NORTH FALLS

Offshore Wind Farm

# ENVIRONMENTAL STATEMENT

## Chapter 32 Tourism and Recreation

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# Glossary of Acronyms

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| CEA | Cumulative Effects Assessment |
| CMS | Construction Method Statement |
| CRoW | Countryside and Rights of Way |
| DCO | Development Consent Order |
| DECC | Department of Energy and Climate Change |
| DESNZ | Department for Energy Security and Net Zero |
| Defra | Department for Environment, Food and Rural Affairs |
| ECP | England Coast Path |
| EIA | Environmental Impact Assessment |
| ES | Environmental Statement |
| ETG | Expert Topic Group |
| FTE | Full-time Equivalent |
| HDD | Horizontal Directional Drilling |
| HGV | Heavy Goods Vehicle |
| LNR | Local Nature Reserve |
| LV | Light Vehicle |
| MCA | Maritime and Coastguard Agency |
| MHWS | Mean High Water Springs |
| MMO | Marine Management Organisation |
| NCN | National Cycle Network |
| NFOW | North Falls Offshore Wind Farm |
| NNR | National Nature Reserve |
| NPS | National Policy Statement |
| NSIPS | Nationally Significant Infrastructure Projects |
| NRA | Navigational Risk Assessment |
| NSIP | Nationally Significant Infrastructure Project |
| O&M | Operation and Maintenance |
| OCoCP | Outline Code of Construction Practice |
| OCTMP | Outline Construction Traffic Management Plan |

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| OLEMP | Outline Landscape and Ecological Management Plan |
| OLEMS | Outline Landscape and Ecological Management Strategy |
| ONS | Office for National Statistics |
| OPRoWMP | Outline Public Rights of Way Management Plan |
| OSP | Offshore Substation Platform |
| OWF | Offshore Wind Farm |
| PEIR | Preliminary Environmental Information Report |
| PRoW | Public Rights of Way |
| RSPB | Royal Society for the Protection of Birds |
| SAC | Special Area of Conservation |
| SPA | Special Protected Area |
| SSSI | Site of Specific Scientific Interest |
| VEOWL | Five Estuaries Offshore Wind Farm Limited |
| WTG | Wind Turbine Generator |
| ZTV | Zone of Theoretical Visibility |

# Glossary of Terminology

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| The Applicant | North Falls Offshore Wind Farm Limited (NFOW). |
| Array area | The offshore wind farm area, within which the wind turbine generators, array cables, offshore substation platform(s) and/or offshore converter platform will be located. |
| Array cables | Cables which link the wind turbine generators with each other and the offshore substation platform(s). |
| Cable construction compound | Area set aside to facilitate construction of the onshore cable route. Will be located adjacent to the onshore cable route, with access to the highway. |
| Haul road | The track along the onshore cable route used by construction traffic to access different sections of the onshore cable route. |
| Horizontal directional drill (HDD) | Trenchless technique to bring the offshore cables ashore at landfall. The technique will also be used for installation of the onshore export cables at sensitive areas of the onshore cable route. |
| Jointing bay | Underground structures constructed at regular intervals along the onshore cable route to join sections of cable and facilitate installation of the cables into the buried ducts. |
| King Charles III England Coast Path (ECP) | The King Charles III England Coast Path will be the longest managed coastal path in the world. It will go all the way around the coast of England and will be around 2,700 miles long when it is complete. The trail is opening in sections. An opening celebration for the King Charles III Coast Path was held in Great Yarmouth in September 2023. In the East, the following sections are open to the public (as of July 2022): Tilbury to Southend-on-Sea, Southend-on-Sea to Wallasea Island, Maldon to Salcott, Hopton-on-Sea to Sea Palling and Sea Palling to Weybourne. The government announced in February 2022 that the King Charles III England Coast Path will be fully walkable by the end of 2024. |
| Landfall | The location where the offshore export cables come ashore at Kirby Brook. |
| Landfall compound | Compound at landfall within which horizontal directional drill (HDD) or other trenchless technique would take place. |
| Link boxes | Underground chambers or above ground cabinets next to the onshore export cables housing low voltage electrical earthing links. |
| National Landscape | In 2023 Natural England rebranded Areas of Outstanding National Beauty and National Landscapes. |
| Offshore cable corridor | The corridor of seabed from array area to the landfall within which the offshore export cables will be located. |
| Offshore converter platform | Should an offshore connection to an HVDC interconnector cable be selected, an offshore converter platform would be required. This is a fixed structure located within the array area, containing HVAC and HVDC electrical equipment to aggregate the power from the wind turbine generators, increase the voltage to a more suitable level for export and convert the HVAC power generated by the wind turbine generators into HVDC power for export to shore via an HVDC interconnector cable.<br><br>It should be noted that the offshore converter platform does not form part of this DCO application. |

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| Offshore export cables | The cables which bring electricity from the offshore substation platform(s) to the landfall. |
| Offshore project area | The overall area of the array area and the offshore cable corridor. |
| Offshore substation platform(s) | Fixed structure(s) located within the array area, containing HVAC electrical equipment to aggregate the power from the wind turbine generators and increase the voltage to a more suitable level for export to shore via offshore export cables. |
| Onshore cable route | Onshore route within which the onshore export cables and associated infrastructure would be located. |
| Onshore export cables | The cables which take the electricity from landfall to the onshore substation. These comprise High Voltage Alternative Current (HVAC) cables and auxiliary cables, buried underground. |
| Onshore project area | The boundary in which all onshore infrastructure required for the Project will be located (i.e. landfall; onshore cable route, accesses, construction compounds; onshore substation and National Grid substation extension). |
| Onshore scoping area | The boundary in which all onshore infrastructure required for the Project will be located, as considered within the North Falls EIA Scoping Report. |
| Onshore substation | A compound containing electrical equipment required to transform and stabilise electricity generated by the Project so that it can be connected to the National Grid. |
| Onshore substation construction compound | Area set aside to facilitate construction of the onshore substation. Will be located adjacent to the onshore substation (location not yet defined). |
| Onshore substation works area | Area within which all temporary and permanent works associated within the onshore substation are located, including onshore substation, construction compound, access, landscaping, drainage and earthworks. |
| The Project or ‘North Falls’ | North Falls Offshore Wind Farm, including all onshore and offshore infrastructure. |
| Safety zones | A marine zone outlined for the purposes of safety around a possibly hazardous installation or works / construction area |
| Scour protection | Protective materials to avoid sediment being eroded away from the base of the wind turbine generator foundations and offshore substation platform foundations as a result of the flow of water. |
| Transition joint bay | Underground structures that house the joints between the offshore export cables and the onshore export cables. |
| Trenchless crossing compound | Areas within the cable corridor which will house trenchless crossing (e.g. HDD) entry or exit points. |
| Wind turbine generator (WTG) | Power generating device that is driven by the kinetic energy of the wind. |

# 32 Tourism and Recreation

## 32.1 Introduction

1. This chapter of the Environmental Statement (ES) considers the likely significant effects of the North Falls Offshore Wind Farm (hereafter 'North Falls' or 'the Project') on tourism and recreation. The chapter provides an overview of the existing tourism and recreational assets within the onshore and offshore project areas, followed by an assessment of the likely significant effects on these assets for the construction, operation, maintenance, and decommissioning phases of the Project. The overall assessment of effects on visitor volume and value is provided in ES Chapter 31 Socio-economics (Document Reference: 3.1.33).
2. This chapter has been written by Hatch. The assessment is undertaken with specific reference to the relevant legislation and guidance, of which the principal policy documents with respect to Nationally Significant Infrastructure Projects (NSIPs) are the National Policy Statements (NPS). Details of these and the methodology used for the Environmental Impact Assessment (EIA) and Cumulative Effects Assessment (CEA) are presented in Section 32.4.
3. Tourism and recreational activities are dependent upon people choosing to visit or return to an area. Such choices could be influenced by changes in the landscape, physical disturbances such as noise or vibration, obstructions to access routes and destinations, and the availability of accommodation. Due to the close association between tourism and recreation and other environmental topics, this chapter should be read in conjunction with the following linked chapters (Volume 3.1):
    - ES Chapter 3 Policy Legislative Context (Document Reference: 3.1.5);
    - ES Chapter 9 Marine Water and Sediment Quality (Document Reference: 3.1.11);
    - ES Chapter 15 Shipping and Navigation (Document Reference: 3.1.17);
    - ES Chapter 20 Air Quality (Document Reference: 3.1.22);
    - ES Chapter 26 Noise and Vibration (Document Reference: 3.1.28);
    - ES Chapter 27 Traffic and Transport (Document Reference: 3.1.29);
    - ES Chapter 28 Human Health (Document Reference: 3.1.30);
    - ES Chapter 29 Offshore Seascape, Landscape and Visual Impact Assessment (Document Reference: 3.1.31);
    - ES Chapter 30 Landscape and Visual Impact Assessment (Document Reference: 3.1.32); and
    - ES Chapter 31 Socio-economics (Document Reference: 3.1.33)

## 32.2 Consultation

4. Consultation with regards to tourism and recreation has been undertaken in line with the general process described in ES Chapter 6 Environmental Impact

Assesment (EIA) Methodology (Document Reference: 3.1.8). The key elements included scoping, technical consultation via the PEIR and the technical consultation via two Expert Topic Groups (ETGs) meetings. ES Chapter 7 Technical Consultation (Document Reference: 3.1.9) gives further details on ETGs structures and attendees. Feedback received has been considered in preparing the ES chapter.

5. North Falls Offshore Wind Farm Limited (NFOW) (hereafter 'the Applicant') submitted a Scoping Report and requested a Scoping Opinion about the Project to the Planning Inspectorate (on behalf of the Secretary of State) in July 2021. A Scoping Opinion was issued in August 2021.

6. Table 32.1 provides a summary of comments relevant to tourism and recreation as received from the Planning Inspectorate, PEIR consultation and ETGs and identifies the section(s) in which each of these comments is addressed.

7. This chapter has been updated following the consultation on the PEIR in order to produce the final assessment. Full details of the consultation process are presented in the Consultation Report (Document Reference: 4.1).

**Table 32.1 Consultation responses**

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
|---|---|---|---|
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Section 4.2.3- Potential impacts<br><br>In addition to the potential for impacts in terms of hotel facilities and holiday rental accommodation (addressed within Scoping Report section 4.3 Tourism and Recreation), the ES should include an assessment of impacts to standard rental accommodation during the construction period where significant effects are likely to occur. For example, consideration of potential impacts to availability of affordable housing. | Impacts to standard rental accommodation availability during the construction phase are considered in Section 32.6.<br><br>Pressure on local onshore housing infrastructure is assessed within ES Chapter 31 Socio-economics (Document Reference: 3.1.33). |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Mitigation – Timing of Works<br><br>The ES should also consider the potential of the Proposed Development to disrupt fishing and recreational activities (including restriction of access) during both the construction and operation phases and any likely significant effects should be reported within the relevant assessments of the ES (e.g., 'Socio-economics' and 'Tourism and recreation'). | Impacts to fishing and recreational activities associated with fisheries during the construction and operation phases are considered in Section 32.6.<br><br>Wider economic effects from disruption to shipping are assessed within ES Chapter 31 Socio-economics (Document Reference: 3.1.33). |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Inter relationships<br><br>The Scoping Report identifies potential impacts to military and civil aviation, including through physical components of the Proposed Development limiting access and on radar systems. The potential for inter relationships with other aspects e.g., infrastructure and other users, tourism and socioeconomics, should also be assessed in the ES if a significant effect is likely. | No significant residual effects are identified in ES Chapter 17 Aviation and Radar (Document Reference: 3.1.19). Thus, there is no pathway for inter-relationships with tourism and recreation and this is scoped out of further assessment.<br><br>Inter relationships with other aspects are considered in their respective ES chapters. |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Table 4.5 - Restricted beach access - operation<br><br>On the basis that there would be no requirement to restrict beach access at the landfall areas during operation of the Proposed Development, and that access would be fully restored on | Noted by the Applicant. |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
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| | | completion of construction, the Inspectorate agrees that this matter can be scoped out of the ES. | |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Table 4.5- Deterioration to bathing water quality – operation<br><br>On the basis that there is potential for impacts to marine water quality in bathing waters located in proximity to the landfall search area, and limited information has been presented about how these impacts would be managed, the Inspectorate does not have sufficient information on which to conclude that significant effects are not likely to occur and this matter cannot therefore be scoped out of the ES. | Impacts to marine water quality in bathing waters located in proximity to the landfall compound during the operation phase of the Project are considered in Section 32.6.<br><br>No significant residual effects related to the deterioration of marine bathing water quality during the operation phase are identified in ES Chapter 9 Marine Water and Sediment Quality (Document Reference: 3.1.11). |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Table 4.5- Loss of and disturbance to onshore local tourism and recreation assets – operation<br><br>On the basis that no onshore local tourism and recreation assets will be lost as a result of the Proposed Development, and that activities during operation are likely to involve small numbers of transport movements that would not result in a large change to the baseline highway conditions, the Inspectorate agrees that this matter can be scoped out of the ES. | Noted by the Applicant. |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Table 4.5 Disturbance to onshore recreation / tourism from noise, dust and visual impact – operation<br><br>On the basis that activities during operation are likely to be localised and limited in terms of air quality emissions, the Inspectorate agrees that they are not likely to give rise to significant effects to tourism and this matter can be scoped out of the ES. | Noted by the Applicant. |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Table 4.5 - Disturbance to onshore recreation / tourism from noise, dust and visual impact – operation<br><br>The Inspectorate notes that the noise and visual impacts during operation of the Proposed Development are scoped into the | Noise and visual impacts on onshore tourism and recreation during the operation phase are considered in Section 32.6. |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
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| | | respective aspect sections of the ES. The Inspectorate considers that the economic impact and associated effects of these matters should also form part of the assessment, where significant effects are likely to occur. | No significant residual effects related to operational noise are identified in ES Chapter 26 Noise and Vibration (Document Reference: 3.1.28). |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Section 4.3.1- Existing environment – coastal / marine tourism and recreation / inland tourism and recreation<br>Figure 4.3 [of the scoping report] shows the recreational features and tourism facilities present within the Onshore Scoping Area.<br>The ES should list / present all potential receptors present within the selected on and offshore study areas, including the inshore study area as discussed at paragraph 766. | The existing environment, as described in Section 32.5, considers potential receptors within the onshore and offshore study areas. |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Section 4.3.2- Approach to data collection<br>The ES should demonstrate that data collection has involved consultation with local and regional commercial tourist and recreation interests and other relevant consultation bodies where necessary and show how this has informed the onshore and offshore assessment.<br>The Applicant should refer to Essex County Council's Highway's Information Map to identify relevant Public Rights of Way (PRoWs) and National Cycle Networks (NCNs). | The assessment methodology, as described in Section 32.4, demonstrates the data sources that have been used, as informed by stakeholder consultation.<br>Essex County Council's Highway Information Map is included as a data source. |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Sections 4.3.1 to 4.3.3- Potential impacts to coastal and marine / inland (onshore) receptors during construction, operation and maintenance, and decommissioning<br>The Scoping Report states that offshore and landfall construction activities and associated Safety Zones may disrupt marine and coastal recreational activities, and these will need to be identified and assessed. This should be done in consultation with relevant consultation bodies and the ES should demonstrate how any | Impacts on coastal and marine tourism and recreational activities are considered in Section 32.6.<br>ES Chapter 15 Shipping and Navigation (Document Reference: 3.1.17) outlines the consultation that will be undertaken regarding the impacts on navigation, including recreational users, and the need for Safety Zones. |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
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| | | disruption will be managed and what the likely effects are anticipated and whether any of these are likely to be significant. The risk of collision with structures and reduced navigable area as a result of the construction activity will be assessed and is discussed in section 2.10.<br><br>The assessment of safety with respect to tourism and recreation should be consulted on with relevant consultation bodies, such as the Maritime and Coastguard Agency, and the ES should demonstrate how this consultation has informed the assessment including the identification of any likely significant effects and any mitigation required. | |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Section 4.3.3.4 - Potential cumulative impacts<br><br>The ES should include an assessment of cumulative impacts to tourism and recreation receptors that use the onshore, coastal and marine environments, not just the onshore receptors. | Cumulative effects to tourism and recreation receptors within the onshore, coastal, and marine environments are considered in Section 32.8. |
| Planning Inspectorate | 26/08/2021/ Scoping Opinion | Section 4.3.4 – Approach to assessment<br><br>The Scoping Report states that there are no specific statutory guidelines which inform the assessment of impacts on tourism and recreation receptors. The assessment will focus on the factors that have the potential to reduce the number of tourists visiting or returning to an area.<br><br>The ES should demonstrate how professional judgement has been used in any assessment and how conclusions have been reached. | The assessment methodology, as described in Section 32.4, describes how professional judgement has been applied. |
| Natural England | 16/08/2021/ Scoping Opinion | Annex Section 1.6.3 We welcome consideration of Public Rights of Way (PRoW). We would expect consideration for techniques for crossing the Coast Path and Public Right of Way (PRoW) to be included in the EIA. Further detail on crossing PRoWs including details of suitable techniques to be included in the ES. | Impacts associated with the diversion and temporary closure of PRoW are considered in Section 32.6.<br><br>The Outline PRoW Management Plan (OPRoWMP) (Document Reference: 7.17) and ES Appendix 5.1 Crossing Schedule (Document Reference: 3.3.2) provides further details on |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
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| | | | crossings, diversions and temporary closure as well as onshore construction techniques. |
| Essex County Council | 20/08/2021/ Scoping Opinion | Any Public Rights of Way (PRoW) through or surrounding the site should remain usable, retain their recreational amenity, character, and be integrated as part of the development proposal.<br><br>Applicants will need to demonstrate to the Highway Authority that all PRoW impacted upon by a development will remain accessible by the general public and the public's rights and ease of passage over public footpaths / bridleways / byways should be maintained free and unobstructed at all times to ensure the continued safe passage of the public on the definitive right of way. | Impacts associated with the diversion and temporary of PRoW are considered in Section 32.6.<br><br>The OPRoWMP and the Crossing Schedule provides further details on crossings, diversions and temporary closure as well as onshore construction techniques. |
| Essex County Council | 20/08/2021/ Scoping Opinion | Section 10.1 Accordingly, any damage to the area's attractiveness for visitors would impact negatively on the food and drink sectors, and the brand and reputation of the District and would be considered an unacceptable risk. Further work is required to identify and assess how any impact on the tourism economy will be managed and mitigated. | Noted by the Applicant. A literature review describing the relationship between offshore wind farm (OWF) developments, and the local tourism economy has been provided in Section 32.5.6.<br><br>Wider economic effects on tourism volume and value are assessed within Section 32.6. This also considers the potential for long term effects associated with changes to people's perceptions of the area as a tourist destination. |
| Essex County Council | 20/08/2021/ Scoping Opinion | Section 10.2<br><br>Any short term disruptions to this accommodation supply would have lasting effects on repeat visitor numbers. It is vital that this increased demand on certain types of accommodation during the peak construction period does not negatively impact on the visitor numbers and will need to be managed during the construction and operation phases. The Joint Councils seek the provision of legacy benefits through the provision of new and improved existing | Impacts on tourism associated with the reduction in available accommodation due to construction personnel during the construction and operation phases of the Project are considered in Section 32.6. The socio-economic impacts of increased demand on housing are assessed in ES Chapter 31 Socio-economics (Document Reference: 3.1.33). |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
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| | | accommodation alongside create new, sustainable, quality visitor accommodation. | |
| Suffolk County Council / Essex County Council | 08/07/2021/ Seascape, Landscape and Visual Impact, Land Use, Health, Socio Economics and Tourism and Recreation Expert Topic Group | When looking at long and short list for cumulative effects, the Project should not just focus on energy projects but also look at the overlapping civils projects (e.g. proposed garden communities, transport links) | Screening of a range of project types is provided in Section 32.8.2 of the CEA. |
| Suffolk County Council | 08/07/2021/ Seascape, Landscape and Visual Impact, Land Use, Health, Socio Economics and Tourism and Recreation Expert Topic Group | With all the Projects planned in the region, it was important to understand the impacts on tourism and recreation, particularly for day trippers who may perceive East Anglia to be a construction site for energy projects for the next 10 years. | A literature review of public perceptions of OWFs and their impacts on tourism and recreation has been provided as part of the baseline in Section 32.4.6. Perception-related impacts are also assessed in Section 32.6. |
| Natural England | 14/07/2023 / PEIR Consultation Response Letter and | There are possible implications for users of King Charles III England Coast Path depending on timing of opening of England Coast Path.<br>We advise due regard to scheme design and timings of project works are given to avoid impacts as far as practicable to coastal | The King Charles III England Coast Path is noted as part of the existing environment in Section 32.5 and is considered in the assessment within Section 32.6 and Section 32.11. The assessment assumes that the King Charles III England Coast Path will be open by the time onshore construction works begin. |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
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| | 19/09/2023 / Expert Topic Group (ETG) | access. England Coast Path is likely to be open this area by summer 2025 at the earliest. | |
| Tendring District Council | 14/07/2023 / PEIR Consultation Response Letter and<br>19/09/2023 / ETG | At present Tourism is a major part of the Tendring economy. As such we would expect to see a full outline of how the impacts on tourism will be mitigated. The Council has concerns that the disturbance not only to the coast and the wider countryside, particularly in the construction phase, will be significant. The tourism industry relies on good trade and repeat custom achieved during a relatively short window of opportunity in the summer months and the works proposed as part of this project will have a substantial impact.<br>TDC expect this to be monitored and further work carried out as necessary, as sites at landfall are popular destinations. The cumulative impacts of the entire project on the transport infrastructure, in particular any challenges around heavy plant traffic impact across the proposed routes at busy times of the year. Seasonal increases as a result of tourism will need to be looked at extremely carefully and mitigated as required. | The existing environment, as described in Section 32.5, notes the volume and value of the tourism economy. Section 32.5 also considers the specific characteristics of the local areas most affected by construction works and the embedded mitigation measures proposed within other inter-related topic chapters which may reduce impacts on visitors (noise, traffic and transport etc).<br>Knock on effects on tourism which occur because of effects on transport infrastructure are considered within Section 32.6.<br>The worst case approach outlined in Section 32.3.2 considers how the timing of construction activity will relate to the peak tourist season traffic levels and key routes to visitor assets.<br>Potential monitoring requirements are set out in Section 32.7. |
| Tendring District Council | 14/07/2023 / PEIR Consultation Response Letter and<br>19/09/2023 / ETG | Stones Green Road off the B1035 is part of the National Sustrans Cycle Network<br>The Council requests footpaths are kept open with diversions if needed. | All diverted footpaths will be kept open with diversions. Further details of how footpaths will be managed are set out in the OPRoWMP. |
| Suffolk County Council | 14/07/2023 / PEIR Consultation | 8.1 Whilst onshore works are proposed to be located in Essex, there is still the potential for onshore works to impact Suffolk. The visual impacts of the offshore elements are reflected through a | The potential for onshore works to impact on Suffolk are assessed in Section 32.6. This includes an assessment of impacts on accommodation in Suffolk. |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
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| | Response Letter and<br>19/09/2023 / ETG | permanent impact upon tourism on the visitor economy within Suffolk. | |
| Suffolk County Council | 14/07/2023 / PEIR Consultation Response Letter and<br>19/09/2023 / ETG | 8.2 The County Council believes that it is vital that projects fully and appropriately consider the character, function and sensitivity of the natural and historic environment and landscape of Suffolk and its importance to a thriving tourism sector. | The existing environment, as described in Section 32.5, sets out the natural and historic environment and landscape within Suffolk and its importance of this to the tourism sector. It also provides data on the value and volume of tourism. This is considered within the assessment in Section 32.6 and the assessment of wider economic effects detailed in ES Chapter 31 Socio-economics (Document Reference: 3.1.33). |
| Suffolk County Council | 14/07/2023 / PEIR Consultation Response Letter and<br>19/09/2023 / ETG | 8.3 Suffolk offers a rich and varied tourist offer known for its heritage assets and landscape designations, such as, the Suffolk Coast and Heath AONB (now National Landscape) and Heritage Coast. The County Council expects the applicant to fully assess and evidence direct and indirect impacts on designations. This includes the extent to which the physical infrastructure would detract from the environmental quality for recreation and quantifying the impact of construction on tourism assets and visitor numbers. More broadly, it is also imperative that the project considers its part in the cumulative impact on the perception and propensity of people to visit the area. | Section 32.6 assesses impacts on tourism on the basis of the available literature, the nature of the local visitor offer and the characteristics of visitors and the experiences from other offshore wind projects.<br>It should be noted that the Project has been refined since the PEIR submission. Section 32.3.2 notes how the Project design has changed. Importantly this substantially reduces the visual impact and therefore potential for impact on tourism along the Suffolk Coast. |
| Tendring District Council | 14/07/2023 / PEIR Consultation Response Letter and | At present Tourism is a major part of the Tendring economy. As such we would expect to see a full outline of how the impacts on tourism will be mitigated. The Council has concerns that the disturbance not only to the coast and the wider countryside, particularly in the construction phase, will be significant. The tourism industry relies on good trade and repeat custom achieved during a relatively short window of opportunity in the summer | The existing environment, as described in Section 32.5, notes the volume and value of the tourism economy. Section 32.5 also considers the specific characteristics of the local areas most affected by construction works and the embedded mitigation measures proposed within other inter-related topic chapters which may reduce impacts on visitors (noise, traffic and transport etc). |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
|---|---|---|---|
| | 19/09/2023 / ETG | months and the works proposed as part of this project will have a substantial impact.<br><br>TDC expect this to be monitored and further work carried out as necessary, as sites at landfall are popular destinations. The cumulative impacts of the entire project on the transport infrastructure, in particular any challenges around heavy plant traffic impact across the proposed routes at busy times of the year. Seasonal increases as a result of tourism will need to be looked at extremely carefully and mitigated as required. | Knock on effects on tourism which occur because of effects on transport infrastructure are considered within Section 32.6.<br><br>The worst case approach outlined in Section 32.3.2 considers how the timing of construction activity will relate to the peak tourist season traffic levels and key routes to visitor assets.<br><br>Potential monitoring requirements are set out in Section 32.7. |
| Tendring District Council | 14/07/2023 / PEIR Consultation Response Letter and<br><br>19/09/2023 / ETG | Stones Green Road off the B1035 is part of the National Sustrans Cycle Network<br>The Council requests footpaths are kept open with diversions if needed. | All diverted footpaths will be kept open with diversions. Further details of how footpaths will be managed are set out in the OPRoWMP. |
| Suffolk County Council | 14/07/2023 / PEIR Consultation Response Letter and<br><br>19/09/2023 / ETG | 8.1 Whilst onshore works are proposed to be located in Essex, there is still the potential for onshore works to impact Suffolk. The visual impacts of the offshore elements are reflected through a permanent impact upon tourism on the visitor economy within Suffolk. | The potential for onshore works to impact on Suffolk are assessed in Section 32.6. This includes an assessment of impacts on accommodation in Suffolk. |
| Suffolk County Council | 14/07/2023 / PEIR Consultation Response Letter and | 8.2 The County Council believes that it is vital that projects fully and appropriately consider the character, function and sensitivity of the natural and historic environment and landscape of Suffolk and its importance to a thriving tourism sector. | The existing environment, as described in Section 32.5, sets out the natural and historic environment and landscape within Suffolk and its importance of this to the tourism sector. It also provides data on the value and volume of tourism. This is considered within the assessment in Section 32.6 and the |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
|---|---|---|---|
| | 19/09/2023 / ETG | | assessment of wider economic effects detailed in ES Chapter 31 Socio-economics (Document Reference: 3.1.33). |
| Suffolk County Council | 14/07/2023 / PEIR Consultation Response Letter and<br>19/09/2023 / ETG | 8.4 Of particular concern are the implications for the Suffolk coast as a visitor destination, and the consequences for the local tourism economy. The impacts on the landscape of the Suffolk Coast and Heaths AONB (now National Landscape) and the related seascape by reason of the potential height of the offshore elements are already discussed in the Seascape and Landscape section. These impacts have the potential to affect the attractiveness of the area to visitors as well as for local communities. | As above. |
| Suffolk County Council | 14/07/2023 / PEIR Consultation Response Letter and<br>19/09/2023 / ETG | 8.5 The County Council is also seeking to ensure that addressing the accommodation needs of construction workers and other non-home-based workers is not detrimental but beneficial to the visitor economy. This could be achieved by aiming for the project related accommodation needs to be complementing the main tourist season (and Autumn/Winter weekend breaks) rather than causing disruption. For example, depending on the timing of the construction work, it could be possible for accommodation to be used in the shoulder months. | Section 32.6 considers the reduction in tourist accommodation availability. |
| Essex County Council | PEIR Consultation Response Letter 14/07/2023 and ETG 19/09/2023 | Tourism is a major part of the Tendring District economy providing a wide and diverse range of tourism opportunities as it makes the most of its rural seaside location which is well connected to the wider region by means of a variety of transport modes. Options include hotels, guest houses, holiday parks, camping and caravanning, attracting significant number of visitors if all age ranges in a variety of settings. | The existing environment, as described in Section 32.5, notes the volume and value of the tourism economy in Tendring as the character and offer of tourism in the district. This includes a baseline assessment of visitor accommodation. |
| Essex County Council | 14/07/2023 / PEIR Consultation | One of Tendring's stated Local Plan priorities is as at Policy PP9 to PP 11 in the Adopted Tendring Local Plan and Objective 10 within the same "to work with partners to provide an enhanced | Policies PP 9 to PP 11 are considered within Section 32.4.1.2. |

| Consultee | Date / Document | Comment | Response / where addressed in the ES |
|---|---|---|---|
| | Response Letter and<br>19/09/2023 / ETG | environment for tourism and the maritime sector and its associated services." | |
| Essex County Council | 14/07/2023 / PEIR Consultation Response Letter and<br>19/09/2023 / ETG | The Cultural, Visitor and Tourism sector encompasses a range of activities which play an important role in the District's economy. This sector is worth more than £353 million per annum to the economy and is estimated to provide 7,900 jobs across Tendring District. The majority of jobs and businesses in this sector are located in and around Clacton. Figures from the Economic Strategy 2019 show that tourism employment has grown by 35% over the last five years. | The existing environment, as described in Section 32.5, notes the volume and value of the tourism economy in Tendring, drawing on more recent data than is cited in the comment. |
| Essex County Council | 14/07/2023 / PEIR Consultation Response Letter and<br>19/09/2023 / ETG | It should be noted that the rented accommodation assumed to be available has not been detailed. As an observation, any long-term occupation of accommodation which is currently used by the Tourist trade may not be acceptable in terms of local policy if it were to use accommodation on 'safeguarded sites' as these are protected from alternative use that could materially harm the provision of tourist accommodation in the district. There is also no guarantee that this will be available, currently there are significant numbers of asylum seekers housed in hotels in both Colchester and Ipswich meaning that this accommodation is not available. Accommodation for workers will therefore need to be considered in more detail. | ES Chapter 31 Socio-economics (Document Reference: 3.1.33) analyses the availability of a range of residential accommodation types, including private rented and owner occupied. This focuses on availability within a 45 minute drive time of the development site, more detail on the study area is provided within Section 32.3.1.<br>Following the ETG Essex County Council confirmed that 'safeguarded sites' should be substituted with 'retained sites' and noted Policy PP 9 of Tendring District Local Plan. This has been considered within Section 32.4.1.2.<br>It should be noted that the demand for accommodation resulting from North Falls will be modest, and it is expected that there will be sufficient capacity in visitor accommodation, even in peak periods. |

## 32.3 Scope

### 32.3.1 Study area

#### *32.3.1.1 Marine and coastal study area*

8. The worst case extent for potential impacts on marine and coastal tourism and recreation for North Falls is associated with visual impacts as a result of the North Falls offshore infrastructure. The marine and coastal study area has therefore been defined based on the areas where potential significant visual effects are identified in ES Chapter 29 Offshore Seascape, Landscape and Visual Impact Assessment (Document Reference: 3.1.31) (see ES Figure 29.1.1 (Document Reference: 3.2.25)). The following areas are included in the marine and coastal tourism and recreation study area:

   - East Suffolk coast and offshore waters; and
   - Essex coast and offshore waters.

#### *32.3.1.2 Onshore study area*

9. The assessment of North Falls' impact on onshore tourism and recreation has primarily focused on the onshore project area, including the area around landfall between Clacton-on-Sea and Frinton-on-Sea, through to the onshore substation works area near Little Bromley (north west of the A120). For the purposes of this assessment, the local area of influence has been generally taken to be a 500m buffer each side of the onshore project area. This is then put into the context of tourism and recreation throughout the Tendring Peninsula and wider Essex region. The onshore study area is shown in ES Figure 32.1 (Document Reference: 3.2.28).

#### *32.3.1.3 Travel to work zone*

10. Based on professional judgement and experience of other OWF, it is expected that non-resident workers would be prepared to travel up to 45 minutes to reach construction sites. This is based on experience of other OWFs and major construction projects. Therefore Tendring District, Colchester Borough, Maldon District, and Braintree District in the county of Essex and Ipswich Borough, Babergh District, and East Suffolk District in the county of Suffolk are considered for impacts related to non-resident workers accommodation.

### 32.3.2 Realistic worst case scenario

11. The final design of North Falls will be confirmed through detailed engineering design studies that will be undertaken post-consent. In order to provide a precautionary but robust impact assessment at this stage of the development process, realistic worst case scenarios have been defined in terms of the likely significant effects that may arise. This approach to EIA, referred to as the Rochdale Envelope, is common practice for developments of this nature, as set out in Planning Inspectorate Advice Note Nine (2018). The Rochdale Envelope for a project outlines the realistic worst case scenario for each individual impact, so that it can be safely assumed that all other scenarios within the design envelope will have less impact. Further details are provided in ES Chapter 6 EIA Methodology (Document Reference: 3.1.8).

12. The realistic worst case scenarios for the likely significant effects scoped into the EIA for the tourism and recreation assessment are summarised in Table 32.2. These are based on North Falls parameters described in ES Chapter 5 Project Description (Document Reference: 3.1.7), which provides further details regarding specific activities and their durations.

13. The main grid connection options considered in the ES are outlined below:

- Option 1: Onshore electrical connection at a national grid connection point within the Tendring peninsula of Essex, with a project alone onshore cable route and onshore substation infrastructure;
- Option 2: Onshore electrical connection at a national grid connection point within the Tendring peninsula of Essex, sharing an onshore cable route and onshore duct installation (but with separate onshore export cables) and co-locating separate project onshore substation infrastructure with Five Estuaries Offshore Wind Farm ('Five Estuaries'); or
- Option 3: Offshore electrical connection, supplied by a third party.

14. Grid connection Option 2 is considered the realistic worst case scenario for the tourism and recreation assessment because the build out requires four sets of cable ducts and associated joint bays to be installed, impacting upon the largest footprint of the three grid connection options.

15. Under Option 2, the Project's onshore infrastructure comprises the following elements:

- Landfall, where the offshore export cables are brought ashore;
- Onshore cable route, which includes space for temporary works for the installation of cable ducts and buried onshore export cables, including areas for temporary construction compounds (TCCs), construction and operation and maintenance accesses (including Bentley Road improvement works);
- Onshore substation, proposed to be located west of Little Bromley;
- Onshore substation works area, which includes land required for temporary construction, export cables, means of access, drainage, landscaping and environmental mitigation for the onshore substation;
- The search area for the East Anglia Connection Node (EACN) (the Project's National Grid connection point), within which will be located the Project's National Grid substation connection works.

16. Collectively, the footprint of the Project's onshore infrastructure is referred to herein as the 'onshore project area' and is shown on Figure 5.2 (Document Reference: 3.2.3). The Project's onshore infrastructure outlined above is proposed to be located entirely within the Tendring peninsula of Essex.

**Table 32.2 Realistic worst case scenarios – potential impacts arising from development of North Falls alone - build out Option 2**

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| **Construction** | | |
| Impacts relating to offshore infrastructure | 34 wind turbine generators (WTGs) with a Maximum rotor tip height of 377.4m above Mean High Water Springs (MHWS), or<br>57 WTGs with a maximum blade tip height of 276.4m above MHWS.<br>2 offshore substation platforms (OSP),<br>190km of array cable with up to 20% (38km) of the cable length requiring surface laid cable protection;<br>Offshore cable corridor length 57km<br>125.4km of export cable with up to 10% (12.5km) of the cable length requiring surface laid cable protection.<br>Safety zones around potentially hazardous installation or works / construction area will be identified as required by the shipping and navigation assessment (ES Chapter 15 Shipping and Navigation (Document Reference: 3.1.17).<br>An estimated 15 clearance operations are predicted during preparation for construction (9 in the array area and 6 in the offshore cable corridor).<br>Offshore construction duration: The indicative offshore construction programme is for offshore construction to begin in Q2 of year 4 of the overall construction programme. with wind turbine generation completed in Q3 of year 5 and commissioning in Q4 of year 5.<br>Maximum vessels on site: 35<br>Vessel movements throughout construction phase: 2,532 | The largest turbines represent the reasonable worst case scenario for the range of visual impacts which have informed the marine and coastal study area. However, the higher number of turbines represent the reasonable worst case scenario in terms of shipping and navigation impacts and therefore the consequences of both are considered in relation to impacts on tourism and recreation. |
| Impacts relating to landfall | Landfall HDD (temporary works) physical parameters:<br>• Maximum No. of Transition Joint Bays (TJB) = 2<br>• Individual TJB dimensions / permanent landtake = 4 x 15m | Duration includes compound establishment, HDD, transition bays, and reinstatement. |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| | • Maximum indicative HDD spacing onshore = 40m<br>• Maximum HDD depth = 20m<br>• Maximum indicative length of HDD = 1.1 km<br>• Landfall construction compound dimensions = 75 x 150m<br>• Drill exit location = subtidal exit below mean low water springs (up to 8m depth) | |
| | Duration:<br>• 13 months (of which HDD = 6 months)<br>• HDD to include 24 hour / 7 days working where required | |
| | Landfall directly interacts with the following PRoW and other onshore recreation receptors:<br>• 4 PRoW;<br>• 1 NCN;<br>• 2 historical trails; and<br>• the King Charles III England Coast Path (ECP). | |
| Impacts relating to the onshore cable route | Cable route construction physical parameters:<br>• Route length = up to 24km<br>• Jointing bays = Up to 192 (approximately every 500m) buried below ground<br>• Joint bay dimensions = 4 x 15m<br>• Cable trench dimensions = 3.75 – 1.2 x 2m (tapered top to bottom)<br>• Maximum cable trench depth = 2m<br>• Minimum cable burial depth (to top of protection tile) = 0.9m | Overall duration includes establishing / reinstating temporary construction compounds (TCCs) and haul roads, cable installation (trench excavation, duct installation, cable jointing), trenchless techniques (includes compound establishment, HDD, and reinstatement). |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| | • Indicative cable route width = 72m (open cut trenching), 90m (trenchless crossings), 130m (complex trenchless crossings)<br>• Cable construction compound dimensions = 150 x 150m (main) to 100m x 100m (satellite)<br>• No. of trenches = 4<br>• Cable trench dimensions = 3.5 – 1.2 x 2m (tapered top to bottom)<br>• Haul road width = 6m wide road, 10m wide total including verges, drainage and passing places.<br>• Haul road spacing at passing places = 500m<br>• Hedge replanting restrictions = shrubs max 5m high within 6m of each cable centre. | |
| | Trenchless crossings physical parameters:<br>• Maximum width of buried cable = 130m - The cable route has been designed for a typical width of up to 72m in areas where open cut trenching is the proposed construction method, 90m where trenches techniques are proposed and up to 130m in areas where the trenchless crossing is particularly complex.<br>• Maximum trenchless crossing depth = 20m<br>• HDD compound dimensions = 75 x 150m | |
| | Durations:<br>• Bentley road improvement works = 6 - 9 months<br>• Cable route works = 18 – 27 months<br>• Cable installation = 12 months<br>• Major HDD (each location) = 8 months (of which HDD = 4 months) | |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| | • Minor HDD crossings = 2 months<br>Major HDD crossings to include 24 hour / 7 days working where required. | |
| | Interactions with PRoW and other onshore recreation infrastructure:<br>• 26 interactions with PRoW;<br>• Two historical trails;<br>• King Charles III ECP; and<br>• One interaction with an NCN route. | |
| Impacts relating to the onshore substation | Onshore substation (temporary works) physical parameters:<br>• Indicative area of the AIS substation = 280 x 210m<br>• Number of buildings = 6<br>• External equipment height = 18m<br>• Construction compound footprint = 250 x 150m<br>National Grid substation connection works physical parameters:<br>• All enabling work / platform constructed by National Grid.<br>• Cable installation works as described above<br>• Equipment may include:<br>  ○ cable sealing ends,<br>  ○ surge arrestors,<br>  ○ earth switch,<br>  ○ disconnectors,<br>  ○ circuit breakers,<br>  ○ current transformers, | |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| | ○ voltage transformers; and<br>○ busbars | |
| | Durations:<br>• Substation construction duration = 21 - 27 months.<br>• Onshore substation O&M haul road – 7 months duration | |
| Impacts relating to construction traffic | Peak vehicle movements:<br>• Peak Heavy Goods Vehicle (HGV) movements = 494 HGV trips per day (inclusive of contingencies for incidental deliveries)<br>• Peak Light Vehicle (LV) movements = 1089 employee trips, 726 LV trips per day (applying an employee to vehicle ratio of 1.5 employees per vehicle) | Full details provided in ES Chapter 27 Traffic and Transport (Document Reference: 3.1.29). |
| Impacts relating to accommodation for construction personnel | In the peak month it is estimated that:<br>• Peak onshore cable route and landfall construction demand = 3261<br>• Peak onshore substation construction demand = 1452<br>• Total peak onshore construction demand = 471 personnel at any one time (of whom up to 91% could be non-local workers[3]) | It is expected that during standard construction works, the onshore workforce would be an average of 186 personnel over a period of 31 months. |
| **Operation** | | |

[1] Based on indicative average daily personnel requirements per month for sections 1 to 7 of the cable route
[2] Employment levels expected during the construction of one substation.
[3] The share of non-local workers is based on the lifetime local and total UK content by supply chain category analysis for the worst-case scenario (see ES Appendix 31.1 (Document Reference: 3.3.70) for more information). The relevant supply chain categories for the estimation are onshore substation and onshore export cable installation.

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| Impacts relating to the offshore infrastructure | Array area:<br>• 95km$^2$ | |
| | Maximum number of WTG:<br>• 34 smallest WTG<br>or<br>• 57 largest WTG | |
| | Maximum Wind Turbine Generator (WTG) tip height:<br>• Smallest WTG – 274.4m<br>or<br>• Largest WTG – 377.4m | |
| | Number of offshore substation platforms (OSP):<br>• Up to 2 OSP | |
| | Cable repairs and reburial<br>Reburial of around 5km of array/interconnector cable is estimated over the life of the Project<br>Reburial of around 5km of export cable is estimated over the life of the Project<br>Five array/interconnector cable repairs are estimated over the Project life.<br>Four export cable repairs are estimated over the Project life. | |
| Impacts relating to the onshore cable route | Cable route operational physical parameters:<br>• No. of link boxes = up to 96<br>• Link box footprint (per box) = 0.6 x 1 x 1.5m | |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| | Indicative duration of operation phase:<br>30 years | |
| | Interactions with PRoW and other onshore recreation infrastructure:<br>There is a total of 78 PRoW and one NCN route located within 500m of the onshore project area, of which 29 PRoW and one NCN of which are directly intersected by the onshore project area. | |
| Impacts relating to the onshore substation | • Maximum onshore substation platform footprint: 280 x 210m<br>• Maximum external equipment height (lightning masts): 18m<br>• Construction compound indicative dimensions (m): 150 x 250m<br>• Component transport indicative max. height on loaded transporter (m): 5m<br>• Component transport max. axle load for loaded transporter (tonnes): 24 tonnes | Normal operating conditions would not require lighting at the onshore substation, although low level movement detecting security lighting may be utilised for health and safety purposes. Temporary lighting during working hours would be provided during maintenance activities only. Low level continuous noise emissions would also be generated by the onshore substation during operation. |
| **Decommissioning** | | |
| No final decision has yet been made regarding the final decommissioning policy for the onshore project infrastructure including landfall, onshore cable route, 400kV cable route and onshore substation. It is also recognised that legislation and industry good practice change over time. However, the following offshore infrastructure is likely be removed, reused or recycled where practicable:<br>• Turbines including monopile, steel jacket and GBS foundations;<br>• OSPs including topsides and steel jacket foundations; and<br>• Offshore cables may be removed or left in situ depending on available information at the time of decommissioning.<br>The following offshore infrastructure is likely to be decommissioned *in situ* depending on available information at the time of decommissioning:<br>• Scour protection; and<br>• Cable protection.<br>It is likely that the onshore project equipment, including the cable, will be removed, reused or recycled where practicable and the transition bays and cable ducts being left in place. | | |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| The detail and scope of the decommissioning works will be determined by the relevant legislation and guidance at the time of decommissioning and will be agreed with the regulator. It is anticipated that for the purposes of a worst case scenario, the impacts will be no greater than those identified for the construction phase. | | |

### 32.3.3 Summary of mitigation embedded in the design

17. This section outlines the embedded mitigation relevant to the tourism and recreation assessment, which has been incorporated into the design of North Falls (Table 32.3). Where additional mitigation measures are proposed, these are detailed in the impact assessment (Section 32.6), where applicable.

**Table 32.3 Embedded mitigation measures**

| Parameter | Mitigation measures embedded into North Falls design |
|---|---|
| Onshore site selection | The onshore project area has been defined following an extensive site selection process, which has sought to take account of environmental, engineering, planning, and land requirements to seek to identify the least sensitive project location. The site selection process is described in detail in ES Chapter 4 Site Selection and Assessment of Alternatives (Document Reference: 3.1.6). The site selection process has included consideration of the following design principles:<br>• Minimising land take where practicable (subject to environmental and engineering constraints);<br>• Avoiding residential titles (including whole garden) where practicable;<br>• Avoiding direct significant impacts to mature woodland and ancient woodland;<br>• Avoiding scheduled ancient monuments and listed buildings;<br>• Avoiding direct significant impacts to internationally and nationally designated areas (e.g. Special Areas of Conservation (SAC), Special Protected Areas (SPA), Sites of Special Scientific Interests (SSSI));<br>• Avoiding national landscape designations (e.g. National Landscapes, Heritage Coast);<br>• Avoiding important tourism destinations and recreational assets (e.g. NCN routes, caravan parks);<br>• Minimising the number and length of trenchless crossings;<br>• Minimising the number of crossings of utility, road, and rail lines; and<br>• Minimising impacts to local residents in relation to access to services and road usage, including PRoW closures and diversions. |
| Offshore site selection | The offshore cable corridor was selected in consultation with key stakeholders to select a route which minimised impacts on a range of receptors such as designated sites and shipping and navigation. The site selection process is described in detail in ES Chapter 4 Site Selection and Assessment of Alternatives (Document Reference: 3.1.6). |
| Rolling construction programme | Construction works along the final onshore cable route will employ a sectionalised approach to minimise impacts. The trenches will be excavated and backfilled once the cable ducts are laid, and the reinstatement process will commence in as short a timeframe as possible. |
| Horizontal Directional Drilling (HDD) at landfall | The Applicant has committed to install the cables at the landfall using HDD, thereby avoiding physical disturbance or prolonged access restrictions to Frinton Beach and Holland Haven. |
| Trenchless crossings | The Applicant has committed to using trenchless crossing techniques such as HDD at major crossings such as major roads, river, and rail crossings. |
| PRoW crossings | An OPRoWMP (Document Reference: 7.17) has been submitted as part of the Development Consent Order (DCO) application, which includes a full list of crossings |

| Parameter | Mitigation measures embedded into North Falls design |
|---|---|
| | and a description of onshore construction techniques at each location and other proposed mitigation measures.<br><br>Disruption to PRoWs will be managed by the Principal Contractor to ensure continued safe access along the PRoW for members of the public, and all efforts will be made to minimise PRoW closure durations. The exact management method will be agreed in advance with the relevant local authority and detailed within the final PRoW Management Plan, secured through DCO Requirement. Methods available include:<br><br>• Where practicable and safe PRoWs shall remain open; and<br><br>• Temporary road closures and diversions in place.<br><br>Where the onshore substation will be constructed and onshore export cables installed, any PRoW that is within 500m shall remain open where practicable to minimise impacts to recreational users. Where this is not practicable and a PRoW is intersected by the onshore substation construction and cable installation during construction and operational phases, a suitable, short term, temporary diversion will be established. Diversions will be agreed upon prior to the commencement of the Project with all relevant bodies, for all footpaths, bridleways, byways and cycle routes affected.<br><br>Where haul roads intersect PRoWs, access shall be maintained safely through use of banksman and gates where necessary, ensuring there is minimal impact to the footpath, bridleway, byway or NCN.<br><br>Where open cut trenching is used, trenches will be reinstated following the installation of the cable ducts to allow PRoW to be repaired and reopened as soon as possible.<br><br>Where the temporary diversions will be established, relevant safety measures shall also be implemented. This shall include, for example, the erection of fencing where necessary and safety signs for guidance. This mitigation measure will allow tourists and visitors to adapt to the affected PRoWs as a result of the Project.<br><br>All mitigation measures above, shall be maintained throughout the use of the temporary/permanent PRoWs during the construction of the Project. Maintenance shall include:<br><br>• Repairing damage caused throughout construction;<br><br>• repairing/ resurfacing PRoW when needed;<br><br>• inspection and maintenance of new signage installed for guidance;<br><br>• inspection and maintenance of drains along these diverted routes and<br><br>• clearance of litter along PRoWs associated with the temporary construction works.<br><br>A contractor will undertake an inspection survey of the affected PRoWs at the following times:<br><br>• Prior to the commencement of the construction phase;<br><br>• At least once during the construction phase and<br><br>• Following the completion of the construction phase. |
| Perimeter fencing and Safety zones | Working areas during construction and operational maintenance will be enclosed within fencing, enabling continued use of nearby routes whilst work is underway where practicable. The type of fencing will be selected to suit the location and practicable and will be agreed with the relevant local authority. Similar approaches will be implemented for coastal construction works around the landfall compound and marine works along the offshore cable corridor and around the array area. Offshore safety zones will also |

| Parameter | Mitigation measures embedded into North Falls design |
|---|---|
| | be sought, and the buffer area will be drawn as appropriate, further details are given in ES Chapter 15, Shipping and Navigation (Document Reference: 3.1.17) |
| Management plans | Outline management plans which oversee construction activities and operation, and maintenance (O&M) activities have been prepared and submitted alongside the DCO application. These plans include an Outline Code of Construction Practice (OCoCP) (Document Reference: 7.13) covering construction dust, noise, vibration, and other forms of pollution, an Outline Construction Traffic Management Plan (OCTMP) (Document Reference: 7.16), Outline Landscape and Ecological Management Strategy (OLEMS) (Document Reference: 7.14). The implementation of these plans will mitigate the identified potential impacts of the Project. |
| Commitment to no overhead lines | The commitment to use underground cable systems for the onshore cable route between the landfall and electrical connection point avoids the requirement to construct new overhead lines. The mitigation embedded in this approach will lead to notably reduced impacts on landscape and visual receptors during the construction phase and practically no impacts during the operation phase. It also notably reduces the potential for the onshore cable route to contribute to significant cumulative effects. The construction works will also be notably smaller scale than those required to install new overhead lines. |
| Community engagement | Community engagement is ongoing and will continue after submission of the DCO and throughout the development of the Project. Stakeholders in relation to tourism and recreation that have been and will continue to be engaged include:<br>• Local authorities;<br>• Landowners; and<br>• Local communities and businesses, including local accommodation suppliers.<br>Consultation has helped to ensure that management plans have been prepared and are implemented sufficiently to mitigate any potential impacts. |

## 32.4 Assessment methodology

### 32.4.1 Legislation, guidance and policy

#### *32.4.1.1 National Policy Statements*

18. The assessment of likely significant effects upon tourism and recreation has been made with specific reference to the relevant National Policy Statements (NPSs) with respect to the NSIPs are the NPS. Those relevant to the Project are:

- Overarching NPS for Energy (EN-1) (Department for Energy Security and Net Zero (DESNZ) 2023a);
- NPS for Renewable Energy Infrastructure (EN-3) (DESNZ 2023b); and
- NPS for Electricity Networks Infrastructure (EN-5) (DESNZ 2023c).

19. As noted in ES Chapter 3 Policy Legislative Context (Document Reference: 3.1.5), the British Energy Security Strategy, published in April 2022, sets out how Britain will accelerate homegrown power for increased energy independence. The Strategy includes renewables and offshore wind. The Strategy aims to increase the pace of offshore wind deployment by 25%, with an ambition to deliver 50GW of offshore wind by 2030. To enable delivery of the commitments in 2022 'British Energy Security Strategy', the department reviewed and strengthened the NPSs. The UK Government announced a review of the NPSs within its December 2020 Energy White Paper (HM Government, 2020) and issued a draft version of Overarching NPS for Energy EN-1, NPS for Renewable Energy Infrastructure EN-3 and NPS for Electricity Networks Infrastructure EN-5 for consultation on 6th September 2021. Revised drafts of the NPSs were then issued for consultation by DESNZ on 30th March 2023. The extant NPSs were published in November 2023 and were designated by Parliament on 17th January 2024.

20. The specific assessment requirements for tourism and recreation, as detailed in the NPS, are summarised in Table 32.4 together with an indication of the section of the ES chapter where each is addressed. Please note that there are no relevant NPS for Electricity Networks Infrastructure EN-5 requirements specific to the topic of tourism and recreation.

**Table 32.4 NPS assessment requirements**

| NPS Requirement | NPS Reference | ES Reference |
|---|---|---|
| **Overarching NPS for Energy (EN-1)** | | |
| The ES (see Section 4.3) should include an assessment of the effects on the coast, tidal rivers and estuaries. In particular, applicants should assess… the effects of the proposed project on maintaining coastal recreation sites and features | EN-1 section 5.6.11 | Impacts associated with coastal recreation sites and features are assessed in Section 32.6. |
| Applicants will need to consult the local community on their proposals to build on existing open space, sports or | EN-1 section 5.11.9 | The Project will not build permanent above ground infrastructure on publicly accessible open space, sports or recreational buildings |

| NPS Requirement | NPS Reference | ES Reference |
|---|---|---|
| recreational buildings and land. Taking account of the consultations, applicants should consider providing new or additional open space including green and blue infrastructure, sport or recreation facilities, to substitute for any losses as a result of their proposal. When considering proposals for green infrastructure, Applicant's should refer to the Green Infrastructure Framework. | | and land. Permanent land take from such assets is thus scoped out from the assessment. |
| Applicants should use any up-to-date local authority assessment or, if there is none, provide an independent assessment to show whether the existing open space, sports and recreational buildings and land is surplus to requirements. | EN-1 Section 5.11.10 | Recreational assets are included in the baseline environment, as described in Section 32.5. |
| Public Rights of way, National Trails, and other rights of access to land are important recreational facilities for example for walkers, cyclists and horse riders. The Secretary of State should expect applicants to take appropriate mitigation measures to address adverse effects on coastal access, National Trails, other rights of way and open access land and, where appropriate, to consider what opportunities there may be to improve or create new access. In considering revisions to an existing right of way, consideration should be given to the use, character, attractiveness, and convenience of the right of way. | EN-1 Section 5.11.30 | Embedded mitigation measures are listed in Section 32.3.3. |
| In considering the impact on maintaining coastal recreation sites and features, the Secretary of State should expect applicants to have taken advantage of opportunities to maintain and enhance access to the coast. | EN-1 Section 5.11.35 | Embedded mitigation measures are listed in Section 32.3.3. |
| This assessment should consider all relevant socio-economic impacts, which may include: the provision of additional local services and improvements to local infrastructure, including the provision of educational and visitor facilities; effects (positive and negative) on tourism and other users of the area impacted; and the impact of a changing influx of workers during the different construction, operation and decommissioning phases of the energy infrastructure. | EN-1 section 5.13.4 | Tourism and recreational assets are included in the baseline environment, as described in Section 32.5, and impacts to these assets are assessed in Section 32.6, including any impacts associated with hotel facilities and standard rental accommodation due to an influx of workers.<br>The socio-economic implications from tourism and recreation effects are addressed in ES Chapter 31 Socio-economics (Document Reference: 3.1.33). |

| NPS Requirement | NPS Reference | ES Reference |
|---|---|---|
| Socio-economic impacts may be linked to other impacts, for example visual impacts considered in Section 5.10 but may also have an impact on tourism and local businesses. Applicants are encouraged, where practicable, to demonstrate that local suppliers have been considered in any supply chain. | EN-1 section 5.13.6 | Other ES chapters that should be cross-referenced for tourism and recreational impacts are identified in Section 32.1.<br>Visual impacts to tourism and recreational assets are assessed in Section 32.6. |
| **NPS for Renewable Energy Infrastructure (EN-3)** | | |
| The Secretary of State should be satisfied that the scheme has been designed to minimise the effects on recreational craft and that appropriate mitigation measures, such as buffer areas, are built into applications to allow for recreational use outside of commercial shipping routes.<br>In view of the level of need for energy infrastructure, where an adverse effect on the users of recreational craft has been identified, and where no reasonable mitigation is feasible, the Secretary of State should weigh the harm caused with the benefits of the scheme. | EN-3 section 2.8.332-333 | Impacts on marine and coastal tourism and recreational activities, including recreational crafts, are assessed in Section 32.6. |

#### *32.4.1.2 Other legislation, policy and guidance*

21. In addition to the NPS, there are a number of pieces of legislation, policy and guidance applicable to the assessment of tourism and recreation. It should be noted that the NPS are the primary policy documents applicable to an NSIP such as North Falls.

22. The onshore project area falls under the jurisdiction of the Tendring District Council and the Essex County Council. Local planning policy documents from local authorities covered by the onshore study area that are relevant to tourism and recreation are summarised in Table 32.5:

    - Tendring District Local Plan 2013-2033 and Beyond: North Essex Authorities' Shared Strategic Section 1 (2021);
    - Tendring District Local Plan 2013-2033 and Beyond: Section 2 (2022);
    - Tourism Strategy for Tendring 2021-2026 (2021);
    - The Essex Rights of Way Improvement Plan (2009);
    - Essex Green Infrastructure Strategy (2020);
    - Essex Walking Strategy (2021); and
    - Essex Cycling Strategy (2016).

23. Other relevant planning policy documents from neighbouring local authorities that fall within the marine and coastal study area include:

- Suffolk Coastal Local Plan (2020);
- Waveney Local Plan (2019);
- Local Plan for the Broads 2015-2036 (2019); and
- East Suffolk's Visitor Economy Strategy 2022-2027 (2022).

24. Further details, where relevant, are provided in ES Chapter 3 Policy and Legislative Context (Document Reference: 3.1.5).

**Table 32.5 Relevant local planning policies**

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| **Tendring District** | | | |
| Tendring District Local Plan 2013-2033 and Beyond: North Essex Authorities' Shared Strategic Section 1 | Policy SP6: Infrastructure and Connectivity | Section C. Social Infrastructure<br>Health and Wellbeing<br>The conditions for a healthy community will be provided through the pattern of development, good urban design, access to local services and facilities; green open space and safe places for active play and food growing, and which are all accessible by walking, cycling and public transport. | Impacts to local recreational services and facilities, including walking and cycling networks, are considered in Section 32.6. |
| Tendring District Local Plan 2013-2033 and Beyond: Section 2 | Policy PP8: Tourism<br>(To be read in conjunction with Policy PP9: Hotels and Guesthouses, Policy PP10: Camping and Touring Caravan Sites, and Policy PP11: Holiday Parks) | To attract visitors to the Tendring District and support economic growth in tourism, the Council will generally support proposals that would help to improve the tourism appeal of the District to visitors, subject to other relevant policies in the Local Plan…<br>To maintain and deliver a range of accommodation that meets the varying needs, demands and expectations of potential visitors to the Tendring District, proposals that involve the creation, improvement or potential loss of visitor accommodation will be assessed based on policies set out in this Local Plan. | Impacts to tourism and recreational activities are considered in Section 32.6, including any potential loss of accommodation.<br>Socio-economic aspects of tourism impacts are assessed in ES Chapter 31 Socio-economics (Document Reference: 3.1.33) |
| | PP9: Hotels and Guesthouses | Within defined centres and along the seafront within the District's coastal towns, the Council will seek to retain the accommodation provided within existing | North Falls is not proposing to construct any additional accommodation for the use of non-local workers. |

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| | | hotels and guesthouses. Outside of these areas, the change of use or redevelopment of existing hotels and guesthouses to alternative uses will only be permitted if the applicant can demonstrate that the current use is no longer economically viable. | Impacts to tourism accommodation are considered in Section 32.6, including any potential loss of accommodation. |
| | Policy HP4: Safeguarded Open Spaces | Development that would result in the loss of the whole or part of areas designated as Safeguarded Open Space, as defined on the Policies Map and Local Maps, will not be permitted unless the following criteria are met:<br>The site is replaced by the provision of new site at least equal in quality and size and accessible to the community, which the existing site serves;<br>It is demonstrated that there is no longer a demand for the existing site;<br>The site is not appropriate for other open space functions; and<br>The development of the site would not result in the loss of an area important to visual amenity. | Impacts on recreational use of the area are considered in Section 32.6. The Project does not interact with any Open Access Land.<br>Impacts on the landscape and visual amenity are discussed in ES Chapter 30 Landscape and Visual Assessment (Document Reference: 3.1.32). |
| | Policy HP5: Open Space, Sports, and Recreation Facilities | The Council will work with partners and sports providers across the district to maintain, expand and improve the quality and accessibility of public open space, sports and recreational facilities of different types and will aim to achieve and exceed standards set out in the Council's 2017 | Impacts on recreational use of the area, including open spaces and recreational facilities, are considered in Section 32.6. |

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| | | Open Spaces Strategy or any future update. | |
| Tourism Strategy for Tendring 2021-2026 | Priority 4: Improve tourism infrastructure | Work to develop the resident and visitor experience by improving presentation of key areas, wayfinding, and enforcement where appropriate. Support and facilitate the private sector to invest in new opportunities which meet the objectives of this strategy. | Impacts on tourism and recreational activities are considered in Section 32.6. |
| | Priority 5: Develop/Improve Seafront Offer | Ensure the 27 miles of coastline in the district is maintained to the highest standards achievable within available resources and seek opportunities to develop seafront attractions to improve the resident and visitor offer | Impacts on tourism and recreational activities are considered in Section 32.6, including seafront attractions and other coastal assets. |
| **Essex County Council** | | | |
| Essex Green Infrastructure Strategy | Section 3.2: Green Infrastructure Objectives | The Green Infrastructure Strategy aims to deliver the vision through the seven objectives specified below:<br>Protect existing green infrastructure, especially designated sites<br>Improve existing green infrastructure so it is better functioning for people and wildlife<br>Create more high-quality multi-functional green infrastructure, especially in areas of deficiency<br>Improve the connectivity of green infrastructure for people and wildlife | Impacts on recreational use of the area and the green infrastructure are considered in Section 32.6.<br>Impacts on biodiversity are discussed in ES Chapter 23 Onshore Ecology (Document Reference: 3.1.25). |

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| | | Increase use and inclusivity of green infrastructure across all user groups, social groups and abilities<br><br>Provide green infrastructure facilities to promote health and wellbeing<br><br>Working with partners to build and secure funding, effective governance and stewardship for new and existing green infrastructure to ensure their long term sustainability | |
| Essex Rights of Way Improvement Plan | Objectives | To reduce fragmentation in the public rights of way network<br><br>To improve accessibility on the public rights of way network<br><br>To stimulate tourism and the local economy | Impacts on PRoW are considered in Section 32.6. |
| Essex Walking Strategy | Objective 6: Promoting walking for leisure | The Essex Growth Commission highlights coastal regeneration as an important theme, including a focus on tourism and opportunities to promote culture, outdoor recreation and the Essex landscape.<br><br>The establishment of a county coastal path will provide an opportunity for seaside tourism and coastal regeneration and will help to leverage the many health and environmental benefits that leisure walking can offer.<br><br>Promoting rural walking networks is a key aspiration of this strategy, not just because of the personal benefits but because such | Impacts on tourism and recreational activities are considered in Section 32.6, including any impacts to PRoW such as coastal paths and rural walking networks. |

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| | | networks promote closer connection with and better stewardship of important community assets. Essex County Council must be a key enabler of rural walking networks, enhancing access for all users.<br><br>To maximise the opportunities for leisure walks, the Essex County Council will seek to identify how to improve access to the PROW network; in particular those PROW that are near to our main settlements and urban areas. | |
| Essex Cycling Strategy | Strategy 7: Provide coherent cycle networks | High quality and well-planned infrastructure is vital in encouraging cycling and improving safety. We will ensure that every urban area has a well-planned, safe and well-maintained cycle network that:<br><br>• Connects key destinations;<br>• Supports a network of recreational routes and;<br>• Caters for all users and abilities.<br><br>Our coherent cycle networks will ensure that the physical barriers to cycling in many of our urban areas are progressively broken down and cycling becomes a prioritised mode of transport in the mind of Essex residents. | Impacts on recreational cycle routes are considered in Section 32.6. |

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| **East Suffolk** | | | |
| Suffolk Coastal Local Plan 2020 | SCLP 3: Suffolk Coastal Spatial Strategy | Protecting and enhancing the quality of the historic, built, and natural environment across the Suffolk coast area.<br><br>To support healthy safe cohesive and active communities through improving health, wellbeing, and education opportunities for all. Avenues of delivering on this are inspiring growth in the Ipswich strategic planning area as per policy SCLp2.1 and providing greater infrastructure provision to cater for the educational and employment opportunities for residents as well as for supporting the social wellbeing of Suffolk residents as per policy SCLP 3.5.<br><br>Mitigate the human impact on the environment and reduce contributions to climate change by conserving natural resources. This can be achieved through interventions in sustainable construction, promoting low carbon and renewable energy and supporting a coastal change management area. | Impacts on tourism and recreational activities are considered in Section 32.6. |
| | SCLP 6: Tourism | To improve the visitor experience and support opportunities for year round tourism.<br><br>The council will support proposals for tourism development that contribute to the broad appeal, accessibility and the year | Impacts on tourism and recreational activities are considered in Section 32.6. |

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| | | round nature of destinations across the East Suffolk area as per policy SCLP6.2.<br><br>Tourism Development within the Suffolk Coasts and Heath's area of natural beauty will be supported where it meets one of the 10 objectives as per SCLP6.3. These include:<br><br>• Enhances long term sustainability of the area<br><br>• Avoids, presents, or mitigates for adverse impacts on the natural environment<br><br>Tourism development outside the Suffolk Coasts and Heath's area of natural beauty will be supported if it aligns with at least one of the 7 objectives outlined in policy SCLP6.4: these include:<br><br>• Renewable energy provision is encouraged within the tourism development project<br><br>• Enhances the long term sustainability of the area<br><br>To enhance and protect the natural, built and historic environment and provide accessible green infrastructure and public open spaces. The council intends to promote measures on biodiversity and geodiversity as per policy SCLP10.2 and focus on cross-boundary mitigation of | |

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| | | effects on protected areas as per policy SCLP2.3.<br><br>The council will seek to manage tourism in a way which protects the features that makes the area attractive for visitors as well as supporting local facilities where the local road network has the capacity to accommodate the traffic generated from tourism proposals.<br><br>Proposals for new tourist accommodation will be viewed as acceptable where it meets one of the 8 objectives seen in policy SCLP6.5. These include:<br>• The demand of need for tourist accommodation is clearly demonstrated<br>• The road network is able to accommodate the volume of traffic generated without having a significant adverse impact on traffic of highway safety<br>• Covered cycle storage, proportionate to the size of the site that is being delivered.<br><br>Existing tourist accommodation will be protected this can be seen in policy SCLP6.6. | |
| East Suffolk's Visitor Economy Strategy 2022-2027 | Priority 1: Our Place | To enhance the digital connectivity across the East Suffolk district. This is assisted by | Impacts on tourism and recreational activities with |

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| | | the East Suffolk Digital Towns Project to make visitor economy businesses aware of the business opportunities that full fibre can provide and how to utilise it.<br><br>Managing development of the visitor economy to create sustainable growth. As sustainable growth in tourism can promote a better understanding and appreciation of the natural, built and historic environment. | relevance to the visitor economy identified within the second paragraph of this priority, are considered in Section 32.6 |
| | Priority 2: Our Local Businesses | Elevate visitor economy businesses, specifically to train businesses in the usage of digital technology.<br><br>The aim of the strategy is to build a visitor economy that is sustainable, net-zero, inclusive and builds upon the digital economy that will support local businesses to survive, thrive and scale up the economy. | |
| | Priority 3: Our Workforce and Skills | To upskill employees in the hospitality sector and develop clear career paths within the sector and changing attitudes towards the tourism and hospitality sector. | |
| | Priority 4: Our Identity | The aim is to ensure that tourism is supported by local residents and the local communities working in partnership with the Suffolk coast and local place groups.<br><br>Develop the Suffolk coast brand and create funding avenue opportunities into marketing and building on Suffolk's digital | |

| Document | Policy / Guidance Reference | Description of Policy / Guidance | ES Reference |
|---|---|---|---|
| | | capabilities to create greater visibility for tourists. | |
| | Priority 5: Our Partnerships | To improve the performance of the visitor economy through progressive and active partnership collaboration.<br><br>To ensure East Suffolk is represented with all key partners involved in tourism development. | |
| | Priority 6: Our Environment | To achieve net zero carbon in the visitor economy by 2030.<br>Explore the potential of the green tourism business scheme.<br><br>The development of sustainable transport methods to both residents and tourists in order to promote the visitor economy. | |
| Open for Business Strategy Babergh and Mid Suffolk District Councils | Support a thriving visiting economy (including events, activities and attractions) | The Babergh and Mid Suffolk district councils will collaborate with all stakeholders in the visitor economy sectors to deliver a “best fit” for local places and see the visitor economy (which is greater than tourism and also encompassing leisure and sports) as a significant component interlinked within broader economic strategy. | Impacts on tourism and recreational activities are considered in Section 32.6 |

#### 32.4.1.2.1 National and regional policy and strategy documents

25. There are also a number of national and regional policy documents that should be considered, the most relevant of which are listed below:

- The Tourism Recovery Plan. (Department for Digital, Culture, Media and Sport, 2021): The Tourism Recovery Plan sets out the role that the UK government will play in assisting and accelerating the tourism sector's recovery from COVID-19.
- Tourism Recovery Plan: Update on Delivery (Department of culture, Media and Sport, March 2023). The Tourism Recovery Plan remains the government strategic framework for supporting and working with the tourism sector, with this report providing updates on the six objectives outlined in the Plan over the short, medium and longer term. Overall, whilst the Tourism Recovery Plan originally set a target of recovering inbound tourism by the end of 2023, this target has been reassessed. The government's aim is to now recover 2019 levels of inbound visitors and spend by the end of 2024.
- Visit East of England Destination Development Plan: The East of England Destination Development Plan 2021-2025 (Visit East of England, 2021) provides a framework of objectives and actions for developing a sustainable, innovative visitor economy and overcoming market failures. The plan aims to:
    - Develop and promote product to raise the overall tide of year-round tourism towards the high-water mark of Summer, growing and spreading demand seasonally and geographically. Digital innovation will play a key role in this.
    - Develop initiatives that will make the East of England one of the most sustainable year-round tourism destinations in the country.
- South East LEP Economic Recovery and Renewal Strategy (2021): Strategic priority 4 of the South East LEP Economic Recovery and Renewal Strategy seeks to support the recovery, adaptation and growth of the South East LEP visitor economy.

### 32.4.2 Data source

26. The data sources that have been reviewed and used to characterise the baseline environment are outlined in Table 32.6.

**Table 32.6 Data Sources**

| Data Source | Data Set | Spatial Coverage | Year |
|---|---|---|---|
| visitessex.com / Essex County Council | Details of tourism assets and activities in Essex | County of Essex | 2022 |
| visitsuffolk.com / East Suffolk District Council / The Suffolk Coast / Suffolk Coast and Heaths | Details of tourism assets and activities in Suffolk | County of Suffolk | 2022 |

| Data Source | Data Set | Spatial Coverage | Year |
|---|---|---|---|
| Tendring District Council / Tendring Coastal Heritage | Details of tourism assets and activities in Tendring District | Tendring District | 2022 |
| PRoW Interactive Map | Interactive map of PRoW in the county hosted by Essex Highways | County of Essex | 2022 |
| Economic Impact of Tourism | Economic valuation of Essex / Suffolk tourism economy | County of Essex / East Suffolk District | 2022 |
| Tourism Strategy for Tendring 2021-2026 | Overview of tourism in Tendring | Tendring District | 2021 |
| Google Maps | Geospatial information on tourism and recreational assets | Global | 2022 |
| Royal Yachting Association Map | Geospatial information on sailing and yachting clubs | UK | 2022 |
| Keep Britain Tidy Blue Flag and Seaside Award Winners | Information on UK beaches | UK | 2022 |
| East Suffolk's Visitor Economy Strategy 2022-2027 | Overview of tourism in East Suffolk | East Suffolk District | 2022 |
| Defra's MAGIC Map | Geospatial information on designated sites | UK | 2022 |
| Natural England's Countryside Rights of Way (CRoW) and Coastal Access Maps | Geospatial information on open access lands and the coastal margin | UK | 2022 |
| Sustrans' NCN Map | Geospatial information on NCN routes | UK | 2022 |
| Long Distance Walk Association's Long Distance Paths Map | Geospatial information on long distance trails | UK | 2021 |
| Visit Britain's Accommodation Stock Audit | Census of accommodation establishments | UK | 2016 |
| Holiday and Residential Park Impact Assessment | Overview of the holiday park sector in Tendring | Tendring District | 2020 |
| Essex Rivers Hub | Information on watercourses in Essex County | County of Essex | 2022 |

| Data Source | Data Set | Spatial Coverage | Year |
|---|---|---|---|
| Finstrokes dive map | Source of dive site information for scuba divers. | UK | 2022 |
| World Travel and Tourism council | Jobs in the UK travel and tourism sector over the next decade | UK | 2022 |
| Office for National Statistics | How has lockdown changed our relationship with nature? | National | 2021 |
| Google Covid-19 Mobility Reports | Movement trends, including the usage and time spent in park, over time by Geography | Local Authority | 2020 |
| Visit Britain Overnight Trips Summary | Great Britain Domestic Overnight Trips Summary | National | 2019 |
| Home Office | Immigration System Statistics | National, Regional and Local Authority | 2023 |

### 32.4.3 Impact assessment methodology

27. ES Chapter 6 EIA Methodology (Document Reference: 3.1.8) explains the general impact assessment methodology applied to North Falls. The following sections describe the methods used to assess the likely significant effects on tourism and recreation.

28. There are no specific statutory guidelines that inform the assessment of effects on tourism and recreation receptors. The approach taken uses expert judgement informed by evidence from the offshore wind industry and is based on industry good practice for social impact assessments (Vanclay, 2015 and ONS, 2013). Reference should be made to the competent expert statement included within Section 6.4 of ES Chapter 6 EIA Methodology (Document Reference: 3.1.8) within this ES for further details.

29. For the purpose of this assessment, tourists are defined as people taking a trip to a destination outside of their usual environment whose stays are time-limited, including both overnight stays and day trips. Visitors are defined as anyone who comes to spend time temporarily at a particular place and encompass both tourists and recreational users who are residents of the local area and use local assets for their leisure. Thus, the tourism economy is considered to be a subset of the visitor economy.

30. As with other topics, the assessment uses a source – pathway – receptor model to demonstrate the mechanism of a likely significant effect.

#### *32.4.3.1 Definitions for tourism and recreation receptors*

31. The sensitivity and value of receptors, the magnitude of impact, and the significance of effect are described with a standard semantic scale and are

assessed using expert judgement. These expert judgements are guided by the conceptual understanding of the baseline conditions.

#### 32.4.3.1.1 Sensitivity and value

32. The sensitivity of a receptor (Table 32.7) is defined using the criteria in the table below.

**Table 32.7 Sensitivity of tourism and recreation receptors**

| Sensitivity | Definition | |
|---|---|---|
| | Tourism economy | Users of tourism and recreation assets |
| High | Effects can be felt by users of a type that are of high sensitivity either because they are identified as having a high priority in policy and/or are largely dependent on the recreation or access resources which the area has to offer and have few alternative resources available locally.<br><br>A receptor is considered to be of high sensitivity where tourism is identified as being a high ranking policy priority within the study area. This is relevant where the study area has highly concentrated employment in tourism in comparison with the GB average. A Location Quotient (LQ) of 1.3 (i.e. 30% more concentrated than the GB average) for employment in the tourism sector will define a receptor as having high sensitivity. | Effects can be felt by users of a type that are high sensitivity either because they are identified as having a high priority in policy (e.g. mobility-impaired users) and/or are especially dependent on the recreation resources which the area has to offer (especially if there are no alternative resources available regionally) |
| Medium | Effects can be felt by users of a type that are of medium sensitivity either because they are identified as medium priority in policy and/or are not particularly dependent on the specific recreational resources which the area has to offer and have some alternative resources available locally.<br><br>A receptor is considered to be of medium sensitivity where tourism is a policy priority within the LSA, or for the local authorities within it, (as a result of economic potential and/or need). For the purposes of the assessment, this means moderate concentrations in tourism employment, which translates into a LQ of between 1.0 and 1.3 when compared with the GB average. | Effects can be felt by users of a type that are of medium sensitivity either because they are identified as having a medium priority in policy and/or are largely dependent on the recreation or access resources which the area has to offer and have few alternative resources available locally. |
| Low | Low sensitivity is assigned to receptors that are not given specific mention in policy, or which are primarily used by casual and/or local users with many alternative recreational resources available to them.<br><br>A receptor is considered to be of low sensitivity where tourism is not identified as a policy priority within the LSA, or for the local authorities within it. This means that overall employment in tourism has low levels of concentration, which translates into a LQ of between 0.7 and 1.0. | Effects can be felt by users of a type that are of low sensitivity either because they are identified as low priority in policy and/or are not particularly dependent on the specific recreational resources which the area has to offer and have some alternative resources available locally. |
| Negligible | Negligible sensitivity is assigned to receptors that would not normally be expected to experience any adverse impact.<br><br>A receptor is considered to be of negligible sensitivity where tourism is not identified as a policy priority within the LSA, or for the local authorities within it. This means overall low | Negligible effects can be felt by those given no specific mention in policy, or by casual and/or local users with many alternative recreational resources available to them. |

| Sensitivity | Definition | |
|---|---|---|
| | Tourism economy | Users of tourism and recreation assets |
| | levels of concentrations of employment, typically a LQ of under 0.7. | |

#### 32.4.3.1.2 Magnitude

33. The magnitude of the impact (Table 32.8) is assessed according to the criteria in the table below.

**Table 32.8 Magnitude of tourism and recreation impacts**

| Magnitude | Definition for tourism economy |
|---|---|
| High | Proposals will cause a substantial change (i.e. greater than 30%) to existing patterns and levels of use of recreational resources, either permanently or for a sustained period of time (i.e. several months to permanent) and only poor-quality alternatives are available. |
| Medium | Proposals will cause a modest change (i.e. between 10% and 30%) to existing patterns and levels of use of recreation resources, or a more substantial change for a temporary, medium-term period (of weeks to a few months). |
| Low | Proposals will cause a slight (i.e. of under 10%) or short-term (i.e. less than one month) change to existing patterns and levels of use of recreation resources, with a slight reduction in overall numbers and a low level of displacement. |
| Negligible | Very minor (i.e. of under 5%) or very short-term (a few days) changes in levels and/or patterns of use. |

#### 32.4.3.1.3 Significance of effect

34. The significance of an effect is a function of the sensitivity of the receptor and the magnitude of the impact (see ES Chapter 6 EIA Methodology (Document Reference: 3.1.8) for further details). The determination of significance is guided by the use of a significance of effect matrix, as shown in Table 32.9. Definitions of each level of significance are provided in Table 32.10.

35. Should major or moderate effects be identified within the assessment, these would be regarded within this chapter as significant. Should the assessment indicate any likely significant effect, mitigation measures would be identified, where possible, in consultation with the regulatory authorities and relevant stakeholders. The aim of mitigation measures is to avoid or reduce the overall significance of effect to determine a residual effect upon a given receptor.

**Table 32.9 Significance of effect matrix**

| Sensitivity | Adverse magnitude | | | Beneficial magnitude | | | | |
|---|---|---|---|---|---|---|---|---|
| | High | Medium | Low | Negligible | Negligible | Low | Medium | High |
| High | Major | Major | Moderate | Minor | Minor | Moderate | Major | Major |
| Medium | Major | Moderate | Minor | Minor | Minor | Minor | Moderate | Major |
| Low | Moderate | Minor | Negligible | Negligible | Negligible | Minor | Minor | Moderate |
| Negligible | Minor | Negligible | Negligible | Negligible | Negligible | Negligible | Negligible | Minor |

**Table 32.10 Definition of effect significance**

| Significance | Definition |
|---|---|
| Major | Very large or large change in receptor condition, both adverse or beneficial, which are likely to be important considerations at a regional or district level. |
| Moderate | Intermediate change in receptor condition, which are likely to be important considerations at a local level. |
| Minor | Small change in receptor condition, which may be raised as local issues but are unlikely to be important in the decision-making process. |
| Negligible | No discernible change in receptor condition. |
| No change | No effect, therefore, no change in receptor condition. |

### 32.4.4 Cumulative effects assessment methodology

36. The CEA considers other plans, projects and activities that may result in cumulation with North Falls. ES Chapter 6 EIA Methodology (Document Reference: 3.1.8) provides further details of the general framework and approach to the CEA.

37. For tourism and recreation, these activities include other large-scale linear projects such as cable installations for other OWFs, other OWFs visible from the same receptors, large-scale housing projects, large scale commercial and industrial projects, and changes to infrastructure and community facilities.

### 32.4.5 Transboundary effects assessment methodology

38. The transboundary assessment considers the potential for transboundary effects to occur on tourism and recreation receptors as a result of North Falls; either those that might arise within the Exclusive Economic Zone (EEZ) of European Economic Area (EEA) states or arising on the interests of EEA states e.g. a non UK fishing vessel. ES Chapter 6 EIA Methodology (Document Reference: 3.1.8) provides further details of the general framework and approach to the assessment of transboundary effects.

39. However, given that any tourism and recreation effects would be purely within the East of England, there is no potential for transboundary effects. Therefore, transboundary effects are scoped out of this assessment and will not be considered further.

### 32.4.6 Assumptions and limitations

40. Publicly available studies of the economic impact of tourism on the local economy of Essex County and East Suffolk District have been undertaken by third parties (unrelated to the Project) and have generally used the Cambridge Economic Model. This is a computer-based model developed to estimate the volume, value, and thus economic impact of tourism at the county or district level. The model relies on information from a range of sources, but it does not take into account leakage of expenditure due to tourists taking day trips out of the area in which they stay. As the methodology and accuracy of these sources vary, the estimates can only be regarded as indicative of the scale and importance of tourism activity in the local area.

41. A review of the available evidence on tourists' perceptions of OWFs and the consequential impacts on visitor volume is presented in Section 32.5.6. It should be noted that there is a varied quality of evidence available. Evidence which is regarded to be based on particularly weak methodologies are not considered in the assessment. More weight is placed on studies which are UK based and have robust methodologies. It should be noted that the most robust evidence is typically found in studies of existing OWFs rather than those undertaken prior to consenting/construction. However, there are relatively few studies of this nature, which is a key limitation in the evidence base.

42. The most up-to-date publicly available information has been used in the preparation of the baseline. In certain cases, assumptions may need to be made when the temporal / spatial coverage or granularity of the data source do not align with the assessment's objectives. These assumptions are described when made in Section 32.6. Additionally, there are some data limitations that should be kept in consideration, as highlighted below, but these limitations are not expected to have a material effect on the predictability or accuracy of the impact assessment.

43. Information on nationally designated cycle routes is available from Sustrans, and regional and local PRoW, as designated by the Essex County Council or Tendring District Council, are available digitally. The underlying spatial data is provided by Essex County Council and therefore it is possible to map interactions between these routes and the onshore project area within this assessment. It should be noted that Essex County Council advise the interactive map of PRoW is for general purposes only[4].

44. Furthermore, there is no quantitative data available for recreational usage of most PRoW, including cycle routes, the King Charles III England Coast Path and other public open spaces. Thus, usage levels, which could represent how attractive or useful a PRoW is to visitors, were not considered when defining the sensitivity or value of each receptor.

45. PRoW crossed by haul roads are be considered in the OPRoWMP. Where haul roads intersect PRoWs, access shall be maintained safely through use of

[4] The digital sources are not the definitive map (which is held at County Hall). In law, the definitive map provides conclusive evidence of the existence of any PRoW.

banksman and gates where necessary, ensuring there is minimal impact to the footpath, bridleway, byway or NCN.

46. The most recent available data for accommodation supply in Essex and Suffolk is from a 2016 Accommodation Stock Audit conducted by Visit Britain. It should be noted that this is now several years out of date, and the number of facilities, rooms, and bedspaces may not be accurate.

47. An important caveat to the tourism and recreation assessment is the inability to fully predict the recovery trajectory of the local tourism sector. It should be noted that the baseline data is still influenced by the effects of the Covid pandemic and much of the data presented may therefore not be representative of 'normal' baseline conditions.

48. The effect the pandemic had on patterns and quantities of outdoor recreation and whether these changes will persist in the long term is even more unclear. However, ONS research undertaken in 2021 into how national lockdowns changed our relationship with nature, explored how people's perceptions of nature changed during the pandemic, and the reasons why this was. In May 2020, people's interest in nature surged from 36%, to 46% in July 2020 (ONS, 2021). This surge translated into a large spike in the use of parks and public green space during the summer of 2020 when restrictions lifted for the first time, as well as increased use of rural and coastal areas compared with pre pandemic. With increasing levels of homeworking and increased value placed on nature and the outdoors the assumption for this assessment is that in the post pandemic world recreation is just as, if not more important than ever.

49. The tourism sector is inherently linked to the macro-economic performance of the UK and rest of the world. It should be noted that there is potential that inflationary pressures experienced over recent years would curtail the recovery of the tourism sector, but this has yet to be empirically observed or studied.

50. Many of the impacts to tourism and recreation are based on qualitative assessments, which predict how local residents and tourists might perceive and change their activities in response to the Project's effects, particularly during construction. This can be complicated to predict as different individuals will perceive things in different ways. Professional judgment has been exercised when defining the sensitivity and magnitude of impact for a given receptor. The community engagement as part of the Project development has supported North Falls' understanding of these potential impacts.

51. Visitor surveys provide useful evidence to understand the characteristics of visitors to the marine and coastal study area. However, the latest surveys of visitors for Essex and Tendring are now 10 years out of date and because of this the information should be treated with caution. Equivalent visitor surveys for East Suffolk which provide data on visitor characteristics are not available publicly.

## 32.5 Existing environment

52. The baseline gives an overview of tourism trends in Essex and the Suffolk coast, before focusing on key marine, coastal, and onshore tourism and recreational assets.

### 32.5.1 Overview of tourism on the Essex and East Suffolk coast

#### *32.5.1.1 Essex coast*

53. The tourism industry is important for supporting employment across Essex where it accounted for 7.4% of all employment in 2021 (Visit Essex, 2022).

54. Tourism is especially important along the Essex coast, notably along seaside resort towns in the Tendring District such as Clacton-on-Sea, Frinton-on-Sea, and Walton-on-the-Naze. Other important towns include Harwich, Dovercourt, and Maldon. To the south of the county, Southend-on-Sea features 11km of coastline and the town's pier and adjoining theme park are popular attractions, particularly with London residents who can easily access the resort via public transport from the capital (Essex County Council, 2022). Tourism is also important inland with notable tourist attractions such as Colchester Castle, Abberton Reservoir Nature Discovery Park, and Audley End House and Gardens (Visit Essex, 2022).

55. As one of the longest coastlines in England, the Essex coast stretches over 560km and consists of long sandy beaches, picturesque coastal villages, and vibrant market towns. The Essex coast is also of an extremely high value for nature conservation, with many sites of international importance due to the area's saltmarsh and intertidal habitats. There is also a strong sense of heritage and conservation in the area owing to the remnants of traditional industries such as salt making and fishing and other historic features (Essex County Council, 2022).

56. Essex is situated within reasonable distance of major urban centres such as Peterborough, London, Cambridge, and Norwich. It also hosts key transport infrastructure such as the ports of Harwich and Tilbury and London Southend Airport (Essex County Council, 2022).

57. Within the Tendring District, there has been significant public and private sector investment in tourism over the recent years. There has been a multi-million-pound investment into Clacton Pier, Clacton Pavilion and the Pier Hotel in Harwich. In 2014, Essex County Council developed a £36 million coastal defence project stretching from Clacton Pier to Holland-on-Sea, in partnership with the Environment Agency, which also led to the creation of 23 new sandy beaches as opportunities for tourism development (Tendring District Council, 2021).

58. The Tourism Business Monitor is a quarterly survey of tourism businesses in Essex and is prepared for Visit Essex. The report from June 2023, showed that serviced accommodation (23%) accounts for the largest share of businesses, followed by visitor attractions (19%) and restaurants, cafes and takeaways (13%). In the context of recovery from the Covid-19 pandemic, 72% of the businesses surveyed said their businesses were back to profitability, and 71%

stated that they have increased their prices in order to respond to increasing costs.

#### *32.5.1.2 East Suffolk coast*

59. Tourism plays a significant role in the economy of East Suffolk with the tourism sector accounting for approximately 12% of the total district workforce. The value of East Suffolk's tourism economy is higher than any other district in Suffolk, due to its role as a tourist hub for the county (East Suffolk Council, 2022b). The natural and historic environment and landscape of the Suffolk coast are particularly important to the attractiveness of the area to visitors and therefore the strength of the East Suffolk tourism sector.

60. The Suffolk coast spans approximately 80km from Corton on the Norfolk/Suffolk border to Landguard Point in Felixstowe. Similar to Essex, tourism within East Suffolk can be characterised as coastal in nature. The district is home to the UK's most easterly point and 1,655 beach huts. There are also a number of historic hamlets and distinctive seaside and market towns along the Suffolk coast such as Aldeburgh, Lowestoft, and Southwold (East Suffolk Council, 2022a).

61. The East Suffolk coast has a rich history and heritage. A distinctive feature of the coastal region is its attractive landscape, with a large designated site, Suffolk Coast and Heaths National Landscape, stretching along the East Suffolk coast (Visit Suffolk, 2022).

62. The majority of tourists visiting East Suffolk originate from within a catchment area of around 2 to 2.5 hours that include the East of England, London, and the Southeast. The East Suffolk Lines railway network connects Ipswich to Lowestoft in the north and Felixstowe in the south, making travel available for day trippers (East Suffolk Council, 2022).

63. Substantial investment has been made to revitalise and expand the tourism economy in East Suffolk. Recent initiatives include a £2.6 million investment to build 72 new beach huts in Lowestoft, a £5.8 million investment in Sutton Hoo, and several regeneration projects along the South Seafront in Felixstowe, which led to the construction of Martello Park play area, a seafront café, and new car parking facilities (East Suffolk Council, 2022a).

### 32.5.2 Tourism volume and value statistics

64. This section presents tourism economy statistics derived using the Cambridge Economic Impact Model under licence by Destination Research published for Essex, Tendring and East Suffolk. The results are based on the data from national tourism surveys and regionally/locally based data and are sourced from studies undertaken between 2018 and 2022.

65. The latest reports available at the time of writing were published in 2023 and present 2022 data for Essex and Tendring, whereas only 2021 data was available for East Suffolk. Given that the tourism sector has now largely recovered to pre pandemic levels, the 2022 data can be assumed to represent 'business as usual' for the sector whereas the volume and value of the tourism sector was significantly reduced by the Covid-19 pandemic in both 2021 and 2020. For this reason the baseline presents tourism trends going back to 2017.

Where the latest data is 2021 the pre Covid-19 2017-2019 data reflects a more accurate representation of the baseline volume and value that could be expected in 'normal' years.

#### *32.5.2.1 Essex*

66. In 2022, tourism in Essex supported over 63,400 jobs (9.3% of all employment in Essex), 77% of which are direct, and contributed £3.3 billion to the county's economy. Table 32.11 shows the volume and value of tourism in 2022 had almost recovered to 2017-2019 levels. The data also shows the significant impact of Covid-19 with Essex experiencing a greater than 50% reduction in the value of tourism in 2020 compared to pre-pandemic levels.

67. There were a total of 52.5 million visits to Essex in 2022, 50.3 million of which were day trips. Out of the 50.3 million day trips, 9.4 million were to coastal areas.

**Table 32.11 Tourism trends in Essex (source Destination Research 2018; 2019; 2020; 2021; 2022;2023)**

| | | | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|---|---|
| Volume and value (millions) | Day trips | Number of day trips | 52.5 | 53.1 | 51.4 | 26.4 | 37.2 | 50.3 |
| | | Coastal | n/a | 8.6 | 8.4 | 4.1 | 5.9 | 9.4 |
| | | Countryside | n/a | 13.2 | 12.9 | 5.3 | 9.5 | 12.5 |
| | | Urban | n/a | 31.3 | 30.1 | 17.1 | 21.7 | 28.5 |
| | | Day trip expenditure | £1,941 | £2,013 | £2,120 | £964 | £1,478 | £2,044 |
| | | Coastal | n/a | £294 | £311 | £132 | £213 | £346 |
| | | Countryside | n/a | £432 | £460 | £164 | £327 | £440 |
| | | Urban | n/a | £1,287 | £1,349 | £668 | £938 | £1,258 |
| | Overnight visits | Number of overnight stay trips | 2.5 | 2.4 | 2.3 | 1.0 | 1.5 | 2.2 |
| | | Number of staying nights | n/a | 7.9 | 8.0 | 3.3 | 4.4 | 7.6 |
| | | Overnight stay expenditure | £439 | £424 | £432 | £170 | £241 | £466 |
| | All visits | Total number of trips | 55.0 | 55.5 | 53.7 | 27.4 | 38.7 | 52.5 |
| | | Total expenditure* | £2,457 | £2,524 | £2,618 | £1,172 | £1,783 | £2,600 |
| | | Induced spend | £860 | £879 | £917 | £426 | £635 | £691 |
| | | Tourism value | £3,316 | £3,403 | £3,536 | £1,598 | £2,418 | £3,291 |
| Employment | | Total tourism employment (number of people) | 64,650 | 66,300 | 69,050 | 44,600 | 50,500 | 63,400 |
| | | Full time equivalent (FTE) jobs | n/a | 49,400 | 51,400 | 32,350 | 37,500 | 46,800 |

| | | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|---|
| | Proportion of employment in Essex County (%) | 9.4 | 9.6 | 10.0 | 6.5 | 7.4 | 9.3 |

*Includes some associated spend not included in overnight stay and day trip expenditure (spending on second homes, boats, static vans and household spending linked to visiting friends and relatives).

68. The most recent Destination Research report (2023) also provides an overview of the seasonality of tourism in the East of England (Plate 32.1). There is a general increase in day and overnight trips across the summer months, with the sector peaking in August, as can be expected.

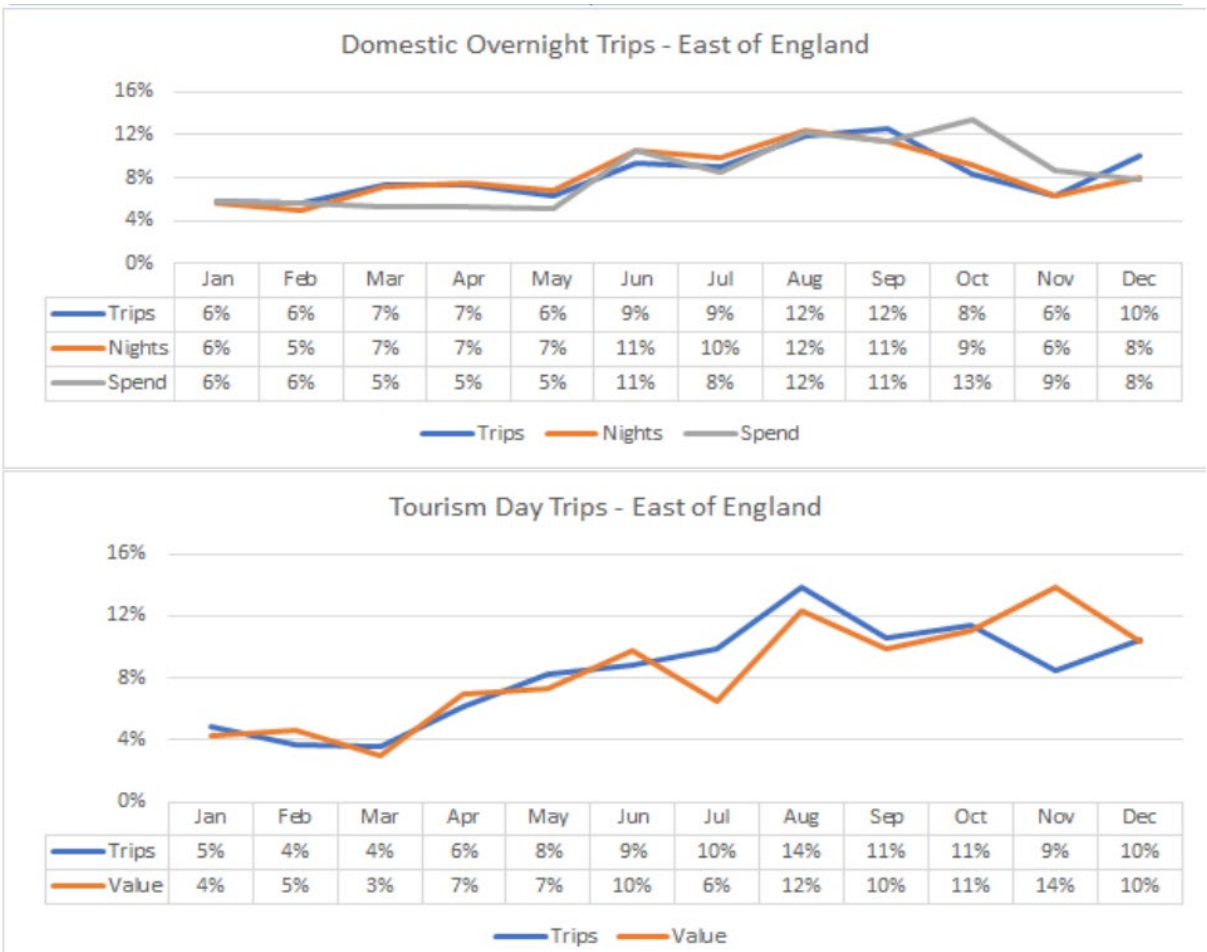


**Plate 32.1 Seasonality of tourism in the East of England (Source: Destination Research, 2023)**

69. The commentary below presents the data at the district level which allows for a more granular picture of the tourism economy.

70. The figures for economic impact of tourism in Tendring in 2022 show that the total value of tourism was £414 million which helped to support 9,250 (or 6,850 FTE) tourism related jobs (76% of which are direct) (Destination Research, 2023). This equates to a high percentage (18.7%) of all jobs in the local economy when compared to the equivalent statistic (9.3%) in Essex as a whole.

71. As seen in Table 32.12 a recovery to 2019 volume and value of tourism was almost achieved in 2022 with regards the total number of day trips (-5% on 2019), the value of day trips (-6% on 2019), the number of overnight stays (-7% on 2019), and the combined value of tourism in Tendring as a whole (-1% on 2019). The total value of tourism increased by 51% between 2021 and 2022, and the number of FTE jobs increased by 41%. 2022 levels of volume, value and employment in the tourism sector significantly exceeded both 2017 and 2018 pre pandemic levels.

72. Coastal visits are the most popular reason for visiting Tendring (with 3.3 million day visitors spending £120 million in 2022). Comparing to equivalent data for Essex in Table 32.11 shows that Tendring accounts for approximately a third of coastal day trips in Essex. Comparatively, Tendring has a far higher proportion of its visits to coastal areas compared to Essex as a whole (65% compared to 19%) showing the importance of coastal tourism to the district.

73. It should be noted that the majority of jobs and businesses in the sector in Tendring are located in and around Clacton (Tendring District Council, 2021).

**Table 32.12 Tourism trends in Tendring (Source: Destination Research, 2023)**

| | | | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|---|---|
| Volume and value (millions) | Day trips | Number of day trips | 3.5 | 3.6 | 5.4 | 2.5 | 3.6 | 5.1 |
| | | - Coastal | 1.7 | 1.7 | 3.6 | 1.3 | 2.2 | 3.3 |
| | | - Countryside | 0.4 | 0.4 | 0.38 | 0.19 | 0.28 | 0.44 |
| | | - Urban | 1.5 | 1.5 | 1.4 | 1 | 1.1 | 1.4 |
| | | Day trip expenditure | £119 | £123 | £211 | £88.10 | £136 | £198 |
| | | - Coastal | £60.90 | £63.20 | £134 | £43.30 | £79.60 | £120 |
| | | - Countryside | £12.60 | £13.20 | £13.50 | £5.70 | £9.80 | £15.30 |
| | | - Urban | £45.60 | £46.70 | £64.40 | £39.00 | £46.60 | £62.10 |
| | Overnight visits | Number of overnight stay trips | 0.4 | 0.38 | 0.38 | 0.71 | 0.27 | 0.35 |
| | | Number of staying nights | 1.4 | 1.4 | 1.5 | 0.65 | 0.93 | 1.5 |
| | | Overnight stay expenditure | £84.50 | £85.10 | £87.90 | £33.90 | £53.30 | £94.10 |
| | All visits | Total number of trips | **4.0** | **4.0** | **5.8** | **2.7** | **3.9** | **5.5** |
| | | Total expenditure* | £292 | £300 | £311.60 | £132 | £203 | £306 |
| | | Induced spend | £100 | £102 | £107 | £48.30 | £70.40 | £107 |
| | | Tourism value | **£392** | **£402** | **£419** | **£180** | **£274** | **£414** |
| Employment | | Total tourism employment (number of people) | 8,750 | 9,000 | 9,350 | 5,750 | 6,550 | 9,250 |

| | | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|---|---|
| | Full time equivalent (FTE) jobs | 6,500 | 6,650 | 6,950 | 4,150 | 4,850 | 6,850 |
| | Proportion of employment in Essex County (%) | 17.40% | 17.90% | 18.60% | 11.40% | 14.80% | 18.70% |

*Includes some associated spend not included in overnight stay and day trip expenditure (spending on second homes, boats, static vans and household spending linked to visiting friends and relatives).

74. Plate 32.2 sets out data on the types of accommodation (more information is provided on accommodation in Section 32.5.5), trips, employment and breakdown of expenditure. A holiday is the most common purpose for trips to Tendring (70%), paid accommodation is the most popular accommodation (71%) and the most expenditure is on food and drink (40%).

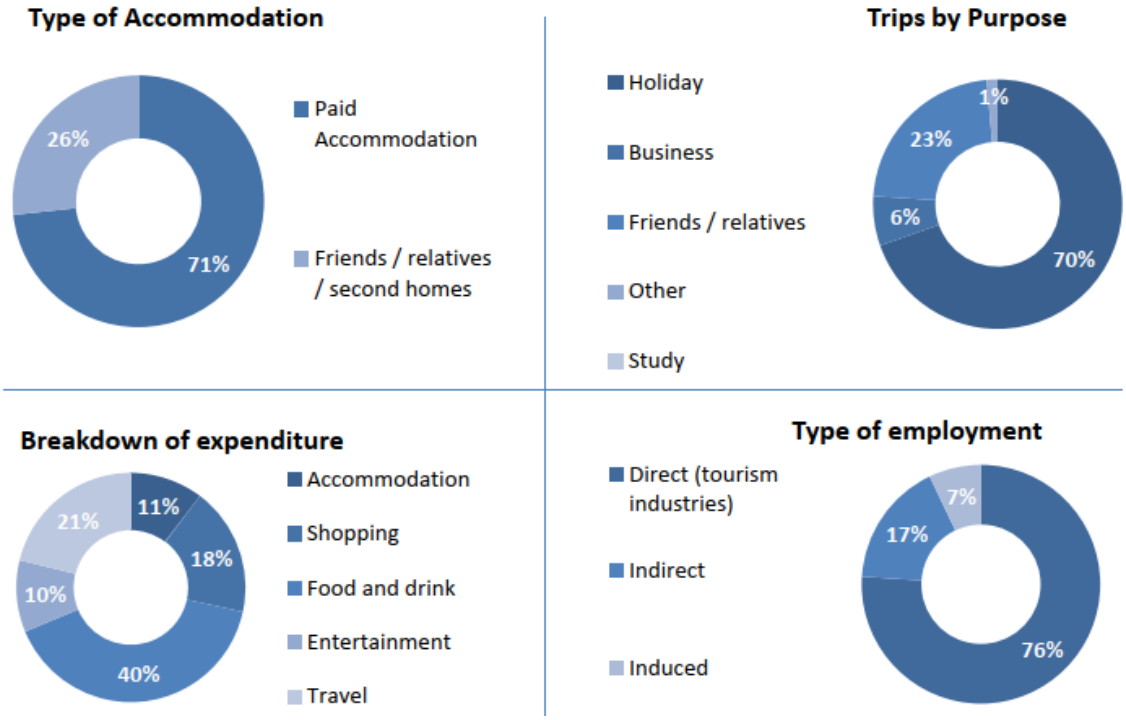


**Plate 32.2 Breakdown of tourism activity in Tendring (Destination Research, 2022a)**

### *32.5.2.2 East Suffolk*

75. East Suffolk District Council publishes annual Economic Impact of Tourism reports (summarised in Table 32.13). Based on the 2021 findings, tourism in East Suffolk supported 11,450 jobs (11.8% of all employment) and was worth roughly £466 million, forming one third of the county's total tourism value. However, these figures are also skewed by the coronavirus pandemic. Pre-pandemic, the value of the tourism sector in East Suffolk District was £695 million, with the tourism sector representing 14.3-15.1% of employment (East Suffolk Council, 2022). The decline in the number of trips and value of expenditure is shown in Table 32.13.

76. Coastal day trips have been consistently more popular than countryside and urban day trips, with 3.0 million coast day trips in 2021 compared to 2.8 million urban day trips and 2.1 million trips to the countryside.

**Table 32.13 Tourism trends in East Suffolk (Destination Research, 2018a; 2019a; 2020a; 2021a; 2022a)**

| | | | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|---|---|---|
| Volume and value (millions) | Day trips | Number of day trips | 11.3 | 12.0 | 11.8 | 5.1 | 7.9 |
| | | - Coastal | n/a | 4.8 | 4.7 | 1.8 | 3.0 |
| | | - Countryside | n/a | 3.2 | 3.2 | 1.3 | 2.1 |
| | | - Urban | n/a | 4.0 | 3.9 | 2.0 | 2.8 |
| | | Day trip expenditure (£) | £340 | £357 | £371 | £148 | £239 |
| | | - Coastal | n/a | £135 | £140 | £ | £85.0 |
| | | - Countryside | n/a | £91 | £95 | £ | £59.3 |
| | | - Urban | n/a | £132 | £136 | £ | £95.0 |
| | Overnight visits | Number of overnight stay trips | 0.72 | 0.69 | 0.70 | 0.32 | 0.48 |
| | | Number of staying nights | n/a | 2.6 | 2.7 | 1.2 | 1.8 |
| | | Overnight stay expenditure | £151 | £145 | £151 | £64 | £100 |
| | All visits | Total number of trips | 12.1 | 12.7 | 12.5 | 5.4 | 8.3 |
| | | Total expenditure* | £491 | £508 | £525 | £221 | £350 |
| | | Induced spend | £167 | £164 | £170 | £76 | £116 |
| | | Tourism value | £658 | £672 | £695 | £297 | £466 |
| Employment | | Total tourism employment (number of people) | 13,900 | 14,150 | 14,650 | 9,050 | 11,450 |
| | | FTE equivalent jobs | n/a | 10,450 | 10,800 | 6,550 | 8,400 |
| | | Proportion of employment in Essex County | 14.3% | 14.6% | 15.1% | 9.3% | 11.8% |

*Includes some associated spend not included in overnight stay and day trip expenditure (spending on second homes, boats, static vans and household spending linked to visiting friends and relatives).

77. Plate 32.3 sets out data on the types of accommodation (more information is provided on accommodation in Section 32.5.5), trips, employment and breakdown of expenditure. Similar to Tendring, a holiday is the most common purpose for trips to East Suffolk (76%), paid accommodation is the most popular accommodation (70%) and the most expenditure is on food and drink (40%).

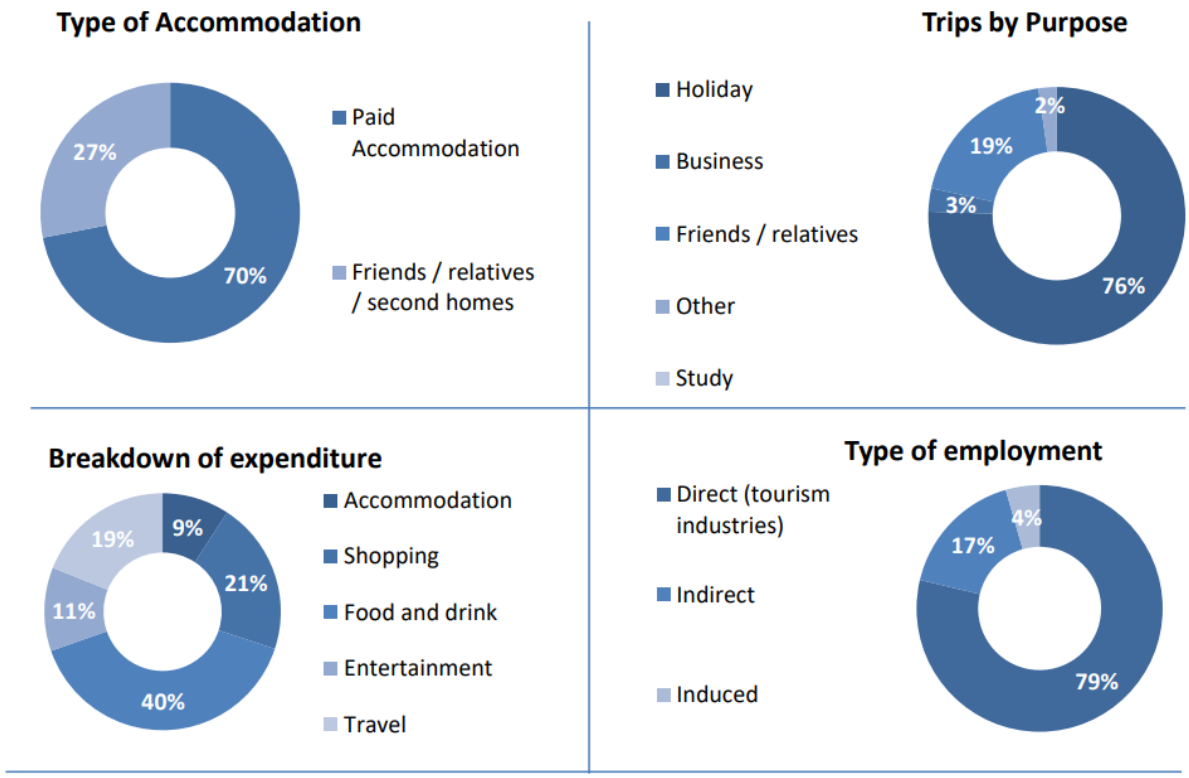


**Plate 32.3 Breakdown of tourism activity in East Suffolk (Destination Research, 2020a)**

### 32.5.3 Characteristics of visitors to Essex and Suffolk

78. Essex has a diverse tourism offering, ranging from inland towns such as Chelmsford and Colchester to seaside resorts such as Southend-on-Sea and Clacton-on-Sea. This diverse range of tourism offer attracts a diverse range of visitors. However Essex is less well known for its tourism offer compared to Suffolk, and Suffolk has many more of the highest visited attractions (see

79. Minsmere Nature Reserve is located in Saxmundham, East Suffolk. In 2022 it received 75,000 visitors. The nature reserve is owned and managed by the Royal Society for the Protection of Birds (RSPB). The site is 1,000-hectares It has been managed by the RSPB since 1947 and covers areas of reed bed, lowland heath, acid grassland, wet grassland, woodland and shingle vegetation. The site lies within the Suffolk Coast and Heaths Area of Outstanding Natural Beauty and the Suffolk Heritage Coast area. It is conserved as a Site of Special Scientific Interest, Special Area of Conservation, Special Protection Area and Ramsar site.).

80. Suffolk is characterised as a more rural county and its attractions are highly accessible for families and elderly visitors, with a range of popular National Trust properties.

81. Both Essex and Suffolk counties benefit from being situated on the East of England coast. This draws in visitors looking to have a coastal experience which is often associated with activities such as visiting beaches, areas of natural beauty e.g. Suffolk Coast and Heaths National Landscape and coastal towns and villages, walking on coastal footpaths and viewing wildlife.

82. Given that there are very limited publicly available visitor surveys that provide further insights into the characterises of visitors to Essex and Suffolk, it is challenging to gain an up to date detailed understanding of characteristics of visitors. Upon requesting further information on characteristics from key stakeholders, Tendring District Council provided the 2013 Visitor Satisfaction Survey for the South East (Tourism South East, 2013) and Tendring 2012 Visitor Survey (Tourism South East, 2012). The key points from the survey evidence relevant to the assessment of North Falls are summarised below[5]:

#### *32.5.3.1 Essex Visitor Survey*

##### 32.5.3.1.1 Methodology

83. The study was an Online survey (sample: 1000), respondents had taken at least one day trip or short break to Essex in the past 2 years and quotas were introduced to achieve an even split between day / staying visitors and between Essex residents and visitors from outside the county.

##### 32.5.3.1.2 Key relevant points

- The largest proportion of respondents fell in age groups 25-34 and 45-54;
- 11% had retired with company pension;
- Main home locations included South East (33%), East of England (20%) and Greater London (14%);
- Almost half of all visitors (46%) stopped at a place to eat or drink, 29% of respondents visited local attractions, 25% toured around, 23% participated in walking/riding/cycling and 11% participated in another outdoors activity;
- Southend (15% of trips), Chelmsford (12% of trips), Colchester (11% of trips) Basildon (9% of trips) and Clacton (7%) of trips were the most popular destinations visited by survey respondents;
- Clacton attracted a higher proportion of holidays / short breaks and 84% of visitors to Clacton have also visited other English destinations for similar type trips; and
- Respondents were asked to rate Essex destinations visited in terms of being better or worse than other places in England. Epping Forest (3.6), Colchester (3.5) and Chelmsford (3.5) all scored above the Essex average (3.3). Whereas Brentwood (3.2), Southend (3.2), Clacton (3.1) and Basildon (3.0) score slightly below average.

#### *32.5.3.2 Tendring Visitor Survey*

##### 32.5.3.2.1 Methodology

84. The survey conducted 403 face to face interviews. A Random sample of visitors in key locations was used across the three destinations between July and September 2012.

[5] Please note that this data is out of date and should therefore only be used as an indicative indicator of characteristics.

#### 32.5.3.2.2 Key relevant points

- Adults accounted for 70% of all visitors, just over a quarter (26%) account for adults between 25 and 44 years old – the prime family market age group. 30% were found to be children (0-15 years old), 37% of respondents had a retired chief income earner;
- Two thirds of all visitors lived in the East of England, with 12% visiting from Greater London and 11% from the South East. Essex generated the vast majority of all visitors from the East region and accounted for 39% of all visitors to Tendring;
- Static caravans were the most popular form of accommodation used during the trip (43%). Just over a fifth of all visitors on an overnight trip stayed at the home of a friend or relative (22%) and a further 12% in a hotel;
- Popular activities carried out by visitors during their trip to the district included visiting the beach (73%), visiting local museums or attractions (59%), visiting local shops (49%) and taking coastal walks (39%);
- Overall, 79% of all visitors used their car (or some other private motor vehicle such as motorbike or motorhome) to travel to the area. 47% of visitors arriving by car used the local car parks;
- Visitors enjoyed the following aspects of their visit to Clacton and Walton:
    - Beach, seafront or sea air, pier / arcade / amusements, activities for children and families, the friendly atmosphere and the high levels of cleanliness.
- Visitors found Harwich to have the following positive aspects:
    - Historic aspect of Harwich, including the old buildings and the naval history, cleanliness, the range of food and drink options, the quiet and relaxing nature destination as not too commercial, the pier and the passing of boats, ferries and cruise liners, the harbour area and the container port.
- Negative aspects of visits included:
    - Parking, which some visitors found too expensive and some visitors found there were a lack of spaces, access to get into the area, some visitors found the area to be a bit run down or scruffy and others found the area to be not clean enough.

### 32.5.4 Assets

#### *32.5.4.1 Popular tourism assets across Essex and Suffolk*

85. The ten most popular attractions across the Essex and Suffolk counties jointly generated close to 6.1 million visits in 2022 (Visit Britain, 2023a). However, the majority of the most popular tourist attractions are located a considerable distance inland and are therefore located outside of the marine and coastal study area. In particular, West Suffolk is home to 4 of the 10 most visited tourist attractions across Essex and Suffolk. Only Clacton Pier and the Royal Society for the Protection of Birds (RSPB) Minsmere Nature Reserve are located in the

marine and coastal study area and none of them are located in the onshore study area (identified in Section 32.3.1).

86. Clacton Pier is the largest pleasure pier in the UK covering 6.5 acres. The pier received 741,000 visitors in 2021[6]. The pier hosts a variety of entertainment facilities including a pleasure pier, arcades, Princes and West Cliff theatres, golf courses and water sports facilities. On the periphery of the town is Clacton shopping village offering local stores as well as discounted stores containing famous name brands. The seafront is popular among water sports enthusiasts, bathers and visitors looking to relax by the sea.

87. Minsmere Nature Reserve is located in Saxmundham, East Suffolk. In 2022 it received 75,000 visitors. The nature reserve is owned and managed by the Royal Society for the Protection of Birds (RSPB). The site is 1,000-hectares It has been managed by the RSPB since 1947 and covers areas of reed bed, lowland heath, acid grassland, wet grassland, woodland and shingle vegetation. The site lies within the Suffolk Coast and Heaths Area of Outstanding Natural Beauty and the Suffolk Heritage Coast area. It is conserved as a Site of Special Scientific Interest, Special Area of Conservation, Special Protection Area and Ramsar site.

#### *32.5.4.2 Marine tourism and recreation assets*

88. As the array area is located approximately 40km from the coast (at the closest point), tourism and recreational activities surrounding the array area are limited. Therefore, consideration will be focused on assets associated with diving, sailing, yachting and other recreational crafts, recreational fishing, and other marine activities closer to shore.

##### 32.5.4.2.1 Diving

89. There are no known dive sites and protected wreck sites within the offshore project area.

##### 32.5.4.2.2 Sailing, yachting, and other recreational crafts

90. There are five sailing and yachting clubs on the Tendring coastline near landfall. Further away from landfall, there are six sailing and yachting clubs in the Harwich area and three clubs along the East Suffolk coast in between Felixstowe and Orford, which may interact with the offshore project area. A summary of sailing and yachting clubs can be found in Table 32.14 and are shown graphically in ES Figure 32.2 (Document Reference: 3.2.28). Several of these clubs offer yachts, powerboats, and motor cruisers that would be capable of travelling far enough offshore to cross the array area.

**Table 32.14 Sailing and yachting clubs near the offshore project area**

| Name | Location | Type of recreational crafts offered |
|---|---|---|
| Clacton Sailing Club | Clacton-on-Sea | Dinghies, personal watercraft, windsurfing |
| Gunfleet Sailing Club | Clacton-on-Sea | Dinghies |

[6] 2021 data is presented as 2022 data was not available. However as this is an outdoor asset this is likely to have been less negatively impacted by Covid-19.

| Name | Location | Type of recreational crafts offered |
|---|---|---|
| Clacton Watercraft Club | Clacton-on-Sea | Personal watercraft |
| Walton-on-the-Naze Sea Cadets | Walton-on-the-Naze | Dinghies and powerboats |
| Walton and Frinton Yacht Club | Walton-on-the-Naze | Dinghies, motor cruisers, powerboats, and yachts |
| Shotley Sailing Club | Ipswich | Dinghies, motor cruisers, and yachts |
| Harwich and Dovercourt Sailing Club | Harwich | Motor cruisers and yachts |
| Harwich Town Sailing Club | Harwich | Dinghies, powerboats, and yachts |
| Civil Service Sailing Association | Ipswich | Dinghies and yachts |
| Shotley Point Yacht Club | Ipswich | Motor cruisers and yachts |
| Suffolk Coast Sailing Club | Ipswich | Yachts |
| Felixstowe Ferry Sailing Club | Felixstowe | Dinghies, motor cruisers, powerboats, yachts, windsurfing, and multihulls |
| Bawdsey Haven Yacht Club | Bawdsey | Dinghies, motor cruisers, and yachts |
| Orford Sailing Club | Orford | Dinghies, powerboats, and yachts |

91. There are a number of wildlife boat tours around Harwich and Walton-on-the-Naze, such as seal watching around the Hamford Water National Nature Reserve and sightseeing trips in the Walton backwaters, as well as several harbour tours departing from Brightlingsea and Mersea Island. However, these scheduled boat trips are localised around their departure sites and typically venture inland via rivers and creeks and thus are unlikely to cross the offshore project area.

92. As part of the Navigational Risk Assessment (NRA) process, North Falls conducted two vessel traffic surveys during 2022 within ten nautical miles of the former northern and southern array areas and two nautical miles of the offshore cable corridor and interconnector cable corridor. In addition to this a 2024 survey was conducted within the array area (carried out in January 2024). The northern array has been removed and the southern array is now the refined array area, the January 2024 survey was conducted on the basis of the study area of the refined array area.

93. An average of 134 unique vessels per day were recorded within the Shipping and Navigation study area (ten nautical mile buffer of the offshore array area and two nautical mile buffer around the offshore cable corridor) during the winter, rising to an average of 147 unique vessels per day during summer. The increase vessel counts in summer is primarily associated with increased volumes of wind farm vessels and recreational vessels. Around 2% of all vessels recorded during the winter intersected the array area, or an average of two vessels per day, in comparison 3% of all vessels recorded during the summer period within the study area intersected the array area, or an average of five vessels per day. An average of eight unique recreational vessels were recorded per day during the summer survey, noting these included transits through the

array area. Recreational activity was much lower in winter, with an average of less than one unique vessel per day recorded in the study area.

94. Further details about sailing, yachting, ferry lines, and other recreational crafts are discussed in ES Chapter 15 Shipping and Navigation (Document Reference: 3.1.17).

#### 32.5.4.2.3 Recreational fishing

95. Within the Tendring District, there are two well-known sea fishing locations, namely Clacton Pier and Walton Pier. These sites are outside of landfall, and since fishing only occurs within direct vicinity of the piers, they are unlikely to be affected by the Project.

96. There are a number of fishing charters operating fishing trips out of Brightlingsea and Mersea Island, such as Kaimoana Charter Fishing and Galloper Essex Sea Fishing. These departure sites are approximately 20km to the south east of the landfall and over 60km from the array area. It is important to note that recreational fishing boats may also dock and depart from some of the sailing and yachting clubs identified in Table 32.14. Further details about fishing vessel traffic can be found in ES Chapter 15 Shipping and Navigation (Document Reference: 3.1.17).

#### 32.5.4.2.4 Other marine recreational activities

97. There are some water sports hire facilities and training schools in proximity to landfall, most of which are located around Clacton-on-Sea and Frinton-on-Sea. Activities offered by these sites include paddleboarding, kitesurfing, windsurfing, and wingfoiling. Some of the sailing and yachting clubs identified in Table 32.14 such as Gunfleet Boating Club also offer kayaking and jet skiing.

### *32.5.4.3 Coastal tourism and recreation assets*

98. This section describes coastal assets along the Essex and East Suffolk coastline. Notable coastal tourism and recreation receptors in relation to landfall are shown in ES Figure 32.3 (Document Reference: 3.2.28). The Draft Open Space Assessment (Tendring District Council, 2017) and Strategic Green Gaps Review, (Tendring District Council 2020b) has been considered as part of the baseline assessment.

#### 32.5.4.3.1 Landfall

99. Landfall is located where the offshore export cables comes ashore at Kirby Brook. The strip of beach in this area is publicly accessible via coastal footpaths running from West Beach to Frinton Beach, which are then connected to public carparks to the southwest and kerbside parking to the northeast. The beach is also within walking distance to Frinton train station.

100. Frinton Beach is a quiet family beach destination noted for its cleanliness. There are rows of Victorian-style beach huts above the seawall, along the coastal footpaths and Greensward Park. The beach is divided by a series of timber groynes with zoned areas for swimming and other water sports (Visit Essex, 2022). Frinton Beach was awarded a Seaside award in 2022 by Keep Britain Tidy but was not recognised as a Blue Flag beach.

101. Holland Haven is a country park and Local Nature Reserve (LNR) located in the southwest of landfall. The country park forms part of the Holland Haven Marshes

Site of Special Scientific Interest (SSSI), notified for its coastal grazing grasslands and marshlands and importance for breeding and migrating birds. Holland Haven Country Park is frequented by bird watchers, wildlife enthusiasts, and dog walkers.

102. Adjacent to Holland Haven Country Park to the north-east of landfall is Frinton Golf Course, a 27-hole complex. The golf course also features a historic clubhouse with a terrace bar and functions as an event venue, hosting social gatherings such as weddings and Christmas parties. Holland Haven Marshes SSSI extends across the coastal strip from Clacton-on-Sea to Frinton-on-Sea and encompasses both Holland Haven Country Park and Frinton Golf Course.

103. There are two marine bathing water designations in proximity to the landfall, as shown in ES Figure 32.3 (Document Reference: 3.2.28). Bathing waters were designated under the Bathing Water Regulations 2013 to ensure that water quality standards are met and regularly monitored for bacteria in order to protect the health of people engaging in recreational activities such as swimming and water sports. The two designations close to the landfall area are Holland bathing water and Frinton bathing water. Holland bathing water is located within the landfall location and was classified as having excellent water quality. Frinton bathing water is located immediately adjacent to the landfall location to the northeast and was also classified as having excellent water quality.

104. The Rock Hotel is located approximately 273m outside of the onshore project area and has views out to sea.

#### 32.5.4.3.2 Zone of theoretical visibility from the offshore array area

105. As described in the baseline of ES Chapter 29 Offshore Seascape, Landscape and Visual Impact Assessment (Document Reference: 3.1.31), the Zone of Theoretical Visibility (ZTV) around the array area covers a large area of open water and sections of the Essex and Suffolk coast. The Zone of Theoretical Visibility (ZTV) is shown in the ES Chapter 29 Offshore Seascape, Landscape and Visual Impact Assessment Figures (ES Figures 29.1.2a to 29.1.3b (Document Reference: 3.2.25)). The Suffolk Coast Path and a total of 17 viewpoints were selected to represent the receptors within the SLVIA study area, starting as far north as Covehite in East Suffolk District (66 km from the closest North Falls turbine) to Clacton-on-Sea (49km from the closest North Falls turbine) in Tendring District and Margate in Kent (40 km from the closest North Falls turbine). The closest viewpoint selected was Orford Ness, located in East Suffolk, 40.1km to the nearest North Falls Turbine. Significant visual effects are predicted at a number of onshore viewpoints, representing high-sensitivity visual receptors with a clear coastal outlook, located within 40km of the array area. Beyond this distance, effects experienced by all visual receptors are predicted to fall below the level of significance.

106. It should be noted that a number of the existing OWFs off the Suffolk and Essex coast, including Gunfleet Sands OWF (commissioned 2010), London Array OWF (commissioned 2013), Greater Gabbard OWF (commissioned 2012), Galloper Wind Farm (commissioned 2018) and East Anglia ONE (commissioned 2020) are already visible from various coastal tourism and recreational assets, including many assets located in the areas discussed further below.

#### 32.5.4.3.3 Tendring Peninsula, Essex

107. Coastal tourism and recreational assets within the ZTV in Essex include numerous beaches, and areas to enjoy wildlife as well as attractions within the coastal towns. On a clear day North Falls may be seen whilst visiting beaches and coastal towns or engaging in recreational activity along the Essex coast from the Naze peninsula, within Clacton-on-Sea, Frinton-on-Sea, Brightlingsea, Mersea Island and Harwich (ES Chapter 29 Offshore Seascape, Landscape and Visual Impact Assessment (Document Reference: 3.1.31)).

108. Approximately 3km southwest of the landfall is the seaside town of Clacton-on-Sea, the largest settlement along the Essex 'Sunshine Coast' and in Tendring District. Clacton train station and multiple car parks and street parking locations make this area highly accessible.

109. West Beach is one of the busier seaside destinations in Essex, with several tourist attractions such as the Clacton Pier, The Pavilion Fun Park, a Seaquarium and the Seafront Gardens. Adjacent to West Beach is Martello Bay, named after the Martello towers which are small Napoleonic forts built during the 19$^{th}$ century that are characteristic of the area. Clacton-on-Sea is a popular family holiday destination and is also frequented by day trippers and water sports enthusiasts. Both West Beach and Martello Bay were awarded a Seaside Award in 2022 due to their quality but fell short of being recognised as Blue Flag beaches.

110. Albion Beach at Walton-on-the-Naze is located approximately 3km north from Frinton Beach and is home to the UK's second longest pier, Walton Pier. The beach is publicly accessible via coastal footpaths and is within walking distance from Walton train station. Similar to Frinton Beach, Albion Beach is notable for its long rows of Victorian-style beach huts and the series of wooden groynes protruding from the sand. Albion Beach was awarded a Seaside award in 2022 but was not recognised as a Blue Flag beach. The beach is a popular family destination due to its proximity to shops in the town centre and an amusement complex on the pier.

111. North of Albion Beach is Naze Beach, which is well-known for its scenic viewpoint overlooking nature reserves and Titchmarsh Marina. The cliffs along the beach are designated as a SSSI due to their geological importance. Close by is Hamford Water National Nature Reserve (NNR). Hamford Water is also a nationally and internationally important site for nature conservation, designated as a Special Protection Area (SPA), SAC, Ramsar wetland and SSSI.

112. Walton-on-the-Naze also features Naze Tower, a grade II* listed building with important maritime history. Walton Wildlife Trails, which run in a loop around the Naze peninsula, connect the Naze Cliffs to John Weston Nature Reserve, the Walton Backwaters and Hamford Water National Nature Reserve, an area that is popular among hikers and boat trippers.

113. North of the Naze peninsula is Dovercourt Bay and the port town of Harwich, which is situated on the estuaries of the Stour and Orwell rivers. Harwich has a long history of civil and military maritime significance, with notable remnants such as the Redoubt Fort, Ha'Penny Pier and the High and Low Lighthouse.

#### 32.5.4.3.4 East Suffolk coast

114. The East Suffolk coast is well known for historic seaside towns and villages. Notable areas from which North Falls may be visible on a clear day from the East Suffolk coast include the Suffolk Coast and Heaths National Landscape, Orford Ness (40.1km from the nearest turbine) and Aldeburgh (45.7km from the nearest turbine) (ES Chapter 29 Offshore Seascape, Landscape and Visual Impact Assessment (Document Reference: 3.1.31)). The King Charles III England Coast Path, once completed, will also run along this stretch of the English coastline. Directly opposite Harwich (discussed above) is the port town of Felixstowe with traditional seaside offerings such as Felixstowe Pier, the Seafront Gardens (41.3km from the nearest turbine) and Landguard Fort (42km from the nearest turbine). Natural tourist attractions (as shown in ES Figure 32.3 (Document Reference: 3.2.28)). along the East Suffolk coast include:

- Deben Estuary,
- Orford Ness National Nature Reserve,
- Royal Society for the Protection of Birds (RSPB) Minsmere nature reserve; and
- Dunwich Heath and Beach.

115. Approximately 13km north of the landfall and over 40km from the array area (at the closest point) is the Suffolk Coast and Heaths National Landscape which runs from Harwich to Kessingland. The National Landscape is a nationally important landscape designated in 1970 to conserve and enhance the habitats and biodiversity and habitats of the area. The National Landscape is home to several scenic coastal and countryside trails such as the Suffolk Coast Path, the Sandlings Walk, and the Stour and Orwell Walk.

#### 32.5.4.3.5 East Suffolk and Essex coastal assets beyond the North Falls ZTV

116. There are several areas of the East Suffolk and Essex coast which will have no to visibility of North Falls due to their location. There are therefore no visual impacts on these areas. However these are part of the marine and coastal study area and still would have potential to be impacted by changes in perceptions of visitors to the coast and are therefore included in the baseline.

117. On the northern edge of East Suffolk District, beyond the North Falls ZTV, is the Oulton Broads, the southern gateway to the Broads National Park. The area is characterised by wetlands and networks of navigable rivers, lakes, and other waterways. The Broads is a popular boating holiday destination, but it also attracts ramblers, birdwatchers, anglers, and water sports enthusiasts.

118. On the south west of the Tendring Peninsula, also beyond the North Falls ZTV, Brightlingsea is a small coastal town situated between Colchester and Clacton-on-Sea and on the mouth of the River Colne and Brightlingsea Creek. The local harbour is a small mixed leisure and commercial port, which serves as a launching point for boat excursions, fishing charters, water sports hire facilities, yachts, and other recreational crafts. This is due to its proximity to Colne Point, Blackwater Estuary, and Dengie National Nature Reserve.

119. Directly opposite of Brightlingsea and beyond the North Falls ZTV is Mersea Island, an area known for its traditional fishing villages and variety of camping

and caravanning sites. Notable tourist attractions on the island include Mersea Island Vineyard, Cudmore Grove Country Park, oyster harvesting, and beach huts.

#### 32.5.4.3.6 Coastal PRoW, heritage trails, and the King Charles III England Coast Path

120. Natural England is currently implementing its Coastal Access Scheme, which involves the construction of a 4,500km national trail around the coastline of England known as the King Charles III ECP. In addition to providing for the establishment of the long-distance trail, the legislation underpinning the King Charles III England Coast Path (ECP) also grants the public the right to access and roam the coastal margin, or the land between the trail and the sea.

121. Works on the King Charles III ECP are still underway. Within the Tendring District there is a 60km stretch from Jaywick to Harwich that is currently approved in whole and is under development. The original completion date for the entire England Coast Path was planned for the end of 2021, but progress was delayed. The new completion date is unknown, but the government has announced its commitment to make the King Charles III ECP fully walkable by the end of the current parliament (2024 or early 2025). The Jaywick to Harwich stretch of the trail will intersect with the Project at the landfall between Holland-on-Sea and Frinton-on-Sea.

122. Over 29 million leisure walking trips took place on English coastal paths in 2017 and it was estimated that over £379 million was spent in the national economy because of trips to use English coastal paths, of which £350 million was spent within local coastal economies. This was estimated to support 5,900 full time jobs in local coastal economies (Medway Council, 2023). It is therefore predicted that the England Coastal Path will be a valuable visitor asset once completed.

123. In addition to the Jaywick to Harwich section of the King Charles III (ECP), landfall also interacts with two heritage trails, which run parallel to the proposed Coast Path:

- The Frinton and Holland-on-Sea World War Two Trail, a 7km trail that runs from Frinton-on-Sea to the boundary of Holland-on-Sea and Clacton-on-Sea. The trail concentrates on the coastal defences that were built on the beaches, seawalls, and cliffs during the World War Two era.
- The Clacton Heritage Trail, a seafront trail covering more than 8km of coastline from Jaywick Sands to Holland Haven, intersecting through the Clacton town centre.

124. Landfall interacts with the following PRoW and cycle routes (ES Figure 32.4, (Document Reference: 3.2.28)):

- Frinton and Walton (BR2) bridleway;
- Frinton and Walton (FP3) footpath;
- Frinton and Walton (FP41) footpath;
- Great Clacton (FP29) footpath; and
- National Cycle Network (NCN) route 150.

#### *32.5.4.4 Onshore tourism and recreation assets*

125. This section describes onshore assets within the onshore study area.

##### 32.5.4.4.1 Watercourses

126. The Holland Brook (main river) and its tributaries, including Tendring Brook and Kirby Brook, are crossed by the onshore cable route and landfall. Holland Brook flows towards Holland Haven where it meets the sea. The downstream section of the brook features an extensive ditch system and an area of coastal grasslands, marshlands, and brackish waters designated as Holland Haven Marshes SSSI due to its ecological importance. The site is also managed by the Tendring District Council as a country park and a local nature reserve, providing for the quiet enjoyment of visitors.

127. At the northern limit of the onshore project area, near the onshore substation works area, there is a tributary of Bromley Brook that runs into Tenpenny Brook (Main River) and ultimately flows into River Colne via Alresford Creek. The Colne Estuary supports varied habitats such as saltmarshes, mud flats, reedbeds and shingle spits and is designated as a NNR, SPA, SAC, Ramsar site and a SSSI. The Colne Estuary is also a popular tourist destination for hiking and wildlife boat excursions.

128. The onshore cable route also cross a tributary of a coastal catchment associated with Hamford Water. The tributary flows into Beaumont Cut near Quay Farm, which subsequently connects to Landermere Creek and the tidal inlets of Hamford Water, designated as an SPA, SAC, SSSI, NNR and Ramsar site.

##### 32.5.4.4.2 Open access lands

129. Landfall intersects with Holland Haven Country Park. Furthermore, within the 500m buffer of the onshore project area there are two open access lands that fall under the Countryside Rights of Way (CRoW) Act 2000 (ES Figure 32.5, (Document Reference: 3.2.28)). Under the CRoW, the public are not restricted to paths but can freely walk on mapped areas of mountain, moor, heath, down, and registered common land. These areas are known jointly as open access lands, and the public can access them on foot and engage in recreational activities such as sightseeing, climbing, bird watching, and running.

130. One small parcel of open access land is situated just off Little Clacton Road and is approximately 490m away from the Onshore project area. The second area of open access land which falls under the Countryside and Rights of Way (CRoW) Act 2000, is situated at Thorpe Green, near the junction of B1035 and B1033 and is around 160m away from the Onshore project area.

##### 32.5.4.4.3 Quiet lanes

131. Quiet lanes are single-track country lanes in rural areas designated under the Transport Act 2000 and covered by the Quiet Lanes and Home Zones (England) Regulations 2006, where motorists are encouraged to take particular care of other road users. The entry and exit points of quiet lanes are clearly signed, but no additional traffic calming measures are implemented. The purpose of the quiet lanes is to encourage exercise and active modes of transport such as cycling, walking, and horse riding, as well as protecting the rural character and tranquillity of the countryside.

132. There are 17 quiet lanes in Essex located in Felsted, Brentwood, Weeley, Liston, Rivenhall, Margaretting, Stock, and Chelmsford. However, none of these quiet lanes intersect with the onshore project area.

#### 32.5.4.4.4 Long distance trails

133. Inland, the onshore cable route intersects the Tendring Hundred Hinterland long distance trail, a 50km circular loop that passes through 11 parishes, including Thorpe-le-Soken, Beaumont, and Elmstead.

#### 32.5.4.4.5 PRoW

134. The onshore project area intersects directly with PRoW and NCN routes in the following ways:

- One intersection with a bridleway;
- 28 intersections with footpaths;
- One intersection with an NCN route.

135. In total, there are 29 direct PRoW intersections and one NCN intersection with the onshore project area and a total of 78 PRoW and one NCN route which intersects with, or are within 500m of, the onshore project area.

136. These are listed below in Table 32.15 and shown in ES Figure 32.4 (Document Reference: 3.2.28).

**Table 32.15 Onshore PRoW and other walking and cycle routes**

| Route name or ID | Location | Classification | Interaction with the Project |
|---|---|---|---|
| **Intersecting with the onshore project area (ordered by landfall to substation)** | | | |
| Great Clacton FP29 | Great Clacton | Footpath | Crosses onshore cable route at landfall |
| Frinton and Walton BR2 | Frinton and Walton | Bridleway | |
| Frinton and Walton FP3 | Frinton and Walton | Footpath | |
| Frinton and Walton FP41 | Frinton and Walton | Footpath | |
| NCN 150 | Frinton and Walton | National Cycling Network | |
| Frinton and Walton FP6 | Frinton and Walton | Footpath | Intersects with an onshore cable route construction access |
| Frinton and Walton FP11 | Frinton and Walton | Footpath | Intersects with the onshore cable route |
| Frinton and Walton BR38 | Frinton and Walton | Footpath | Intersects with the onshore cable route and O&M access |
| Thorpe Le Soken FP13 | Thorpe Le Soken | Footpath | Intersects with the onshore cable route |
| Thorpe Le Soken FP7 | Thorpe Le Soken | Footpath | Intersects with the onshore cable route |

| Route name or ID | Location | Classification | Interaction with the Project |
|---|---|---|---|
| Thorpe Le Soken FP4 | Thorpe Le Soken | Footpath | Intersects with the onshore cable route |
| Thorpe Le Soken FP3 | Thorpe Le Soken | Footpath | Intersects with the onshore cable route |
| Thorpe Le Soken FP1 | Thorpe Le Soken | Footpath | Intersects with the onshore cable route |
| Thorpe Le Soken FP18 | Thorpe Le Soken | Footpath | Intersects with the onshore cable route |
| Beaumont Cum Moze FP18 | Beaumont Cum Moze | Footpath | Intersects with the onshore cable route |
| Tendring FP22 | Tendring | Footpath | Intersects with the onshore cable route and O&M access |
| Tendring FP8 | Tendring | Footpath | Intersects with the onshore cable route and O&M access |
| Tendring FP3 | Tendring | Footpath | Intersects with the onshore cable route |
| Tendring FP1 | Tendring | Footpath | Intersects with the onshore cable route and O&M access |
| Wix FP31 | Wix | Footpath | Intersects with the onshore cable route and O&M access |
| Wix FP32 | Wix | Footpath | Intersects with the onshore cable route and O&M access |
| Wix FP37 | Wix | Footpath | Intersects with the onshore cable route |
| Wix FP15 | Wix | Footpath | Intersects with onshore cable route |
| Little Bromley FP17 | Little Bromley | Footpath | Intersects with the onshore cable route |
| Little Bromley FP16 | Little Bromley | Footpath | Intersects with the onshore cable route and O&M access |
| Little Bromley FP15 | Little Bromley | Footpath | Intersects with the onshore substation drainage works |
| **Intersecting onshore project area - O&M accesses only (ordered by landfall to substation)** | | | |
| Frinton and Walton FP1 | Frinton and Walton | Footpath | Intersects with O&M access route but does not intersect with the onshore cable route |
| Frinton and Walton FP5 | Frinton and Walton | Footpath | |
| Frinton and Walton FP10 | Frinton and Walton | Footpath | |
| Wix FP14 | Wix | Footpath | |

| Route name or ID | Location | Classification | Interaction with the Project |
|---|---|---|---|
| **PRoW and other walking and cycle routes within the onshore study area, but not intersecting the onshore project area** | | | |
| Frinton and Walton FP4 | Frinton and Walton | Footpath | Is located within 500m, but does not intersect with, the onshore project area |
| Frinton and Walton FP7 | Frinton and Walton | Footpath | |
| Frinton and Walton FP8 | Frinton and Walton | Footpath | |
| Frinton and Walton FP12 | Frinton and Walton | Footpath | |
| Frinton and Walton FP16 | Frinton and Walton | Footpath | |
| Thorpe Le Soken FP2 | Thorpe Le Soken | Footpath | |
| Thorpe Le Soken BR5 | Thorpe Le Soken | Bridleway | |
| Thorpe Le Soken FP8 | Thorpe Le Soken | Footpath | |
| Thorpe Le Soken FP21 | Thorpe Le Soken | Footpath | |
| Thorpe Le Soken FP14 | Thorpe Le Soken | Footpath | |
| Thorpe Le Soken FP17 | Thorpe Le Soken | Footpath | |
| Beaumont Cum Moze FP7 | Beaumont Cum Moze | Footpath | |
| Beaumont Cum Moze FP12 | Beaumont Cum Moze | Footpath | |
| Beaumont Cum Moze FP13 | Beaumont Cum Moze | Footpath | |
| Beaumont Cum Moze FP14 | Beaumont Cum Moze | Footpath | |
| Beaumont Cum Moze FP15 | Beaumont Cum Moze | Footpath | |
| Beaumont Cum Moze FP17 | Beaumont Cum Moze | Footpath | |
| Beaumont Cum Moze FP16 | Beaumont Cum Moze | Footpath | |
| Beaumont Cum Moze FP22 | Beaumont Cum Moze | Footpath | |
| Beaumont Cum Moze FP29 | Beaumont Cum Moze | Footpath | |
| Tendring FP2 | Tendring | Footpath | |
| Tendring FP17 | Tendring | Footpath | |
| Tendring FP18 | Tendring | Footpath | |
| Tendring FP20 | Tendring | Footpath | |

| Route name or ID | Location | Classification | Interaction with the Project |
|---|---|---|---|
| Tendring FP23 | Tendring | Footpath | |
| Wix FP13 | Wix | Footpath | |
| Wix FP16 | Wix | Footpath | |
| Wix BR38 | Wix | Bridleway | |
| Bradfield FP6 | Bradfield | Footpath | |
| Mistley FP12 | Mistley | Footpath | |
| Mistley FP14 | Mistley | Footpath | |
| Little Bentley FP1 | Little Bentley | Footpath | |
| Little Bromley FP5 | Little Bromley | Footpath | |
| Little Bromley FP7 | Little Bromley | Footpath | |
| Little Bromley FP11 | Little Bromley | Footpath | |
| Little Bromley FP13 | Little Bromley | Footpath | |
| Little Bromley FP14 | Little Bromley | Footpath | |
| Little Bromley FP20 | Little Bromley | Footpath | |
| Little Bromley FP21 | Little Bromley | Footpath | |
| Great Bromley FP4 | Great Bromley | Footpath | |
| Great Bromley FP5 | Great Bromley | Footpath | |
| Little Bromley BY22 | Little Bromley | Byway | |
| Little Bromley FP12 | Little Bromley | Footpath | |
| Great Bromley FP3 | Great Bromley | Footpath | |
| Lawford BY57 | Lawford | Byway | |
| Lawford FP23 | Lawford | Footpath | |
| Lawford FP25 | Lawford | Footpath | |
| Ardleigh FP28 | Ardleigh | Footpath | |
| Ardleigh FP26 | Ardleigh | Footpath | |

#### 32.5.4.4.6 Other recreational and tourism assets

137. There are a number of other recreational businesses that are operational within 500m of the onshore project area, which are shown in shown in ES Figure 32.5 (Document Reference: 3.2.28), and include:

- Frinton Golf Club crosses the onshore project area;

- Tendring Green Allotments, is approximately 370m from the onshore project area;
- CL Cheerleading Academy, approximately 10m from onshore project area; and
- Links Combat Academy, approximately 350m from onshore project area.

138. Essex Wildlife Trust's Great Holland Pits Nature Reserve is located 25m from the onshore project area. This nature reserve was once a working gravel pit but for the last 50 years has been transformed into a wildlife haven. Also located in this area, adjacent to the onshore project area (also c.25m away from the onshore project area) is Great Holland Mill - The Granary, a holiday apartment rental.

139. A number of other small holiday accommodations are located within 500 m of the onshore project area including The Rock Hotel and Periwinkle cottage.

### 32.5.5 Accommodation in Essex and Suffolk

140. A review of the Accommodation Stock Audit compiled by Visit Britain in 2016[7] shows there were a total of 587 serviced and non-serviced establishments in the county of Essex and 1,285 establishments in the county of Suffolk. The establishments in Essex provide 12,226 rooms and 55,368 bedspaces. In comparison, Suffolk had 8,322 rooms and 20,620 bedspaces. A breakdown by district is provided in Table 32.16 and Table 32.17.

**Table 32.16 Room stock in Essex and Suffolk districts by accommodation type**

| County / District name | Total | Serviced | Non-serviced | | | |
|---|---|---|---|---|---|---|
| | | Hotel and similar establishment | Total non-serviced | Holiday dwelling | Tourist campsite | Others |
| **Total Essex** | **12,226** | **10,345** | **1,881** | **187** | **1,665** | **29** |
| Harlow | 523 | 509 | 14 | 1 | 0 | 13 |
| Epping Forest | 792 | 763 | 29 | 19 | 10 | 0 |
| Brentwood | 452 | 362 | 90 | 0 | 90 | 0 |
| Basildon | 784 | 783 | 1 | 1 | 0 | 0 |
| Castle Point | 65 | 64 | 1 | 1 | 0 | 0 |
| Rochford | 255 | 195 | 60 | 0 | 60 | 0 |
| Maldon | 988 | 510 | 478 | 47 | 431 | 0 |
| Chelmsford | 769 | 765 | 4 | 4 | 0 | 0 |

[7] Please note that this data is out of date and should be treated as indicative and the stock should be treated as minimum as (based on national trends in accommodation stock) supply across the study area is likely to have grown over time. The assessors did request more recent local data to be provided in the ETG however no data was able to be provided.

| County / District name | Total | Serviced | Non-serviced | | | |
|---|---|---|---|---|---|---|
| | | Hotel and similar establishment | Total non-serviced | Holiday dwelling | Tourist campsite | Others |
| Uttlesford | 2,064 | 2,035 | 29 | 28 | 0 | 1 |
| Braintree | 774 | 747 | 27 | 27 | 0 | 0 |
| Colchester | 1,698 | 1,200 | 498 | 20 | 466 | 12 |
| Tendring | 1,573 | 929 | 644 | 33 | 608 | 3 |
| Thurrock | 604 | 604 | 0 | 0 | 0 | 0 |
| Southend on Sea | 885 | 879 | 6 | 6 | 0 | 0 |
| **Total Suffolk** | **8,322** | **5,470** | **2,852** | **1,470** | **1,363** | **19** |
| Babergh | 1013 | 838 | 175 | 86 | 84 | 5 |
| East Suffolk | 4,115 | 1,892 | 2,223 | 1,234 | 988 | 1 |
| Ipswich | 850 | 847 | 3 | 3 | 0 | 0 |
| Mid Suffolk | 640 | 464 | 176 | 94 | 69 | 13 |
| West Suffolk | 1,704 | 1,429 | 275 | 53 | 222 | 0 |

**Table 32.17 Bedspace stock in Essex and Suffolk districts by accommodation type**

| County / District name | Total | Serviced | Non-serviced | | | |
|---|---|---|---|---|---|---|
| | | Hotel and similar establishment | Total non-serviced | Holiday dwelling | Tourist campsite | Others |
| **Total Essex** | **55,368** | **24,315** | **31,053** | **784** | **30,208** | **61** |
| Harlow | 1,300 | 1,254 | 46 | 4 | 0 | 42 |
| Epping Forest | 1,952 | 1,830 | 122 | 102 | 20 | 0 |
| Brentwood | 1,037 | 830 | 207 | 0 | 207 | 0 |
| Basildon | 1,950 | 1,944 | 6 | 6 | 0 | 0 |
| Castle Point | 139 | 135 | 4 | 4 | 0 | 0 |
| Rochford | 630 | 510 | 120 | 0 | 120 | 0 |
| Maldon | 2,191 | 1,034 | 1,157 | 185 | 972 | 0 |
| Chelmsford | 1,816 | 1,796 | 20 | 20 | 0 | 0 |
| Uttlesford | 4,717 | 4,606 | 111 | 110 | 0 | 1 |
| Braintree | 1,851 | 1,769 | 82 | 82 | 0 | 0 |
| Colchester | 29,192 | 2,595 | 26,597 | 87 | 26,498 | 12 |

| County / District name | Total | Serviced | Non-serviced | | | |
|---|---|---|---|---|---|---|
| | | Hotel and similar establishment | Total non-serviced | Holiday dwelling | Tourist campsite | Others |
| Tendring | 4,870 | 2,306 | 2,564 | 167 | 2,391 | 6 |
| Thurrock | 1,613 | 1,613 | 0 | 0 | 0 | 0 |
| Southend on Sea | 2,112 | 2,095 | 17 | 17 | 0 | 0 |
| Suffolk | 20,620 | 12,233 | 8,387 | 5,302 | 2,989 | 96 |
| Babergh | 2,336 | 1,871 | 465 | 360 | 85 | 20 |
| East Suffolk | 11,004 | 4,167 | 6,837 | 4,262 | 2,512 | 63 |
| Ipswich | 1,905 | 1,884 | 21 | 21 | 0 | 0 |
| Mid Suffolk | 1,802 | 1,201 | 601 | 450 | 138 | 13 |
| West Suffolk | 3,573 | 3,110 | 463 | 209 | 254 | 0 |

141. The majority of holiday accommodation (by bedspace) in Essex is located in Colchester District, which is situated approximately 7.5km from the nearest point on the onshore project area. The majority (91%) of Colchester's accommodation is non-serviced accommodation. Serviced accommodation includes bed and breakfast, guest houses, hotels, motels, inns, and serviced apartments. Tendring contains 929 serviced rooms, whilst in the neighbouring district, Colchester and Babergh, there are 1,200 and 838 serviced rooms respectively.

142. There are 36 holiday parks and 12 licensed residential parks in the Tendring District, which provide a total of 8,516 pitches and 892 permanent units respectively. Compared to the English average, there is a lower percentage of smaller holiday parks in Tendring District and a higher percentage of medium and very large holiday parks. Of the holiday parks, 89% are classified as caravan holiday homes, 4% as lodges/chalets/cottages, and 7% as touring and glamping pitches (Tendring District Council, 2020).

143. Based on a sample of holiday parks in Tendring (Tendring District Council, 2020a), occupancy rates (no. of occupied rooms/number of available rooms) peaked in the high season during the summer months (June to August where August peaked at 73%). Occupancy rates are lower in spring and autumn (56% in September) and lowest in the winter (9% in December). It is estimated that in 2019, the holiday park sector contributed a total of £193 million in tourism expenditure to the Tendring economy and supported a total of 3,600 FTE jobs. This indicates the importance of camping and caravanning to the local economy and aligns with the Tendring District Local Plans' position on protecting and investing in holiday parks as tourism assets.

144. Other notable conclusions from the Holiday and Residential Park Impact Assessment 2019/20 published by the Tendring District Council include:

- There is a lack of quality bedspaces in the Tendring District, which limits the region's ability to attract new tourists and encourage repeat visits;
- Supply within the Tendring holiday park sector is currently meeting demand; and
- The 'staycation' boom driven by the coronavirus pandemic and the recent economic uncertainties associated with Brexit has bolstered the holiday park sector, with increasing numbers of holidaymakers choosing to stay in the country rather than travel abroad.

145. Roughly half of the holiday accommodation in Suffolk is located in East Suffolk, which borders Tendring District (Table 32.16 and Table 32.17).

146. An additional factor to consider when assessing the availability of hotel accommodation, is the recent increase in hotels that are temporarily housing asylum seekers. At the end of Q4 2021 the number of asylum seekers accommodated in hotels across the UK nearly tripled to 26,380 from 9,421 in Q1 2021 (Refugee Council, 2022). These Asylum seekers were accommodated in a total of 207 hotels (in Q4 2021) which is more than double the number used in Q1 2021 (Refugee Council, 2022). The Covid-19 pandemic is one reason for the increases in asylum seekers staying in hotels. For the first time in Q4 2022, Essex saw hotels being used for Asylum seekers. The latest report from March 2023, shows that the local authorities of Babergh, Colchester, Ipswich and Tendring have had 165, 103, 182 and 33 asylum seekers respectively staying in hotels (HM Government, 2023).

### 32.5.6 Perceptions of offshore wind farms

147. This section of the baseline provides a literature review examining the relationship between OWFs and their associated infrastructure and tourism.

148. 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:

- The ex-ante research covers a group of studies which have been carried out to ascertain and/ or explore potential reactions to potential wind farm developments. This group makes up most 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.
- There are a limited number of ex-post studies. 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.
- The wider body of literature encompasses studies which provide secondary analysis of the evidence base, studies from overseas, general perceptions-based studies and general tourism surveys.

149. It is important to note that this research topic has a limited number of ex-post studies, with the majority of studies focussing on the impact of onshore wind

farms. This review focusses upon 29 publications from 2002 until 2022, with 18 UK-based and 11 reports from outside of the UK for comparison.

#### *32.5.6.1 Perception of tourists and visitors*

150. Studies found that around 75% (Glasgow Caledonian University, 2008) and 78% (NFO World Group, 2003) of tourists surveyed either had a neutral or positive view of wind farms. As such, between 86.7% (Aitchison, 2004) and 99% (Glasgow Caledonian University, 2008) of people said the construction of both onshore and offshore wind farms (OWF'S) would not affect their decision to return or go to the area in the future. This is also supported by a more recent meta-analysis of studies (Alem *et al.*, 2020) reviewing the socio-economic impacts of OWFs, including tourism and recreation impacts. The researchers noted that the majority of studies examined suggests that, overall, there are no significant effects to tourists and people engaging in recreational activities. The most recent publication on perceptions of OWFs authored by the Scottish Government in 2022 had similar findings, with 80% of national respondents and 83% of coastal respondents to the Scottish survey reporting that they either 'strongly approve' or 'tend to approve of' OWFs. Moreover, 81% of all respondents stated that they are unconcerned about visiting or holidaying in areas where an OWF is visible.

151. People's attitudes towards wind farm developments and the subsequent effects on their visiting behaviours are shaped by a variety of factors and generalisations should be made with caution. Alem *et al.*'s (2020) meta-analysis concludes that people's perceptions tend to be based on individual attitudes towards aesthetics and renewable energy. The evidence base also indicates that such attitudes are significantly associated with demographic factors such as household income, level of education, and age. A 2007 paper by Devine-Wright, for instance, found that younger people and those in higher socio-economic brackets tend to be more accepting of wind farm developments, which could partly be explained by their wider attitudes regarding the role of renewable energy in addressing climate change. Another 2009 study by Ladenburg found that attitude formation may also be dependent on the type and frequency of usage of the beachfront and the coastal area. For example, seasonal independent visitors such as local residents and repeat tourists tend to have a stronger connection to the coast and thus stronger attitudes regarding the wind farm compared to non-frequent visitors such as high season tourists. Tourism survey data indicates that a significant number of visitors are from areas within a few hours travel time of their destination, with the main home locations of visitors to Essex being the South East (33%), the East of England (20%) and Greater London (14%). These visitors are more likely to be repeat visitors due to their home location.

152. It is important to note that attitudes and perceptions change over time, in part due to a cohort effect and increasing awareness of the climate emergency and the need for renewable energy. A long-term public attitudes tracker of public opinion of energy related topics undertaken by the UK government Department of Business, Energy and Industrial Strategy (BEIS) (BEIS, 2012-2022) and more recently DESNZ (DESNZ, 2023d) provides robust evidence of the general public's changing attitudes to climate change, renewable energy and OWF development.

153. The DESNZ Summer 2023 Public Attitudes Tracker referenced above showed that 85% of people supported the use of renewable energy, including wind, solar and biomass. Strong support was highest for those aged 25 to 34 (63%) and lowest in those aged 65 and over (44%). Nevertheless 86% of people in the 65+ supported renewables (with 42% indicating support rather than strong support). The 65+ demographic views towards climate change have changed most dramatically since the BEIS/DESNZ public attitudes tracker began in 2012. The series of polls reveal that 84% of 65+ are now concerned about climate change, up from 56% in 2012, this has also shifted attitudes towards measures to address climate change. Regarding offshore wind specifically, 83% of respondents supported it as a source of renewable energy, compared to 78% for onshore wind. This compared to support below 75% for offshore wind in 2012. Opposition is low for offshore wind energy at 3% of respondents, this compared to 4-5% in 2012.

154. Results from perception surveys often conclude that there is a potential for negative impacts on tourism economies from OWFs. However, these perception surveys tend to be conducted prior to development and primarily utilise stated preference approaches, which introduce a significant bias to the findings due to their reliance on hypothetical questioning. In contrast to perception-based studies, a different body of research investigated the actual effects of wind farm developments on tourists' revealed preference and behaviours during the construction and operation phase. Studies in the last ten years have found that the development of wind farms in rural areas of Wales (Regeneris and The Tourism Company, 2014) and Scotland (Biggar Economics, 2017) have not had a measurable impact on the tourism economy post-development.

155. Some surveys explore the general perception of infrastructure projects, including OWFs and generally find no evidence of negative impacts from OWFs on tourism. For instance, a study undertaken by ERM (2014) on behalf of the National Grid examined the tourism impacts of major energy infrastructure in the UK. Findings suggest that neither business owners nor recreational users expect such projects to change their business performance or visiting and spending decisions respectively. There are exceptions which suggest infrastructure could have a negative impact on tourism, for example a 2017 poll conducted by YouGov for The John Muir Trust, which suggested that industrial development would deter visitors, however it is difficult to know if wind farms were the key reason for this finding as their study pooled wind farms with quarries and pylons.

156. Typically perception surveys indicate that landscape and natural beauty is one of the key factors that would attract visitors to rural tourist areas within the UK. For instance, a study in Delaware in the United States reported that people are more likely to not visit a beach with wind turbines in proximity (Lilley *et al.*, 2010). However in contrast to the perception based study an ex-post study conducted in Ireland found that the visibility of large infrastructure projects had negligible effects on people's enjoyment of the landscape (Failte Ireland, 2021). It should be noted across the literature the majority of people preferred OWFs to onshore wind farms because they perceive that there will be a lower visual impact (NFO World Group, 2003; Glasgow Caledonian University, 2008; and Northumbria University, 2014).

#### *32.5.6.2 Perception of tourism and recreation business owners*

157. Business owners can have significant opposition to wind farm development because they perceive that they would have an adverse effect on the landscape and tourism industry. Three studies of specific wind farms show that this perception reduces over time (Aitchison 2004, Eltham *et al.* 2007, and SCIRA, 2012) and is heavily influenced by the level of community engagement led by the developer (Aitchison 2004 and 2012, and Eltham *et al.* 2007). Once wind farms have been developed, acceptance tends to improve, and if additional benefits can be found (such as visitor centres or operational employment), then the opinions of tourism businesses also improve.

158. Some tourists and tourism businesses also recognise the potential for positive impacts associated with extra expenditure within the sector from workers during the construction and maintenance periods. In some cases, OWFs are also regarded as possible tourist attractions (NFO World Group, 2003 and Lilley *et al.*, 2010). For instance, a 2020 study by Smythe *et al.* interviewed tourism and recreation professionals on their experiences with Block Island Wind Farm in the United States and found that wind farms could be perceived by tourists as a novel sight or as a recreational fishing destination. These findings highlight the opportunity for local tourism organisations and wind farm developers to cooperate in promoting wind farm developments as part of 'edu-tourism' or 'eco-tourism'. This has already happened with the success of visitor centres such as Scroby Sands OWF near Great Yarmouth and Rampion OWF near Brighton. Boat trips have also proved popular in Sussex, with boat trip operators visiting Rampion OWF.

#### *32.5.6.3 Summary of OWF perceptions and visitor behaviour*

159. In summary, the literature review found that the majority of studies reported that tourists are not deterred from visiting or returning to an area due to the presence of an OWF and its associated infrastructure. There is no clear evidence of direct causality behind attitudes towards or against OWFs, since they are influenced by a complex set of factors such as demographics and the proximity of the wind farm to shore. Studies examining post-development behaviours and expenditures also reported that wind farm developments have no measurable effects upon the local tourism economy.

160. As discussed in Section 32.5.4.3.2, it is also important to note that off the Essex and Suffolk coast there are already a number of operational OWFs that form part of the existing seascape. The majority of these OWFs have been operational before 2019 and no discernible impacts on the local tourism economies of Essex and East Suffolk can be seen in the tourism statistics reported in Table 32.11 and Table 32.13 between 2017 and 2019. It should be noted that coastal day trips saw a high level of growth in 2019 in Tendring despite the existing operational wind farms. The number of coastal day visits to Essex was 5.8 million in 2007[8] (East of England Tourism, 2008) (before the

[8] Although the method may have been subject to minor changes over time the data in this report is comparable to 2018-2022 data. The data collection method is similar to the more recent volume and

development of offshore wind off the Essex coast) compared to an average annual coastal day trips to Essex of 7.3 million from 2018 to 2022 (post development of a number of offshore wind projects off the Essex coast).

### 32.5.7 Anticipated trends in baseline conditions

161. The baseline review of tourism and recreation in Section 32.5 provides a clear indication that there are important tourism and recreational assets in the marine and coastal study area as well as local assets in the onshore study area (as defined in Section 32.3.1). The main assets in the coastal study area are designated sites of ecological importance; seaside towns and maritime villages; beaches; and marine recreational activities. This has led to the development of a strong tourism economy where a high proportion of businesses supplying tourism services rely upon the attractiveness of coastal areas to maintain tourism demand. This is likely to continue in future.

162. The majority of tourism demand is from domestic tourists on day trips or short overnight trips. Demand is seasonal and weather dependent, especially for tourists that are close enough to make a day trip. Over the longer term, climate change will shift seasonal patterns due to warming temperatures, including the duration and start dates of seasons.

163. It is also important to note that the English tourism sector has benefited from the 'staycation' boom in its recovery from the coronavirus pandemic. Coastal and rural areas in particular outperformed England averages with regards to their post-Covid recovery, but overall figures for 'revenue Per Available Room' (Savills, 2022) show that the staycation market continued to outperform against pre Covid-19 norms throughout 2022 and into 2023. Latest revenue Per Available Room figures for August 2023 are 8% up from the same month in 2022 (to £95.96), whilst occupancy is up 2% to 80%. However, this occupancy rate is still lower than the August of 2019 (82%) (Visit England, 2023).

164. It should be noted that the recent economic climate in the UK has played an important factor in the demand for staycations in recent years, and will continue to do so in the years to come. In recent years the Bank of England lifted interest rates at the fastest rate since the 1980s. This was done in response to the high levels of inflation which have pushed up household spending on essential goods and services such as fuel, food, utilities and energy bills (ONS, 2022).

165. The Public Opinions and Social Trends for Great Britain survey highlighted that more than half (52%) of respondents said that their cost of living had increased compared with a month ago, and 67% of all respondents said that they are spending less on non-essentials, the trend for staycation holidays is expected to continue (ONS, 2023).

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value reports for Essex as the 2007 data also utilises information from national tourism surveys and regionally based data held by East of England Tourism.

## 32.6 Assessment of significance

### 32.6.1 Likely significant effects during construction

#### *32.6.1.1 Impact 1 Impact on users' enjoyment of recreational and tourist assets due to the construction of onshore infrastructure*

166. This section of the assessment considers the extent to which access to and enjoyment of onshore recreation and tourism assets may be affected by the construction of the onshore infrastructure of North Falls. It focusses on construction of the landfall, installation of the onshore cable route and construction of the onshore substation.

167. An overview of the proposed approach to construction of the onshore infrastructure of North Falls is provided in the ES Chapter 5 Project Description (Document Reference: 3.1.7) and the realistic worst case scenario against which the assessment is based is outlined in Table 32.2, Section 32.3.2.

168. These activities could expose visitors to disruption through the following pathways:

- Temporary closures or diversions of PRoW and other non-motorised routes;
- Visual effects;
- Air quality effects from construction dust, plant, and traffic emissions;
- Noise and vibration; and
- Effects on marine water quality from suspended sediments and sediment-bound contaminants.

169. Due to North Falls' commitment to the use of a trenchless solution at landfall, there is no requirement for prolonged beach closure throughout the construction phase, with restrictions limited to emergency access only.

170. The evidence presented within the baseline analysis (see Section 32.5) indicates that there are numerous onshore tourism and recreation assets that may be affected by onshore construction activity, those which are within 500m of the onshore project area include:

- PRoW, long distance trails and cycle paths;
- Open Access Land;
- Frinton Beach, including the beach huts;
- Frinton Golf Club;
- Holland Haven Country Park;
- Greensward Park;
- The Rock Hotel; and
- Designated bathing waters.

#### 32.6.1.1.1 Sensitivity of receptors

171. The users using each of the resources identified above have been assessed for sensitivity in accordance with the approach set out in Section 32.4.3. The results and reasoning for the assessment of sensitivity are shown in Table 32.18 below.

**Table 32.18 Sensitivity of onshore tourism and recreation receptors**

| Receptors (users of...) | Sensitivity | Reasons |
|---|---|---|
| Frinton Golf Club | Non-members – Low<br>Members – Medium | As alternative golf clubs are available to non-member visitors those users are deemed as having a low sensitivity.<br>However members are usually committed to the golf club on a long term basis and therefore are assumed to have higher sensitivity than non-members. |
| Frinton Beach Huts | Medium | The users of the beach huts at Frinton will have limited ability to adapt as they will be committed to a certain hut. Therefore, for this receptor group the sensitivity is deemed as medium sensitivity. |
| PRoW and long distance trails | Low | For users of PRoW and other non-motorised routes, their exposure to the construction works is likely to be transient as they progress along their route and therefore sensitivity is deemed to be low. |
| King Charles and NCN Route 150 | Low | The King Charles III England Coast Path and NCN Route 150 have national status and are thus considered to be high value receptors. However this value does not increase the sensitivity and is likely to add to the motivation for visitors and tourists to continue to use the area. |
| The Rock Hotel | Medium | Users of the hotel are likely to be sensitive to disruptions as they stay overnight, however there are several alternatives nearby. |
| Frinton Beach, Holland Haven Country Park and Greensward Park | Non frequent visitors – negligible<br>Local frequent users - low | For users of Frinton Beach, Holland Haven Country Park and Greensward Park there are extensive beaches, nature designations and parks available on the Tendring Peninsula and therefore there they are likely to have ability to adapt by going elsewhere if disrupted by the temporary landfall activities. The sensitivity is therefore deemed to be negligible for most visitors but low for users of who live close to and frequently visit. |
| Tendring Green Allotments | Medium | For users of allotments there is likely to be a strong connection to a particular allotment and allotments provide an important recreational resources for local communities therefore this is assessed as medium sensitivity. |
| Designated bathing waters. | Low | The two designations close to the landfall area are Holland and Frinton bathing waters, both with excellent water quality. Whilst the regulatory requirements do not dictate standards for suspended solids, waters with high turbidity can be considered as undesirable by visitors during the bathing season. Despite their national status and thus high value, designated bathing waters are not confined waterbodies, as they are connected to the North Sea, and thus have a high capacity to accommodate and recover from change due to dilution and flushing. However, if changes to the water turbidity or other physical characteristics are perceptible, people may be deterred from visiting or using these areas recreationally. Due to the availability of numerous bathing waters in the marine and coastal study area with good or |

| Receptors (users of...) | Sensitivity | Reasons |
|---|---|---|
| | | excellent water quality, tourists and visitors using bathing waters are likely to be able to adapt and therefore the sensitivity is low. |

#### 32.6.1.1.2 Magnitude of impact

172. This section assesses the magnitude of impact of the several construction processes upon the relevant onshore recreation receptors identified. The assessment of magnitude of impact, together with reasons for the conclusions are set out in Table 32.19 below.

**Temporary closures or diversions of PRoW and other non-motorised routes**

173. Table 32.15 outlines the interactions of PRoW and other walking and cycling routes with the onshore infrastructure. The majority of crossings are with footpaths. With respect to PRoW crossings, where a PRoW is crossed by the onshore project area, North Falls will keep the PRoW open where practicable to minimise impacts to recreational users. Where this is not practicable, a suitable diversion will be created, and traffic control and other safety measures would be put in place. Where haul roads cross PRoW, traffic management measures (such as manned or gated crossings) will be proposed. Where open cut trenching is used, trenches will be reinstated following the installation of the cable ducts to allow PRoW to be repaired and reopened as soon as practicable. The details of impacts and mitigation measures are set out in further detail within the OPRoWMP (Document Reference: 7.17).

174. Of the 29 PRoW and one NCN route that intersect the onshore project area:

- One bridleway, three footpaths and the NCN route are proposed to be crossed using trenchless techniques with no haul road required, which would result in no direct impacts to these routes;
- 26 footpaths have the possibility of a temporary closure or diversion due as they cross locations proposed to be used for temporary works during construction (construction haul roads, temporary construction compounds, open cut trenching, construction accesses, onshore substation drainage works). These figures are based on a worst-case scenario, based on the onshore cable route detailed within the Project's DCO application. Following identification of a refined onshore cable route during detailed design post-consent, this number is expected to reduce.

175. Following design refinements since PEIR, the location of the onshore substation has been refined and has removed the need for a potential permanent closure of Little Bromley Footpath 15, which will be temporarily closed and re-opened/reinstated during operation. No PRoWs are now proposed to be subject to permanent closure.

176. In addition, the Tendring Hundred Hinterland long distance trail follows the existing onshore PRoW and road network within the Tendring District and thus does not have its own separate trail. Crossings of this long distance trail are therefore inherently accounted for within the consideration of PRoW. Due to its

circular nature, the onshore project area intersects with the trail several times, totalling seven intersections.

177. Mitigation embedded into the design detailed in Table 32.3 will reduce potentially significant impacts to acceptable levels. The rolling construction programme will limit the spatial and temporal extent of impacts on PRoW. Several embedded mitigation measures proposed, such as the use of temporary diversions, will mean that tourists and visitors using potentially impacted routes are likely to be able to adapt and therefore will ultimately experience limited impacts.

### Visual impacts

178. The majority of visual impacts on onshore recreation and tourist asset users that will occur during the construction phase will be short term, transient, and reversible, given that land and landscape elements would be reinstated at the end of the construction phase (with the exception of permanent infrastructure (onshore substation) which is assessed in Section 32.6.2.1).

179. The spatial extent of the impacts will be localised to the onshore cable route, onshore substation works area, and any temporary construction compounds and haul roads. Furthermore, visibility from a recreation or tourist asset will not be uniform along the entire length, given that views of the surrounding landscape change depending on the topography and the presence of structures such as hedgerows and buildings.

### Impacts on air quality

180. Construction air quality impacts are described in Section 20.6 of ES Chapter 20 Onshore Air Quality (Document Reference: 3.1.22). With the implementation of mitigation measures recommended by the Institute of Air Quality Management and other industry good practice measures, which will be incorporated into the OCoCP, the residual effect is predicted to be not significant for human receptors. Therefore, it is assumed that the enjoyment of recreational and tourism assets assessed in this section will not be altered by changes to air quality.

### Noise and vibration impacts

181. Noise and vibration impacts are discussed in detail in Section 26.6 of ES Chapter 26 Noise and Vibration (Document Reference: 3.1.28). With appropriate mitigation measures in place, the residual effect of noise from onshore cable construction, Bentley Road Improvement works, noise from off-site construction traffic and construction vibration is considered to range from negligible to minor adverse, while the effect of noise from onshore substation construction and noise of landfall and nearshore works is considered to be negligible.

182. Construction vibration impacts are confined to localised areas on the final onshore cable route, and no vibration impacts are anticipated for onshore substation works. The residual effect of construction vibration is predicted to be no greater than minor adverse.

183. This level of noise and vibration is unlikely to alter behaviour and so the magnitude of impact on onshore tourism and recreational assets as a result of noise and vibration is considered to be negligible.

### Impacts on marine water quality

184. ES Chapter 9 Marine Water and Sediment Quality (Document Reference: 3.1.11) describes the impact of the landfall works on the designated bathing water.

185. The HDD exit point will be in the subtidal zone, seaward of the low water mark at 1-8m below lowest astronomical tide (LAT). The cable exit point would require excavation of a trench to bury the nearshore portion of the offshore cable on the seaward side of the landfall HDD. This excavation has the potential to increase suspended sediment close to shore. These are likely to remain within levels that are recorded naturally during storm events and will rapidly return to baseline levels.

186. ES Chapter 9 Marine Water and Sediment Quality (Document Reference: 3.1.11) concludes that the impact of increases in suspended sediments associated with the installation of the export cable in coastal waters near the HDD exit point on designated bathing water is of minor adverse significance of effect.

187. Site specific data collected to inform the North Falls EIA indicates that sediment contaminant concentrations in the offshore project area are low. Additionally, as discussed above, sediments are not predicted to remain in suspension for long periods of time.

188. This level of change to water quality is unlikely to deter visitors and tourists.

### Construction road traffic

189. ES Chapter 27 Traffic and Transport (Document Reference: 3.1.29) follows Guidelines for the Environmental Assessment of Road Traffic. The assessment relies on identifying routes that are likely to have significant changes in traffic flows from forecasted peak and average vehicle movements and assessing the impacts of construction road traffic on receptors with respect to severance, amenity, safety, and driver delays. The definitions of these factors can be found in Section 27.4, and the full assessment is described in Section 27.6 of ES Chapter 27 Traffic and Transport (Document Reference: 3.1.29).

190. Intermittent interruptions from temporary crossings at intersections with haul roads, delays from increased road traffic and temporary closures or diversions, and perceived reductions in the pleasantness of journeys and road safety can affect both drivers, pedestrians, and other non-motorised users. These different impact pathways could cumulatively decrease the attractiveness of an area to visitors, which would result in adverse impacts to the enjoyment of tourist and recreation assets. Traffic impacts are not universal across the entire road network and will only apply to certain areas. However, if these areas align with areas where tourism and recreational assets are most concentrated, their effect could be more pronounced.

191. As part of embedded mitigation, an OCTMP ((Document Reference: 7.16) has been submitted with the DCO application, which details how Heavy Goods Vehicles (HGV) and single-occupancy vehicle movements will be monitored and managed, as well as how the design of accesses and offsite highway works will be overseen. The OCTMP also includes delivery time restrictions as agreed with the Essex County Council. Moreover, an Access Strategy covering both the

construction and operation phase has also been developed, which describes how impacts of HGV traffic upon the most sensitive receptors will be reduced. The strategy details the construction of temporary haul roads along the final onshore cable route, the creation of vehicle crossovers, and the implementation of controls on vehicle routing. These management plans ensure that visitors can still access and enjoy key tourism and recreational assets.

192. Visitors to tourism and recreational assets are likely to perceive traffic interruptions and delays as a nuisance. However, traffic impacts are unlikely to completely deter people from visiting or returning to an area, assuming that their destinations are not significantly affected by other construction-related impacts.

193. ES Chapter 27 Traffic and Transport (Document Reference: 3.1.29) assessed a total of 42 highway links and six cluster sites and concluded that with the application of both embedded and additional mitigation measures, the residual effect upon all receptors would be not significant (ranging from negligible to minor adverse). All residual effects concluded in ES Chapter 27 Traffic and Transport (Document Reference: 3.1.29) are considered to be of minor adverse or negligible significance.

### Summary of magnitude of impact

194. The combined effect of the disturbance pathways described above could result in short term changes in behaviour on a small spatial scale.

**Table 32.19 Magnitude of impact on onshore recreation receptors for construction phase**

| Activity | Receptor (users of…) | Magnitude | Reasons |
|---|---|---|---|
| Construction activity at landfall | Frinton Beach Huts | Low | Due to NFOW's commitment to the use of a trenchless solution (HDD) at landfall, there is no requirement for prolonged beach closure throughout the construction phase, with restrictions limited to emergency access only.<br>A magnitude of impact of low is expected as a worst case due to the potential for indirect impacts on the enjoyment of recreational activities due to construction activities (e.g. from noise or traffic near landfall). |
| | Coastal PRoW, King Charles ECP, heritage trails and cycle routes at landfall | Low | Due to NFOW's commitment to use a trenchless solution as the construction methodology at landfall, coastal PRoW and cycle routes will remain open during the Project's construction and will not be directly affected.<br>A magnitude of impact of low is expected as a worst case due to the potential for indirect impacts on the enjoyment of recreational activities due to construction activities (e.g. from noise or traffic near landfall). |
| | Frinton Golf Club | Low | The applicant has managed with Frinton Golf Club around timings of the works and ensuring access to the course is minimised/scheduled so to minimise impact on events the golf club are running. |

| Activity | Receptor (users of…) | Magnitude | Reasons |
|---|---|---|---|
| | | | Access and ability to use the course will not be impeded by construction works. Although the golf course falls within the onshore project area, the use of trenchless techniques means that there will not be any above ground works on the golf course (although access for non-intrusive monitoring would be required). |
| | The Rock Hotel | Low | The Rock Hotel, which is located over 500m from landfall but close to an access road, may experience limited disturbance from construction traffic using the access road which could cause minor impacts on hotel guests' enjoyment of the hotel. |
| | Frinton Beach, Holland Haven Country Park and Greensward Park | Low | The Applicant has committed to install the cables at the landfall using a trenchless solution, thereby avoiding physical disturbance or prolonged access restrictions to Frinton Beach and Holland Haven. |
| | Designated bathing waters. | Negligible | The level of change to water quality is unlikely to deter visitors and tourists. |
| Cable installation | PRoW intersecting with onshore project area | Low | Tourists and visitors using routes crossing the onshore project area are likely to be able to adapt as temporary diversions will be in place and therefore will experience limited impacts. |
| | PRoW outside of onshore project area but within onshore study area | Negligible | There will be negligible impact on tourists and visitors using routes outside of the onshore project area. The PRoW will remain open and enjoyment of the PRoW will see negligible impact. |
| | Tendring Green Allotments | Low | Given the distance from the project (370m), disturbance will be limited to impacts from construction traffic. |
| Construction of onshore substation | PRoW | Low | There will be visual impact however these routes will remain open and therefore impact on enjoyment on the route will be limited. |

#### 32.6.1.1.3 Significance of effect

195. Table 32.20 below brings together the results of the assessment of receptor sensitivity and the magnitude of impact upon those receptors to determine the significance of residual effect.

**Table 32.20 Significance of impacts on key onshore recreation receptors**

| Receptor (users of…) | Sensitivity | Magnitude of impact | Significance of effect |
|---|---|---|---|
| Frinton Beach Huts | Medium | Low | Minor adverse (not significant) |
| King Charles ECP, heritage trails and cycle routes at landfall | Low | Low | Negligible (not significant) |
| PRoW | Low | Negligible to Low | Negligible (not significant) |
| Frinton Golf Club | Non-members – low<br>Members - medium | Low | Non-members – negligible (not significant)<br>Members – minor adverse (not significant) |
| The Rock Hotel | Medium | Low | Minor adverse (not significant) |
| Frinton Beach, Holland Haven Country Park and Greensward Park | Negligible | Low | Negligible (not significant) |
| Tendring Green Allotments | Medium | Low | Minor adverse (not significant) |
| Designated bathing waters. | Low | Negligible | Negligible (not significant) |

#### *32.6.1.2 Impact 2: Impact on enjoyment of marine and coastal recreational and tourism assets due to the construction of offshore infrastructure*

196. The visual impact from Wind Turbine Generators (WTG) and Offshore Substation Platform (OSP) and subsequent effect on enjoyment of marine and coastal recreational and tourism assets during the construction phase are anticipated to build up over time and are assumed to be no greater than the operational effects when the offshore infrastructure is fully constructed. This is not assessed separately and instead the detailed assessment of the infrastructure is covered under operational effects in Section 32.6.2.2. The construction impact assessment therefore focuses on:

- The temporary effect of construction vessels on marine and coastal tourism and recreational users of the coastal and offshore areas.
- The temporary effect of physical obstructions and displacement of people engaging in marine tourism and recreational activities. These activities include marine construction vessel movements; the HDD exit works in the subtidal zone (1 to 8m water depth) in the nearshore; seabed preparation, cable laying (export, interconnector and array cables), foundation installation; and installation of WTGs and the OSPs, including the use of jack-up barges and anchored vessels

197. While impacts could occur on passenger vessels such as the Stena Lines ferries between Harwich and Hook of Holland, any impacts on shipping and navigation will be mitigated to tolerable levels (see ES Chapter 15 Shipping and Navigation (Document Reference: 3.1.17)). Therefore, there is no pathway for effect on tourists as a result of impacts on ferries and this is not considered further in this assessment. The socio-economic impact on shipping receptors, such as ferries is assessed in ES Chapter 31 Socio-economics (Document Reference: 3.1.33).

198. Receptors that may be affected by impacts on the coast include, recreational users, visitors and tourists:

- Engaging in marine activities, such as fishing, sailing, boat tours and water sports (e.g. paddleboarding, kitesurfing, windsurfing, and wingfoiling);
- At coastal destinations, such as Clacton-on-Sea, Frinton-on-Sea, local beaches, golf courses, bathing waters and sites designated for nature conservation; and
- Using coastal PRoW and other non-motorised routes.

199. Scuba diving receptors are unlikely to be present in the marine and coastal study area and are therefore not considered in the assessment below.

#### 32.6.1.2.1 Sensitivity of receptors

200. Most recreational and tourist asset users outlined above are likely to have a low level of sensitivity to the construction of North Falls. Due to their mobility, people engaging in marine tourism and marine recreational activities are likely to be able to re-route away from construction activities without significantly losing their amenity value and are therefore deemed to be of low sensitivity to the visual impacts and disruptions from offshore works.

201. The temporary presence of construction vessels in the nearshore could be visible from the seafront, for example at the beach huts, paths and golf course close to Frinton-on-Sea. Most visitors drawn to these destinations for activities such as walking, playing golf and swimming, are unlikely to be deterred by increased vessel numbers and are therefore also deemed to be of low sensitivity to visual impacts of offshore works.

202. However the King Charles III England Coast Path and NCN Route 150 have national status and therefore its users are considered to have a medium sensitivity.

203. In addition users of coastal recreation and tourist destinations within and close to the landfall are of medium sensitivity as they are potentially impacted by both offshore and onshore impacts and may therefore have a greater awareness of construction activities.

#### 32.6.1.2.2 Magnitude of impact

204. Visual impacts from construction vessels will be short term, transient, and reversible. During shipping surveys (see ES Chapter 15 Shipping and Navigation (Document Reference: 3.1.17)), the average recorded number of unique vessels per day in the summer was 147 and was 134 in the winter.

205. Overall, there will be up to 2,532 vessel movements during the construction phase. The maximum number of vessels in the offshore project area at any one

time would be 35, with the majority in the array area, 40km from the coast (at the closest point). ES Chapter 15 Shipping and Navigation (Document Reference: 3.1.17) shows the majority of recreational marine users are in the nearshore. This level of increased vessel activity is therefore unlikely to cause a change in visitor and tourist behaviour.

206. Physical disruptions that may occur during the construction phase will be temporary and localised around the areas of activity. As part of embedded mitigation, North Falls has committed to apply for offshore safety zones of around any structure where construction is ongoing. Advance warning and accurate location details of construction works, safety zones, and advisory passing distances would also be communicated via Notices to Mariners, Kingfisher Bulletins and other appropriate media. Consultation with the Marine Management Organisation (MMO) and the Maritime and Coastguard Agency (MCA) will ensure compliance with national and international maritime regulations. It will therefore be possible for marine users to transit through the offshore project area, between areas of activity and therefore the spatial extent of impacts on marine tourism and recreational users will be localised. Impacts on shipping and navigation safety set out in the ES Chapter 15 Shipping and Navigation (Document Reference: 3.1.17) are mitigated to broadly acceptable to tolerable levels).

207. It is therefore expected that the magnitude of impact on enjoyment of marine and coastal recreational and tourism assets due to the construction of offshore infrastructure will be low for people engaging in marine tourism and recreational activities offshore and negligible for users of coastal tourism and recreation assets (including golfers, beach users and walkers using coastal paths).

#### 32.6.1.2.3 Significance of effect

208. Given the assessment of low-medium sensitivity and negligible-low magnitude of impact, the resultant effect of construction impacts on recreational users and visitors engaging in marine tourism and recreational activities and those visiting coastal tourist destinations is Negligible and thus not significant in EIA terms.

### *32.6.1.3 Impact 3 Reductions in tourist accommodation availability due to a non-resident workforce*

209. The analysis of socio-economic impacts related to construction employment in ES Chapter 31 Socio-economics (Document Reference: 3.1.33) has shown that across the construction phase, construction activities related to North Falls has the potential to support 280-310 direct and indirect UK FTE jobs per annum related to onshore works (including landfall). During peak construction, demand for onshore workers has been determined to be a total of 471 workers under worst case assumptions. This comprises 326 workers for landfall and onshore cable route works and a further 145 for onshore substation works.

210. As part of embedded mitigation and North Fall's commitment to maximising local economic benefits, North Falls is working with local partners to help maximise the employment of local workers during the Project's construction and operation phases. Further detail is provided in the Outline Skills and Employment Plan (Document Reference: 7.18).

211. As outlined in Section 32.5, overnight stays form a considerable portion of tourism demand within Essex (around 16.5% during pre-pandemic years) and

thus any disruptions to tourists' ability to seek out accommodation within the area could lead to a subsequent impact on the broader tourism economy. While an increase in demand for local temporary accommodation by a non-resident workforce may be welcomed by businesses due to the extra guaranteed bookings, it could also potentially lead to some displacement of tourists, especially during the high seasons such as the summertime where hotel occupancy rates are around 80% (Visit Britain, 2016).

212. Up to 420 direct and indirect UK FTE jobs will be supported by the offshore works. For this assessment, it is assumed that offshore workers can be accommodated on construction vessels. Onshore workers, including those involved in landfall construction, are expected to be accommodated near the onshore project area.

213. It is expected that non-resident workers would be prepared to travel up to 45 minutes to reach construction sites. Therefore, in addition to the Tendring District accommodations in neighbouring areas are also considered to be within reach. These include Colchester Borough, Maldon District, and Braintree District in the county of Essex and Ipswich Borough, Babergh District, and East Suffolk District in the county of Suffolk. However, with the exception of Colchester Borough, Tendring District, and Babergh District, and Ipswich Borough, not all accommodations within these districts or boroughs may be within a 45-minutes radius of the onshore project area. The granularity of data provided by Visit Britain's 2016 Accommodation Stock Audit is not high enough to determine where each accommodation is specifically located within each district or borough. For these neighbouring districts and boroughs, it is estimated that 30% of the bedspace stock (Table 32.17) is within range of the onshore project area.

214. Lastly, it is assumed that the non-resident workforce may stay in either serviced or non-serviced accommodation. Past experience from other energy NSIPs (Sizewell B and Hinkley Point C) shows that use of latent accommodation (renting of spare rooms using third party sites such as Gumtree, Facebook or SpareRoom.com) is also an option for non-local construction workers, although this is more likely for projects with a very large workforce requirement (such as nuclear construction projects). Under a worst case assumption, each construction worker is also expected to be accommodated separately, occupying one room and one bedspace each.

215. Displacement of tourists due to reductions in accommodation availability could be avoided by engaging larger hotel businesses in urban centres away from coastal areas such as Colchester and Ipswich. As part of community engagement, coordination with local businesses will be undertaken, and if required an accommodation plan could be co-developed and implemented to reduce displacement if considered favourable.

#### 32.6.1.3.1 Sensitivity of receptors

216. For hoteliers and accommodation providers, this will be a positive effect, and because of market forces, the supply could also adjust in response to demand (e.g. through Airbnbs). Visitors also have a large amount of choice of accommodation across the Essex and East Suffolk coast should preferred accommodation (which may be accommodation which is affordable and closer

to North Falls onshore construction project) become fully occupied. Therefore the sensitivity of reductions in tourist accommodation is assessed as low.

#### 32.6.1.3.2 Magnitude of impact

217. As shown in Table 32.16 and Table 32.17, there are a total of 2,506 serviced accommodation rooms and 5,742 bedspaces in Essex and 2,037 rooms and 4,465 bedspaces in Suffolk that are considered to be within reach of the onshore project area. Thus, a total of 4,543 rooms and 10,207 bedspaces are available within the area. A breakdown of these figures by districts and boroughs can be seen below in Table 32.21.

218. As discussed above, under a high season scenario, hotel occupancy rates are around 80% (Visit Britain, 2016) and therefore there is likely to be some capacity to adapt to increased demand.

**Table 32.21 Breakdown of accommodation availability around the onshore project area**

| District / Borough | Number of serviced rooms | Number of serviced bedspaces | Number of non-serviced rooms | Number of non-serviced bedspaces |
|---|---|---|---|---|
| **Essex County** | | | | |
| Colchester Borough | 1,200 | 2,595 | 498 | 26,597 |
| Tendring District | 929 | 2,306 | 644 | 2,564 |
| Maldon District | 153* | 310* | 143* | 347* |
| Braintree District | 224* | 531* | 8* | 25* |
| **Suffolk County** | | | | |
| Ipswich Borough | 847 | 1,884 | 3 | 21 |
| Babergh District | 838 | 1,871 | 86 | 465 |
| East Suffolk District | 349* | 739* | 667* | 2,051* |
| * Figures are conservative estimates, assuming 30% are within reach of the onshore project area | | | | |

219. Peak construction demand for onshore workers has been determined to be a total of 471 workers, 429 of which are assumed to be non-local workers (worst case assumptions).

220. Peak construction demand could increase demand for bedspaces in the area by up to 1.0%, while the demand for rooms could rise up to 6.5%. Under a high season scenario where hotel occupancy rates are around 80% there would still be 1,318 rooms available in the area, which is sufficient to accommodate the peak construction demand with a spare capacity of 889 rooms. The magnitude of impact is therefore determined to be negligible. The nature of the impact is temporary and variable, depending on the holiday season and the hotel occupancy rate. It is also likely to be localised around urban centres or other areas with high density of accommodation.

#### 32.6.1.3.3 Significance of effect

221. The resultant effect of reductions in tourist accommodation availability due to a non-resident workforce during the construction phase is therefore anticipated to be negligible, which is not significant in EIA terms.

### *32.6.1.4 Impact 4 Impact on the volume and value of tourism due to construction*

222. This assessment considers the extent to which the volume and value of tourism within the marine and coastal local study area and Tendring may be affected by construction activity (both onshore and offshore) of North Falls. The assessment focusses on the visitor economy of the marine and coastal study area.

223. To explore the temporary impacts on the local tourism economy during the construction phase due to tourist perceptions of OFW's, a literature review is provided in Section 32.5.6. The review covers research examining the relationship between the development and operation of OFW's and their associated infrastructure and an area's tourism value both pre- and post-development.

224. The relationship between visitors' attitudes to wind farm developments, their construction (i.e. construction of onshore and offshore infrastructure) and the consequences upon visitors' behaviours is complex.

#### 32.6.1.4.1 Sensitivity

225. As noted in Section 32.5, the tourism industry is important for supporting employment and the local economy across Essex (and in particular in Tendring) and East Suffolk.

226. The tourism policy review conducted in ES Chapter 32 Tourism and Recreation, Section 32.4 (Document Reference: 3.1.34), highlights the key role the sector is anticipated to play in supporting growth of the local economy. Data presented within Section 32.5.2 shows that tourism is an important sector of the coastal economies of Essex and East Suffolk and also makes up a high proportion of jobs and economic value.

227. On the basis of the above, the sensitivity of the volume and value of tourism is therefore assessed as high.

#### 32.6.1.4.2 Magnitude of impact

228. Overall, the research described in Section 32.5.6 suggests that activity related to the construction of onshore and offshore infrastructure of OFW developments does not have a significant effect on the overall volume of and value of tourism activity. In most instances, the available research (such as studies by University of the West of England (2004); Ipsos MORI (2014) and Glasgow Caledonian University (2008)) suggests that visitors do not expect their behaviour to be influenced (either positively and/ or negatively) by the presence of construction activity related to wind farm developments.

229. A more recent study by Biggar Economics (2020) was undertaken for input into the examination of the Scottish Power Renewables East Anglia ONE North and East Anglia TWO Offshore Windfarms (OWF). The study suggests that based on its analysis of 11 areas with OFW's located within 40km of the shoreline (including Norfolk Coast National Landscape, which is linked to multiple OWF and located along the East Anglia coast), there is no evidence that points to a

relationship between the construction of OFW's and an overall reduction in tourism activity, visitor spending or tourism-related employment.

230. An assessment of the characteristics of visitors is presented in Section 32.5.3. This relies upon limited local survey evidence on visitor characteristics such as the demographic profiles of visitors. Overall, the survey analysis of visitor characteristics implies there is no evidence that the characteristics of visitors to Suffolk and Essex would make them more sensitive to OFW's development compared to visitors to other similar coastal areas across the UK.

231. The assessment of construction phase impacts 1-3 (Sections 32.6.1.1 to 32.6.1.3) above finds no significant effects on the enjoyment of tourism and recreation assets or on reductions in tourism accommodation.

232. It is assumed that the impact on the volume and value of tourism during North Falls' construction is indirect and temporary in nature.

233. On the basis of the analysis outlined above, the magnitude of impact of construction activity on the volume and value of tourism is assessed as negligible.

#### 32.6.1.4.3 Significance of effect

234. With the sensitivity of the receptor assessed as high, and the magnitude of impact assessed as negligible, the effect of North Falls is assessed as minor adverse, which is not significant in EIA terms.

### 32.6.2 Likely significant effects during operation

235. During operation, it is expected that there will be no further requirement for land to be disturbed or excavated, except in the event that onshore cables require repair or maintenance or the onshore substation access works needing to be reinstated. However, these activities would not extend beyond the construction footprint assessed above, and for the former would be relatively rare and localised in occurrence. For the latter, the haul road required to access the onshore substation, required in the unlikely event of transformer failure, would potentially be in place for up to 7 months, but its location would be over land already disturbed during construction. As such, direct and indirect physical impacts on ecological receptors during operation have been scoped out of further assessment, as impacts would have already occurred during the construction phase.

#### *32.6.2.1 Impact 1 Impact of operational activity of onshore infrastructure on the enjoyment of tourism and recreational assets*

236. Once constructed and fully commissioned, the only onshore surface infrastructure during North Fall's operational phase will be the TJB manhole covers giving access to the joint bays and the onshore export cable within them, and the onshore substation. The surface of the onshore cable route will have been reinstated to its former use.

237. As set out within the realistic worst case scenario (see Table 32.2) and proposed embedded mitigation (see Section 32.3.3), the onshore export cables are designed to avoid maintenance throughout their operational life. Unplanned maintenance associated with the onshore cable may involve the repair of

onshore cable faults. This is extremely rare (indicatively one to two events per lifetime).

238. Inspection of the onshore export cable can be undertaken at the link boxes and will not require excavation or other disruptive works.

239. For these reasons this assessment is primarily focused on the onshore substation.

#### 32.6.2.1.1 Sensitivity of receptors

240. The sensitivity of the onshore recreation and tourism receptors during the operational phase of North Falls remains unchanged from that assessed during the construction phase (see Section 32.6.1.1) and is therefore assessed as negligible to medium depending on the receptor.

#### 32.6.2.1.2 Magnitude of impact

241. The only receptor category that has the potential to be visually affected during the operation phase are visitors using onshore PRoW and non-motorised routes within the ZTV of the onshore substation. The numbers of people engaging in tourism and recreation within the ZTV of the onshore substation is very low in the context of onshore study area.

242. The usual permanent level of magnitude of impact is considered to be negligible, given that visual and noise impacts are highly localised around the onshore substation.

243. However, if repairs to the cable are needed, these can usually be executed via the link boxes. In the unlikely event that excavation was required in the vicinity of the fault, this would entail no greater impact than during the construction phase and a limited disruption period. In this case, the magnitude of impact of any repair work is predicted to be low and temporary/one off.

#### 32.6.2.1.3 Significance of effect

244. Given that the sensitivity of receptors is assessed as negligible-medium and the magnitude of impact is assessed as negligible-low, the likely significant effect is at most minor adverse and thus not significant in EIA terms.

### *32.6.2.2 Impact 2 Impact of operational activity of offshore infrastructure on the enjoyment of tourism and recreational assets*

245. The indicative operational lifetime of North Falls is 30 years. The overall operational strategy will be finalised once an operational base for North Falls is selected and the Project's technical specifications confirmed. The socio-economics assessment (ES Chapter 31 Socio-economics (Document Reference: 3.1.33)) is based on the assumption that the operational base will be located within either Suffolk or Essex.

246. Overall, it is anticipated that maintenance activities will fall into two categories, preventative and corrective. Preventative maintenance will be carried out according to regular scheduled services, whereas corrective maintenance covers unexpected repairs, components replacement, retrofit campaigns and breakdowns.

247. The offshore project description notes that the total number of annual vessel movements is estimated to be 1,222. The majority of these trips (around 1,095

trips) will be via small O&M vessels (e.g., crew transfer vessels) which will allow for preventative maintenance (rather than the replacement/ repair of key components). In addition, the offshore project description indicates that up to four export cable repairs and five repairs of the array cable may be needed throughout the Project's lifetime, which may lead to reduced amenity and access to the offshore area.

#### 32.6.2.2.1 Sensitivity of receptors

248. The sensitivity of offshore recreation receptors during the operational phase of North Falls remains unchanged from that assessed during the construction phase (see Section 32.6.1.2) and is therefore assessed as low and medium for the King Charles III England Coast Path and NCN Route 150.

#### 32.6.2.2.2 Magnitude of impact

249. When replacement of larger components is required, jack up vessels and/ or special operation vessels may be needed, often requiring the implementation of a safety zone. In the majority of cases, preventative maintenance can be undertaken via normal service vessels.

250. ES Chapter 29 Offshore Seascape, Landscape, and Visual Impact Assessment (Document Reference: 3.1.31) predicts at a number of significant effects on onshore viewpoints, representing high-sensitivity visual receptors with a clear coastal outlook, located within 42km of the array area. Beyond this distance, effects experienced by all visual receptors are predicted to fall below the level of significance. This being said, significant residual visual effects at six out of the 16 representative viewpoints, which are all of moderate significance. These significant effects can be found at Viewpoint 8 Orford Ness, Viewpoint 9 Shingle Street, Viewpoint 10 Pulmahite Cliffs (Bawdsey Manor), Viewpoint 11 Felixstowe Seafront Gardens, Viewpoint 12 Landguard Fort and Viewpoint 13 Naze Tower. The residual effects on the remaining eight viewpoints are minor and thus not significant in EIA terms. The residual effect on the Suffolk Coastal Path is predicted to be significant (moderate adverse) between Butley River and Landguard Point, not significant elsewhere.

251. Although some significant visual effects are anticipated, visual amenity offered by an area is not the sole decisive factor for tourists and users of recreational assets.

252. There will also be a requirement for O&M vessel movements and maintenance works within the offshore project area. It is considered unlikely that these temporary activities would affect the behaviour of visitors to the coast and those engaging in marine tourism and recreational activities.

253. Despite the long term duration and regional spatial extent, the impact on enjoyment of recreational and tourism assets will be Negligible.

#### 32.6.2.2.3 Significance of effect

254. Given the Low sensitivity and Negligible magnitude, the resultant effect of operational activity on offshore infrastructure on the enjoyment of tourism and recreational assets is Negligible and thus not significant in EIA terms.

#### *32.6.2.3 Impact 3 Reductions in tourist accommodation availability due to a non-resident workforce*

255. The overall operational strategy would be finalised once an O&M facility for North Falls has been selected, which is likely to be decided post-consent. The facility is assumed to be based at a service port within Essex or Suffolk and would also include an office, a storage or warehouse facility, and a quayside loading area. It is anticipated that the majority of the direct O&M workers would be members of the local community (and reside in Essex or Suffolk) and would thus not require temporary accommodation during routine O&M activities. Furthermore, the onshore substation would not be manned, and non-resident personnel would only be mobilised during major maintenance works.

##### 32.6.2.3.1 Sensitivity of receptors

256. For the reasons set out within Section 32.6.1.3.1 the sensitivity of reductions in tourist accommodation is assessed as low.

##### 32.6.2.3.2 Magnitude of impact

257. The analysis of socio-economic impacts related to operational employment in ES Chapter 31 Socio-economics (Document Reference: 3.1.33) has shown that O&M activities related to North Falls has the potential to support around 3 UK FTE jobs related to onshore works (including landfall), while 110-190 UK FTE jobs will be supported by works to offshore infrastructure. Given that peak O&M demand is likely to be minimal compared to the construction phase and NFOW's commitment to maximising local employment (see Outline Skills and Employment Plan), a negligible magnitude of impact on tourist accommodation availability is predicted.

##### 32.6.2.3.3 Significance of effect

258. Given the low sensitivity and Negligible magnitude, the resultant effect of operational activity on reductions in tourist accommodation availability due to a non-resident workforce is negligible and thus not significant in EIA terms.

#### *32.6.2.4 Impact 4: Impact on the volume and value of tourism during operations*

259. Once fully constructed and commissioned, the main source of potential visual effects are from the presence of the offshore infrastructure, onshore substation and the associated above ground structures located within the onshore substation works area. The onshore export cables will be completely buried underground for its entire length where practicable. The only source of potential visual effects along the final onshore cable route is from the above ground link boxes at jointing bays, which are small in size and will be located at field boundaries and fence lines to minimise any visual effects.

##### 32.6.2.4.1 Sensitivity

260. The sensitivity of the tourism economy, once North Falls is operational, will be the same as that identified during the construction phase (see Section 32.6.1.4.1). As such, the sensitivity of the receptor is assessed as high.

##### 32.6.2.4.2 Magnitude of impact

261. The analysis presented in Section 32.5.6 and further noted in Section 32.6.1.4 suggests that wind farm developments do not have a significant effect on the overall volume and value of tourism activity.

262. The assessment of operation phase impacts 1-3 (Sections 32.6.2.1 to 32.6.2.3) above find no significant effects on the enjoyment of tourism and recreation assets or on reductions in tourism accommodation.

263. Overall, the magnitude of impact from the operational phase of North Falls on the volume and value of tourism economy is unlikely to be greater than during the construction phase. This is due to the greater level of activity during the construction phase that could impact on tourism volume and value.

264. On this basis the magnitude of impact on the volume and value of tourism during operation is assessed as negligible.

#### 32.6.2.4.3 Significance of effect

265. With the sensitivity of the receptor assessed as high and the magnitude of impact assessed as negligible, the effect of North Falls' operational activity on the receptor is of minor adverse significance, which is not significant in EIA terms.

266. It is assumed that the operational effect of North Falls is long term, indirect and reversible in nature.

### 32.6.3 Likely significant effects during decommissioning

267. This section describes the likely significant effects associated with the decommissioning of the onshore and offshore infrastructure with regards to tourism and recreation. Further details are provided in ES Chapter 5 Project Description (Document Reference: 3.1.7).

268. It is generally accepted that industry good practice, rules, and legislation change and develop over time. As a result, no decision has been made regarding the final decommissioning policy for the onshore export cables. However, the most likely scenario is that the cables would be pulled through the ducts and removed, with the ducts themselves sealed and capped and left in-situ.

269. In relation to the onshore substation, the programme for decommissioning is expected to be similar in duration to the construction phase. The detailed activities and methodology would be determined later within the Project lifetime. Whilst details regarding the decommissioning of the onshore substation are currently unknown, considering the worst case scenario, which would be the removal and reinstatement of the current land use at the site, it is anticipated that the impacts would be similar to or less than those during construction.

270. Offshore decommissioning activities are likely to include the removal of all WTG and OSP components and part of the foundations that are above seabed level. Cable and scour protection would likely be left in situ, while buried cables may be cut at the ends and left in situ.

271. As an alternative to decommissioning, the owners may wish to consider re-powering the wind farm. Should the owners choose to pursue this option, this would be subject to a new consenting application.

272. The decommissioning process is generally the reverse of the installation process during construction. Thus, it is assumed that the residual effects during the decommissioning phase would mirror the Project's construction phase, as a worst case scenario.

273. No residual effects to tourism and recreation greater than those assessed during the construction phase are anticipated, thus the highest degree of significance expected is minor adverse, which is not significant in EIA terms. Mitigation measures similar to those proposed during the construction phase would also be expected to be adopted for the decommissioning phase.

274. Once decommissioned, the development is expected to have no ongoing effect on tourism and recreation in the region.

## 32.7 Potential monitoring requirements

275. No monitoring associated with tourism and recreation is proposed. This is because this is not a statutory obligation and there is limited evidence of impacts from other OFW's. However, monitoring of impact pathways, such as impacts related to noise and vibration, traffic and transport and shipping and navigation are required and are discussed in the relevant topic chapters.

## 32.8 Cumulative effects

### 32.8.1 Identification of cumulative effects

276. The first step in the CEA process is the identification of which residual effects assessed for North Falls on their own have the potential for a cumulative effect with other plans, projects and activities. This information is set out in Table 32.22. Only effects assessed in Section 32.6 as negligible or above are included in the CEA (i.e. those assessed as 'no impact' are not taken forward as there is no potential for them to contribute to a cumulative effect).

277. The exception to this are impacts on visitor accommodation during the construction phase because this impact has been highlighted by stakeholder (as noted in Table 32.2) and there is still potential for significant cumulative impacts due to the nature of the impact being linked to a threshold level of supply compared to demand.

**Table 32.22 Potential cumulative effects**

| Impact | Potential for cumulative effects | Rationale |
|---|---|---|
| **Construction** | | |
| Impact on users' enjoyment of recreational and tourist assets due to the construction of onshore infrastructure | Yes | Cumulative direct effects associated with disruptions to onshore tourism and recreational assets are possible if onshore construction works associated with multiple developments occur concurrently and in proximity to North Falls' onshore project area. |
| Impact on enjoyment of marine and coastal recreational and tourism assets due to the construction of offshore infrastructure | Yes | Cumulative direct effects associated with disruptions to marine and coastal tourism and recreational activities are possible if marine construction traffic and offshore construction works associated with multiple developments occur concurrently and in proximity to North Falls' offshore project area. |

| Impact | Potential for cumulative effects | Rationale |
|---|---|---|
| Reductions in tourist accommodation availability due to a non-resident workforce | Yes | Cumulative effects associated with reductions in tourist accommodation availability may occur at a regional scale if peak construction demand associated with multiple developments overlap temporally and spatially with North Falls' onshore construction programme and the high season months. |
| Impact on the volume and value of tourism due to construction | Yes | Cumulative effects arising from multiple developments in close proximity to North Falls and with temporal overlap with North Falls have the potential to affect the volume and value of visitors to Essex and Suffolk. |
| **Operation** | | |
| Impact of operational activity on onshore infrastructure on the enjoyment of tourism and recreational assets | Yes | Multiple developments in proximity to North Fall's onshore substation may be visible to visitors using nearby PRoW and other non-motorised routes.<br>Cumulative effects arising from multiple developments in proximity to North Falls have the potential impact to PRoW and other non-motorised routes. |
| Impact of operational activity on offshore infrastructure on the enjoyment of marine and coastal tourism and recreational assets | Yes | Multiple developments in proximity to North Falls' array area may be visible to visitors from shore and those engaging in marine tourism and recreational activities.<br>Cumulative direct effects associated with disruptions to marine tourism and recreational activities are possible if offshore O&M works associated with multiple developments occur concurrently and in proximity to North Falls' offshore project area. |
| Reductions in tourist accommodation availability due to a non-resident workforce | No | Due to the minimal scale of demand for accommodation during the operational phase of projects the operation of multiple offshore and onshore projects would have a minimal potential cumulative impact on the availability of visitor accommodation. |
| Impact on the volume and value of tourism during operations | Yes | The operation of multiple offshore and onshore projects could have a potential cumulative impact on the volume and value of tourism. For instance this may be through potential visual cumulative impacts of other offshore wind projects or cumulative impacts on visitor perceptions of the Essex and Suffolk coast. |
| **Decommissioning** | | |
| Decommissioning strategies have not yet been finalised. However, the cumulative effects are expected to be no greater than those of construction and therefore the four impacts above are scoped in on the basis of the scoping of cumulative effects during the construction phase. | | |

### 32.8.2 Other plans, projects, and activities

278. The second step in the cumulative assessment is the identification of the other plans, projects and activities that may result in cumulative effects for inclusion in the CEA (described as 'project screening'). This information is set out in Table 32.23 below, together with a consideration of the relevant details of each, including current status (e.g. under construction), planned construction period, closest distance to North Falls, status of available data and rationale for including or excluding from the assessment.

279. The project screening has been informed by the development of a CEA project list which forms an exhaustive list of plans, projects, and activities within the study area (Section 32.3.1) relevant to North Falls. The list has been appraised, based on the confidence in being able to undertake an assessment from the information and data available, enabling individual plans, projects and activities to be screened in or out. It should be noted that projects that are already operational are not considered in Table 32.23 because they are considered to be part of the existing environment.

**Table 32.23 Summary of projects considered for the CEA in relation to tourism and recreation (project screening)**

| Project | Status | Construction period | Closest distance from the onshore project area (km) | Closest distance from the array area (km) | Confidence in data | Included in the CEA | Rationale |
|---|---|---|---|---|---|---|---|
| **National Infrastructure Planning – OWF** | | | | | | | |
| Five Estuaries Offshore Wind Farm<br>EN010115 | Pre-application | 2027 – 2030 | Scoping area directly overlaps with North Falls' onshore project area | 0 (0.04m) | High | Yes | The onshore project area for Five Estuaries covers largely the same area as North Falls, and both array areas may be visible from shore. There is also a possibility that both projects could be constructed at around the same time. Therefore, cumulative effects on marine, coastal, and onshore tourism and recreational assets could occur. |
| East Anglia TWO Offshore Wind Farm<br>EN010078 | Approved (DCO issued in 2022) | Mid 2020s | 47 | 31.5 | High | Yes, for long term visual effects from offshore infrastructure and impact on reduction in availability of accommodation only | The onshore infrastructure for this project is not in close proximity to North Falls' onshore project area. However, cumulative visual effects on coastal and marine tourism and recreational assets could occur. |
| East Anglia ONE North Offshore Wind Farm | Approved (DCO issued in 2022) | Mid 2020s | 47 | 63..1 | High | Yes, for long term visual effects from offshore infrastructure and impact on reduction in | The onshore infrastructure for this project is not in close proximity to North Falls' onshore project area. However, cumulative visual effects on coastal and marine tourism and recreational assets could occur. |

| Project | Status | Construction period | Closest distance from the onshore project area (km) | Closest distance from the array area (km) | Confidence in data | Included in the CEA | Rationale |
|---|---|---|---|---|---|---|---|
| | | | | | | availability of accommodation only | |
| **National Infrastructure Planning – Other energy infrastructure** | | | | | | | |
| Longfield Solar Farm | Approved (DCO issued 2023) | 2024-2026 | 35 | N/A | High | No | The construction phase is unlikely to overlap with the installation and commissioning activity of North Falls and there are not likely to be any cumulative effects during the operational phase. |
| Bramford to Twinstead (electric lines project) | Examination | 2024-2028 | 14 | N/A | High | Yes | There are potential impacts on the tourism and recreation assets, visitor economy and visitor accommodation which could overlap. |
| Sizewell C Project | Approved (DCO issued in 2022) | 2023 – 2034 | 49 | N/A | High | Yes | Sizewell C Nuclear Power Station will be located in East Suffolk. Therefore it has potential to interact with some receptors, particularly effects the visitor economy and on reduction in visitor accommodation due to the overlapping construction period. |
| Bradwell B new nuclear power station<br>EN010111 | Pre-application | Predicted 9 – 12 years | 21 | N/A | High | No | Scoped out as insufficient details available about this proposal to undertake any meaningful cumulative impact assessment. |
| Norwich to Tilbury | Pre-application | 2027 – 2031 | Scoping area directly | N/A | Low | Yes | The proposed substation area for Norwich to Tilbury is in close proximity to North Falls' proposed |

| Project | Status | Construction period | Closest distance from the onshore project area (km) | Closest distance from the array area (km) | Confidence in data | Included in the CEA | Rationale |
|---|---|---|---|---|---|---|---|
| (electric lines project)<br>EN020027 | | | overlaps with North Falls' onshore project area | | | | onshore substation works area. Therefore, cumulative effects on onshore tourism and recreational assets could occur. |
| NeuConnect Interconnector | Pre-construction | 2022-2028 | 0km | 1 | High | Yes, for offshore construction effects only | The NeuConnect Interconnector bisects the North Falls export cable corridor and interconnector cable corridor and there is potential for temporal overlap of cable installation activities. Therefore, as a result of vessel presence, cumulative effects on marine tourism and recreational assets may occur during the construction phase. As the project is a submarine power cable, there is no potential for cumulative visual effects during the operation phase.<br>NeuConnect makes landfall in Kent and Germany. Thus, there is no potential for cumulative effects on coastal and onshore tourism and recreational assets. |
| Nautilus Interconnector | Pre-application | 2025-2028 | N/A | Cable route unknown | Low | No | Scoped out as insufficient details available about this proposal to undertake any meaningful cumulative impact assessment |
| Lion-Link Multipurpose interconnector | The application is expected to be submitted to | N/A | N/A | Cable route unknown | Low | No | Scoped out as insufficient details available about this proposal to undertake any meaningful cumulative impact assessment. |

| Project | Status | Construction period | Closest distance from the onshore project area (km) | Closest distance from the array area (km) | Confidence in data | Included in the CEA | Rationale |
|---|---|---|---|---|---|---|---|
| | the Planning Inspectorate in Q4 2024. | | | | | | |
| Sea Link<br>EN020026 | Pre-application | 2026-2030 | 20 | 3 | Medium | Yes, for offshore construction effects only | The emerging preferred and alternative routes for Sea Link intersects with North Falls' offshore cable corridor and there is potential for temporal overlap of cable installation activities. Therefore, cumulative effects on marine tourism and recreational assets, due to the presence of vessels, may occur during the construction phase. As the project is a submarine power cable, there is no potential for cumulative visual effects during the operation phase. |
| EuroLink Interconnector | Pre-application | N/A | N/A | Cable route unknown | N/A | Yes, for offshore construction effects only | Interconnector between UK and Netherlands. Consultation materials show the interconnector making landfall between Aldeburgh and Thorpeness. Thus, there is no potential for cumulative effects on coastal and onshore tourism and recreational assets. The potential for offshore cumulative effects will be subject to the interconnector cable route and installation programme. |
| Tarchon Energy Interconnector | Pre-application | N/A | Cable route unknown | Cable route unknown | N/A | No | The interconnector is expected to link Essex in East Anglia in the UK to a landing site at Niederlangen in Lower Saxony, Germany however the detailed environmental and technical studies have not been |

| Project | Status | Construction period | Closest distance from the onshore project area (km) | Closest distance from the array area (km) | Confidence in data | Included in the CEA | Rationale |
|---|---|---|---|---|---|---|---|
| | | | | | | | completed yet and the planning applications are not expected to be completed until 2026. Based on an indicative project time line construction may commence in 2027 and the project may be commissioned in 2030. Therefore there is potential for cumulative impacts to occur however there is currently a lack of information to conduct the cumulative assessment for this project. |
| Rivenhall IWMF and Energy Centre<br>EN010138 | Application accepted for examination (08.12.23) | Information unavailable | 27 | N/A | High | No | No tourism or recreation assessment has been undertaken, indicating that there is no potential for cumulative effects. |
| **Marine aggregate exploration and production areas** | | | | | | | |
| Thames D aggregates production agreement area 524 | Operational since 2022 | N/A | N/A | 0 | Medium | No | Given the distance offshore (c. 65km) no impact is expected on tourism and recreation |
| Outer OTE aggregate exploration and option area 528/2 | Operational since 2017 | N/A | N/A | 8.4 | Medium | No | Sites which were operational at the time of the existing environment characterisation are a component of the baseline environment. |

| Project | Status | Construction period | Closest distance from the onshore project area (km) | Closest distance from the array area (km) | Confidence in data | Included in the CEA | Rationale |
|---|---|---|---|---|---|---|---|
| East Orford Ness aggregate exploration and option area 1809 | Operational since 2019 | N/A | N/A | 2 | Medium | No | |
| Southwold East aggregates production agreement area 430 | Operational since 2012 | N/A | N/A | 27.3 | Medium | No | |
| North Inner Gabbard aggregate production agreement area 498 | Operational since 2015 | N/A | N/A | 1.7 | Medium | No | |
| Shipwash aggregate production agreement area 507 | Operational since 2016 | N/A | N/A | 0.2 | Medium | No | |
| Longsand aggregate | Operational since 2014 | N/A | N/A | 11.7 | Medium | No | |

| Project | Status | Construction period | Closest distance from the onshore project area (km) | Closest distance from the array area (km) | Confidence in data | Included in the CEA | Rationale |
|---|---|---|---|---|---|---|---|
| production agreement area 508 | | | | | | | |
| Longsand aggregate production agreement area 509 | Operational since 2015 | N/A | N/A | 11.7 | Medium | No | |
| Longsand aggregate production agreement area 510 | Operational since 2015 | N/A | N/A | 7.3 | Medium | No | |
| North Falls East aggregate production agreement area 501 | Operational since 2017 | N/A | N/A | 13.2 | Medium | No | |
| **Other developments within onshore study area** | | | | | | | |
| Little Bromley Battery Energy Storage System, Land | Approved | Predicted to complete within 12 months of | 0.3 | N/A | High | No | The project will be operational prior to North Falls' planned construction start date. No cumulative operational effects on onshore tourism and |

| Project | Status | Construction period | Closest distance from the onshore project area (km) | Closest distance from the array area (km) | Confidence in data | Included in the CEA | Rationale |
|---|---|---|---|---|---|---|---|
| adjacent to Lawford Grid Substation Ardleigh Road Little Bromley Essex CO11 2QB | | construction commencing | | | | | recreational assets have been identified due to the lack of such assets in the area. |
| Proposed erection of three buildings, a new access and highway works, parking and servicing and hard and soft landscaping at Horsley Cross CO11 2NZ | Approved | Predicted to complete within six months of construction commencing | 0.1 | N/A | High | No | The project will be completed prior to North Falls' planned construction start date. No cumulative operational effects on onshore tourism and recreational assets have been identified due to the lack of such assets in the area. |

| Project | Status | Construction period | Closest distance from the onshore project area (km) | Closest distance from the array area (km) | Confidence in data | Included in the CEA | Rationale |
|---|---|---|---|---|---|---|---|
| **Other developments** | | | | | | | |
| A12 Chelmsford to A120 widening scheme<br>TR010060 | Pre-examination | Information unavailable | 27 | N/A | Medium | No | Scoped out as insufficient details available about this proposal to undertake any meaningful cumulative impact assessment |
| Lake Lothing Third Crossing<br>TR010023 | Approved (DCO issued 2020) | Over 2 years | 76 | N/A | High | No | The project is over 75km away from the onshore project area so is not likely have a cumulative effect on tourism and recreation. |
| Manston Airport<br>TR02002 | Information unavailable | Information unavailable | 53 | N/A | N/A | No | Operation of Manston Airport over time will not provide potential for cumulative effects. The airport is also over 50km from the onshore project area. |

### 32.8.3 Assessment of cumulative effects

280. Five Estuaries is also in its application phase, having submitted a DCO to the Planning Inspectorate for the project, which was accepted on the 22nd April 2024. Although subject to a separate DCO, Five Estuaries shares the same landfall location and onshore cable route (including Bentley Road improvement works) as North Falls, with the two projects also having co-located onshore substations within the same onshore substation works area. The two projects also have the same National Grid connection point.

281. Five Estuaries Offshore Wind Farm Limited (VEOWL) and North Falls have sought to collaborate and coordinate where practicable, which has led to collaborative design of the projects' onshore infrastructure, and also to sharing of detailed project design information. As a result, a detailed CEA for effects arising from the development of Five Estuaries can be undertaken. The CEA section of this chapter is therefore split into two sections:

- the first describing a detailed CEA covering effects predicted to arise from development of Five Estuaries and North Falls;
- the second, detailing effects predicted to arise from the development of Five Estuaries, North Falls and other projects.

282. The latter section will be based on the project information available for each scheme in the public domain, and by definition is therefore less detailed than the Five Estuaries and North Falls CEA section. A summary, which details overall cumulative effects arising from the development of North Falls, Five Estuaries and other projects, is then provided in Section 32.8.3.2.

283. Full details on the approach to CEA used within this chapter are set out in ES Chapter 6 EIA Methodology (Document Reference: 3.1.8).

#### *32.8.3.1 Five Estuaries Offshore Wind Farm*

##### 32.8.3.1.1 Realistic worst case scenario

284. Using the design information provided by VEOWL [and checked/updated against the submission of the Five Estuaries ES] a realistic worst case cumulative scenario has been developed for the purpose of this chapter.

285. This considers three potential cumulative build-out scenarios, as outlined in ES Chapter 5 Project Description (Document Reference: 3.1.7):

- **Scenario 1:** North Falls 'Option 2' build out is progressed, and Five Estuaries Offshore Wind Limited undertakes landfall, onshore substation construction and cable pull which overlaps with North Falls equivalent works. In this scenario, onshore cable route associated works, including temporary construction compounds, accesses and haul road, all remain in place and are used by the second project during its construction.
- **Scenario 2:** North Falls 'Option 1' build out is progressed, and Five Estuaries Offshore Wind Limited undertakes landfall, onshore substation and onshore cable route construction and cable pull, all of which does not overlap with North Falls' equivalent works. There would be a gap of between 1 and 3 years between each Projects' construction. In this scenario, onshore cable route associated works, including temporary construction compounds,

accesses and haul road, all remain in place and are used by the second project during its construction.

- **Scenario 3:** North Falls 'Option 1' build out is progressed, and Five Estuaries Offshore Wind Limited undertakes a separate landfall, onshore substation and onshore cable route construction and cable pull with a multi-year (i.e. >3 year) gap between the two construction activities. In this scenario, there is no reuse in onshore temporary works between the two projects, and all onshore cable route associated works are rebuilt and reinstated in full by the second project.

286. Full details on the build out scenarios considered within this assessment are detailed in ES Chapter 5 Project Description (Document Reference: 3.1.7) and ES Chapter 6 EIA Methodology (Document Reference: 3.1.8).

287. The realistic worst case scenario for likely cumulative effects scoped into the EIA for the tourism and recreation assessment are summarised in Table 32.24.

288. Due to the greater overall impact and greater length over which impacts would occur, Scenario 3 (Independent build) is the worst case for all tourism and recreation impacts except those relating to workforce demand for accommodation, for which Scenario 1 (concurrent build) is the worst case because current build would lead to the highest peak construction workforce and therefore generate the highest demand for accommodation.

**Table 32.24 Realistic worst-case scenario of cumulative effects arising from development of North Falls and Five Estuaries Wind Farm (Scenario 3)**

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| **Construction** | | |
| Impacts relating to the landfall | Landfall HDD (temporary works) physical parameters:<br>• Maximum No. of Transition Joint Bays (TJB) = 4<br>• Individual TJB dimensions / permanent landtake = 4 x 15m, 5 x 20m for Five Estuaires<br>• Maximum HDD depth = 20m<br>• Maximum indicative length of HDD = 1.1 km<br>• HDD temporary works area = 150 x 300m<br>• Drill exit location = subtidal exit below MHWS (up to 8m depth) | Duration includes compound establishment, HDD, transition bays, and reinstatement. |
| | Duration:<br>• 13 months (of which HDD = 6 months) + 13 months (of which HDD = 6 months)<br>• HDD to include 24 hour / 7 days working where required | |
| Impacts relating to the onshore cable route | Cable route construction physical parameters:<br>• Route length = up to 24km<br>• Jointing bays = Maximum of 192 (approximately every 500m) buried below ground<br>• Joint bay dimensions = 4 x 15m<br>• Maximum cable trench depth = 2m<br>• Indicative cable route width = 72m (open cut trenching), 90m (trenchless crossings), 130m | Overall duration includes establishing / reinstating temporary construction compounds (TCCs) and haul roads, cable installation (trench excavation, duct installation, cable jointing), trenchless techniques (includes compound establishment, HDD, and reinstatement). |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| | (complex trenchless crossings), (not 80m (open cut trenching) and 130m (complex trenchless crossings))<br>• Cable construction compound dimensions = 150 x 150m (main) to 100 x 100m (satellite)<br>• No. of trenches = 4<br>• Cable trench dimensions = 3.5 – 1.2 x 2m (tapered top to bottom<br>• Haul road width = 6m wide road, 10m wide total including verges, drainage and passing places. | |
| | Trenchless crossings physical parameters:<br>• Maximum width of buried cable = 130m<br>• Maximum trenchless crossing depth = 20m<br>• HDD compound dimensions = 75 x 150m | |
| | Durations:<br>• Bentley road improvement works = 6 – 9 months<br>• Cable route works = 18 – 27 months with a 57 month gap in between i.e. 111 months start to finish [same for onshore substation]<br>• Cable installation = 12 months (per project, i.e. up to 24 months)<br>• Major HDD (each location) = 8 months (of which HDD = 4 months) (per project)<br>• Minor HDD crossings = 2 months (per project) | |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| | • Major HDD crossings to include 24 hour / 7 days working where required. | |
| Impacts relating to the onshore substation and National Grid substation connection works | Onshore substation (temporary works) physical parameters:<br>• Permanent substation footprint = 280 x 210m (North Falls) + 280 x 210m (Five Estuaries)<br>• Number of buildings = 6 (North Falls) + 8 (Five Estuaries)<br>• External equipment height (lightning masts) = 18m<br>• Construction compound footprint = 150 x 250m (North Falls) + 150 x 250m (Five Estuaries)<br>National Grid substation connection works physical parameters (for two projects):<br>• All enabling worth / platform constructed by National Grid.<br>• Cable installation works as described above<br>• Equipment may include:<br>  ○ cable sealing ends, surge arrestors, earth switch, disconnectors, circuit breakers, current transformers, voltage transformers, busbars | |
| | Durations:<br>• Substation construction duration = 21 – 27 months (per project, i.e. up to 54 months)<br>• Onshore substation O&M haul road – 7 months duration' | |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| Impacts relating to accommodation for construction personnel | In the peak month it is estimated there will be:<br>• Peak onshore cable route and landfall construction demand = 408[9]<br>• Peak onshore substation construction demand = 290[10]<br>• Total peak onshore construction demand = 698 personnel at any one time (of whom up to 91% could be non-local workers[11]) | It is expected that during standard construction works, the onshore workforce would be an average of 268 personnel over a period of 31 months. |
| **Operation** | | |
| Impacts relating to the onshore cable route | Cable corridors operational physical parameters:<br>• No. of link boxes = up to 192<br>• Link box footprint (per box) = 0.6 x 1 x 1.5m<br>• Cross-sectional area of buried cement-bound sand = 0.6m$^2$ | |
| Impacts relating to the onshore substation | Onshore substation physical parameters:<br>North Falls: | Normal operating conditions would not require lighting at the onshore substation, although low level movement detecting security lighting may be utilised for health and safety purposes. Temporary lighting during working |

[9] Based on indicative average daily personnel requirements per month (over a period of up to 36 months) for sections 1 to 7 of the cable route derived by
[10] Employment levels expected during the construction of two substations. As a worst case this is assumed to be double the North Falls alone scenario (in which only one substation is built).
[11] The share of non-local workers is based on the lifetime local and total UK content by supply chain category analysis for the worst-case scenario (see ES Appendix 31.1 (Document Reference: 3.3.70) for more information). The relevant supply chain categories for the estimation are onshore substation and onshore export cable installation.

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| | • Permanent substation footprint = 210 x 280m<br>Five Estuaries:<br>• Permanent substation footprint = 210 x 280m | hours would be provided during maintenance activities only. Low level continuous noise emissions would also be generated by the onshore substation during operation. |
| Impacts relating to the offshore array | <u>Offshore infrastructure parameters (North Falls):</u><br>• Up to 57 wind turbines<br>• Array area = 95km2<br>• Closest distance to shore = 40km<br>• Two offshore substation platforms<br>• Maximum rotor tip height = 377.4m above Mean High Water Springs (MHWS)<br>• Operational lifetime expected to be 30 years.<br><u>Offshore infrastructure parameters (Five Estuaries):</u><br>• Up to 79 wind turbines<br>• Array areas = 128km2<br>• Closest distance to shore = 37km<br>• 2 offshore substation platforms<br>• Maximum rotor tip height = 395m above Mean High Water Springs (MHWS)<br>• Operational lifetime of approximately 40 years. | |

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| **Decommissioning** | | |

North Falls

No final decision has yet been made regarding the final decommissioning policy for the onshore project infrastructure including landfall, onshore cable route, 400kV cable route and onshore substation. It is also recognised that legislation and industry practice change over time. However, it is likely that the onshore project equipment, including the cable, will be removed, reused, or recycled where practicable and the transition bays and cable ducts being left in place. The detail and scope of the decommissioning works will be determined by the relevant legislation and guidance at the time of decommissioning and will be agreed with the regulator. It is anticipated that for the purposes of a worst case scenario, the impacts will be no greater than those identified for the construction phase.

Five Estuaries

The detail and scope of decommissioning works will be determined by the relevant legislation, industry good practice and guidance at the time of decommissioning. It is anticipated that:

- The decommissioning phase would take around 3 years to complete (including both onshore and offshore elements, through driven primarily by offshore works).
- Both onshore and offshore cabling are anticipated to be left in-situ, although VE will consider the best environmental option at the time of decommissioning and any works would be subject to discussions with stakeholders and regulators, and consideration of commercial requirements. It is likely judged that removal of the cables would bring about further environmental impacts. At present it is therefore proposed that the cables will be left in-situ, but this will be reviewed over the design life of the project.
- Removal of offshore infrastructure is expected to involve the approximate reverse of the installation process and would include assessments of risk related to potential hazards and pollutants and the development of suitable procedures for mitigating this.
- Any works will require environmental impact assessment at the time to investigate the likely significant effects of the retrieval operations.
- it is considered likely that the proposed onshore substation would be removed and will be reused or recycled and that the onshore cables would also be removed and recycled, with the transition bays and cable ducts (where used) left in situ.
- Landfall infrastructure will be left in-situ where considered appropriate. Any requirements for decommissioning at the landfall will be agreed with statutory consultees.

Based on the principles above, for the purposes of a worst-case scenario, it is considered that they type of effects during the decommissioning phase would be similar to those during the construction phase, and the magnitude of effect associated with decommissioning would be no greater than those identified for the construction phase. The sensitivity of each receptor is also assumed not to change substantially.

Mitigation would take the form of mitigation identified by any environmental assessment (e.g. noise, air quality) reported within this ES, and in the form of industry good practice measures akin to the Code of Construction Practice relevant for the decommissioning phase.

| Element of the project infrastructure | Parameter | Notes |
|---|---|---|
| As such, all residual effects would be of a similar or lower significance as reported for the construction phase. | | |

#### 32.8.3.1.2 During construction

**Impact 1: Impact on users' enjoyment of recreational and tourist assets due to the construction of onshore infrastructure**

289. Visitors to onshore assets may be affected by visual impacts and disruptions from construction activities associated with North Falls and Five Estuaries.

290. Visitors to coastal assets within or neighbouring the landfall area may be affected by landfall construction associated with North Falls and Five Estuaries. However, given that both projects commit to trenchless crossing techniques at landfall and would implement best construction practices, disruptions and visual impacts to coastal assets such as NCN 150 and Frinton Golf Course would be minimised.

291. Given the low density of tourism and recreation receptors inland, it is unlikely that cumulative effects with Five Estuaries would alter the significance of effect (which was a mix of minor adverse and negligible depending on the asset type being used). Given the interconnectedness of the PRoW network and the temporary diversions and alternative route recommendations that will be implemented as embedded mitigation, it is anticipated that visitors using onshore PRoW and other non-motorised routes will still be able to make use of such assets and engage in recreational activities.

**Impact 2: Impact on enjoyment of marine and coastal recreational and tourism assets due to the construction of offshore infrastructure**

292. North Falls and Five Estuaries offshore project areas could result in potential cumulative effects on visitors and recreational users engaging in marine tourism and recreational activities such as sailing and fishing. This includes marine construction traffic and offshore construction activities associated with both projects which is within visual range of visitors on the coast.

293. In the case that offshore works occur independently (Scenario 3), the duration of impacts experienced by visitors would occur over a longer period of time and total impact would therefore be greatest.

294. The potential for significant 'total' cumulative visual effects (moderate) in sensitive viewpoint locations less than 42km from the offshore array and on the Suffolk Coast Path from a section of the path between the mouth of the Butley River and Landguard Point (19km) is acknowledged in ES Chapter 29 Offshore Seascape, Landscape, and Visual Impact Assessment (Document Reference: 3.1.31)). However these effects would be transient in nature and viewed from a distance, and therefore it is not anticipated that they would give rise to an adverse likely significant effect on the enjoyment of recreational and tourism activities.

295. The significance of effect is unlikely to change, given that few receptors have the capability to travel far enough to reach areas where offshore construction and marine construction traffic would be most concentrated. Such impacts would remain temporary and reversible in nature. Cumulative effects therefore are not anticipated to be significant in EIA terms. Any cumulative effects would, as per the project-alone assessment, be temporary and reversible in nature.

296. Therefore cumulative effects for North Falls and Five Estuaries are assessed as Negligible and thus not significant in EIA terms.

### Impact 3: Reductions in tourist accommodation availability due to a non-resident workforce

297. The largest demand for non-resident workforce would result from Scenario 1 (concurrent build).

298. The peak demand for non-resident onshore construction workforce requiring accommodation is estimated to be up to 429 workers for North Falls (32.6.1.3.2). This is based on the assumption that 91% of construction workers are non-local and require visitor accommodation and that all offshore construction workers are accommodated on offshore vessels (and therefore do not require accommodation onshore).

299. Concurrent North Falls and Five Estuaries construction increases the number of peak non-resident onshore construction workers to 698 personnel at any one time (of whom up to 91% could be non-local workers), of which 635 are assumed to require visitor accommodation.

300. Based on the supply of accommodation set out in Table 32.21 cumulative peak construction demand for North Falls and Five Estuaries could increase demand for bedspaces in the area by up to 1.5%, while the demand for rooms could rise up to 9.6%. The supply of available rooms is assumed to be 1,318 (as set out in Section 32.6.1.3) which is sufficient to accommodate the peak construction demand with a spare capacity of 682 rooms.

301. Both projects have coordinated together (for example by conducting joint local stakeholder engagement meetings) in the production of an Outline Skills and Employment Plan for North Falls (Document Reference: 7.18) and an Outline Skills and Employment Strategy for Five Estuaries (Five Estuaries document reference: EN010115/APP/9.27). The measures detailed in both of these documents are aligned and will be further developed with local stakeholders. This may help to increase the proportion of jobs accessed by local residents for both projects, which would reduce the demand for visitor accommodation.

302. Even under the peak worst case scenario it is very likely that there will be enough accommodation in the local stock and so the cumulative effect with Five Estuaries remains negligible (not significant).

### Impact 4: Impact on the volume and value of tourism

303. The EIA of Five Estuaries differs from North Falls in so far as it assessed impacts on tourism assets rather than the volume and value of tourism.

304. Given the evidence base presented in the assessment of North Falls above which overall concludes that there is no evidence that tourism economies have seen negative impacts as a result of the development of offshore wind in the UK (Sections 32.5.6 and 32.6), the cumulative visual impacts, distance from shore of Five Estuaries (37km), the cumulative effects of both North Falls and Five Estuaries are also predicted to be negligible. However it is noted that the length of the cumulative impact and visual impact are greater under the cumulative realistic worst case assessment scenario.

#### 32.8.3.1.3 During operation

**Impact 1: Impact on users' enjoyment of recreational and tourist assets due to the construction of onshore infrastructure**

305. Once fully constructed and commissioned, there is potential for long term cumulative visual effects on visitors to onshore tourism and recreational assets between North Falls and Five Estuaries, as the onshore substation will be located within close proximity to North Falls'. Therefore, visitors using onshore PRoW and other non-motorised routes in the area will experience cumulative visual effects. However, given the low density of receptors around North Falls' onshore substation works area, it is unlikely that the significance of effect would change (from the significance of effect outlined in Table 32.20, which varies from Negligible to Minor Adverse depending on the user group). Cumulative effects therefore are not anticipated to be significant in EIA terms.

**Impact 2: Impact on enjoyment of marine and coastal recreational and tourism assets due to the construction of offshore infrastructure**

306. Once fully constructed and commissioned, there is potential for long term cumulative visual effects on visitors engaging in marine and coastal tourism and recreational activities, as North Falls and Five Estuaries would add two OWFs to the seascape off the Essex coast, while East Anglia ONE North and East Anglia TWO OFW's would add another two OWFs to the seascape off the Suffolk coast. However, given the distance from shore of both projects (37 km for Five Estuaries and 40km for North Falls) the visual impact is therefore limited on coastal tourism and recreational assets such as coastal PROW and designated sites. On clear days, OWFs could occupy a wide extent of the seaward horizon. However, given the presence of existing wind farms, such as Greater Gabbard and Galloper, it is unlikely that the presence of additional wind farms would significantly influence people's visiting behaviours.

307. O&M activities are considered to be less disruptive and more intermittent, localised, and short term than their construction counterparts, thus the potential for cumulative effects is considered to be low. In the worst case scenario that offshore O&M activities occur concurrently, slight increases in navigation-related disruptions and visual impacts from O&M vessels are possible but are unlikely to change the significance of effect on users enjoyment of marine tourism and recreational activities. Cumulative effects are therefore Negligible, which is not significant in EIA terms.

**Impact 3: Reductions in tourist accommodation availability due to a non-resident workforce**

308. This will be a negligible effect as the scale of North Falls and Five Estuaries workforce requiring visitor accommodation during the operational phase is anticipated to be very limited.

**Impact 4: Impact on the volume and value of tourism**

309. The EIA of Five Estuaries differs from North Falls in so far as it assessed impacts on tourism assets rather than the volume and value of tourism.

310. As noted above the cumulative visual impact may be greater but this is unlikely to affect visitor behaviour given the evidence base presented in the assessment of North Falls above (Sections 32.5.6 and 32.6) and the distance from shore of

Five Estuaries is 37km. The cumulative effects of both North Falls and Five Estuaries are predicted to be Negligible. Embedded mitigation will be used by both projects and there are limited sensitive tourism assets inland. Cumulative effects therefore are not anticipated to be significant in EIA terms.

#### 32.8.3.1.4 During decommissioning

311. Potential cumulative effects associated with the decommissioning phase are currently unknown. However, they should be of similar nature to but no greater in terms of significance than those identified for the construction phase.

#### 32.8.3.1.5 Summary

312. Table 32.25 below provides a summary of the potential significant cumulative effects identified during the tourism and recreation CEA in relation to Five Estuaries.

**Table 32.25 Summary of the potential cumulative effects in relation to Five Estuaries**

| Potential impact | Cumulative effect | Additional mitigation |
|---|---|---|
| **Construction** | | |
| Impact 1: Impact on users' enjoyment of recreational and tourist assets due to the construction of onshore infrastructure | Varies from Negligible to Minor Adverse depending on the user group<br>Not significant | Not required as no significant effects have been identified. |
| Impact 2: Impact on enjoyment of marine and coastal recreational and tourism assets due to the construction of offshore infrastructure | Negligible, Not significant | Not required as no significant effects have been identified. |
| Impact 3: Reductions in tourist accommodation availability due to a non-resident workforce | Negligible, Not significant | Not required as no significant effects have been identified. |
| Impact 4: Impact on the volume and value of tourism due to construction | Negligible, Not significant | Not required as no significant effects have been identified. |
| **Operation** | | |
| Impact 1: Impact of operational activity on onshore infrastructure on the enjoyment of tourism and recreational assets | Varies from Negligible to Minor Adverse depending on the user group<br>Not significant | Not required as no significant effects have been identified. |
| Impact 2: Impact of operational activity on offshore infrastructure on the enjoyment of tourism and recreational assets | Negligible, Not significant | Not required as no significant effects have been identified. |
| Impact 3: Reductions in tourist accommodation availability due to a non-resident workforce | Negligible, Not significant | Not required as no significant effects have been identified. |
| Impact 4: Impact on the volume and value of tourism during operations | Negligible, Not significant | Not required as no significant effects have been identified. |

#### *32.8.3.2 North falls, Five Estuaries and other projects*

313. Based on the project screening in Section 32.8.2, in addition to Five Estuaries, six of the other listed projects will be included in the CEA for further assessment:

- East Anglia ONE North OWF and East Anglia TWO OWF – Offshore infrastructure and onshore infrastructure. Landfall will be near Sizewell to the main development area inland from Knodishall (Scottish Power Renewables 2023a);
- Sea Link – The construction of Sea Link would involve installing a new 2 GW HVDC cable link between Suffolk and Kent, approximately 145 kilometres (km) long and predominantly offshore, with onshore infrastructure located in Suffolk and Kent.
- Norwich to Tilbury – Proposal to reinforce the 400kV high voltage power network in East Anglia to include a new 400kV connection substation in the Tendring district. The East Anglia Connection Node substation is located within the North Falls Onshore project area, at its western end.
- Bramford to Twinstead – 29km linear route between the Bramford Substation, Suffolk and 1.5km south of Twinstead Tee, Essex – Construction and operation of a new double circuit electricity transmission network reinforcement of c.29km, consisting of overhead lines, underground cables, a grid supply point substation and associated development.
- Sizewell C – New 3.2GW Nuclear Power Station near Leiston in East Suffolk with two European pressurized reactors.

314. This section provides the conclusions of the CEA for North Falls, Five Estuaries and these other listed projects.

##### 32.8.3.2.1 During construction

315. Cumulative effects from Five Estuaries and other projects during construction are shown in Table 32.26.

**Table 32.26 Cumulative effects from Five Estuaries other projects during construction**

| Impacts | Overall cumulative effects |
|---|---|
| Cumulative effects on users' enjoyment of recreational and tourist assets due to the construction of onshore infrastructure | Only two of the shortlisted CEA projects assessment have spatially and temporally overlapping onshore elements:<br>• Five Estuaries<br>• Norwich to Tilbury<br>Both projects would not lead to a difference in significant of cumulative effect with North Falls. In addition:<br>• The traffic and transport assessment found cumulative effects ranging from negligible to minor adverse (not significant).<br>• The noise and vibration assessment found cumulative effects are not anticipated in relation to construction noise and vibration. However off-site construction traffic noise on Bentley Road has the potential to cause significant adverse cumulative effects. Mitigation measures are proposed for inclusion in the CTMP, and monitoring is proposed at the worst-affected property. With this mitigation and monitoring in place, significant cumulative effects are not anticipated.<br>• No significant cumulative effects are anticipated in relation the impacts on onshore air quality.<br>On this basis the significance of effect on receptors will remain a mix of negligible and minor adverse effects (not significant). |
| Cumulative effects on enjoyment of marine and coastal recreational and tourism assets due to the construction of offshore infrastructure | Only four of the shortlisted CEA projects assessment have offshore infrastructure elements and were required to be considered in detail in the CEA above:<br>• Five Estuaries<br>• East Anglia ONE North and TWO<br>• Sea Link<br>No significant effects from development of offshore infrastructure will occur when considering each project on an individual assessment basis.<br>Significant visual cumulative effects are predicted at a number of onshore viewpoints, representing high-sensitivity visual receptors with a clear coastal outlook, located within 42km of the array area. Beyond this distance, effects experienced by all visual receptors are predicted to fall below the level of significance.<br>On this basis the significance of impact will remain a mix of negligible and minor adverse effects (not significant). |

| Impacts | Overall cumulative effects |
|---|---|
| Cumulative effects on reductions in tourist accommodation availability due to a non-resident workforce | All of the projects in the shortlisted CEA will require a construction workforce, a proportion of the construction workforce is typically non-local and a proportion of that non-local workforce may be accommodated in visitor accommodation. Only the onshore workforce from OFW workers need to be considered as offshore workers are assumed to be accommodated in vessels offshore.<br><br>The following summarises the estimated scale of non-local workforce of each of the projects and the extent to which travel to work areas may overlap:<br><br>• Five Estuaries: average non-local workforce of between 260 to 300 workers onshore, the travel to work area will mirror North Falls<br><br>• East Anglia ONE North and TWO: Together demand for 196 onshore non-local workers, however a large proportion of these workers will be accommodated outside of the North Falls travel to work area.<br><br>• Sea Link: Workforce not quantified, however at this stage it is anticipated that the overlapping accommodation requirement for will be negligible as most construction activity will occur in Suffolk and Kent.<br><br>• Norwich to Tilbury: The accommodation requirement is not quantified although this may be expected to be similar to Bramford to Twinstead below (350 non-local workers, 70% of which are assumed to require serviced and non-serviced visitor accommodation).<br><br>• Bramford to Twinstead: Demand for 350 non-local workers, 70% of which are assumed to require visitor accommodation (non-serviced and serviced). Given that the closest point of the projects is 14 km from each other it is assumed that some of the construction workforce travel to work area will overlap.<br><br>• Sizewell C: Demand for 2,900 non-local workers to be based in formal (e.g. hotels and B&Bs) or latent (e.g. people's spare bedrooms) accommodation. However most demand for accommodation is likely to be focused on Suffolk and outside of the North Falls construction workforce travel to work area.<br><br>It is not possible to accurately predict exactly when the peak demand for workers for each project will occur. A worst case approach would be to assume that the peak periods for each of the projects coincide with each other. Some of these workers will be accommodated in housing however the majority are assumed to require visitor accommodation. In this scenario, there is assumed to be a total demand for in the region of 5,000 non-local workers, the majority of whom will require rooms in visitor accommodation.<br><br>Accommodation data shows that, in 2016, there was an estimated 1,318 rooms available within the North Falls travel to work zone (based on occupancy levels of around 80% in peak summer months). Once North Falls and Five Estuaries accommodation requirement is accounted for there are assumed to be a 682 spare room capacity in the study area.<br><br>Assuming occupancy rates are at 80% and all projects peak temporarily overlap and have exactly the same travel to work area and the supply would be unlikely to respond to increased demand. However the following points are important to note: |

| Impacts | Overall cumulative effects |
|---|---|
| | • in reality, the timing of the peak workforce for all projects is unlikely to overlap,<br>• some of the project's travel to work zones show a lower level of spatial overlap – North Falls has the strongest spatial overlap with Five Estuaries and Norwich to Tilbury. This would place higher concurrent increased demand on the same stock of local accommodation if the projects are built at the same time;<br>• the supply of visitor accommodation in the study area is likely to have increased since 2016. Nationally, the England hotel occupancy reports (Visit Britain, 2023c) data shows that the supply of visitor accommodation is currently at its highest level in the period from 2016 to 2022. From 2016 to 2022 the supply of visitor accommodation has increased by 5.2%. At a local level there is further evidence to support a growth in the supply of visitor accommodation as there has been slight employment growth in the accommodation sector (+3%) from 2016 to 2022 within the districts that are located within a 45 minute drive of the North Falls onshore project area;<br>• the provision of visitor accommodation is not fixed and is influenced by market forces, it is likely that the market would be able to respond if there is clear evidence of a shortfall of visitor accommodation (e.g. private households making rooms available on Airbnb);<br>• the accommodation supply above does not include all camp site accommodation, for example Colchester alone has approximately 26,500 bed spaces in tourist campsites but only 466 tourist campsite rooms, this is likely to be due to a high level of camping/tent pitch based accommodation which does not show as rooms in the data. This is important as it is known that some major developments use campsites and so this could help to address any shortfall in accommodation availability;<br>• a small proportion of the workers requiring accommodation may be accommodated in housing (rented or spare rooms) and therefore place no additional demand on visitor accommodation (assessed in ES Chapter 31 Socio-economics (Document Reference: 3.1.33)); and<br>• most of the demand comes from Sizewell C which is located a long distance (49 km) from North Falls onshore project area and therefore the majority of the area of the travel to work zones for non-local construction workers will not overlap.<br>When only considering projects with the greatest spatial overlap with North Falls (Five Estuaries and Norwich to Tilbury) then there is likely to be enough accommodation within a 45 minute drive of Five Estuaries to accommodate those projects if they are built at the same time.<br>Given the assessment above, the magnitude of impact will increase from negligible for North Falls alone to medium at most. Particularly important to this finding is the fact that the supply of visitor accommodation is flexible and can respond to an increase in demand, and the fact that there is significant capacity on campsites that has not been included. The sensitivity remains low (as |

| Impacts | Overall cumulative effects |
|---|---|
| | justified in Section 32.6). Therefore the significance of effect is minor adverse, which is not significant in EIA terms. It should be noted that whilst this effect is adverse on number of tourists staying in accommodation and the wider tourist industry catering to those visitors it is actually a beneficial impact in terms of the accommodation sector and business owners, of whom will see increased demand for their services. |
| Cumulative effects on the volume and value of tourism due to construction | None of the shortlisted CEA project assessments have found significant effects on the volume and value of tourism. The research presented in this assessment finds that, overall, the evidence points to there being no overall negative impact on tourism in the UK as a result of the development of offshore wind. In addition there are already a number of visible OFW projects which do not appear to negatively impact the growth of the tourism sector in Essex and Suffolk. Furthermore, the distance to shore of the wind farm projects considered in the CEA mean that the effects on volume and value would remain negligible. |

#### 32.8.3.2.2 During operation

316. Cumulative effects from other Five Estuaries and projects during operation are shown in Table 32.27.

**Table 32.27 Cumulative effects from Five Estuaries and other projects during operation.**

| Impacts | Overall cumulative effects |
|---|---|
| Cumulative effects on users' enjoyment of recreational and tourist assets due to the operation of onshore infrastructure | Only two of the shortlisted CEA projects assessment have spatially and temporally overlapping onshore elements:<br>• Five Estuaries<br>• Norwich to Tilbury<br>Once fully constructed and commissioned, there is potential for long term cumulative visual effects on visitors to onshore tourism and recreational assets between North Falls, Five Estuaries and Norwich to Tilbury. Therefore, visitors using onshore PRoW and other non-motorised routes in the area will experience cumulative visual effects. However, given the low density of receptors around North Falls' onshore substation works area, it is unlikely that the significance of effect would change. Cumulative effects therefore are not anticipated to be significant in EIA terms. |
| Cumulative effects on enjoyment of marine and coastal recreational and tourism assets due to the operation of offshore infrastructure | Only four of the shortlisted CEA projects assessment have offshore infrastructure elements and were required to be considered in detail in the CEA above:<br>• Five Estuaries<br>• East Anglia ONE North and TWO |

| Impacts | Overall cumulative effects |
|---|---|
| | • Sea Link<br><br>Once fully constructed and commissioned, there is potential for long term cumulative visual effects on visitors engaging in marine and coastal tourism and recreational activities, as several OWFs will be added to the seascape. However, given the distance from shore of both projects (37 km for Five Estuaries and 40km for North Falls) the visual impact is therefore limited on coastal tourism and recreational assets such as coastal PROW and designated sites. On clear days, OWFs could occupy a wide extent of the seaward horizon. However, given the presence of existing wind farms, such as Greater Gabbard and Galloper, it is unlikely that the presence of additional wind farms would significantly influence people's visiting behaviours.<br><br>O&M activities are considered to be less disruptive and more intermittent, localised, and short term than their construction counterparts, thus the potential for cumulative effects is considered to be low. In the worst case scenario that offshore O&M activities occur concurrently, slight increases in navigation-related disruptions and visual impacts from O&M vessels are possible but are unlikely to change the significance of effect on users' enjoyment of marine tourism and recreational activities. Cumulative effects therefore are not anticipated to be significant in EIA terms. |
| Cumulative effects on reductions in tourist accommodation availability due to a non-resident workforce | The number of workers requiring visitor accommodation during operations will be very limited. Cumulative effects on tourist accommodation during operations are therefore negligible. |
| Cumulative effects on the volume and value of tourism due to operation | None of the shortlisted CEA project assessments have assessed significant effects on the volume and value of tourism. The research presented in this assessment finds that overall the evidence points to there being no overall negative impact on tourism in the UK as a result of the development of offshore wind. In addition there are already a number of visible OFW's projects which do not appear to have negatively impacts the growth of the tourism sector in Essex and Suffolk and the distance to shore of the wind farm projects considered in the CEA mean that the effects on volume and value would remain negligible. In addition the tourism fund provided through Sizewell C may help to boost the growth of the tourism economy in Suffolk. |

#### 32.8.3.2.3 During decommissioning

317. Decommissioning strategies have not yet been finalised for North Falls, Five Estuaries or Norwich to Tilbury; however, the cumulative effects are expected to be the same as those of the initial construction phase.

## 32.9 Transboundary effects

318. There are no transboundary effects with regards to tourism and recreation as the onshore project area would not be sited in proximity to any international boundaries. Transboundary effects are therefore scoped out of this assessment and are not considered further.

## 32.10 Interactions

319. Several tourism and recreation receptors also fall within the scope of other assessments, and most of the impact pathways that could result in tourism and recreation effects are intrinsically linked to other environmental aspects such as noise, air quality, and visual amenity. Table 32.28 provides a summary of the principal interactions, related chapters and signposts to where those issues have been addressed in this chapter.

**Table 32.28 Tourism and recreation interactions**

| Topic and description | Related chapters (Volume 3.1) | Where addressed in this chapter | Rationale |
|---|---|---|---|
| **All phases** | | | |
| Visual impacts on the enjoyment of recreational and tourist assets and the volume and value of visitors | ES Chapter 29 Seascape, Landscape, and Visual Impact Assessment (Document Reference: 3.1.31)<br>ES Chapter 30 Landscape and Visual Impact Assessment (Document Reference: 3.1.32) | Section 32.6.1.1<br>Section 32.6.1.2<br>Section 32.6.1.4<br>Section 32.6.2.1<br>Section 32.6.2.2<br>Section 32.6.2.4 | Visual impacts associated with the Project's construction and O&M activities and the long term presence of above ground infrastructure over the Project's operational life may affect the visual amenity and therefore enjoyment of recreational and tourist assets within the area and thus its image as a tourist destination. |
| Water quality impacts on the enjoyment of recreational and tourist assets and the volume and value of visitors | ES Chapter 9 Marine Water and Sediment Quality (Document Reference: 3.1.11) | Section 32.6.1.2<br>Section 32.6.1.4<br>Section 32.6.2.2<br>Section 32.6.2.4 | Impacts such as increased sediment concentrations during the Project's construction and operation phase could lead to the deterioration of water quality, which could affect the number of visitors visiting and enjoying areas designated as bathing waters. |
| Shipping impacts on the enjoyment of recreational and tourist assets and | ES Chapter 15 Shipping and Navigation | Section 32.6.1.2<br>Section 32.6.1.4<br>Section 32.6.2.2 | Impacts such as reduced navigability and increased collision risks during the Project's construction and operation phase from marine construction and O&M traffic could |

| Topic and description | Related chapters (Volume 3.1) | Where addressed in this chapter | Rationale |
|---|---|---|---|
| the volume and value of visitors | (Document Reference: 3.1.17) | Section 32.6.2.4 | affect the attractiveness of an area to visitors engaging in marine tourism and recreational activities such as fishing, sailing, and water sports. |
| Air quality impacts on the enjoyment of recreational and tourist assets and the volume and value of visitors | ES Chapter 20 Onshore Air Quality (Document Reference: 3.1.22) | Section 32.6.1.1<br>Section 32.6.1.4<br>Section 32.6.2.1<br>Section 32.6.2.4 | Impacts such as construction dust and road traffic emissions during the Project's construction phase could deter visitors from visiting or returning to an area. |
| Impact of noise and vibration on the enjoyment of recreational and tourist assets and the volume and value of visitors | ES Chapter 26 Noise and Vibration (Document Reference: 3.1.28) | Section 32.6.1.1<br>Section 32.6.1.4<br>Section 32.6.2.1<br>Section 32.6.2.4 | Impacts such as construction noise and vibration during the Project's construction and substation noise during the operation phase could deter visitors from visiting or returning to an area. |
| Impact of disruptions due to construction road traffic on the enjoyment of recreational and tourist assets and the volume and value of visitors | ES Chapter 27 Traffic and Transport (Document Reference: 3.1.29) | Section 32.6.1.1<br>Section 32.6.1.4<br>Section 32.6.2.1<br>Section 32.6.2.4 | Construction road traffic may affect access and cause delays to visitors using the local road network, affecting the attractiveness of an area for visiting. |
| Impact of disruptions to PRoW and non-motorised routes on the enjoyment of recreational and tourist assets and the volume and value of visitors | ES Chapter 28 Human Health (Document Reference: 3.1.30) | Section 32.6.1.1<br>Section 32.6.1.4<br>Section 32.6.2.1<br>Section 32.6.2.4 | Disruptions to PRoW and non-motorised routes such as temporary closures or diversions during the Project's construction and operation phase could affect exercise and outdoor recreation behaviours among local residents, which could have public health implications. |
| Impact of non-local workers on demand for visitor accommodation | ES Chapter 31: Socio-economics (Document Reference: 3.1.33) | Section 32.6.1.3<br>Section 32.6.2.3 | Non-resident workers during construction and operation phases may require visitor accommodation. |
| **Decommissioning** | | | |
| Potential impacts associated with the decommissioning phase are currently unknown. However, they should be of similar nature to but no greater in terms of significance than those identified for the construction phase. | | | |

## 32.11 Inter-relationships

320. The impacts identified and assessed in this chapter have the potential to interrelate with each other, including potential inter-relationships between effects from the offshore and onshore project areas. The areas of potential inter-relationships between impacts are presented in Table 32.29. This provides a screening tool for which impacts have the potential to interrelate. Table 32.30 provides an assessment for each receptor (or receptor group) as related to these impacts.

321. Within Table 32.30 the impacts are assessed relative to each development phase (i.e. construction, operation or decommissioning) to see if (for example) multiple construction impacts affecting the same receptor could increase the significance of effect upon that receptor. Following this, a lifetime assessment is undertaken which considers the potential for impacts to affect receptors across all development phases.

**Table 32.29 Inter-relationships between tourism and recreation impacts - screening**

| Potential interaction between impacts | | | | |
|---|---|---|---|---|
| **Construction and operation** | | | | |
| | **Impact 1: Impact on users' enjoyment of recreational and tourist assets due to the construction/operation of onshore infrastructure** | **Impact 2: Impact on enjoyment of marine and coastal recreational and tourism assets due to the construction/operation of offshore infrastructure** | **Impact 3 Reductions in tourist accommodation availability due to a non-resident workforce** | **Impact 4 Impact on the volume and value of tourism due to construction/operation** |
| **Impact 1: Impact on users' enjoyment of recreational and tourist assets due to the construction/operation of onshore infrastructure** | | Yes – Visitors within or near the landfall compound may be affected by both activities at landfall and visual impacts arising from landfall and offshore construction. | No – Tourist may be displaced and therefore not be exposed to other impacts or would find alternative accommodation. | Yes – Impacts on users' enjoyment of recreational and tourist assets may lead them to reduce their number of visits, thus impacting on the volume and value of tourists. |
| **Impact 2: Impact on enjoyment of marine and coastal recreational and tourism assets due to the construction/operation of offshore infrastructure** | Yes – Visitors within or near the landfall compound may be affected by both activities at landfall and visual impacts arising from landfall and offshore construction. | | No – Tourist may be displaced and therefore not be exposed to other impacts or would find alternative accommodation. | Yes – Impacts on users' enjoyment of recreational and tourist assets may lead them to reduce their number of visits, thus impacting on the volume and value of tourists. |
| **Impact 3 Reductions in tourist accommodation availability due to a** | No – Tourist may be displaced and therefore not be exposed to other impacts or would find alternative accommodation. | No – Tourist may be displaced and therefore not be exposed to other impacts or would find alternative accommodation. | | Yes – reduction in the availability of accommodation may deter visits where there is a lack of available alternatives. |

| Potential interaction between impacts | | | | |
|---|---|---|---|---|
| **non-resident workforce** | | | | |
| **Impact 4 Impact on the volume and value of tourism due to construction/operation** | Yes – Impacts on users' enjoyment of recreational and tourist assets may lead them to reduce their number of visits, thus impacting on the volume and value of tourists. | Yes – Impacts on users' enjoyment of recreational and tourist assets may lead them to reduce their number of visits, thus impacting on the volume and value of tourists. | Yes – reduction in the availability of accommodation may deter visits where there is a lack of available alternatives. | |
| **Decommissioning** | | | | |
| It is anticipated that inter-relationships between impacts during the decommissioning phase would also be similar in nature to those during the construction phase. | | | | |

**Table 32.30 Inter-relationships between tourism and recreation impacts – phase and lifetime assessment**

| Receptor category | Highest significance level | | | Phase assessment | Lifetime assessment |
|---|---|---|---|---|---|
| | Construction | Operation | Decommissioning | | |
| Enjoyment of coastal tourism and recreational assets | Negligible | Minor adverse | Negligible | During construction, visitors within or near the landfall compound have the potential to simultaneously experience disruptions related to landfall construction and visual impacts arising from both landfall and offshore construction, which could compound to increase the significance level to, at most, minor adverse. This would be the case for coastal PRoW, heritage trails, and segments of the NCN 150 route and the King Charles III England Coast path that pass through the landfall compound. However, the effect would most likely be highly localised and experienced only transiently.<br><br>During operation, disruptions related to O&M works in the landfall compound are intermittent and thus have a low likelihood of interrelating with visual impacts from the long term presence of offshore infrastructure. No change in significance level is anticipated. | The combination on all receptors of the whole project lifetime, would be no greater than assessed for the phase assessment (i.e. minor adverse). Construction impacts are localised, short term, and reversible. Once construction has completed, O&M impacts will be episodic, highly localised, and temporary, with the exception of visual impacts from the long term presence of above ground/sea infrastructure, for which the effects are predicted to not be significant with respect to tourism and recreation. Decommissioning impacts are not predicted to be any worse than impacts during the construction phase.<br><br>Besides local residents, the majority of visitors are tourists whose stays are of limited duration (e.g. day trippers and holidaymakers). Thus, each visitor is unlikely to experience the Project's effects throughout its construction, operation, and decommissioning phase.<br><br>It is therefore considered that tourism and recreation effects would not combine over the lifetime of North Falls to increase the significance level of any individual effects. |
| Enjoyment of onshore tourism and recreational assets | Negligible adverse | Minor adverse | Negligible adverse | During construction, visitors using onshore PRoW and other non-motorised routes have the potential to simultaneously experience disruptions and visual impacts arising from onshore construction, which could compound to | |

| Receptor category | Highest significance level | | | | |
|---|---|---|---|---|---|
| | Construction | Operation | Decommissioning | Phase assessment | Lifetime assessment |
| | | | | increase the significance level to minor adverse. This would be limited to areas with the most disruptive works such as the use of open cut trenching. However, most visitors would be passing through the area as part of the wider PRoW or route network, thus the effect would most likely be highly localised and experienced only transiently and should not affect visitors' ability to use and enjoy PRoW and other non-motorised routes on a regional scale.<br><br>During operation, disruptions related to O&M works along the final onshore cable route and around the onshore substation works area are intermittent and thus have a low likelihood of interrelating with visual impacts from the long term presence of the onshore substation. No change in significance level is anticipated. | |
| Reduction in availability of tourist accommodation | Negligible | Negligible | Negligible | If the Project were to lead to a decrease in the volume and value of visitors this would increase the availability of accommodation. However the effect on volume and value of tourism is assessed as negligible and as such the interrelationship of this impact is negligible. No change in significance level is anticipated. | |

| Receptor category | Highest significance level | | | | |
|---|---|---|---|---|---|
| | Construction | Operation | Decommissioning | Phase assessment | Lifetime assessment |
| Impact on the volume and value of tourism due to construction/operation | Negligible | Negligible | Negligible | There is no impact predicted on the reduction in availability of accommodation during all phases which in turn will have no impact on the volume and value of the tourism economy. No change in significance level is anticipated. | |

## 32.12 Summary

322. This chapter has assessed the potential impacts of the construction, operation and decommissioning of North Falls on tourism and recreation receptors.

323. During construction, impacts to tourism and recreation are mainly predicted to be localised, temporary, and reversible.

324. During O&M, impacts related to maintenance activities would be periodic, highly localised, and of lower magnitude than assessed for construction due to the non-disruptive nature of works.

325. Long term effects associated with the presence of onshore infrastructure are predicted to be localised around the onshore substation works area.

326. Long term effects associated with the presence of offshore infrastructure are predicted to be more widespread, covering the seascape of the East Anglian waters and the Essex and Suffolk Coast. However, this is unlikely to have a significant effect on tourism and recreation, given the presence of existing OWFs and high levels of shipping activity visible within the seascape. This assessment also takes into account the findings from a literature review on perceptions of OWFs.

327. The EIA has established that visitors to marine, coastal, and onshore tourism and recreational assets could be affected a result of impacts during the construction, operation, and decommissioning phases. All tourism and recreation residual effects during these phases are assessed to be negligible or minor adverse.

328. Cumulative effects were assessed and found to be not significant without the need for additional mitigation. Residual effects are considered no greater than minor adverse i.e., not significant in EIA terms.

329. Table 32.31 summarises the likely significant effects associated with North Falls during the Project's construction, operation, and decommissioning phases. A summary of the conclusion of the CEA are provided in Table 32.32.

**Table 32.31 Summary of likely significant effects on tourism and recreation**

| Potential impact | Receptor | Sensitivity | Magnitude of impact | Significance of effect (including embedded mitigation) | Additional mitigation measures proposed | Residual effect |
|---|---|---|---|---|---|---|
| **Construction** | | | | | | |
| Impact on users' enjoyment of recreational and tourist assets due to the construction of onshore infrastructure | Members of Frinton Golf Club | Medium | Low | Minor adverse | N/A | Minor adverse (not significant) |
| | Visitors to Frinton Golf Club | Low | Low | Negligible | N/A | Negligible (not significant) |
| | Users of Frinton beach huts | Medium | Low | Minor adverse | N/A | Minor adverse (not significant) |
| | Users of PRoW and long distance trails | Low | Low | Negligible | N/A | Negligible (not significant) |
| | Users of King Charles and NCN Route 150 | Low | Low | Negligible | N/A | Negligible (not significant) |
| | Guests at the Rock Hotel | Medium | Low | Minor adverse | N/A | Minor adverse (not significant) |
| | Users of Tendring Green Allotments | Medium | Low | Minor adverse | N/A | Minor adverse (not significant) |
| | Users of Frinton Beach, Holland Haven Country Park and Greensward Park | Negligible | Low | Negligible | N/A | Negligible (not significant) |
| | Users of Designated bathing waters | Low | Negligible | Negligible | N/A | Negligible (not significant) |

| Potential impact | Receptor | Sensitivity | Magnitude of impact | Significance of effect (including embedded mitigation) | Additional mitigation measures proposed | Residual effect |
|---|---|---|---|---|---|---|
| Impact on users' enjoyment of recreational and tourist assets due to the construction of offshore infrastructure | Visitors and local people engaging in marine tourism and recreational activities offshore (recreational fishing, water sports, sailing, yachting, other recreational crafts) | Low | Low | Negligible | N/A | Negligible (not significant) |
| | Users coastal PRoW and other non-motorised routes | Low | Negligible | Negligible | N/A | Negligible (not significant) |
| | Users of King Charles and NCN Routes | Medium | Negligible | Negligible | N/A | Negligible (not significant) |
| | Users of beaches | Low | Negligible | Negligible | N/A | Negligible (not significant) |
| | Visitors to coastal golf clubs | Low | Negligible | Negligible | N/A | Negligible (not significant) |
| | Members of costal golf clubs | Medium | Negligible | Negligible | N/A | Negligible (not significant) |
| | Users of coastal parks | Negligible | Negligible | Negligible | N/A | Negligible (not significant) |
| | Users of seafront hotels | Low | Negligible | Negligible | N/A | Negligible (not significant) |
| | Users of designated bathing waters | Low | Negligible | Negligible | N/A | Negligible (not significant) |

| Potential impact | Receptor | Sensitivity | Magnitude of impact | Significance of effect (including embedded mitigation) | Additional mitigation measures proposed | Residual effect |
|---|---|---|---|---|---|---|
| Reductions in tourist accommodation availability due to a non-resident workforce | Tourists requiring temporary local accommodation | Low | Negligible | Negligible | N/A | Negligible (not significant) |
| Impact on the volume and value of tourism | Tourism economy | High | Negligible | Minor adverse | N/A | Minor adverse (not significant) |
| **Operation** | | | | | | |
| Impact of operational activity on onshore infrastructure on the enjoyment of tourism and recreational assets | Users of tourism and recreational assets | Negligible-medium (mirrors construction phase above) | Negligible-(usually)<br>When / if repairs are needed raises to low | Negligible (usually)<br>Negligible - minor adverse when / if repairs are needed | N/A | Negligible usually and-negligible - minor adverse when / if repairs are needed (not significant) |
| Impact on users' enjoyment of recreational and tourist assets due to the construction of offshore infrastructure | Users of tourism and recreational assets | Low | Negligible | Negligible | N/A | Negligible (not significant) |
| Reductions in tourist accommodation availability due to a non-resident workforce | Tourists requiring temporary local accommodation | Low | Negligible | Negligible | N/A | Negligible (not significant) |
| Impact on the volume and value of tourism | Tourism economy | High | Negligible | Minor adverse | N/A | Minor adverse (not significant) |
| **Decommissioning** | | | | | | |
| Potential impacts associated with the decommissioning phase are currently unknown. However, they should be of similar nature to but no greater in terms of significance than those identified for the construction phase. | | | | | | |

**Table 32.32 Summary of cumulative likely significant effects on Tourism and Recreation**

| Potential impact | Cumulative effect | Additional mitigation |
|---|---|---|
| **Construction** | | |
| Cumulative effect 1: Impact on users' enjoyment of recreational and tourist assets due to the construction of onshore infrastructure | Negligible (not significant) / Minor adverse (not significant) depending on the receptor (mirror Table 32.31 | N/A |
| Cumulative effect 2: Impact on users' enjoyment of recreational and tourist assets due to the construction of offshore infrastructure | Negligible (not significant) | N/A |
| Cumulative effect 3: Reductions in tourist accommodation availability due to a non-resident workforce | Minor adverse (not significant) | N/A |
| Cumulative effect 4: Impact on the volume and value of tourism | Minor adverse (not significant) | N/A |
| **Operation** | | |
| Cumulative effect 1: Impact on users' enjoyment of recreational and tourist assets due to the operation of onshore infrastructure | Negligible (usually), Negligible - minor adverse when / if repairs are needed (not significant) | N/A |
| Cumulative effect 2: Impact on users' enjoyment of recreational and tourist assets due to the operation of offshore infrastructure | Negligible (not significant) | N/A |
| Cumulative effect 3: Reductions in tourist accommodation availability due to a non-resident workforce | Negligible (not significant) | N/A |

| Potential impact | Cumulative effect | Additional mitigation |
|---|---|---|
| Cumulative effect 4: Impact on the volume and value of tourism | Minor adverse (not significant) | N/A |
| **Decommissioning** | | |
| Decommissioning strategies have not yet been finalised for North Falls, Five Estuaries or Norwich to Tilbury; however, the cumulative effects are expected to be the no worse than those of the initial construction phase. | | |

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