	94	14/08/2020	196	449	317
Sat	18/04/2020	334	674	337	15/08/2020	261	484	432
Sun	19/04/2020	452	888	518	16/08/2020	309	720	578
Mon	20/04/2020	274	627	229	17/08/2020	167	927	387
Tue	21/04/2020	310	586	277	18/08/2020	188	973	502
Wed	22/04/2020	245	678	223	19/08/2020	75	455	118
Thu	23/04/2020	301	760	329	20/08/2020	277	592	506
Fri	24/04/2020	284	1117	274	21/08/2020	190	427	432

	Date	Rudgwick	Henfield	West Grinstead	Date	Rudgwick	Henfield	West Grinstead
Sat	25/04/2020	419	1567	446	22/08/2020	322	734	679
Sun	26/04/2020	573	859	542	23/08/2020	333	1401	688
Mon	27/04/2020	255	528	293	24/08/2020	210	999	362
Tue	28/04/2020	82	255	79	25/08/2020	105	342	249
Wed	29/04/2020	169	418	140	26/08/2020	230	682	398
Thu	30/04/2020	125	321	89	27/08/2020	210	1116	237
Fri	1/5/2020	232	438	162	28/08/2020	191	366	216
Sat	2/5/2020	439	838	499	29/08/2020	328	668	528
Sun	3/5/2020	356	1533	308	30/08/2020	452	1097	827
Mon	4/5/2020	258	607	233	31/08/2020	346	1125	768
Tue	5/5/2020	228	601	210	1/9/2020	199	520	333
Wed	6/5/2020	304	605	272	2/9/2020	199	485	300
Thu	7/5/2020	303	793	318	3/9/2020	138	386	307
Fri	8/5/2020	502	824	506	4/9/2020	244	437	330
Sat	9/5/2020	513	852	592	5/9/2020	359	761	671
Sun	10/5/2020	341	619	450	6/9/2020	446	775	797
Mon	11/5/2020	155	539	153	7/9/2020	171	381	279
Tue	12/5/2020	312	999	335	8/9/2020	171	445	289
Wed	13/05/2020	207	665	184	9/9/2020	195	708	342
Thu	14/05/2020	251	603	142	10/9/2020	144	1285	299

	Date	Rudgwick	Henfield	West Grinstead	Date	Rudgwick	Henfield	West Grinstead
Fri	15/05/2020	292	703	242	11/9/2020	201	446	247
Sat	16/05/2020	488	828	670	12/9/2020	412	711	581
Sun	17/05/2020	600	999	678	13/09/2020	422	1355	727
Mon	18/05/2020	291	606	133	14/09/2020	179	879	314
Tue	19/05/2020	358	706	120	15/09/2020	198	460	292
Wed	20/05/2020	303	892	254	16/09/2020	149	469	292
Thu	21/05/2020	214	891	184	17/09/2020	133	627	261
Fri	22/05/2020	316	523	256	18/09/2020	187	501	321
Sat	23/05/2020	411	577	361	19/09/2020	370	688	576
Sun	24/05/2020	663	1216	832	20/09/2020	371	1677	665
Mon	25/05/2020	642	1661	884	21/09/2020	145	477	283
Tue	26/05/2020	382	631	409	22/09/2020	154	396	311
Wed	27/05/2020	433	804	434	23/09/2020	74	293	145
Thu	28/05/2020	409	880	390	24/09/2020	49	196	125
Fri	29/05/2020	419	627	309	25/09/2020	93	291	152
Sat	30/05/2020	580	1201	696	26/09/2020	288	583	512
Sun	31/05/2020	504	1403	779	27/09/2020	295	634	459
Mon	1/6/2020	235	4778	219	28/09/2020	156	366	257
Tue	2/6/2020	322	1402	340	29/09/2020	116	418	268
Wed	3/6/2020	206	779	201	30/09/2020	75	172	138

	Date	Rudgwick	Henfield	West Grinstead	Date	Rudgwick	Henfield	West Grinstead
Thu	4/6/2020	230	2952	208	1/10/2020	112	383	227
Fri	5/6/2020	272	804	356	2/10/2020	41	171	72
Sat	6/6/2020	317	714	476	3/10/2020	127	467	200

Table B-1 Daily user counts from three locations on the Downs Link, , November 2022 to March 2023.

Day	Date	Number
Wednesday	17/11/2022	647
Thursday	18/11/2022	554
Friday	19/11/2022	236
Saturday	20/11/2022	302
Sunday	21/11/2022	492
Monday	22/11/2022	911
Tuesday	23/11/2022	247
Wednesday	24/11/2022	249
Thursday	25/11/2022	207
Friday	26/11/2022	246
Saturday	27/11/2022	145
Sunday	28/11/2022	304
Monday	29/11/2022	204
Tuesday	30/11/2022	220
Wednesday	01/12/2022	191
Thursday	02/12/2022	902
Friday	03/12/2022	169
Saturday	04/12/2022	265
Sunday	05/12/2022	245
Monday	06/12/2022	1236
Tuesday	07/12/2022	200
Wednesday	08/12/2022	247
Thursday	09/12/2022	196
Friday	10/12/2022	281

Day	Date	Number
Saturday	11/12/2022	378
Sunday	12/12/2022	256
Monday	13/12/2022	252
Tuesday	14/12/2022	246
Wednesday	15/12/2022	247
Thursday	16/12/2022	272
Friday	17/12/2022	324
Saturday	18/12/2022	320
Sunday	19/12/2022	363
Monday	20/12/2022	228
Tuesday	21/12/2022	449
Wednesday	22/12/2022	305
Thursday	23/12/2022	233
Friday	24/12/2022	285
Saturday	25/12/2022	223
Sunday	26/12/2022	314
Monday	27/12/2022	220
Tuesday	28/12/2021	390
Wednesday	29/12/2021	404
Thursday	30/12/2021	302
Friday	31/12/2021	342
Saturday	01/01/2022	514
Sunday	02/01/2022	440
Monday	03/01/2022	526
Tuesday	04/01/2022	450
Wednesday	05/01/2022	333

Day	Date	Number
Thursday	06/01/2022	1691
Friday	07/01/2022	258
Saturday	08/01/2022	163
Sunday	09/01/2022	1388
Monday	10/01/2022	2160
Tuesday	11/01/2022	296
Wednesday	12/01/2022	386
Thursday	13/01/2022	299
Friday	14/01/2022	266
Saturday	15/01/2022	409
Sunday	16/01/2022	563
Monday	17/01/2022	338
Tuesday	18/01/2022	313
Wednesday	19/01/2022	319
Thursday	20/01/2022	299
Friday	21/01/2022	256
Saturday	22/01/2022	340
Sunday	23/01/2022	430
Monday	24/01/2022	272
Tuesday	25/01/2022	243
Wednesday	26/01/2022	225
Thursday	27/01/2022	331
Friday	28/01/2022	274
Saturday	29/01/2022	422
Sunday	30/01/2022	913
Monday	31/01/2022	263

Day	Date	Number
Tuesday	01/02/2022	272
Wednesday	02/02/2022	346
Thursday	03/02/2022	303
Friday	04/02/2022	203
Saturday	05/02/2022	449
Sunday	06/02/2022	357
Monday	07/02/2022	298
Tuesday	08/02/2022	273
Wednesday	09/02/2022	304
Thursday	10/02/2022	272
Friday	11/02/2022	309
Saturday	12/02/2022	428
Sunday	13/02/2022	254
Monday	14/02/2022	259
Tuesday	15/02/2022	223
Wednesday	16/02/2022	260
Thursday	17/02/2022	358
Friday	18/02/2022	94
Saturday	19/02/2022	217
Sunday	20/02/2022	342
Monday	21/02/2022	307
Tuesday	22/02/2022	323
Wednesday	23/02/2022	307
Thursday	24/02/2022	194
Friday	25/02/2022	337
Saturday	26/02/2022	447

Day	Date	Number
Sunday	27/02/2022	602
Monday	28/02/2022	200
Tuesday	01/03/2022	169
Wednesday	02/03/2022	271
Thursday	03/03/2022	280
Friday	04/03/2022	244
Saturday	05/03/2022	300
Sunday	06/03/2022	458
Monday	07/03/2022	270
Tuesday	08/03/2022	253
Wednesday	09/03/2022	316
Thursday	10/03/2022	279
Friday	11/03/2022	193
Saturday	12/03/2022	489
Sunday	13/03/2022	368
Monday	14/03/2022	266

Page intentionally blank

Rampion 2
WIND FARM