NORTH FALLS

Offshore Wind Farm

PRELIMINARY ENVIRONMENTAL INFORMATION REPORT

Chapter 32 Tourism and Recreation

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Glossary of Acronyms

ALARP	As Low as Reasonably Practicable
AONB	Area of Outstanding Natural Beauty
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
Defra	Department for Environment, Food and Rural Affairs
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
MMO	Marine Management Organisation
NCN	National Cycle Network
NFOW	North Falls Offshore Wind Farm
NNR	National Nature Reserve
NPS	National Policy Statement
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
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
SLVIA	Seascape, Landscape, and Visual Impact Assessment
SPA	Special Protected Area
SSSI	Site of Specific Scientific Interest
WTG	Wind Turbine Generator
ZTV	Zone of Theoretical Visibility

Glossary of Terminology

The Applicant	North Falls Offshore Wind Farm Limited (NFOW).
Array areas	The two distinct offshore wind farm areas (including the 'northern array area' and 'southern array area') which together comprise the North Falls offshore wind farm.
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 the landfall. The technique will also be used for installation of the onshore export cables at sensitive areas of the onshore cable route.
Interconnector cable corridor	The corridor of the seabed between the northern and southern array areas
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.
Landfall	The location where the offshore cables come ashore.
Landfall compound	Compound at landfall within which HDD or other trenchless technique would take place
Landfall search area	Locations being considered for the landfall, comprising the Essex coast between Clacton-on-Sea and Frinton-on-Sea.
Link boxes	Underground chambers or above ground cabinets next to the onshore export cables housing low voltage electrical earthing links.
Offshore cable corridor	The corridor of seabed from array areas to the landfall within which the offshore export cables will be located.
Offshore export cables	The cables which bring electricity from the array areas to the landfall.
Offshore project area	The overall area of the array areas and the offshore cable corridor.
Offshore substation platform(s)	Fixed structure(s) located within the array areas, containing electrical equipment to aggregate the power from the wind turbine generators and convert it into a more suitable voltage for export to shore via offshore export cables.
Onshore cable corridor(s)	Onshore corridor(s) within which the onshore export cables and associated infrastructure will be located. A final onshore cable route for which consent will be sought will be selected from within these corridor(s).
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, 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), as considered within the PEIR.
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 zone	Area within which the onshore substation will be located.
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 Preliminary Environmental Information Report (PEIR) considers the likely significant effects of the North Falls Offshore Wind Farm (OWF) (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 Chapter 31 Socio-economics (Volume I).
2. This chapter has been written by Royal HaskoningDHV, with additional input provided by Hatch. The assessment is undertaken with specific reference to the relevant legislation and guidance, of which the primary sources 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 I):
    - Chapter 9 Marine Water and Sediment Quality;
    - Chapter 15 Shipping and Navigation;
    - Chapter 20 Onshore Air Quality;
    - Chapter 26 Noise and Vibration;
    - Chapter 27 Traffic and Transport;
    - Chapter 28 Human Health;
    - Chapter 29 Seascape, Landscape and Visual Impact Assessment;
    - Chapter 30 Landscape and Visual Impact Assessment; and
    - Chapter 31 Socio-economics.

32.2 Consultation

4. Consultation with regard to tourism and recreation has been undertaken in line with the general process described in Chapter 6 EIA Methodology (Volume I). The key elements to date have included scoping and the ongoing technical consultation via the seascape, landscape and visual impact, land use, health, socio-economics and tourism Expert Topic Group (ETG). Chapter 7 Technical Consultation (Volume I) gives further details on ETG structures and attendees. The feedback received has been considered in preparing the PEIR.

5. North Falls Offshore Wind Farm Limited (NFOW) (hereafter 'the Applicant') submitted a Scoping Report and requested for 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 how comments relevant to tourism and recreation received from the Planning Inspectorate and other consultation events have been addressed and identifies the section(s) in which each of these comments is addressed.

7. This chapter will be updated following the consultation on the PEIR in order to produce the final assessment, which will be presented in an Environmental Statement (ES) that will be submitted with the Development Consent Order (DCO) application.

Table 32.1 Consultation responses

Consultee	Date / Document	Comment	Response / where addressed in the PEIR
Planning Inspectorate	August 2021 / Scoping Opinion	Section 4.2.3- Potential impacts 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. Pressure on local onshore housing infrastructure is assessed within Chapter 31 Socio-economics (Volume I).
Planning Inspectorate	August 2021 / Scoping Opinion	Mitigation – Timing of Works 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. Wider economic effects from disruption to shipping are assessed within Chapter 31 Socio-economics (Volume I).
Planning Inspectorate	August 2021 / Scoping Opinion	Inter relationships 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	No significant residual effects are identified in Chapter 17 Aviation and Radar. Thus, there is no pathway for inter-relationships with tourism and recreation and this is scoped out of further assessment.

Consultee	Date / Document	Comment	Response / where addressed in the PEIR
		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.	
Planning Inspectorate	August 2021 / Scoping Opinion	Table 4.5 - Restricted beach access - operation 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 completion of construction, the Inspectorate agrees that this matter can be scoped out of the ES.	Noted by the Applicant.
Planning Inspectorate	August 2021 / Scoping Opinion	Table 4.5- Deterioration to bathing water quality – operation 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 search area during the operation phase of the Project are considered in Section 32.6. No significant residual effects related to the deterioration of marine bathing water quality during the operation phase identified in Chapter 9 Marine Water and Sediment Quality (Volume I).
Planning Inspectorate	August 2021 / Scoping Opinion	Table 4.5- Loss of and disturbance to onshore local tourism and recreation assets – operation 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.

Consultee	Date / Document	Comment	Response / where addressed in the PEIR
Planning Inspectorate	August 2021 / Scoping Opinion	Table 4.5 Disturbance to onshore recreation / tourism from noise, dust and visual impact – operation 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	August 2021 / Scoping Opinion	Table 4.5 - Disturbance to onshore recreation / tourism from noise, dust and visual impact – operation The Inspectorate notes that the noise and visual impacts during operation of the Proposed Development are scoped into the 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.	Noise and visual impacts on onshore tourism and recreation during the operation phase are considered in Section 32.6. No significant residual effects related to operational noise are identified in Chapter 26 Noise and Vibration (Volume I).
Planning Inspectorate	August 2021 / Scoping Opinion	Section 4.3.1- Existing environment – coastal / marine tourism and recreation / inland tourism and recreation Figure 4.3 [of the scoping report] shows the recreational features and tourism facilities present within the Onshore Scoping Area. 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	August 2021 / Scoping Opinion	Section 4.3.2- Approach to data collection 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	The assessment methodology, as described in Section 32.4, demonstrates the data sources that have been used, as informed by stakeholder consultation.

Consultee	Date / Document	Comment	Response / where addressed in the PEIR
		this has informed the onshore and offshore assessment. 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).	Essex County Council's Highway Information Map is included as a data source.
Planning Inspectorate	August 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 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 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. 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.	Impacts on coastal and marine tourism and recreational activities are considered in Section 32.6. Chapter 15 Shipping and Navigation (Volume I) outlines the consultation that will be undertaken regarding the impacts on navigation, including recreational users, and the need for Safety Zones.
Planning Inspectorate	August 2021 / Scoping Opinion	Section 4.3.3.4 - Potential cumulative impacts The ES should include an assessment of cumulative impacts to tourism and recreation receptors that use the onshore,	Cumulative effects to tourism and recreation receptors within the onshore, coastal, and marine environments are considered in Section 32.8.

Consultee	Date / Document	Comment	Response / where addressed in the PEIR
		coastal and marine environments, not just the onshore receptors.	
Planning Inspectorate	August 2021 / Scoping Opinion	Section 4.3.4 – Approach to assessment 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. 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	August 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 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 / permanent closure of PRoW are considered in Section 32.6. A full list of PRoW crossed by the Project and an Outline PRoW Management Plan (OPRoWMP) detailing onshore construction techniques will be submitted along with the DCO application
Essex County Council	August 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. 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 / permanent closure of PRoW are considered in Section 32.6. A full list of PRoW crossed by the Project and an OPRoWMP detailing onshore construction techniques will be submitted along with the DCO application.

Consultee	Date / Document	Comment	Response / where addressed in the PEIR
Essex County Council	August 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 OWF developments, and the local tourism economy has been provided in Section 32.5.6. Wider economic effects on tourism volume and value are assessed within Chapter 31 Socio-economics (Volume I). 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	August 2021 / Scoping Opinion	Section 10.2 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 accommodation alongside create new, sustainable, quality visitor accommodation.	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 economic impacts of increase demand on accommodation are assessed in Chapter 31 Socio-economics (Volume I).
Suffolk County Council / Essex County Council	July 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	July 2021 / Seascape, Landscape and Visual Impact, Land Use, Health, Socio Economics and Tourism and	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	A literature review of people's perceptions of OWFs and their impacts on tourism and recreation has been provided as part of the baseline in Section 32.5. Perception-

Consultee	Date / Document	Comment	Response / where addressed in the PEIR
	Recreation Expert Topic Group	construction site for energy projects for the next 10 years.	related impacts are also assessed in Section 32.6.

32.3 Scope

32.3.1 Study area

32.3.1.1 Marine and coastal study area

8. The worst case extent for potential effects 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 study area has therefore been defined based on the areas where potential significant visual effects are identified in Chapter 29 Seascape, Landscape and Visual Impact Assessment (see Figure 29.1.1 (Volume II)). The following areas are included in the marine and coastal tourism and recreation study area:

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

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 zone 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.

32.3.2 Realistic worst case scenario

10. 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 potential 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 Chapter 6 EIA Methodology (Volume I).

11. 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 Chapter 5 Project Description (Volume I), which provides further details regarding specific activities and their durations.

Table 32.2 Realistic worst case scenarios

Potential impact	Parameter	Notes
Construction		
Impacts relating to offshore infrastructure	40 wind turbine generators (WTGs) with a maximum blade tip height of 397m above Mean High Water Springs (MHWS), or 72 WTGs with a maximum blade tip height of 310m above MHWS. 2 offshore substation platforms (OSP), 228km of array cable with up to 20% of the cable length requiring surface laid cable protection; 250.8km of export cable with up to 10% of the cable length requiring surface laid cable protection. Safety zones around potentially hazardous installation or works / construction area will be identified as required by the shipping and navigation assessment (Chapter 15). An estimated 15 clearance operations are predicted during preparation for construction (12 in the array areas and 3 in the offshore cable corridor). Offshore construction duration: 3 years Maximum vessels on site: 35 Vessel movements throughout construction phase: 3,090	The largest turbines represent the worst case scenario for the range of visual impacts which have informed the study area. However, the higher number of turbines represent the worst case scenario in terms of shipping and navigation impacts and therefore the consequences of both are considered in relation to tourism and recreation.
Impacts relating to the landfall	Landfall Horizontal Directional Drilling (HDD) (temporary works) physical parameters: HDD temporary works area (4 circuits) = 100 x 200m Transition joint bay size = 4 x 15m No. of transition joint bays = 4 Maximum HDD depth = 20m Maximum number of HDD = 5 Subtidal exit in 1-8m water depth	Duration includes compound establishment, HDD, transition bays, and reinstatement.
	Duration:	

Potential impact	Parameter	Notes
	13 months (of which HDD = 6 months) HDD to include 24 hour / 7 days working where required.	
	Interactions with PRoW: Landfall search area interacts with 4 PRoW and 1 NCN route	
Impacts relating to the onshore cable corridor(s)	Cable corridors construction physical parameters: Working width = 60m open trench, 82m at shallow HDD crossings, 122m at deeper HDD crossings Corridor length = 24km Cable trench width (max.) = 3.75m No. of trenches = 4 Maximum cable burial depth = 2m Minimum cable burial depth = 0.9m Haul road carriageway width = 6m Jointing bays = 80-192 (approximately every 500m) buried below ground Jointing bay construction footprint (per bay) = 13 x 5m Jointing bay depth = 2m Temporary construction compound footprint = 150 x 150m (general cable construction compounds) 100 x 100m (small cable construction compounds) No. of compounds (est.) = 7	Overall duration includes establishing / reinstating temporary construction compounds and haul roads, cable installation (trench excavation, duct installation, cable jointing), HDD (includes compound establishment, HDD and reinstatement).
	Trenchless crossings physical parameters: Maximum width of buried cable = 122m	

Potential impact	Parameter	Notes
	Maximum trenchless crossing depth = 20m Trenchless crossing compound dimensions = 80 x 120m (major crossings) 40 x 120m (minor crossings)	
	Durations: Overall duration = 18 - 24 months Cable installation = 12 months Major HDD (each location) = 8 months (of which HDD = 4 months) Minor HDD crossings = 2 months Major HDD crossings to include 24 hour / 7 days working where required.	
Impacts relating to the onshore substation	Onshore substation (temporary works) physical parameters: Permanent substation footprint = 267 x 300m Construction compound footprint = 150 x 250m	
	Durations: Construction duration = 30 months (6 months preparation works, 24 months construction)	
Impacts relating to construction traffic	Peak vehicle movements: Peak Heavy Goods Vehicle (HGV) movements = 565 HGV trips per day Peak Light Vehicle (LV) movements = 960 LV trips per day	Full details located in Chapter 27 Traffic and Transport (Volume I).
Impacts relating to accommodation for construction personnel	Peak onshore cable route and landfall construction demand = 354 Peak onshore substation construction demand = 126 Total peak onshore construction demand = 480 personnel at any one time	It is expected that during standard construction works, the onshore workforce would be an average of 329 personnel.
Operation		
	Array area:	

Potential impact	Parameter	Notes
Impacts relating to the offshore infrastructure	150km^2	
	Maximum number of WTG: 72 smallest WTG or 40 largest WTG	
	Maximum WTG tip height: Smallest WTG – 310m or Largest WTG – 397m	
	Number of offshore substation platforms (OSP): Up to 2 OSP	
	Cable repairs and reburial Reburial of c. 5km of array/interconnector cable is estimated over the life of the Project Reburial of c. 5km of export cable is estimated over the life of the Project Five array/interconnector cable repairs are estimated over the Project life. Four export cable repairs are estimated over the Project life.	
Impacts relating to the onshore cable route	Cable corridors' operational physical parameters: No. of link boxes = up to 196 Link box footprint (per box) = 1.5m^2 Cross-sectional area of cement-bound sand = 0.6m^2	
	Indicative duration of operation phase: 30 years	

Potential impact	Parameter	Notes
	Interactions with PRoW: 1 PRoW with potential for permanent land take depending on final cable routing and the location of the onshore substation.	
Impacts relating to the onshore substation	Onshore substation physical parameters: Permanent substation footprint = 267 x 300m	
	Interactions with PRoW: Onshore substation zone interacts with 2 PRoWs.	
Decommissioning		
No decision has yet been made regarding the final decommissioning policy for the North Falls infrastructure. It is also recognised that legislation and industry best practice change over time. However, the following offshore infrastructure is likely be removed, reused or recycled where practicable: • Turbines including monopile, steel jacket and GBS foundations; • OSPs including topsides and steel jacket foundations; and • Offshore cables may be removed or left *in situ* depending on available information at the time of decommissioning. The following offshore infrastructure is likely to be decommissioned *in situ* depending on available information at the time of decommissioning: • Scour protection; and • Cable protection. It is likely that the onshore project equipment, including the cable, will be removed, reused or recycled where possible 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.		

32.3.3 Summary of mitigation embedded in the design

12. 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 Chapter 4 Site Selection and Assessment of Alternatives (Volume I). The site selection process has included consideration of the following design principles: • Minimising land take where practicable (subject to environmental and engineering constraints); • Avoiding residential titles (including whole garden) where practicable; • Avoiding direct significant impacts to mature woodland and ancient woodland; • Avoiding scheduled ancient monuments and listed buildings; • 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)); • Avoiding national landscape designations (e.g. Areas of Outstanding Natural Beauty (AONB), Heritage Coast); • Avoiding important tourism destinations and recreational assets (e.g. NCN routes, caravan parks); • Minimising the number and length of trenchless crossings; • Minimising the number of crossings of utility, road, and rail lines; and • 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 Chapter 4 Site Selection and Assessment of Alternatives (Volume I).
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	Where practicable, PRoW will be kept open to minimise impacts to recreational users. Where a PRoW is crossed, a suitable diversion will be created where practicable and traffic control and other safety measures will be put in place. PRoW condition surveys

Parameter	Mitigation measures embedded into North Falls design
	will be undertaken before, during, and after the construction phase to identify any damages. Following the completion of construction works, all damages will be repaired, and PRoW will be reinstated to their original condition. Any PRoW routing through locations of permanent infrastructure will be provided with a diversion, and the existing route will be closed. An OPRoWMP will be drafted and submitted as part of the DCO application, which will include a full list of crossings and a description of onshore construction techniques at each location and other proposed mitigation measures. PRoW closures and diversions will be communicated to the relevant local authority in advance of works commencing, and information on the duration and proposed alternative routes will also be publicly circulated through site notices and the press.
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 possible. 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 area and marine works along the offshore cable corridor and around the array areas. Offshore safety zones will also be sought, and the buffer area will be drawn as appropriate, further details are given in Chapter 15, Shipping and Navigation (Volume I)
Management plans	Outline management plans which oversee construction activities and operation, and maintenance (O&M) activities will be prepared and submitted alongside the DCO application. These plans include an Outline Code of Construction Practice (OCoCP) covering construction dust, noise, vibration, and other forms of pollution, an Outline Construction Traffic Management Plan (OCTMP), an Outline Landscape and Ecological Management Strategy (OLEMS), and an Outline Landscape and Ecological Management Plan (OLEMP). The implementation of these plans will ensure the identified potential impacts of the Project are mitigated.
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 will be engaged include: • Local authorities; • Landowners; and • Local communities and businesses, including local accommodation suppliers. Consultation will also help ensure that management plans are prepared and 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

13. The assessment of likely significant effects upon tourism and recreation has been made with specific reference to the relevant National Policy Statements (NPS). These are the principal decision-making documents for Nationally Significant Infrastructure Projects (NSIPs). Those relevant to the Project are:

- Overarching NPS for Energy (EN-1) (Department of Energy and Climate Change (DECC) 2011a);
- NPS for Renewable Energy Infrastructure (EN-3) (DECC 2011b);
- NPS for Electricity Networks Infrastructure (EN-5) (DECC 2011c);
- Draft Overarching NPS for Energy (EN-1) (Department for Business, Energy and Industrial Strategy (BEIS) 2021a);
- Draft NPS for Renewable Energy Infrastructure (EN-3) (BEIS 2021b); and
- Draft NPS for Electricity Networks Infrastructure (EN-5) (BEIS 2021c).

14. The UK Government announced a review of the existing 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 (BEIS, 2021a; BEIS, 2021b; BEIS, 2021d). At the time of writing this PEIR chapter, final versions of the revised NPSs are not available.

15. 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 PEIR chapter where each is addressed.

Table 32.4 NPS assessment requirements

NPS Requirement	NPS Reference	PEIR Reference
Overarching NPS for Energy (EN-1)		
The ES (see section 4.2) should include an assessment of the effects on the coast. In particular, applicants should assess the effects of the proposed project on maintaining coastal recreation sites and features.	EN-1 section 5.5.7	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 open space, sports or recreational buildings and land. Taking account of the consultations, applicants should consider providing new or additional open space including green infrastructure, sport or recreation facilities, to substitute	EN-1 section 5.10.6	The Project will not build permanent above ground infrastructure on publicly accessible open space, sports or recreational buildings and land. Permanent land take from such assets is thus scoped out from the assessment.

NPS Requirement	NPS Reference	PEIR Reference
for any losses as a result of their proposal. 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.		
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 on tourism; and the impact of a changing influx of workers during the different construction, operation and decommissioning phases of the energy infrastructure.	EN-1 section 5.12.3	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. The socio-economic implications from tourism and recreation effects are addressed in Chapter 31 Socio-economics (Volume I).
Socio-economic impacts may be linked to other impacts, for example the visual impact of a development is considered in Section 4.9 but may also have an impact on tourism and local businesses.	EN-1 section 5.12.5	Other PEIR chapters that should be cross-referenced for tourism and recreational impacts are identified in Section 32.1. Visual impacts to tourism and recreational assets are assessed in Section 32.6.
NPS for Renewable Energy Infrastructure (EN-3)		
The potential effect on recreational craft, such as yachts, should be considered in any assessment.	EN-3 section 2.6.160	Impacts on marine and coastal tourism and recreational activities, including recreational crafts, are assessed in Section 32.6.
NPS for Electricity Networks Infrastructure (EN-5)		
EN-5 contains relevant policy in relation to the assessment of electricity networks infrastructure, however there is no information specific to this tourism and recreation chapter.		
Draft NPS for Energy (EN-1), Draft NPS for Renewable Energy Infrastructure (EN-3) and Draft NPS Electricity Networks Infrastructure (EN-5)		
There are no material changes as with the existing NPS EN-1, EN-3 and EN-5, and therefore there are no new relevant paragraphs in relation to this chapter.		

32.4.1.2 Other legislation, policy and guidance

16. In addition to the NPS, there are a number of pieces of legislation, policy and guidance applicable to the assessment of tourism and recreation.

17. 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).

18. 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).

19. Further details, where relevant, are provided in Chapter 3 Policy and Legislative Context (Volume I).

Table 32.5 Relevant local planning policies

Document	Policy / Guidance Reference	Description of Policy / Guidance	PEIR 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 Health and Wellbeing 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 (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… 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. Socio-economic aspects of tourism impacts are assessed in Chapter 31 Socio-economics (Volume I).
	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: 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;	Impacts to recreational use of the area, including open spaces, are considered in Section 32.6. Impacts to the landscape and visual amenity are discussed in Chapter 30 Landscape and Visual Assessment (Volume I).

Document	Policy / Guidance Reference	Description of Policy / Guidance	PEIR Reference
		It is demonstrated that there is no longer a demand for the existing site; The site is not appropriate for other open space functions; and The development of the site would not result in the loss of an area important to visual amenity.	
	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 Open Spaces Strategy or any future update.	Impacts to recreational use of the area, including open spaces and recreational facilities, are considered in Section 32.6.
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 to 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 to 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:	Impacts to recreational use of the area and the green infrastructure are considered in Section 32.6.

Document	Policy / Guidance Reference	Description of Policy / Guidance	PEIR Reference
		Protect existing green infrastructure, especially designated sites Improve existing green infrastructure so it is better functioning for people and wildlife Create more high-quality multi-functional green infrastructure, especially in areas of deficiency Improve the connectivity of green infrastructure for people and wildlife Increase use and inclusivity of green infrastructure across all user groups, social groups and abilities Provide green infrastructure facilities to promote health and wellbeing Working with partners to build and secure funding, effective governance and stewardship for new and existing green infrastructure to ensure their long term sustainability	Impacts to biodiversity are discussed in Chapter 23 Onshore Ecology (Volume I).
Essex Rights of Way Improvement Plan	Objectives	To reduce fragmentation in the public rights of way network To improve accessibility on the public rights of way network To stimulate tourism and the local economy	Impacts to 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. The establishment of a county coastal path will provide an opportunity for seaside tourism and coastal regeneration	Impacts to 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	PEIR Reference
		and will help to leverage the many health and environmental benefits that leisure walking can offer. Promoting rural walking networks is a key aspiration of this strategy, not just because of the personal benefits but because such 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. 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: Connects key destinations; Supports a network of recreational routes and; Caters for all users and abilities. 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 to recreational cycle routes are considered in Section 32.6.

Document	Policy / Guidance Reference	Description of Policy / Guidance	PEIR 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. 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. 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 to 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. The council will support proposals for tourism development that contribute to the broad appeal, accessibility and the year round nature of destinations across the East Suffolk area as per policy SCLP6.2.	Impacts to tourism and recreational activities are considered in Section 32.6.

Document	Policy / Guidance Reference	Description of Policy / Guidance	PEIR Reference
		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: • Enhances long term sustainability of the area • Avoids, presents, or mitigates for adverse impacts on the natural environment 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: • Renewable energy provision is encouraged within the tourism development project • Enhances the long term sustainability of the area 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 effects on protected areas as per policy SCLP2.3. 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	

Document	Policy / Guidance Reference	Description of Policy / Guidance	PEIR Reference
		road network has the capacity to accommodate the traffic generated from tourism proposals. 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: • The demand of need for tourist accommodation is clearly demonstrated • The road network is able to accommodate the volume of traffic generated without having a significant adverse impact on traffic of highway safety • Covered cycle storage, proportionate to the size of the site that is being delivered. 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 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. 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.	Impacts to tourism and recreational activities with 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.	

Document	Policy / Guidance Reference	Description of Policy / Guidance	PEIR Reference
		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. Develop the Suffolk coast brand and create funding avenue opportunities into marketing and building on Suffolk's digital capabilities to create greater visibility for tourists.	The need for the Project and benefits of it in contributing to international and national United Kingdom (UK) policy commitments for renewable energy, as well as wider policy objectives for UK energy security, decarbonisation and the economy are outlined in Chapter 2 Need for the Project (Volume I). The legislative context is outlined in Chapter 3 Policy and Legislative Context (Volume I) of this PEIR.
	Priority 5: Our Partnerships	To improve the performance of the visitor economy through progressive and active partnership collaboration. 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. Explore the potential of the green tourism business scheme. The development of sustainable transport methods to both residents and tourists in order to promote the visitor economy.	
Waveney Local Plan 2019	New self-catering tourist accommodation	Applications for new self-catering tourism development will have different criteria dependant on the scale of the	Impacts to accommodation are considered in Section 32.6

Document	Policy / Guidance Reference	Description of Policy / Guidance	PEIR Reference
	New hotels and guest houses	accommodation development. Large sites (80 units+) are required to be in or close to Lowestoft, they must have safe and convenient access to public transport, recreational, commercial and entertainment facilities must be provided on site as per policy WLP8.15. New hotels and guest houses will be supported in town centres and also seafront locations in Corton, Lowestoft, Kessingland and Southwold.	
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 to tourism and recreational activities are considered in Section 32.6

32.4.1.2.1 National and regional policy and strategy documents

20. There are also a number of national and regional policy documents that are important to recognise, the most relevant of which are listed below:

- Tourism Sector Deal (Department for Business, Energy and Industrial Strategy and Department for Digital, Culture, Media and Sport, 2019): This builds on the UK Industrial Strategy by creating a framework which positions the tourism industry to take advantage of new markets whilst also leveraging initiatives designed to deliver the Strategy's Grand Challenges relating to the data driven economy, clean growth and ageing society. The Tourism Sector Deal sets out an ambitious agenda that will deliver increases in productivity and investment that will benefit local economies across the country. It introduces the concept of Tourism Zones, bringing together businesses and local organisations to establish a co-ordinated strategy for growth and sustaining visitor numbers throughout the off-season. By 2025, the Tourism Sector Deal aims to: More than double the size of the industry nationally to £268 billion; Grow employment in the sector to 3.8 million; and deliver a 1% increase in productivity worth £12 billion to the national economy.
- The Tourism Recovery Plan. (Department for Digital, Culture, Media and Sport, 2021): Oxford Economics does not predict tourism in the UK to return in full to 2019 levels of volume and expenditure until 2025. 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. It also sets out a framework for how the government will work with the sector to build back better. The aims of the strategy were to:
    - Recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound visitor numbers and spend by the end of 2023 – both at least a year faster than independent forecasts predict.
    - Ensure that the sector's recovery benefits every nation and region, with visitors staying longer, growing accommodation occupancy rates in the off-season and high levels of investment in tourism products and transport infrastructure.
    - Build back better with a more innovative and resilient industry, maximising the potential for technology and data to enhance the visitor experience and employing more UK nationals in year-round quality jobs.
    - Ensure the tourism sector contributes to the enhancement and conservation of the country's cultural, natural and historic heritage, minimises damage to the environment and is inclusive and accessible to all.
    - Return the UK swiftly to its pre-pandemic position as a leading European destination for hosting business events.
- Norfolk and Suffolk Covid-19 sector specific Visitor Economy Plan: New Anglia LEP published a recovery plan than was targeted at the Visitor Economy, A Recovery Plan for the Visitor Economy (New Anglia LEP, 2020). Much of the plan was focused on the short to medium response to the pandemic, however the plan also set in place how the sector would

renew after Autumn 2020.The recovery plan laid the foundations for a Tourism Zone bid, as well as helping achieve targets set out in the Economic Strategy and delivering the interventions in the draft Local Industrial Strategy.

- 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 sources

21. 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
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

Data Source	Data Set	Spatial Coverage	Year
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
Sustran's 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
Finstrokes dive map	Source of dive site information for scuba divers.	UK	2022

32.4.3 Impact assessment methodology

22. Chapter 6 EIA Methodology (Volume I) 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.

23. There are no specific statutory guidelines that inform the assessment of development effects upon tourism and recreation receptors. The approach taken uses expert judgement informed by evidence from the offshore wind industry and is based on best 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 Chapter 6 EIA Methodology (Volume I) within this PEIR for further details.

24. 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.

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

32.4.3.1 Definitions for tourism and recreation receptors

26. 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 judgment. These expert judgements are guided by the conceptual understanding of the baseline conditions.

32.4.3.1.1 Sensitivity and value

27. The sensitivity of a receptor (Table 32.7) is dependent upon its:

- Tolerance: the extent to which the receptor can withstand or absorb an impact;
- Adaptability: the ability of the receptor to change in order to suit different conditions and avoid adverse impacts that would otherwise arise;
- Recoverability: a measure of a receptor's ability to return to a state at, or close to, that which existed before the impact caused a change; and
- Substitutability: the extent to which activities or amenities provided by the receptor can be found elsewhere within the area.

Table 32.7 Sensitivity of tourism and recreation receptors

Sensitivity	Definition
High	Tourism or recreational activities with very limited tolerance of change in the visitor or local economy of Essex and East Suffolk; Unable to adapt to different conditions; Tourism or recreational activity unable to recover, resulting in permanent or long term change (>10 years); and Tourism or recreational activity with no comparable substitutes.
Medium	Tourism or recreational activities with limited tolerance of change in the visitor or local economy of Essex and East Suffolk; Limited ability to adapt to different conditions; and Tourism or recreational activity able to recover over the medium term (5-10 years). Tourism or recreational activity with limited substitutes.
Low	Tourism or recreational activities with some tolerance of change in the visitor or local economy of Essex and East Suffolk; Mostly able to adapt to different condition; Tourism or recreational activity able to recover to an acceptable status over the short term (1-5 years); and Tourism or recreational activity with some substitutes.
Negligible	Tourism or recreational activities generally tolerant of change in the visitor or local economy of Essex and East Suffolk; Able to adapt to different conditions; Tourism or recreational activity able to recover to an acceptable status almost immediately (less than one year); and

Sensitivity	Definition
	Tourism or recreational activity with ample substitutes.

28. In addition, a value component may also be considered when assessing a receptor (Table 32.8). This ascribes whether the receptor is rare, protected, or threatened. However, sensitivity and value definitions are not necessarily linked for a particular receptor, and it is thus important not to inflate effect significance specifically because a feature has high value.

Table 32.8 Value of tourism and recreation receptors

Value	Definition
High	Tourism or recreational activity of national or international importance. Likely to have minimal potential for substitution. May also be of significant wider-scale, functional or strategic importance.
Medium	Tourism or recreational activity of regional importance.
Low	Tourism or recreational activity of local importance.
Negligible	Tourism or recreational activity not deemed of importance.

32.4.3.1.2 Magnitude

29. The magnitude of the impact (Table 32.9) is assessed according to:

- The findings of other relevant chapters which affect the visitor experience (e.g. visual effects, noise, air quality);
- The extent of the area subject to a predicted impact;
- The duration, timing, and frequency of the impact; and / or
- Whether the impact is reversible, with recovery through natural or spontaneous regeneration or through the implementation of mitigation measures, or irreversible, when no recovery is possible within a reasonable timescale or there is no intention to reverse the impact.

Table 32.9 Magnitude of tourism and recreation impacts

Magnitude	Definition
High	Highly likely that majority of visitors and tourists would change their behaviour; Large spatial extent (i.e. impacting at the county level); Permanent or long term duration (i.e. throughout and beyond the proposed scheme construction); and / or Very frequent / constant occurrence (i.e. very likely or definite).
Medium	Likely that some visitors and tourists would change their behaviour; Medium spatial scale (i.e. impacting at the district level); Medium-term duration (i.e. throughout the proposed scheme construction); and / or Frequent occurrence (i.e. likely).
Low	Plausible that some visitors may change their behaviour;

Magnitude	Definition
	Small spatial scale (i.e. impacting at the town or village level); Short term duration (i.e. part of the proposed scheme construction); and / or Infrequent occurrence (i.e. unlikely).
Negligible	Unlikely that the majority of visitors and tourists would change their behaviour; Small spatial scale (i.e. impacting at a local level); Very short term duration (i.e. part of the proposed scheme construction); and / or Very infrequent occurrence (i.e. very unlikely).

32.4.3.1.3 Significance of effect

30. The significance of an effect is a function of the sensitivity of the receptor and the magnitude of the impact (see Chapter 6 EIA Methodology (Volume I) for further details). The determination of significance is guided by the use of a significance of effect matrix, as shown in Table 32.10. Definitions of each level of significance are provided in Table 32.11.

31. Likely significant effects identified within the assessment as major or moderate are regarded within this chapter as significant and have been avoided or reduced through mitigation where practicable. In addition, whilst negligible and minor impacts are not significant in their own right, it is important to distinguish these from no change, as they may contribute to significant effects cumulatively or through interactions.

Table 32.10 Significance of effect matrix

		Adverse magnitude			Beneficial magnitude				
		High	Medium	Low	Negligible	Negligible	Low	Medium	High
Sensitivity	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 32.11 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

32. The CEA considers other plans, projects and activities that may result in cumulation with North Falls. Chapter 6 EIA Methodology (Volume I) provides further details of the general framework and approach to the CEA.

33. 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. I

32.4.5 Transboundary effects assessment methodology

34. 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. Chapter 6 EIA Methodology (Volume I) provides further details of the general framework and approach to the assessment of transboundary effects.

35. 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

36. 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.

37. A summary of tourism perception of OWFs 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 best evidence is typically found in studies of existing OWFs rather than those prior to consenting/construction. However, the relatively few studies relating to existing OWFs is a key limitation in the evidence base, data will be reviewed once more for the purposes of the ES, to further add to the evidence base, if available.

38. The most up-to-date information publicly available has been used in the preparation of the baseline of the existing tourism and recreation environment within the relevant study areas. 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.

39. 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[1].

40. Furthermore, there is no quantitative data available for recreational usage of most PRoW, including cycle routes, the 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. In addition, PRoW included within the baseline and impact assessment are limited to those crossed by the onshore project area. As the access strategy is still being developed, PRoW crossed by haul roads will be considered in the ES and OPRoWMP.

41. The most recent available data for accommodation supply in Essex is from a 2016 Accommodation Stock Audit conducted by Visit Britain. It should be noted that a considerable number of years has passed between then and the assessment period, and the number of accommodations, rooms, and bedspaces may not be wholly representative of today's conditions.

42. An important caveat to a tourism and recreation assessment is the inability to fully predict the recovery trajectory of the local tourism sector. The visitor economy experienced an unprecedented shock during the coronavirus pandemic, and there are still uncertainties surrounding changes in visitor volumes and visiting patterns, the trend back towards pre-pandemic levels, the speed with which this will happen, and any permanent changes to the sector. Similarly, it is unclear how the pandemic has influenced patterns and quantities of outdoor recreation and whether these changes would persist in the long term. Moreover, there is potential that the ongoing inflation crisis would curtail the recovery of the tourism sector, but this has yet to be empirically observed or studied.

43. 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

[1] 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.

ongoing community engagement as part of the Project development is supporting North Falls' understanding of these potential effects.

44. Visitor surveys provide useful evidence to understand the characteristics of visitors to the 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 do not appear to be available publicly. Should more information on visitor characteristics become available after the PEIR consultation and before the production of the ES, then this will be considered in the ES.

32.5 Existing environment

93. 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 Tourism in Essex

94. The tourism industry is important for supporting employment across Essex where it accounted for 7.4% of all employment in 2021 (Visit Essex, 2022). It is especially important to the Tendring District in which the sector is worth almost £402 million and accounts for 17.9% of employment (Tendring District Council, 2021).

95. 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).

96. 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).

97. 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).

98. 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).

32.5.1.1 Tourism statistics in Essex

99. Visit Essex publishes annual Economic Impact of Tourism studies for Essex, which illustrate key trends in tourism volumes and expenditures over recent years. In 2021 tourism in Essex supported over 50,511 jobs (7.4% of all employment) and contributed roughly £2.4 billion to the county's economy. This figure reflects ongoing disruption to the tourism economy at the time from the global coronavirus pandemic, and although greater than the figures for 2020, the 2021 figures are smaller when compared to previous years. A decline in the number of trips and total expenditure can be observed in Table 32.12. There is a consensus that recovery in the tourism sector will be segmented and gradual.

100. Due to post-coronavirus pandemic data being currently unavailable, as a worst case baseline data from the most recent pre-pandemic year (2019) has been used as the baseline year for the assessment described in this chapter. For context, data from 2020 and 2021 is also described in the remainder of this baseline section.

Table 32.12 Tourism trends in Essex (source Destination Research 2018; 2019; 2020; 2021; 2022)

	2017	2018	2019	2020	2021
Number of day trips	52,482,216	53,106,003	51,359,367	26,432,000	37,188,000
Day trip expenditure (£)	1,941,117,727	2,012,921,488	2,120,464,529	963,555,000	1,478,177,000
Number of overnight stay trips	2,493,000	2,406,000	2,335,000	1,009,000	1,501,000
Overnight stay expenditure (£)	439,316,000	423,756,000	431,617,000	169,813,00	241,222,000
Total number of trips	54,975,216	55,512,003	53,694,367	27,441,000	38,689,000
Total expenditure (£)	2,456,541,150	2,523,617,150	2,618,318,550	1,171,790,843	1,783,362,955
Induced spend (£)	859,847,000	879,068,000	917,201,000	426,373,000	634,520,000
Tourism value (£)	3,316,388,150	3,402,685,150	3,535,519,550	1,598,163,843	2,417,882,955
Total tourism employment (number of people)	64,649	66,318	69,054	44,596	50,511
Proportion of employment in Essex County (%)	9.4	9.6	10.0	6.5	7.4

101. The most recent Destination Research report (2022) also provides an overview of the seasonality of tourism in Essex (Plate 32.1). There is a general increase

in both day and overnight trips across the summer months, as can be expected. Compared to 2019, during 2020 there is an expenditure spike in between January and February 2020, which then declines steeply around late March when the first national lockdown was announced. Decreases observed after the summer months coincide with tightening social gathering restrictions and the announcement of the second national lockdown in November 2020. Similarly, data for 2021 reflects the prevailing social distancing restrictions in place throughout the year, including the national lockdown between January and March, with restrictions of some kind remaining in place until June. Data for 2019 therefore remains the most recent data reflective of 'normal' conditions available.

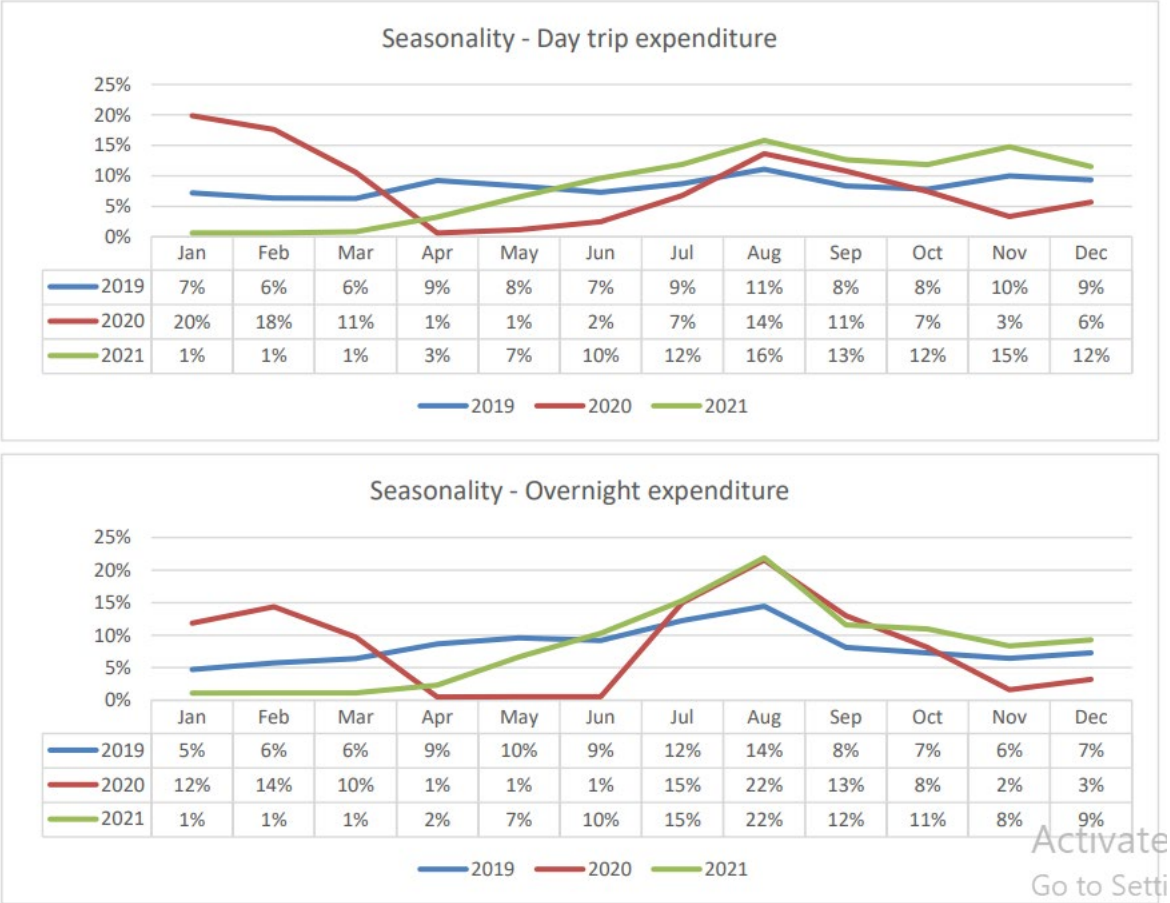

Plate 32.1 Seasonality of tourism in Essex (Destination Research, 2022)

102. As shown in Plate 32.2, the split between tourists coming on holiday and staying in paid accommodation compared to staying with friends/relatives or at a second home is fairly even (53% compared to 46%). The majority of their expenditure is on food and drink (40%) and shopping (29%).

103. The report also allows for comparisons to be made between domestic and international tourism (including overnight and day trips). By expenditure, the top three accommodation types for domestic tourists are serviced accommodation (58%), friends and relatives (24%), and static caravans (8%). In contrast, the majority of international tourists tend to stay with friends and relatives (68%).

104. In terms of expenditure categories, overnight tourists tend to spend the most on accommodation (31%), followed by food and drink (27%) and travel (19%). In comparison, day trippers spend the most on food and drink (42%), followed by shopping (31%) and travel (15%).

105. Visit Essex has also produced a 'Recovery Plan for the Essex Tourism and Hospitality Industry', given that 60% of the £3.4 billion industry was estimated to have been lost due to the coronavirus pandemic. The plan sets out how Visit Essex intends on supporting businesses to prepare for recovery and sustainable tourism in the future. National forecasts suggest that domestic tourism will recover to 2019 levels by the end of 2022 (Visit Essex, 2021). The most up to date information available will be included in the ES.

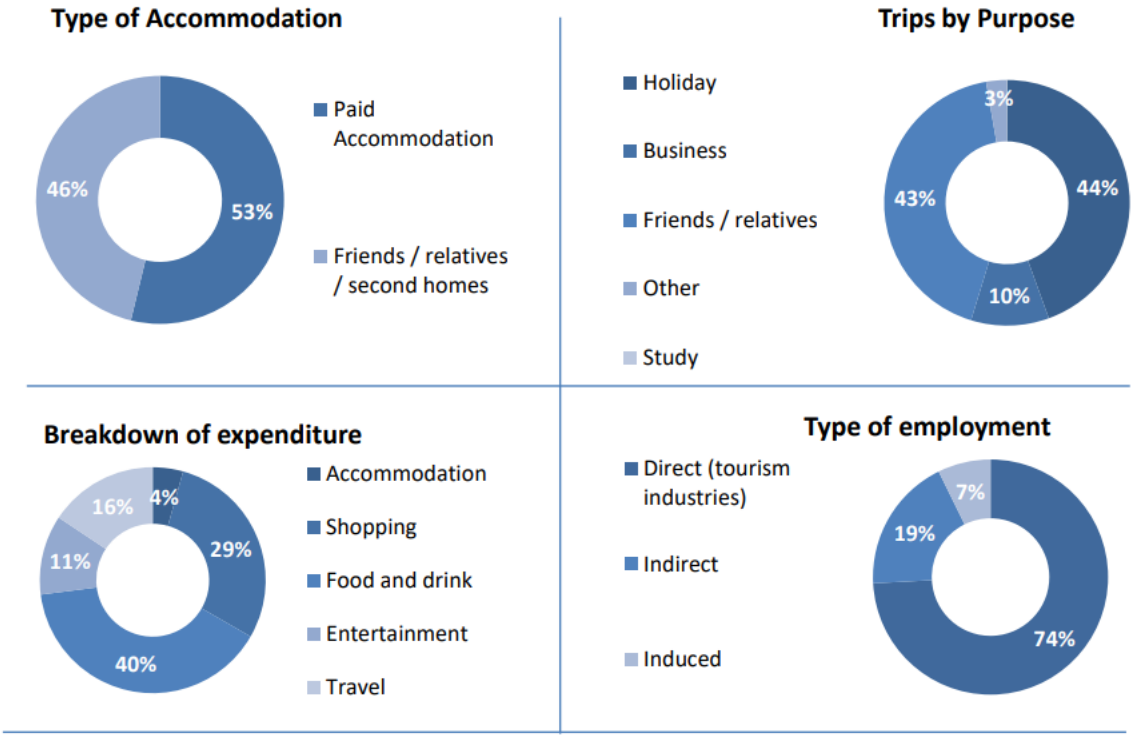

Plate 32.2 Breakdown of tourism activity in Essex (Destination Research, 2022)

106. The data in the visitor economic impact reports (Destination Research, 2022) shows the main reasons for visiting Essex are for holiday purposes and visiting friends and family. However, when broken down there are differences between day visits and overnight visits, and between domestic and overseas visitors with overseas and overnight visitors more likely to be visiting friends and family.

107. Table 32.13 shows that the number of trips made into Essex has decreased by 49% between 2019 and 2020, before rebounding by 41% in 2021, although still remaining 27% below pre-pandemic levels. In 2021, urban visits were the most popular reason for visiting Essex (21.7 million visits), followed by countryside visits (9.5 million visits) and then coastal visits (5.9 million visits). Urban visits also accounted for the largest share of expenditure by tourists (£937.6 million). There has been a 30% fall in visitor expenditure between 2019 and 2021 which can be attributed to the Covid-19 pandemic.

Table 32.13 Type of visits in Essex (Economic Impact of Tourism in Essex, 2022)

Type of Visit	2019		2020		2021	
	No. of Trips	Spend (£)	No. of Trips	Spend (£)	No. of Trips	Spend (£)
Urban Visits	30,102,000	1,348,906,000	17,095,000	667,664,000	21,720,000	937,561,000
Country-side Visits	12,886,000	460,009,000	5,260,000	163,651,000	9,520,000	327,361,000
Coastal Visits	8,371,367	311,549,529	4,077,000	132,240,000	5,948,000	213,255,000
Total	51,359,367	2,120,464,529	26,432,000	963,555,000	37,188,000	1,478,177,000
Difference (from previous year)	n/a	n/a	-49%	-55%	+41%	+53%

32.5.2 Tourism in East Suffolk

108. Tourism plays a significant role in driving the local economy in 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, making it a tourist hub for the county (East Suffolk Council, 2022b).

109. 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 by nature. The district is home to the UK's most easterly point and 1,655 beach huts. There are also a number of historical hamlets and distinctive seaside and market towns along the Suffolk coast such as Aldeburgh, Lowestoft, and Southwold (East Suffolk Council, 2022a).

110. Suffolk also has a rich history and heritage, with more than 20 museums, four castles, and over 200 churches. Some notable destinations include Snape Maltings, the Anglo-Saxon burial grounds of Sutton Hoo, and Framlingham Castle. Another distinctive feature of the region is its unique landscape with several designated sites such as Suffolk Coast and Heaths AONB, the Southern Gateway to the Broads National Park, and Carlton Marshes Nature Reserve (Visit Suffolk, 2022).

111. The majority of tourists visiting East Suffolk originates 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).

112. 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).

32.5.2.1 Tourism statistics in East Suffolk

113. East Suffolk District Council publishes annual Economic Impact of Tourism reports (summarised in Table 32.14). Based on the 2021 findings, tourism in East Suffolk supported 11,473 jobs (11.8% of all employment) and was worth roughly £466 million, forming one third of the county's total tourism value. However, as was the case in Essex, these figures also reflect disruptions associated with the coronavirus pandemic. Pre-pandemic, the value of the tourism sector in East Suffolk District was £700 million, with the tourism sector representing 14.3-15.1% if all employment (East Suffolk Council, 2022). A decline in number of trips and expenditures is represented within Table 32.14.

Table 32.14 Tourism trends in East Suffolk (Destination Research, 2018a; 2019a; 2020a; 2021a; 2022a)

	2017	2018	2019	2020	2021
Number of day trips	11,335,000	12,014,000	11,777,000	5,133,000	7,856,000
Day trip expenditure (£)	340,160,000	357,345,000	371,087,000	147,596,000	239,383,000
Number of overnight stay trips	717,000	686,000	701.000	316,000	478,000
Overnight stay expenditure (£)	150.595,000	145,231,000	151,195,000	64,271,000	100,477,000
Total number of trips	12,052,000	12,700,000	12,478,000	5,449,000	8,334,000
Total expenditure (£)	490,755,000	508,178,000	524,988,000	221,408,000	349,888,000
Induced spend (£)	167,106,000	163,532,000	170,199,000	75,884,000	115,660,000
Tourism value (£)	657,861,000	671,710,000	695,187,000	297,292,000	465,548,000
Total tourism employment (number of people)	13,880	14,153	14,660	9,026	11,473
Proportion of employment in Essex County (%)	14.3	14.6	15.1	9.3	11.8

114. Seasonality trends for day and overnight trips in East Suffolk (Plate 32.3) are also comparable to those observed in Essex, with expenditures peaking over the summer months and periods of decline around late March and September 2020 and during January to March 2021, coinciding with tightening social gathering restrictions and national lockdowns.

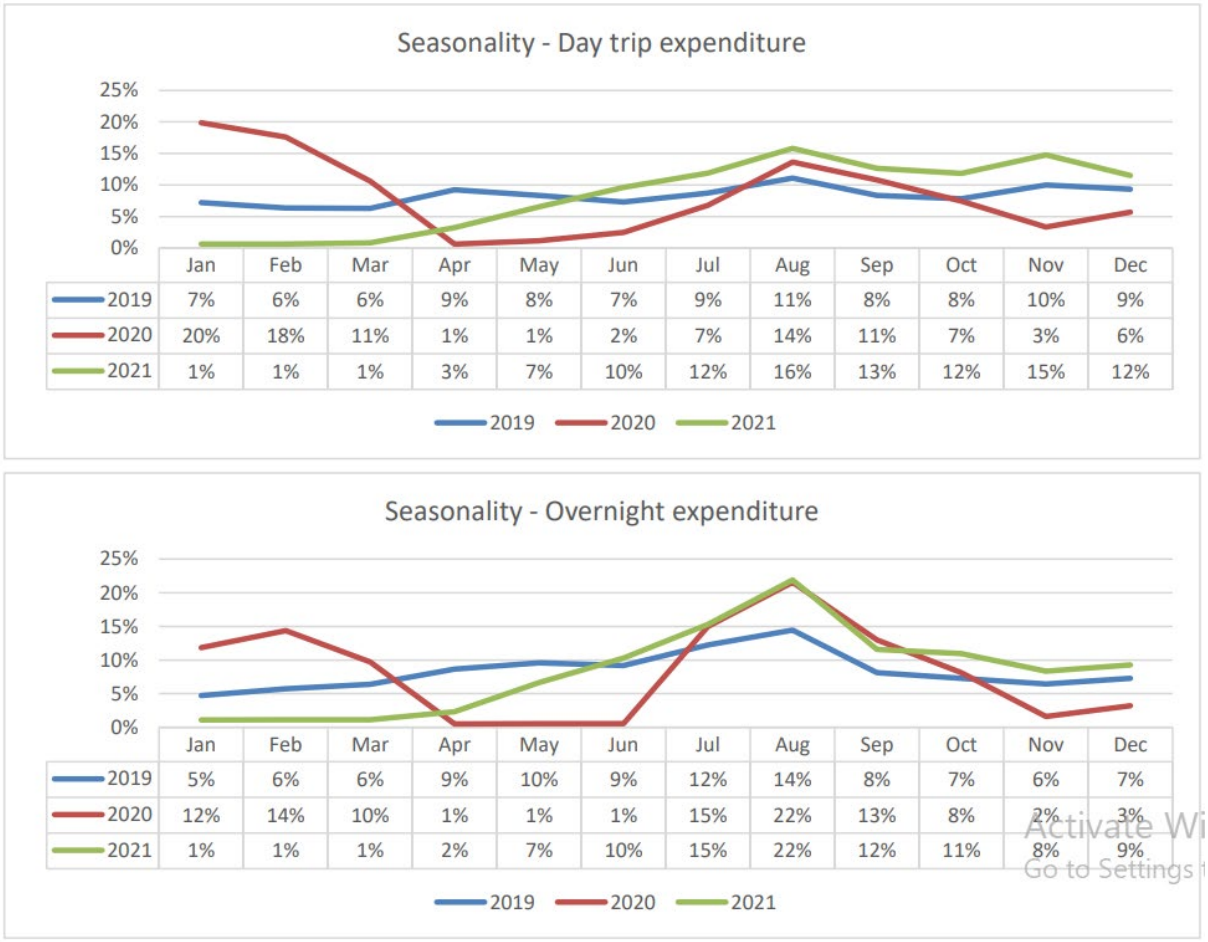

Plate 32.3 Seasonality of tourism in East Suffolk (Destination Research, 2022a)

115. As seen in Plate 32.4, the majority of tourists coming on holiday tend to stay in paid accommodation compared to staying with friends/relatives or at a second home (70% compared to 27%). A breakdown of their expenditure indicates that the majority of spending goes towards food and drink (40%) and shopping (21%).

116. By expenditure, the top three accommodation types for domestic tourists are serviced accommodation (32%), static caravans (17%), and self-catering (12%). In contrast, most international tourists tend to stay with friends and relatives (32%), followed by serviced accommodation (24%) and self-catering (21%).

117. With respect to expenditure categories, overnight tourists tend to, as expected, spend the most on accommodation (31%), followed by food and drink (29%) and travel (17%). In comparison, day trippers spend the most on food and drink (44%), followed by shopping (24%) and travel (20%).

118. Similar to Essex, the coronavirus pandemic had a significant impact on the tourism economy in East Suffolk, with a decline in value of more than 57% during 2020 compared to pre-pandemic levels. However, there is evidence that recovery and mitigation measures implemented by East Suffolk Council have succeeded in stabilising the sector. The number of companies involved with accommodation and food services and arts, entertainment, and other services

have remained stable between 2019 and 2021, while a small decline of 4% was observed for retail businesses over the same period. There is also evidence that the tourism sector is now experiencing a revival from the 'staycation' boom in which UK nationals are choosing to holiday at home rather than travel abroad. This boom is predicted to have continued in 2022, with 23% of tourism businesses expected to bounce back to pre-pandemic levels in 2022 and 46% expected to perform even better than in 2019 (East Suffolk Council, 2022). Tourism statistics for 2022 to confirm this are not yet available at the time of writing.

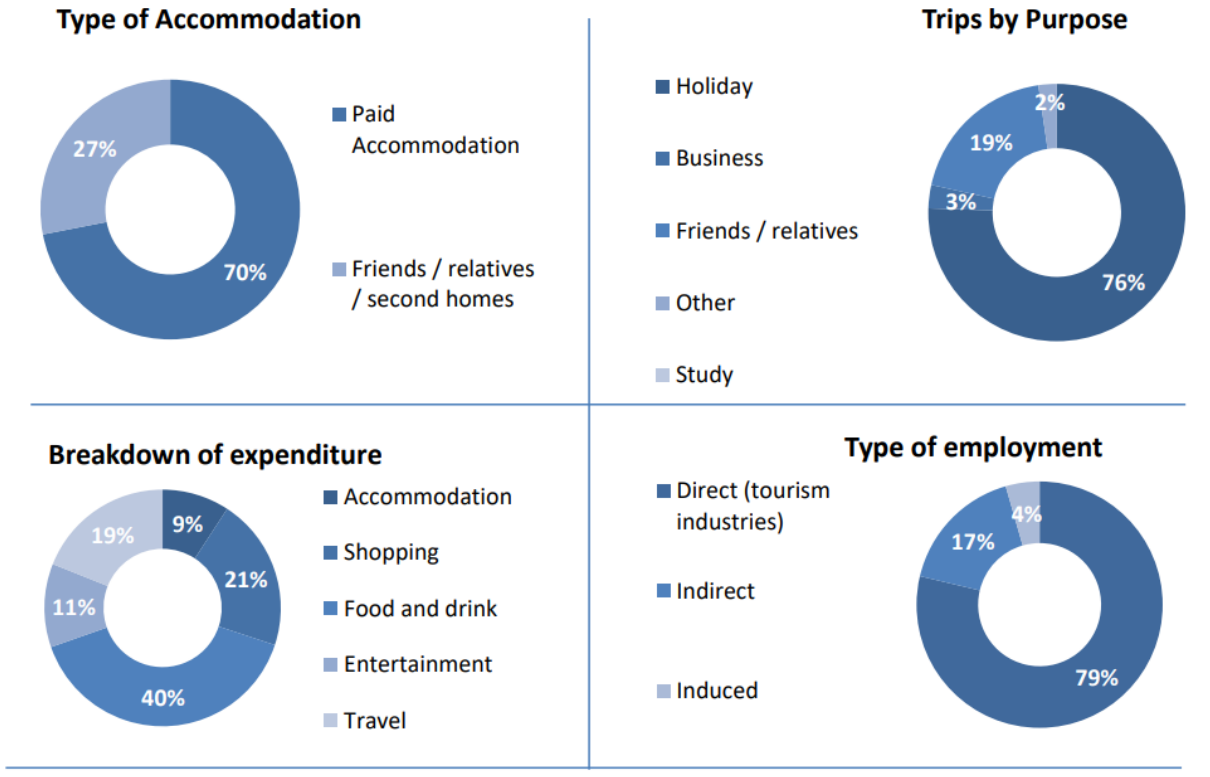

Plate 32.4 Breakdown of tourism activity in East Suffolk (Destination Research, 2020a)

119. The data in the visitor economic impact report shows main reasons for visiting East Suffolk are for holiday purposes and visiting friends and family. However, when broken down there are differences between day visits and overnight visits, and between domestic and overseas visitors with overseas and overnight visitors more likely to be visiting friends and family.

120. Table 32.15 shows that between 2019 and 2020, the number of visits made by tourists into East Suffolk decreased by 56% from 11.78 million visits in 2019 to 5.13 million visits in 2020 due to the Covid pandemic. This was also reflected in tourism expenditure which decreased by 60%. There was a partial recovery in 2021, however both the number of trips and the value of visitor expenditure is still well below pre-pandemic levels.

121. Coastal visits were the most popular reason for visiting East Suffolk in 2021 (2.95 million visits) followed by urban visits (2.84 million visits). However, urban visits accounted for the largest share of expenditure by tourists (£95 million).

Table 32.15 Types of visits in East Suffolk (Destination Research, 2022a)

Type of Visit	2019		2020		2021	
	No. of Trips and %	Spend (£)	No. of Trips and %	Spend (£)	No. of Trips and %	Spend(£)
Urban Visits	3,901,000	135,573,000	1,967,000	61,884,000	2,841,000	95,038,000
Countryside Visits	3,180,000	£95,084,000	1,319,000	35,699,000	2,061,000	£59,323,000
Coastal Visits	4,696,000	140,430,000	1,847,000	50,013,000	2,954,000	85,022,000
Total	11,777,000	371,087,000	5,133,000	147,596,000	7,856,000	239,383,000
Difference	n/a	n/a	-56%	-60%	53%	62%

32.5.3 Characteristics of visitors to Essex and Suffolk

122. 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 Table 32.16).

123. 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.

124. 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 AONB and coastal towns and villages, walking on coastal footpaths and viewing wildlife.

125. 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:

32.5.3.1 Essex Visitor Survey

32.5.3.1.1 Methodology

- Online survey (sample: 1000);
- Respondents taken at least one day trip or short break to Essex in the past 2 years; and

- Quotas 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%);
- Most trips took place during the main summer tourism season – peaking in July;
- 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

- 403 face to face interviews; and
- Random sample of visitors in key locations across the three destinations between July and September 2012.

32.5.3.2.2 Key relevant points

- The average group size was 3.6 people, comprising of 2.5 adults and 1.1 children. Adults account 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 we used the local car parks;
- Positive aspects of visits to Clacton and Walton included:
  - Beach, seafront or sea air;
  - Pier / arcade / amusements;
  - Good for children and families and
  - Good or friendly atmosphere and the high levels of cleanliness.
- Visitors to Harwich positive aspects to their visit:
  - Historic aspect of Harwich, including the old buildings and the naval history;
  - Cleanliness;
  - Good range of food and drink options;
  - Quiet and relaxing destination and not too commercial; and
  - The pier and the passing of boats, ferries and cruise liners, the harbour area and the container port.
- Negative aspects to visits included:
  - Parking - too expensive / lack of spaces;
  - Access to get into the area; and
  - Some found the area to be a bit run down or scruffy and others found the area to be not clean enough.

32.5.3.2.3 Conclusion of visitor characteristics

126. Overall, there is no evidence to suggest that the characteristics of visitors to Suffolk and Essex would make them more sensitive to OWF development compared to visitors who visit other similar coastal areas across the UK. This conclusion is based on professional judgement following a review of the characteristics of visitors to the area.

32.5.4 Assets

32.5.4.1 Popular tourism assets across Essex and Suffolk

127. The ten most popular attractions across the Essex and Suffolk counties jointly generated close to 4.1 million visits in 2021. However, the majority of the most popular tourist attractions are located inland outside of the study area for North Falls tourism impacts. In particular, West Suffolk is home to 4 of the 10 most visited tourist attractions across Essex and Suffolk. Of the attractions listed below 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).

Table 32.16 Popular visitor attractions

Name of visitor attraction	Location	Visitor numbers and nature of tourism offer
Abbey Gardens	West Suffolk, Suffolk (Approximately 60km inland - outside of the marine and coastal and onshore study areas)	Visitor Numbers 2021: **1,276,864** The Abbey Gardens based in Bury St Edmunds attracts visitors for its historical Benedictine monastery, the Appleby rose garden, a water garden, a sensory garden, the Pilgrim's herb garden and a riverside which was historically used as a power supply and trading route. The gardens are popular among less-able visitors as well as for young children with the gardens containing a wildlife feeding area[2].
Clacton Pier	Tendring, Essex (Within the marine and coastal study area)	Visitor Numbers 2021: **741,000** Clacton pier is officially the largest pleasure pier in the U.K covering 6.5 acres. The pier hosts a variety of entertainment facilities including a pleasure pier, arcades, Princes and West Cliff theatres, golf courses and water sports facilities [3]. 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. Further inland from Clacton boasts rural towns and villages and countryside landscapes which are easily accessible with walking and cycling routes.
High Lodge Forest Centre	West Suffolk, Suffolk (Approximately 70 km inland - outside of the marine and coastal and onshore study areas)	Visitor Numbers 2021: **537,098** Based in Thetford Forest there are outdoor recreational areas situated across the forest, with mountain bike trails for visitors. Additionally, there are 8 barbecue stands across the High lodge, an adventure golf site, archery classes and outdoor survival classes. The centre includes the heritage trail which is funded by the Heritage Lottery Fund allowing all visitors to enjoy and visit the forest[4].
RHS Garden Hyde Hall	Chelmsford, Essex (Approximately 25 km inland - outside of the marine and coastal and onshore study areas)	Visitor Numbers 2021: **410,898** Located just outside of Chelmsford in rural Essex the RHS Garden Hyde Hall offers 365 acres of varying garden styles. Hyde Hall consists of a dry garden, hilltop garden, winter garden and a growth vegetable garden[5].

[2] Abbey Gardens (westsuffolk.gov.uk)
[3] Clacton-on-Sea - Visit Essex
[4] High Lodge | Forestry England
[5] Plan your visit to Hyde Hall / RHS Gardening

Name of visitor attraction	Location	Visitor numbers and nature of tourism offer
Needham Lake and Nature Reserve	Mid-Suffolk, Suffolk (Approximately 35km inland - outside of the marine and coastal and onshore study areas)	Visitor Numbers 2021: **390,212** On the outskirts of Needham Market the Needham Lake and nature reserve is characterised by the surfaced pathway that goes across the local nature reserve for all visitors to enjoy the wildlife[6]. There are permits available for outdoor activities such as fishing and model boating. Additionally, there are guided walks across the River Gipping which is popular among visitors.
Ickworth House, Park and Gardens	West Suffolk, Suffolk (Approximately 65 km inland - outside of the marine and coastal and onshore study areas)	Visitor Numbers 2021: **263,273** Ickworth House Park and Gardens has a range of attractions including the Rotunda House, which is famous for internationally renowned art and silver, an Italianate Garden encircling the Rotunda, ancient woodlands and miles of parkland with an all-weather multi-use trail. Moreover, visitors can stay overnight in the holiday cottages and the Ickworth stately house hotel open to non-residents and residents[7].
Audley End House and Gardens	Uttlesford, Essex (Approximately 75 km inland - outside of the marine and coastal and onshore study areas)	Visitor Numbers 2021: **167,347** The popular mansion house is one of the largest and most opulent houses in Jacobean England. Audley house is steeped in history dating back to the late 17th century. Visitors are able to walk and view the interiors, dressing rooms, state apartments and the 18th century gothic chapel[8]. Visitors can view the Braybrooke's unique natural history collection, lakes and gardens and acres of parkland with trees dating back to 1762. Visitors can experience the life of a Victorian servant and learn about Victorian history as well as visiting the 1830's nursery wing, young children can visit the Victorian stable block and its horses.
Brandon Country Park	West Suffolk, Suffolk (Approximately 75 km inland - outside of the marine and coastal and onshore study areas)	Visitor Numbers 2021: **155,470** Brandon Country Park is based in Thetford Forest. The country park is famous for its dark forests, sandy soils, open heathlands and iconic belts of pine trees that straddle between the Suffolk and Norfolk border[9]. These characteristics form the 30 acres of parkland, visitors can also walk across the lawns and pond as well as the "haunted" mausoleum.

[6] Needham Lake and Nature Reserve | Visit Suffolk
[7] Ickworth Estate | Suffolk | National Trust
[8] Audley End House and Gardens Things to do | English Heritage (english-heritage.org.uk)
[9] Brandon Country Park (westsuffolk.gov.uk)

Name of visitor attraction	Location	Visitor numbers and nature of tourism offer
Sutton Hoo Anglo-Saxon Burial Mounds	Suffolk Coast and Heaths AONB, East Suffolk, Suffolk (Approximately 10 km inland - outside of the marine and coastal and onshore study areas)	Visitor Numbers 2021: **123,631** The Sutton Hoo burial site includes 18 burial mounds which date to the 7th century AD. Visitors can enjoy the views over the River Deben on the river view walk, or the view from the 17 metre viewing tower. Top visitor features outside of the burial site and viewing tower include the High Hall exhibition featuring historical Anglo-Saxon artefacts and objects as well as Tranmer House which displays the archaeological work that surrounds Sutton Hoo[10].
RSPB Minsmere Nature Reserve	Suffolk Coast and Heaths AONB, East Suffolk, Suffolk (Within the marine and coastal study area)	Visitor Numbers 2021: **75,000** Characterised by the several miles of Suffolk countryside visitors can view coastal and wetland scenery which hosts a wide variety of wildlife. The RSPB countryside walks allows visitors to have guided walks and visit the RSPB shop and café which sells locally sourced commodities. Families and youth groups can explore the Wildzone discovering Minsmere's wildlife. [11]

32.5.4.2 Marine tourism and recreation assets

128. As the array areas are located approximately 22.5km (12.1 nautical miles) from the coast (at the closest point), tourism and recreational activities surrounding the array areas 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

129. 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

130. There are five sailing and yachting clubs on the Tendring coastline near the landfall search area. Further away from the landfall search area, 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 32.17 and are shown graphically in Figure 32.2 (Volume II). Several of these clubs offer yachts, powerboats, and motor cruisers that would be capable of travelling far enough offshore to cross the array areas.

[10] The Burial Ground at Sutton Hoo | Suffolk | National Trust
[11] Annual Survey of Visits to Visitor Attractions: Latest results | VisitBritain

Table 32.17 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
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

131. 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.

132. As part of the Navigational Risk Assessment (NRA) process, NFOW conducted two vessel traffic surveys within ten nautical miles of the array areas and two nautical miles of the offshore cable corridor and interconnector cable corridor. The surveys covered a period of at least 28 days[12] as required by the Maritime and Coastguard Agency (MCA) under MGN 654 guidance and were conducted once in the winter months (January – March) and once in the summer months (June – July) of 2022.

133. Over the combined 56-day survey period, an average of five unique recreational vessels was recorded per day within the NRA study area. There was a total of 12 intersections through the northern array area by recreational vessels during

[12] A total of 56 days (28 days during each survey) was collected in practice, above the required 28 days. See Chapter 5 Shipping and Navigation (Volume I) for further details.

the 56-day period, and 69 intersections through the southern array area. Recreational activity was observed to be higher in the summer compared to the winter, which coincides with more favourable weather conditions. An average of 11 recreational vessels was recorded per day during the summer survey, while the average for the winter survey was less than one vessel per day.

134. Over the combined 56-day survey period, an average of four unique passenger vessels was recorded per day within the NRA study area. There was a total of two intersections through the northern array area by passenger vessels during the 56-day period, and none through the southern array area. The majority of passenger vessel traffic recorded was identified as roll-on / roll-off passenger vessels operated by Stena Lines transiting between Harwich and Hook of Holland in the Netherlands. The remainder of passenger vessel traffic was identified as cruises. Similar to recreational vessels, passenger vessel traffic was higher in the summer than the winter. An average of five passenger vessels was recorded per day during the summer survey, while the average for the winter survey was three vessels per day.

135. Further details about sailing, yachting, ferry lines, and other recreational crafts are discussed in Chapter 15 Shipping and Navigation (Volume I).

32.5.4.2.3 Recreational fishing

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

137. 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 search area and 60km from the array areas. 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 32.17. Further details about fishing vessel traffic can be found in Chapter 15 Shipping and Navigation (Volume I).

32.5.4.2.4 Other marine recreational activities

138. There are some water sports hire facilities and training schools in proximity to the landfall search area, 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 32.17 such as Gunfleet Boating Club also offer kayaking and jet skiing.

32.5.4.3 Coastal tourism and recreation assets

139. This section describes coastal assets along the Essex and East Suffolk coastline. Notable coastal tourism and recreation receptors in relation to the landfall search area are shown in Figure 32.3 (Volume II).

32.5.4.3.1 Landfall search area

140. The landfall search area is located between Clacton-on-Sea and Frinton-on-Sea. 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.

141. Frinton Beach is a quiet family beach destination noted for its cleanliness and gentility. 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.

142. Holland Haven is a country park and Local Nature Reserve (LNR) located in the southwest of the landfall search area. 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.

143. Next to Holland Haven Country Park in the north-east of the landfall search area 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.

144. There are two marine bathing water designations in proximity to the landfall search area, as shown in Figure 32.3 (Volume II). 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, with excellent and good water quality respectively. Holland bathing water is located within the landfall area and was classified as having excellent water quality. Frinton bathing water is located immediately adjacent to the landfall area to the northeast and was classified as having good water quality.

145. The Rock Hotel is located approximately 200m 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 areas

146. As described in the baseline of Chapter 29 Seascape, Landscape, and Visual Impact Assessment (SLVIA) (Volume I), the Zone of Theoretical Visibility (ZTV) around the array areas covers a large area of open water and sections of the Essex and Suffolk coast. The ZTV is shown in the Chapter 29 Figures (Volume II, Figures 29.1.2a to 29.1.3b). 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 (over 40 km from the array areas) to Clacton-on-Sea in Tendring District and Margate in Kent (40 km from the closest North Falls turbine). As discussed in Section 32.3.1, the tourism study area is based on those areas where significant seascape and visual impacts were identified in Chapter 29 SLVIA (Volume I).

147. 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

148. 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.

149. Approximately 3km southwest of the landfall search area 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.

150. 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 Seaqauarium and the Seafront Gardens. Adjacent to West Beach is Martello Bay, named after the Martello towers which are small Napoleonic forts built during the 19th 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.

151. 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.

152. 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), Special Area of Conservation (SAC), Ramsar wetland and SSSI.

153. 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.

154. 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 Suffolk coast

155. Notable areas from which North Falls may be visible on a clear day from the Suffolk County coast include the Suffolk Coast and Heaths AONB, Orford Ness, Aldeburgh, Southwold, and the Oulton Broad. The England Coast Path, once completed, will also run along this stretch of the English coastline.

156. Directly opposite Harwich (discussed above) is the port town of Felixstowe with traditional seaside offerings such as Felixstowe Pier, the Seafront Gardens and Landguard Fort.

157. Approximately 13km north of the landfall search area and 22.5km from the array areas (at the closest point) is the Suffolk Coast and Heaths AONB which runs from Harwich to Kessingland. The AONB is a nationally important landscape designated in 1970 to conserve and enhance the habitats and biodiversity and habitats of the area. The AONB is home to several scenic coastal and countryside trails such as the Suffolk Coast Path, the Sandlings Walk, and the Stour and Orwell Walk.

158. There are also a number of natural tourist attractions along the East Suffolk coast such as Deben Estuary, Orford Ness National Nature Reserve, Royal Society for the Protection of Birds (RSPB) Minsmere nature reserve, and Dunwich Heath and Beach. In addition, the area is also well known for historic seaside towns and villages including Aldeburgh, Southwold, Thorpeness, and Bawdsey, as shown in Figure 32.3 (Volume II).

32.5.4.3.5 Suffolk and Essex coastal assets beyond the North Falls ZTV

159. 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.

160. On the south west of the Tendring Peninsula, 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.

161. Directly opposite of Brightlingsea 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 England Coast Path

162. 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 England Coast Path. In addition to providing for the establishment of the long-distance trail, the Act also grants the public the right to access and roam the coastal margin, or the land between the trail and the sea.

163. Works on the England Coast Path are still underway. Within the Tendring District there is a 60km stretch from Jaywick to Harwich that is currently approved in whole and under development. The original completion date for the entire England Coast Path was planned for the end of 2021, but progress has been delayed due to the coronavirus pandemic and a European court judgment in 2018 regarding environmentally protected sites. The new completion date is unknown, but the government has announced its commitment to make the England Coast Path fully walkable by the end of the current parliament in 2024. The Jaywick to Harwich stretch of the trail will interact with the Project at the landfall search area between Holland-on-Sea and Frinton-on-Sea. The status of this section of the Coast Path will be reviewed and updated for the ES where relevant.

164. 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.

165. In addition to the Jaywick to Harwich section of the England Coast Path, the landfall search area 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.

166. The landfall search area interacts with the following PRoW and cycle routes (Figure 32.4, (Volume II):

- Frinton and Walton (BR2) bridleway;
- Frinton and Walton (FP3) footpath;
- Frinton and Walton (FP5) 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

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

32.5.4.4.1 Watercourses

168. The Holland Brook (main river) and its tributaries, including Tendring Brook and Kirby Brook, are crossed by the onshore cable corridor(s) and the landfall search area. 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. Frinton golf course is also within the SSSI boundary.

169. At the northern limit of the onshore project area, near the onshore substation zone, 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.

170. The onshore cable corridor(s) 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

171. Under the Countryside Rights of Way (CRoW) Act 2000, 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.

172. There is a small parcel of open access land within 500m of the onshore cable corridor(s) at Thorpe Green, near the junction of B1035 and B1033. However, this parcel of land is outside the onshore project area (as shown in Figure 32.5, Volume II) and therefore will not be affected by the Project.

32.5.4.4.3 Quiet lanes

173. 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.

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

32.5.4.4.4 Long distance trails

175. Inland, the onshore cable corridor(s) interact with 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 Onshore PRoW

176. The onshore project area interacts with PRoW in the following ways:

- Two interactions with bridleways;
- 29 interactions with footpaths; and
- One interaction with an NCN route.

177. These are listed below in Table 32.18 and shown in Figure 32.4 (Volume II).

Table 32.18 Onshore PRoW and cycle routes

Route name or ID	Location	Interaction
Bridleways		
Thorpe-Le-Soken BR5	Thorpe-Le-Soken	Intersects onshore project area, crosses onshore cable corridor(s)
Frinton and Walton BR2	Frinton and Walton	Intersects onshore project area, crosses onshore cable corridor(s)
Footpaths		
Great Bromley FP5	Great Bromley	Intersects onshore project area, crosses onshore substation zone
Little Bromley FP15	Little Bromley	Intersects onshore project area, crosses onshore substation zone
Little Bromley FP16	Little Bromley	Intersects onshore project area, crosses onshore cable corridor(s)
Little Bromley FP17	Little Bromley	Intersects onshore project area, crosses onshore cable corridor(s)
Little Bromley FP21	Little Bromley	Intersects onshore project area, crosses onshore cable corridor(s)
Wix FP15	Wix	Intersects onshore project area, crosses onshore cable corridor(s)
Wix FP32	Wix	Intersects onshore project area, crosses onshore cable corridor(s)
Wix FP31	Wix	Intersects onshore project area, crosses onshore cable corridor(s)
Wix FP37	Wix	Intersects onshore project area, crosses onshore cable corridor(s)
Tendring FP1	Tendring	Intersects onshore project area, crosses onshore cable corridor(s)
Tendring FP3	Tendring	Intersects onshore project area, crosses onshore cable corridor(s)

Route name or ID	Location	Interaction
Tendring FP8	Tendring	Intersects onshore project area, crosses onshore cable corridor(s)
Tendring FP22	Tendring	Intersects onshore project area, crosses onshore cable corridor(s)
Beaumont-Cum-Moze FP18	Beaumont-Cum-Moze	Intersects onshore project area, crosses onshore cable corridor(s)
Thorpe-Le-Soken FP18	Thorpe-Le-Soken	Intersects onshore project area, crosses onshore cable corridor(s)
Beaumont-Cum-Moze FP14	Beaumont-Cum-Moze	Intersects onshore project area, crosses onshore cable corridor(s)
Thorpe-le-Soken FP1	Thorpe-Le-Soken	Intersects onshore project area, crosses onshore cable corridor(s)
Beaumont-Cum-Moze FP15	Beaumont-Cum-Moze	Intersects onshore project area, crosses onshore cable corridor(s)
Thorpe-Le-Soken FP3	Thorpe-Le-Soken	Intersects onshore project area, crosses onshore cable corridor(s)
Thorpe-Le-Soken FP4	Thorpe-Le-Soken	Intersects onshore project area, crosses onshore cable corridor(s)
Thorpe-Le-Soken FP7	Thorpe-Le-Soken	Intersects onshore project area, crosses onshore cable corridor(s)
Thorpe-Le-Soken FP13	Thorpe-Le-Soken	Intersects onshore project area, crosses onshore cable corridor(s)
Frinton and Walton FP11	Frinton and Walton	Intersects onshore project area, crosses onshore cable corridor(s)
Frinton and Walton FP38	Frinton and Walton	Intersects onshore project area, crosses onshore cable corridor(s)
Frinton and Walton FP10	Frinton and Walton	Intersects onshore project area, crosses onshore cable corridor(s)
Frinton and Walton FP7	Frinton and Walton	Intersects onshore project area, crosses onshore cable corridor(s)
Frinton and Walton FP6	Frinton and Walton	Intersects onshore project area, crosses onshore cable corridor(s)
Frinton and Walton FP5	Frinton and Walton	Intersects onshore project area, crosses onshore cable corridor(s)
Frinton and Walton FP3	Frinton and Walton	Intersects onshore project area, crosses onshore cable corridor(s)
Cycle routes		
NCN Route 51	Harwich to Colchester	Intersects onshore project area, crosses onshore cable corridor(s)

32.5.4.4.6 Other recreational and tourism assets

178. There are a number of other recreational businesses that are operational within 500m of the onshore project area including:

- Frinton Golf Club, intersects the onshore project area;
- Frinton Sea Lawn Tennis Club, approximately 250m from onshore project area;
- CL Cheerleading Academy, approximately 10m from onshore project area; and
- Links Combat Academy, approximately 150m from onshore project area.

179. Essex Wildlife Trust's Great Holland Pits Nature Reserve is located adjacent to 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 is Great Holland Mill - The Granary, a holiday apartment rental.

180. A number of other small holiday accommodations are located within 500 m of the onshore project area including Park View Bed and Breakfast, Elm Farm County Park and Periwinkle Cottage.

32.5.5 Accommodation in Essex and Suffolk

181. A review of the Accommodation Stock Audit compiled by Visit Britain in 2016 shows that there is a total of 587 serviced and non-serviced establishments in the county of Essex and 1,285 establishments in the county of Suffolk. This equates to 12,226 rooms and 55,368 bedspaces across Essex. In comparison, Suffolk had 8,322 rooms and 20,620 bedspaces. A breakdown by district is provided in Table 32.19 and Table 32.20. The significantly higher number of bedspaces to rooms/establishments in Essex can be explained by the significantly higher number of tourist campsite bedspaces which cover a large number of bedspaces per room/establishments (which is highly concentrated in Colchester).

Table 32.19 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
Essex	12226	10345	1881	187	1665	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

County / District name	Total	Serviced	Non-serviced			
		Hotel and similar establishment	Total non-serviced	Holiday dwelling	Tourist campsite	Others
Chelmsford	769	765	4	4	0	0
Uttlesford	2064	2035	29	28	0	1
Braintree	774	747	27	27	0	0
Colchester	1698	1200	498	20	466	12
Tendring	1573	929	644	33	608	3
Thurrock	604	604	0	0	0	0
Southend on Sea	885	879	6	6	0	0
Suffolk	8322	5470	2852	1470	1363	19
Babergh	1013	838	175	86	84	5
East Suffolk	4115	1892	2223	1234	988	1
Ipswich	850	847	3	3	0	0
Mid Suffolk	640	464	176	94	69	13
West Suffolk	1704	1429	275	53	222	0

Table 32.20 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
Essex	55368	24315	31053	784	30208	61
Harlow	1300	1254	46	4	0	42
Epping Forest	1952	1830	122	102	20	0
Brentwood	1037	830	207	0	207	0
Basildon	1950	1944	6	6	0	0
Castle Point	139	135	4	4	0	0
Rochford	630	510	120	0	120	0
Maldon	2191	1034	1157	185	972	0
Chelmsford	1816	1796	20	20	0	0
Uttlesford	4717	4606	111	110	0	1
Braintree	1851	1769	82	82	0	0
Colchester	29192	2595	26597	87	26498	12

County / District name	Total	Serviced	Non-serviced			
		Hotel and similar establishment	Total non-serviced	Holiday dwelling	Tourist campsite	Others
Tendring	4870	2306	2564	167	2391	6
Thurrock	1613	1613	0	0	0	0
Southend on Sea	2112	2095	17	17	0	0
Suffolk	20620	12233	8387	5302	2989	96
Babergh	2336	1871	465	360	85	20
East Suffolk	11004	4167	6837	4262	2512	63
Ipswich	1905	1884	21	21	0	0
Mid Suffolk	1802	1201	601	450	138	13
West Suffolk	3573	3110	463	209	254	0

182. 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.

183. There are 36 holiday parks and 12 licensed residential parks in the Tendring District, which possess 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).

184. Based on a sample of holiday parks in Tendring, annual occupancy rates peaked in the high season during the summer months (June to August where August peaked at 73%[13]), followed by medium occupancy rates (56% in mid-season September) during the spring and autumn months. Low season occupancy rates are observed during the winter months (December to February with December hitting a low of 9%). It is estimated that in 2019, the holiday park sector contributed a total of £193 million in tourism expenditures to the Tendring economy and supported a total of 3,571 Full-Time Equivalent (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

[13] Holiday and Residential Impact Assessment 2019/20 (tendringdc.gov.uk)

in holiday parks as tourism assets. Other notable conclusions from the Holiday and Residential Park Impact Assessment 2019/20 published by the Tendring District Council (2020) 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, with the highest occupancy rate observed in August at 73%; 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.

185. Roughly half of the holiday accommodation in Suffolk is located in the East Suffolk District, which borders Tendring District in which the onshore project area is located. Ipswich is the largest urban area within Suffolk and is located within a 45 minute drive time of the onshore project area but has significantly less accommodation available than East Suffolk (Table 32.19 and Table 32.20).

32.5.6 Perceptions of offshore wind farms

186. This section of the baseline provides a literature review examining the relationship between OWFs and their associated infrastructure and the local tourism sector, as explained by tourist perceptions.

187. 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.
- The ex-post part of the research base is limited in its coverage. Ex-post studies explore and provide evidence of the actual effects of specific wind farm developments. Relevant studies in this group are focused on assessing the observed changes in visitor behaviour after a wind farm has been built and is operational. These studies explore observed effects as reported by visitors, sector bodies, tourism and other businesses.
- 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.

188. It is important to note that this research topic has a limited body of ex-post evidence, 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

189. 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 would not affect their decision to return or go to the area in the future. This is also supported by a 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, also corroborated past observations, with 80% of national respondents and 83% of coastal respondents to the Scottish survey 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.

190. 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.

191. 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 tracker survey of public opinion of energy related topics undertaken by the then UK government department of Business, Energy and Industrial Strategy (BEIS, 2012-2021) provides robust evidence of the general public's attitudes to renewable energy in general and OWF development specifically. The percentage of the adult population sampled that are opposed to renewable energy has fallen from 5% in 2012 to 2% in 2021 (based on 2121 and 4,229 respondents respectively), whilst the percentage aged over 65 which oppose renewables has fallen from 10% to 1% over the same period. In terms of opposition to OWFs, the overall percentage that are

opposed has fallen from 7% in 2012 to 4% in 2021, whilst the percentage aged over 65 that are opposed has fallen from 14% to 5%. The same series of opinion polls reveal that 80% of over-65s are now concerned about climate change, up from 56% in 2012.

192. 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 limitation to the data 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.

193. 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.

194. 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); an ex-post study conducted in Ireland also found that the visibility of large infrastructure projects had negligible effects on people's enjoyment of the landscape (Failte Ireland, 2021). However, the majority of people still 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

195. 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.

196. 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 perception

197. In summary, the literature review found that the majority of perception 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 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.

198. 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 effects on the local tourism economies of Essex and East Suffolk can be seen in the tourism statistics reported in Table 32.12 and Table 32.14 between 2017 and 2019..

32.5.7 Anticipated trends in baseline conditions

199. 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, and few assets in the onshore study area (as defined in Section 32.3.1. The main assets are designated sites of ecological importance; seaside towns and maritime villages; beaches; and marine recreational activities. This has led to the development of a confident tourism economy where businesses supplying tourism services rely upon the attractiveness of coastal areas to maintain tourism demand. Considering the emphasis that local tourism organisations such as Visit Essex have placed on the coastal character of the area, it is likely that tourism businesses will continue to rely upon coastal and marine assets for their tourism demand.

200. 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. However high and low seasons are likely to remain driven by school holidays and bank holidays.

201. It is also important to note that the UK tourism sector has benefited slightly from the 'staycation' boom in its recovery from the coronavirus pandemic, and this trend is forecasted to continue into 2022 (Parkdean Resorts, 2021). However, it is unclear whether this phenomenon will persist in the next couple of years when travel and pandemic restrictions are lifted globally, and travel anxiety has fully subsided. It should be noted that the economic outlook for the UK will be an important factor in the demand for staycations over the coming years. Current economic forecasts including from the Office of Budget Responsibility and the Bank of England anticipate periods of sustained low/no economic growth over the coming years. In this context the public may be more likely to seek lower cost domestic holiday options due to lower consumer confidence and decreased disposable income levels.

32.6 Assessment of significance

32.6.1 Potential effects during construction

32.6.1.1 Impact 1 Visual impacts on marine and coastal tourism and recreational assets due to offshore works

193. The visual effects from partially constructed Wind Turbine Generators (WTG) and Offshore Substation Platform (OSP) are assumed to be no greater than the operational effects when the offshore infrastructure is fully constructed. Therefore, the visual effects during construction of the offshore infrastructure are not assessed separately and instead are covered under operational effects in Section 32.6.2.1.

194. The construction impact assessment focuses on the temporary effect of construction vessels on tourists and recreational users of the coast.

32.6.1.1.1 Sensitivity of receptors

195. Receptors that may be affected by visual impacts on the coast include visitors and tourists:

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

196. Due to their mobility, visitors engaging in marine tourism and marine recreational activities are likely to be able re-route away from construction activities without significantly losing their amenity value and are therefore deemed to be of low sensitivity to visual impacts of offshore works.

197. 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.

198. Coastal tourist destinations within and close to the landfall search area are of medium value, taking into account the contribution that coastal tourism in the Tendring District makes to the visitor economy at the county level. The England Coast Path and NCN Route 150 have national status and are thus considered to be high value receptors. This value does not increase the sensitivity and in reality, is likely to add to the motivation for visitors and tourists to continue to use the area.

32.6.1.1.2 Magnitude of impact

199. Visual impacts from construction vessels will be short term, transient, and reversible.

200. During shipping surveys (see Chapter 15 Shipping and Navigation (Volume I)), the average recorded number of vessels per day in the summer was 167.

201. The maximum number of vessels in the offshore project area at any one time would be 35, with the majority in the array areas, 22.5km from the coast (at the closest point). This level of increased vessel activity is unlikely to cause a change in visitor and tourist behaviour as a result of the visual impact and thus the magnitude of impact is considered to be negligible.

32.6.1.1.3 Significance of effect

202. Given the low sensitivity and negligible magnitude, the resultant effect of construction visual impacts on visitors engaging in marine tourism and recreational activities and those visiting coastal tourist destinations is negligible and thus not significant in EIA terms.

32.6.1.2 Impact 2 Disruptions to marine tourism and recreational activities

203. Construction activities in the offshore project area could present physical obstructions and displacement of visitors engaging in marine tourism and recreational activities.

204. 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.

32.6.1.2.1 Sensitivity of receptors

205. As discussed in Section 32.5.4.2, relevant marine tourist and recreation receptors include:

- Sailing, yachting, and other recreational crafts;
- Recreational fishing; and
- Water sports (e.g. paddleboarding, kitesurfing, windsurfing, and wingfoiling).

206. 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 Chapter 15 Shipping and Navigation (Volume I)). 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 Chapter 31 Socio-economics (Volume I).

207. As discussed in Section 32.5.4.2, SCUBA diving receptors are unlikely to be present in the study area.

208. Due to their mobility, visitors engaging in marine tourism and recreational activities are likely to be able re-route away from construction activities without significantly losing their amenity value and are therefore deemed to be of low sensitivity to disturbance impacts of offshore works.

32.6.1.2.2 Magnitude of impact

209. Physical disruptions that may occur during the construction phase will be temporary and localised around the areas of activity. As part of embedded mitigation, NFOW has committed to apply for offshore safety zones of up to 500m around potential obstacles during the construction phase such as partially installed structures or cables and extinguished navigation lights. 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 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. Any impacts on shipping and navigation safety will be mitigated to tolerable levels to ensure effects are as low as reasonably practicable (see Chapter 15 Shipping and Navigation (Volume I)).

210. Overall, there will be up to 1,030 vessel movements per year during the construction phase, and the total number of vessels operating on-site simultaneously at the peak of offshore construction activity will be 35. The majority of these vessels will be in the array areas, 22.5km from the coast (at the closest point), whereas Chapter 15 Shipping and Navigation (Volume I) shows the majority of recreational marine users are in the nearshore.

211. It is therefore expected that the overall magnitude of impact on marine tourism and recreational assets will be low.

32.6.1.2.3 Significance of effect

212. Given the low sensitivity and low magnitude, the resultant effect of construction disruptions to visitors engaging in marine tourism and recreational activities is negligible and not significant in EIA terms.

32.6.1.3 Impact 3 Disruptions to coastal tourism and recreational assets

213. Construction activities at landfall include onshore construction vehicle movements, HDD operation around the temporary landfall compound, the installation of transition joint bays, and cable installation and jointing works between the onshore and offshore export cables.

214. 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.

215. Due to NFOW's commitment to the use of HDD at landfall, there is no requirement for prolonged beach closure throughout the construction phase, with restrictions limited to emergency access only.

32.6.1.3.1 Sensitivity of receptors

216. As discussed in Section 32.5.4.3.1, receptors in the landfall search area include visitors and tourists to the following coastal destinations:
    - Coastal PRoW and other non-motorised routes;
    - Frinton Golf Club;
    - Beach huts;
    - Frinton beach;
    - Holland Haven Country Park;
    - Greensward Park; and
    - The Rock Hotel; and
    - Designated bathing waters.

217. The sensitivity of visitors and tourists is subject to the level of motivation to continue using the area and the perception of individuals in relation to the construction impacts. As discussed in Section 32.5.6, perception can be highly variable.

218. In the context of tourism in Essex, the above receptors represent a very small proportion of the available assets.

219. For users of the coastal PRoW and other non-motorised routes, their exposure to the landfall works is likely to be transient as they progress along their route and therefore sensitivity is deemed to be low. As discussed in Section 32.6.1.1, the 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.

220. Users of Frinton Golf Club are unlikely to be deterred by disruption and are therefore also deemed to be of low sensitivity.

221. For the users of the beach huts at Frinton, individuals will have limited ability to adapt as they will be committed to a certain hut, however they are expected to recover immediately on completion of the works. Therefore, for this receptor group the sensitivity is also deemed to be low.

222. 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.

223. The Rock Hotel as an individual business has limited ability to adapt, however the hotel is expected to recover in the short-term following completion of the works (should any disruption occur) and is therefore of low sensitivity.

224. The two designations close to the landfall area are Holland bathing water and Frinton bathing water, with excellent and good water quality respectively. 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 study area with good or excellent water quality, tourists and visitors using bathing waters are likely to be able to adapt and therefore the sensitivity is low.

32.6.1.3.2 Magnitude of impact

32.6.1.3.3 Temporary closure or diversion of PRoW and other non-motorised routes

225. Coastal PRoWs and other non-motorised routes, such as heritage trails and the England Coast Path passing through the landfall search area and the potential interaction with the landfall construction works are outlined in Table 32.21.

226. Site selection of the landfall area will be refined following PEIR and will consider the consultation feedback received. An OPRoWMP will be developed in consultation with relevant stakeholders and will be submitted alongside the DCO application. It is expected where disruption to existing routes cannot be avoided, temporary diversions will be implemented. Tourists and visitors using these routes are therefore likely to be able to adapt and are therefore of a low impact magnitude is predicted.

Table 32.21 Coastal PRoW, heritage trails and cycle routes within the landfall search area

Route name or ID	Interaction	Proposed action
Bridleways		
Frinton and Walton BR2	Intersects onshore project area, crosses within landfall search area	Subject to final landfall site selection. To be assessed further in the ES.
Footpaths		
Frinton and Walton FP3	Intersects onshore project area, crosses within landfall search area	Subject to final landfall site selection. To be assessed further in the ES.
Frinton and Walton FP41	Intersects onshore project area, crosses within landfall search area	Due to NFOW's commitment to use HDD 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.

Route name or ID	Interaction	Proposed action
Frinton and Walton FP5	Intersects onshore project area, crosses within landfall	Subject to final landfall site selection. To be assessed further in the ES.
Great Clacton FP29	Intersects onshore project area, crosses within landfall search area	Due to NFOW's commitment to use HDD 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.
Proposed England Coast path	Intersects onshore project area, crosses within landfall search area	Due to NFOW's commitment to use HDD as the construction methodology at landfall, the English Coast path would not be directly affected.
Heritage trails		
Frinton and Holland-on-Sea World War Two Trail	Intersects onshore project area, crosses within landfall search area	Due to NFOW's commitment to use HDD as the construction methodology at landfall, the Frinton and Holland-on-Sea World War Two Trail would not be directly affected.
Clacton Heritage Trail	Intersects onshore project area, crosses within landfall search area	Due to NFOW's commitment to use HDD as the construction methodology at landfall, the Clacton Heritage Trail would not be directly affected.
Cycle routes		
NCN Route 150	Intersects onshore project area, crosses within landfall search area	Trenchless crossing, no action

32.6.1.3.4 Visual effects of onshore works

227. The visual effects that will occur during the construction phase will be short term and reversible, given that land and landscape elements would be reinstated at the end of the construction phase.

228. For coastal receptors, the spatial extent of the effect will be localised around the landfall compound (described further in Chapter 5 Project Description (Volume I), Section 5.7.2).

229. Furthermore, visibility will not be uniform throughout the entire extent of each of the receptor areas, given that views of the surrounding landscape change depending on the topography and the presence of structures such as buildings.

230. The magnitude of impact on coastal tourism and recreational assets as a result of visual effects is therefore considered to be low.

32.6.1.3.5 Air quality

231. Construction air quality effects are described in Section 20.6 of Chapter 20 Onshore Air Quality (Volume I). With the implementation of mitigation measures recommended by the Institute of Air Quality Management (IAQM) and other best practice measures, which will be incorporated into the Outline Code of Construction Practice (OCoCP), the residual effect associated with construction

dust and fine particulate matter is predicted to be not significant for human receptors within and near the onshore project area. The residual effects of non-road mobile machinery emissions at landfall and construction-generated road traffic are also predicted to be not significant.

232. The magnitude of impact on coastal tourism and recreational assets as a result of air pollution is therefore considered to be negligible.

32.6.1.3.6 Noise and vibration

233. Noise from onshore works at the landfall will comprise site preparation, excavation of transition bays and the HDD works. The site preparation and excavation works will be undertaken during the standard working hours for the Project (07:00 to 19:00 hours, Monday to Saturday (noted that staff may arrive on site earlier/leave site after these working times), with no activities on Sundays or bank holidays). Outside of these hours, construction work may be required for essential activities including but not limited to:

- Continuous periods of operation, such as concrete pouring, drilling, and pulling cables through ducts; and
- Delivery of abnormal indivisible loads that may otherwise cause congestions on the local road network.

234. Noise and vibration effects are discussed in detail in Section 26.6 of Chapter 26 Noise and Vibration (Volume I). With appropriate mitigation measures in place, the residual effect of noise from landfall construction is considered to be negligible in the daytime, evenings, and weekends and minor adverse at night. No vibration impacts are anticipated due to landfall construction.

235. The magnitude of impact on coastal tourism and recreational assets as a result of noise is therefore considered to be negligible for the majority of assets which are used during daylight hours.

236. For the Rock Hotel, which is located approximately 200m from the landfall search area, the impact may be of low magnitude during periods of 24 hour drilling, with appropriate mitigation measures in place. It should be noted that the final landfall compound area will be refined following PEIR, taking into consideration consultation feedback and therefore this will be reassessed for the ES.

32.6.1.3.7 Marine water quality

237. As assessed in Chapter 9 Marine Water and Sediment Quality (Volume I) describes the effect of the landfall works on the designated bathing water.

238. 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.

239. Chapter 9 Marine Water and Sediment Quality (Volume I) concludes that the effect of increases in suspended sediments associated with the installation of the export cable in coastal waters near the HDD exit point is of minor adverse significance to the designated bathing water.

240. 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. The deterioration in water quality associated with the release of sediment bound contaminants is therefore predicted to be of negligible significance to the bathing water.

241. This level of change to water quality is unlikely to deter visitors and tourists and therefore the impact magnitude on tourism and recreation as a result of changes to water quality is negligible.

32.6.1.3.8 Summary of disturbance magnitude

242. In taking account of the embedded mitigation measures, the overall magnitude of impact on coastal tourism and recreational assets is predicted to be low. Any impacts arising from the pathways outlined above are anticipated to be temporary, localised, and reversible.

243. As part of embedded mitigation, an OCoCP and an OPRoWMP would be developed in consultation with relevant stakeholders and submitted alongside the DCO application. Best practice measures covering construction air quality management (e.g. fuel conservation measures and fitting diesel particulate filters on all non-road mobile machinery), noise and vibration management (e.g. temporary screening around the construction compound), pollution prevention and control (e.g. measures to control the accidental release of drilling fluids), and PRoW crossings would be incorporated into these documents and secured as part of the consenting process. Furthermore, due to the usage of HDD at landfall, there is no requirement for prolonged beach closure, with restrictions limited to emergency access only. Therefore, visitors to the beach, coastal PRoW, and other coastal assets within the landfall area would not be physically disrupted during the duration of landfall construction activities. Relevant mitigation measures are detailed in their respective chapters, namely Chapter 20 Onshore Air Quality, Chapter 26 Noise and Vibration, and Chapter 9 Marine Water and Sediment Quality (Volume I).

32.6.1.3.9 Significance of effect

244. Due to the low impact magnitude and negligible to low sensitivity of most receptors, the overall effect significance on coastal tourism and recreational is negligible and not significant in EIA terms.

32.6.1.4 Impact 4 Disruptions to onshore tourism and recreational assets

245. Similar to landfall, construction activities along the final onshore cable route and within the onshore substation zone could expose tourists and local residents engaging in recreational activities 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

246. Construction activities include onshore construction vehicle movements, the installation of cable ducts using both trenchless and open cut trenching methods, haul road construction, the installation of jointing bays and link boxes, cable pulling and jointing operation, and the construction of the onshore substation.

247. A rolling construction programme would be implemented for construction activities along the final onshore cable route. Works will generally progress in sections along the route, so that individual sections will be affected for a minimum amount of time, rather than the full onshore construction period, and the construction footprint is minimised.

248. Temporary construction compounds, including the cable construction, onshore substation construction and trenchless crossing compounds, and haul roads, will be removed and reinstated following the completion of onshore construction works.

249. The duration of impacts will be highest around the onshore substation where construction will be continuous and around construction compounds and haul roads, which would be required for the entire duration of the onshore construction period.

32.6.1.4.1 Sensitivity of receptors

250. Receptors that may be affected by disruptions due to construction activities associated with the onshore substation and final onshore cable route include:

- Visitors using onshore PRoW and other non-motorised routes;
- Visitors to nature reserves;
- Recreational users of sports and social assets in the study area; and
- Accommodation providers.

251. These receptors are likely to be able to adapt and/or recover in the short-term following completion of the works and are therefore of low sensitivity.

32.6.1.4.2 Magnitude of impact

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

252. The onshore project area interacts with PRoW 32 times (Table 32.18), the majority of which are footpaths. With respect to PRoW crossings, where a PRoW is crossed by the onshore project area, NFOW would keep the PRoW open where practicable to minimise impacts to recreational users. Where this is not practicable, a suitable diversion would 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) would be proposed.

253. 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.

254. Of the 32 PRoW:

- One bridleway and five footpaths are proposed to be crossed using trenchless techniques, which would result in no direct impacts to these routes;
- One bridleway and 24 footpaths have the possibility of a temporary closure or diversion due to the use of open cut trenching. These figures are based on a worst case scenario, which accounts for all onshore cable corridor(s). Once a final onshore cable route has been selected, the number of PRoW crossed by the onshore project area is expected to decrease; and
- Little Bromley Footpath 15 overlaps the onshore substation zone. Impacts on this path would be subject to the final substation site selection which will be undertaken post-PEIR. Should the PRoW route through locations of permanent infrastructure, an acceptable diversion would be provided, and the existing route would be closed.

255. 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 interacts with the trail several times, totalling to seven interactions. As mentioned above, this figure is based on a worst case scenario, and following design refinements to the onshore cable corridor(s), the number of interactions is expected to decrease.

256. Due to the rolling construction programme limiting the spatial and temporal extent of impacts on PRoW, the impact magnitude is low.

257. The best practice measures described above would be included in the OPRoWMP which will be submitted with the DCO application.

32.6.1.4.4 Visual effects

258. The majority of visual effects 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 which is assessed in Section 32.6.2.1).

259. The spatial extent of the effect will be localised to the final onshore cable route, onshore substation zone, and any temporary construction compounds and haul roads. Furthermore, visibility from a PRoW 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.

260. This level of visual effect is unlikely to alter behaviour and so the magnitude of impact on onshore tourism and recreational assets is considered to be negligible.

32.6.1.4.5 Air quality

261. Construction air quality effects are described in Section 20.6 of Chapter 20 Onshore Air Quality (Volume I). With the implementation of mitigation measures recommended by the IAQM and other best practice measures, which will be incorporated into the OCoCP, the residual effect is predicted to be not significant for human receptors.

262. The magnitude of impact on onshore tourism and recreational assets as a result of air pollution is therefore considered to be negligible.

32.6.1.4.6 Noise and vibration

263. Noise and vibration effects are discussed in detail in Section 26.6 of Chapter 26 Noise and Vibration (Volume I). With appropriate mitigation measures in place, the residual effect of noise from onshore cable construction is considered to range from negligible to minor adverse, while the effect of noise from onshore substation construction is considered to be negligible in the daytime and evenings and minor adverse at night.

264. 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.

265. 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.

32.6.1.4.7 Summary of disturbance magnitude

266. The combined effect of the disturbance pathways described above could result in short term changes in behaviour on a small spatial scale. The impact magnitude is therefore deemed to be low.

32.6.1.4.8 Significance of effect

267. Due to the low impact magnitude and low sensitivity of the receptors, the overall effect significance on onshore tourism and recreational is negligible and not significant in EIA terms.

32.6.1.5 Impact 5 Reductions in tourist accommodation availability due to a non-resident workforce

268. The analysis of socio-economic impacts related to construction employment in Chapter 31 Socio-economics (Volume I) 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 480 workers under worst case assumptions. This comprises 354 workers for landfall and onshore cable route works and a further 126 for onshore substation works.

269. As part of embedded mitigation, NFOW has committed to working with local partners to maximise the employment of local workers during the Project's construction and operation phase, further detail on the Outline Skills and Employment Plan is outlined in Chapter 31 Socio-economics, which will be produced for the DCO submission.

270. As discussed 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).

271. An additional 50-420 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.

272. 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 32.20) is within range of the onshore project area.

273. Lastly, it is assumed that the non-resident workforce will be staying at serviced accommodation only, which is defined as hotels and similar establishments. Under a worst case assumption, each construction personnel are also expected to be accommodated separately, occupying one room and one bedspace each.

274. 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 would be undertaken, and if required an accommodation plan could be co-developed and implemented to reduce displacement if considered favourable.

32.6.1.5.1 Sensitivity of receptors

275. As shown in Table 32.19 and Table 32.20, 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 32.22.

276. 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. Based upon criteria within Table 32.7, the sensitivity is therefore deemed to be low.

Table 32.22 Breakdown of accommodation availability around the onshore project area

District / Borough	Number of rooms	Number of bedspaces
Essex County		
Colchester Borough	1,200	2,595
Tendring District	929	2,306
Maldon District	153*	310*
Braintree District	224*	531*
Suffolk County		
Ipswich Borough	850	1,884
Babergh District	838	1,871
East Suffolk District (formerly known as Suffolk Coastal prior to merging with Waveney District)	349	739
* Figures are conservative estimates, assuming 30% are within reach of the onshore project area		

32.6.1.5.2 Magnitude of impact

277. Peak construction demand for onshore workers has been determined to be a total of 480 workers under worst case assumptions. This comprises 354 workers for landfall and onshore cable route works and a further 126 for onshore substation works.

278. Peak construction demand could increase demand for bedspaces in the area by up to 4.7%, while the demand for rooms could rise up to 10.6%. Under a high season scenario where hotel occupancy rates are around 80% there would still be 909 rooms available in the area, which is sufficient to accommodate the peak construction demand with a spare capacity of 429 rooms. Based on these figures, and criteria outlined in Table 32.9, the magnitude of impact is 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.

279. Furthermore, it is important to note that these calculations do not account for non-serviced accommodation within the area, which forms a significant portion of accommodation stock within Essex and is likely to attract several tourists, given the importance of camping and caravanning to the local economy, as described in Section 32.5.4.4.6.

32.6.1.5.3 Significance of effect

280. 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.

32.6.1.6 Impact 6 Disruption due to construction road traffic

281. Chapter 27 Traffic and Transport (Volume I) follows Guidelines for the Environmental Assessment of Road Traffic (GEART). 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 Chapter 27 Traffic and Transport (Volume I).

282. 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 visitor economy. 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.

283. As part of embedded mitigation, an Outline Construction Traffic Management Plan (OCTMP) would be prepared and submitted along with the DCO application, which would detail how Heavy Goods Vehicles (HGV) and single-occupancy vehicle movements would be monitored and managed, as well as how the design of accesses and offsite highway works would be overseen. The OCTMP would also include delivery time restrictions as agreed with the Essex County Council. Moreover, an Access Strategy covering both the construction and operation phase would also be developed, which would describe how impacts of HGV traffic upon the most sensitive receptors would be reduced. The strategy would be facilitated by 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 would ensure that visitors can still access and enjoy key tourism and recreational assets.

32.6.1.6.1 Sensitivity of receptors

284. Within the traffic and transport assessment, the sensitivity of a road (link) is defined by the concentration and type of user groups, as well as the separation from traffic provided by the highway environment. For instance, links where there are high concentrations of sensitive receptors such as schools and residential dwellings and limited separation are considered to be of high sensitivity. For the purpose of this assessment, all road users are collectively considered with a single sensitivity rating. In this context, road users are defined as people who are travelling between tourism and recreational assets within the area, including trips to and from their local temporary accommodation or permanent place of residence.

285. 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.

Given that road users have some degree of tolerance and adaptability, their sensitivity is considered to be low.

32.6.1.6.2 Magnitude of impact

286. Chapter 27 Traffic and Transport 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. All residual effects concluded in Chapter 27 Traffic and Transport (Volume I) are considered to be of minor adverse or negligible significance. A summary of potential likely significant effects on traffic and transport receptors can be found in Table 27.35.

287. On the basis of this, the magnitude of impact of construction road traffic on tourism and recreation is considered to be low. The nature of the impact will vary depending on the link, but all traffic impacts are expected to be temporary and reversible. Although individual impacts are localised, multiple impacts acting on the entire regional road network could be more palpable to visitors if they use several affected links during their journey.

32.6.1.6.3 Significance of effect

288. The resultant effect of disruptions due to construction traffic on road users in the context of tourism and recreation is negligible, which is not significant in EIA terms.

32.6.2 Potential effects during operation

32.6.2.1 Impact 1 Visual impacts on marine and coastal tourism and recreational assets

289. The indicative operational lifetime of North Falls is 30 years. Once infrastructure is constructed, there is potential for the array areas to be visible along the Essex and Suffolk coastline, which could have implications on the seascape. Detailed operational visual effects on representative viewpoints and routes are discussed in Section 29.6 of Chapter 29 Seascape, Landscape, and Visual Impact Assessment (Volume I).

290. 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, due to the existing high levels of marine activity in the area and the distance of the array from shore. These visual effects are assumed to not result in an effect of greater significance that those during the construction phase and are therefore not re-assessed here.

32.6.2.1.1 Sensitivity of receptors

291. As discussed in Section 32.5.4.3.2, the following receptor groups are present within the ZTV:

- Marine activities, such as fishing, sailing, boat tours and water sports;
- Coastal destinations, such as Clacton-on-Sea, Frinton-on-Sea, local beaches, golf courses (particularly Frinton Golf Club), bathing waters and sites designated for nature conservation; and

- Coastal PRoW and other non-motorised routes.

292. Presence of WTGs and OSPs could be visible from the coast and surrounding waters, for example at the beaches, paths and golf courses and for those engaging in marine activities.

293. The sensitivity of visitors and tourists is subject to the level of motivation to continue using the area and the perception of individuals in relation to the presence of infrastructure. As discussed in Section 32.5.6, perception can be variable, however most visitors drawn to these destinations for activities such as walking, golf, swimming and sailing are unlikely to be deterred by offshore visual impacts.

294. It is also important to note, the number of the existing OWFs off the Suffolk and Essex coast (discussed further in Section 32.5.4.3.2) which form part of the baseline tourism and recreation value in the study area.

295. Therefore these receptors are deemed to be of low sensitivity to visual impacts of offshore infrastructure.

32.6.2.1.2 Magnitude of impact

296. Chapter 29 Seascape, Landscape, and Visual Impact Assessment (Volume I) predicts significant residual visual effects at six out of the 17 representative viewpoints, which are all of moderate significance. These significant effects can be found at Viewpoint 4 Sizewell Beach, Viewpoint 5 Cliffs above Thorpeness, Viewpoint 6 Aldeburgh, Viewpoint 8 Orford Ness, Viewpoint 9 Shingle Street, Viewpoint 10 Pulmahite Cliffs (Bawdsey Manor). The residual effects on the remaining ten viewpoints are minor and thus not significant in EIA terms. The residual effect on the Suffolk Coastal Path is also predicted to be significant (moderate adverse) for sections of the route along the coastal edge.

297. Although some significant visual effects are anticipated, this does not directly translate to a significant impact with respect to tourism and recreation, given that the visual amenity offered by an area is not the sole decisive factor for tourists and users of recreational assets.

298. Despite the long term duration and regional spatial extent, the change in visitor numbers and the associated economic impacts are anticipated to be limited. As a worst case scenario, the magnitude of operational visual impacts is considered to be medium.

32.6.2.1.3 Significance of effect

299. Given the low sensitivity and medium magnitude, the resultant effect of visual impacts on visitors engaging in marine tourism and recreational activities and those visiting coastal tourist destinations is minor adverse and thus not significant in EIA terms.

32.6.2.2 Impact 2 Noise and visual impacts on onshore tourism and recreational assets

300. Once fully constructed and commissioned, the main source of potential visual and noise effects is limited to the onshore substation located within the onshore substation zone. As noted in Chapter 30 Landscape and Visual Impact Assessment (Volume I), final details of components within the onshore substation zone and their associated landscape mitigation are not yet known

and will be elaborated in the ES. However, measures such as the planting and maturing of native woodland and hedgerows would assist in integrating the substation operational footprint and infrastructure into the wider landscape fabric.

301. The onshore substation will not be manned, and routine O&M activities will be scheduled periodically. Under normal operating conditions, there is no requirement for lighting at the substation, and temporary lighting would be provided during working hours for O&M activities only.

302. The onshore export cables will be completely buried underground for their entire length. Jointing bays along the route will also be buried, and the land above them will be reinstated to pre-construction ground level with the exception of link box chambers where access will be required from ground level via manholes.

303. Temporary construction compounds, including the onshore substation construction, cable construction, trenchless crossing compounds and haul roads, will be removed and reinstated to their original conditions, unless required for maintenance access during the operation phase. Detailed operational visual effects on representative viewpoint are discussed in Section 30.6 of Chapter 30 Landscape and Visual Impact Assessment (Volume I).

304. There is no requirement for regular maintenance of the onshore export cables, but O&M works may be undertaken if emergency repairs are needed. However, periodic access to link boxes along the final onshore cable route would be needed for inspection and testing.

305. This section therefore focuses on the visual effects associated with the presence of the onshore substation only.

32.6.2.2.1 Sensitivity of receptors

306. Due to the highly localised nature of the impact, the only receptor category that has the potential to be visually affected during the operation phase is visitors using onshore PRoW and non-motorised routes within the ZTV of the substation.

307. For users of the PRoW and other non-motorised routes, their ability to see and hear the substation will be at a localised scale and therefore the impact would be transient as they progress along their route which is unlikely to deter the majority of users. As a result the receptor sensitivity is deemed to be low.

32.6.2.2.2 Magnitude of impact

308. Chapter 30 Landscape and Visual Impact Assessment (Volume I) predicts significant residual visual effects at four out of the seven representative viewpoints near the substation, of which three are of moderate significance while one is of major significance. These significant effects can be found at Viewpoint 2 Bridleway at Barn Lane, Viewpoint 4 at Little Bromley Road to west, Viewpoint 5 PRoW near Lilley's Farm, and Viewpoint 3 Norman's Farm respectively.

309. Similar to visual impacts on marine and coastal assets, significant effects concluded in Chapter 30 Landscape and Visual Impact Assessment (Volume I) do not necessarily entail significant impacts on onshore tourism and recreation,

as visiting behaviours are dependent on a multitude of factors beyond visual amenity.

310. Furthermore, the numbers of people engaging in tourism and recreation within the ZTV of the substation is very low in the context of the study area.

311. Operational noise effects are discussed in detail in Section 26.6 of Chapter 26 Noise and Vibration (Volume I). An onshore substation sound rating level limit of 35dB LAr,Tr is proposed for inclusion in a DCO Requirement. Compliance with this limit will ensure that the onshore substation operational noise impacts are not significant in EIA terms.

312. Despite the permanent nature of the impact, the overall magnitude of impact is considered to be negligible, given that visual and noise impacts are highly localised around the onshore substation.

32.6.2.2.3 Significance of effect

313. The resultant effect of operational visual and noise impacts on visitors using onshore PRoW and non-motorised routes is negligible, which is not significant in EIA terms.

32.6.2.3 Impact 3 Disruptions to marine tourism and recreational activities

314. As discussed in Section 32.6.1.2.2 and Chapter 15 Shipping and Navigation (Volume I) the majority of recreational marine users are in the nearshore. Sources of nearshore disruption could include:

- Export cable repairs or reburial;
- Transiting maintenance vessels; and
- The presence of surface laid cable protection.

32.6.2.3.1 Sensitivity of receptors

315. As discussed in Section 32.6.1.2.1, the sensitivity of visitors engaging in marine tourism and recreational activities is considered to be low due to their ability to re-route around areas of disruption**.**

32.6.2.3.2 Magnitude of impact

316. Similar to the construction phase, NFOW would seek safety zones of an appropriate radius around major maintenance works (including cable repairs and reburial) and advance communications would be provided through the channels identified above in Section 32.3.3.

317. Overall, there will be up to 1,460 annual vessel movements during the O&M period, and the total number of vessels operating on-site simultaneously will be 22. The majority of the annual movements will be from small vessels such as crew transfer vessels.

318. Chapter 15 Shipping and Navigation (Volume I) concludes that impact would be mitigated to ensure the magnitude is tolerable and as low as reasonably practicable.

319. As part of the Project design, cables would be buried where practicable, and where cable protection is required, NFOW would adhere to MCA regulations requiring that a decrease in water depth should not exceed 5%. This is to ensure

under-keel clearance is maintained, thereby mitigating safety risks to passing vessels.

320. Given that disruptions to marine tourism and recreation during the O&M period are likely to be temporary, intermittent, and localised around maintenance works, the overall magnitude of impact on marine tourism and recreational activities is considered to be negligible.

32.6.2.3.3 Significance of effect

321. The resultant effect of O&M disruptions to visitors engaging in marine tourism and recreational activities is negligible, which is not significant in EIA terms.

32.6.2.4 Impact 4 Alterations to PRoW

322. Only one footpath (Little Bromley FP15) within the onshore substation zone may be permanently diverted, depending on the final cable routing and siting of the substation within the zone and the existing route would then be closed. This will be assessed further in the ES, following the final site selection for onshore substation location, which will be undertaken following PEIR consultation. However it is considered likely that an appropriate diversion would be possible (if required) and therefore the impact magnitude would be negligible.

323. As discussed previously, the sensitivity of PRoW is low and therefore the effect significance would be negligible.

32.6.2.5 Impact 5 Reductions in tourist accommodation availability due to a non-resident workforce

324. The analysis of socio-economic impacts related to operational employment in Chapter 31 Socio-economics (Volume I) 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 support offshore works.

325. 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 would most likely be based at a service port within the locality 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 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.

326. Given that peak O&M demand is likely to be minimal compared to the construction phase and NFOW's commitment to maximising local employment, no impact on tourist accommodation availability is predicted.

32.6.3 Potential effects during decommissioning

327. This section describes the potential effects associated with the decommissioning of the onshore and offshore infrastructure with regards to tourism and recreation. Further details are provided in Chapter 5 Project Description (Volume I).

328. It is generally accepted that industry best 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.

329. 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.

330. 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.

331. 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.

332. 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.

333. 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.

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

32.7 Potential monitoring requirements

335. No monitoring associated with tourism and recreation is proposed, however monitoring of impact pathways, such as noise and visual impacts may be required and are discussed in the relevant topic chapters.

32.8 Cumulative effects

32.8.1 Identification of potential cumulative effects

336. 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 32.23.

Table 32.23 Potential cumulative effects

Impact	Potential for cumulative effects	Rationale
Construction		
Visual impacts on marine and coastal tourism and recreational assets	Yes	Cumulative visual effects arising from multiple developments are possible if there is temporal and spatial overlap between the Projects' coastal and/or offshore construction programmes.
Disruptions to marine tourism and recreational activities	Yes	Cumulative direct effects associated with disruptions to marine 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.
Disruptions to coastal tourism and recreational assets	Yes	Cumulative direct effects associated with disruptions to coastal tourism and recreational assets are possible if coastal construction works associated with multiple developments occur concurrently and in proximity to North Falls' landfall area.
Disruptions to onshore tourism and recreational assets	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.
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 with North Falls' onshore construction programme and the high season months.
Disruptions due to construction road traffic	Yes	Cumulative effects associated with disruptions due to construction road traffic may occur at a regional scale if vehicle movements associated with multiple developments have spatial and temporal overlap with North Falls' onshore construction programme.
Operation		
Visual impacts on marine and coastal tourism and recreational assets	Yes	Multiple developments in proximity to North Falls' array areas may be visible to visitors from shore and those engaging in marine tourism and recreational activities.
Noise and visual impacts on onshore 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.
Disruptions to marine tourism and recreational activities	Yes	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.

Impact	Potential for cumulative effects	Rationale
Alterations to PRoW	Yes	Cumulative effects arising from multiple developments in proximity to North Falls have the potential to PRoW and other non-motorised routes should multiple alterations be required.
Reductions in tourist accommodation availability due to a non-resident workforce	No	No impact predicted for the Project alone.
Decommissioning		
Decommissioning strategies have not yet been finalised. However, the cumulative effects are expected to be no greater than those of construction.		

32.8.2 Other plans, projects, and activities

337. 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 32.24 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.

338. 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.

Table 32.24 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 areas (km)	Confidence in data	Included in the CEA	Rationale
National Infrastructure Planning							
Five Estuaries Offshore Wind Farm	Pre-application	2028 – 2030	Scoping area directly overlaps with North Falls' onshore project area	0	High	Yes	The onshore project area for Five Estuaries Offshore Wind Farm 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	Approved (DCO issued in 2022)	Mid 2020s	47	14.8	High	Yes, for long term visual effects from offshore infrastructure 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	47	High	Yes, for long term visual effects from offshore	The onshore infrastructure for this project is not in close proximity to North Falls' onshore project area. However, cumulative visual effects on

Project	Status	Construction period	Closest distance from the onshore project area (km)	Closest distance from the array areas (km)	Confidence in data	Included in the CEA	Rationale
						infrastructure only	coastal and marine tourism and recreational assets could occur.
Greater Gabbard Offshore Wind Farm	Operational since 2012	N/A	N/A	0	Medium	No	These OWFs are operational, therefore visual effects related to the long-term presence of their offshore infrastructure form part of the baseline. Effects associated with episodic O&M activities have low potential to contribute to cumulative effects on coastal and marine tourism and recreational assets.
Galloper Offshore Wind Farm	Operational since 2018	N/A	N/A	0	Medium		
Thanet Offshore Wind Farm	Operational since 2010	N/A	N/A	24.4	Medium		
Gunfleet Sands Offshore Wind Farm	Operational since 2010	N/A	N/A	43.3	Medium		
London Array Offshore Wind Farm	Operational since 2013	N/A	N/A	19.4	Medium		
Proposed interconnectors and other energy transmission infrastructure							
East Anglia GREEN	Pre-application	2027 – 2031	Scoping area directly overlaps with North Falls' onshore project area	N/A	Low	Yes	The proposed substation area for East Anglia GREEN is in close proximity to North Falls' proposed onshore substation zone. Therefore, cumulative effects on onshore tourism and recreational assets could occur.
NeuConnect Interconnector	Pre-construction	2022-2028	N/A	0	High	Yes, for offshore	The NeuConnect Interconnector bisects the North Falls export

Project	Status	Construction period	Closest distance from the onshore project area (km)	Closest distance from the array areas (km)	Confidence in data	Included in the CEA	Rationale
						construction effects only	cable corridor and interconnector cable corridor and there is potential for temporal overlap of cable installation activities. Therefore, 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. 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	Yes, for offshore construction effects only (Subject to available information)	The offshore study area for Nautilus intersects with North Falls' offshore project area, and there is potential for temporal overlap of cable installation activities. Therefore, cumulative effects on marine tourism and recreational assets may occur

Project	Status	Construction period	Closest distance from the onshore project area (km)	Closest distance from the array areas (km)	Confidence in data	Included in the CEA	Rationale
							during the construction phase. As the project is a submarine power cable, there is no potential for cumulative visual effects during the operation phase.
Sea Link	Pre-application	2026-2030	N/A	c. 3.5	Medium	Yes, for offshore construction effects only (Subject to available information)	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 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 (Subject to	Interconnector between UK and Netherlands. Consultation materials show the interconnector making landfall between Aldeburgh and Thorpeness. Thus, there is no

Project	Status	Construction period	Closest distance from the onshore project area (km)	Closest distance from the array areas (km)	Confidence in data	Included in the CEA	Rationale
						available information)	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	Yes (Subject to available information)	Interconnector between UK and Germany
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.
East Orford Ness aggregate exploration and option area 1809	Operational since 2019	N/A	N/A	2	Medium	No	

Project	Status	Construction period	Closest distance from the onshore project area (km)	Closest distance from the array areas (km)	Confidence in data	Included in the CEA	Rationale
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 production agreement area 508	Operational since 2014	N/A	N/A	11.7	Medium	No	
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	

Project	Status	Construction period	Closest distance from the onshore project area (km)	Closest distance from the array areas (km)	Confidence in data	Included in the CEA	Rationale
Onshore developments							
Land adjacent to Lawford Grid Substation Ardleigh Road Little Bromley Essex CO11 2QB	Approved	Predicted to complete within 12 months of construction commencing	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 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	Awaiting decision	Predicted to complete within six months of construction commencing	0.1	N/A	Medium	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.

32.8.3 Assessment of cumulative effects

339. Of the projects identified in Table 32.24, nine projects are considered to have potential to contribute to cumulative effects and are taken for further assessment. Cumulative effects on tourism and recreation during the construction phase are shown in Table 32.25, while cumulative effects during the operation phase are shown in Table 32.26. Cumulative effects during the decommissioning phase are discussed separately at the end of the section.

340. Limited project information is currently available to inform this PEIR. However, this will be kept under review until the PEIR is published and updated for the ES.

32.8.3.1 Construction

Table 32.25 Cumulative effects from other onshore and offshore projects on tourism and recreation during the construction phase

Project	Cumulative effects on marine tourism and recreational assets	Cumulative effects on coastal tourism and recreational assets	Cumulative effects on onshore tourism and recreational assets
Five Estuaries Offshore Wind Farm	The overlapping nature of both North Falls and Five Estuaries OWF offshore project areas and the temporal overlap in the projects' construction programmes could result in potential cumulative effects on visitors engaging in marine tourism and recreational activities such as sailing and fishing. 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. In the case that offshore works occur sequentially, the duration of impacts experienced by visitors would be lengthened but the impact at any one time would be no greater than North Falls alone and so the cumulative effects would remain not significant in EIA terms.	The overlapping nature of both North Falls and Five Estuaries OWF landfall search areas and the temporal overlap in the project's construction programmes could result in potential cumulative effects on visitors to coastal tourism and recreational assets such as coastal PRoW and heritage trails. Marine construction traffic and offshore construction activities associated with both projects may be within visual range of visitors on the coast. These cumulative visual effects would be transient nature, and when viewed from a distance, it is not anticipated that they would despoil the seascape enough to deter visitors from visiting or returning to the coast. Visitors to coastal assets within or neighbouring the landfall area may be concurrently affected by landfall construction associated with North Falls and Five Estuaries Offshore Wind Farm. 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. Any remaining impacts would still be temporary, localised, and reversible, and the significance of effect is unlikely to change. In the case that landfall construction occurs sequentially, the duration of impacts would be lengthened. Regardless, prolonged closures of	The overlapping nature of both North Falls and Five Estuaries OWF onshore project areas and the temporal overlap in the project's construction programmes could result in potential cumulative effects on visitors to onshore tourism and recreational assets such as onshore PRoW and the long distance trail. Visitors to onshore assets may be concurrently affected by visual impacts and disruptions from construction activities associated with North Falls and Five Estuaries Offshore Wind Farm. However, given the low density of tourism and recreation receptors inland, it is unlikely that cumulative effects would alter the significance of effect. Given the interconnectedness of the PRoW network and the temporary diversions and alternative route recommendations that would be implemented as embedded mitigation, it is anticipated that visitors using onshore PRoW and other non-motorised routes would still be able to make use of such assets and engage in recreational activities. However, the spatial extent of disruptions may be distributed over a wider area if the onshore infrastructure and temporary construction compounds are not shared between the projects, and visitors may experience adverse impacts at multiple locations, which could be perceived as a nuisance. In the case that onshore construction occurs sequentially, the duration of impacts would

Project	Cumulative effects on marine tourism and recreational assets	Cumulative effects on coastal tourism and recreational assets	Cumulative effects on onshore tourism and recreational assets
		the beach, coastal PRoW, and other assets at landfall would not be required for both projects. Cumulative effects therefore are not anticipated to be significant in EIA terms.	be lengthened. Any cumulative effects would still be temporary and reversible in nature. Cumulative effects therefore are not anticipated to be significant in EIA terms.
East Anglia GREEN	No cumulative effects on visitors engaging in marine tourism and recreational activities between North Falls and East Anglia GREEN are predicted, as East Anglia GREEN does not have an associated offshore project area.	No cumulative effects on visitors to coastal assets between North Falls and East Anglia GREEN are predicted, as East Anglia GREEN's onshore project area is not located near the coast.	A new onshore substation is proposed to be built as part of East Anglia GREEN proposals by the National Grid. The East Anglia GREEN substation would be near the preferred location for North Falls' onshore substation. However, exact location details are not known at this stage. A temporal overlap in both projects' construction programme could result in potential cumulative effects on visitors to onshore tourism and recreational assets such as onshore PRoW and the long distance trail. Visitors to onshore assets may be concurrently affected by visual impacts and disruptions from construction activities associated with North Falls and East Anglia GREEN. Any cumulative effects would be temporary and reversible in nature and localised around North Falls' onshore substation zone. Cumulative effects therefore are not anticipated to be significant in EIA terms.
NeuConnect Interconnector	The overlapping nature of the offshore project areas for North Falls and the interconnector projects and the temporal overlap in the projects' construction programmes could result in potential cumulative effects on visitors engaging in marine tourism and recreational activities such as sailing and fishing. Under worst case conditions, marine construction traffic and offshore construction	The overlapping nature of the offshore project areas for North Falls and the interconnector projects and the temporal overlap in the project's construction programmes could result in potential cumulative effects on visitors to coastal tourism and recreational assets such as coastal PRoW and heritage trails. Marine construction traffic and offshore construction activities associated with	No cumulative effects on visitors to onshore tourism and recreational assets between North Falls and all interconnector projects are predicted, as their onshore project areas do not overlap with North Falls'.

Project	Cumulative effects on marine tourism and recreational assets	Cumulative effects on coastal tourism and recreational assets	Cumulative effects on onshore tourism and recreational assets
Nautilus Interconnector	activities associated with these projects could occur simultaneously, which could exacerbate visual impacts and navigation-related disruptions such as reduced navigability. However, the significance of effect is unlikely to change, given that few receptors have the capability to travel far enough from 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. In the case that offshore works occur sequentially, the duration of impacts experienced by visitors would be lengthened but the impact at any one time would be no greater than North Falls alone and so the cumulative effects would remain not significant in EIA terms.	these projects may be within visual range of visitors standing at shore. These cumulative visual effects would be transient nature, and when viewed from a distance, it is not anticipated that they would despoil the seascape enough to deter visitors from visiting or returning to the coast. No physical interaction between these interconnectors and North Falls is predicted at the coast as there is no overlap in landfall areas. Cumulative effects therefore are not anticipated to be significant in EIA terms.	
Sea Link			

32.8.3.2 Operation

Table 32.26 Cumulative effects from other onshore and offshore projects on tourism and recreation during the operation phase

Project	Cumulative effects on marine tourism and recreational assets	Cumulative effects on coastal tourism and recreational assets	Cumulative effects on onshore tourism and recreational assets
Five Estuaries Offshore Wind Farm	Once fully constructed and commissioned, there is potential for long term cumulative visual effects on visitors engaging in marine tourism and recreational activities, as North Falls and Five Estuaries OWF would add two OWFs to the seascape off the Essex coast, while East Anglia ONE North and East Anglia TWO Offshore Wind Farm would add	Once fully constructed and commissioned, there is potential for long term cumulative visual effects on visitors to coastal tourism and recreational assets such as coastal PROW and designated sites between North Falls, Five Estuaries, East Anglia ONE North, and East Anglia TWO Offshore Wind Farm. On clear days, OWFs could occupy a wide	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 OWF, should their onshore substations be located within proximity to North Falls'. Therefore, visitors using onshore PRoW and other non-motorised routes in

Project	Cumulative effects on marine tourism and recreational assets	Cumulative effects on coastal tourism and recreational assets	Cumulative effects on onshore tourism and recreational assets
	another two OWFs to the seascape off the Suffolk coast. However, given the low sensitivity of these receptors, it is unlikely that the significance of effect would change. 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 and deter visitors from engaging in marine tourism and recreational activities. Cumulative effects therefore are not anticipated to be significant in EIA terms.	extent of the seaward horizon. However, given the presence of existing wind farms, such Greater Gabbard and Galloper , it is unlikely that the presence of additional wind farms would significantly influence people's visiting behaviours. Cumulative effects therefore are not anticipated to be significant in EIA terms.	the area could experience cumulative visual effects. However, given the low density of receptors around North Falls' onshore substation zone, it is unlikely that the significance of effect would change. Cumulative effects therefore are not anticipated to be significant in EIA terms.
East Anglia ONE North Offshore Wind Farm			No cumulative effects on visitors to onshore tourism and recreational assets between North Falls, East Anglia ONE North, and East Anglia TWO offshore Wind Farm are predicted, as their onshore project areas do not overlap with North Falls'.
East Anglia TWO Offshore Wind Farm			
East Anglia GREEN	No cumulative effects on visitors engaging in marine tourism and recreational activities between North Falls and East Anglia GREEN are predicted, as East Anglia GREEN does not have an associated offshore project area.	No cumulative effects on visitors to coastal assets between North Falls and East Anglia GREEN are predicted, as East Anglia GREEN's onshore project area is not located near the coast.	Once fully constructed and commissioned, there is potential for long term cumulative visual and noise effects on visitors to onshore tourism and recreational assets between North Falls Offshore Wind Farm and East Anglia GREEN, should their onshore substations be located in proximity to North Falls'. Therefore, visitors using onshore PRoW and other non-motorised routes in the area could experience cumulative visual and noise effects. However, given the low density of receptors around North Falls' onshore substation zone, it is unlikely that the significance of effect would change.

Project	Cumulative effects on marine tourism and recreational assets	Cumulative effects on coastal tourism and recreational assets	Cumulative effects on onshore tourism and recreational assets
			Cumulative effects therefore are not anticipated to be significant in EIA terms.

32.8.3.3 Decommissioning

341. There is a high level of uncertainty regarding the decommissioning programme and scope for each of the above projects, however there is potential that some may potentially be decommissioned during the North Falls project lifetime. The detail and scope of the decommissioning works for North Falls will be determined by the relevant legislation and guidance at the time of decommissioning and agreed with the regulator.

342. As a worst case scenario, cumulative effects during the decommissioning phase are assumed to be the same as those identified during the construction phase.

32.9 Interactions

343. 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 32.27 provides a summary of the principal interactions, related chapters and signposts to where those issues have been addressed in this chapter.

Table 32.27 Tourism and recreation interactions

Topic and description	Related chapters (Volume I)	Where addressed in this chapter	Rationale
All phases			
Visual impacts on marine, coastal, and onshore tourism and recreational assets	Chapter 29 Seascape, Landscape, and Visual Impact Assessment Chapter 30 Landscape and Visual Impact Assessment	Section 32.6.1.1 Section 32.6.1.2 Section 32.6.2.1 Section 32.6.2.2	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 within the area and thus its image as a tourist destination.
Deterioration of water quality in designated bathing waters	Chapter 9 Marine Water and Sediment Quality	Section 32.6.1.3 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.
Disruptions to marine tourism and recreational activities	Chapter 15 Shipping and Navigation	Section 32.6.1.2 Section 32.6.2.3	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 affect the attractiveness of an area to visitors engaging in marine tourism and recreational activities such as

Topic and description	Related chapters (Volume I)	Where addressed in this chapter	Rationale
			fishing, sailing, and water sports.
Air pollution impacts on coastal and onshore tourism and recreational assets	Chapter 20 Onshore Air Quality	Section 32.6.1.3	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.
Noise pollution impacts on coastal and onshore tourism and recreational assets	Chapter 26 Noise and Vibration	Section 32.6.1.3 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.
Disruptions due to construction road traffic	Chapter 27 Traffic and Transport	Section 32.6.1.6	Construction road traffic may affect access and cause delays to visitors using the local road network, affecting the attractiveness of an area for visiting.
Disruptions to PRoW and non-motorised routes	Chapter 28 Human Health	Section 32.6.1.3 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.
Consequences of tourism and recreation impacts on the local economy	Chapter 31 Socio-economics	Section 32.6 (all impacts)	The tourism economy contributes significantly to the wider local economy. Impacts to tourism volumes and expenditures could have knock-on effects on other local businesses and employment levels.
Decommissioning			
Potential 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.			

32.10 Inter-relationships

344. 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 32.28. This provides a screening tool for which impacts have the potential to interrelate. Table 32.29 provides an assessment for each receptor (or receptor group) as related to these impacts.

345. Within Table 32.29 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 32.28 Inter-relationships between tourism and recreation impacts - screening

Potential interaction between impacts						
Construction						
	Impact 1: Visual impacts on marine and coastal tourism and recreational assets due to offshore works	**Impact 2: Disruptions to marine tourism and recreational activities**	**Impact 3: Disruptions to coastal tourism and recreational assets**	**Impact 4: Disruptions to onshore tourism and recreational assets**	**Impact 5: Reductions in tourist accommodation availability due to a non-resident workforce**	**Impact 6: Disruptions due to construction road traffic**
Impact 1: Visual impacts on marine and coastal tourism and recreational assets due to offshore works		Yes – Visitors engaging in marine activities may be affected by both disruptions and visual impacts arising from construction.	Yes – Visitors within or near the landfall area may be affected by both disruptions related to landfall construction and visual impacts arising from landfall and offshore construction.	No – Geographical separation prevents visitors from experiencing both impacts simultaneously.	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	Yes – Traffic delays and access issues could exacerbate other impacts on the visitor experience.
Impact 2: Disruptions to marine tourism and recreational activities	Yes – Visitors engaging in marine activities may be affected by both disruptions and visual impacts arising from construction.		Yes – Visitors to coastal areas may also engage in marine activities and thus can be affected by disruptions related to offshore and landfall construction simultaneously.	No – Geographical separation prevents visitors from experiencing both impacts simultaneously.	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find	Yes – Traffic delays and access issues could exacerbate other impacts on the visitor experience.

Potential interaction between impacts						
					alternative accommodation.	
Impact 3: Disruptions to coastal tourism and recreational assets	Yes – Visitors within or near the landfall area may be affected by both disruptions related to landfall construction and visual impacts arising from landfall and offshore construction.	Yes – Visitors to coastal areas may also engage in marine activities and thus can be affected by disruptions related to offshore and landfall construction simultaneously.		No – Geographical separation prevents visitors from experiencing both impacts simultaneously.	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	Yes – Traffic delays and access issues could exacerbate other impacts on the visitor experience.
Impact 4: Disruptions to onshore tourism and recreational assets	No – Geographical separation prevents visitors from experiencing both impacts simultaneously.	No – Geographical separation prevents visitors from experiencing both impacts simultaneously.	No – Geographical separation prevents visitors from experiencing both impacts simultaneously.		No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	Yes – Traffic delays and access issues could exacerbate other impacts on the visitor experience.
Impact 5: Reductions in tourist accommodation availability due to a non-	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either	No – Limited accommodation availability would have no pathway to interact with other impacts as the	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either		No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either

Potential interaction between impacts						
resident workforce	be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	be displaced and therefore not be exposed to other impacts or would find alternative accommodation.		be displaced and therefore not be exposed to other impacts or would find alternative accommodation.
Impact 6: Disruptions due to construction road traffic	Yes – Traffic delays and access issues could exacerbate all other impacts on the visitor experience.	Yes – Traffic delays and access issues could exacerbate all other impacts on the visitor experience.	Yes – Traffic delays and access issues could exacerbate all other impacts on the visitor experience.	Yes – Traffic delays and access issues could exacerbate all other impacts on the visitor experience.	Yes – Limited accommodation availability and road traffic disruptions are both regional impacts, which could together exacerbate all other impacts on the visitor experience.	
Operation						
	Impact 1: Visual impacts on marine and coastal tourism and recreational assets	**Impact 2: Noise and visual impacts on onshore tourism and recreational assets**	**Impact 3: Disruptions to marine tourism and recreational activities**	**Impact 4: Alterations to PRoW**	**Impact 5: Reductions in tourist accommodation availability due to a non-resident workforce**	
Impact 1: Visual impacts on marine and coastal tourism and recreational assets		No – Geographical separation prevents visitors from experiencing both impacts simultaneously.	Yes – Visitors engaging in marine activities may be affected by both disruptions and visual impacts during the life of the Project.	No – Geographical separation prevents visitors from experiencing both impacts simultaneously.	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be	

Potential interaction between impacts						
					exposed to other impacts or would find alternative accommodation.	
Impact 2: Noise and visual impacts on onshore tourism and recreational assets	No – Geographical separation prevents visitors from experiencing both impacts simultaneously.		No – Geographical separation prevents visitors from experiencing both impacts simultaneously.	Yes – diversions (if required) could interact with noise and visual impacts to exacerbate the visitor experience.	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	
Impact 3: Disruptions to marine tourism and recreational activities	Yes – Visitors engaging in marine activities may be affected by both disruptions and visual impacts during the life of the Project.	No – Geographical separation prevents visitors from experiencing both impacts simultaneously.		No – Geographical separation prevents visitors from experiencing both impacts simultaneously.	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	
Impact 4: Alterations to PRoW	No – Geographical separation prevents visitors from	Yes – diversions (if required) could interact with noise and visual impacts to	No – Geographical separation prevents visitors from experiencing both		No – Limited accommodation availability would have no pathway to interact	

Potential interaction between impacts						
	experiencing both impacts simultaneously.	exacerbate the visitor experience.	impacts simultaneously.		with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	
Impact 5: Reductions in tourist accommodation availability due to a non-resident workforce	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.	No – Limited accommodation availability would have no pathway to interact with other impacts as the tourist would either be displaced and therefore not be exposed to other impacts or would find alternative accommodation.		
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 32.29 Inter-relationships between tourism and recreation impacts – phase and lifetime assessment

Receptor category	Highest significance level			Phase assessment	Lifetime assessment
	Construction	Operation	Decommissioning		
Marine tourism and recreational activities	Minor adverse	Minor adverse	Minor adverse	Navigation-related disruptions and visual impacts arising from construction marine traffic and offshore works have the potential to compound and decrease the enjoyment of marine tourism and recreational activities by visitors, leading to a minor adverse effect significance. However, due to the mobile nature of such activities, the effect would most likely be localised and experienced only transiently. During operation, disruptions related to O&M vessel traffic and offshore O&M works 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. 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. 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.
Coastal tourism and recreational assets	Negligible	Minor adverse		During construction, visitors within or near the landfall area 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	

Receptor category	Highest significance level				
	Construction	Operation	Decommissioning	Phase assessment	Lifetime assessment
				150 route and the England Coast path that pass through the landfall area. However, the effect would most likely be highly localised and experienced only transiently. During operation, disruptions related to O&M works in the landfall area 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.	
Onshore tourism and recreational assets	Negligible adverse	Minor 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 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.	

Receptor category	Highest significance level				
	Construction	Operation	Decommissioning	Phase assessment	Lifetime assessment
				During operation, disruptions related to O&M works along the final onshore cable route and around the onshore substation zone 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.	

32.11 Summary

346. Table 32.30 summaries the potential likely significant effects associated with North Falls during the Project's construction, operation, and decommissioning phases.

347. During construction, effects to tourism and recreation are mainly predicted to be localised, temporary, and reversible.

348. 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.

349. Long term visual effects associated with the presence of onshore infrastructure are predicted to be localised around the onshore substation zone

350. Long term visual 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.

351. 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.

Table 32.30 Summary of potential likely significant effects on tourism and recreation

Potential impact	Receptor	Sensitivity	Magnitude of impact	Pre-mitigation effect (including embedded mitigation)	Additional mitigation measures proposed	Residual effect
Construction						
Visual impacts on marine and coastal tourism and recreational assets due to offshore works	Visitors engaging in marine tourism and recreational activities	Low	Negligible	Negligible	N/A	Negligible
	Visitors to coastal tourist destinations within and neighbouring the landfall area	Low		Negligible		Negligible
	Visitors using coastal PRoW and other non-motorised routes	Medium		Minor adverse		Minor adverse
Disruptions to marine tourism and recreational activities	Sailing, yachting, and other recreational crafts;	Low	Low	Negligible	N/A	Negligible
	Recreational fishing	Low		Negligible		Negligible
	Water sports	Low		Negligible		Negligible
Disruptions to coastal tourism and recreational assets	Coastal PRoW and other non-motorised routes	Low	Low	Negligible	N/A	Negligible
	Frinton Golf Club	Low		Negligible		Negligible
	Beach huts	Low		Negligible		Negligible
	Frinton beach	Negligible		Negligible		Negligible
	Holland Haven Country Park	Negligible		Negligible		Negligible

Potential impact	Receptor	Sensitivity	Magnitude of impact	Pre-mitigation effect (including embedded mitigation)	Additional mitigation measures proposed	Residual effect
	Greensward Park	Negligible		Negligible		Negligible
	The Rock Hotel	Low		Negligible		Negligible
	Designated bathing waters	Low		Negligible		Negligible
Disruptions to onshore tourism and recreational assets	Visitors using onshore PRoW and other non-motorised routes	Low	Low	Negligible	N/A	Negligible
	Visitors to nature reserves	Low		Negligible		Negligible
	Recreational users of sports and social assets	Low		Negligible		Negligible
	Accommodation providers	Low		Negligible		Negligible
Reductions in tourist accommodation availability due to a non-resident workforce	Tourists requiring temporary local accommodation	Low	Negligible	Negligible	N/A	Negligible
Disruptions due to construction road traffic	Visitors using the local road network	Low	Low	Negligible	N/A	Negligible
Operation						
Visual impacts on marine and coastal	Visitors engaging in marine tourism and recreational activities	Low	Medium	Minor adverse	N/A	Minor adverse

Potential impact	Receptor	Sensitivity	Magnitude of impact	Pre-mitigation effect (including embedded mitigation)	Additional mitigation measures proposed	Residual effect
tourism and recreational assets	Visitors to coastal tourism and recreational assets in Essex and East Suffolk collectively	Low		Minor adverse		Minor adverse
	Visitors using coastal PRoW and other non-motorised routes	Low		Minor adverse		Minor adverse
Noise and visual impacts on onshore tourism and recreational assets	Visitors using onshore PRoW and other non-motorised routes	Low	Negligible	Negligible	N/A	Negligible
Disruptions to marine tourism and recreational activities	Visitors engaging in marine tourism and recreational activities	Low	Negligible	Negligible	N/A	Negligible
Alterations to PRoW	Visitors using onshore PRoW	Low	Negligible	Negligible	N/A	Negligible
Reductions in tourist accommodation	Tourists requiring temporary local accommodation	Low	No impact	No effect	N/A	No effect

Potential impact	Receptor	Sensitivity	Magnitude of impact	Pre-mitigation effect (including embedded mitigation)	Additional mitigation measures proposed	Residual effect
availability due to a non-resident workforce						
Decommissioning						
Potential 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.						

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