PROPOSED NAVITUS BAY WIND PARK

PRELIMINARY ENVIRONMENTAL INFORMATION 3

CHAPTER 32
ONSHORE SOCIO-ECONOMICS AND TOURISM

SEPTEMBER 2013

NAVITUSBAY

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TABLE OF CONTENTS

32.1. Introduction 1
32.2. Legislation, Policy and Guidance 1
32.3. Assessment methodology 4
32.4. Baseline Environment 18
32.5. Impact Assessment 23
32.6. Potential Mitigation 31
Glossary 34
Abbreviations 34

LIST OF TABLES

Table 32.1 National policy statement 2
Table 32.2 Feedback received to the Scoping Request 8
Table 32.3 Consultation undertaken to date 9
Table 32.4 Scope of the onshore socio-economic and tourism impact assessment 13
Table 32.5 Socio-economic receptor sensitivity 13
Table 32.6 Socio-economic magnitude of effect 14
Table 32.7 Tourism receptor sensitivity 15
Table 32.8 Tourism magnitude of effect 15
Table 32.9 Definition of impact significance 16
Table 32.10 Technical reports – scope and methodology 18
Table 32.11 Educational attainment – Bournemouth and Hampshire 20
Table 32.12 Skills in the workforce – Bournemouth, Dorset and Hampshire 20
Table 32.13 Economically active and inactive by drive time area 20
Table 32.14 Employment in manufacturing and construction by drive time area 21
Table 32.15 Number of domestic trips, nights and spend 2009-2011 21
Table 32.16 Tourism employment 23
Table 32.17 Assessment parameters relevant to the socio-economic impact assessment 23
Table 32.18 Assessment parameters Relevant to the Tourism Impact Assessment 24

LIST OF FIGURES

Figure 32.1 Study Area 6
Figure 32.2 Study Area, Onshore Socio-economic 7
Figure 32.3 Impact Significance Matrix 16

32. ONSHORE SOCIO-ECONOMICS AND TOURISM

32.1. Introduction

32.1. This assessment considers the potential socio-economic and tourism impacts arising from the onshore components of the proposed Navitus Bay Wind Park ("Project") during the construction, operation and maintenance (O&M) and decommissioning phases. For the purpose of this assessment, the Onshore Development Area comprises the following project elements: the cable landfall, a 35km onshore cable and associated accesses, temporary compounds and a new proposed onshore substation. This assessment details the potential impacts upon the labour market, tourism businesses and the tourism economy in the study area as a result of the onshore components of the Project.

32.2. Socio-economic analysis examines the interaction between the development, and the local and wider economy.

32.3. Tourism analysis is concerned with the attraction of visitors of all types, including leisure, business and holiday visitors. The assessment includes visitor volumes and characteristics, key attractions and related business effects.

32.4. This assessment has been informed by studies to identify the baseline context, which include: analysis of the supply chain; identification of the policy context; interviews with tourism businesses, conference facilities, language schools and festival and event organisers.

32.5. As the export cables would be installed underground, the primary changes to visitor numbers may be experienced from visual impacts and obstruction or disturbance during the construction phase; or the visual impact of the substation during the construction and operation and maintenance phases.

32.6. While the onshore aspects of the Project include supply chain impacts (i.e. the pattern of purchasing goods and services for the construction and operation of the Project), these are primarily discussed and assessed in the Offshore Socio-economic and Tourism assessment (refer to Chapter 21 for details), with some limited additional comment and analysis in this assessment.

32.2. Legislation, Policy and Guidance

32.7. This section outlines the legislation, policy and guidance that is relevant to this assessment. Professional judgement has been applied on their relevance and importance to the assessment.

32.2.1. International

32.8. There is no international legislation or guidance relevant to this assessment.

32.2.2. National

32.9. The relevant national policies are discussed below.

32.10. This section should be read in conjunction with Chapter 3 which details the legal and policy context within which an impact assessment should be undertaken, for example the EIA Regulations Infrastructure Planning (Environmental Impact Assessment) Regulations 2009 (as amended, 2012).

National Policy Statements

32.11. The Overarching National Policy Statement ('NPS') for Energy EN-1 ('EN-1') in conjunction with the NPS for Renewable Energy Infrastructure EN-3 ('EN-3'), and Electricity Networks Infrastructure EN-5 ('EN-5') provide the primary policy framework for the Project and will be considered during the application process for a Development Consent Order ('DCO'). Table 32.1 details the relevant parts of the NPSs and directs the reader to where this is addressed.

Table 32.1 National policy statement	
Summary of NPS	Where addressed in PEI3
National Policy Statement EN-1	
Paragraph 4.1.3 requires the IPC [now the Planning Inspectorate] to take into account the following when weighing the adverse impacts of a proposed development against its benefits: *"- its potential benefits including its contribution to meeting the need for energy infrastructure, job creation and any long-term or wider benefits; and …"*	The Impact Assessment section, in combination with the Offshore Socio-economics and Tourism assessment, identifies the potential of the Project to generate employment opportunities.
Paragraph 4.1.4 requires the IPC [now the Planning Inspectorate] to *'take into account environmental, social and economic benefits and adverse impacts, at national, regional and local levels…'*	The Impact Assessment section, in combination with the Offshore Socio-economics and Tourism assessment, identifies the potential impacts of the Project.
Paragraph 4.2.2 requires an applicant to *'set[s] out information on the likely significant social and economic effects of the development, and shows how any likely significant effects would be avoided or mitigated'*.	The Impact Assessment section identifies the potential impacts and potential mitigation from a socio-economic perspective.
Paragraph 4.2.6 requires the IPC [now the Planning Inspectorate] to *'consider how the accumulation of, and interrelationships between, effects might affect the environment, economy or community as a whole, even though they may be acceptable when considered on an individual basis with mitigation in place.'*	The ES that will form part of an application for development consent will include an assessment of the interrelationships between all environmental topics, including the effects that might affect the environment, economy and the community. It is anticipated that an application would be submitted in early 2014.
Paragraph 4.2.7 recognises that *'In some instances it may not be possible at the time of the application for development consent for all aspects of the proposal to have been settled in precise detail. Where this is the case, the applicant should explain in its application which elements of the proposal have yet to be finalised, and the reasons why this is the case.'*	Matters which are yet to be settled in precise detail are described in the Assessment Methodology section, insofar as they are relevant to this assessment.
Paragraph 5.12.2 states that *'Where the Project is likely to have socio-economic impacts at local or regional levels, the applicant should undertake and include in their application an assessment of these impacts as part of the ES..'*	The Impact Assessment section details the potential socio-economic and tourism impacts of the Project at a local, regional and national level.
Paragraph 5.12.3 states that an assessment should *'consider all relevant socio-economic impacts, which may include:* - *the creation of jobs and training opportunities;* - *the provision of additional local services and improvements to local infrastructure, including the provision of educational and visitor facilities;* - *effects on tourism;* - *the impact of a changing influx of workers during the different construction, operation and decommissioning phases…* - *cumulative effects…"*	The Impact Assessment section details the potential socio-economic and tourism impacts insofar as they relate to the matters identified in EN-1. An assessment of potential cumulative effects will be included in the ES that forms part of an application for development consent.
Paragraph 5.12.4 requires applicants to *'describe the existing socio-economic conditions in the areas surrounding the proposed development and should also refer to how the development's socio-economic impacts correlate with local planning policies.'*	The Baseline Environment section describes the existing socio-economic conditions of relevance to this assessment. The relevant policy context is detailed in this Legislation, Policy and Guidance section. Both the baseline environment and policy context are considered as part of the assessment of potential impacts, which are

	identified in the Impact Assessment section.
Paragraph 5.12.5 acknowledges that *'Socio-economic impacts may be linked to other impacts, for example the visual impact of a development…but may also have an impact on tourism and local businesses.'*	The ES that will form part of an application for development consent will include an assessment of the inter-relationships between all environmental topics. Notwithstanding, for the purposes of this assessment consideration has been given to other potential impacts.
Paragraph 5.12.6 states that *'The IPC [now the Planning Inspectorate] should have regard to the potential socio-economic impacts of new energy infrastructure identified by the applicant and from any other sources that the IPC considers to be both relevant and important to its decision.'*	The ES that will form part of an application for development consent will include an assessment of the cumulative impacts of the Project.
Paragraph 5.12.8 states that *'The IPC [now the Planning Inspectorate] should consider any relevant positive provisions the developer has made or is proposing to make to mitigate impacts…and any legacy benefits that may arise as well as any options for phasing development in relation to the socio-economic impacts.'*	The Impact Assessment section details the potential mitigation and positive provisions which may be secured in connection with the Project, whilst ensuring these are necessary and reasonable. It will be for the Examining Authority, and ultimately the Secretary of State, to consider whether these measures and others proposed in connection with the Project are acceptable, having regard to the representations of stakeholders.
Paragraph 5.12.9 states that *'The IPC [now the Planning Inspectorate] should consider whether mitigation measures are necessary to mitigate any adverse socio-economic impacts of the development…'*	
National Policy Statement EN-3	
There are no specific paragraphs of relevance to this assessment.	
National Policy Statement EN-5	
There are no specific paragraphs of relevance to this assessment.	

National Planning Policy Framework

32.12. The National Planning Policy Framework (NPPF) sets out 'the Government's planning policies for England and how these are expected to be applied'. The NPPF does not contain specific policies for nationally significant infrastructure projects. In these cases, applications for development consent are:

"to be determined in accordance with the decision-making framework set out in the Planning Act 2008 and relevant national policy statements for major infrastructure, as well as any other matters that are considered both important and relevant (which may include the National Planning Policy Framework)."

32.13. The NPPF identifies 12 principles on which planning decisions are to be made. The following are relevant to the consideration of socio-economic and tourism impacts arising from the Project:

- "Proactively drive and support sustainable economic development to deliver…infrastructure and thriving local places that the country needs…;
- "Always seek to secure high quality design and a good standard of amenity…;
- "…encourage the use of renewable resources…;
- "Take account of and support local strategies to improve health, social and cultural wellbeing for all…".

32.2.3. Regional and local policy

32.14. A literature review has identified the following relevant policy and related documentation to inform this assessment:

- Core Strategies, Development Plan Documents:
  - Purbeck Local Plan Part 1 (Adopted), November 2012;
  - Bournemouth Core Strategy (Adopted), October 2012;
  - Poole Core Strategy (Adopted), 2009;
  - Isle of Wight Core Strategy (Adopted), 2012;
  - New Forest District Core Strategy (Adopted), 2009;
  - New Forest National Park Core Strategy (Adopted), 2010;

- Christchurch and East Dorset Core Strategy (Pre-Submission), April 2012.

- Economic Development Strategies:
  - Raising the Game – Building a More Competitive Economy in Bournemouth, Dorset and Poole 2005 – 2016;
  - Isle of Wight Economic Strategy 2008 – 2020;
  - Isle of Wight Economic Development Plan 2011/12 – 2013/14;
  - Economic Strategy for New Forest District, 2006;
  - Dorset Local Economic Partnership: Prospectus 2011;
  - Enterprise M3 – Strategy for Growth Discussion Document 2012;
  - Solent LEP Strategy for Growth 2012.
- Tourism and Recreation Strategies:
  - Towards 2015: Shaping Tomorrow's Tourism;
  - Dorset and East Devon Coast World Heritage Site Management Plan 2009 – 2014;
  - Bournemouth and Poole Strategic Framework 2008 – 2010;
  - Christchurch and East Dorset Tourism Key Issue Paper, 2010;
  - The Isle of Wight 2020 Vision for Tourism – Working Smarter Towards a Sustainable Future, 2005;
  - Isle of Wight Island Tourism Strategy Discussion Paper, 2011;
  - Our Future Together II – Tourism Strategy, New Forest District and National Park, 2009;
  - A Tourism Strategy for Purbeck 2008-2013;
  - Bournemouth and Poole: Sport and Recreation Built Facilities Strategy and Action Plan, 2007;
  - Bournemouth Green Space Strategy, 2007 – 2011;
  - New Forest National Park Recreation Management Strategy, 2010 – 2030.
- Renewable Energy Strategies:
  - Bournemouth, Dorset and Poole Renewable Energy Strategy to 2020, 2010;
  - Renewable Energy Potential Assessment in the New Forest District, 2010;
  - Eco-Island – The Isle of Wight Community Strategy.

32.3. Assessment methodology

32.15. This assessment requires separate and distinct assessments of for the socio-economic and tourism aspects. The Project's Zone of Influence ('ZoI') and the impact assessment methodology therefore varies for socio-economics and tourism. The relevant study areas are as follows:

32.3.1. Study area

32.16. Different study areas have been used in the impact assessment based on the ZoI of the Project.

32.17. Tourism is an important part of the local and regional economy (as highlighted in the Scoping Opinion and from subsequent discussion with tourism stakeholders). Therefore, separate consideration of the potential effects is warranted.

Socio-economic study area

32.18. The study area used for the socio-economic assessment comprises the counties of Dorset and Hampshire, as well as the unitary authorities of Poole, Bournemouth, the Isle of Wight, Portsmouth and Southampton. This area is shown in Figure 32.1. The study area was defined as the key areas of population and economic activity around the Project, as well as the rural hinterland. This reflects the likely labour market catchment during the construction, operation and maintenance, and decommissioning phases.

32.19. In order to assess the capacity of the labour market to absorb the jobs created by the construction, operation and decommissioning phases of the Project, 30, 45 and 60-minute drive-times from the proposed Onshore Substation have been used as the basis of analysis for this aspect alone. These isochrones have been adopted to reflect the maximum drive times which potential workers may consider in taking up employment opportunities related to the Project.

Tourism study area

32.20. The tourism study area is shown in Figure 32.2. This has been defined by a 2 km buffer either side of the Onshore Cable Corridor and a 3 km buffer surrounding the onshore electricity substation. The buffer applied is considered to represent the area most likely to be affected by the onshore elements of the Project in relation to tourism. These impacts may include physical obstruction from cabling activities or disturbance from construction (e.g. from machinery, site traffic) and visual impact from construction works or from the completed substation once built.

32.21. Refer to the Offshore Socio-economic and Tourism assessment for details of the wider tourism context of the Project, which covers the unitary authorities of Bournemouth, Poole and the Isle of Wight, along with the districts of Purbeck, Christchurch, East Dorset and the New Forest.

410000

425000

95000

95000

Moors Valley Country Park

Holt Heath

Avon Heath Country Park

West Moors

Hurn Forest

River Avon

New Forest

New Forest

Bournemouth

0 2.5 5 Km

Legend

- Onshore Development Area
- Study Area

Scale @A3 1:100,000	**Coordinate System:** British National Grid	N
Date: 08/08/2013	**Datum:** OSGB 1936	
Ref. No.: PMSSRM/130702161	**Data Source** RTP SeaZone OS	
Fig. No.: Figure 32.1		
Author: NDU		
Rv.No.: 01	**Checked:** RM	**Approved:** SMF

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Study Area

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360000 410000 460000

130000 130000

80000 80000

Onshore Substation Site

Contains Ordnance Survey data © Crown copyright and database right 2013

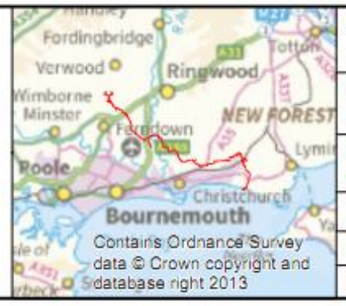
Legend

- Onshore Development Area
- Onshore Substation Site
- Socio-economic Study Area

Drivetime from Onshore Substation Site

- 30 Minutes
- 45 Minutes
- 60 Minutes

0 10 20 km



Scale @A3 1:500,000	**Coordinate System:** British National Grid	N
Date: 10/08/2013	**Datum:** OSGB 1936	
Ref. No.: 0110130810324/01	**Data Source** OS PBA Roger Tym	
Fig. No.: Figure 32.2		
Author: CG		
Rv.No.: 01	**Checked:** AD	**Approved:** SMF

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Study Area, Onshore Socio-economic

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32.3.2. Consultation

32.22. This section, including Tables 32.2 and 32.3, details the consultation undertaken to date, which has informed this assessment.

32.23. A Scoping Report was prepared and a Scoping Opinion was requested from the Infrastructure Planning Commission ('IPC') (now the Planning Inspectorate) in September 2011. Table 32.2 details the principle comments received in the Scoping Opinion in November 2011, in respect of socio-economic and tourism matters and cross references to where each of these comments are addressed in this assessment.

Table 32.2 Feedback received to the Scoping Request

Organisation	Summary of response	Where addressed in PEI
Planning Inspectorate	The key potential environmental issues identified for both the on and offshore elements of the Project included impacts on recreational users and tourism.	The Impact Assessment section identifies the potential impacts arising from the Project insofar as they relate to these matters.
	It was requested that the rationale for scoping out recreation matters from the onshore socio-economic assessment is clearly stated.	Recreation matters are assessed in a separate chapter.
	It was queried how the on and offshore chapters would be split.	Separate assessments have been undertaken for the on and offshore components of the Project. However, for some matters (such as employment) an assessment has been undertaken for the Project. Clarification is provided within the Impact Assessment section on a topic by topic basis.
	It was stated that appropriate cross-referencing should be made to other topics, as relevant.	The ES that will form part of the application for development consent will include an assessment of the interrelationships between all environmental topics.
	It was stated that the assessment should identify both adverse and beneficial impacts on the local community, to include the number and type of jobs generated; and detail the potential influx of workers and detail how they will be accommodated.	The Impact Assessment section identifies the potential impacts on the local community.
	Consider the cumulative impacts of other projects from a socio-economic perspective.	The ES that will form part of the application for development consent will include a cumulative impact assessment.
	Assess the potential impacts of electromagnetic fields around the proposed substation on health.	An assessment of potential electromagnetic fields around the proposed substation will form part of the ES that will form part of the application for development consent.
Borough of Poole	It was advised that consultation in relation to tourism matters should take place with local tourism offices, such as Poole Tourism, given that the South West Tourism Board no longer exists.	Details of the consultation undertaken to date are detailed in this Table 32.3.
Bournemouth Borough Council	Clarity was sought on how the assessment of impacts would be undertaken.	Refer to the Assessment Methodology section for details.

Table 32.2 Feedback received to the Scoping Request		
Lymington and Pennington Town Council	It was stated that the site is too prominent in an area where many livelihoods rely on tourism.	Refer to the Impact Assessment section for details.
Purbeck District Council	It was stated that the ES must recognise the importance of tourism on the local economy of Purbeck. A number of other stakeholders were identified for the applicant to engage with, to include Destination Management Organisations, the Dorset and East Devon World Heritage Site Team and the Dorset Coast Forum. It was stated that any potential impacts on onshore ornithology should have an impact on tourism in Purbeck.	Refer to the Impact Assessment section for details of the potential impacts on the tourism sector in Purbeck. The ES that will form part of an application for development consent will include an assessment of the interrelationships between all environmental topics, including those between the socio-economic and tourism, and ornithology assessments.

32.24. Table 32.3 details the consultation undertaken with stakeholders to date in respect of socio-economic and tourism matters.

Table 32.3 Consultation undertaken to date		
Organisation and date	Summary of response	Where addressed PEI
Bournemouth and Poole Tourism Management Boards, April 2012	The boards were approached on the scope of an assessment to understand the potential impact of the Project on the tourism sector. Feedback was received	Refer to the Baseline Environment section for details of the findings from the surveys undertaken, which include interviews with local businesses.

Table 32.3 Consultation undertaken to date		
	regarding the need for visuals and an assessment of tourism impacts year round.	
Supply Chain Events, June 2012	A supply chain event was held in both Poole and Newport on the Isle of Wight, with approximately 50 companies in attendance as well as NBDL and its specialist technical consultants. The purpose was to share information with the business community and gathering information on capability of local companies.	Refer to the Baseline Environment section for details of the findings from the supply chain event.

Table 32.3 Consultation undertaken to date

Tourism officials /representatives across the study area Bournemouth Borough Council; Christchurch and East Dorset Borough Councils (shared service);Isle of Wight Chamber of Commerce; Isle of Wight Council; New Forest District Council; New Forest Tourism Association; Bournemouth Tourism Management Board Poole Tourism Management Board Purbeck District Council; Swanage & Purbeck Hospitality Association.	The draft Business Survey questionnaire was circulated for information/comment. Various comments were received from officers, 19 June 2012.	Interviews were held with some local tourism businesses, conference facilities, language schools and festivals and event's organisers. Refer to the Baseline Environment section for details.
Dorset County Council, July 2012	In response to the Preliminary Environmental Information (PEI) 2 consultation, the Council stated that the following matters should be addressed as part of an impact assessment: economic impacts on the tourism, fisheries, boat building, shipping and manufacturing industries; and consideration be given to skills and learning	Refer to the Impact Assessment section for details.

Table 32.3 Consultation undertaken to date

	opportunities. It was also stated that the 10km study area for the Business Survey needs to be justified.	
Milford Parish Council, July 2012	In response to the Preliminary Environmental Information (PEI) 2 consultation, the Parish Council stated that economic impacts on the tourist, fishing, shipping and recreational boating industries will be impacted.	Refer to the Impact Assessment section for details.
East Stoke Parish Council, July 2012	In response to the Preliminary Environmental Information (PEI) 2 consultation, the Parish Council stated that the wind park may affect tourism in the local area.	Refer to the Impact Assessment section for details.
West Lulworth Parish Council, July 2012	In response to the Preliminary Environmental Information (PEI) 2 consultation, the Parish Council stated that the wind park may have an adverse impact on tourism.	Refer to the Impact Assessment section for details.
Health Protection Agency (HPA), July 2012	In response to the Preliminary Environmental Information (PEI) 2 consultation, the HPA stated their position in relation to applications for onshore and offshore wind farms.	Refer to the Impact Assessment section for details.
National Trust, July	In response to the	Refer to the Impact

Table 32.3 Consultation undertaken to date		
2012	Preliminary Environmental Information (PEI) 2 consultation, the National Trust stated it would be keen to comment on tourism-related studies.	Assessment section for details.
East Lulworth Parish Council, July 2012	In response to the Preliminary Environmental Information (PEI) 2 consultation, the Parish Council stated that the wind park would not create any jobs, as the turbines would be manufactured overseas.	Refer to the Impact Assessment section for details.
Christchurch Tourism Association, July 2012	Views were sought on the approach to assessing impacts on the visitor economy. Comments on the visuals to be used were received.	Refer to the Impact Assessment section for details.
Landowner, July 2012	In response to the Preliminary Environmental Information (PEI) 2 consultation, a landowner stated that the Project would have a visual impact which could have an effect on local tourism.	Refer to the Impact Assessment section for details.
Tourism officers at local authorities in the study area, December 2012 Bournemouth Borough Council; Christchurch Borough Council; East Dorset District Council; New Forest District Council; New Forest National Park Authority; Isle of Wight Council; Borough of Poole; Purbeck District Council; Dorset County Council; Hampshire County Council.	The Tourism and Recreation Research Framework was circulated for information/comment, prior to discussion at Tourism Liaison Group.	Refer to the Impact Assessment section for details.
Tourism Liaison Group, January 2013	The scope of the Framework was presented and discussed. No further research elements were identified for inclusion.	
Tourism officers (see list above) at local authorities within the study area, March 2013	Requests were made to each tourism officer to seek to obtain any data they may have. Responses were received from Hampshire, Isle of Wight, Poole and New Forest.	Refer to the Impact Assessment section for details.
Bournemouth Borough Council, March and April 2013	Adhoc queries and requests for information.	Responses provided to the correspondence.
Christchurch and East Dorset District Councils, March 2013	Request for individual meeting (or telephone discussion if more convenient) regarding tourism sensitivity and impacts. Meeting informed the Survey Report: Tourism Business Survey and Conference Facilities, Language Schools and Festivals and Events Organisers' Surveys.	Refer to the Impact Assessment section for details.
Hampshire County	Meeting held to discuss the	Refer to the Impact

Table 32.3 Consultation undertaken to date		
Council, March 2013	Characteristics of tourism in the New Forest and potential impacts from the Project. Meeting informed the Survey Report: Tourism Business Survey and Conference Facilities, Language Schools and Festivals and Events Organisers' Surveys.	Assessment section for details.
Spring Visitor Surveys, March and April 2013	The survey involved personal interviews with a random sample of 507 visitors during part of the Spring tourism season from March and April 2013. Sampling points were the locations where the Turbine Area of the Project is most likely to be most visible.	Refer to the Baseline Environment section for details of the findings from the surveys undertaken.
West Dorset and Weymouth District Councils, April 2013	Request for individual meeting (or telephone discussion if more convenient) regarding tourism sensitivity and impacts. Meeting informed the Survey Report: Tourism Business Survey and Conference Facilities, Language Schools and Festivals and Events Organisers' Surveys.	Refer to the Impact Assessment section for details.
Local tourism-related businesses, March and April 2013	Interviews were conducted with local tourism-related businesses to understand	Interviews were held with some local tourism businesses, conference

Table 32.3 Consultation undertaken to date		
	their views on the potential impacts of the Project on their business. Businesses contacted were identified due to their siting either within: a 10km strip from the coastline closest to the proposed development site, stretching from the Purbeck Peninsula to the east of the Isle of Wight; or 2km of the proposed Onshore Cable and Substation.	facilities, language schools and festivals and event's organisers. Refer to the Baseline Environment section for details.
New Forest District Council, May 2013	Meeting to discuss the characteristics of tourism on the New Forest and potential impacts from the Project. Meeting informed the Survey Report: Tourism Business Survey and Conference Facilities, Language Schools and Festivals and Events Organisers' Surveys.	Interviews were held with some local authorities. Refer to the Baseline Environment and Impact Assessment sections for details.

32.25. Regard will be given to any additional feedback received and this will inform the completion of the Environmental Impact Assessment.

32.3.3. Scope of assessment

32.26. The scope of the assessment has been developed taking account of: assessments of offshore wind farms and their onshore infrastructure elsewhere; the approach proposed in the Scoping Report and response in the Scoping Opinion and consultees comments and feedback.

32.27. Table 32.4 details the scope of this assessment, having regard to the potential impacts that may arise.

Table 32.4 Scope of the onshore socio-economic and tourism impact assessment

Assessment topic	Receptor	Scope
Supply chain	Labour Market	Considers the extent to which the local and regional labour market can provide labour services and skills, and the extent to which there is business capacity to supply the components of the Project-either directly or indirectly-based upon the supply chain modelling and the baseline data. Key socio-economic indicators used to inform this assessment are: ➢ Population and skills: education and training current attainment levels; population growth; average earnings; employment by occupational groups. ➢ Socio-economic potential: industry profile (particularly ➢ manufacturing and construction); economic activity; unemployment; education and training future provision.
Tourism	Tourism businesses Tourism economy	➢ Key socio-economic indicators used to inform this assessment are: tourism employment; tourism business density; tourism-related business impacts (established by the tourism business survey); origin of tourism business customer base.

32.28. The supply chain analysis has regard to both the onshore and offshore components of the Project and is presented in the Offshore Socio-economic and Tourism assessment (Chapter 21). This analysis was based upon three scenarios which assumed a varying level of local and regional input ("high", "medium" and "low") into the supply chain during the construction, operation and maintenance, and decommissioning phases.

32.29. Certain elements of the supply chain analysis have been used to inform the impact assessment, specifically to provide an indication of the scale of labour market impacts in relation to the onshore components of the Project. This assessment of potential onshore impacts does not include the supply of materials and components, which is presented in Chapter 21.

32.3.4. Socio-economic impact assessment methodology

Sensitivity of Receptor

32.30. For economic impacts and effects (including employment), the availability of labour and skills is critical in accommodating the demands, needs and requirements of the onshore components of the Project. Adequate capacity results in a low sensitivity, while limited capacity results in a high sensitivity. Sensitivity criteria are detailed in Table 32.5.

Table 32.5 Socio-economic receptor sensitivity

Sensitivity	Definition
High	There is low/limited availability of labour and skills in the area's workforce (this is dependent on specific project requirements and the degree to which they can be met in the area under consideration). The Project would lead to labour market pressure and distortions (i.e. wage inflation, skills and capacity shortages, import of labour).
Medium	There is a constrained supply of labour and skills in the area's workforce. The Project may lead to labour market pressure and distortions (i.e. wage inflation, skills and capacity shortages, import of labour).
Low	There is a readily available labour force, albeit some skill deficits exist. The Project is unlikely to lead to labour market pressure and distortions (i.e. wage inflation, skills and capacity shortages, import of labour).

Table 32.5 Socio-economic receptor sensitivity	
Imperceptible	There is a readily available labour force and skills. The Project would not lead to labour market pressure and distortions (i.e. wage inflation, skills and capacity shortages, import of labour).

32.31. The key socio-economic indicators in relation to the labour and skills, as defined in Table 32.5, include:

- Skills: proportion of skilled workforce; and educational attainment levels;
- Capacity: proportion of relevant workforce (i.e. manufacturing and construction workers); available labour force (unemployed workforce) and educational and training provision.

Magnitude of effect

32.32. A level of impact significance has been ascribed based on the information on the socio-economic outputs and the baseline structure of the area. In economic terms, the key socio-economic receptors are participants in the labour force and the level of occupational skills available in the study area.

32.33. The magnitude of the effect of potential impacts on socio-economic receptors will be assessed as defined in Table 32.6.

Table 32.6 Socio-economic magnitude of effect	
Magnitude	Factors in the assessment of the magnitude of effect
High	Effects would be observed on an international, national or regional scale; and/or where the number of jobs created or lost in the study area would be greater than 250 (based upon EU guidance definition of small and medium enterprises). Effects would be of long-term duration (i.e. greater than 5 years). Frequency is not a relevant consideration.
Medium	Noticeable effects would arise that may be judged to be important at a local scale, either because there are large effects on few receptors or smaller effects on a larger proportion of receptors; and/or where the number of jobs created or lost in the study area would be greater than 50, but fewer than 250. Effects would be medium-term (i.e. 3-5 years). Frequency is not a relevant consideration.
Low	Small scale effects would arise, with a limited number of affected receptors and/or where the number of jobs created or lost in the study area would be greater than 10, but fewer than 50. Effects would be short-term (i.e. 1-2 years). Frequency is not a relevant consideration.
Imperceptible	Where an effect would not be discernible; and/or where fewer than 10 jobs would be created or lost within the study area. Effects would be temporary (i.e. experienced for less than one year).

32.3.5. Tourism Impact Assessment Methodology

32.34. Tourism behaviours would only be adversely impacted when the onshore components of the Project change either the visitor or user pattern in terms of numbers and/or expenditure. In considering such factors, opportunities for related expenditure, any potential for variation and its consequent effect on turnover or employment would be of importance. This assessment highlights potential impacts and their likelihood.

32.35. The significance of these impacts is determined through an understanding of the sensitivity of a receptor and the anticipated magnitude of effect.

Sensitivity of Receptor

32.36. In considering the level of tourism sensitivity, the standing of the receptor or resource is the defining factor. This is established against the following:

- a tourism business relative attraction to customers from outside the study area and the Project's potential to influence broader perceptions of the area;
- the relative importance of tourism as a business sector, where tourism is more important relative to other sectors' impacts may have the potential to generate broader impacts.

32.37. The main factors relevant to this consideration are outlined in Table 32.7.

Table 32.7 Tourism receptor sensitivity

Sensitivity	Definition
High	In relation to tourism businesses where more than 50% of the customer base is drawn from outside the regional area. In relation to the importance of the tourism economy within the study area where the proportion of tourism related employment at the relevant local authority level (or combination of local authorities) is in the 1st quartile of GB local authorities ([1] i.e. above 9.7%).
Medium	In relation to tourism businesses where greater than 25% of the customer base, but less than 50%, is drawn from outside the regional area. In relation to the importance of the tourism economy within the Study Area, where the proportion of tourism related employment at the relevant local authority level (or combination of local authorities) is in the 2nd quartile of GB local authorities (i.e. between 7.9% and 9.6 %).
Low	In relation to tourism businesses where greater than 10% of the customer base, but less than 25%, is drawn from outside the regional area. In relation to the importance of the tourism economy within the study area, where the proportion of tourism related employment at the relevant local authority level (or combination of local authorities) is in the 3rd quartile of GB local authorities (i.e. between 6.8% and 7.8%).

Table 32.7 Tourism receptor sensitivity

Imperceptible	In relation to tourism businesses where less than 10% of the customer base is drawn from outside the regional area. In relation to the importance of the tourism economy within the study area, where the proportion of tourism related employment at the relevant local authority level (or combination of local authorities) is in the 4th quartile of GB local authorities (i.e. up to 6.7 %).

Magnitude of Effect

32.38. The magnitude of effect will be gauged by estimating the amount of change on the receptor arising from the Project, or relevant components. The magnitude of change will be evaluated in line with the criteria set out in Table 32.8.

Table 32.8 Tourism magnitude of effect

Magnitude	Factors in The Assessment of the Magnitude of Effect
High	Where the perceived impact on turnover/customer base is considered by over a half of the Business Survey respondents to be high (i.e. greater than 15% reduction or increase) and moderate (i.e. greater than 10% but less than 15% reduction or increase). Effects are of long-term duration (i.e. greater than 5 years).
Medium	Where the perceived impact on turnover/customer base is considered by between a third and a half of businesses surveyed to be high (i.e. greater than 15% reduction or increase) and moderate (i.e. greater than 10% but less than 15% reduction or increase). Effects are of a medium-term (i.e. 3-5 years).
Low	Where the perceived impact on turnover/customer base is considered by between less than a third of businesses surveyed to be high (i.e. greater than 15% reduction or increase) and moderate (i.e. greater than 10% but less than 15% reduction or increase). Effects are of a short-term (i.e. 1-2 years).

[1] Quartiles of 371 GB local authority areas reported by the ABI (2008) on NOMIS (low 4.1%, high 30.7%)

Table 32.8 Tourism magnitude of effect	
Imperceptible	Where less than 5% of businesses surveyed considered the perceived impact on turnover/customer base to be high (i.e. greater than 15% reduction or increase) or moderate (i.e. greater than 10% but less than 15% reduction or increase), and where over two thirds of respondents consider that there would be no perceived impact on turnover/customer base. Effects are temporary (i.e. experienced for less than one year).

32.3.6. Significance of Impact

32.39. Impact significance is the term used to categorise potential impacts (e.g. negligible, minor, moderate and major); and can be adverse, neutral or beneficial. Likely significant impacts are reported in this assessment as either Significant (i.e. those determined to have a significance rating of Major or Moderate) or Not Significant (i.e. those determined to have a significance rating of Minor or Negligible) as illustrated in Figure 32.3.

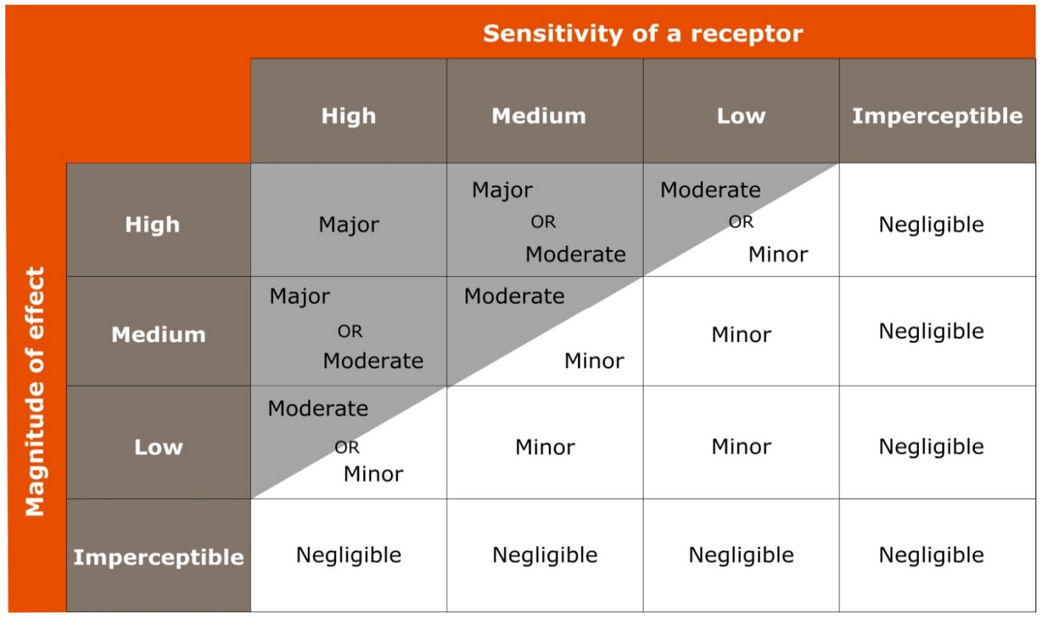

Figure 32.3 Impact Significance Matrix

32.40. Table 32.9 illustrates the types of impact related to a given significance.

Table 32.9 Definition of impact significance	
Magnitude	Criteria
Major	The value of the receptor and the magnitude of effects are predicted to give rise to fundamental change in activity. This would indicate: employment effects in the tourism sector and/or in the supply chain that cannot be readily absorbed within the existing workforce, or that would result in large scale reductions in business (including tourism receptors) performance.
Moderate	The value of the receptor and the magnitude of effects are predicted to give rise to impacts that are measureable but not likely to cause a fundamental change to the activity. This would include: an increase in demand which could be accommodated with planned improvements in the capacity of the labour market (e.g. increases in working age population, improved skills and training infrastructure); or a notable reduction in the scale or attractiveness of a tourism receptor to most of its users.
Minor	The value of the receptor and the magnitude of effects are predicted to give rise to impacts that are detectable, but alone are not likely to result in a change to the activity. This would indicate: employment effects in supply chain activity that can be readily absorbed by the existing workforce; and/or little anticipated change in business performance.
Negligible	The value of the socio-economic or tourism receptor is not predicted to give rise to impacts that would affect employment or business performance.

32.41. For the purposes of this assessment, impacts that are considered to have a major or major/moderate impact are considered to be 'Significant'; and for negligible and minor impacts the significance is considered as 'Not Significant'.

32.3.7. Limitations and embedded mitigation

Limitations

32.42. The limited availability of tourist and visitor information and data at sub-regional, local authority and lower levels of aggregations precludes detailed analysis of impacts at specific locations. In the absence of consistent data for different tourism receptors (for example reflecting year on year variations in patronage) pragmatic use has been made of different information sources. The business survey sought to fill other information gaps.

32.43. While approaches and invitations were extended to relevant local authorities in the study area to be involved in this assessment and provide relevant data in their possession take up has been inconsistent. Where such information has not been provided, the assessment has not taken account of reports that are not in the public domain.

Assumptions

32.44. The main supply chain assumptions are presented in the Offshore Socio-economics and Tourism assessment (Chapter 21).

However, those specifically related to the construction, operation and maintenance, and decommissioning of the onshore components are as follows:

- The Navitus Bay Supply Chain Analysis indicates that the majority of onshore cable and substation installation is likely to be undertaken by UK-based civil contractors.
- The onshore components may have the following direct employment implications:
    - Cable: route construction workforce of 222 in Years 2 and 3; installation workforce of 58 in Years 4 and 5. Construction activity would be limited to two thirds of the year.
    - Substation: workforce numbers range from 12 in the pre-construction to up to 60 during major installation. For the purpose of this assessment, it is assumed that 40 posts would be created over a two-year period.
- The extent to which employment and investment is additional requires consideration of deadweight (the extent to which the effects would have taken place without the Project); displacement (the degree to which the Project displaces existing economic activity); leakage (the proportion of jobs taken up by residents outside the study area); and multiplier effects (reflecting the impact of the direct, indirect and induced expenditure in wider economy). For this assessment, standard capital project additionality adjustments are made to reflect less specialist civil and electrical engineering characteristics of onshore connection infrastructure (compared to those of the offshore components). The assumptions used are: deadweight at 10.3%; displacement at 43.1%; leakage at 17.3%; multiplier effects at 1.46.
- This results in a combined net additional adjustment of 51.7%. These adjustments are taken from "Research to improve the assessment of additionality" (Department for Business Innovation and Skills, 2009).

32.45. Net additional onshore construction employment is estimated at 236 job years, equivalent to 24 jobs (based upon an average job tenure of circa. 10 years).

Embedded mitigation

32.46. In some instances, embedded mitigation is sufficient to prevent any significant impacts from occurring. The following measures are taken into consideration in relation to this assessment.

Onshore Cable Corridor

- While some minor roads may be temporarily obstructed, traffic management measures would be adopted to enable many to continue to be used.
- Trenchless crossing of major roads, railways and rivers would reduce obstruction to ensure access can be maintained for the duration of the works.
- Local communities would be informed of the closures/diversions through advertisements in the press and signs at the entry points. This would be communicated in accordance with a communications protocol to be submitted to and approved by the relevant local authority(ies) prior to commencement of constructing the onshore components.

- Where open cutting cable installation techniques are required the following measures would be adopted, either: existing gaps would be used to route the cable where possible, or routes adjacent to existing tracks in addition to a reduction of the working width for cable installation to reduce potential obstruction and loss of amenity; temporary structures used to bridge an open trench; create an access around the working width by a fenced route leading to a safe designated crossing point, or temporary route closure with alternative access arrangements for PRoW.
- Following construction there would be no planned obstructions.
- Decommissioning works would be restricted to cutting of cables and removal of above-ground structures.

Onshore Substation

- During the operation and maintenance phase, access to the substation and its perimeter would require infrequent visits for maintenance purposes.
- Screening and landscaping of some buildings (14m in height) and equipment (11m in height).

32.4. Baseline Environment

32.47. The following section details the baseline data gathering methodology for the assessment and data sources used.

32.4.1. Baseline data gathering methodology

Data sources

32.48. Studies have been undertaken to inform the baseline context, including the characteristics of tourist activity and associated businesses in the study area, as well as identifying the type of impacts of concern to visitors and tourism businesses.

32.49. The baseline data used to inform this assessment comprises data on: industry profiles; education and training (current attainment levels and future provision); economic activity; unemployment levels; tourism employment; tourism business density; tourism business impacts on turnover; the origin of tourism customer base; supply chain modelling and analysis and tourism business survey data.

32.50. The scope and methodology used to compile these technical reports are detailed in Table 32.10. The findings of these surveys have been used to inform the assessment of impacts (refer to the Impact Assessment section for details).

Table 32.10 Technical reports – scope and methodology

Technical report	Scope
Socio-economics and Tourism Baseline Technical Report	➢ This report identifies socio-economic and tourism baseline data collected using a desktop review of available and relevant sources. ➢ The research sought to identify the key characteristics of the area and the profile of visitors and visits.
Socio-economics, Tourism and Recreation Assessment – Local Strategy and Policy Review	A review of the local development plan documents (principally Core Strategies), local and regional economic development documents and the tourism and recreation and renewable energy strategies prepared by various bodies, in particular local authorities, has been undertaken. Where relevant these policies and strategies have informed the socio-economic and tourism baseline. The geographical area covered, insofar as it relates to the onshore components of the Project, include: ➢ the local authority areas potentially affected by the connection landfall and onshore infrastructure; ➢ areas where there is a focus of land based recreational activity that may be affected by the Project; ➢ strategies that cover a wider geographic area (e.g. the regional level), where appropriate.
Survey Report: Tourism Business Survey and Conference Facilities, Language Schools and Festivals and Events	The purpose of the Tourism Business Survey was to better understand the potential impacts of the Project on the local tourism business community, from the perspective of local tourism businesses themselves. For this assessment it considered all businesses that may derive all or part of their trade from tourism within 2km of

Table 32.10 Technical reports – scope and methodology	
Organisers' Surveys	the cable corridor and/or 3km of the substation. The rationale for the study area is described above. ➢ Businesses were identified through several channels. A database of tourism businesses was purchased from Experian. This was validated through desktop research (including internet searches and review of tourist brochures and guidebooks). Businesses not captured in the purchased database were added to the Business Survey population. To identify any other relevant businesses, the amended business population was distributed to tourism officers in the relevant local authorities in July 2012. ➢ Each business was contacted and those who responded were questioned over the telephone or via an online survey questionnaire, to understand their existing business context and the potential impacts they envisaged the Project would have on their business.
Navitus Bay Wind Park – Supply Chain Analysis	The purpose of the analysis was to understand the supply chain implications of the Project at national and local levels. The analysis used information in the public domain, input from the developer, knowledge and experience of the consultant team gained from working on other projects. In addition, meetings were held with potential local suppliers to identify assumptions in terms of the lifetime costs of the Project, the level of employment likely to be generated, the programme for each phase of the Project and the capacity of local businesses to meet these requirements.

32.51. This assessment has been informed by comprehensive analysis of publicly available data and documentation related to the study areas, such as data from the Office of National Statistics, government departments and tourism sources (for example VisitBritain, VisitEngland etc.). Additionally, local and regional strategies in relation to economic development, tourism and renewable energy have been reviewed and relevant content has been used to inform this assessment.

32.52. This assessment has also been informed by the surveys carried out to inform the baseline and impact assessment, as outlined in this methodology.

32.53. The following assessments have been used to inform this assessment:

- Air Quality - due to the potential for dust and other emissions during each phase of the Project, which could cause disturbance to socio-economics and tourism receptors;
- Noise and Vibration - due to the potential for noise disturbance during each phase of the Project, which could cause disturbance to socio-economics and tourism receptors;
- Landscape and Visual - due to potential visual impacts from the construction or decommissioning of equipment and built structures, or during the operation and maintenance phase when maintaining equipment;
- Traffic and Transportation - due to the increase in vehicular movements and potential closures to roads/blockages to access, primarily during construction and decommissioning;
- Recreation - in relation to potential impacts upon leisure activities that act as tourist attractions to the study area.

Methodology

32.54. A desktop analysis of available data was undertaken to establish the socio-economic and tourism baseline. Much of this data is of regional or county level, which is generally far broader than the onshore socio-economic and tourism study areas.

32.55. The Tourism Business Survey was completed in March/April 2013. Businesses in the onshore tourism study area were interviewed to establish their views regarding the potential impacts of the onshore components of the Project. For this element, a total of 52 businesses were identified and contacted. Of these 22 responded. Refer to the Baseline Environment section for details.

32.4.2. Issues scoped out

32.56. No issues have been scoped out at this stage.

32.4.3. Impact assessment methodology

32.57. This assessment accords with the EIA Methodology being adopted for the Project (refer to Chapter 3 for details). Applying this approach to the socio-economic impact assessment, the receptor sensitivity and magnitude of effect criteria are detailed in Tables 32.6 and 32.7. Tourism is assessed using separate criteria from the other socio-economic effects to reflect the different factors affecting tourism; in particular the role of an area's image and status (including designated areas) as a driver for economic activity, which is different from the more direct influence of the supply chain.

Socio-economic context

32.58. The socio-economic study area for the onshore components of the Project is defined as the 60-minute drive-time area from the substation (see Figure 32.1). Where possible, baseline data is provided at the county or unitary authority and drive-time level.

Population and skills

32.59. The proportion of the population achieving the highest level of educational attainment (i.e. HND, Degree and Higher Degree level qualifications) within the 60-minute drive-time catchment is notably higher than the GB average (27.5% compared to 26.8%). The proportion of people holding Level 3 qualifications and involved with apprenticeship programmes is, however, considerably lower than the GB average (Table 32.11).

32.60. The proportion of highly skilled and skilled workers in the 60-minute drive-time area is higher than the GB average (Table 32.12).

Table 32.11 Educational attainment – Bournemouth and Hampshire

Level	60 minute drive time	GB average
Education % Level 4 (Degree or higher)	27.5	26.8
Education % Level 3 (HND, HNC, RSA Higher Diploma)	13.7	32.3
Apprenticeship	4.5	13.0

Table 32.12 Skills in the workforce – Bournemouth, Dorset and Hampshire

Level	60 minute drive time	GB average
% highly skilled (jobs: high/intermediate managerial/admin/professional)	24.3	22.7
% skilled managerial (jobs: supervisory/clerical/junior managerial/admin/professional)	32.2	30.8
% skilled manual jobs (jobs: skilled manual jobs)	21.7	20.8
% unskilled	21.7	25.7

Economic overview

32.61. Table 32.13 identifies the number of people economically active and inactive in each of the drive-time areas.

Table 32.13 Economically active and inactive by drive time area

Group	60 minute drive time	GB total
All people	1,737,656	60,837,196
Economically active	851,783	29,815,408
Economically active - unemployed	35,726	2,015,110

32.62. Hampshire and Dorset have similar/higher levels of employment in manufacturing (10.2% and 11.9% respectively) and construction (5% and 5.3% respectively) compared to the GB average (10.2% and 4.8%). By contrast, Bournemouth's economy is much more strongly related to service industries and tourism. Therefore the proportion of people involved in the manufacturing and construction sectors are lower than the GB average, at 3.2% for both sectors.

32.63. Table 32.14 details the proportion of people employed within the manufacturing and construction sectors within the 30, 45 and 60 minute drive-time of the substation.

Table 32.14 Employment in manufacturing and construction by drive time area		
Group	60 minute drive time	GB total
All people aged 16-74 in employment	778,642	26,582,634
Manufacturing	9.7%	9.8%
Construction	5.7%	5.6%

32.64. Therefore, there is an economically active, skilled and semi-skilled workforce in Bournemouth, Dorset and Hampshire which has the capacity to form a labour market resource (some of whom may require retraining) to support the Project's onshore components.

32.65. There are courses available in the study area that can help facilitate the training of people within the renewables sector. Compared to the offshore components, the nature of skills required to support construction of the onshore components of the Project are such that there would be greater capacity in the workforce to take advantage of the opportunities arising from the construction phase. Bournemouth and Poole College offers construction courses. There are also other providers in the area (such as Eastleigh College, A Plus Safety & Training Services in Bournemouth and Poole, Highbury College in Portsmouth and City College, Southampton). Bournemouth University also provides a variety of engineering degree courses as well as a HNC in Electrical Technology. Additionally, Southampton University and Portsmouth University provide a range of undergraduate and postgraduate courses in relevant engineering fields.

32.66. The baseline shows Bournemouth, Dorset and Hampshire have a construction and manufacturing base with the potential to deliver construction and electrical engineering products and services. Notwithstanding, businesses across the UK would have the potential to compete for work.

Tourism Baseline

32.67. There are approximately 3.5 million staying trips each year by UK residents to the districts and unitary authorities within the study area. These staying trips generate £637 million of visitor spend. Of these trips, around 1 million per year are staying in Bournemouth, 0.4 million in Poole, 0.2 million in Christchurch and East Dorset and 0.6 million in New Forest District.

32.68. Table 32.15 identifies the number of domestic visits, the average number of nights of those domestic visits and the average annual spend by those visitors for the areas of Hampshire, Dorset and Bournemouth, compared to those of the study area, and the South West and South East regions.

Table 32.15 Number of domestic trips, nights and spend 2009-2011			
Area	Average annual		
	Trips (000s)	Nights (000s)	Spend (£m)
Hampshire	3,522	10,036	457
Dorset	3,208	11,298	563
Bournemouth	965	2,858	173
Study Area	*3,508*	*13,042*	*637*
South West	19,608	74,254	3,730
South East	17,363	48,674	2,451

Source: GBTS Analysis 2007-2011 (VisitEngland, 2011)

Hampshire

32.69. Hampshire makes up approximately 20% of the South East region's domestic tourism and value. As with Dorset, the area's performance has remained relatively consistent, with small percentage decreases recorded in average trips, nights and spend between the reporting periods of 2007-09 and 2009-11.

32.70. The New Forest is within Hampshire and is strongly associated with the New Forest National Park. Key attractions of the National Park include: the Beaulieu National Motor Museum; parks and gardens, such as Exbury Gardens; historic buildings, such as Beaulieu Abbey and wildlife and nature, such as the Liberty's Owl Raptor and Reptile Centre and The New Forest Wildlife Park.

32.71. On the southern edge of the New Forest District there are a number of small seaside villages, such as Barton on Sea and Milford on Sea, which offer views across to the Isle of Wight.

Dorset

32.72. Dorset has a strong coastal visitor appeal; visiting the beaches and staying with friends and relatives are the main visitor incentives for domestic and overseas tourists respectively. Events such as the Bournemouth Air Show, Poole Quay fireworks and Coles Miller Dream Machine also support levels of tourism activity. Purbeck includes the eastern end of the Jurassic Coast World Heritage Site as well as high profile coastal locations such as Old Harry Rocks and Durdle Door. One of the major attractions in Dorset is Moors Valley Country Park, which lies close to the proposed substation at Three Legged Cross.

32.73. Dorset accounts for just over 16% of the South West of England region's domestic tourism and value. Within Dorset, Bournemouth is the most visited destination for both staying and day trips, followed by Poole, East Dorset and Christchurch.

32.74. Across Dorset, in 2008 there were an estimated 38,000 language study trips, with an average length of stay of 36 nights. These trips account for 35% of overseas tourism trips to the wider Dorset area (higher than the 1% average of overseas staying trips across the UK) and 1% of all staying trips. While the volume of language school trips is low compared to the overall levels of tourism, the long average length of stay (36 nights) increases its importance.

32.75. Domestic tourism in Dorset has remained generally stable, albeit there have been small reductions in average annual trips (-2%), nights (-4%) and spend (-2%) between the 2007 to 2009 and 2009 to 2011 periods.

Bournemouth

32.76. There are an estimated 664 tourism-related businesses in Bournemouth, of which 45% are either restaurants or cafes and more than 20% are hotels or similar accommodation providers. There are also a number of pubs and bars, as well as a variety of businesses which provide sporting activities, such as sailing and leisure centres. Other activities include paintballing and ten-pin bowling.

32.77. Bournemouth is the most popular destination in Dorset for domestic tourism, with 30% of Dorset's annual trips and spend coming from the seaside town. Despite its popularity, between the reporting periods of 2007-09 and 2009-11, Bournemouth has seen a fall in its number of trips (-2%) and nights (-4%).

32.78. In terms of domestic visitors, over half (57%) of domestic visitors are from the immediate South East and South West area. London and the West Midlands account for 9% and 8% respectively. Visitors from Wales, Scotland and Northern Ireland only account for 6% of all domestic visits. In terms of overseas visitors, those from Germany and Holland make up the largest share of the area's overseas visitors market (19% and 18% respectively). Ireland also accounts for a notable share (9%).

32.79. In terms of the main reasons for visiting the area, 20% of domestic and 10% of overseas visitors wanted to return following a previous visit, 19% of domestic and 35% of overseas visitors were visiting friends or relatives. Other reasons cited included: a wish to visit somewhere not been before; the seaside, beach and coast; the scenery and countryside; recommended by friends; local visitor attractions, and ease of access.

32.80. Conferences and language schools are identified as important subsections of Bournemouth's tourism industry. In terms of conferences, it is estimated that these account for up to 0.4 million trips (although other estimates suggest a lower figure). The conference market includes the purpose-built Bournemouth International Centre, which hosts major national conferences, including political parties and national associations In addition there are a number of other, smaller venues capable of accommodating meetings of different sizes including hotels and other locations across the wider study area. In terms of language schools, 29 language schools were identified as part of the research, most of which were in Bournemouth.

32.4.4. Businesses in the vicinity of the onshore components of the Project

32.81. Baseline work was undertaken to establish the tourism business population in the vicinity of the onshore cable route and substation. It identified 52 tourism facilities and businesses, including serviced and non-serviced accommodation, visitor attractions, car parks serving the coast/countryside and pubs.

32.82. The wider area, outside the study area, includes a greater number of businesses in the resorts of Milford on Sea, Barton on Sea and Highcliffe, as well as some tourism businesses and facilities along the course of the cable route and close to the A31 near the substation. The cable crosses the Avon Valley Path and runs through Hurn Forest and West Moors. Moors Valley Country Park is in the study area. It is estimated to attract over 832,000 visitors per year, making it the most visited facility in the local and wider study area.

32.83. Of the 52 tourism businesses identified and contacted, 22 businesses responded to the survey. Of these, six stated they felt that the Onshore Cable Corridor would have a negative impact on their businesses, although two stated that they felt any impact would be temporary. Three respondents quantified that they felt these loss in business would equate to a 10%, 20% and 30% reduction in business respectively.

32.84. Some respondents felt that the countryside would be affected, with one respondent stating that the cable would put a 'scar' on the landscape and that the Hurn Forest would be effectively 'sterilised' so that no trees can be planted on it in the future. Others had concerns that construction traffic would cause delays in the roads and put tourists off from coming to the area.

32.85. The findings of the survey also indicated that businesses are subject to a variety of influences, some of which were wider factors outside individual businesses' control (e.g. the recession, petrol prices and the trend towards "staycation") and others related to the context of the business and the way it is run (e.g. the area's reputation and neighbouring facilities, business factors to include price/value, marketing and the product offered).

Tourism employment

32.86. The average proportion of tourism related jobs within local and unitary authorities which intersect the cable corridor boundary are above the GB average (refer to Table 32.16).

Table 32.16 Tourism employment

Area	Percentage Employment
Bournemouth	12.0
Dorset	10.2
Hampshire	7.7
Study area average	10.0
GB average	8.2

32.5. Impact Assessment

32.5.1. Assessment parameters

32.87. Parameters have been used to define the 'Rochdale Envelope' used to describe the potential realistic worst case scenarios for each potential effect on socio-economics and tourism receptors. Refer to Table 32.17 and 32.18 for details.

Table 32.17 Assessment parameters relevant to the socio-economic impact assessment

Potential effect	Realistic worst case scenario	Rationale
Construction		
Effects on manufacturing and construction labour force and employment	3 cables to be installed	Requires the least amount of manpower/ancillary equipment and time to install. Therefore there would be less take up of labour force and goods/ service supply.
	Cable length is 1200 m for 100% of the cable route	Results in the least amount of jointing bays and uses less manpower/ancillary equipment and time to install. Therefore there would be less take up of labour force and goods/service supply.

Table 32.17 Assessment parameters relevant to the socio-economic impact assessment		
	Least amount of ancillary systems, e.g. sustainable drainage systems	Requires the least amount of manpower/ancillary equipment and time to install. Therefore there would be less take up of labour force and goods/ service supply.
	HDD operations take shortest time at the landfall	Manpower and ancillary equipment are in use for the shortest time. Therefore there would be the least amount of input into the labour market.
Operation and Maintenance		
Effects on manufacturing and operation and maintenance labour force and employment	Minimum programmed number of maintenance trips to the substation	Requires the least amount of manpower/ancillary equipment, therefore there will be less take up of labour force and goods/service supply.
Decommissioning		
Effects on manufacturing and decommissioning labour force and employment	3 cables to be installed	Requires the least amount of cutting at decommissioning, therefore requires fewer personnel or ancillary equipment and time to decommission; hence, there would be less take up of labour force and goods/service supply.

Table 32.17 Assessment parameters relevant to the socio-economic impact assessment		
	Cable length is 1200 m for 100% of the cable route	Requires the least amount of removal and in-fill at jointing bays (as number of jointing bays are minimised) at decommissioning, therefore requires fewer personnel or ancillary equipment and time to decommission; hence, there would be less take up of labour force and goods/service supply.

Table 32.18 Assessment parameters Relevant to the Tourism Impact Assessment		
Potential effect	Realistic worst case scenario	Rationale
Construction		
Obstruction of access to tourism related businesses. Disturbance (noise, air quality, visual.) to tourism related customer	6 cables of maximum (275 kV) capacity to be installed	Requires the greatest amount of manpower/ancillary equipment and time to install. Therefore there would be a greater level of obstruction (as cable corridor width would be greater), disturbance levels in terms of volume and duration. These factors would then lead to the worst case effect upon the tourism economy of the study area.

Table 32.18 Assessment parameters Relevant to the Tourism Impact Assessment		
base. Depression of the tourism economy from reduced use of tourism-related businesses and tourist attractions in the study area.	Cable length is 700 m for 100% of the cable route	Results in the greatest amount of jointing bays to be installed. Consequently this would cause the greatest use of manpower/ancillary equipment and therefore would cause the greatest disturbance in terms of volume and duration. Also causes the greatest level of obstruction to access along the cable route. These factors then lead to the worst case effect upon the tourism economy of the study area.
	Greatest amount of ancillary systems, e.g. sustainable drainage systems	Requires the greatest amount of manpower/ancillary equipment and time to install. Therefore there would be greater potential obstruction to access (volume of area affected and duration). This also leads to the greatest level of disturbance from additional installation of supporting works and ultimately, the greatest effect upon the overall tourism economy of the study area.
	Open cutting is used for all minor roads	Leads to the greatest level of obstruction to access; roads would remain open where this is possible, but traffic management systems (e.g. use of temporary traffic lights, diversions) may lead to delays. Results in greatest level of disturbance. Ultimately would cause the greatest level of effect upon the tourism economy in the study area.

Table 32.18 Assessment parameters Relevant to the Tourism Impact Assessment		
	HDD operations take longest time at the landfall	Duration of obstruction and disturbance effects are maximised causing the greatest effect upon tourism economy in the study area.
	Maximum size of site equipment used at the landfall: ○ Drill rig – 250 tonnes ○ Control cabin – 6 tonnes ○ Power pack – 10 tonnes ○ Hiab flat container – 8 tonnes ○ 2 x bentonite mud pumps – 14 tonnes each ○ Storage container – 6 tonnes ○ Mud recycling unit – 22 tonnes	The largest equipment would lead to the greatest area to cause an obstruction to access and the greatest level of disturbance (primarily visual). Ultimately it would lead to the greatest level of effect upon the tourism economy.
O&M		
Disturbance (noise, air quality, visual.) to tourism related customer	Substation is maximum height of 14 m	This would lead to greatest visual disturbance in relation to tourism related businesses and ultimately the overall effect on the tourism economy in the study area.

Table 32.18 Assessment parameters Relevant to the Tourism Impact Assessment		
base. Depression of the tourism economy from reduced use of tourism-related businesses and tourist attractions in the study area.	Maximum number of programmed maintenance trips to the substation	Greatest level of disturbance to the study area from visits to site and presence of maintenance workers/vehicles/equipment. Ultimately this would cause the greatest effect upon the tourism economy in the study area.
	Maximum number of abnormal load deliveries (4) for high voltage transformers	Greatest level of obstruction to access and disturbance to the study area from use of heavy vehicles. Ultimately this would cause the greatest effect upon the tourism economy in the study area.
Decommissioning		
Obstruction of access to tourism related businesses. Disturbance (noise, air quality, visual) to tourism related customer	6 cables to be installed	Requires the greatest amount of cutting at decommissioning, therefore requires the greatest amount of personnel or ancillary equipment and leads to the longest duration. Consequently this would result in the greatest level of disturbance and obstruction to access and ultimately causes the greatest effect upon the tourism economy of the study area.
base. Depression of the tourism economy from reduced use of tourism-related businesses and tourist attractions in the study area.	Cable length is 700 m for 100% of the cable route	Requires the greatest amount of removal and in-fill at jointing bays (as number of jointing bays are maximised) at decommissioning. Therefore this requires a greater volume of personnel or ancillary equipment and would lead to a longer duration. Consequently this would result in the greatest level of disturbance and obstruction to access and ultimately causes the greatest effect upon the tourism economy of the study area.

32.5.2. Impact assessment

32.88. This section contains an impact assessment on the labour market based upon the results of the supply chain analysis in relation to the onshore components of the Project and the relevant baseline data. This assessment excludes the combined onshore and offshore supply chain analysis, including supply of materials and components, which is presented in the Offshore Socio-economics and Tourism assessment (Chapter 21).

Impact upon the study area labour market through additional manufacturing and construction activity and employment

Construction

32.89. The supply chain analysis undertaken indicates that impacts on potential construction employment would only be constrained by labour market availability under the high scenario. This would be most apparent in Portland and Yarmouth, where the potential impacts represent 78% and 39% respectively of the potentially available labour pool. The combined analysis considered that the substantial manufacturing and construction base in Southampton, Portsmouth and Poole means that the employment needed for the Project is a relatively small part of the total employment in these sectors, increasing the likelihood that the Project would be part of ongoing

workstreams rather than stifling other economic activity. However, this data has limited application to the onshore study area in relation to the Onshore Cable Corridor and Onshore Substation. Therefore a number of other indicators have been used to inform the impact assessment upon the labour market in relation to the onshore components of the Project.

32.90. The data presented in the baseline provides information in relation to the capacity of the drive-time areas to absorb economic opportunities. The comparison uses the gross and net onshore construction peak employment assumptions, i.e. 220 jobs during cable construction, 58 jobs during installation and an average of 40 posts involved in construction of the substation. This is examined against the drive time catchments centred on the location of the substation.

32.91. The conclusion drawn from this component of the analysis is that the construction of the onshore components of the Project would not result in adverse workforce employment impacts. The number of net additional jobs per annum is less than 1% of the total construction workforce within a 30 minute drive time and around 1% of the potentially available labour pool. This would not result in any local constraints, as there is a readily available labour force.

32.92. It is noted that the potential pool of construction labour often has a low skilled profile and currently may not possess the capacity to benefit from opportunities provided by the cable route and substation construction. However, with a programme of re-skilling and/or re-training, the workforce may be in a position to offer the necessary skills and attributes appropriate to Project requirements. The effects of this in respect of the provision of new, skilled employees with construction and/or electrical engineering skills are likely to be slight but beneficial.

32.93. The socio-economic study area has a marginally lower proportion of manufacturing jobs (9.7% compared to 9.8% GB average) but a slightly larger proportion on construction jobs (5.7% compared to 5.6% GB average). The study area labour market also exhibits a notably lower proportion of available labour (4.2% compared to 6.8% GB average).

32.94. The proportion of highly skilled and skilled workers in the 60-minute drive-time area is higher than the GB average. The proportion of the population achieving the highest level of educational attainment (i.e. HND, Degree and Higher Degree level qualifications) within the 60-minute drive-time catchment is notably higher than the GB average (27.5% compared to 26.8%). The proportion of people holding Level 3 qualifications and involved with apprenticeship programmes is, however, considerable lower than the GB average. Therefore the sensitivity of the workforce is considered to be **low**.

32.95. While there may be a requirement for up to 222 workers at peak construction, the number of net additional construction jobs created by the onshore element is estimated to be 24FTEs. While the duration of onshore construction is projected to be 4 years, the level of employment would vary according to the activity required.

32.96. To address the variance between the two indicators in relation to magnitude of effect according to the criteria outlined in Table 32.7, a conservative approach has been taken in view of the fact that the effect is beneficial. Therefore, magnitude of effect is considered to be **low**.

32.97. Likelihood is considered to be probable as the works require a certain number of personnel/suppliers in order to be carried out, and this labour is readily available in the area. Therefore no adjustment of the impact is required.

32.98. The level of impact is considered to be **minor** and beneficial. The level of significance is **Not Significant**.

Operation and Maintenance

32.99. The sensitivity of the labour market, based on current data, is determined to be **low**.

32.100. The number of jobs created during the operational and maintenance phase is likely to be less than during the construction and (potentially) decommissioning phases. The cable route would be subject to some tests throughout the life of the Project but would not require planned maintenance. There are no specific employment estimates for undertaking the cable testing and it has been assumed that the employment effects of the cable operation would be minimal. Furthermore, the substation is likely to be unmanned during the operation and maintenance phase, requiring infrequent visits for routine inspection and maintenance procedures. There are also no specific employment estimates for undertaking the substation inspection and maintenance; it has therefore been assumed that job creation would be minimal. Based upon this information, it is considered that

a beneficial magnitude of effect would be **imperceptible**. However, to address the discrepancy between these two indicators in relation to magnitude of effect, as for construction, a conservative approach has been taken in view of the fact that the effect is beneficial. Therefore, magnitude of effect in this instance is considered to be **low**.

32.101. The level of impact is considered to be **minor** and beneficial. The level of significance is **Not Significant**.

Decommissioning

32.102. The sensitivity of receptor is considered to be **low** as for the construction and operation and maintenance phases.

32.103. Magnitude of effect is considered to be comparable to the construction phase due to the similarity of works, albeit the works would be of a notably smaller scale as cables are to be cut and remain in situ and only the above ground works would be decommissioned and removed. Therefore, in relation to potential job creation, it is considered that a medium rating is appropriate. No staffing estimates are available for decommissioning, although clearly there would be some employment impacts and these would be beneficial.

It is unlikely that any such impacts would be subject to any labour market constraints, particularly as there is the opportunity to arrange the work some time in advance of the actual decommissioning activities taking place.

32.104. Duration is also considered to be comparable to the construction phase. Therefore this would indicate a magnitude of effect rating of **low**. To address the discrepancy between these two indicators in relation to magnitude of effect, as for construction, operation and maintenance, a conservative approach has been taken in view of the fact that the effect is beneficial. Therefore magnitude of effect is considered to be **low**.

32.105. The level of impact is considered to be **minor** and beneficial. The level of significance is **Not Significant**.

Obstruction to access of tourism-related businesses

Construction

32.106. The sensitivity of tourism businesses is derived from the percentage of customer base which is drawn from outside of the regional area (taken from the tourism businesses surveyed within the onshore study area) and also current business performance of these same businesses.

32.107. 50% of the customer base was reported by businesses within the study area to be drawn from outside the region (i.e. from overseas or from the UK outside of the South West and South East region boundaries), which would indicate a high sensitivity based upon the criteria provided in Table 32.8. 34% of the customer base comes from the South West and South East regions. However, it is not possible to make a determination as to how much of this is trade from residents who live close to the study area or further afield (but within the South East or South West regions).

32.108. The other criteria for establishing sensitivity is the current level of performance, as businesses with a better level of current performance are considered to have a greater tolerance to change. Within the study area, there was a 50% response rate to this question during the tourism business survey. Approximately 64% indicated that current performance was good; approximately 27% stated that current performance was fair; and approximately 9% reported a current performance of poor. This would indicate a sensitivity rating of **low**.

32.109. Given that the two indicators used to determine sensitivity have resulted in a high and medium rating, and that there is equal weighting assigned to both criteria, the overall sensitivity of the receptor here is considered to be **medium**.

32.110. In respect of magnitude of effect, 28% of tourism businesses who responded to the survey reported that the onshore components of the Project would have an adverse impact of some degree on their business. Of these, 50% provided a quantifiable answer in relation to percentage impact upon turnover. On average, these respondents predicted a reduction in turnover of 18.3%, which represents a high adverse impact (i.e. greater than 15% effect on turnover). Direct obstruction to property access and increased traffic (which could represent and obstruction to access) were raised as concerns by respondents. However, when considering all respondents (including those who reported impacts and those who did not) the magnitude of effect is considered to be **low**.

32.111. In relation to access concerns, the cabling activity affecting access and tourism business operational routes would be undertaken for a given section

for a few months. The substation works would be completed in a construction site where access to businesses is not likely to be affected. The works at the landfall would have a greater duration, however the horizontal directional drilling (HDD) works would minimise obstruction to access as no trenching is required. Considering the overall duration of construction against the temporary nature of works, this also indicates a magnitude of effect of **low**.

32.112. Both criteria used to make this determination provide the same rating, therefore the magnitude of effect is considered to be **low**.

32.113. The receptor sensitivity and magnitude of effect ratings is considered to provide an adverse impact of **minor**. The level of significance is **Not Significant**.

Decommissioning

32.114. Obstruction during the decommissioning phase would be minimal in comparison to the construction phase, given that the cables would remain in situ or in some instances being cut. Obstruction to access is therefore likely to arise predominantly at the locations of the jointing pits where it is intended they would be in-filled and at locations around the substation.

32.115. In relation to the sensitivity criteria, this is likely to be comparable to the construction phase in relation to customer base and business performance. Therefore sensitivity is considered to be **medium**.

32.116. Magnitude of effect criteria is also considered to be comparable with construction. Therefore magnitude of effect is considered to be **low**.

32.117. The receptor sensitivity and magnitude of effect ratings is considered to provide an overall adverse impact of **minor**. The level of significance is **Not Significant**.

Disturbance to tourism businesses

Construction

32.118. The receptor sensitivity and magnitude of effect ratings of tourism businesses are considered to be the same in relation to disturbance to tourism businesses and consequent decrease in custom caused by effects such as construction noise and vibration, air quality and visual impact, as they are based upon the same criteria as for obstruction to access.

32.119. The sensitivity of the receptor is therefore considered to be **medium** and the magnitude of effect is considered to be **low**. This gives an initial adverse impact **minor**.

32.120. Reasons given by those businesses who responded to the tourism business survey who predicted an adverse impact of some kind due to onshore construction, related solely to landscape and visual concerns; specifically, the ground disturbance and associated potential visual impact of that and the potential removal of trees in forested areas during cabling activity. No concerns were expressed regarding the substation in relation to disturbance.

32.121. Noise and vibration, air quality and landscape and visual disturbance types have been considered here as they are all potential impacts arising from the construction of the onshore works (despite not all being raised by tourism business survey respondents), which may have a subsequent impact upon users of tourism related businesses and therefore on the businesses themselves. The noise and vibration impact assessment for the construction phase has identified that there would be no significant impacts on receptors arising from the onshore components of the Project (i.e. originating from construction noise, construction vibration, and construction vehicle noise). The air quality assessment has identified that there would be no significant impact on receptors within 20 m, or between 50 m and 100 m of the works. The landscape and visual assessment has identified that there would be impacts on some viewpoints, however some of these were effects on residences. The impacts upon customers of a business are likely to be far more temporary. Impacts on other viewpoints were considered to be **Not Significant**.

32.122. Therefore, in relation to the probability of disturbance effects, following consideration of the findings of other assessments and the responses provided by those businesses predicting an adverse impact during the tourism business survey, likelihood is considered to be **low**. Therefore the overall impact is reduced.

32.123. The impact is considered to be **negligible**. The level of significance is **Not Significant**.

Operation and Maintenance

32.124. The receptor sensitivity rating of tourism businesses is considered to be the same in relation to disturbance to tourism businesses during the operation

and maintenance phase, as for the construction phase, as the indicators remain the same (customer base and business performance). Therefore the sensitivity is considered to be **medium**.

32.125. In respect of the magnitude of effect, an adverse impact was only predicted by one respondent to the tourism business survey in relation to the effects of the onshore components of the Project. In addition, disturbance factors are considered to be reduced during operation and maintenance; the air quality assessment scoped out the operation and maintenance phase. Visual impacts during operation and maintenance are reported to be not significant for all but one residential receptor. Following mitigation measures, the operational noise impacts of the substation were reduced to a rating of **Not Significant**. Therefore in terms of impact on business, a magnitude of effect rating of **imperceptible** is appropriate.

32.126. The impact is considered to be negligible. The level of significance is **Not Significant**.

Decommissioning

32.127. The potential for disturbance to tourism businesses, and consequent decrease in custom caused by effects, are considered to be similar during the decommissioning phase as for construction. However, the magnitude of effect would be minimised given the far smaller scale of work to be undertaken and the lesser level of ground disturbance.

32.128. The sensitivity of the receptor is therefore considered to be **medium** and the magnitude of effect is considered to be **low**. This gives an initial adverse impact of **minor**.

32.129. No predictions were made in relation to potential impacts in the study area during the decommissioning phase by respondents of the tourism business survey. In other assessments, there were no significant impacts in relation to air quality or noise and vibration. In relation to visual impacts, the landscape and visual assessment found one residential viewpoint to be significantly impacted, whilst the remainder of impacts on viewpoints were found to be **Not Significant**.

32.130. Therefore, in relation to the probability of disturbance effects, following consideration of the findings of other assessments and the lack of response provided by tourism related businesses in relation to the decommissioning phase, likelihood is considered to be **low**. Therefore the overall impact is reduced.

32.131. The impact is considered to be **negligible**. The level of significance is **Not Significant**.

Overall impact upon tourism economy

Construction

32.132. The tourism economy is an important part of the study area's economy, even though this varies within the area. In comparison to the coastal businesses included within the study area for the assessment of the offshore components of the Project, inland locations along within the onshore study area have lower concentrations of tourism businesses, especially given the far smaller study area used for this assessment.

32.133. Tourism data is not available at the same scale as the study area. Therefore, tourism data used for this assessment is taken from local authorities' data which overlaps with the study area.

32.134. The criteria used to determine the sensitivity of the tourism economy of the study area is based upon tourism employment. Data is sourced from the Annual Business Inquiry data for Hampshire, Bournemouth and Dorset as the local authority areas within which the study area lies. A comparison is then made against the national average of workers engaged in tourism-related employment (8.2%) in order to understand the study area's overall comparative level of tourism employment.The figures shown in Table 32.16 show the relatively high percentage of tourism workers in Bournemouth and Dorset (which would be in the first quartile of local authorities) and the lower proportion of tourism workers across Hampshire as whole (which is in the 2nd quartile). The sensitivity of the tourism economy in the study area is therefore determined to be **medium**.

32.135. Magnitude of effect is considered to be **low** reflecting the low number of tourism businesses in the vicinity of the Onshore Cable Corridor, the low proportion reporting anticipated impacts and the embedded mitigation measures.

32.136. The impact is considered to be **minor**, and the level of significance is **Not Significant**.

Operation and Maintenance

32.137. In relation to sensitivity of receptor, this is considered to be the same as for the construction phase based upon current data in relation to tourism employment in the area. Given that the operation and maintenance phase would occur in the future, there are likely to be fluctuations. The sensitivity of the tourism economy within the study area is therefore determined to be **medium**.

32.138. The magnitude of effect is considered to be **low**, reflecting the low number of tourism businesses in the vicinity of the cable route, the low proportion reporting anticipated impacts and the embedded mitigation measures.

32.139. The impact is considered to be **negligible**, and the level of significance is **Not Significant**.

Decommissioning

32.140. In relation to the sensitivity of the receptor, this is considered to be the same as for the construction phase based upon current data in relation to tourism employment in the area. The sensitivity of the tourism economy within the study area is therefore determined to be **medium**.

32.141. The magnitude of effect is considered to be **low**, reflecting the low number of tourism businesses in the vicinity of the Onshore Cable Corridor, the low proportion reporting anticipated impacts and the embedded mitigation measures.

32.142. The impact is therefore considered to be **minor**, and the level of significance is **Not Significant**.

32.6. Potential Mitigation

32.143. Mitigation measures are being identified in discussion with relevant statutory consultees, which will seek to minimise predicted impacts.

32.144. No impacts have been identified for which mitigation is proposed. Notwithstanding, the following measures would be adopted by NBDL to ensure that benefits to the supply chain surrounding areas are maximised as much as possible:

- Labour market in the onshore study area: To ensure opportunities for the local supply chain are maximised at each phase of the Project, NBDL will develop a strategy with the local authorities to achieve this, which will seek to:
  - maximise the opportunity for local businesses to bid for contracts;
  - maximise local employment opportunities;
  - assess local training needs and delivery mechanisms.
- Tourism businesses and facilities in the onshore study area: Where any closures and/or diversions are required to local roads or public rights of way (PRoW), these would be agreed with the relevant highway authority or PRoW officers prior to commencement of the relevant works.

32.145. Once any closure and/or diversion has been agreed with the relevant highway authority or PRoW officer, this would be communicated locally in accordance with a communications protocol to be submitted to and approved by, the relevant local authority(ies) prior to commencement of constructing the onshore components of the Project.

32.146. As context, the following measures are proposed in relation to the offshore components of the Project, which have the benefit of supporting tourism in the wider area:

- A commitment to funds being made available to local authorities to deliver measures which would promote local tourism, which could include: a visitor centre, marketing of specific areas or sectors.
- Establishment of a communications protocol to disseminate information to relevant stakeholders during the construction and decommissioning phases of the Project.

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Glossary

TERM	DEFINITION
Deadweight	Expenditure to promote a desired activity that would have in fact occurred without the expenditure (HM Treasury Green Book and the Department for Business Innovation & Skills Impact Assessment Toolkit(April 2010))
Economic Activity Rates	The economic activity rate measures the percentage of the population who are in employment or unemployed. The economic activity rate is therefore a useful measure of the labour market opportunities available to the people. A high proportion of economically active unemployed people represents and underutilised workforce that could contribute to the area's economic performance
Gross Value Added (GVA)	GVA consists of earnings, profit and investment in the area of benefit and is a standard economic measure of the value in £s of the goods and services produced in an area.
Job Density	Job density measures the number of jobs (per resident aged 16-64) for every resident (also aged 16-64).
Tourism related employment	Tourism-related includes the following sectors: SIC 551 Hotels; SIC 552 ; camping sites etc.; SIC 553 Restaurants; SIC 554 Bars; SIC 633 Activities of travel agencies etc.; SIC 925 Library, archives, museums etc.; SIC 926 Sporting activities; SIC 927 Other recreational activities

Abbreviations

TERM	DEFINITION
EIA	Environmental Impact Assessment
EN-1	NPS for Energy
EN-3	NPS for Renewable Energy Infrastructure
EN-5	NPS for Electricity Network Infrastructure
ES	Environmental Statement
FTE	Full time equivalent – as applied to jobs. Used as a measure to combine full and part time/casual employment
GVA	Gross value added – a true measure of the value to an economy
HDD	Horizontal Directional Drilling
HND	Higher National Diploma
NBDL	Navitus Bay Developments Ltd
NCN	National Cycle Network
NPPF	National Planning Policy Framework
NPS	National Policy Statement
O&M	Operation and Maintenance
OECD	Organisation for Economic Co-operation and Development
ONS	Office for National Statistics
PDS	Project Design Statement
PEI	Preliminary Environmental Information
PRoW	Public Rights of Way
SNH	Scottish Natural Heritage
ZoI	Zone of Influence