



Dudgeon and Sheringham Shoal Offshore Wind Farm Extensions

Preliminary Environmental Information Report

Volume 3

Appendix 29.2 - Socio-Economics and Tourism

Technical Baseline

April 2021



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Glossary of Acronyms

A&E	Accident and Emergency
AI	Artificial Intelligence
ANGSt	Accessible Natural Green Space standards
AONB	Area of Outstanding Natural Beauty
B&B	Bed and Breakfast
CfD	Contracts for Difference
CORE	Centres for Offshore Renewable Engineering
DCO	Development Consent Order
DEP	Dudgeon Extension Project
DPD	Development Planning Document
EZ	Enterprise Zones
FTE	Full-Time Equivalent
GP	General Practitioner
GVA	Gross Value Added
HoC	House of Commons
IMD	Index of Multiple Deprivation
LEP	Local Enterprise Partnership
LIS	Local Industrial Strategy
LQ	Location Quotient
LSOA	Layer Super Output Area
MHCLG	Ministry for Housing, Communities and Local Government
MPS	Marine Policy Statement
NPPF	National Planning Policy Framework
NPS	National Policy Statement
NSIP	Nationally Significant Infrastructure Projects
O&M	Operations and Maintenance
ONS	Office for National Statistics
OWGP	Offshore Wind Growth Partnership
PEIR	Preliminary Environmental Impact Report
PRoW	Public Rights of Way
R&D	Research and Development
SEP	Sheringham Shoal Extension Project

Glossary of Terms

The Applicant	Equinor New Energy Limited
Enterprise Zone (EZ)	Enterprise Zones deliver a wide range of benefits to business located within their boundaries including a business rate discount of up to £275,000 over five-years, a simplified planning regime, and access to superfast broadband.
Full-Time Equivalent Jobs (FTE Jobs)	The total number of jobs after converting jobs with less than full-time hours and jobs with more than full-time hours into full-time hour jobs. Full-time hours are assumed to be 37.5 hours per week (e.g. a job with 20 hours per week would be 0.5 Full-Time Equivalent jobs).
Gross Value Added (GVA)	The measure of the value of goods and services produced in an area, industry or sector of an economy. At the level of a firm, it is broadly equivalent to employment costs plus a measure of profit.
Local Enterprise Partnership (LEP)	Voluntary partnerships between local authorities and businesses set up in 2011 by the Department for Business, Innovation and Skills to help determine local economic priorities and lead economic growth and job creation within the local area.
Location Quotient (LQ)	The proportion of employment in a sector/industry in East Anglia divided by that of the UK.

29.2 SOCIO-ECONOMICS AND TOURISM TECHNICAL BASELINE

29.2.1 Introduction

1. Equinor New Energy Limited (hereafter Equinor) is proposing to extend the existing operational Dudgeon and Sheringham Shoal Offshore Wind Farms, named the Dudgeon Offshore Wind Farm Extension Project (hereafter DEP) and Sheringham Shoal Offshore Wind Farm Extension Project (hereafter SEP).
2. DEP has an expected capacity up to 448MW, with between 17 and 32 wind turbines. On the other hand, SEP has an expected capacity up to 338MW, with between 13 and 24 wind turbines. This implies a turbine capacity of between 14MW and 26MW.
3. This note sets out the socio-economic baseline in which DEP and SEP are to be delivered, covering the national, sub-regional and local policy context, in addition to a detailed assessment of the key socio-economic indicators within the study area. Where relevant/ appropriate, comparison with the national average is included to provide additional context to the analysis.

29.2.2 Policy Context

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

29.2.2.1 National Policy Context

29.2.2.1.1 UK Industrial Strategy

5. The 2017 White Paper entitled *Industrial Strategy: building a Britain fit for the future* (HM Government, 2017a) sets out the Government's vision for the UK economy. The Strategy's underlying motivation is '*to create an economy that boosts the productivity and earning power throughout the UK*'.
6. It identifies five foundations of productivity that align to the Government's economic vision, supporting:
 - The creation of high value jobs and skills (People);
 - Investment and sector growth through Sector Deals (Business Environment);
 - Innovation, research and development (R&D);
 - Investment opportunities (Ideas);
 - Investment in digital, transport, housing, low carbon and other infrastructure (Infrastructure); and
 - Developing Local Industrial Strategies which focus on local strengths (Places).
7. In addition, the Strategy sets out four Grand Challenges for the UK Government and the economy as a response to global opportunities, including:
 - Artificial intelligence (AI);
 - Clean growth;

- Future of mobility; and
 - Ageing society.
8. Clean Growth has been identified as one of the main opportunities for the UK economy to take advantage of, through the ‘*development, manufacture and use of low carbon technologies, systems and services*’. Offshore wind is one of the areas where the UK has been identified as having world-leading capabilities, and the Strategy therefore aims to maximise the share of the global markets taken up by UK businesses in the sector. In support of this, the UK government has committed to increasing support for innovation to reduce the costs of clean technologies, systems and services.

29.2.2.1.2 *Clean Growth Strategy*

9. Connected to the *UK Industrial Strategy*, the UK Government has also developed a *Clean Growth Strategy* (HM Government, 2017b) to ensure economic growth goes hand in hand with greater protection for the natural environment. Within this is a commitment to help businesses and entrepreneurs seize opportunities of a low carbon economy, and specifically offshore wind. This is driven by policies and processes to improve the route to market for renewable technologies such as offshore wind. Examples include up to £557 million for further Pot 2 Contracts for Difference (CfD) auctions and working with industry to develop an ambitious sector deal for offshore wind.
10. Under its ambition to deliver clean, smart and flexible power the *Clean Growth Strategy* seeks to deliver a diverse electricity system that supplies homes and businesses with secure, affordable and clean power. It seeks to deliver this through the development of low carbon sources of electricity (including renewables) and acknowledges that the UK is well-placed to benefit and become one of the most advanced economics for smart energy and technologies.
11. The *Clean Growth Strategy* also outlines plans by the Government to invest around £900 million of public funds between 2015 and 2021 in research and innovation in the power sector. This includes around £177 million aimed at reducing the cost of renewables, including innovation in offshore wind turbine blade technology and foundations. New innovation opportunities are likely to arise across several areas, including floating offshore wind platforms.

29.2.2.1.3 *Energy White Paper – Powering our Net Zero Future*

12. In November 2020, the Prime Minister announced a Ten Point Plan to lay the foundations for a Green Industrial Revolution. Starting by supporting 90,000 jobs across the UK in this Parliament, and up to 250,000 by 2030.
13. The Energy White Paper (HM Government, 2020) provides further clarity on the Prime Minister’s measures and puts in place a strategy for the wider energy system that transforms energy, supports a green recovery and creates a fair deal for consumers.

14. Offshore Wind is one of the 10 priority points of the plan. By 2030 the Government aim to quadruple the UK's offshore wind capacity, to 40GW, they will back new innovations to make the most of Offshore Wind and invest in bringing jobs and growth to the UK's ports and coastal regions.

29.2.2.1.4 UK Industrial Strategy - Offshore Wind Sector Deal

15. The UK Government and the offshore wind industry have committed to a sector deal (HM Government, 2018) to help the industry raise the productivity and competitiveness of UK companies to ensure the country continues to play a leading role as the global market grows in the decades to 2050. Key commitments include:
- Increasing UK content to 60% of value associated with offshore wind farm activity by 2030;
 - £250 million industry investment in building a stronger UK supply chain to support productivity and increase competitiveness;
 - Providing forward visibility of future CfD rounds with support of up to £557 million;
 - Increasing exports fivefold to £2.6 billion by 2030; and
 - Increasing the representation of women in the offshore wind workforce to at least a third by 2030.
16. At the start of March 2020, the government issued a one-year progress note (BEIS, 2020) on the *Offshore Wind Sector Deal*, highlighting a number of major developments in the sector such as:
- **Development and establishment of the Offshore Wind Growth Partnership (OWGP)** – A long-term business transformation programme aimed at promoting closer collaboration across the sector's supply chain, implement productivity improvement programmes, and facilitate shared growth opportunities between developers and the supply chain. The OWGP's objective is to maximise the economic benefits of the UK's world-leading position in offshore wind by delivering increased productivity and competitiveness. To date, the OWGP has completed an in-depth assessment of capacity in the delivery of offshore wind foundations, and made recommendations on how barriers to growth can be overcome.
 - **Development of regional clusters** – Clusters are a collaboration between developers and regional supply chain, public sector and education bodies, with the ambition to increase productivity, competitiveness and innovation, whilst also helping to grow coastal economies. East Anglia is identified as one of the offshore wind clusters along the British coastline (incl. North Scotland, the North East, the Humber, Solent and North West/ North Wales).
 - **Appointment of a Diversity Champion.** – The Government seeks to increase diversity within the industry. The sector has introduced a workforce and skills model developed by the National Skills Academy for Rail (NSAR) to track and report on workforce data. Data is being gathered from the operators, developers

and original equipment manufacturers (OEMs) with plans to gather from the clusters over the longer term.

17. The progress note highlights that since publication of the *Offshore Wind Sector Deal*, the costs of offshore wind have continued to fall reaching £39.65/MWh (2012-pricing) for offshore wind farms to be delivered in 2023/24. This represents an overall decrease of around 65% when compared with projects in the 2015 auction.
18. Furthermore, the note indicates that whilst the *Sector Deal* is progressing well, the government seeks to be more ambitious in order to achieve net zero carbon by 2050. This is likely to require higher volumes of offshore wind deployment than previously envisaged to meet greater levels of electrification across the economy.
19. Shortly following publication of the *Sector Deal* progress note, the UK went in to a full lockdown associated with the COVID-19 pandemic, resulting in the start of a prolonged economic recession (Financial Times, 2020). At this stage it is not known what impact this recession will have on the ongoing development of the offshore wind sector, and the impact this will have on the implementation (and indeed delivery) of the *Sector Deal*.

29.2.2.1.5 UK Industrial Strategy – Tourism Sector Deal

20. The *Tourism Sector Deal* (HM Government, 2019) builds on the *Industrial Strategy*, by creating a framework which positions the tourism industry to take advantage of new markets whilst also leveraging initiatives designed to deliver the Strategy's Grand Challenges relating to the data-driven economy (AI), clean growth and ageing society.
21. The *Tourism Sector Deal* sets out an ambitious agenda that will deliver increases in productivity and investment to benefit local economies across the country. The Sector Deal introduces the concept of Tourism Zones, bringing together businesses and local organisations to establish a coordinated strategy for growth and encourage increased visitor activity (and numbers) throughout the off-season.
22. The government is also introducing two new T levels in Cultural Heritage and Visitor Attractions, as well as Catering to help deliver the industry workers of the future. This includes support to deliver 30,000 apprenticeships per year by 2025, and a mentoring programme aimed at supporting 10,000 employees enhance their careers and develop as future leaders in tourism.
23. By 2025, the *Tourism Sector Deal* will:
 - More than double the size of the industry nationally to £268 billion;
 - Grow employment in the sector to 3.8 million; and
 - Deliver a 1% increase in productivity worth £12 billion to the national economy.
24. Please note that the targets outlined above reflect a pre-COVID-19 targets. These will need to be reviewed/ rebased to enable the industry recover from the adverse effect brought about as a result of the pandemic as well as national and local lockdown measures implemented to contain its spread.

29.2.2.2 National Policy Statement for Energy

25. Planning policy on offshore renewable energy nationally significant infrastructure projects (NSIPs), specifically in relation to socio-economics is contained in the Overarching National Policy Statement (NPS) for Energy (DECC, 2011c) (henceforth referred to as NPS EN-1), the NPS for Renewable Energy Infrastructure (DECC, 2011b) (henceforth referred to as NPS EN-3) and the NPS for Electricity Networks Infrastructure (DECC, 2011a) (henceforth referred to as NPS EN-5). Neither NPS EN-3 nor NPS EN-5 provide specific guidance on socio-economic issues.
26. NPS EN-1 includes guidance on the socio-economic matters that need to be considered in the assessment of energy infrastructure projects, including:
 - The creation of jobs and training opportunities (see Section 5.12.3);
 - The provision of additional local services and improvements to local infrastructure, such as educational and/ or visitor facilities (see Section 5.12.3);
 - The impact of a changing influx of workers during construction, operations and maintenance (O&M) and decommissioning phases (see Section 5.12.3); and
 - Cumulative effects (see Section 5.12.3).
27. In addition, NPS EN-1 also includes guidance on tourism-related matters (considered as part of the wider economy) that need to be considered in the assessment of energy projects, including:
 - An assessment of the effects on the coast, and in particular the effects of the proposed project on maintaining coastal recreation sites and features (see Section 5.5.7);
 - The need to consult with the local community on proposals to build on open space, sports and/ or recreational buildings and land. *'Taking account of the consultations, applicants should consider providing new or additional open space including green infrastructure, sport or recreation facilities, to substitute for any losses as a result of their proposal'* (see Section 5.10.6); and
 - All relevant socio-economic impacts, which may include effects on tourism (see Section 5.12.3).

29.2.2.2.1 National Planning Policy Framework

28. The National Planning Policy Framework (MHCLG, 2019b) (henceforth NPPF) emphasises that one of the overarching objectives of the planning system is to contribute to the achievement of sustainable development. This includes backing the transition to a low carbon future by supporting the transition to renewable and low carbon energy (and associated infrastructure).
29. Whilst NPPF does not contain specific policy statements for nationally significant infrastructure projects and outlines three overarching dimensions (ie. economic, social and environmental) which are a relevant consideration. Two of these are especially pertinent to the socio-economic assessment:
 - **Economic** – to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and

- at the right time to support growth and innovation, and by identifying and co-ordinating development requirements, including the provision of infrastructure.
- **A social role** – supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations, and by creating a high-quality built environment with accessible local services that reflect the community’s needs and support its health, social and cultural well-being.
 - **Environmental** – protect and enhance the natural, built and historic environment, including making effective use of land, helping to improve biodiversity, using natural resources prudently, minimising waste and pollution, and mitigating and adapting to climate change (including a move to a low carbon economy).
30. The NPPF suggests that the planning system should enable sustainable rural tourism (in para. 83) whilst also supporting the transition to a low carbon future (in para. 148). In addition, NPPF states that the planning system should shape places in ways that contribute to radical reductions in greenhouse gas emissions; minimise vulnerability and provide resilience to the impacts of climate change; and support the delivery of renewable and low carbon energy and associated infrastructure.

29.2.2.2 *The Marine Policy Statement 2011*

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

29.2.2.3 *Sub-Regional and Local Policy Context*

33. The New Anglia Local Enterprise Partnership’s (LEP) *Strategic Economic Plan* (New Anglia LEP, 2014) identifies the offshore energy sector as a key growth opportunity area over the next decade. The Plan highlights that the area is well placed to capitalise on market growth in the renewable sector with the ports of Lowestoft and Great Yarmouth, which together form one of six Centres for Offshore Renewable Engineering (CORE). Parts of Lowestoft and Great Yarmouth have been given Assisted Area Status which enables increased support, and there are two Enterprise Zones (EZ) which can attract inward investment.

34. The energy sector has a long-standing history in East Anglia. Whilst this was previously focussed on oil and gas, energy production is now also starting to expand into the offshore wind sector. East Anglia is very well positioned to capitalise on the rapid development of the renewables sector, with several offshore wind investments having taken place over the past two decades. Recent offshore wind projects such as Dudgeon, Sheringham Shoal, Tritton Knoll, Race Bank, Hornsea One, Scroby Sands, and East Anglia ONE have drawn on ports and supply chain located in East Anglia either for construction and/ or O&M activities.
35. Advanced manufacturing and engineering, agri-tech, ICT and digital creative, and the life sciences sector are all priority sectors for the New Anglia LEP. The LEP considers these sectors as having potential for rapid growth, both in absolute terms and productivity, and therefore playing a vital role in reducing the productivity gap which exists between East Anglia and the UK average. The Strategic Economic Plan also identifies four underpinning sectors which are the largest employers and which will continue to be supported in order to improve their productivity and competitiveness, including (1) agriculture, food and drink, (2) finance and insurance services, (3) port and logistics, and (4) tourism and culture.
36. The Strategic Economic Plan identifies the following targets for East Anglia between 2012 and 2026:
 - Delivering 95,000 additional jobs;
 - Creating 10,000 new businesses;
 - Improving productivity by narrowing the gap in GVA per head with the UK average from 7.8% in 2012; and
 - Delivering 117,000 new houses.
37. To implement these ambitions, the Strategic Economic Plan identifies growth locations that accommodate the high impact priority sectors and are expected to deliver employment and housing growth.
38. Furthermore, the establishment of the two Enterprise Zones (Beacon Park and South Denes) in Great Yarmouth borough is intended to support the development of the offshore energy sector and economic growth, attracting new businesses and job creation. The long-term vision is to have 150-200 businesses across the two Enterprise Zone sites, directly creating 9,000 new jobs by 2025 and a further 4,500 jobs indirectly in the supply chains.
39. On tourism, the Strategic Economic Plan highlights the unique tourism and culture offer in East Anglia, and states that the LEP will continue to support the sector to establish a portfolio of 'must see' cultural highlights aimed at increasing visitor-numbers by 5% per annum, in line with Visit England's growth predictions. Furthermore, the Strategic Economic Plan indicates that underpinning sectors will be encouraged to develop synergy with high impact sectors in East Anglia (eg. the existing cultural and tourism offer can benefit from the major developments in ICT and digital creative). In addition, the Strategic Economic Plan also supports efforts to increase tourism activity year-round, foreshadowing the case for increased productivity and year-round activity as set out in the Tourism Sector Deal.

40. The *Economic Strategy for Norfolk & Suffolk (New Anglia LEP, 2017)* outlines the future economic growth ambitions for Norfolk and Suffolk up to 2036. The strategy is based on New Anglia's LEPs Strategic Economic Plan and draws upon a detailed evidence base in order to set challenging but achievable ambitions as well as identifying key priority themes, investments and places. The economic strategy also identifies economic indicators and targets in order to be able to measure success. The headline vision going forward is, by 2036, to achieve additional 140,000 new homes, 88,000 net new jobs, 300,000 new businesses across Norfolk and Suffolk, as well as increasing GVA per hour to £39, increasing the proportion of the population with NVQ3+ to 66% and increasing the weekly median wage to £200. In addition, the strategy identified the ambition to have a higher proportion of people engaged in the labour market than is seen nationally, as well £17.5 billion of growth in the economy (in real terms).
41. Within the economic strategy the Norfolk and Suffolk Energy Coast, which is branded as part of the East of England Energy Zone, is identified as a priority place, with the offshore wind industry a major component of the energy offering. The energy sector and offshore wind are recognised as important components of Norfolk and Suffolk's economy going forward.
42. The *Suffolk and Norfolk Local Industrial Strategy (Norfolk and Suffolk Unlimited, 2020)* (henceforth LIS) builds on the Government's Industrial Strategy and reflects on the opportunities and needs of the area's growing economy, and how it will respond to a fast-changing world. Clean growth sits at the heart of the LIS which argues that the area's strengths in energy generation present major opportunities for Norfolk and Suffolk. Given its successful and long track record, Norfolk and Suffolk is very well placed to be a global exemplar for clear, low carbon energy production. The LIS identifies several actions, including:
 - The development of an ambitious research and innovation programme that seeks to build on existing clean energy research strengths; and
 - The enhancement of the capacity and capability of Norfolk and Suffolk's ports with a series of projects to attract and capture investment in O&M, as well as offshore wind manufacturing and construction.
43. The cultural sector is identified as one of the top ten priority sectors by the New Anglia LEP. The *Culture Drives Growth Strategy (New Anglia LEP, 2016)*, identifies several key outcomes for East Anglia by 2022, including supporting the cultural sector to increase its contribution to economic success within the region, increase investment into a nationally and internationally significant cultural offer that makes Norfolk and Suffolk 'must see' cultural destinations, and enhance the region's cultural profile for global audiences and visitors. In particular, the Growth Strategy seeks to increase the attractiveness of East Anglia – through building an inspiring place to live, work and invest, and strengthen its offer to visitors by broadening international engagement.
44. Whilst the application for development consent will be determined by the Secretary of State, local planning policy also includes material which is relevant to offshore wind farm developments, their relationships to local economic development, and the assessment of socio-economic impacts associated with DEP and SEP.

45. The onshore cable corridor for DEP and SEP is located within the districts of North Norfolk, South Norfolk and Broadland. As such, the following local planning documents have also been considered:
- *Joint Core Strategy for Broadland, Norwich and South Norfolk* (Greater Norwich Development Partnership, 2014) – The urban area of Norwich is one of the largest in the East of England, and in 2007 was home to over 200,000 people (out of a total of 372,500 across all three districts). The influence of the Norwich City stretches into the neighbouring local authorities, which led to the development of a single Core Strategy for Broadland, Norwich and South Norfolk. The key drivers of growth across the three authorities are the need for housing as a result of smaller households and people living longer, as well as through inward migration from other parts of the country, with house building rates falling behind demand. The Strategy aspires to deliver 27,000 jobs and 37,000 additional homes between 2008 and 2026.
The *Joint Core Strategy outlines the area's ambition to ensure more energy is sourced from renewable sources* (incl. offshore wind), with the following identified as being pertinent to the socio-economic assessment:
 - **Policy 3: Energy and water** aims to minimise reliance on non-renewable energy sources and maximise the use of low carbon sources.
 - **Policy 5: The economy** states that the local economy will be developed in a sustainable way to support jobs and economic growth in both urban and rural locations. This includes the promotion of tourism and leisure industries through an increased emphasis on achieving environmental enhancement and retention of local distinctiveness.
 - **Policy 21: Implementation of proposals in the Broadland part of the Norwich Policy Area** states that Broadland District Council will work proactively with applicants jointly to find solutions [and] secure development that improves economic, social and environmental conditions in the area.
 - The *Broadland Development Management Development Planning Document* (Broadland District Council, 2015) (*henceforth DPD*) sets out the policies to be applied at the district, and conforms with the Joint Core Strategy for Broadland, Norwich and South Norfolk outlined above. In Policy GC5 – Renewable Energy, the DPD argues that proposals for renewable energy technology, associated infrastructure and the integration of renewable technology will be encouraged where its impacts are and/ or can be made acceptable. In particular, the DPD campaigns to ensure sufficient protection for the area's distinctive and sensitive landscape.
 - *North Norfolk Core Strategy* (North Norfolk District Council, 2008) – North Norfolk's economy reflects its coastal location, with tourism and retail, as well as the rural economy, accounting for a large part of its economy. It has seen a decline in manufacturing and agricultural employment in recent years. Its

indicative growth target is to see jobs growth of 4,000 between 2008 and 2021. It commits North Norfolk District Council to supporting development that has other employment generating proposals, including renewable energy plants. The *North Norfolk Core Strategy* sees an increasing role for renewable energy generation (incl. offshore wind). Core Aim 2 of the Strategy focusses on mitigating and adapting the effects of climate change by encouraging renewable energy production. Other relevant policies are outlined below:

- **Policy EN7** states that renewable energy proposals will be supported, and that for large-scale projects the proposal should seek to deliver economic, social, environmental and/ or community benefits of a reasonable scale to the local area.
- **Policy SS1** highlights the Core Strategy's overall ambition to achieve social, environmental and economic benefits, whilst also supporting the vitality and viability of town centres, maintaining the vitality of rural communities, achieving sustainable development and minimising carbon emissions. These are to be achieved through a variety of measures, including reducing energy use and carbon emissions whilst also promoting renewable energy sources.
- **Policy SS2** states that in areas designated as countryside, development will be limited to that which requires a rural location and is, amongst other things for recreation and tourism, as well as renewable energy projects.
- **Policy SS4** states that renewable energy proposals will be supported where impacts on amenity, wildlife and landscape are acceptable.
- **Policy SS5** lends its support to the tourist industry, through the retention of a mix of accommodation types, and encouraging new accommodation and attractions aimed at diversifying the local offer and extending the tourist season.
- *Great Yarmouth Core Strategy* (Great Yarmouth Borough Council, 2015) - The borough of Great Yarmouth, which has a substantial coastline along the North Sea, which shapes the nature of its economy which is driven by the offshore energy sector, its port and tourism. There are two Enterprise Zones in the borough: Beacon Park and South Denes. These are expected to play a vital role in attracting new businesses into the area, growing the energy sector and creating employment. The long-term vision is to have 150-200 businesses across the two Enterprise Zones, directly creating 9,000 jobs by 2025 and a further 4,500 jobs indirectly.
- *East Suffolk Local Plan* – In April 2019, East Suffolk Council was created covering the former districts of Suffolk Coastal District Council and Waveney District Council. The Waveney Local Plan (East Suffolk Council, 2019) adopted in March 2019 sets out the level of growth which needs to be planned in the Waveney area of East Suffolk. It acknowledges that the area has huge potential

for growth associated with the development of offshore wind farms, with the area in and around the Outer Harbour being defined as the PowerPark. Policy WLP2.2 states that land at PowerPark is to be allocated for employment development and port-related development. Associated and ancillary uses necessary to support the offshore energy and engineering sectors will also be permitted.

29.2.3 Socio-Economic Baseline Analysis

46. The socio-economic baseline analysis is desk based, and draws on a range of published datasets and research reports. It describes the socio-economic characteristics of the study area by exploring a range of socio-economic indicators that are particularly relevant to the selected receptors.
47. The key sources of data used to assess the baseline environment include the policy documents set out in the previous section, and the relevant national datasets from the Office for National Statistics (ONS) providing data on population, labour market and employment base conditions at the national and local levels. Where data is not available at the UK level (for example, ONS employment data is available for Great Britain rather than the United Kingdom) this is clearly stated.
48. The analysis draws on the most up-to-date sources available at May 2020 for all key socio-economic indicators, although the year that the data relates to varies according to the release calendar for each dataset. The baseline year for all socio-economic indicators is referenced throughout this appendix and stated in the table below.

Table 29.2.1: Key Data Sources for Baseline Indicators

Receptor	Indicator	Source	Year Data was Released	Baseline Year of Latest Data
1. Direct economic benefit	Gross Value Added (GVA)	ONS Gross Value Added (balanced approach)	2019	2018
	Offshore wind supply chain	ONS, UK Business Count	2020	2019
2. Increased employment	Employment	ONS, Business Register and Employment Survey	2018	2019
	Industry breakdown			
3. Change in demographics	Population estimates	ONS, Mid-Year Population Estimates	2018	2019
	Working age population			

Receptor	Indicator	Source	Year Data was Released	Baseline Year of Latest Data
	Population projections	ONS, 2018-based Sub-National Population Projections	2020	2018-2043
	Economic activity	ONS, Annual Population Survey	2019	2020
	Employment rate			
	Unemployment			
	Claimant count	ONS, Claimant Count	2020	2020
	Occupational breakdown	ONS, Annual Population Survey	2019	2020
	Skills			
	Quality of life	ONS, English Indices of Deprivation	2019	2019
4. Loss of/ disruption to local infrastructure	Infrastructure	Norfolk County Council, Infrastructure Delivery Plan, 2017-2027		
5. Disturbance to social and community infrastructure	Housing	MHCLG, Local Authority Housing Data	2019	2020
	Strategic infrastructure	Norfolk County Council, Strategic Infrastructure Delivery Plan, 2019 Babergh and Mid-Suffolk, Infrastructure Delivery Plan, 2019-2036	n/a	n/a

Receptor	Indicator	Source	Year Data was Released	Baseline Year of Latest Data
		St Edmundsbury, Infrastructure Delivery Plan, 2010		
6. Pressure on local health infrastructure	GP registrations	NHS, General Practice Workforce		
	A&E facilities	NHS, A&E Attendances and Emergency Admissions – monthly statistics	2020	2020

29.2.3.1 Study area

49. The study area for the baseline assessment is based on the aggregation of Suffolk and Norfolk counties (to correspond with the New Anglia LEP area) and will henceforth be referred to as East Anglia. The assessment will also provide detailed breakdown for both Norfolk and Suffolk counties. Where appropriate, data for districts within East Anglia is also included. Data for the UK (Great Britain or England where UK data is not available) is also presented as a wider comparator to provide additional context to the various indicators.

29.2.3.2 Economy

29.2.3.2.1 Employment

50. Data from the ONS indicates that there are 692,000 employee jobs in East Anglia, which equates to an estimated 568,000 full-time equivalent (FTE) jobs in 2018. Employment density in East Anglia is around 692 jobs for every 1,000 working age resident, which is below the national average by 27 jobs for every 1,000 residents (see **Table 29.2.2**: Employment and Employment Density in East Anglia, 2018). Within East Anglia, Norfolk provides more jobs than Suffolk with 369,000 employees equating to around 301,000 FTE jobs. However, Norfolk has a lower employment density than Suffolk, with 693 jobs per 1,000 working aged residents (compared with 726 jobs per working age residents in Suffolk).

Table 29.2.2: Employment and Employment Density in East Anglia, 2018

Area	Total Number of Employee Jobs (000s)	FTE jobs (000s)	Employment Density (jobs per 1,000 working age residents)
Norfolk	369	301	693
Suffolk	324	267	726

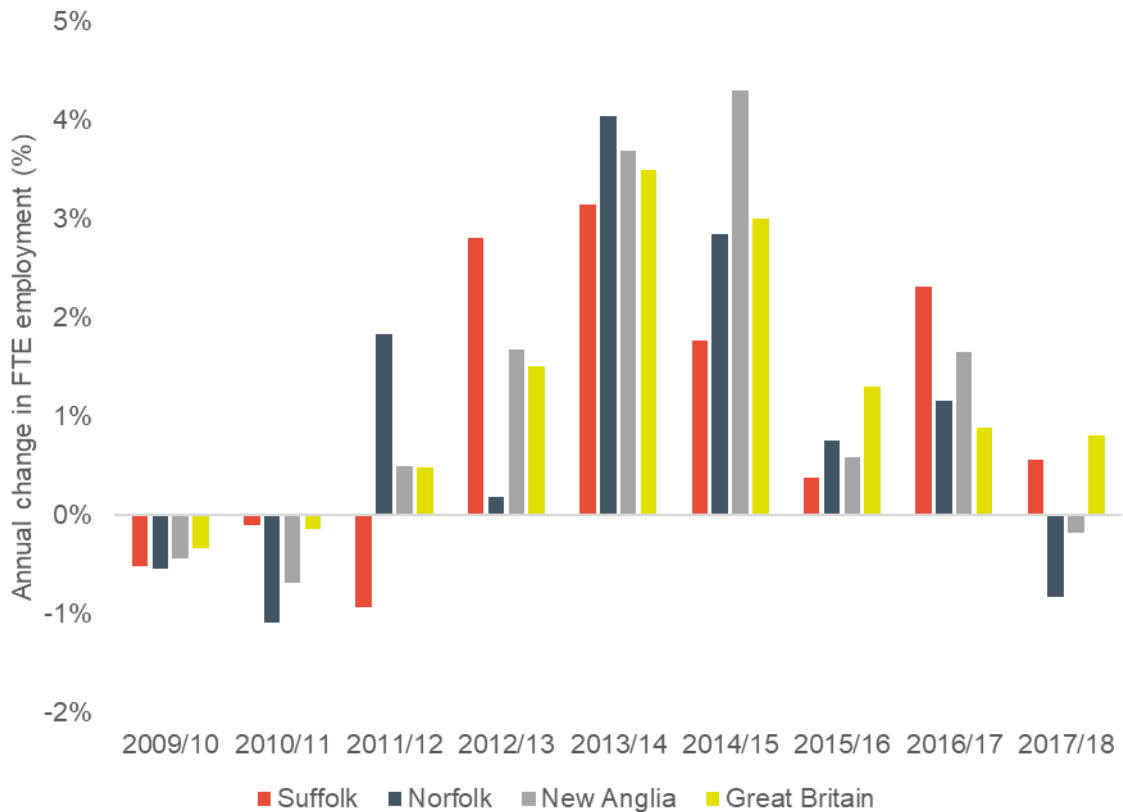
Area	Total Number of Employee Jobs (000s)	FTE jobs (000s)	Employment Density (jobs per 1,000 working age residents)
East Anglia	692	568	708
Great Britain*	29,758	24,945	735

Source: ONS (2018a).

*Please Note: Great Britain data is used instead of UK as UK data is not available.

51. Since 2009, the East Anglia economy grew by around 58,800 FTE jobs, with the annual change in job numbers largely following the national trend. However, the data for 2017-18 show that as a whole East Anglia experienced a decline in employment for the first time since 2010-11, with an overall decline of 0.2% (compared with +0.8% nationally). This is largely the result of a decline of 0.8% in employment numbers in Norfolk between 2017-18.

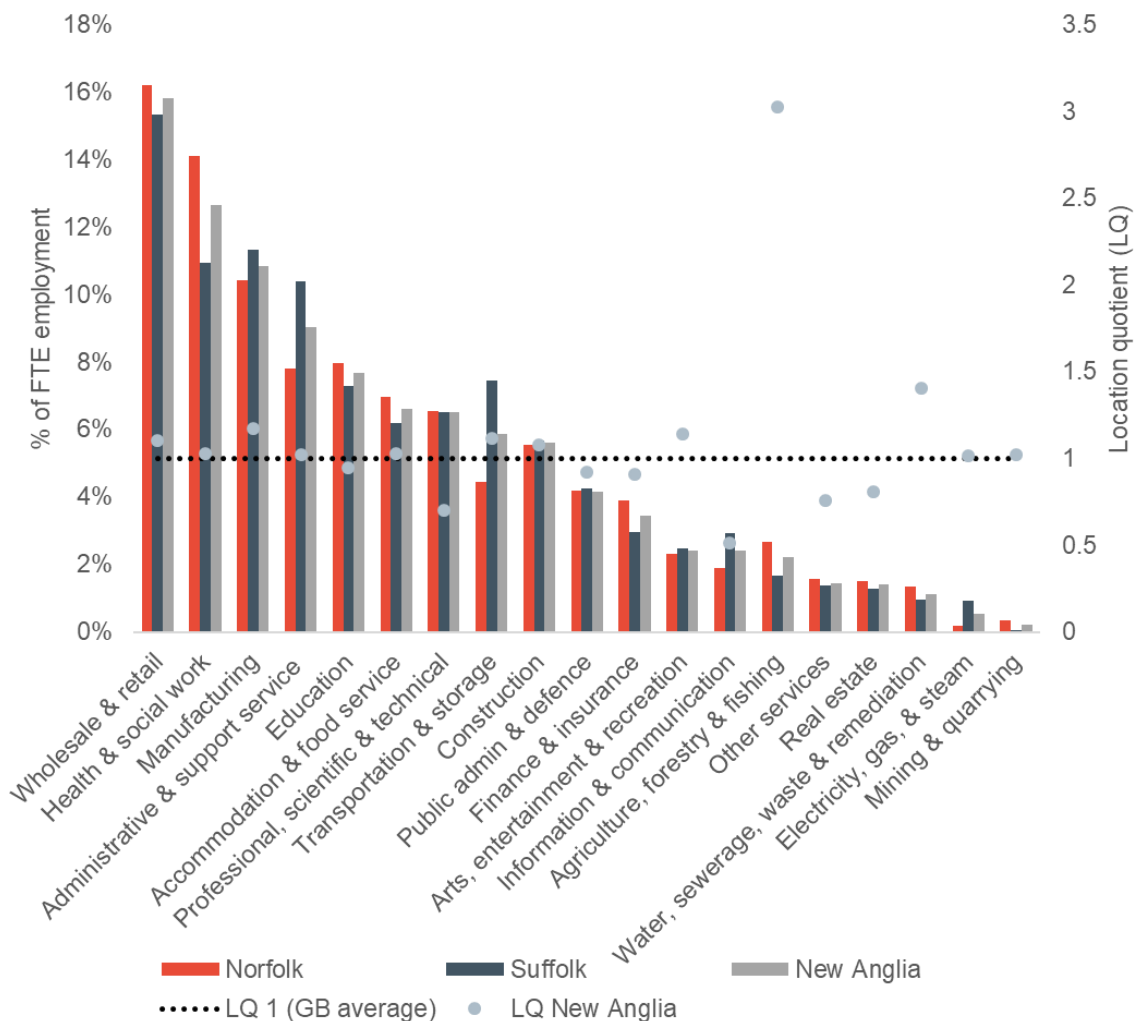
Figure 29-1: Annual Change in Estimated FTE Employment, 2009-18



Source: ONS (2018a).

52. Analysis of employment by sector highlights the importance of wholesale & retail, health & social work and manufacturing across New Anglia. These sectors are more concentrated locally than is the case nationally and together represent 39% of all FTE jobs in East Anglia (41% of jobs in Norfolk and 38% of jobs in Suffolk).
53. In the context of offshore wind farms, construction, manufacturing, professional services and hospitality sectors are particularly important. The construction and the accommodation & food sectors are more concentrated in New Anglia than nationally (both have location quotients (LQ) of 1.1). However professional services are much less concentrated in East Anglia than can be seen nationally (with an LQ of 0.7).

Figure 29-2: Sectoral distribution of employment, East Anglia 2018



Source: ONS (2018a).

*Please Note: Great Britain data is used instead of UK as UK data is not available. Hatch calculations are used to estimate the FTE level.

29.2.3.2.2 *Supply Chain Capacity and Capability*

54. The East Anglia economy has benefitted from several offshore wind developments over the past decade recent years (incl. Sheringham Shoal, Dudgeon, Greater Gabbard, Galloper, East Anglia ONE and Scroby Sands), building on its existing industry strengths and future capabilities. It also has an important offshore oil and gas sector.
55. There are many businesses established in East Anglia that are involved in offshore wind developments. This is likely to increase over time as new offshore wind farms are developed off the coast of East Anglia, or existing ones are expanded (such as the case of DEP and SEP) and/ or built-out. As set out in the LIS, this will likely lead to additional investment in port infrastructure and the capacity and capability of the local supply chain is expanded.
56. Recent investment includes a new operations and maintenance (O&M) base for the East Anglia ONE offshore wind farm, built on land adjacent to Hamilton Dock in the Port of Lowestoft. The agreement to build the O&M base was first announced in November 2015 when the site was just an area of scrub on the edge of the port. The base will support East Anglia ONE throughout its 30-year operational lifecycle, supporting local employment and the ongoing development of supply chain capability.

29.2.3.2.3 *Key supply chain sectors in Offshore Wind Construction and O&M*

57. Given the development of the offshore wind industry in East Anglia, there may be opportunities for businesses across several sectors to benefit from the construction and O&M activities related to DEP and SEP. Employment data shows specialisms at the East Anglia level for a number of key strategic sectors, including marine transport (LQ 2.0), energy generation (LQ 1.3), civil engineering and manufacturing (both with a LQ 1.1).

Table 29.2.3: Employment in Key Strategic Sectors

Sector	GB Employment (FTEs)		New Anglia Employment (FTEs)		New Anglia LQ
	No. (000s)	%	No, (000s)	%	
Manufacturing	2,304	9.2%	62	10.8%	1.2
Construction	1,298	5.2%	32	5.6%	1.1
Land based transport	511	2.0%	13	2.3%	1.1
Civil Engineering	199	0.8%	5	0.9%	1.2
Energy Generation	98	0.4%	3	0.5%	1.3

Sector	GB Employment (FTEs)		New Anglia Employment (FTEs)		New Anglia LQ
	No. (000s)	%	No, (000s)	%	
Marine Transport	12	0.0%	0.6	0.1%	2.0

Source: ONS (2018a).

Please Note: Numbers are rounded to nearest 1,000. Hatch calculations are used to estimate the FTE level.

58. There are several specialisms within the East Anglia employment base which position the area well to benefit from DEP and SEP. The area shows specialisms within several sub-sectors which have opportunities for expansion due to offshore wind farm construction and O&M, including the manufacturing of wires and devices, freight transport by road, accommodation, sea and coastal freight water transport, support activities for transportation, electric generation, transmission, distribution and other professional, scientific and technical work.
59. The transport sector has an overall employment base of over 18,000 FTE jobs in East Anglia, which is driven by the presence of several key ports within the region (incl. Great Yarmouth, Lowestoft, Felixstowe, Ipswich and Harwich).
60. Within Norfolk, water transport (LQ 1.4), freight transport by road (LQ 1.1), professional services and accommodation (both with LQ 1.5) show the highest level of specialisation. Similarly, in Suffolk water transport (LQ 2.8), freight transport by road (LQ 1.9), professional services (LQ 1.7) and accommodation (LQ 1.5) show high levels of specialisation. Other specialisms in Suffolk include support activities for transportation (LQ 3.0), the manufacturing of wiring and wiring devices (LQ 3.1), and electric generation, transmission and distribution (LQ 2.3).

Table 29.2.4: Employment in Sectors with Supply Chain Opportunities for Construction and O&M, 2018

Sector	New Anglia		Norfolk		Suffolk	
	No. (000s)	LQ	No. (000s)	LQ	No. (000s)	LQ
Manufacturing:						
Fabricated metal products	0.6	0.6	0.4	0.6	0.3	0.5
Motors, generators, transformers etc.	0.4	0.7	0.3	0.9	0.1	0.5
Wiring and wiring devices	0.4	1.4	0.0	0.0	0.4	3.1
General purpose machinery	0.9	0.9	0.2	0.4	0.7	1.4
Building of ships and boats	0.3	0.5	0.2	0.7	0.1	0.2
Other civil engineering projects	2.4	0.9	0.9	0.6	1.3	1.0
Construction sectors:						

Sector	New Anglia		Norfolk		Suffolk	
	No. (000s)	LQ	No. (000s)	LQ	No. (000s)	LQ
Building of ships and boats	0.3	0.5	0.2	0.7	0.1	0.2
Other civil engineering projects	2.4	0.9	0.9	0.6	1.3	1.0
Transport sectors:						
Freight transport by road	8.6	1.6	3.3	1.1	4.9	1.9
Sea and coastal freight water transport	0.2	2.1	0.1	1.4	0.1	2.8
Support activities for transportation	9.5	1.8	2.1	0.8	7.4	3.0
Professional services:						
Management consultancies	5.3	0.5	2.4	0.4	2.6	0.6
Architectural, engineering consultancy	9.1	0.9	5.1	0.9	3.4	0.7
Other professional, scientific and technical	3.9	1.6	1.9	1.5	2.0	1.7
Accommodation and food services:						
Accommodation	11.5	1.4	6.5	1.5	5.5	1.5
Food and beverage services	25.5	0.9	14.0	0.9	11.5	0.9
Other sectors:						
Electric generation, transmission, distribution	2.6	1.2	0.5	0.4	2.4	2.3
Total	81.2	--	37.9	--	42.6	--

Source: ONS (2018a).

Please Note: Numbers are rounded to nearest 1,000. Hatch calculations are used to estimate the FTE level.

29.2.3.2.4 Gross Value Added

61. Data from the ONS indicates that East Anglia contributed a just under £38 billion gross value added (GVA) to the UK economy in 2018. Within East Anglia, Suffolk and Norfolk account for an even split of GVA contribution, both contributing in the region of £19 billion in GVA.

62. GVA data per head of population shows a significant gap between East Anglia and the UK, with GVA per head in East Anglia being 21% below the national average (or approximately £22,700 per head compared with £28,700 per head nationally). Norfolk sits further below the national average, with a GVA per head of £21,000. This reflects the presence of low skilled occupations locally, and the sectoral composition within the employment base (characterised by relatively low value sectors). As the centre of economic activity in the county, Norwich is an exception with a GVA per head of over £30,000, which is over the national average. This can be explained by the presence of higher-value jobs in the city.

Table 29.2.5: GVA and GVA per head, East Anglia 2018

Area	Total GVA (£ millions)	GVA per head
Norfolk	£18,981	£21,000
Norwich	£4,279	£30,300
Suffolk	£18,756	£24,700
East Anglia	£37,738	£22,700
UK	£1,908,608	£28,700
UK (excl. London)	£1,458,330	£25,400

Source: ONS (2018b).

Please Note: GVA is rounded to the nearest million £.

63. GVA per head has risen by 23% in East Anglia over the last 10 years (22% in Norfolk and 24% in Suffolk). This is below the level of GVA per head growth seen in the UK, which experienced a 27% increase over the last 10 years.

29.2.3.2.5 Population

64. East Anglia has a total population of around 1.66 million people, of whom 977,000 (or 59%) are of working age (ie. aged 16-64). Nationally, the proportion of working age residents is slightly higher (at 63%). Within East Anglia, there is very little variation in the proportion of working residents between Norfolk (58.8%) and Suffolk (58.7%).

Table 29.2.6: Population - Total and Working Age, 2018

Area	Population (000s)	Working Aged Population (aged 16-64) (000s)	Working Aged Population as a % of the Total (%)
Norfolk	904	531	58.8%
Suffolk	759	446	58.7%
East Anglia	1,662	977	58.8%
UK	66,436	41,646	62.7%

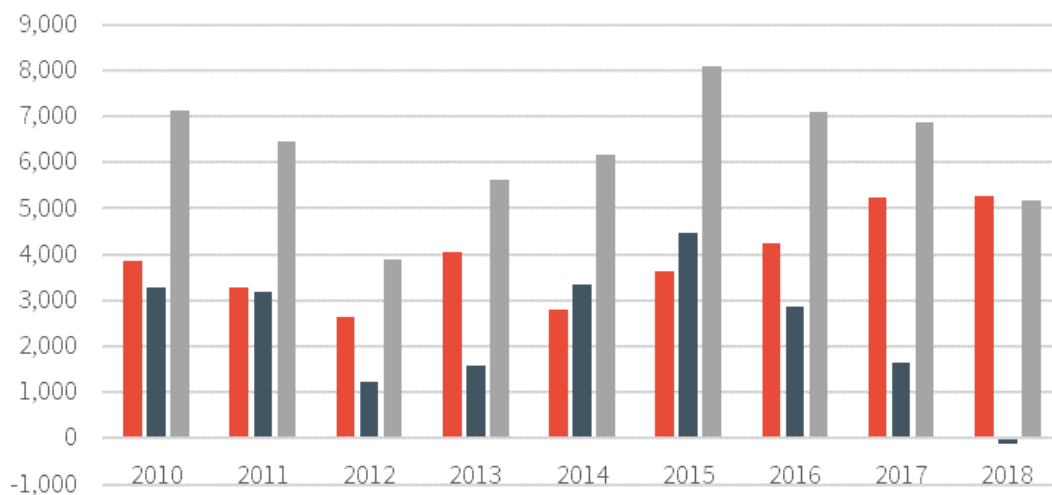
Source: ONS (2018b)

Please Note: Figures are rounded to the nearest 1,000.

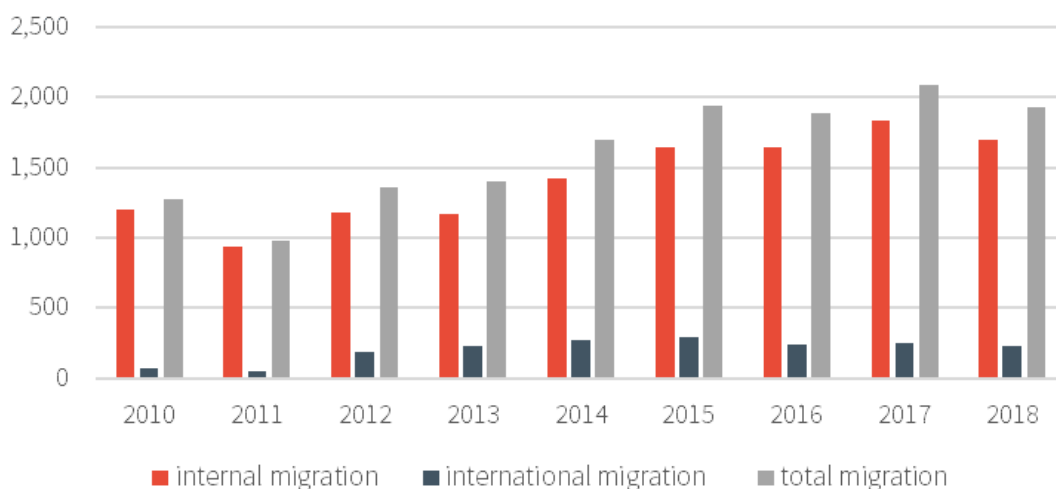
65. Overall, around a quarter (24%) of the total population in East Anglia is aged 65 and over (24.3% in Norfolk and 23.2% in Suffolk), which is substantially higher than the national average (of 18%) in 2018. Data from the ONS suggests that the higher proportion of residents aged 65 and over is in part driven by increasing levels of in-migration, particularly in the number of international migrants. On the other hand, whilst East Anglia still sees net additional migration of working age people, the annual number of working age migrants has been declining (falling from 7,100 net in-migrants in 2010 to around 5,200 net in-migrants in 2018), driven in part by international migration.

Figure 29-3: Changes in net migration for 16-64 (top) and 65+ (bottom) in East Anglia, 2010-18

Net migration for 16-64



Net migration for 65+



Source: ONS (2018b).

29.2.3.2.6 Future Population Change

66. In March 2020, the ONS released updated population projections for local authorities in England over the next 25-years (to 2043). These show that overall, East Anglia’s population is anticipated to increase by a little over 194,100 (or +12%) compared with a projected increase of +10% nationally. Within East Anglia, total population change is anticipated to change from 9% in Suffolk to 14% in Norfolk.
67. However, the population structure in East Anglia is expected to change substantially over the period to 2043. Overall, the working age population is projected to increase by a further 25,700 people (or +3%). Nationally the increase is anticipated to be slightly higher (at +4%). Within East Anglia, the change in working age population is expected to occur in Norfolk (+30,700 people / +6%), which the working age population in Suffolk is anticipated to fall by around 5,000 people. Over the same period, the number of residents aged 65 and over are projected to increase by around 169,700 people (or +43%).
68. The population projections are based on past demographic trends and does not account for future economic prospects.

Table 29.2.7: Population Projections, 2018-2043.

	0-15		16-64		65+		Total Population	
	No	%	No	%	No	%	No	%
Norfolk	3,300	2%	30,700	6%	92,200	42%	126,200	+14%
Suffolk	-4,600	-3%	-5,000	-1%	77,500	44%	67,900	+9%
East Anglia	-1,300	0%	25,700	3%	169,700	43%	194,100	+12%
England (000s)	-98.1	-1%	1,317.3	4%	4,547.7	45%	5,766.9	+10%

Source: ONS (2020)

29.2.3.3 Labour Market Indicators

69. East Anglia outperforms many of the national indicators on a number of key labour market indicators. East Anglia’s economic activity rate (of 81%) is higher than the UK average (of 79%), as is its employment rate (78%) when compared with the national average (76%). On the other hand, the proportion of working aged people who are economically inactive is below the national average (19% vs 21% nationally). Overall, Norfolk and Suffolk show similar labour market performance, with little variation from the East Anglia average across the three indicators mentioned (see [Table 29.2.8](#)).

Table 29.2.8: Labour market performance, Jan 2019-Dec 2019

Area	Economically Active		In Employment		Economically Inactive	
	Number (000s)	% Aged 16-64	Number (000s)	% Aged 16-64	Number (000s)	% Aged 16-64
Norfolk	424	80.9%	406	77.5%	100	19.1%
Suffolk	351	80.2%	342	78.3%	87	19.8%
East Anglia	775	80.6%	749	77.9%	187	19.4%
UK	32,557	78.8%	31,266	75.6%	8,774	21.2%

Source: ONS (2019).

Please Note: Numbers are rounded to nearest 1,000.

70. The average unemployment rate in East Anglia (3.4%) is lower than the average for the UK as a whole (4.0%). There is however a marked variation within East Anglia with Norfolk having an unemployment rate of 4.1% compared with a rate of 2.4% in Suffolk. Within Norfolk, Norwich drives the unemployment rate up, having the highest unemployment rate across East Anglia (at 7.6%).

Table 29.2.9: Number of Unemployed Residents, East Anglia Jan 2018 – Dec 2019

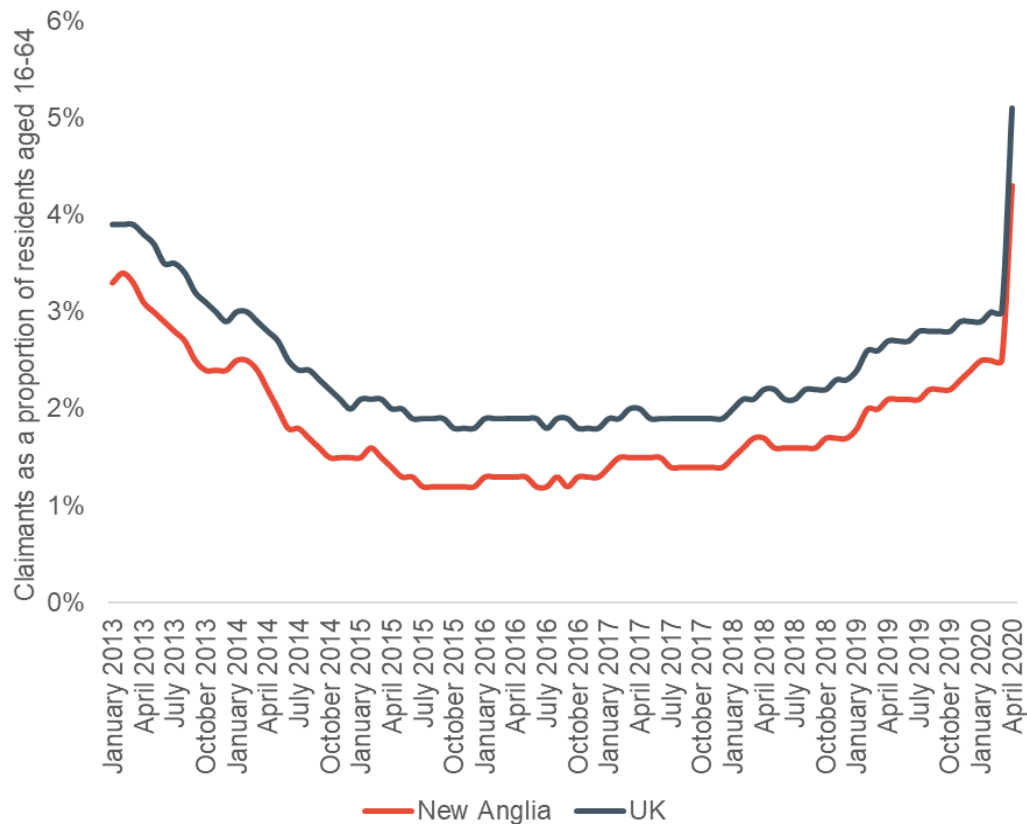
Area	Number unemployed (000s)	Unemployment Rate (% of economically active population)
Norfolk	18	4.1%
Suffolk	9	2.4%
East Anglia	26	3.4%
UK	1,290	4.0%

Source: ONS (2019).

Please Note: Numbers are rounded to nearest 1,000.

71. Claimant count data highlights the changing number of claimants over the last seven years. From 2013, the data shows falling rates across the UK and East Anglia as the UK economy continued its recovery from the recession. However, since 2015-16 the number of claimants as a proportion of working age population in both East Anglia and nationally has increased slightly.
72. Most recently, the latest claimant count data shows a spike in claimants both nationally and in East Anglia. In April 2020, there were 42,200 claimants in East Anglia, representing 4.3% of the working aged population. This spike in claimants in 2020 is largely the result of restrictions placed by the Government on businesses in response to the COVID-19 pandemic (see [Figure 29-4](#)).

Figure 29-4: Claimant Count Rate, January 2013- April 2020



Source: ONS, *Claimant Count*, 2013-2020.

29.2.3.3.1 Earnings

73. Data on (gross) median annual earnings for full-time employees indicates that East Anglia residents earn, on average around £28,300, which is around £2,000 below the national average. The data shows that workplace-based earnings in East Anglia are around £600 below resident-based earnings. Within East Anglia, both resident-based and workplace-based earnings for Norfolk are below the equivalent earnings in Suffolk, with the difference ranging between £1,000-£1,400 per annum).

Table 29.2.10: Resident and workplace median earnings for full-time employees (gross annual), East Anglia 2019

Area	Residence-based earnings (£ per annum)	Workplace-based earnings (£ per annum)
Norfolk	£27,500	£27,300
Suffolk	£28,900	£28,300
East Anglia	£28,300	£27,700
UK	£30,400	£30,400

Source: ONS (2019b).

29.2.3.3.2 Deprivation

74. The Index of Multiple Deprivation (IMD) is the official measure of relative deprivation in England. It combines information from across seven domains (incl. income, employment, education, skills and training, health and disability, crime, barriers to housing and services, and living environment) to produce an overall relative measure of deprivation. **Figure 29-5** shows that there are some areas in East Anglia with some of the highest levels of deprivation seen nationally.
75. Although the average incidence of these areas is less than is seen in England. There are greater concentrated areas of deprivation within Norfolk (in and around Great Yarmouth and Norwich) which have relatively higher levels of deprivation than is seen nationally. In Great Yarmouth a quarter of its lower layer super output areas (LSOAs) are within the 10% most deprived nationally; in Norwich the equivalent proportion is 20%. The employment domain of the IMD follows a similar pattern, with relatively higher deprivation along the North Norfolk coast, and East Anglia’s rural areas.

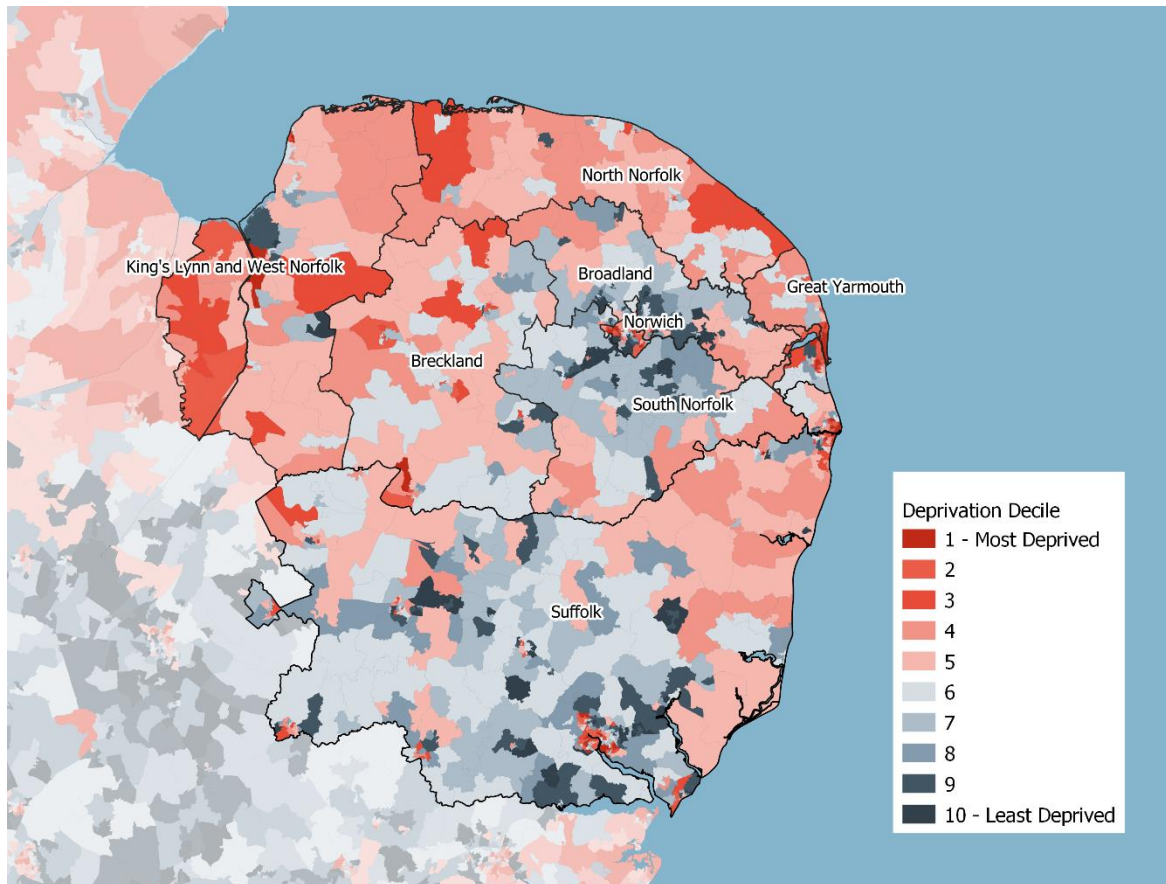
Table 29.2.11: Neighbourhoods in the Highest Decile of Deprivation, 2019

Area	LSOAs in 10% most deprived nationally	Proportion of all LSOAs within area
Norfolk	40	7%
- Great Yarmouth	15	25%
- Norwich	17	20%
Suffolk	22	5%
East Anglia	62	6%
England*	3,284	10%

Source: ONS (2019c).

*Please Note: IMD data is only available for England, not UK or GB level.

Figure 29-5: Map of Deprivation by Decile, 2019



Source: ONS, *Index of Multiple Deprivation*, 2019.

29.2.3.4 Infrastructure

29.2.3.4.1 Road Network

76. There are no Motorways in Norfolk or Suffolk. However there are a number of significant A roads. The A14 is an important east west link, linking the Port of Felixstowe to the motorway network.

29.2.3.4.2 Ports

77. East Anglia has a number of significant working ports, some of which already play a significant role in the construction as well as O&M of offshore wind farms. These include:

- Boston;
- Port of King's Lynn;
- Great Yarmouth;
- Lowestoft;
- Felixstowe;
- Ipswich Dock;
- Harwich; and

- Southwold.

29.2.3.4.3 Major Employment Sites and Enterprise Zones

78. East Anglia is home to two Enterprise Zones (EZ). The Space to Innovate EZ consists of ten sites across East Anglia. This multi-site Enterprise Zone will help to create 18,500 jobs over the next 25-years, 5,000 of which are to be delivered by 2021.
79. The Great Yarmouth and Lowestoft EZ covers six sites in and around Great Yarmouth and Lowestoft, and will focus on growing energy-related businesses and creating high-skilled jobs. The East of England energy sector is expected to see an overall investment in the region of £50 billion. The Great Yarmouth and Lowestoft EZ was established to maximise the opportunities in the sector. The six sites forming the Great Yarmouth and Lowestoft EZ include:
- South Denes, Great Yarmouth;
 - Beacon Park, Great Yarmouth;
 - Mobbs Way, Lowestoft;
 - Riverside Road, Lowestoft;
 - South Lowestoft Industrial Estate; and
 - Ellough Business Park.

29.2.3.5 Social Infrastructure

29.2.3.5.1 Housing

80. Data from the Ministry for Housing, Communities and Local Government (MHCLG) indicates that East Anglia has a total housing stock of 774,000 dwellings. Of these, around 658,000 dwellings (or 85%) are in the private sector, compared with 83% nationally. Norfolk has a total housing stock of around 428,900 units, compared with 345,600 units in Suffolk.

Table 29.2.12: Housing Stock (000s), 2019

		Local Authority	Private Registered Provider	Other Public Sector	Private Sector	Total
Norfolk	No (000s)	20.6	44.8	0.9	362.5	428.9
	%	4.8%	10.4%	0.2%	84.5%	100%
Suffolk	No (000s)	19.0	30.9	0.2	295.5	345.6
	%	5.5%	8.9%	0.0%	85.5%	100%
East Anglia	No (000s)	39.7	75.7	1.1	658.0	774.4

		Local Authority	Private Registered Provider	Other Public Sector	Private Sector	Total
	%	5.1%	9.8%	0.1%	85.0%	100%
England	No (000s)	1,587.2	2,561.0	41.7	20,165.8	24,413.5
	%	6.5%	10.5%	0.2%	82.6%	100%

Source: MHCLG (2019a).

81. The *Norfolk Strategic Planning Framework* (Norfolk County Council, 2018) suggests that between 2015 and 2036, all Norfolk authorities will need to collectively plan for approximately an additional 84,000 homes (or around 4,000 dwellings per annum), many of which are included in adopted Local Plans/ Core Strategies. However, in most parts of the County, housing delivery rates have fallen behind plan targets, which means that in reality authorities in Norfolk will have to deliver around 4,900 each year to address earlier shortfalls.

29.2.3.5.2 Social Infrastructure

82. Social infrastructure exists in various forms, and can include community facilities, sports and leisure facilities, cultural facilities and green infrastructure, in addition to school provision. The North Norfolk District Council's *Infrastructure Position Statement* (2019) outlines the current baseline and future need for social and community infrastructure within the district between 2016-36. The following section outlines the key points relevant to social and community infrastructure for North Norfolk District.

- **Walking and cycling infrastructure** – There is an extensive public rights of way (PRoW) network in the district and ensuring this links well into new development is a key objective.
- **Green infrastructure** – North Norfolk's proportion of households meeting all Accessible Natural Green Space standards (ANGSt) sits below the Norfolk average. This includes at least 2ha open space no more than 300m from home, at least one accessible 20ha site within 2km of home, and one accessible 100ha site within 5km of home.
- **Education** – There are 49 Primary schools (including infant, junior and special schools) and seven secondary schools in North Norfolk. Overall, the district's school population is expected to grow in the next 10-15 years, with the secondary sector currently experiencing an increase in numbers with larger cohorts now leaving the primary sector. Whilst several schools are identified as having limited capacity, the only areas with potential need for a new school and/or the relocation of an existing school are Cramer, Holt and North Walsham.
- **Higher education** – East Anglia is home to two universities – University of East Anglia and Norwich University of the Arts – both located in Norwich. Other universities located nearby include Cambridge University and Anglia Ruskin

University (both in Cambridge), University of Essex (in Colchester), University of Lincoln and Bishop Grosseteste University (both in Lincoln) and University of Hertfordshire (in Hatfield). East Anglia is also home to a number of further/higher education colleges, including the East Coast College with campuses in Great Yarmouth and Lowestoft), City College Norwich and Suffolk New College. These offer a wide range of courses at various levels (ranging from A levels to apprenticeships and higher degree certificates) covering various subjects. This includes level 3 certificates in engineering technologies and further mathematics (at East Coast College), apprenticeships and degrees in engineering and construction and building services (at City College Norwich, and certificates in fabrication and welding engineering (at Suffolk New College). Other specialist colleges include the CITB National Construction College (in King's Lynn), and the Royal College of Nursing (in Bury St. Edmunds).

- **Community facilities** – Community facilities exist in various forms across North Norfolk district, and include village halls, church halls and other facilities. Overall, the supply of community facilities is appropriate, although there may be occasions where developments are asked to contribute towards community facilities.
- **Indoor sport and leisure** – A study commissioned by North Norfolk District Council assessing indoor leisure facilities notes that whilst population will increase substantially (primarily due to a changing demographic profile), the increase in active population will be limited to 2-3% (by 2026). This is not anticipated to increase demand, but may impact on the nature of leisure facilities needed.
- **Leisure** – The *Retail and Main Town Centre Uses Study* (North Norfolk District Council, 2017) identifies theoretical capacity needed to support additional leisure facilities such as health and fitness clubs and other tourism-related (such as 10-pin bowling in Sheringham or Cromer).

29.2.3.5.3 Local Health Infrastructure

83. **Table 29.2.13** below provides an overview of primary healthcare in East Anglia, with 169 GP surgeries serving over 1.7 million registered patients. Data from the NHS (NHS Digital, 2019) indicates that together all GP surgeries in East Anglia support a little under 900 GP FTE, which means that each FTE GP serves around 1,894 patients. This is slightly higher than the benchmark of 1,800 patients per FTE GP set by the Healthy Urban Development Unit (London HUDU, 2019).
84. Within East Anglia, the number of patients per FTE GP ranges from around 1,600 across the North Norfolk Clinical Commissioning Group (CCG) to a little under 2,200 patients per FTE GP across the Ipswich and East Suffolk CCG.

Table 29.2.13: GP Coverage per Clinical Commissioning Group in East Anglia

	GP practices	Registered Patients	GP FTEs	Patients per GP FTE
NHS Great Yarmouth and Waveney	20	240,305	119	2,017
NHS Ipswich and East Suffolk	40	409,300	189	2,169
NHS North Norfolk	19	174,276	110	1,578
NHS Norwich	23	237,414	134	1,767
NHS South Norfolk	23	221,541	120	1,845
NHS West Norfolk	21	176,245	102	1,729
NHS West Suffolk	23	242,098	124	1,960
Total (East Anglia)	169	1.7million	898	1,894

Source: NHS Digital (2019).

85. East Anglia is also home to a number of hospitals, including those shown in **Table 29.2.14**. These provide vital health care services to residents and workers in the LEP area. Of these, Norfolk and Norwich University Hospital, Queen Elizabeth Hospital, West Suffolk Hospital, James Paget University Hospital and Ipswich Hospital provide accident and emergency (A&E) facilities.

Table 29.2.14: Hospitals in East Anglia

Name	Location
Cromer Hospital	Mill Rd, Cromer (NR27 0BQ)
Hellesdon Hospital	Drayton High Rd, Norwich (NR6 5BE)
James Paget University Hospital	Lowestoft Road Gorleston-on-Sea, Great Yarmouth (NR31 6LA)
Norfolk and Norwich University Hospital	Colney Lane, Norwich, Norfolk, (NR4 7UY)

Name	Location
Queen Elizabeth Hospital	Queen Elizabeth Hospital, QE Hospital, Gayton Road, King's Lynn (PE30 4ET)
West Suffolk Hospital	Hardwick Ln, Bury St Edmunds, Bury Saint Edmunds (IP33 2QZ)
Ipswich Hospital	Heath Road, Ipswich (IP4 5PD)
Violet Hill Hospital	Violet Hill Rd, Stowmarket (IP14 1NL)

Source: NHS (2020).

86. A House of Commons Library paper (HoC Library, 2017) sets an overall target for 95% of all attendees at A&E facilities to be seen, discharged, admitted and/ or transferred within four hours of arrival. This standard recognises that for 5% of all patients it may not be clinically appropriate to manage them within four hours of arrival at A&E.
87. Data for February 2020 shows that 82.8% of all A&E patients nationally were discharged, admitted and/ or transferred within the four-hour target time. At the local level, only the East Suffolk and North Essex NHS Foundation Trust (home to the Ipswich Hospital) performed better than the national average (achieving 84.9% of all admissions being seen under four hours), albeit still below the target set. The table below identifies performance at other A&E facilities listed above.
88. Updated data for April 2020 suggests that A&E performance has improved across the board. Please note that this is primarily due to a reduction in accidents as a result of the lockdown implemented nationally in March 2020, rather than a substantial and sudden improvement across the board.

Table 29.2.15: A&E Patients Seen in Under 4 Hours, February and April 2020

Example	Feb 2020	April 2020
Norfolk and Norwich University Hospitals, NHS Foundation Trust	66.8%	78.0%
The Queen Elizabeth Hospital, King's Lynn, NHS Foundation Trust	73.5%	92.7%
West Suffolk NHS Foundation Trust	n/a	n/a
James Paget University Hospitals, NHS Foundation Trust	81.6%	92.4%
East Suffolk and North Essex, NHS Foundation Trust	84.9%	90.6%
England (average)	82.8%	90.4%

Source: NHS (2020).

29.2.3.6 Tourism Baseline Analysis

89. The tourism baseline analysis is primarily desk based, drawing on a range of published datasets and research reports. For the Preliminary Environmental Impact Report (PEIR), the baseline will be supplemented by consultations with relevant local and sub-regional stakeholders in East Anglia.
90. The baseline analysis describes the key tourism-related characteristics of the study area by exploring a range of indicators that are particularly relevant to the selected receptors. The key sources of data used to assess the baseline environment include the policy documents set out in the previous section, relevant national datasets from the ONS providing data on the volume and value of the tourism economy, and additional research published by Visit Britain, Visit Norfolk and other local data sources.
91. The analysis draws on the most up-to-date sources available at May 2020 for all key socio-economic indicators, although the year that the data relates to varies according to the release calendar for each dataset. The baseline year for all socio-economic indicators is referenced throughout the chapter and stated in **Table 29.2.16** below.
92. Please note that at the time of writing (June 2020), the impact of COVID-19 and subsequent lockdown measures implemented to reduce its spread, are yet to be reflected in the data. As such, this baseline document should be treated as a live document that will be updated as and when more information about the impact on the tourism and visitor economy becomes available. That being said, given Norfolk and Suffolk's reliance on tourism, we are of the opinion that East Anglia is likely to be significantly exposed to the adverse impacts associated with COVID-19.

Table 29.2.16: Key Data Sources for Baseline Indicators

Receptor	Indicator	Source	Year Data was Released	Baseline Year of Latest Data
1. Visual impact of offshore infrastructure on tourism activity 2. Impact on volume and value of tourism economy 3. Visual impact of onshore	Employment	ONS, Business Register and Employment Survey	2019	2018
	GVA	ONS Gross Value Added (balanced approach)	2019	2018

Receptor	Indicator	Source	Year Data was Released	Baseline Year of Latest Data
infrastructure on tourism activity	Economic impact of tourism report(s)	Destination Research, Economic Impact of Tourism for Norfolk	2008-18	2018
		Destination Research, Economic Impact of Tourism for North Norfolk	2016-18	2018
		Visit Britain, GB Day Visits Survey		2018
		Visit Britain, GB Tourism Survey		2018
	Business survey	Larkin Gowen, East Anglia Tourism Business Survey		
	Tourism confidence	Visit Norfolk, Tourism Confidence Monitor		2018

93. The baseline analysis includes a review of evidence relating to wind farms and tourism, which will be used to inform the assessment of DEP and SEP on tourism activity and the volume and value of the tourism economy.

29.2.3.6.1 Study area

94. The study area for the tourism baseline assessment is based on the Norfolk boundary, with the rationale being that the onshore cable corridor of DEP and SEP will go through this area. Where available, detailed local data for districts (and/ or localities) within Norfolk is also presented. Furthermore, data for Suffolk, East Anglia (defined as the aggregation of Norfolk and Suffolk counties, corresponding with the area covered by the New Anglia LEP) and the UK (Great Britain or England where UK data is not available) is also presented as wider comparators to provide additional context to the various indicators.

29.2.3.7 Tourism in Norfolk

95. East Anglia has a rich and diverse tourism offer, including the Broads and the heritage coast with its traditional seaside resorts such as Great Yarmouth and Sheringham. Norfolk is an attractive rural and coastal area which supports a thriving tourism industry and provides a valuable leisure and recreation resource for residents and visitors alike.

96. The Norfolk coast is characterised by a number of attractive seaside towns, with fine beaches and many tourist attractions. Further inland, Norfolk is home to a number of unique natural assets, attracting activities such as cycling, walking and heritage tourism.

29.2.3.7.1 Tourism Economy in Norfolk

97. Tourism is estimated to support 53,000 FTE jobs across East Anglia (9% of total FTE jobs). Please note that the definition of the tourism sector is based on Standard Industrial Classification SIC (codes) defined by the United Nations World Tourism Organization (UNWTO) for tourism industries. This definition is broader than the definition of the accommodation and food services sector but not as broad as the definition used by Visit Norfolk.

98. Around 29,000 FTE jobs are in Norfolk and the rest (ie. around 23,000 FTE jobs) are in Suffolk. Within Norfolk, 22,000 tourism jobs are based outside of Norwich. The tourism sector supports around a tenth of all employment locally, which is slightly higher than the national average. Within Norfolk, Great Yarmouth (with 5,300 FTE jobs) and North Norfolk (with 4,400 FTE jobs) have relatively high levels of concentrations of employment in tourism (with LQ of 2.0 and 1.9 respectively when compared with the national average).

Table 29.2.17: Tourism FTE Employment, 2018

	Full Time Jobs (000s)	Part Time Jobs (000s)	FTEs (000s)	% of Total FTEs	LQ vs GB
Norfolk	17.0	24.0	29.0	10%	1.1
Norfolk excluding Norwich	13.0	18.0	22.0	10%	1.1
- Great Yarmouth	3.2	4.3	5.3	18%	2.0
- North Norfolk	2.6	3.6	4.4	17%	1.9

	Full Time Jobs (000s)	Part Time Jobs (000s)	FTEs (000s)	% of Total FTEs	LQ vs GB
- Norwich	4.4	5.3	7.1	9%	1.0
Suffolk	14.0	19.0	23.0	9%	1.0
East Anglia	32.0	43.0	53.0	9%	1.0
Great Britain	1,544.0	1,633.0	2,360.0	9%	1.0

Source: ONS (2018a).

Numbers are rounded to nearest 1,000.

99. Research by Destination Research (2018) provides information on the volume and value of the visitor economy, as well as the characteristics of tourism in Norfolk and more specifically North Norfolk. The main sources of information are the *GB Day Visits Survey* (Visit Britain, 2019b) and the *GB Tourism Survey* (Visit Britain, 2019a), which collect information on day and overnight visitors.
100. Tourism data on volume and value shows that in 2018 there were 50.9 million visits to Norfolk, injecting around £2.37 billion of visitor expenditure into the local economy. The majority of trips to Norfolk (ie. 47.8 million or 94%) are day visits, injecting around £1.59 billion into the local economy. Whilst overnight visits represent only 6% of total visits to Norfolk, in 2018 these led to an overall injection of £740 million (or around 31% of total visitor expenditure).
101. Since 2008, the overall volume of visits to Norfolk increased by around 21.5 million visits (or +73%), whilst the overall visitor injection increased by £685 million (or +41%). The data below indicates that whilst the number of day visits increased substantially (from 25.5 million to 47.8 million or +88%), the number of overnight visits declined by almost a quarter from 4.0 million to 3.1 million. On average, it is estimated that each visit (ie. day and overnight) to Norfolk in 2018 generated an injection of £46.60, compared with £57.20 per visit in 2018. Please note that this varies depending on length of visit, and is explored in more detail below.

Table 29.2.18: Volume and Value of Tourism, Norfolk, 2008-18

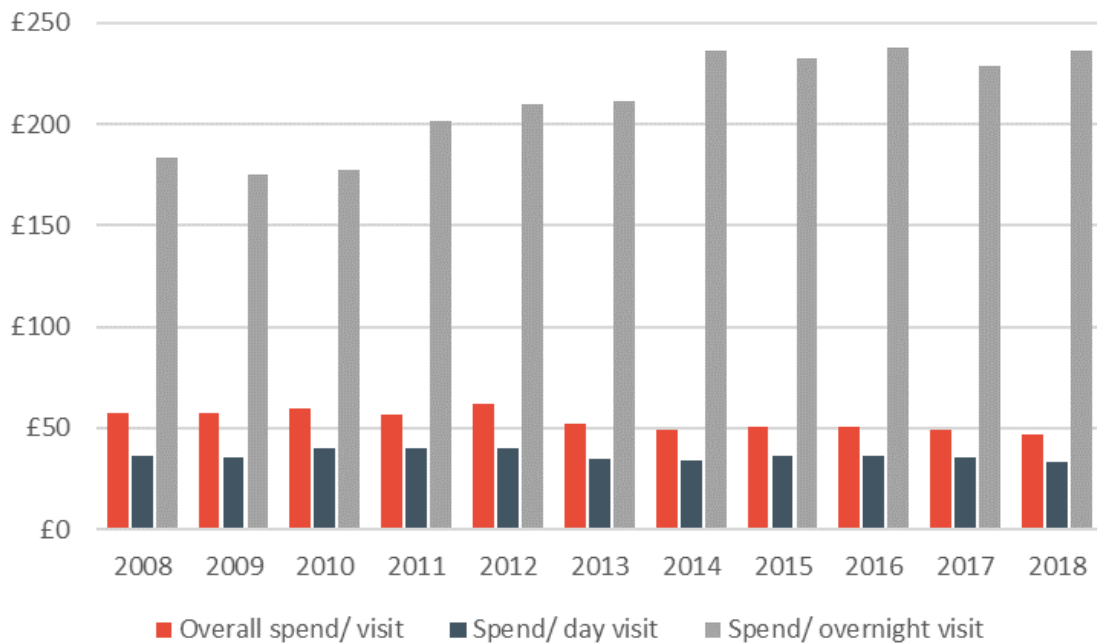
	Day Visits		Overnight Tourism	
	Visits (m)	Expenditure (£m)	Visits (m)	Expenditure (£m)
2008	25.5	£916	4.0	£731
2009	26.7	£955	4.3	£755
2010	27.3	£1,100	4.0	£705
2011	31.2	£1,242	3.4	£686
2012	30.1	£1,207	3.4	£709
2013	36.1	£1,265	3.0	£642

	Day Visits		Overnight Tourism	
	Visits (m)	Expenditure (£m)	Visits (m)	Expenditure (£m)
2014	40.0	£1,360	3.0	£712
2015	39.7	£1,425	3.1	£718
2016	41.0	£1,488	3.1	£727
2017	43.4	£1,531	3.3	£748
2018	47.8	£1,595	3.1	£740

Source: Destination Research (2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018).

102. As evidenced above, 2018 saw 27.8 million day visits, generating an overall injection of £1.58 billion to the Norfolk economy. Spend per day visit across Norfolk in 2018 was £33.40 compared with £36.00 in 2008, which represents a fall of around £2.60 per visit. However, whilst the average spend per visit fell, the overall number of day visits across Norfolk increased substantially between 2008-18, with 2018 seeing 22.3 million additional visits per year.
103. The evidence presented above indicates that in 2018, there were around 3.1 million overnight visits injecting £740 million into the Norfolk economy. Whilst the number of overnight visits has declined by around a fifth (-21%) since 2008, overnight visitor expenditure increased slightly (+1%) over the same period. This is primarily the result of longer trips (4.01 nights in 2018, compared with 3.79 nights in 2008) in addition to an increased spend per night (£58.90/ night in 2018, compared with £48.50/ night in 2008). Finally, the average spend per trip in 2018 stood £236.50, compared with £183.60 in 2008.

Figure 29-6: Average spend per visit, day trips and overnight trips to Norfolk, 2008-18



Source: Destination Research (2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018).

104. Further analysis into overnight visit reveals that, in 2018 Norfolk, holiday visits made up the largest share of overnight visitors (around 2.2 million visits) and generate the largest share of overnight visitor expenditure (of £540 million or around 75% of all overnight tourism expenditure in 2018).

Table 29.2.19: Tourism Volume and Value by Visit Type, North Norfolk, 2018

	Holiday		Visiting friends and relatives		Business visitors	
	Visits (m)	Exp. (£m)	Visits (m)	Exp. (£m)	Visits (m)	Exp. (£m)
Norfolk	2.2	£540	0.6	£105	0.2	£72
North Norfolk	0.4	£115	0.1	£14	0.1	£7

Source: Destination Research (2018, 2018).

105. North Norfolk district saw around 9.6 million visits generating an overall injection of £421 million in 2018. Of these, a little over 9.0 million were day trips, and the rest (around 0.6 million) were overnight trips. Overall this is a similar share of day trips to overnight stays as seen throughout Norfolk.

106. Data for 2018 indicates that overnight stays in North Norfolk generate £138 million to the local economy, representing around a third of all visitor expenditure locally. North Norfolk punches above its weight when it comes to the overall value of expenditure generated by overnight stays (of 33%, compared with 31% across Norfolk). This is partly the result of longer overnight trips to North Norfolk (of 4.22 nights, compared with 4.01 nights across Norfolk), and lower spend per trip for day visits (of £43.90 per visit, compared with £46.60 per visit across Norfolk) for 2018.
107. Day trips (9.0 million) to North Norfolk make up 94% of all trips in 2018, and contribute an overall £280 million to the local economy. In total, it is estimated that around one-in-five of all-day trips in Norfolk are in North Norfolk. Whilst this suggests that North Norfolk may be punching above its weight in terms of visitor numbers attracted, the average spend per day-visitor in North Norfolk (of £31.10) is below the Norfolk average (of £33.40).
108. The analysis of long-term trends for North Norfolk district is limited as economic impact estimates are only available only for 2016 (Destination Research, 2016), 2017 (Destination Research, 2017b) and 2018 (Destination Research, 2018b). The analysis for short term changes in visitor trends in North Norfolk district suggests that between 2016-18, the number of overnight stays increased by 31,200 (or +6%). This increase is around three-times the increase in overnight trips seen throughout Norfolk (+2%) and represents around 43% of the overall increase in overnight trips to Norfolk (of +72,000) between 2016-18.
109. **Table 29.2.19** shows that around 0.4 million (or 82%) of North Norfolk district's overnight visits were for holidays, with the rest (ie. 0.2 million) being evenly split between visits to friends and relatives and business visits. Overnight holiday visits to North Norfolk district injected £115 million into the local economy, which represents 88% of total overnight visitor expenditure. It is estimated that visits to friends and relatives generated an expenditure in the region of £14 million, whilst business visits injected a further £7 million into the North Norfolk district economy.
110. Since 2016, North Norfolk has seen an additional 1.3 million annual day trips, representing an increase of 16%. This was in line with the overall increase seen across Norfolk. Furthermore, similar to the wider trend across Norfolk, the share of day trips (as a proportion of total visits) in North Norfolk has increased by around one percentage point between 2016-18. Reflecting wider trends, the average spend per visit in North Norfolk has fallen by around £2.60 (compared with £2.90 across Norfolk). Despite this, the overall injection by day visitors increased by around £19 million since 2016 (or +7%).

29.2.3.7.2 *Tourism Business Confidence*

111. Visit Norfolk produces Business Confidence data on a quarterly basis. The latest (pre-COVID-19) data shows that the vast majority of visitor attraction and accommodation businesses are very or fairly confident, with more than a quarter stating they are very confident.

Table 29.2.20: Business Confidence data

	Accommodation		Attractions	
	Very confident	Very / Fairly Confident	Very Confident	Very / Fairly Confident
Business Confidence	27%	84%	27%	92%

Source: Tourism Business Monitor (2018).

112. However, the unprecedented impacts of COVID-19 has significantly impacted business confidence levels. An online tourism business survey for the East of England (Destination Research, 2020) revealed that many tourism businesses are expecting to achieve a lower turnover for 2020-21, with four out of five businesses closed temporarily and many staff furloughed under the Coronavirus Job Retention Scheme.
113. Smaller proportions of businesses implemented other contingency measures (flexible working, product diversification, etc.) in order to mitigate the impact of COVID-19 on their business. In terms of bookings, over half of tourism businesses experienced widespread booking cancellations. One in five businesses report high levels of requests for refunds. Just under a third said most of their bookings have been postponed to a future date. Immediate effects of COVID-19 include deferring or cancelling planned investments, developments and renovations and reducing expense levels to prevent ‘unnecessary’ spending.

29.2.3.7.3 Nature of Tourism Offer in Norfolk

114. Norfolk has a number of attractions bringing in over 100,000 visits per year. The most popular of these is Banham Zoo in Breckland which brings in over 200,000 visitors per year.

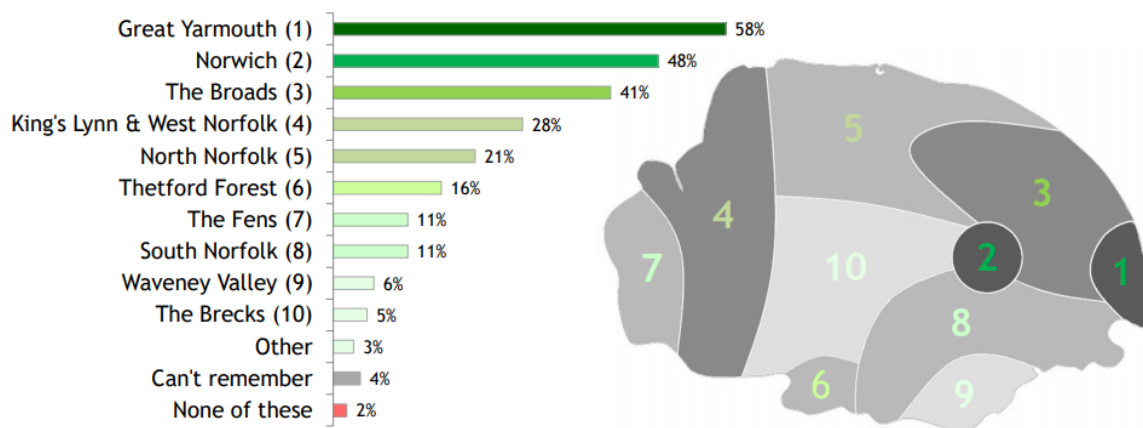
Table 29.2.21: Visitor Attractions in Norfolk which attract over 100,000 of Visitors in 2018

Attraction	No. of Visitors	District
Banham Zoo	205,911	Breckland
Norwich Castle Museum and Art Gallery	199,449	Norwich
Blickling Hall, Gardens and Park	190,960	Broadland
Wroxham Barns	190,000	North Norfolk
BeWILDerwood	160,000	North Norfolk
The Poppy Line (North Norfolk Railway)	153,701	North Norfolk
Felbrigg Hall, Garden and Park	118,907	North Norfolk

Source: Visit Britain, (2018).

115. A study for Visit Norfolk (Insight Track, 2019) found that many visitors visit Norfolk for leisure purposes, with the main reasons to visit being, history/ heritage, nature/ wildlife watching and walking/ hiking. The most popular area to visit for leisure is Great Yarmouth. People often visit for a one-week holiday or longer (45% of survey respondents).

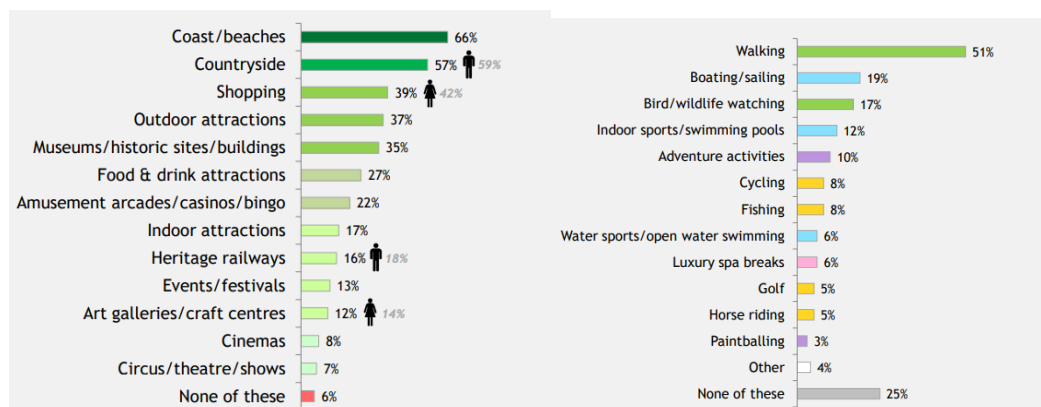
Figure 29-7: Areas of Norfolk visited for leisure



Source: Insight Track (2019).

116. The natural environment appears to be the most 'visited' amenity in Norfolk with the coastal beaches and countryside the top two from the prompted list. Shopping is also a major draw; with outdoor attractions and museums/ historic sites/ buildings also popular. Walking is the most popular activity with half of survey respondent engaging in this activity.

Figure 29-8: Visiting attractions and activities done

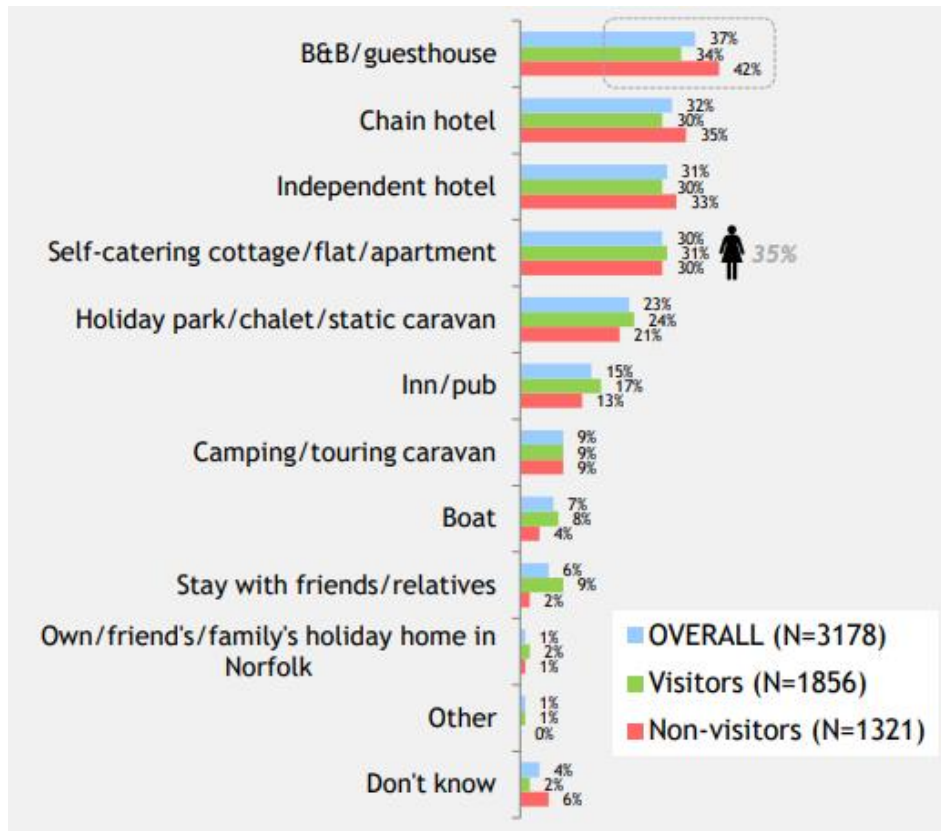


Source: Insight Track (2019).

29.2.3.7.4 Nature of Accommodation

117. Visitors are more likely to visit between May to September, with bed and breakfast (B&B) and/ or guesthouses being the most popular choice of accommodation. Hotels (chain or independent) are also notable mentions, with chain hotels also significantly more likely to be mentioned by non-visitors.

Figure 29-9: Accommodation likely to stay in



Source: Source: Insight Track (2019).

29.2.3.7.5 Assets in North Norfolk, Broadland and South Norfolk

118. As the onshore cable corridor of DEP and SEP is planned to run through the districts of North Norfolk, Broadland and South Norfolk, the baseline analysis has also undertaken a review of the key visitor and tourism assets located within each district.

119. Many visitors to North Norfolk District visit to enjoy the Norfolk Coast area of outstanding natural beauty (AONB), its beaches, coastal birdlife, the Broads and the character and tranquillity of the open countryside. North Norfolk's many seaside towns contain many attractions and act as a focus for visitors and accommodation, particularly around Cromer and Sheringham. Sheringham, in particular attracts visitors throughout the year, on day trips, short breaks and longer stays and has a range of accommodation from high quality hotels to budget self-catering accommodation.

120. The *North Norfolk Core Strategy* (North Norfolk District Council, 2008) identifies four asset zones of relevance to the visitor economy, and include:

- Resorts and hinterlands – Cromer, Sheringham and Mundesley;
- Rural – Fakenham, North Walsham and Stalham;
- The Broads and their setting; and
- Coastal – Wells-next-the-Sea.

121. The Norfolk Broads National Park is Britain's largest protected wetland and an important tourist attraction for activities such as wildlife spotting, boating and scenic walks.
122. The Norfolk Coast Partnership (2020) lists around 380 individual tourism assets along the Norfolk coastal area, and splits them across the following categories:
- Beaches;
 - Family friendly sites;
 - Cycle routes;
 - Eating out;
 - Farmers' markets
 - Horse riding
 - Historic sites;
 - Hotels and accommodation;
 - Local food producers;
 - Local shops;
 - Museums;
 - Nature focus;
 - Tourist information;
 - Walks; and
 - AONB office.
123. A similar list provided by the Norfolk Community Directory (Norfolk County Council, 2020) lists around 200 assets within Norfolk, including:
- Libraries, galleries and museums – eg. Tide and Time Museum and Gressenhall Farm and Workhouse Museum of Norfolk Life;
 - Music and dancing venues;
 - Outdoor activities – eg. Christal Seas Scuba, Eaton Park Crazy Golf and Putting, and Mid-Norfolk Railway;
 - Sports and exercise; and
 - Theatre and films.

29.2.3.8 Landfall and Onshore Cable Corridor and Tourism Activity

124. DEP and SEP are both anticipated to make landfall to the west of Sheringham, close to Weybourne. The following section provides an overview of the key tourism assets located within a 1km from the PEIR boundary at landfall. Where available, information about each resource's level of use (incl. visitor numbers) is included in the description.

125. The cable makes landfall close to Weybourne, which is a small village with a population of just over 500 residents. The landfall area is characterized by a shingle beach, called Weybourne Beach, which is less suitable for bathers but is popular with anglers and dog walkers. The beach has a car park and is easily accessible to the public. To the east of the car park there is a sea cliff that runs along the coast. Old Coastguards Cottages sit on the top of the sea cliff. To the west of the car park is Kelling beach wreck area sea fishing venue and Weybourne Atmospheric Observatory. The Norfolk Coast path stretches along the coastline and on top of the cliff.

Table 29.2.22: Resources within 1km of Proposed Landfall Location

Resource	Location	Description
Norfolk/ England Coastal Path	Norfolk Coast - Weybourne	The Norfolk coastal path is part of the new National Trail around the English Coast. The section from Sea Palling to Weybourne can be accessed from the car park on Beach Lane in Weybourne. Level of use: Norfolk Coastal Path has many visitors with around 47,000 visitors in January and peaking at 64,000 visitors in August.
Muckleburgh Hill	Weybourne	Significant 21 hectare remnant heathland falling within the North Norfolk AONB, lying less than a kilometre from the coast, in close proximity to several Sites of Special Scientific Interest (SSSI).
The Muckleburgh Military Collection	Weybourne Camp A149 The Street Weybourne, Holt	Muckleburgh Military Collection is sited on the former Royal Artillery Anti-Aircraft training camp at Weybourne. It has the largest privately owned collection of tanks, armoured cars and other military vehicles used in wars across the globe. Number of visitors: 38,000 visitors per year.
Foxhills Campsite	Foxhills, Weybourne, Holt	Campsite with 20 large pitches and open space.

126. DEP and SEP will have of a single onshore cable corridor that will be connected to the National Grid at the existing Norwich Main substation in Norfolk. The onshore cable corridor boundary follows a north-south direction, passing by Weybourne, Baconsthorpe, Cawston, Attlebridge, Hethersett, Ketteringham and to the two preferred subway station sites close to the existing Norwich Main Substation. This section provides an overview of the key tourism assets located within a 1km buffer from the PEIR boundary. Where available, information about each resource's level of use (incl. visitor numbers) is included in the description.

Table 29.2.23 Resources within 1km of the Onshore Cable Corridor

Resource	Location	Approximate Distance from cable corridor	Description
The North Norfolk Steam Railway – Weybourne Railway station	Weybourne	Within Proposed cable corridor area	North Norfolk Railway, which runs from Sheringham through Weybourne to Holt. Also known as the 'Poppy Line', is a well-preserved steam railway passing through a carefully preserved country station at Weybourne, which houses a locomotive shed with a carriage maintenance and restoration centre. The railway offers a 10.5-mile round trip by steam train / vintage diesel trains, through an area of North Norfolk designated as being of outstanding natural beauty. Number of Passengers: Approximately 166,000 visitors per year (in 2015).
Kelling Heath	Between Holt and Weybourne	Within Proposed cable corridor area	Kelling Heath is designated as a SSSI covering approximately 90 ha. Kelling Heath provides an excellent example of a glacial outwash plain and oceanic heathland.
Kelling Heath Holiday Park	Weybourne Road, Holt	Within Proposed cable corridor area	Kelling Heath Holiday Park, offers accommodation in woodland lodges, luxury holiday homes and homes for those with limited mobility, together with touring and camping facilities
Baconsthorpe castle	Castle Lane, Baconsthorpe, Holt	650m from proposed cable corridor area	Baconsthorpe Castle is a Scheduled Monument Protected under UK law as a Grade I and Grade II listed building.
Marriots Way	Between Norwich and Aylsham	Within Proposed cable corridor area	The Marriott's Way is a long-distance footpath, cycle-path and bridleway between Norwich and Aylsham, Norfolk, England. It forms part of the National Cycle Network and the red route of Norwich's Pedalways cycle path network. The path crosses the onshore cable route near Attlebridge.

Resource	Location	Approximate Distance from cable corridor	Description
Sheringham Park	Visitor Centre, Wood Farm, Sheringham NR26 8TL	450m from proposed cable corridor area	Sheringham Park is a landscape park and gardens near the town of Sheringham and contains Sheringham hall and a visitor centre. The hall is privately occupied, but Sheringham Park is in the care of the National Trust and open to visitors.
Royal Norwich Golf Club	The Weston Estate Weston Hall Road, Norwich	500m from proposed cable corridor area	18-hole golf course and 6-hole academy course, along with practice facilities. Recently opened by Ian Poulter.
Imagine Spa Park Farm Hethersett	Park Farm Hotel, Hethersett, Norwich	150m from proposed cable corridor area	Offering Spa services.
Ketteringham Hall	Church Rd, Ketteringham, Wymondham	300m from proposed cable corridor area	Its origins date back to the 15th century More recently the hall was home to Group Lotus after their founder, bought the estate in 1970. The hall has now been redeveloped into business units and is occupied by several companies. Ketteringham Hall is surrounded by an estate of 40 acres of woodland and open grassland and is documented to have existed during the time of Edward the Confessor (1004-1066).

29.2.3.9 Tourism Perceptions of Wind Farms

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

29.2.3.9.1 Ex-Ante Research

128. The ex-ante research covers a group of studies which have been carried out to ascertain and/ or explore potential reactions to wind farm developments. This group makes up the majority of the research base, and includes both scheme-specific studies, which tend to focus on impacts on a highly localised area, as well as larger area assessments, which consider the cumulative effect that wind farm developments across a larger impact area could have on tourism activity.

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

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

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

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

29.2.3.9.2 Ex-Post Research

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

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

29.2.3.9.3 *Wider Research*

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

- **Studies which provide secondary analysis of the evidence base** (such as McGowan and Sauter (2005) and The Tourism Company (2012)) – Whilst some of these evaluations are helpful, there are many which draw selectively on the available evidence and, as a result may not provide a full assessment of the evidence.
- **Studies from overseas** (such as North Carolina State University (2016)) - A slightly greater evidence base of studies has emerged from countries where the offshore wind sector has been established for longer. This includes both ex-ante and ex-post research.
- **General perceptions-based studies** (such as RCUK (2009) and Soini *et al.* (2011)) – Exploring attitudes towards wind farms and associated infrastructure in general (ie. not in connection to a specific development and/ or proposal).
- **General tourism surveys** (such as Failte Ireland (2012) and Cardiff City and County Council (2012)) – Which explore what tourists value about a particular tourism destination and factors which enhance or detract from their experience.

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

29.2.3.9.4 *Impact on Tourism*

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

137. Whilst the research points towards potential for some visitors to be discouraged from making future visits to an area affected by a wind farm development, this is usually balanced (and in some cases exceeded) by visitors reporting that they will visit more frequently. This conclusion is reinforced by research studies (such as Gossop (2007) and BiGGar Economics (2008)) which have assessed the impacts post development, pointing towards there being no evidence of significant lasting impact of wind farm development and operation (either positive or negative) on tourism.
138. The research also points that visitors and tourism-related businesses recognise the potential for positive impacts associated with extra expenditure within the sector and local economy arising from the construction activity, or in some instances the additional interest in the seeing of the development.
139. Finally, the research also typically focusses on measuring opinions of what the impacts on the visitor economy could be prior to implementation of the scheme, with research being undertaken with a mix of visitors, tourism businesses, local residents and other stakeholders. However, there are few ex-post empirical studies identifying negative impacts on local visitor economies post-completion. A study by Glasgow Caledonian University (2008) suggests that even where there have been negative effects, these often occur in the form of displaced tourism with visitors diverting to neighbouring areas.
140. There are a complex range of factors which explain the attitudes of visitors to wind farm development and the consequences upon visiting behaviour. There is a need to be cautious in generalising but the evidence base (see for example Devine-Wright, 2007) points towards a tendency for younger people and those in higher socio-economic groups to be more accepting of wind farm development, in part influenced by their wider attitudes towards renewable energy and its role in addressing climate change.
141. A survey by Ipsos MORI (2014) of around 1,750 UK adults found that 76% of people surveyed, who had heard of wind farms supported their development. Although this report did not specifically survey tourists, it is still indicative of a generally positive outlook towards the construction of wind farms, whereby visiting areas with such an infrastructure should not deter most people from visiting.
142. The research base does not suggest that the extent to which tourists are attracted to an area by the quality of the landscape is important in determining visitors' reactions to wind farm developments. In addition, the research also states that visitors and tourism-related businesses usually recognise the potential for positive impacts associated with the extra expenditure in the sector, and the local economy arising from construction activity (or in some instances the additional interest in visiting the development).
143. Research by the Prof. Cara Aitchison at the University of Edinburgh on behalf of the Scottish Government's Renewables Inquiry (Aitchison, 2012) concluded by saying that '*the findings from both primary and secondary research relating to the actual and potential tourism impact of wind farms indicates that there will be neither an overall decline in the number of tourists visiting an area, nor any overall financial loss in tourism-related earnings as a result of a wind farm development*'.

144. The literature does however indicate that wind farm developments will not have a significant effect on the overall volume and value of tourism activity in most instances. Various studies (such as University of the West of England (2004); Ipsos MORI (2014) and Glasgow Caledonian University (2008)) suggest that the majority of visitors do not expect their behaviour to be influenced (either positively or negatively) by the presence of wind farm developments.
145. Overall, the evidence outlined above suggests that offshore wind farm developments generate very limited, or no negative impact on tourist and recreational users during the construction and O&M phases.

29.2.3.9.5 Visibility of the Offshore Infrastructure

146. SEP and DEP theoretical zones of visibility (ie. the area where the offshore wind farm is theoretically visible from) are based on analyses drawn from **Chapter 27 Seascape, Landscape and Visual**. In theory, these zones stretch well inland into Norfolk, making DEP and SEP theoretically visible from a few areas to the South of Norwich. In reality, DEP and SEP will not be visible from inland locations (ie. beyond the Norfolk coast) due to obstructed sight lines. **Table 29.2.24** below shows a list of tourism assets located within the zone of visibility that are not already mentioned in **Table 29.2.22** & **Table 29.2.23** above.

Table 29.2.24: Resources located within Zone of Theoretical Visibility of Offshore Infrastructure

Resource	Description
Bewilderwood	Bewilderwood is an adventure park for families located in Horning. Level of use: 160,000 visitors (2018)
Blicking Estate	Blickling Hall is a stately home which is part of the Blickling estate. It is located in the village of Blickling north of Aylsham. Level of use: 191,000 visitors (2018)
Pensthorpe Natural Park	700-acre nature reserve & woodland conservation park, with interactive trails & eco play areas.
Blakeney National Nature Reserve	Blakeney Point is a National Nature Reserve situated near to the villages of Blakeney, Morston and Cley.
Thursford	The Thursford Collection is a museum located in Thursford.
Houghton Hall & Gardens	Lavish mansion built for Britain's first Prime Minister and housing a collection of model soldiers.
Bure Valley Railway	The Bure Valley Railway is a 15 in minimum gauge heritage railway in Norfolk. The railway runs from Wroxham to Aylsham and is Norfolk's longest railway of less than standard gauge. Level of Use: Over 100,000 visitors per year
Amazona Zoo	Unique zoo featuring over 200 South American animals, plus an indoor play area, cafe & gift shop.
Cromer Beach	Cromer is a traditional Victorian seaside resort, with a sand and shingle beach popular for swimming and surfing.

Resource	Description
Fairhaven Woodland and Water Garden	Wildlife and woodland gardens including a private waterway, with daily boat trips from Apr-Oct.
Thrigby Hall Wildlife Gardens	Gardens home to a variety of animals, small zoo animal encounters plus treetop and tunnel walks. Level of use: Average 65,000 visitors per year
Wroxham Barns	Leisure and shopping complex with boutiques, craft studios, a kids' farm, funfair and restaurant. Level of use: 190,000 visitors (2018)
East Ruston Old Vicarage Garden	East Ruston Old Vicarage Gardens is a notable privately-owned garden.
Cley Marshes Visitor Centre	Nature reserve's visitor centre with a cafe, a shop and panoramic views of surrounding marshes. Level of use: 110,000 visitors
Hickling Broad	Hickling Broad is a 600-hectare (1,500-acre) nature reserve.
Old Hunstanton Beach	A popular sandy beach backed by cliffs and dunes. Old Hunstanton beach is just outside Hunstanton town to the north.
Brancaster Estate & Beach	Brancaster Estate on the north norfolk coast encompasses a beach, a busy harbour and a roman fort site Branodunum.
Blakeney Point Seal Trips Ptarmigan	Blakeney Point Seal Trips to the Seals and Birds with Beans Boats, daily from Morston Quay.
Holt Country Park	Holt Country Park is set in 100 acres of mixed woodland and is a Green Flag award winner.
Holkham Bay	Holkham Bay. The beach at Holkham is a sweeping cove that is 4 miles in length; its pure white sands and rolling sand dunes are a huge attraction. Level of use: Over 100,000 visitors a year
Sheringham Beach	Pebble beach close to the town of Sheringham.
St. Benet's Abbey	Ruins of a Benedictine abbey on the banks of the River Bure, near Ludham.
Horsey Gap / Dunes	Horsey Dunes is an extensive dune system on the east coast of Norfolk, England. It is owned by the National Trust and is within the Norfolk Coast AONB. It is sometimes known as Horsey Gap. The site is notable for a large colony of grey seals which breed there each winter. Level of use: Over 70,000 people go to Horsey to see the seals between November and January
How Hill Trust - The Environmental Study Centre for the Norfolk Broads	How Hill House is located within the grounds of the Broads National Park and houses the Norfolk Broads Study Centre, an independent charitable organisation which runs residential environmental courses for groups of schoolchildren.

Resource	Description
Ranworth Broad	Ranworth Broad is a 136-hectare nature reserve on the Norfolk Broads north-east of Norwich in Norfolk
RAF Air Defence Radar Museum	The Royal Air Force Air Defence Radar Museum is a museum on the site of the former Royal Air Force radar and control base RAF Neatishead, close to the village of Horning in Norfolk, England Level of use: 6,000
Happisburgh Lighthouse	Happisburgh Lighthouse in Happisburgh on the North Norfolk coast is the only independently operated lighthouse in Great Britain. It is also the oldest working lighthouse in East Anglia.
Cromer Museum	Victorian fisherman's cottage housing exhibits about Cromer's ancient & modern history. Level of use: 14,000 (2016/17)
RNLI Henry Blogg Museum	The Henry Blogg Museum celebrates the most decorated lifeboatman in RNLI history, who served for 53 years on Cromer's lifeboats Level of use: 51,000
City of Norwich Aviation Museum	City of Norwich Aviation Museum is a volunteer run museum and charitable trust dedicated to the preservation of the aviation history of the county of Norfolk, England.
Walsingham Abbey	Ruins of the famous Augustinian Priory.
Sheringham Museum	Sheringham Museum at the Mo is a museum in the town of Sheringham, Norfolk, England.
Wells and Walsingham Light Railway	The Wells and Walsingham Light Railway is a 10 ¼ in gauge heritage railway in Norfolk, England running between the coastal town of Wells-next-the-Sea and the inland village of Walsingham.
Scolt Head Island National Nature Reserve	Scolt Head Island is an offshore barrier island between Brancaster and Wells-next-the-Sea in north Norfolk. It is in the parish of Burnham Norton and is accessed by a seasonal ferry from the village of Overy Staithe.
RSPB Frampton Marsh	Frampton Marsh is a nature reserve in Lincolnshire, England. The reserve is situated on the coast of The Wash, some 4 miles from the town of Boston, between the outfalls of the Rivers Welland and Witham, and near the village of Frampton.
Gibraltar Point National Nature Reserve	Gibraltar Point national nature reserve is an area of about 4.3 km ² on the coast of Lincolnshire, England. The reserve is owned by Lincolnshire County Council and East Lindsey District Council and is administered by the Lincolnshire Wildlife Trust.
Skegness Pleasure Beach Fairground	Outdoor recreation park with roller coasters, classic rides & bowling, plus snack stands & shops. Level of use: 600,000 visitors (2018)

Resource	Description
Skegness Clock Tower	This historic structure features nighttime spotlights & string light decorations during holidays.
Skegness (Beach)	Skegness is a Sandy beach located near Skegness
Skegness Pier	Famous landmark with coastal views, an amusement arcade, ice cream, bowling and a laserquest centre.
Natureland Seal Sanctuary	Natureland Seal Sanctuary, also referred to as Skegness Natureland or Skegness Seal Sanctuary is an animal attraction in Skegness Level of use: 93,000 visitors (2018)
Fantasy Island	Fantasy Island is a family amusement park in Ingoldmells on the East Coast of England. Opened in 1993, it sits in a busy spread of holiday parks. Level of use: 40,000 visitors (2014)
Ingoldmells Beach	Ingoldmells Beach at Skegness in Lincolnshire is an RNLI lifeguarded beach.
Moggs Eye	Moggs Eye or (Huttoft) is a Sandy beach located near Mablethorpe in Lincolnshire.Dogs are allowed on the beach all year round.
Radcliffe Donkey Sanctuary	Donkey Sanctuary in Huttoft, Lincolnshire
Lincolnshire Aquapark and Watersports Lake	Total Wipeout-style aqua park with watersport lake.
Mablethorpe Beach	The sandy beach offers a range of activities. Beach chalets are available to hire.
The Seal Sanctuary Wildlife Centre	The Mablethorpe Seal Sanctuary and Wildlife Centre is a family friendly visitor attraction featuring primates, reptiles, birds, seals and much more.
Saltfleetby-Theddlethorpe Dunes National Nature Reserve	Saltfleetby-Theddlethorpe Dunes is a national nature reserve on the coast of Lincolnshire, England, in the parishes of Saltfleetby and Theddlethorpe. It is managed in part by Natural England; in part by the Lincolnshire Wildlife Trust, and consists of 1,377 acres of sand dunes, salt marsh, sand and mudflats. Level of use: 290,000 visitors
Rushmoor Farm Park & Falconry Centre	Rushmoor Farm Park and Falconry Centre is a small family farm park. They have a variety of farm animals, birds of prey and small animals.
National Trust - Gunby Estate, Hall and Gardens	National Trust's Gunby Hall and Gardens is a 18th-century house with Victorian gardens located in Lincolnshire.
Lincolnshire Wolds AONB	Lincolnshire Wolds are a range of hills in the county of Lincolnshire, England which run roughly parallel with the North Sea coast, from the Humber Estuary in the north-west to the edge of the Lincolnshire Fens in the south-east.

Resource	Description
Spurn Point	<p>Spurn is an internationally important nature reserve with sensitive, diverse and wildlife-rich habitats. Large numbers of people travel to Spurn every year to enjoy its unique landscape, heritage and wildlife.</p> <p>Level of use: 40,000 visitors to the visitor centre (2013)</p>
Kilnsea Wetlands	<p>Kilnsea Wetlands is a nature reserve run by Yorkshire Wildlife Trust.</p>

29.2.4 References

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