

BT-JAC-020631-500-0001

Bramford to Twinstead Reinforcement

Volume 5: Reports and Statements

Document 5.9: Socio Economics and Tourism Report

Final Issue A
April 2023

Planning Inspectorate Reference: EN020002

Infrastructure Planning (Applications: Prescribed Forms and
Procedure) Regulations 2009 Regulation 5(2)(q)

nationalgrid

Page intentionally blank

Contents

Executive Summary	iii
1. Introduction	1
1.1 Overview	1
1.2 Aspects Covered Within This Report	1
1.3 Scoping Report and Scoping Opinion	1
1.4 Structure of this Report	4
2. Regulatory and Planning Policy Context	5
2.1 Regulatory Context	5
2.2 Current National Policy Statements	5
2.3 Consultation Draft of the Future National Policy Statements	5
2.4 Dedham Vale AONB and Stour Valley Management Plan	6
3. Methodology	8
3.1 Study Area	8
3.2 Baseline	8
3.3 Embedded and Good Practice Measures	10
3.4 Assessment of Effects	11
4. Socio-economics	12
4.1 Introduction	12
4.2 Characteristics of the Population	12
4.3 Local Economy, Businesses, Jobs and Employment	15
4.4 Community Services	20
5. Tourism	22
5.1 Introduction	22
5.2 Tourist Economy	22
5.3 Visitor Attractions	24
5.4 Tourist Accommodation	26
6. Conclusion	29
References	30

Table 1.1 – Matters Raised in the Scoping Opinion on Socio-economics, Recreation and Tourism	2
--	---

Table 1.2 – Structure of this Report	4
Table 3.1 – Data Collection Scales	8
Table 4.1 – Population and Population Density*	12
Table 4.2 – Turnover in the Construction Sector at National and Regional Level	16
Table 5.1 – Estimated Contribution of Tourism to District Economies	22
Table 5.2 – Number of Bedspaces (VisitBritain Survey of Accommodation Stock, 2016)	26
Table 6.1 – Summary of the Assessment	29

Illustration 4.1 – Estimated Worker Numbers (Based on the Alternative Scenario)	19
---	----

Executive Summary

Purpose of this Report

National Grid Electricity Transmission plc (here on referred to as National Grid) is making an application for development consent to reinforce the transmission network between Bramford Substation in Suffolk, and Twinstead Tee in Essex.

The Scoping Report (**application document 6.5.1**) concluded that the project was unlikely to result in significant effects on Socio-economics, Recreation and Tourism, when taking into account the embedded and good practice measures. The Planning Inspectorate (on behalf of the Secretary of State) in the Scoping Opinion (**application document 6.6**) broadly agreed with the scoping out of aspects as a standalone chapter, but identified that further information, including an updated baseline, was required in some areas to support the scoping conclusion.

This report has been produced using the latest data sources available to establish an updated baseline and to provide evidence in support of the decision to scope out these aspects from the Environmental Statement (ES) and to confirm that the project at application is still unlikely to generate significant effects on socio-economics and tourism.

Recreation, including impacts on navigation and public rights of ways, was scoped back into the ES and is included in ES Chapter 12: Traffic and Transport (**application document 6.2.12**). Therefore, recreation is not discussed further within this report.

Socio-economics

The assessment presented within the report demonstrates that it is unlikely that the project would have a significant effect on the local economy, businesses, jobs, employment, and community services during construction. This is because the good practice measures set out in the Code of Construction Practice (**application document 7.5.1**) would limit adverse effects to a non-significant level. In addition, the construction activities in any particular area would be short-term and a relatively small number of construction workers would be required for the project.

It is also considered unlikely that the project would have a significant effect on the local economy, businesses, jobs or employment during operation. This is because routine operational inspections and maintenance would be of a similar order of magnitude to that undertaken on the existing 400kV overhead line (and the existing 132kV overhead line which would be removed), and no additional jobs are anticipated to be created as a result of the operational phase.

Tourism

Direct effects on visitor attractions and features were generally avoided through the project design and routing. There is potential for temporary amenity effects during construction, which could affect how tourists experience the area as a whole. However, the good practice measures set out in the Code of Construction Practice (**application document 7.5.1**) would reduce these effects to a non-significant level. In addition, effects on amenity during construction are addressed in the cumulative effects assessment presented within ES Chapter 15 (**application document 6.2.15**).

The removal of the existing 132 kV overhead line and undergrounding of the proposed 400 kV cables within the Dedham Vale Area of Outstanding Natural Beauty and parts of the Stour Valley would have a small beneficial effect on the amenity value of these features during operation as it would lead to a reduction of overhead line in these areas.

There is sufficient capacity within nearby urban settlements, including Ipswich, to accommodate expected demand for accommodation from construction workers during the construction period, taking into account the relatively small number of construction workers required for the project. Therefore, it is unlikely that there would be significant effect on tourist accommodation during construction.

No additional jobs are anticipated to be created as a result of the operational phase and therefore there would be no significant effects on tourist accommodation during operation.

Conclusion

The updated assessment confirms the conclusions presented in the Scoping Report (**application document 6.5.1**) that there are unlikely to be significant effects on socio-economics and tourism during construction and operation of the project, taking into account embedded and good practice measures.

1. Introduction

1.1 Overview

- 1.1.1 National Grid Electricity Transmission plc (here on referred to as National Grid) is making an application for development consent to reinforce the transmission network between Bramford Substation in Suffolk, and Twinstead Tee in Essex. The Bramford to Twinstead Reinforcement ('the project') would be achieved by the construction and operation of a new electricity transmission line over a distance of approximately 29km (18 miles), the majority of which would follow the general alignment of the existing overhead line network.
- 1.1.2 This Socio-Economics and Tourism Report has been produced to support the application for development consent under the Planning Act 2008. It documents the decision to scope out these aspects from the Environmental Statement (ES), including reference to the Scoping Opinion (**application document 6.6**) from the Planning Inspectorate (on behalf of the Secretary of State). Finally, it concludes that the designs at application are still unlikely to generate significant effects on socio-economics and tourism. Therefore, these aspects remain scoped out of the ES.

1.2 Aspects Covered Within This Report

- 1.2.1 This report considers socio-economics and tourism, as two aspects that were scoped out of the Environmental Impact Assessment (EIA) at the scoping stage. Recreation is not included within the report, as this was scoped back into ES Chapter 12: Traffic and Transport (**application document 6.2.12**), which discusses the impacts on public rights of way and navigation.
- 1.2.2 The report considers aspects of socio-economics including impacts to businesses, job creation and employment and on community services. The report also considers impacts on the tourist economy, services and tourism honeypot sites, including the Dedham Vale Area of Outstanding Natural Beauty (AONB).
- 1.2.3 This report does not consider whether there would be financial effects of the project on individual businesses. This is because if there was a relevant claim for compensation, this would be dealt with by negotiation and, where appropriate, the application of the Compensation Code. In addition, this report does not consider whether there would be any effects of the project on property prices as this is not a matter for assessment under the Infrastructure Planning EIA Regulations 2017.

1.3 Scoping Report and Scoping Opinion

- 1.3.1 Chapter 15 of the Scoping Report (**application document 6.5.1**) set out the scoping assessment for socio-economics, recreation and tourism. The Scoping Report assessed the potential for likely significant effects for different aspects, including potential effects on job creation and the availability of a local workforce, effects on tourism and recreation and amenity and also on navigation.
- 1.3.2 The Scoping Report (**application document 6.5.1**) concluded that the project would be unlikely to result in significant effects for any of the individual aspects within the Socio-economics, Recreation and Tourism chapter, when taking into account the embedded and good practice measures. However, the scoping assessment acknowledged that there could be significant effects when these aspects are considered cumulatively across EIA

chapters (intra-project) and in combination with other proposed developments (inter-project).

- 1.3.3 The EIA Regulations only require an assessment of the likely significant effects within an ES and the decision-making process. Therefore, in accordance with a proportionate approach to the assessment, National Grid proposed that a standalone Socio-economics, Recreation and Tourism chapter should be scoped out of the ES but that aspects would be considered within ES Chapter 15: Cumulative Effects Assessment (**application document 6.2.15**), where these have the potential to result in a significant effect.
- 1.3.4 The Scoping Opinion (**application document 6.6**) broadly agreed with the scoping out of aspects in relation to socio-economics, recreation and tourism as a standalone chapter but identified that further information was required in some areas to support this conclusion. These points are discussed in Table 1.1 and where requested, the further evidence has been provided in this report.

Table 1.1 – Matters Raised in the Scoping Opinion on Socio-economics, Recreation and Tourism

Reference/Aspect	Comment in the Scoping Opinion	Project Response
4.10.3 Electromagnetic Disturbance	The Inspectorate agrees that this matter can be scoped out of the ES on the basis that the design of the project is compliant with relevant legislation and a Certificate of Conformity will be produced. The ES should explain how any effects attributable to the project would be addressed during operation.	The provisions of the current Electromagnetic Compatibility (EMC) Regulations 2016 are met through using good engineering practice and applying the relevant technical standards. In addition, the EMC performance of the existing system has been certificated as compliant by a Competent Body following appropriate on-site testing. Therefore, the project would present no issues with television or radio interference under normal operating conditions. This is reported in the Electric and Magnetic Field Compliance Report (application document 5.2).
4.10.4-4.10.5 Socio- economics, recreation and tourism	It is noted that the baseline conditions presented in the Scoping Report utilise some historic data from 2017–2019; it is understood that there is more recent data available, which should be reviewed as part of the preparation of the ES to confirm that there are no likely significant effects.	This document provides the updated data (see Section 3.2 for a list of data sources used to establish the socio-economics and tourism baseline) and confirmation that there are no likely significant effects (Chapters 4 and 5) as a result of the new data. Limitations with the data sources used are noted throughout the report noting that different study areas and inclusion criteria may apply.

Reference/Aspect	Comment in the Scoping Opinion	Project Response
4.10.6 Effects on the local economy during construction	The Inspectorate notes that the project may source construction materials and supplies locally, which could have an impact on the local economy. The Inspectorate acknowledges the likelihood of it generating significant effects in this matter is low. However, limited information is presented about the current value of this sector and the likely contribution of the project to it. Further information should be provided to conclude that this matter would not give rise to significant effects.	Further details about the value of the construction sector locally have been added to Section 4.3 of this report. These data do not change the conclusions presented within the Scoping Report (application document 6.5.1).
4.10.14-4.10.15 Effects to planning and development during construction and operation	The ES should confirm whether there is potential for significant effects in respect of potential future access to any land falling within the Mineral Safeguarding Areas (MSA) as designated in the Essex Minerals Local Plan. If there are no likely significant effects, the Inspectorate therefore agrees that this matter can be scoped out of the ES.	Effects relating to MSA are assessed within ES Appendix 10.3: Minerals Resource Assessment (application document 6.3.10.3), which concludes that there are no likely significant effects to minerals.
4.10.16 Effects on access to community services	It would be beneficial if the ES could include confirmation of the number and capacity of healthcare facilities within the study area.	A list of healthcare facilities is included in Appendix 15.1: Cumulative Effects Supporting Information (application document 6.3.15.1).
4.10.20 Water based navigation during construction	The Inspectorate agrees that it is unlikely that works to install the trenchless crossing at the River Stour would result in significant effects to recreational users and navigation. However, the Inspectorate does not consider that sufficient information has been provided to confirm this conclusion, and the ES should include information about the number, type and frequency of users, and any closures or restriction of access that would be required and, if so, when these would be scheduled to understand the impact.	Impacts on recreation users and navigation on the River Stour are assessed in ES Chapter 12: Traffic and Transport (application document 6.2.12), which concludes that there are no likely significant effects on navigation or riverine recreation users.
4.10.23 Community service providers	The information presented on community facilities appears to be inconsistent with the baseline described in other chapters, e.g. air quality. The ES should present a consistent description of the baseline and where any additional community facilities are identified that could be subject to likely significant effects, these should be scoped into the ES.	Appendix 15.1: Cumulative Effects Supporting Information (application document 6.3.15.1), describes the community facilities within or adjacent to the Order Limits. Consistency has been checked with other chapters, such as ES Chapter 13: Air Quality (application document 6.2.13).

1.4 Structure of this Report

1.4.1 The structure of this report is outlined in Table 1.2.

Table 1.2 – Structure of this Report

Chapter	Content
1: Introduction	This chapter provides an overview of the contents of the report and linkages with other application documents including the ES (volume 6).
2: Regulatory and Planning Policy Context	This chapter identifies legislation and planning policy relevant to socio-economics and tourism.
3: Methodology	This chapter defines the study areas, baseline sources, embedded and good practice measures, and significance criteria used for the assessment of effects on socio-economics and tourism.
4: Socio-economics	This chapter considers socio-economic factors including population, the local economy, local businesses, jobs and employments, the construction sector and construction workforce. This chapter is structured per topic and summarises the existing baseline, future baseline, embedded and good practice measures, effects on socio-economic factors during construction and operation, and concludes on the potential for significant effects on socio-economic receptors as a result of the project.
5: Tourism	This chapter considers the tourism economy, tourist accommodation and visitor attractions. It is structured per topic and summarises the existing baseline, future baseline, embedded and good practice measures, effects on the tourism economy, tourist accommodation and visitor attractions during construction and operation, and concludes on the potential for significant effects on the tourism economy, tourist accommodation and visitor attractions as a result of the project.
6: Conclusion	This chapter summarises the conclusions of the report and the potential for significant effects on socio-economic factors and tourism as a result of the project.
References	List of references used in the report.

2. Regulatory and Planning Policy Context

2.1 Regulatory Context

2.1.1 The Planning Act 2008 establishes the legal framework for applying for, examining and determining applications for Nationally Significant Infrastructure Projects (NSIP) in England and Wales, such as the Bramford to Twinstead Reinforcement. The Planning Act 2008 also makes provision for the designations of National Policy Statements (NPS), which are produced by Government and set out the national policy against which NSIP proposals will be assessed by the Planning Inspectorate and determined by the relevant Secretary of State.

2.2 Current National Policy Statements

2.2.1 The two relevant NPS for the project are the Overarching NPS for Energy (EN-1) (Department of Energy and Climate Change (DECC), 2011a) and the NPS for Electricity Networks Infrastructure (EN-5) (DECC, 2011b).

2.2.2 NPS EN-1 states in paragraph 4.2.2 that the applicant should set out '*information on the likely significant social and economic effects of the development*', and show '*how any likely significant negative effects would be avoided or mitigated. This information could include matters such as employment, equality, community cohesion and well-being*'.

2.2.3 In addition, EN-1 paragraph 5.12.2 states '*Where the project is likely to have socio-economic impacts at local or regional levels, the applicant should undertake and include in their application an assessment of these impacts as part of the ES.*' This is followed by paragraph 5.12.3 which lists aspects that may need to be considered including creation of jobs, effects on tourism and impacts from influx of workers on services and facilities.

2.2.4 There is no reference to socio-economic or tourism effects within EN-5.

2.3 Consultation Draft of the Future National Policy Statements

2.3.1 The government has consulted on draft replacements of the Energy NPS, including NPS EN-1 (Department for Business, Energy and Industrial Strategy (BEIS), 2021a) and NPS EN-5 (BEIS, 2021b) in autumn 2021 and further consultation is anticipated in 2023. The drafts do not carry the weight of designated NPS but are capable of being important and relevant considerations. The drafts are broadly similar to the designated NPS but did include additional requirements in relation to the scope of socio-economics assessment.

2.3.2 Paragraph 4.2.2 of the draft EN-1 states '*To consider the potential effects, including benefits, of a proposal for a project, the applicant should set out information on the likely significant social and economic effects of the development, and show how any likely significant negative effects would be avoided, reduced, or mitigated. This information could include matters such as employment, equality, biodiversity net gain, community cohesion and well-being.*'

2.3.3 Additional text has been added to the bullets listed in paragraph 5.13.3 (formerly paragraph 5.12.3) as indicated by the italic text below:

- *‘the creation of jobs and training opportunities. Applicants may wish to provide information on the sustainability of the jobs created, including where they will help to develop the skills needed for the UK’s transition to Net Zero;*
- *the contribution to the development of low-carbon industries at the local and regional level as well as nationally;*
- *any indirect beneficial impacts for the region hosting the infrastructure, in particular in relation to use of local support services and supply chains’.*

2.3.4 In addition, paragraph 5.13.5 includes extra text which states that: *‘Applicants are encouraged, where possible, to ensure local suppliers are considered in any supply chain’.* Paragraph 5.13.6 is a new insert and states that *‘Applicants should also consider developing accommodation strategies where appropriate, especially during construction and decommissioning phases, that would include for the need to provide temporary accommodation for construction workers if required.’*

2.3.5 Paragraph 5.13.9 includes extra text which states that *‘The Secretary of State may wish to include a requirement that specifies the approval by the local authority of an employment and skills plan detailing arrangements to promote local employment and skills development opportunities, including apprenticeships, education, engagement with local schools and colleges and training programmes to be enacted.’*

2.3.6 The additional text suggests that there may be a requirement to provide additional details on commitments around skills, jobs and employment within their applications. This is considered further within Chapter 4.

2.3.7 There is no reference to socio-economic or tourism within the draft NPS EN-5 (BEIS, 2021b).

2.4 Dedham Vale AONB and Stour Valley Management Plan

2.4.1 Dedham Vale AONB partly falls within the Order Limits. Areas of Outstanding Natural Beauty are designated solely for their landscape qualities, for the purpose of conserving and enhancing their natural beauty. They are designated under Section 82 of the Countryside and Rights of Way Act 2000 to secure their permanent protection against development that would damage their special qualities. National Grid, as a statutory undertaker, has a duty under Section 85 of the Act which states *‘In exercising or performing any functions in relation to, or so as to affect, land in an AONB, a relevant authority shall have regard to the purpose of conserving and enhancing the natural beauty of the AONB’.*

2.4.2 To ensure the efficient and co-ordinated management of the AONB and Stour Valley Project Area (SVPA), a Joint Advisory Committee and Partnership (the Partnership) was formed in 1993 and is made up of a diverse range of organisations with an interest in the area. It works together to support the conservation and enhancement of the environmental, economic, and social wellbeing of the area. The Partnership produces a Management Plan every five years on behalf of the local planning authorities that operate across the Protected Landscape. The current version (Dedham Vale AONB and Stour Valley Project, 2021) covers 2021-2026. This sets out the defined natural beauty of the AONB and SVPA.

2.4.3 Since 2009, the Partnership has had an aspiration to extend the Dedham Vale AONB to cover parts of the SVPA. The AONB Partnership commissioned several studies to support

the extension, which identified an area that in the opinion of the consultant (Alison Farmer Associates) met the criteria for designation as AONB. Natural England confirmed in March 2021 that the Partnership's proposal to vary the boundary of the Dedham Vale AONB had been registered. There is no current programme available regarding consideration of the proposed extension to the Dedham Vale AONB. Further details can be found in ES Appendix 6.2: Assessment of Effects on Designated Landscapes (**application document 6.3.6.2**).

3. Methodology

3.1 Study Area

- 3.1.1 The baseline has been considered at different spatial levels depending on the aspect. The Order Limits are considered to be the extent at which direct effects of the project on socio-economic and tourism receptors are likely to occur. The wider study area encompasses the Order Limits and a further 2km extent around this. This is considered to be a suitable extent for gathering baseline data and is also used to identify the wider context of the baseline environment.
- 3.1.2 The effect of construction workers on accommodation is considered at a district/county level, as the workers are likely to seek accommodation over a wider area to benefit from wider market availability (for example, the large settlement of Ipswich) and proximity to the wider transport network, including the A12 and A14.
- 3.1.3 The study area crosses the counties of Essex and Suffolk and the local planning authorities of Mid Suffolk, Babergh and Braintree districts. Baseline data are referenced at a national, regional, county, district and in some cases a ward level, where the data are available and provide context to the existing baseline environment. Table 3.1 outlines the different scales of data sources that have been used to support the assessment.

Table 3.1 – Data Collection Scales

Geographical Scale	Description
Nation	The project is located within England. National data sources have been used to identify a national average against which to compare local data. Where data are not available for England, data for the United Kingdom (UK) have been referenced.
Region	The project is located within the East of England. Regional data sources have been used to identify a regional average against which to compare local data.
County	The project is located within the counties of Essex and Suffolk. County data sources have been used to identify a sub-regional average against which to compare local data.
District	The project is located within the Babergh and Mid Suffolk districts (Suffolk), and Braintree district (Essex). District data have been used where data are not available at ward level.
Ward	The following wards are located within the wider study area: Blakenham; Bramford; Assington; Box Vale; Brett Vale; Bures St Mary and Nayland; Copdock and Washbrook; Great Cornard; Hadleigh North; Hadleigh South; South East Cosford; Sproughton and Pinewood; Gosfield and Greenstead Green; Hedingham; Stour Valley South; and The Colnes. Limited data is available at this scale.
Lower Layer Super Output Areas (LSOA)	Small areas designed to improve the reporting of small area statistics in England and Wales. There are approximately 20 LSOAs within the wider study area. Limited data is available at this scale.

3.2 Baseline

- 3.2.1 The baseline summarises the socio-economic characteristics of the wider study area and describes features of tourism, with a focus on sites within the wider study area. Not all of

the information presented is used for the purposes of assessment; some is provided for additional context.

- 3.2.2 It is recognised that the description of baseline conditions does not list all socio-economic and land uses (including tourist features) within the study area exhaustively. However, the description includes features identified from the review of third-party data and is considered representative of the socio-economic and tourism conditions in the area.
- 3.2.3 The baseline assessment has been informed by a desk study which has drawn on the following key information sources:
- Office for National Statistics (ONS) 2021 Census data (ONS, 2022a and Nomis, 2023a; 2023b; 2023c), where available;
 - ONS annual population, business and employment surveys (ONS, 2022b; 2022c; 2022d; 2022e) and job density data (Nomis, 2023d);
 - Indices of Deprivation data (Ministry of Housing, Communities and Local Government (MHCLG), 2019);
 - District council business, tourism and recreation plans and resources (Braintree, Babergh and Mid Suffolk District Council websites, accessed 2022);
 - Visitor economy and tourism reports (Destination Research, 2019a; 2019b; 2020a; 2020b);
 - Accommodation stock audits, bedspace occupancy data and other accommodation surveys (White Young Green, 2017; Visit England, 2019 and 2022; VisitEngland and VisitBritain websites);
 - Dedham Vale AONB and Stour Valley Project Management Plan (2021) and State of the AONB Report (LUC, 2019); and
 - Online mapping applications including Google Maps, Google Earth, Department for Environment, Food and Rural Affairs MAGIC Map, and Ordnance Survey AddressBase Plus (various, accessed 2023).
- 3.2.4 In some cases, baseline data are not available at a local (e.g. ward) level; therefore, the assessment is limited by the granularity of the data available, with most data available for the districts and counties within the wider study area. In addition, some data are not updated or recorded regularly. The most recent data that National Grid is aware of have been sourced to establish the baseline and the data are considered to be sufficient for the conclusions of this chapter.
- 3.2.5 The Planning Inspectorate commented in the Scoping Opinion (**application document 6.6**) that there may be more recent data about the baseline conditions than that presented in the Scoping Report (**application document 6.5.1**) and requested that this updated data was reviewed to confirm that there are no likely significant effects.
- 3.2.6 National Grid has reviewed the references provided by consultees in response to the Scoping Report (**application document 6.5.1**). Two additional sources are referenced by Babergh and Mid Suffolk District councils in their scoping response. These were:
- Ipswich Borough and Suffolk Coastal District Retail and Commercial Leisure Town Centre Study (White Young Green, 2017); and

- The Economic Impact of Tourism (2020) Economic Impact of Tourism 2020 results (Destination Research, 2020a and 2020b).

3.2.7 The two additional sources referenced by Babergh and Mid Suffolk District Council in the Scoping Responses at the back of the Scoping Opinion (**application document 6.6**) and listed in paragraph 3.2.6 above have been incorporated into this report. It is noted that the White Young Green Study is a number of years old, however, no recent comparable data or sources have been identified and therefore the 2017 data is still referenced within this report.

3.2.8 In addition, online sources have been reviewed for data that have been published after the Scoping Report (**application document 6.5.1**) was produced. All data used has been listed in this section and is referenced in the relevant baseline text in Chapters 4 and 5 of this report.

3.2.9 It is noted that 2020, and potentially 2021 may be considered to be anomalous years for socio-economic and tourism data given the COVID-19 restrictions that applied during these years. It is also still unclear how these sectors will respond over the long term post-COVID-19. Conclusions have been drawn from the available data and reference made to potential uncertainties where identified.

3.3 Embedded and Good Practice Measures

Embedded Measures

3.3.1 Embedded measures have been identified in the design of the project. These avoid or reduce significant effects that may otherwise be experienced during construction and operation of the project. Embedded measures are those that are intrinsic to and built into the design of the project. Further details on embedded measures can be found in ES Chapter 4: Project Description (**application document 6.2.4**) and the full list of embedded measures can be found in the Construction Environmental Management Plan (CEMP) Appendix B: Register of Environmental Actions and Commitments (REAC) (**application document 7.5.2**).

3.3.2 Examples of embedded measures relevant to socio-economics and tourism include removal of 25km of the existing 132kV overhead line (EM-P02), which would reduce the magnitude of change of the new overhead line on the landscape and views, removal of 2km of the existing 400kV overhead line (EM-G01), and underground cabling through Section E: Dedham Vale AONB (EM-E01) and Section G: Stour Valley (EM-G02), which, in addition to the removal of the existing 132kV overhead line, means that compared to the existing situation (i.e. baseline) the project would result in one less overhead line within these valued landscapes.

Good Practice Measures

3.3.3 National Grid has also identified a number of good practice measures, which generally comprise measures imposed through legislative requirements or represent standard sector good practices. These include good practice measures to reduce nuisance from construction activities. The good practice measures are set out in the Code of Construction Practice (CoCP) (**application document 7.5.1**). The CoCP forms Appendix A of the part of the CEMP, which is secured under Requirement 4 of the draft Development Consent Order (DCO) (**application document 3.1**).

- 3.3.4 Examples of good practice measures identified in the CoCP (**application document 7.5.1**) that would reduce effects on the local community include GG25, which would keep members of the community and local businesses informed about the project, including providing details of any noisy activities and the start and end dates of key phasing. Other good practice measures reduce the risk of disturbance from noise, light and dust, for example GG10, GG11, GG12, GG13, GG19 and GG20.

3.4 Assessment of Effects

- 3.4.1 The potential effects on socio-economic and tourism receptors have been assessed qualitatively using professional judgement. Effects have been determined as 'significant' or 'not significant'.

4. Socio-economics

4.1 Introduction

4.1.1 This chapter considers the likelihood of the project having significant effects on socio-economic factors. It begins with a general description about the characteristics of the population which underpins the baseline assessment undertaken in relation to socio-economics. It then assesses the effects on socio-economics by looking at two different receptors:

- Effects on the local economy, local businesses and local jobs and employment: This considers the potential significant effects of construction activities and worker numbers on the local economy, employment and job creation; and
- Effects on community service providers: This considers the potential significant effects on the operation of community services, for example, increased demand due to construction workers, which could lead to delay to accessing services for local residents.

4.2 Characteristics of the Population

Existing Baseline

4.2.1 Table 4.1 provides population and population density (the number of usual residents per square kilometre) data at a national, regional and sub-regional (county, district and ward) level. The table includes the districts and wards located within the wider study area. The Order Limits cross all wards except: Blakenham; Box Vale; Great Cornard; Hadleigh North; Sproughton and Pinewood; South East Cosford; and Hedingham.

Table 4.1 – Population and Population Density*

Geographical Area	Population	Population Density
England	56,489,800	433.5
East of England (Region)	6,334,500	331.4
Suffolk (County)	760,300	200.2
Mid Suffolk (District)	102,700	117.9
Blakenham (Ward)	3,571	196.0
Bramford (Ward)	2,646	230.2
Babergh (District)	92,300	155.5
Assington (Ward)	2,656	77.4
Box Vale (Ward)	2,872	72.8
Brett Vale (Ward)	3,147	63.5
Bures St Mary and Nayland (Ward)	2,865	76.2

Geographical Area	Population	Population Density
Copdock and Washbrook (Ward)	3,233	70.1
Great Cornard (Ward)	9,948	1,532.1
Hadleigh North (Ward)	2,825	383.6
Hadleigh South (Ward)	5,933	599.7
South East Cosford (Ward)	2,663	51.2
Sproughton and Pinewood (Ward)	5,843	587.3
Essex (County)	1,503,300	434.7
<u>Braintree (District)</u>	155,200	253.8
Gosfield and Greenstead Green (Ward)	2,747	62.8
Hedingham (Ward)	6,017	191.0
Stour Valley South (Ward)	3,021	51.3
The Colnes (Ward)	6,003	165.5

*Population statistics from 2021 Census data. Sources: National, regional and district statistics (ONS, 2022a); Ward statistics (Nomis, 2023a). Population density statistics from 2021 Census data (Nomis, 2023b).

4.2.2 In 2021, the total population for the wards listed in Table 4.1 was estimated to be 65,990 (Nomis, 2023a). The population density (Nomis, 2023b) for the Bramford ward (230.2) and Blakenham ward (196.0) is higher than the population density for Mid Suffolk District (117.9), however these values are in line with the population density of Suffolk County (200.2) and lower than the population densities of East of England (331.4) and England (433.5). Population densities of the wards of Babergh District identified within the wider study area are more variable. Most wards have a lower population density than Babergh District, however four wards have a significantly greater population density than Babergh District. These are Great Cornard (1,532.1), Hadleigh North (383.6), Hadleigh South (599.7) and Sproughton and Pinewood (587.3). Great Cornard ward has the largest population and greatest population density of the wards within the wider study area, with a population density significantly greater than the regional and national averages (1,532.1 for Great Cornard, compared with values of 331.4 for the East of England and 433.5 for England). The wards of Braintree District identified within the wider study area all have lower population densities than the averages for Braintree District (253.8) and Essex County (434.7).

4.2.3 The populations of the Babergh, Mid Suffolk and Braintree districts grew by approximately 5%, 6% and 6% respectively, between 2011 and 2021. This is slightly lower than population growth estimates for Essex (8%), the East of England (7%), and England (7%) for the same years, but slightly higher than Suffolk (4%) (ONS, 2022a).

4.2.4 The age distribution for the Essex county and the Braintree district is broadly in line with the regional and national age distributions (ONS, 2022a). Suffolk county and the Mid Suffolk and Babergh districts have an older population compared with the regional and national age distribution. 23.6% of residents in Suffolk are aged 65+, 4% and 5.2% higher than the 65+ age distribution in East of England (19.6%) and England (18.4%),

respectively. The percentage of residents aged 65+ in Mid Suffolk and Babergh districts skews older, with over a quarter of the population in Mid Suffolk and Babergh districts aged 65+ (25.3% and 26.4%, respectively).

- 4.2.5 The proportion of male and female residents in the wards and districts is broadly in line with the regional and national distributions (approximately 49% male, 51% female) (Nomis, 2023c).
- 4.2.6 The Indices of Deprivation measure relative deprivation in small areas (Lower Layer Super Output Areas (LSOA)), using deprivation indicators (domains) such as income, employment, health and disability, education, skills and training, barriers to housing and services, crime, and the living environment. The Index of Multiple Deprivation (IMD) combines information from the indicators in weighted proportions to measure the overall relative deprivation for an area. Areas are ranked from 1 (most deprived area) to 32,844 (least deprived area).
- 4.2.7 There are 20 LSOA within the wider study area comprising two in Mid Suffolk (012A and 012B), 15 within Babergh (002C, 004A-E, 005A, 005C, 006A, 008E, 009A-D, 010G) and three within Braintree (002A-C). These are all ranked among the top 30% least deprived neighbourhoods, with the exception being Babergh 004A (Hadleigh), which is amongst the top 40% most deprived. Between 2015 and 2019, the relevant LSOA either became marginally less deprived relative to other small areas (i.e. their rank value increased) or stayed the same (MHCLG, Indices of Deprivation Explorer, 2019).
- 4.2.8 At a district level, the three districts are among the top 40% least deprived districts (out of 317 districts nationally). Mid Suffolk is the least deprived district in the study area and is among the top 30% least deprived districts with an IMD score of 233 (out of 317). Braintree and Babergh are among the top 40% least deprived districts with IMD scores of 203 and 212 (out of 317), respectively.
- 4.2.9 In summary, the baseline information on the population indicates that the wards within the wider study area are typically less densely populated than the district, county, regional and national averages, reflecting the rural setting of the wider study area. Those wards which are typically more densely populated are located close to large towns such as Sudbury and Ipswich. In addition, the baseline information on the population indicates that the population growth and age distribution are similar to the UK as a whole, though there is a greater proportion of the population in Suffolk county and Babergh and Mid Suffolk districts aged 65+ compared to the national age distribution. This means that the population may be more vulnerable and dependent on access to local services than a population with a higher proportion of younger people, who could be more mobile or transient. The wider study area is less deprived than the UK average and therefore does not indicate that the communities are particularly vulnerable or 'at risk' based on the IMD.

Future Baseline

- 4.2.10 The socio-economic baseline within the wider study area will be continually changing due to a number of factors, including inbound and outbound migration and changes to the regional, national and international economic climate. In the reasonably foreseeable future, resident populations within the Babergh, Mid Suffolk and Braintree districts, Suffolk and Essex counties, the East of England, and England are all projected to rise based on current trends (ONS, 2020a). The local, regional and national age distribution is projected to skew older over time, with fewer young people and a greater proportion of the population over 60 (ONS, 2020a).

Effects During Construction

- 4.2.11 Taking into account the good practice measures outlined in the CoCP (**application document 7.5.1**), for example GG25, which aim to reduce disturbance to local residents, it is unlikely that there would be a significant effect on the local population during construction of the project. While a greater proportion of the population in Suffolk county and Babergh and Mid Suffolk districts is aged 65+ compared to the national age distribution, access to community services would not be directly affected by the project (see Section 4.4).

4.3 Local Economy, Businesses, Jobs and Employment

Existing Baseline

- 4.3.1 The wider study area is predominantly rural. Ipswich and the market town of Sudbury both lie outside of the wider study area, as they lie approximately 3km to the east and 4km to the north of the Order Limits respectively. Hadleigh is the largest settlement within the wider study area and lies approximately 1km north of the Order Limits. Other smaller settlements within the wider study area include Burstall, Hintlesham, Upper and Lower Layham, Polstead, Leavenheath, Assington, and Twinstead.
- 4.3.2 Large employers include Boxford Farm and the nearby fruit juice business. These own established orchards to the north-east of Leavenheath. Brett's Aggregates own Layham Quarry, which lies within Section C: Brett Valley and is an important business in terms of the local economy.
- 4.3.3 The proportion of economically active residents aged 16-64 in the Babergh district (73.2%) is lower than the Suffolk county (80.4%), regional (80.7%) and national (78.7%) averages (ONS, 2022b). Mid Suffolk district has a slightly higher proportion of economically active residents (81.3%) than the Suffolk county, regional and national averages. Braintree district has a significantly higher proportion of economically active residents at 84.8%, 3.6% higher than the Essex county average (81.2%) and 6.1% higher than the national average (ONS, 2022b).
- 4.3.4 Job density measures the ratio of total jobs in an area to the total resident population aged 16-64. The jobs density in Suffolk county (0.89) is higher than the regional (0.86) and national (0.87) averages. Essex county has a lower job density (0.78) than the regional and national averages. The job density in Mid Suffolk is the highest of the three districts, at 0.80, though this is lower than the Suffolk county average. Job density in Braintree (0.71) and Babergh (0.73) are both lower than the respective county, regional and national averages (Nomis, 2023d).
- 4.3.5 In 2022, the construction sector accounted for approximately 17% of businesses in the East of England region, 15% in Suffolk and 21% in Essex (ONS, 2022e). Also in 2022, the construction sector accounted for approximately 20% of businesses in the Braintree district (10% of all construction businesses in Essex and 2% of all businesses in Essex) and approximately 16% each of businesses in the Babergh and Mid Suffolk Districts (32% of all construction businesses in Suffolk and 5% of all businesses in Suffolk). The construction sector is the largest sector in Braintree district and Essex county and Babergh and Mid Suffolk districts and Suffolk county by number of registered enterprises.
- 4.3.6 Table 4.2 summarises turnover in the construction sector at a national and regional level. At the national level (England), the construction sector had a turnover of £218 billion in

2020 (ONS, 2022c). Within this sector, turnover for civil engineering projects was approximately £40.5 billion. Turnover for construction projects within the electricity and telecommunications markets is not available for England or East of England, however turnover at UK level was estimated at approximately £5.5 billion in 2020 (around 2% of the total turnover of the construction sector at UK level) (ONS, 2022d). At the regional level (East of England), turnover in the construction sector was approximately £32.3 billion in 2020, with civil engineering works accounting for £7.9 billion turnover. No information is Available from the regional level for the turnover of construction projects in the electricity and telecommunications subsector. Between 2019 and 2020 turnover in the construction sector in the East of England fell by approximately 12.5%. This was likely due to the effects of the COVID-19 pandemic. However, over the same period turnover for civil engineering projects in the East of England grew by approximately 27.9%.

Table 4.2 – Turnover in the Construction Sector at National and Regional Level

Sector/Sub-sector	Turnover at Geographical Level in 2020 (£ Billion)		
	UK	England	East of England
Construction	271.6	218.0	32.3
Civil engineering	51.3	40.5	7.9
Construction of utility projects for electricity and telecommunications	5.5	No data	No data

Source: ONS (2022c,d) Annual Business Survey 2020.

4.3.7 In summary, this shows that the local and regional economy is strong and has an active workforce. However, as for the UK as a whole, the economy is still likely to be recovering from the impacts of the COVID-19 pandemic. In addition, the invasion of Ukraine by Russia in 2022 has had an adverse impact on the global (including UK) economy, with impacts such as rising energy costs and supply chain shortages. It is not known when the conflict will be resolved, however it is considered that the UK economy is resilient enough to recover from the impacts. In the long-term it is likely that the construction industry will continue to grow as the Government encourages spending on infrastructure to grow the economy. This could lead to a shortfall in available skilled construction workers due to the high level of demand in this sector.

Effects During Construction

Local Economy

4.3.8 The capital cost of the project is anticipated to be approximately £499 million (based on April 2023 prices), which would be around £100 million per annum on average. From National Grid’s previous experience of similar projects, it is expected that around 65% of the project cost would be spent on civil engineering works (e.g. excavations, foundations, construction and reinstatement) and around 35% on plant and equipment (e.g. pylon materials, conductors and cables). Whilst it is possible that some of the civil engineering works could be tendered to specific contractors from outside the UK, it is assumed at this stage that all of the civil engineering work would be undertaken by UK based contractors. It would also be expected that some of the plant and equipment would be sourced from UK suppliers, however previous experience suggests that much of the plant and equipment supply would come from outside of the UK. These assumptions would see

around £324 million of net spend in the UK economy (approximately £64.9 million per annum) through the civil engineering contracts.

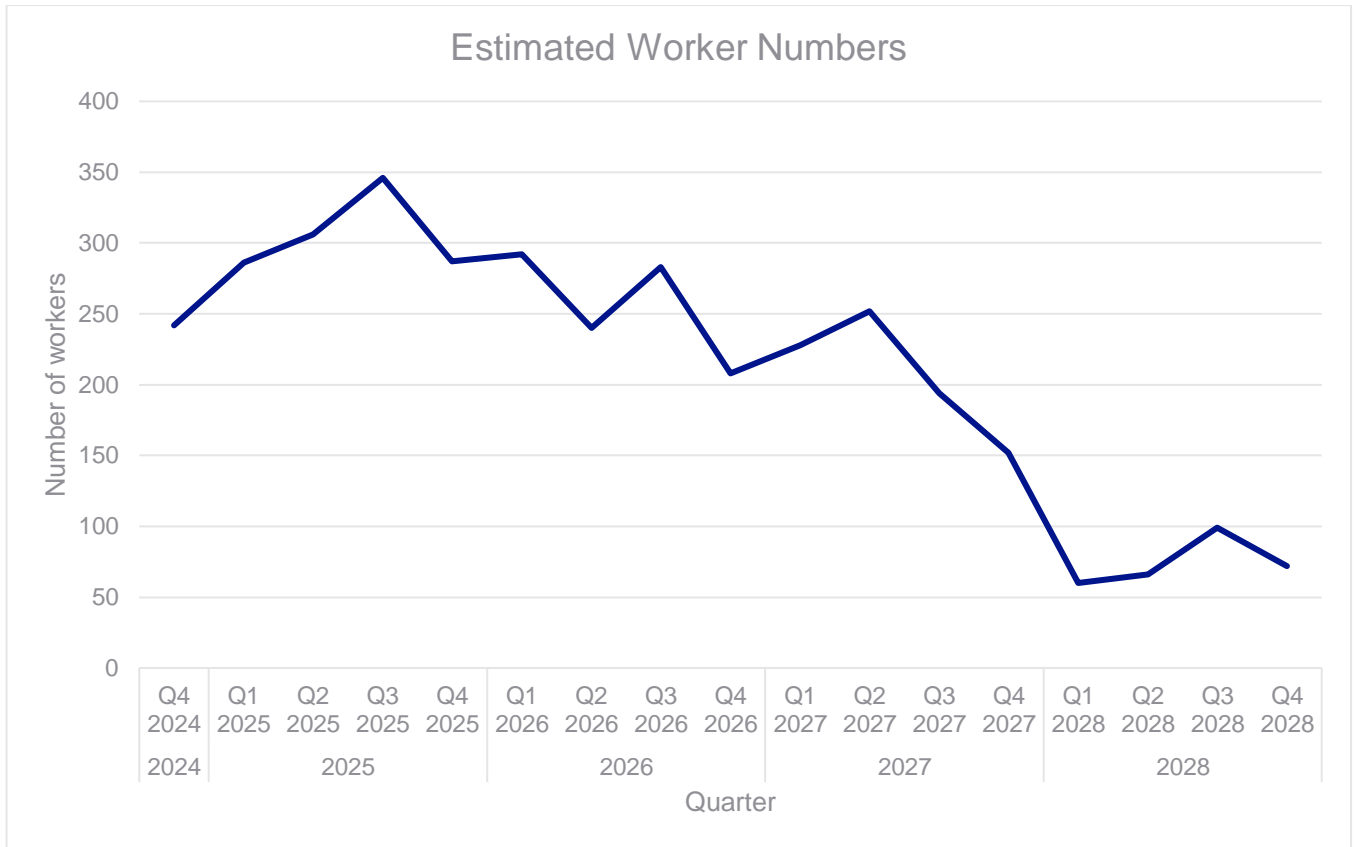
- 4.3.9 As shown in Table 4.2, the construction sector in the UK as a whole had a turnover of £271.6 billion in 2020, with £51.3 billion of this being on civil engineering projects and £5.5 billion being on construction projects for electricity or telecommunications projects. A construction spend of £324 million would represent approximately 0.1% of construction turnover in the UK, 0.6% of turnover of construction projects in civil engineering and 5.9% of turnover of construction projects for electricity and telecommunications. This contribution is considered to be a negligible contribution to the economy at the UK level.
- 4.3.10 At a regional level, the construction sector had a turnover of £32.3 billion in 2020, with £7.9 billion of this being on civil engineering projects (note: no data available at regional level for the turnover of construction projects for electricity or telecommunications projects). A construction spend of £324 million would represent approximately 1.0% of turnover of all construction work in the East of England and 4.1% of turnover of construction projects in civil engineering. This contribution is considered to be a negligible contribution to the economy at the regional level.
- 4.3.11 Until contracts are let for the construction work, there is no way of knowing how much of the construction spend would be placed into the local economy. Given that much of the spend is anticipated to go to specialist contractors who may not be based in the local area, it is expected that effects would be negligible to slightly beneficial at best.
- 4.3.12 The project may source materials and services from the local area, which could boost the local economy during construction. Examples could include construction supplies such as skip hire, fencing and planting for landscaping. Material supply and demand will vary significantly, and it is not possible to specify sources at the time of DCO application.
- 4.3.13 Given the limited effects that the project would have on local material supply and services, the project is unlikely to have a significant effect on the local economy during construction.

Local Businesses

- 4.3.14 National Grid has been working with local landowners and businesses that lie within the Order Limits to seek to reduce impacts on their operations. For example, National Grid has reduced the Order Limits and aligned these along a track in Section E: Dedham Vale AONB to reduce the effects on the orchard trees at Boxford Fruit Farm. In addition, National Grid has committed to an embedded measure (EM-E03) (see the REAC (**application document 7.5.2**)), which commits the project to using suitable methods to protect orchard trees at the farm when lowering and removing the 132kV overhead line. This would reduce the loss of trees within the orchards and limit the effects on the fruit farm business.
- 4.3.15 National Grid has not identified any local businesses that would have severance to access or closure of their business during construction. There may be the need for local roads to be closed for short durations (generally up to two weeks) during construction, for example during the construction of a bellmouth, however in accordance with good practice measure AS03 (see CoCP (**application document 7.5.1**)), access would be maintained for residents, landowners and businesses. In addition, given the rolling nature of the linear works, the construction activities in any particular area are likely to be short term and there is unlikely to be any direct effects to local businesses.

- 4.3.16 The project could cause temporary direct effects to the operation of agricultural businesses through disruption or loss of agricultural land during construction. The vast majority of agricultural land would be reinstated following construction and existing agricultural operations would continue. These effects are assessed within ES Chapter 11: Agriculture and Soils (**application document 6.2.11**) and are not duplicated here.
- 4.3.17 There could be indirect economic effects to individual businesses, for example loss of business to a holiday let during construction. These matters are addressed outside of the EIA, through the landowner discussions and compensation arrangements. Therefore, indirect economic effects to local businesses are not considered further here.
- 4.3.18 There could also be a minor benefit to the local economy in terms of the construction workforce spending money in the form of accommodation and food (induced spend). Based on the alternative scenario presented in ES Appendix 4.2: Construction Schedule (**application document 6.3.4.2**), which is considered to be a worst-case scenario in terms of workforce numbers, the workforce numbers are estimated to be around 350 staff at peak and an average of around 180 workers on site across the whole of the alternative construction schedule (Illustration 4.1). This is not a large number in workforce terms (in comparison with Sizewell C, for example, which is expected to employ an estimated 7,900 construction workers at peak construction).
- 4.3.19 Previous National Grid project experience indicates that these workers would be split between around 10% from the local area and 90% who would travel into the area from elsewhere. Assuming an average of around 180 workers on site at any one time, this would equate to an average of 18 local workers and 162 non-local workers.
- 4.3.20 For those workers who would travel into the area, National Grid estimates that they would each spend £60-70 per day on accommodation, food and other local services. For the main construction period (54 months), this would generate approximately £10,530 per day to the economy, or approximately £2.74 million per year or £12.32 million over this period in total (based on an assumed average spend of £65 per working day per non-local worker, and 260 working days per year).
- 4.3.21 With the size of the regional economies in the wider study area (for example, the tourism economies in 2019 on their own were valued at £3.4 billion in Essex and £2.1 billion in Suffolk (Destination Research, 2019a and 2019b)), an approximate spend of £2.74 million per year by non-local workers and the support of 18 local jobs is considered to be a negligible contribution. In addition, due to the linear and rolling nature of the works the construction workforce would not be concentrated in one particular area for a significant amount of time. Therefore, workforce spending is not expected to provide a significant contribution to the local economy.

Illustration 4.1 – Estimated Worker Numbers (Based on the Alternative Scenario)



Local Jobs and Employment

- 4.3.22 The majority of employment activities would require trained specialists who are qualified to work on high voltage electricity lines. These are typically sourced from National Grid’s existing pool of approved contractors. However, from experience of other National Grid projects, it is likely that a minimum of 10% of the workforce would be sourced from the local labour market, including apprentices, security workers and delivery drivers. This level of local employment, based on a peak monthly employment assumption of 350 workers, could result in the peak monthly local job demand being up to approximately 35 jobs locally, which could be accommodated from the local labour pool based on the jobs density data presented in paragraph 4.3.4.
- 4.3.23 National Grid promotes the use of local supply and small/medium enterprises through main contractors by embedded targets within its framework contracts. National Grid will continue to work with relevant planning authorities and business leaders at a national, regional and local level to identify opportunities to invest in employment networks, including looking for opportunities to work with local businesses.
- 4.3.24 Given the relatively low numbers of construction workers employed on the project and that the project would require workers to be experienced in working on high voltage electricity lines, there are unlikely to be significant adverse effects on jobs and employment. The above measures could deliver small beneficial effects through the creation of local job and employment opportunities. As these cannot be guaranteed and as they would be low in number, they are unlikely to result in significant effects on job creation and employment during construction.

Effects During Operation

Local Economy

- 4.3.25 The project would create additional capacity within the power network and would help to meet Government targets to deliver net zero emissions, as described in the Need Case (**application document 7.2.1**). This is aligned with the Government's aim of transitioning the country to a Green Economy (HM Government, 2011). The project would also improve the security of supply of power to the network, to reduce the risk of outages. Therefore, although not assessed within this chapter, the project supports the general economy (including at a local level) by providing power to homes and businesses to meet future demands and by reinforcing the network to reduce the risk of outages that would affect businesses and the economy. This forms the basis of the need of the project and is not duplicated in the assessment.
- 4.3.26 There is unlikely to be a significant effect on the local economy during operation, as land used temporarily during construction would be reinstated at the end of construction (GG07 in the CoCP (**application document 7.5.1**)) and routine operational inspections and maintenance would be of a similar order of magnitude to that undertaken on the existing 400kV overhead line, with no additional jobs anticipated as a result of the operational phase.

Local Businesses

- 4.3.27 There is unlikely to be a significant effect on local businesses during operation, as land used temporarily during construction would be reinstated at the end of construction (GG07 in the CoCP (**application document 7.5.1**)).
- 4.3.28 Where there are permanent changes to land use, such as at the grid supply point substation, these would be a matter for the landowner discussions and compensation arrangements. Further details can be found in the Statement of Reasons (**application document 4.2**) and its Appendix B (**application document 4.2.2**), which include a schedule of negotiations with land interests.

Local Jobs and Employment

- 4.3.29 The grid supply point substation and cable sealing end compounds would be operated remotely and would not require any operators to be permanently on site. There would be routine inspections and maintenance associated with the project, but this would be of a similar order of magnitude to that undertaken on the existing 400kV overhead line, and no additional jobs are anticipated directly as a result of the operational phase. Therefore, it is considered unlikely that there would be significant effects during operation on jobs and the economy.

4.4 Community Services

Existing Baseline

- 4.4.1 Community service providers include health centres, education facilities (such as colleges and schools) and community facilities (such as village halls). Other businesses are also considered to be community facilities because they provide an essential community service, for example a private day nursery or care home. No community facilities are

identified within the Order Limits. There are educational and health facilities within the wider study area which include:

- Health centres: Hadleigh Health Centre and Hadleigh Group Practice;
- Schools: Hintlesham and Chattisham voluntary controlled Church of England Primary School, Beaumont Community Primary School, Hadleigh Community Primary School, Hadleigh High School, St Mary's Church of England Primary School; and
- Nurseries: Birch Farm Day Care Nursery.

4.4.2 The community services baseline could be expected to expand over time as population increases (see Section 4.2), resulting in growing demand for community services such as schools and nurseries.

Effects During Construction

4.4.3 There are no community services within the Order Limits. Therefore, it is unlikely that the project would have direct effects on access to or the operation of community services during construction.

4.4.4 There could be indirect effects as a result of construction traffic causing either severance to access or delays to community services. These effects are considered within ES Chapter 12: Traffic and Transport (**application document 6.2.12**), which conclude that there are unlikely to be significant effects on the local road network. This is not considered further within this report to avoid duplication.

4.4.5 Increased demand for community services arising from the presence of construction workers is unlikely, due to the relatively short duration of construction. In addition, the expected profile of the workforce means that workers are unlikely to permanently relocate to the area. Therefore, there is no anticipated increased demand on community services during construction.

Effects During Operation

4.4.6 There are no community services within the Order Limits. Therefore, it is unlikely that the project would have direct effects on access to or the operation of community services during operation.

4.4.7 As the project is not anticipated to create additional jobs during the operational phase, no workers are anticipated to permanently relocate to the area. Therefore, there is no anticipated increased demand on community services during operation.

5. Tourism

5.1 Introduction

5.1.1 This chapter considers the likelihood of the project having significant effects on tourism. It assesses the effects on tourism by considering the following receptors:

- Effects on the tourist economy as a whole;
- Effects on visitor attractions; and
- Effects on tourism accommodation.

5.2 Tourist Economy

Existing Baseline

5.2.1 Tourism forms a significant proportion of the regional economy in Essex and Suffolk, generating an estimated total value of £3.4 billion and £2.1 billion to the respective economies (Destination Research, 2019a and 2019b). Tourism-related employment totals approximately 69,000 in Essex (10.0% of all employment in the county) (Destination Research, 2019a) and 44,500 in Suffolk (14.2% of all employment in the county) (Destination Research, 2019b). The detail at a district level is provided in Table 5.1.

Table 5.1 – Estimated Contribution of Tourism to District Economies

Geographical Area	Estimated Value of Tourism (£m)	Number of Full Time Equivalent Jobs	Share of all Employment in the District
Suffolk (County)	2,144	44,498	14.2%
Mid Suffolk (District)	177	2,927	9.5%
Babergh (District)	200	3,262	11.7%
Essex (County)	3,500	51,424	10.0%
Braintree (District)	186	2,984	5.2%

Sources: Babergh and Mid Suffolk figures (Babergh and Mid Suffolk District Council website, 2016); Braintree figures (Braintree Tourism Plan for the District 2019-2021, 2017); Suffolk county figures (Destination Research, 2019b); Essex county figures (Destination Research, 2019a).

5.2.2 Tourism in the Dedham Vale AONB (parts of which lie within the Order Limits) was worth an estimated £68 million in 2019 and supported 1,490 jobs. Tourism in the SVPA (parts of which lie within the Order Limits) was worth an estimated £49 million and supported 1,283 jobs (Dedham Vale AONB, 2021). The ‘natural environment’, ‘peace and quiet’, and ‘walking opportunities’ are considered to be the top three most valued features of the AONB by visitors surveyed (LUC, 2019).

5.2.3 There are also businesses within the wider study area that relate to the tourism sector. These include accommodation facilities within the wider study area including Hintlesham Hall Hotel, College Farm, Claremont Cottage, Sprotts Farm, Assington Mill Farm and Ansells Farm.

- 5.2.4 Issues around Brexit, foreign exchange rates and the slowdown in economic recovery have generally raised a degree of uncertainty in the tourism sector, particularly outside the London Market. A weaker pound could make the UK a more affordable location to visit for overseas visitors and this may also increase the number of staycations (White Young Green, 2017).
- 5.2.5 COVID-19 has also had a significant effect on tourism. The trend in the tourism sector before the COVID-19 pandemic was one of steady growth, with a general year-to-year increase in the total value of tourism and number of tourism-related jobs in Essex and Suffolk (Destination Research, 2019a and b). Data from the ONS (2021) showed that accommodation occupancy rates during 2020 were much lower in the East of England than the equivalent numbers for the same months in 2019. In August 2020 (after the first lockdown had been lifted) occupancy rates were at 55% compared to 79% in 2019. Between 2019 and 2020 the estimated economic value of tourism in Suffolk fell by 59% (from approximately £2.1 billion to £885 million) and the estimated number of jobs in the tourism sector in Suffolk fell by 42% (from approximately 44,500 to 25,840) (Destination Research, 2020a). Similar drops in estimated economic value and tourism jobs for Essex were estimated over the same period (Destination Research, 2020b).
- 5.2.6 Tourist numbers and revenue are likely to fluctuate year-on-year, primarily due to external factors such as the economy, foreign exchange rates and the weather. It is also unclear how recovery from the COVID-19 restrictions, will change patterns of tourist numbers and tourism revenue going forward.

Effects During Construction

- 5.2.7 Tourism is a significant contributor to the local economy and generates jobs for the local workforce. During construction, there is the potential for temporary amenity effects resulting from noise, dust and traffic congestion which could have an effect on how tourists experience the area as a whole. The good practice measures set out within the CoCP (**application document 7.5.1**) would reduce these effects. In addition, the linear nature of the project means that effects would be short term in most locations and effects would be contained to the construction phase. With these measures in place, it is unlikely that the project would result in significant effects on the tourism economy during construction. Further consideration on amenity as a whole, due to intra-project cumulative effects is presented in ES Chapter 15: Cumulative Effects Assessment (**application document 6.2.15**).

Effects During Operation

- 5.2.8 There is unlikely to be a significant effect on the tourism economy during operation. The project has embedded measures which would reduce impacts to the tourist economy and the amenity of visitor attractions. The full list of embedded measures is presented in the REAC (**application document 7.5.2**) and includes:
- EM-P02: Removal of approximately 25km of the existing 132kV overhead line between Burstall Bridge and Twinstead Tee, which would reduce the magnitude of change of the new overhead line on the landscape and views;
 - EM-G01: Removal of approximately 2km of the existing 400kV overhead line to the south of Twinstead Tee;

- EM-E01 and EM-G02: Underground cable through Section E: Dedham Vale AONB and a section of Section G: Stour Valley, respectively, which, in addition to the removal of the existing 132kV overhead line, means that compared to the existing situation (i.e. baseline) the project would result in one less overhead line within the landscape of these valued landscapes;
- EM-P03: Use of triple Araucaria conductors or alternative technology that performs to the same or better standard in relation to noise on standard lattice pylons, which would avoid the generation of noise from the proposed overhead lines during operation and therefore not affect the amenity of visitor attractions;
- EM-D01, EM-F01, EM-G03, EM-G06 and EM-H02: Inclusion of land within the Order Limits for embedded planting around the CSE compounds and GSP substation, which would filter and soften views of project components and reduce effects on views and landscape character; and
- EM-E05, EM-G04 and EM-G08: Use of trenchless crossings at the River Box and River Stour and south of Ansell's Grove respectively, which would avoid disturbance to habitats, reduce effects on landscape and views, and reduce disruption to recreational users (e.g. canoeists on the River Stour).

5.2.9 Land used temporarily during construction would be reinstated at the end of construction (GG07 in the CoCP (**application document 7.5.1**)). In addition, due to the nature of the project, there would not be a permanent operational workforce and therefore no opportunity for induced spend (e.g. on accommodation or visitor attractions) in the local and tourist economy. The operational maintenance works required for the project would be of a similar magnitude to the operational maintenance works to maintain the existing overhead line and other National Grid assets within the region. Therefore, there would be no change over the existing baseline and no likely significant effects on the tourist economy during operation resulting from changes to amenity.

5.3 Visitor Attractions

Existing Baseline

- 5.3.1 Sudbury is a large market town which lies 0.5km outside of the wider study area. Attractions in Sudbury include museums such as Gainsborough's House and Sudbury Heritage Centre and Museum, entertainment venues such as the Quay Theatre and St Peter's Cultural Venue, water-based recreation such as organised boat trips on the River Stour between Sudbury, Great Cornard and Great Henny (all upstream of the Order Limits), and markets such as the Sudbury Town Market and Sudbury Farmers Market.
- 5.3.2 Hadleigh is a market town within the wider study area that provides a focus of tourist accommodation, services and facilities. The town provides a venue for the annual (during May) Hadleigh Agricultural Show, which is a traditional agricultural show celebrating aspects of country living.
- 5.3.3 Great Cornard is a country park that lies on the southern edge of Sudbury approximately 100m beyond the wider study area. There are no National Trust properties or open access land under the Countryside and Rights of Way Act Section 15 within the Order Limits or wider study area. There are no National Trails within the Order Limits or the wider study area.

- 5.3.4 Dedham Vale AONB and Stour Valley are key visitor attractions, parts of which lie within the Order Limits. These have a strong cultural heritage due to their association with the artists John Constable, Alfred Munnings and Thomas Gainsborough. Dedham Vale AONB and Stour Valley also cater for a wide range of recreation activities including walking, riding, boating, wildlife watching, countryside sports and visiting historical sites and buildings.
- 5.3.5 Other visitor attractions within the Order Limits or immediately adjacent to it include Hintlesham Golf Course, commercial coarse fishing lakes at Kate's Hill, Hadleigh Railway Walk, Stoke by Nayland Hotel Golf Course and Spa, the Painters Trail, Benton End Farm and Daws Hall Centre for Environmental Education (which offers regular public and educational events).
- 5.3.6 The COVID-19 pandemic prompted a shift in tourism patterns, with more domestic tourism and demand at visitor attractions within the UK. If demand at domestic visitor attractions is sustained post-pandemic or increases further, the visitor attraction baseline could change over time with more visitor attractions such as golf courses and spas being constructed to meet demand.

Effects During Construction

- 5.3.7 The project has avoided direct effects to key tourist areas such as Bures, Sudbury and Hadleigh, through the corridor and routing studies. There are also unlikely to be direct effects (such as land take) to other visitor attractions and features such as Hintlesham Golf Course, Kate's Hill Fishing Lakes, Stoke by Nayland Hotel Golf Course and Spa, and Daws Hall Centre for Environmental Education as these all lie outside of the Order Limits. Therefore, there is unlikely to be a direct effect on visitor attractions due to these lying outside of the Order Limits.
- 5.3.8 The project would have direct effects to parts of the Dedham Vale AONB and the Stour Valley during construction. This could include some paths being temporarily closed or diverted and the working area being fenced off during construction. The Order Limits covers less than 1% of both Dedham Vale AONB and the SVPA. The good practice measures within the CoCP (**application document 7.5.1**) would reduce the effects experienced by visitors, by only closing accesses for short periods while construction activities occur and providing signed diversions for any temporary diversions required (TT03 in the CoCP), and therefore it is considered unlikely that there would be significant effects on these visitor attractions.
- 5.3.9 There could be potential for indirect effects in relation to construction traffic causing congestion, air pollution and noise, which are addressed in ES Chapters 12, 13 and 14 (**application documents 6.2.12 to 6.2.14**) respectively. Potential intra-project cumulative effects on amenity of tourist receptors are considered within ES Chapter 15: Cumulative Effects Assessment (**application document 6.2.15**) and are not duplicated here.
- 5.3.10 The trenchless crossing at the River Stour would be located approximately 2km from Great Henny, where the organised River Stour boat trips between Sudbury, Great Cornard and Great Henny take place, therefore there would not be direct or indirect effects on the boat trips.

Effects During Operation

- 5.3.11 National Grid has sought to avoid visitor attractions through the options appraisal. In addition, an underground cable is proposed in areas with the highest amenity value (Dedham Vale AONB and the Stour Valley). The project proposes to remove the existing 132kV overhead line within the Order Limits to reduce the wirescape in Dedham Vale AONB and the Stour Valley (EM-P02).
- 5.3.12 Once reinstatement planting matures, there is potential for the project to have a beneficial effect on Dedham Vale AONB and the Stour Valley due to the undergrounding of cables which were previously within the view of tourists and recreational users at some locations. Further details on these potential benefits can be found in ES Chapter 6: Landscape and Visual (**application document 6.2.6**). This could lead to increased demand at those visitor attractions, however it is unlikely that there would be a significant beneficial effect.

5.4 Tourist Accommodation

Existing Baseline

- 5.4.1 The dominant accommodation types in Babergh and Mid Suffolk are holiday dwellings and hotels. Hotels account for 75% of the accommodation stock in Braintree district, while in Ipswich the proportion is even higher (84% of the accommodation stock is hotels) (VisitBritain, 2016).
- 5.4.2 A more detailed study also looked specifically at accommodation within the planning authority of Ipswich and Suffolk Coasts (White Young Green, 2017). This identified 15 hotels within Ipswich, which is dominated by the budget market including Premier Inn and Travelodge. The report also identified a substantial level of new hotel provision planned, including the EasyHotel, Ipswich (which has since been constructed) and growth of Airbnb over recent years, with 300 rooms identified in the Ipswich area (White Young Green, 2017). It identified that occupancy rates at 68% (based on 2016 data) were lower than the national average and was identified as a consequence due to the rapid expansion of hotel room numbers in recent years. This suggests that there is capacity in the existing market to accommodate additional visitors, albeit there would appear to be limited capacity at peak times (White Young Green, 2017).
- 5.4.3 Table 5.2 summarises the number of bedspaces available from the district and county level identified in a VisitBritain survey of accommodation stock (2016). Babergh has the highest number of bedspaces available (2,336). Serviced accommodation, including hotels, account for approximately 85% of all bedspaces available in the four districts. Bedspace occupancy rates were at 61% for the East of England during the peak of the summer season in July 2022, approximately 2% higher than bedspace occupancy in July 2019 (VisitEngland, 2022). In 2022, bedspace occupancy in the East of England was highest in the months of May to September, averaging 59%, slightly higher than the average bedspace occupancy in England at 57% over the same period (VisitEngland, 2022).

Table 5.2 – Number of Bedspaces (VisitBritain Survey of Accommodation Stock, 2016)

Type of Accommodation	Babergh	Mid Suffolk	Ipswich	Braintree	Suffolk	Essex
Hotels and similar	1,871	1,201	1,884	1,769	12,233	24,315

Type of Accommodation	Babergh	Mid Suffolk	Ipswich	Braintree	Suffolk	Essex
Total serviced accommodation	1,871	1,201	1,884	1,769	12,233	24,315
Holiday dwellings	360	450	21	82	5,302	784
Tourist campsites	85	138	0	0	2,989	30,208
Other collective accommodation	20	13	0	0	96	61
Total non-serviced accommodation	465	601	21	82	8,387	31,053
Total accommodation	2,336	1,802	1,905	1,851	20,620	55,368

5.4.4 There are accommodation facilities within the wider study area. Hintlesham Hall Hotel is the largest accommodation facility. The remaining accommodation facilities comprise bed and breakfasts and small self-catered facilities, including College Farm, Claremont Cottage, Sprotts Farm, Assington Mill Farm and Ansell's Farm.

5.4.5 The trend, particularly in Ipswich, is a continued growth in hotel accommodation, particularly budget chains (which are relevant to the construction sector). In addition, there has been a continued rise of Airbnb rooms, often seen as a cheaper alternative to traditional hotel accommodation. The COVID-19 pandemic prompted a shift in tourism patterns, with more domestic tourism in the UK. If rates of domestic tourism are sustained post-pandemic or increase further, the tourism accommodation baseline could change over time with more accommodation facilities being constructed to meet domestic tourism demand.

Effects During Construction

5.4.6 The assessment of effects on tourism accommodation is based on the profile of construction activities and associated worker numbers shown in Illustration 4.1. The assessment takes into account the capacity of tourism accommodation at a sub-regional level to accommodate expected worker numbers for the project.

5.4.7 The in-migration of the construction staff for the project could place a demand on accommodation within the wider study area and beyond. From previous project experience (National Grid, 2016), National Grid anticipates that of the staff employed during construction of the project:

- 50% would stay in caravan and camping accommodation;
- 20% would stay in short-term let properties (such as through the private rented market);
- 20% would stay in serviced accommodation (bed and breakfasts, hotels); and
- 10% would travel to the area from home.

5.4.8 The workforce numbers are estimated to be up to 350 workers per day at peak across the project (under the alternative scenario, which is considered to be a worst-case scenario in terms of workforce numbers) (as shown on Illustration 4.1). Assuming an estimated peak workforce of around 350 staff, and the above anticipated accommodation demand, local staff are likely to number approximately 35 at peak. As presented above,

50% of the workforce (175 workers) are expected to use caravan or camping facilities and are unlikely to use the higher end accommodation tourism accommodation facilities located near to the Order Limits. An estimated 140 workers (40%) are estimated to stay in short-term lets or serviced accommodation. However, it is highly unlikely that workers would take up single occupancy and it is more likely that workers would share accommodation. In addition, the short-term lets are likely to be spread across the district or county, for example using the Ipswich and Colchester rental markets, to increase the range of available accommodation.

5.4.9 Data obtained from VisitEngland (2022) show that there is a bedspace occupancy rate of around 59% over the peak season in the East of England, which indicates there is sufficient availability in the private sector to accommodate the project workforce without compromising the accommodation available to tourists visiting the area.

5.4.10 Given the relatively small number of workers compared to other major construction projects, the availability of accommodation with the local and wider areas (including Ipswich and Colchester), it is considered that the construction workforce is unlikely to result in significant adverse effects on tourist accommodation during construction.

Effects During Operation

5.4.11 Due to the nature of the project, there would not be a permanent operational workforce. Workers would be occasionally required for operational maintenance works, however this would be the same locally based staff that are used to maintain the existing overhead line and other National Grid assets within the region. Therefore, there would be no change to the use of tourist accommodation over the existing baseline.

6. Conclusion

6.1.1 This report provides updated baseline data as requested in ID 4.10.4-4.10.5 in the Scoping Opinion (**application document 6.6**). This report demonstrates that many of the contributory factors affecting socio-economics and tourism during construction (for example visual, noise, dust and traffic) are already considered within the aspect chapters of the ES. It also presents a review of the previous assessment work based on the updated data and current project assumptions regarding worker numbers and durations. The results of the assessment are summarised in Table 6.1.

Table 6.1 – Summary of the Assessment

Aspect	Likely Significant Effects During Construction	Likely Significant Effects During Operation
Socio-economics		
Local economy, businesses, jobs and employment	No likely significant effects.	No likely significant effects.
Community services	No likely significant effects.	No likely significant effects.
Tourism		
Tourist economy	No likely significant effects.	No likely significant effects.
Visitor attractions	No likely significant effects.	No likely significant effects.
Tourist accommodation	No likely significant effects.	No likely significant effects.

6.1.2 Table 6.1 assumes that the commitments that National Grid has made in terms of the embedded measures in the REAC (**application document 7.5.2**) and good practice measures within the CoCP (**application document 7.5.1**) would be in place. These measures would be secured through the design presented within the application and through Requirement 4 of the draft DCO (**application document 3.1**) which secures the CEMP (**application document 7.5**) and its appendices.

6.1.3 The updated baseline and the review of the previous assessment has shown that the project would not result in any likely significant effects on socio-economics or tourism. This is based on the relatively low number of workers that would be employed by the project and the temporary duration of the project effects. Therefore, this report confirms the conclusions presented in the Scoping Report (**application document 6.5.1**) that there are unlikely to be any likely significant effects on socio-economics and tourism, and therefore socio-economics and tourism remain scoped out of the ES as a standalone chapter.

References

- Braintree District Council (2019) Tourism Plan for the District 2019-2021.
- Braintree, Babergh and Mid Suffolk District Council websites, accessed March 2023.
- Dedham Vale AONB and Stour Valley Project (2021) Dedham Vale AONB and Stour Valley Management Plan 2021-26.
- Department for Business, Energy and Industrial Strategy (2021a) Draft Overarching National Policy Statement for Energy (EN-1) September 2021.
- Department for Business, Energy and Industrial Strategy (2021b) Draft Overarching National Policy Statement for Energy (EN-5) September 2021.
- Department for Environment, Food and Rural Affairs MAGIC Map. (Online).
- Department of Energy and Climate Change (2011a) Overarching National Policy Statement for Energy (EN-1). London: Stationery Office.
- Department of Energy and Climate Change (2011b) National Policy Statement for Electricity Networks Infrastructure (EN-5). London: Stationery Office.
- Destination Research (2019a) Economic impact of tourism – Essex 2019.
- Destination Research (2019b) Economic impact of tourism – Suffolk 2019.
- Destination Research (2020a) Economic impact of tourism – Suffolk 2020.
- Destination Research (2020b) Economic impact of tourism – Essex 2020.
- Google Earth. (Online).
- Google Maps. (Online).
- HM Government (2011) Enabling the Transition to a Green Economy: Government and business working together.
- LUC (2019) Dedham Vale AONB and Stour Valley Project Area State of the AONB Report.
- Ministry of Housing, Communities and Local Government (2019) Indices of Deprivation Explorer. (Online) Available from: http://dclgapps.communities.gov.uk/imd/iod_index.html (Accessed March 2023).
- National Grid (2016) Richborough Connection Project Volume 5: 5.2 Environmental Statement.
- Nomis (2023a) TS007 – Age by single year (2021) data set. (Online) Accessed March 2023).
- Nomis (2023b) TS006 – Population density (2021) data set. (Online) (Accessed March 2023).
- Nomis (2023c) TS008 – Sex (2021) data set. (Online) (Accessed March 2023).
- Nomis (2023d) Jobs density data set (2021). (Online) (Accessed March 2023).
- Office for National Statistics (2020a) Subnational population projections for England: 2018-based. (Online) Available from: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/subnationalpopulationprojectionsforengland/2018based> (Accessed March 2023).

Office for National Statistics (2022a) Population and household estimates, England and Wales: Census 2021. (Online) Available from: <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationandhouseholdestimatesenglandandwalescensus2021> (Accessed March 2023).

Office for National Statistics (2022b) Annual Population Survey October 2021 to September 2022.

Office for National Statistics (2022c) Annual Business Survey 2020. Non-financial business economy, UK regional results: Sections A to S dataset. (Online) Available from: <https://www.ons.gov.uk/businessindustryandtrade/business/businessservices/datasets/uknonfinancialbusinesseseconomyannualbusinesssurveyregionalresultssectionsas> (Accessed March 2023).

Office for National Statistics (2022d) Annual Business Survey 2020. Non-financial business economy, UK: Sections A to S dataset. (Online) Available from: <https://www.ons.gov.uk/businessindustryandtrade/business/businessservices/datasets/uknonfinancialbusinesseseconomyannualbusinesssurveysectionsas> (Accessed March 2023).

Office for National Statistics (2022e) UK business: activity, size and location. (Online) Available from: <https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation> (Accessed March 2023).

Ordnance Survey (2022) AddressBase Plus. Southampton: Local Government Information House Limited.

VisitBritain (2016) Accommodation Stock Audit. (Online) (Accessed July 2022).

VisitBritain website. Various survey data and statistics from the website. (Accessed July 2022).

VisitEngland (2022) England Occupancy Survey September 2022 Results. (Accessed December 2022).

VisitEngland website. Various survey data and statistics from the website. (Accessed July 2022).

White Young Green (2017) Ipswich Borough and Suffolk Coastal District Retail and Commercial Leisure Town Centre Study.

National Grid plc
National Grid House,
Warwick Technology Park,
Gallows Hill, Warwick.
CV34 6DA United Kingdom

Registered in England and Wales
No. 4031152
nationalgrid.com