

XLINKS MOROCCO-UK POWER PROJECT

Preliminary Environmental Information Report

Volume 4, Chapter 3: Socio-economics and Tourism



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Glossary

Term	Meaning
Applicant	Xlinks 1 Limited.
Baseline	The status of the environment at the time of assessment without the development in place.
Effect	Term used to express the consequences of an impact. The significance of an effect is determined by correlating the magnitude of an impact with the sensitivity of a receptor, in accordance with defined significance criteria.
Environmental Impact Assessment	The process of identifying and assessing the significant effects likely to arise from a project. This requires consideration of the likely changes to the environment, where these arise as a consequence of a project, through comparison with the existing and projected future baseline conditions.
Direct Impact	Economic impact associated with the activity of primary contractors involved in the development, construction and operations and maintenance of Xlinks Morocco-UK Power Project.
Gross Value Added	Measures the contribution to the economy of each individual producer, industry or sector.
HVAC Cables	The High Voltage Alternating Current cables which would bring electricity from the converter stations to the new Alverdiscott Substation Connection Development.
HVDC Cables	The High Voltage Direct Current cables which would bring electricity to the converter stations from its generation source.
Indirect Impact	Economic impact associated with the spending taking place across the supply chain of those businesses involved in the development, construction and operations of Xlinks Morocco-UK Power Project.
Induced Impact	Economic impact associated with the spending across the economy of those workers involved in the development, construction and operations of Xlinks Morocco-UK Power Project.
Jobs	A measure of annual employment, used in the context of operations and maintenance jobs.
Maximum design scenario	The realistic worst case scenario, selected on a topic-specific and impact specific basis, from a range of potential parameters for the Proposed Development.
Onshore Infrastructure Area	The proposed area within the Proposed Development Order Limits landward of the Mean Low Water Springs, which contains the onshore High Voltage Direct Current cables, converter stations and onshore High Voltage Alternating Current cables.
Preliminary Environmental Information Report	A report that provides preliminary environmental information in accordance with the Infrastructure Planning (Environmental Impact Assessment) Regulations 2017. This is information that enables consultees to understand the likely significant environmental effects of a project and which helps to inform consultation responses.
Proposed Development	The UK element of the Xlinks Morocco-UK Power Project within the UK Exclusive Economic Zone, which includes the offshore cables, landfall site, onshore Direct Current and Alternating Current cables, converter stations, and road upgrade works.
Study area	This is an area which is defined for each Environmental Impact Assessment (EIA) topic which includes the site as well as potential spatial and temporal considerations of the impacts on relevant receptors. The study area for each EIA topic is intended to cover the area within which an effect can be reasonably expected. For this topic the study areas are based on pre-existing geographies that contain the epicentres of impact.

Term	Meaning
Years of Employment	A measure of temporary employment used in the context of development and construction jobs. For instance, a job lasting for a period of 18 months can be considered as accounting for 1.5 years of employment.

Acronyms

Acronym	Meaning
CEA	Cumulative Effects Assessment
DCO	Development Consent Order
DESNZ	Department for Energy Security and Net Zero
EEA	European Economic Area
EIA	Environmental Impact Assessment
GVA	Gross Value Added
HVAC	High Voltage Alternating Current
HVDC	High Voltage Direct Current
MHWS	Mean High Water Springs
MMO	Marine Management Organisation
NPS	National Policy Statement
ONS	Office for National Statistics
PDE	Project Design Envelope
PEIR	Preliminary Environmental Information Report
SLVIA	Seascape, Landscape and Visual Impact Assessment
SIC	Standard Industrial Classification
UK	United Kingdom

Units

Term	Meaning
GVA	Gross Value Added
km	kilometre
m	metre
MW	Megawatts

3 SOCIO-ECONOMICS AND TOURISM

3.1 Introduction

- 3.1.1 This chapter of the Preliminary Environmental Information Report (PEIR) presents the preliminary findings of the Environmental Impact Assessment (EIA) work undertaken to date for the United Kingdom (UK) elements of the Xlinks Morocco-UK Power Project. For ease of reference, the UK elements of the Xlinks Morocco-UK Power Project are referred to in this chapter as the 'Proposed Development'.
- 3.1.2 This chapter considers the potential impacts and effects of the Proposed Development on socio-economics and tourism during the construction, operation and maintenance and decommissioning phases. Specifically, it relates to the onshore and offshore elements of the Proposed Development.
- 3.1.3 In particular, this PEIR chapter:
- sets out the existing and future environmental baseline conditions, established from desk studies, surveys and consultation undertaken to date;
 - presents the potential environmental impacts and effects on all aspects of socio-economics and tourism arising from the Proposed Development, based on the information gathered and the analysis and assessments undertaken to date;
 - identifies any assumptions and limitations encountered in compiling the environmental information; and
 - highlights any necessary monitoring and/or mitigation measures that could prevent, minimise, reduce or offset the possible environmental effects identified in the EIA process.
- 3.1.4 The assessment presented is informed by the following technical chapters:
- Volume 3, Chapter 3: Commercial Fisheries (displacement effects inform this chapter);
 - Volume 4, Chapter 2: Landscape, Seascape and Visual Resources (visual impacts may cause effects on tourism);
 - Volume 3, Chapter 6: Shipping and Navigation (effects to operators and recreational users inform this chapter);
 - Volume 2, Chapter 6: Noise and Vibration (noise impacts may cause effects on tourism);
 - Volume 2, Chapter 8: Land Use and Recreation (recreational activities and users may be impacted);
 - Volume 2, Chapter 2: Historic Environment.
- 3.1.5 The PEIR will inform pre-application consultation. Following consultation, comments on the PEIR and any refinements in design will be reviewed and taken into account, where appropriate, in preparation of the Environmental Statement (ES) that will accompany the application to the Planning Inspectorate for development consent.

3.2 Legislative and Policy Context

Legislation

- 3.2.1 There is no specific legislation or guidance available on the methods that should be used to assess the socio-economic, tourism and recreation impacts of the Proposed Development.

Planning Policy Context

- 3.2.2 The Proposed Development will be located within the UK Exclusive Economic Zone (EEZ) offshore waters (beyond 12 nautical miles from the English coast) and inshore waters, with the onshore infrastructure located wholly within Devon, England. As set out in Volume 1, Chapter 1: Introduction, of the PEIR, the Secretary of State for the Department for Energy Security and Net Zero (DESNZ) has directed that elements of the Proposed Development are to be treated as development for which development consent is required under the Planning Act 2008, as amended.

National Policy Statements

- 3.2.3 There are currently six energy National Policy Statements (NPSs), three of which contain policy relevant to the Proposed Development, specifically:
- overarching NPS for Energy (NPS EN-1) which sets out the UK Government’s policy for the delivery of major energy infrastructure (Department for Energy Security & Net Zero 2023a);
 - NPS for Renewable Energy Infrastructure (NPS EN-3) (Department for Energy Security & Net Zero 2023b); and
 - NPS for Electricity Networks Infrastructure (NPS EN-5) (Department for Energy Security & Net Zero 2023c).
- 3.2.4 NPS EN-5 provides no guidance on socio-economics and tourism in addition to NPS EN-1. Therefore, it is not considered in the PEIR.
- 3.2.5 **Table 3.1** sets out key aspects from the NPSs relevant to the Proposed Development, with particular reference to the need for and approach to consenting such infrastructure.

Table 3.1: Summary of relevant NPS policy

Summary of NPS requirement	How and where considered in the PEIR
NPS EN-1	
Where the project is likely to have socio-economic impacts at local or regional levels, the applicant should undertake and include in their application an assessment of these impacts (paragraph 5.13.2).	This chapter considers the impacts on socio-economics and tourism from the construction, operation and maintenance and decommissioning of the Proposed Development.
The assessment should include the creation of jobs and training opportunities. Applicants may wish to provide information on the sustainability of the jobs created, including where they will help to develop the skills needed for the UK’s transition to Net Zero (paragraph 5.13.4).	Impacts on employment are considered in sections 0, 3.9 and 3.11 . Sustainability of jobs is considered alongside the impact on employment from the Proposed Development in sections 0, 3.9 and 3.11 .

Summary of NPS requirement	How and where considered in the PEIR
The assessment should consider the contribution to the development of low-carbon industries at the local and regional level as well as nationally (paragraph 5.13.4).	The contribution to the development of low-carbon industries is considered in Sections 0 and 3.9. The study areas considered include Devon and the UK. Tourism and recreation impacts are assessed at a more local level.
The assessment should consider any indirect beneficial impacts for the region hosting the infrastructure, in particular in relation to the use of local support services and supply chains (paragraph 5.13.4).	The impacts on Gross Value Added (GVA) and employment include indirect/supply chain impacts, as considered in sections 0 and 3.9 .
The assessment should include the impact of a changing influx of workers during the different construction, operation and decommissioning phases of the energy infrastructure (paragraph 5.13.4).	Assumptions around the workforce have been made and are assessed in sections 0 and 3.9 .
The assessment should include cumulative effects (paragraph 5.13.4).	Cumulative effects are considered in sections 3.10 and 3.11 .
Applicants should describe the existing socio-economic conditions in the areas surrounding the proposed development and should also refer to how the development's socio-economic impacts correlate with local planning policies (paragraph 5.13.5).	A baseline of existing socio-economic conditions and tourism activity is provided in section 3.5 .
Consideration of any impacts that are linked to socio-economic impacts (paragraph 5.13.6).	Links with other impacts are considered in section 3.13 .
NPS EN-3	
The Proposed Development will occupy an area of the sea and therefore it is inevitable that there will be an impact on navigation in and around the area of the site. This is relevant to both commercial and recreational users of the sea who may be affected by disruption or economic loss because of the proposed development (paragraph 2.8.178).	The economic impacts in relation to topics assessed in other chapters, such as commercial fisheries and shipping and navigation are considered in sections 0, 3.9, 3.11, 3.12 and 3.13 .
The Onshore Infrastructure Area of the Proposed Development has been made with a view to avoiding or minimising disruption or economic loss (paragraph 2.8.328).	Volume 1, Chapter 4: Need and Alternatives, of the PEIR, details the site selection process and how other users were considered in other chapters of the PEIR. Further mitigation and design refinement is considered in other chapters as these chapters inform the socio-economic assessment.

The National Planning Policy Framework

- 3.2.6 The National Planning Policy Framework (NPPF) was published in 2012 and updated in 2018, 2019, 2021 and 2023. (Department for Levelling Up, Housing and Communities, 2023). The NPPF sets out the Government's planning policies for England.
- 3.2.7 The UK Government has set out the principles that underpin planning policy in the National Planning Policy Framework (Ministry of Housing, Communities and Local Government, 2023). As part of this there are three key objectives that should be considered under sustainable development:
- an economic objective, with a focus on ensuring land is available in the right places and the right time to support growth, innovation and improved productivity;

- a social objective, with a focus on creating strong, vibrant and healthy communities; and
- an environmental objective, protecting and enhancing the environment, with support for the transition to a low carbon economy.

3.2.8 There is a presumption in favour of sustainable development, and significant weight should be placed on supporting economic growth and productivity.

3.2.9 The Proposed Development contributes to these objectives by reducing the need for fossil-fuel based generation as well as creating greater stability in the energy system, sending long-term price signals that give businesses the confidence to invest and boost the economy. It also directly contributes to the economy through its construction and operation.

3.2.10 **Table 3.2** sets out a summary of the NPPF policies relevant to this chapter.

Table 3.2: Summary of NPPF requirements relevant to this chapter

Policy	Key provisions	How and where considered in the PEIR
The planning system should support the transition to a low carbon future in a changing climate. – NPPF, Section 14, paragraph 157.	<p>New development should be planned for in ways that avoid increased vulnerability to the range of impacts arising from climate change.</p> <p>New development plans should consider identifying suitable areas for renewable and low carbon energy sources and supporting infrastructure. – NPPF, Section 14, paragraphs 159, 160.</p>	The contribution of the Proposed Development to decarbonisation is discussed throughout the Chapter. Reference to the decarbonisation of the UK economy is made within sections 0, 3.9 and 3.11.
Planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity. – NPPF, Section 6, paragraph 85.	<p>The Government’s commitment to creating jobs and prosperity through continued economic growth is defined within NPPF, which sets out the importance of:</p> <ul style="list-style-type: none"> • local and regional economic market business needs (paragraphs 81, 85); • setting out a clear economic vision and planning for economic development (paragraph 86) and; • provision and accessibility of new jobs. – NPPF, Section 6, paragraphs 85, 86. 	How the Proposed Development supports employment is discussed in sections 0, 3.9 and 3.11.

Local Planning Policy

3.2.11 The policy context for the Proposed Development is set out in Volume 1, Chapter 2: Policy and Legislation.

3.2.12 The onshore elements of the Proposed Development are located within the administrative areas of Torridge District Council and Devon County Council. The relevant local planning policies applicable to socio-economics and tourism based on the extent of the study areas for this assessment are summarised in **Table 3.3.**

Table 3.3: Summary of local planning policy relevant to this chapter

Policy	Key provisions	How and where considered in the PEIR
Devon County Council Strategic Plan 2021-2025	<p>The Devon County Council Strategic Plan is designed to set out a road map that will help Devon recover from the pandemic and work towards creating a prosperous and inclusive future for the area. The strategy identifies six main priorities:</p> <ul style="list-style-type: none"> • responding to the climate emergency; • creating an ambitious environment for children and young people; • supporting sustainable economic recovery; • tackling poverty and inequality; • improving health and wellbeing; and • helping communities be safe and connected. 	<p>The Devon County Council Strategic Plan is considered throughout the assessment of baseline environment in section 3.5.</p>
Heart of the South West LEP, The Local Industrial Strategy	<p>The Local Industrial Strategy sets out a comprehensive plan on how the South West Region, and its 16 local authorities, can deliver sustainable economic growth. The document has prioritised three areas of focus to grow the economy in a clean and sustainable way. These are energy, engineering and digital.</p>	<p>The Local Industrial Strategy is considered throughout the PIER, specifically in assessment of construction and operations effects (section 3.8 and section 3.9).</p>
North Devon and Torridge Local Plan 2011-2031	<p>The plan sets out the spatial planning policy for the area and how the area can deliver sustainable developments that meet economic, social and environmental objectives. The most relevant policy to the socio-economic impact of the Proposed Development is Policy ST11: Delivering Employment and Economic Development which states that the Councils will maintain and enhance a diverse local economy and encourage inward investment. In order to do this, the strategy outlines a number of policies, relevant ones include Policy ST16: Delivering Renewable Energy, Policy ST23: Infrastructure, Policy DM09: Safeguarding Green Infrastructure.</p>	<p>The North Devon and Torridge Local Plan is considered throughout the assessment of construction and operations effects (section 3.8 and section 3.9).</p>
The Great South West Tourism Partnership, Towards 2030	<p>This strategic plan highlights the current priorities and challenges to the South West’s tourism economy, as well as key objectives to make the region the most accessible and inclusive destination in the UK. The priorities of the strategy include:</p> <ul style="list-style-type: none"> • zero carbon: reducing carbon footprint of local businesses, and making it easier for visitors to make sustainable choices; • accessible and inclusive: meeting the accessibility needs of visitors to make the South West an inclusive destination; and • improving productivity: to address seasonality, value per visitor, research collaboration. 	<p>The Great South West Tourism Partnership is considered within the assessment of baseline environment relating to the tourism economy.</p>

3.3 Consultation and Engagement

- 3.3.1 In January 2024, the Applicant submitted a Scoping Report to the Planning Inspectorate, which described the scope and methodology for the technical studies being undertaken to provide an assessment of any likely significant effects for the construction and operational phases of the Proposed Development. It also described those topics or sub-topics which are proposed to be scoped out of the EIA process and provided justification as to why the Proposed Development would not have the potential to give rise to significant environmental effects in these areas.
- 3.3.2 Following consultation with the appropriate statutory bodies, the Planning Inspectorate (on behalf of the Secretary of State) provided a Scoping Opinion on 7 March 2024. Key issues raised during the scoping process specific to socio-economics, tourism and recreation are listed in **Table 3.4**, together with how these issues have been addressed within the PEIR.

Table 3.4: Summary of Scoping Responses

Comment	How and where considered in the PEIR
Planning Inspectorate	
<i>'The scope of the assessment should clarify how impacts within the North Devon District have been considered in the ES in relation to wider Devon and the UK, reflecting the wider socio-economic aspects of the Proposed Development on tourism, housing, and employment.'</i>	North Devon, alongside Devon County and the UK, have been considered throughout the PEIR, including in the assessment of construction effects (section 3.8) and assessment of operation and maintenance effects (section 3.9).
<i>'The impact on community services in addition to the availability of temporary accommodation based on the anticipated number of workers should form part of the assessment in the ES for both the construction and the decommissioning phases, where likely significant effects could occur.'</i>	The impact to community services and assets, as well as effects to the local housing market during the construction phase is considered in paragraph 3.8.71 . Impact during the decommissioning phase is considered alongside construction phase impacts.
<i>'The assessment should make clear how any likely significant effects have been determined for socio-economic aspects of the Proposed Development and clearly describe the methodology adopted for the assessment. Where professional judgement has been used this should be supported with robust evidence.'</i>	The methodology for determining significant effects is set out in section 3.4 , alongside the definition of sensitivity and magnitude criteria for each impact scoped into the socio-economic assessment.
<i>'The ES must clearly explain which matters are included in the socio-economic assessment and any inter-relationships between chapters, to avoid duplication or omission.'</i>	Matters scoped into the socio-economic assessment are set out in Table 3.5 . The inter-relationships between the assessment and other chapters are set out in relevant sections including those impacts that relate to tourism sectors and tourism and recreation assets (paragraph 3.8.33 and paragraph 3.8.36)
<i>'Consideration should be given to the availability and origin of the workforce in the context of other projects proposed in the region. Any assumptions around workforce origins within the socio-economic assessment used to inform the study area should be made clear in the ES.'</i>	The assessment of impacts relating to economic activity during the construction phase has accounted for workforce origin by considering the ability of each study area to carry out the given contract value. This is embedded in the assessment.
<i>'The ES should detail the criteria used to identify businesses, likely to be affected during construction and decommissioning phases. The Applicant should</i>	A list of businesses with anticipated involvement in the construction phase of the Proposed Development has been provided by the Applicant. This has been embedded in the assessment of

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Comment	How and where considered in the PEIR
<i>seek to agree these with relevant consultation bodies, such as the local authorities.'</i>	effects and will be agreed with the relevant local authorities.
<i>'The Inspectorate considers that significant effects on tourism accommodation should be considered in the assessment, and this should be cross referenced to the land use and recreation assessment of the impact of disruption and reduced access to recreational resources in the ES.'</i>	Impacts to tourism accommodation are considered as part of the assessment of tourism and recreational assets.
Alverdiscott and Huntshaw Parish Council	
Consideration should be given to properties within the vicinity of the Proposed Development in the context of compensation or grants to cover any reduction in property values.	Mitigation measures are set out in section 3.7 .
The residents most affected by the construction and operation of the converter stations are largely retired, reside in old houses and all live off grid, so will be unlikely to benefit in any way from the output of the project except for a warm feeling from supporting the move towards a greener future. Any compensation for residents of Huntshaw and Alverdiscott parishes therefore needs to be considered separately from anything aimed at compensating residents along the cable route.	Mitigation measures are set out in section 3.7 .
Devon County Council	
<i>'The ES should assess whether this project would result in any impact on the development of future planned offshore renewables, or marine sector as part of the UK and Devon domestic economy and any future projects' potential contribution towards a highly skilled, high productivity, high value offer nationally and locally.'</i>	Cumulative impacts are considered in section 3.11 .
<i>'Consideration should be given to the importance of tourism in the area in the context of any job creation, skills and community benefit identified in the socio-economic assessment.'</i>	Consideration to both the tourism sector and tourism and recreational assets has been considered. Context relating to the drivers of tourism activity in the local area has been embedded within the sensitivity and magnitude criteria.
Littleham and Landcross Parish Council	
<i>'The cable route also provides an opportunity to create a footpath/cycle path/bridleway from the SW Coast Path to the Tarka Trail - this would be a major community benefit contributing to social and economic well-being and active travel in the area. This would be a major positive impact and should be considered.'</i>	Specific mitigation measures relating to recreational routes will be set out in Volume 2, Chapter 8: Land Use and Recreation. The socio-economics and tourism chapter will take account of any mitigation measures outlined.
Torrige District Council	
<i>'Impacts on a wider Northern Devon tourism economy should also be considered through the Environmental Statement.'</i>	Impacts to the tourism sector considers both North Devon and Torrige District alongside Devon County Council and the UK.
<i>'Consideration should be given to areas beyond Torrige District, for example North Devon District, within the socio-economic assessment.'</i>	This assessment considers both North Devon and Torrige District alongside Devon County Council and the UK.

3.4 Methodology

Relevant Guidance

- 3.4.1 There is no statutory guidance on the methodology for undertaking assessments for socio-economics, tourism and recreation. The assessment follows guidance from the NPS and a best practice methodology, formed from other assessments undertaken on other similar schemes.
- 3.4.2 **Table 3.1** outlines the sets out key aspects from the NPSs which need to be considered as part of any socio-economic and tourism impact assessment of an energy project in England. The assessment for each activity will comply with the EN-1 Overarching National Policy Statement for Energy and EN-3 National Policy Statement for Renewable Energy Infrastructure (Department for Energy Security and Net Zero, 2023).
- 3.4.3 The assessment of recreation assets will also comply with guidance in the Design Manual for Roads and Bridges (DMRB).

Scope of the Assessment

- 3.4.4 The issues considered within this assessment are outlined in **Table 3.5**.

Table 3.5: Issues considered within this assessment

Activity	Potential effects scoped into the assessment
Construction Phase	
Economic Expenditure	The impact from spending on the construction of the Proposed Development is included in the assessment as it is likely to benefit businesses in the Local Area.
Employment	The impact from spending on the construction of the Proposed Development is included in the assessment as it is likely to support temporary employment in the Local Area.
Tourism economy	The impact on the tourism economy of the Local Area is considered.
Tourism and recreation assets	The assessment considers the impact of any disturbance from noise, visual and traffic impacts on tourism and recreation receptors.
Operation and Maintenance	
Economic Expenditure	The impact from spending on the construction of the Proposed Development is included in the assessment as it is likely to benefit businesses in the Local Area.
Employment	The impact from spending on the construction of the Proposed Development is included in the assessment as it is likely to support temporary employment in the Local Area.
Tourism economy	The impact on the tourism economy of the Local Area is considered.
Tourism and recreation	The assessment considers the impact of any disturbance from noise, visual and traffic impacts on tourism and recreation receptors.

Activity	Potential effects scoped into the assessment
Impact to British energy consumers	The assessment considers the impact to British energy consumers.
Cumulative Impacts	
Employment	The cumulative impact to employment and competition for labour.
Community and Social Assets	The cumulative impact to community and social assets, including housing, and healthcare and education provision.
Tourism Economy	The cumulative impacts to the tourism economy.

3.4.5 Decommissioning impacts relevant to socio-economics and tourism impacts will be considered within the ES when more information is available relating to cost and supply chain structures.

Study Area

3.4.6 The Proposed Development would be located within the Draft Order Limits, with the onshore elements proposed to be located within the Onshore Infrastructure Area, which lies within the local authority area of Torridge District Council and Devon County Council, in North Devon.

3.4.7 The choice of the study areas considered in the assessment was based on BiGGAR Economics’ guidance on the definition of Local Economic Areas in the context of offshore projects, as drafted on behalf of Marine Scotland. The process provides a set of principles that can be applied to projects across the UK.

3.4.8 The guidance identified six principles for the identification of Local Economic Areas through a consultation programme and case study analysis. These can be used to define Local Economic Areas based on pre-existing geographies that contain the epicentres of impact. The principles are:

- Principle 1 (Dual Geographies) – The Local Economic Area for the supply chain and investment impacts should be separate from the Local Economic Area(s) for wider socio-economic impacts, including tourism and recreation.
- Principle 2 (Appropriate Impacts) – The appropriate impacts to be considered for assessments should be identified before defining the Local Economic Areas.
- Principle 3 (Epicentres) – The Local Economic Areas should include all the epicentres of the appropriate impacts.
- Principle 4 (Accountability) – The Local Economic Areas used in the assessment should comprise of pre-existing economic or political geographies (community councils, local authorities, development agencies) to enhance accountability.
- Principle 5 (Understandable) – The Local Economic Areas should be defined in such a way that they are understandable to the communities they describe.
- Principle 6 (Connected Geography) – The Local Economic Area for the supply chain and investment impacts should consist of connected (including coastal) pre-existing economic or political geographies.

3.4.9 Based on these principles, the following study areas have been defined for socio-economic and tourism sector impacts, and are shown on Volume 4, Figure 3.1:

- Local Area, defined as the local authorities of North Devon and Torridge;

- Devon, as represented by the county council area; and
 - the UK.
- 3.4.10 The above study areas will be considered in the assessment economic activity impacts, in the construction and operational phases, as well as impacts to community and social assets.
- 3.4.11 Given the scale of the Proposed Development and the economic opportunity it underpins, impacts are also considered with reference to the UK economy as a whole.
- 3.4.12 Impacts on tourism economy have been considered only with reference to the Local Area because all the receptors that could be impacted are within this area.
- 3.4.13 Impacts to tourism and recreation receptors have been identified based on those likely to experience significant environmental effects, as identified in other chapters. The largest area considered in other chapters of the assessment is Landscape and Visual Impact, which considers a 10 km zone around the Converter Site. All onshore tourism and recreation receptors considered in the assessment will be located in a study area of within 10 km of the Converter Site. The impact on recreation assets for offshore receptors, such as yachting, are considered in Volume 3, Chapter 5 Shipping and Navigation.

Methodology for Baseline Studies

Desk Studies

- 3.4.14 A socio-economic and tourism baseline assessment was undertaken in January 2024 to assess the existing and future socio-economic conditions. This was a desktop review using the most up-to-date available data. A summary of desk study sources used are considered in **Table 3.18**.

Site-Specific Surveys

- 3.4.15 To carry out the socio-economic and tourism assessment, it was not necessary to undertake any site-specific surveys. For the assessment of socio-economic effects, the most accurate and update to date information is obtained through secondary sources, such as from the Office for National Statistics. Similarly, the assessment of tourism and recreation impacts involves considering secondary impacts identified in other chapters. As such, primary research is not needed.

Impact Assessment Methodology

Overview

- 3.4.16 Volume 1, Chapter 5: EIA Methodology provides a summary of the general impact assessment methodology applied to the Proposed Development. The following sections outline the methodology used to assess the potential impacts on socio-economics and tourism.
- 3.4.17 The following sections set out the approach that has been followed in defining the magnitude of impact and the relative sensitivity of the receptors considered as part of the assessment.

Definitions of Magnitude

- 3.4.18 A series of dimensions need to be considered to establish the magnitude and probability of impact. These include:
- Spatial extent: The geographical area over which an impact may occur.
 - Duration: The duration over which an impact may occur (short term to long term).
 - Frequency and or likelihood of occurrence: How often the impact may occur and/or how likely occurrence is.
 - Severity: The degree of change relative to the baseline level.
- 3.4.19 The socio-economic, tourism and recreation impacts are considered over distinct study areas to capture the spatial extent of any impact. The magnitude of any impact is then considered in relation to the baseline conditions within those study areas. Impacts may be positive or negative.
- 3.4.20 The frequency and temporal extent of any impact will be considered and those which occur over a short period of time will be described as temporary and those which occur over a longer period will be described as permanent. For example, those impacts that occur during the development and construction period are temporary and those that occur throughout the operations and maintenance period are permanent.
- 3.4.21 The approach to determining the severity, and therefore magnitude, of any socio-economic, tourism and recreation impacts is outlined in this section, including:
- changes to economic activity;
 - impacts to tourism and recreation assets;
 - impacts to community and social assets; and
 - impacts to British electricity consumers.
- 3.4.22 Between 2000 and 2019, the average level of GDP per capita growth in the UK was 1% per annum (IMF, 2022). Similarly, between 2000 and 2019 the number of jobs has grown by 1% per annum (ONS, 2022). The magnitude of any change in an economy should be considered within this context.

Magnitude of Economic impact

- 3.4.23 The magnitude of employment impacts has been considered in relation to the levels of economic activity within a study area. The magnitude is considered to be relative to the number of people in employment, rather than the unemployed. The geographic split of impact analysis is based on where people work, rather than where they live. The economic impacts will derive from the distribution of contracts linked with the Proposed Development. Therefore, the approach that has been followed in distributing contracts between study areas is based on the potential locations of the companies.
- 3.4.24 In line with industry best practice, for the purposes of the assessment of GVA and employment impacts, the analysis focuses on:
- direct economic impacts: economic impact associated with the activity of primary contractors involved in the development, construction and operations and maintenance of the Proposed Development.

- indirect economic impacts: economic impact associated with the spending taking place across the supply chain of those businesses involved in the development, construction and operations and maintenance of Proposed Development.

3.4.25 The assessment also refers to the additional benefits associated with the spending in the economy by those employed to carry out works associated with the Proposed Development (induced economic impacts).

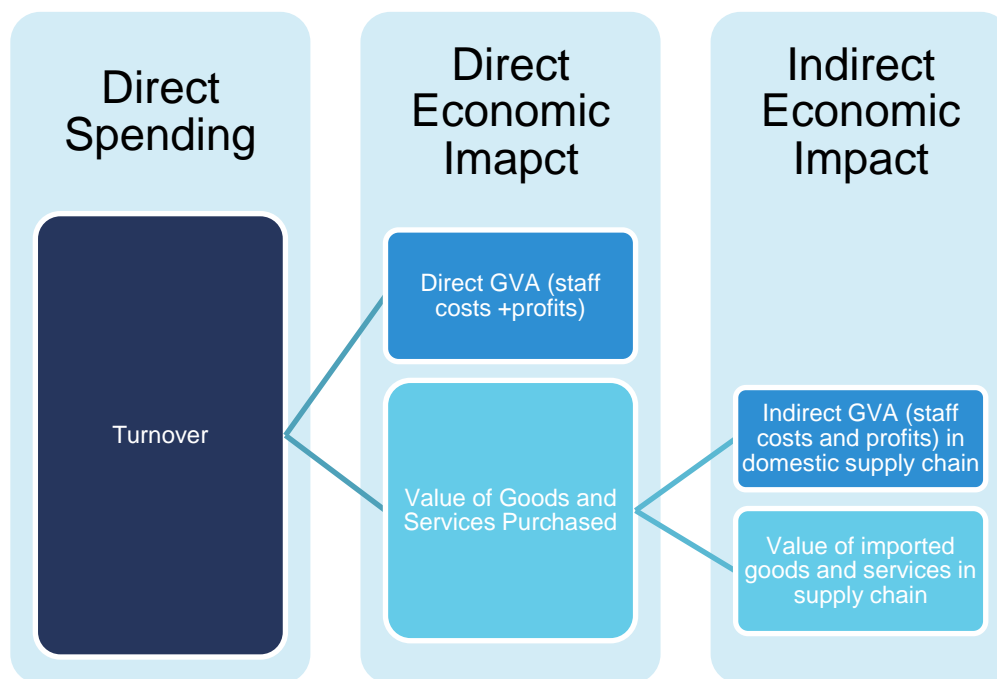
3.4.26 Economic impacts are expressed in terms of:

- GVA: a measure of economic activity expressed as the difference between an organisation's turnover and its non-staff operational expenditure.
- years of employment: a measure of short-term employment used in the context of jobs associated with construction and development activity. As an example, a job lasting for 18 months is equivalent to 1.5 years of employment.
- jobs: a measure of employment used to reflect long-term employment as that characterising the operations and maintenance phase.

Relationship Between GVA and Turnover

3.4.27 The GVA of any contract or area of spending that is captured within a study area is always less than the total turnover of this contract or area of spending. The GVA of an organisation is equivalent to the value that the organisation has added to its inputs. This value is typically considered to be the staff costs (the value added by the employees of an organisation) plus the profits (the value added by the physical and financial capital of the organisation). The value of the inputs is typically considered to be the spending of the organisation in the supply chain. This assessment also considers the GVA further down the supply chain, the indirect economic impact. This captures a greater proportion of the turnover as GVA. However, as organisations will import goods and services from outside a study area, the sum of direct and indirect GVA will always be less than the turnover. This is outlined in **Plate 3.1**.

Plate 3.1: Relationship between turnover and GVA



3.4.28 The definitions of the magnitude of impacts for economic impacts are provided in **Table 3.6**.

Table 3.6: Definition of magnitude for economic impacts

Magnitude	General economies
High	An impact would be considered to have a high magnitude if it was equivalent to all of the typical economic growth per capita. Specifically, for each study area: <ul style="list-style-type: none"> • peak annual GVA impact is greater than, or equal to, 1% of the economy; or • peak employment supported is greater than, or equal to, 1% of the total number of jobs.
Medium	An impact would be considered to have a medium magnitude if it was equivalent to half of the typical economic growth per capita. Specifically, for each study area: <ul style="list-style-type: none"> • peak annual GVA impact is greater than, or equal to, 0.5% of the economy; or • peak employment supported is greater than, or equal to, 0.5% of the total number of jobs.
Low	An impact would be considered to have a low magnitude if it was equivalent to a quarter of the typical economic growth per capita. Specifically, for each study area: <ul style="list-style-type: none"> • peak annual GVA impact is greater than, or equal to, 0.25% of the economy; or • peak employment supported is greater than, or equal to, 0.25% of the total number of jobs.
Negligible	An impact would be considered to have a negligible magnitude if it was equivalent to less than a quarter of the typical economic growth per capita. Therefore, for each study area: <ul style="list-style-type: none"> • peak annual GVA impact is less than 0.25% of the economy; or • peak employment supported is less than 0.25% of the total number of jobs.

Magnitude of Sector Specific Economic Impacts

- 3.4.29 In addition to the change in the overall impact in the GVA or employment of an area, consideration should be made of the sectors of the economy which are considered to contribute to the economic sensitivity of the area. For example, if there is a comparatively high level of employment in the tourism trade, particular attention should be given to the magnitude of change within these sectors. Similarly, some sectors may contribute to the economic sensitivity of an area because of their relationship to the Proposed Development that is being developed. For example, as the Proposed Development is associated with offshore development, then the construction, manufacturing and professional services sectors present in an area are likely to contribute towards its sensitivity.
- 3.4.30 The definitions of the magnitude of impacts within sectors are provided in **Table 3.7**.

Table 3.7: Definition of magnitude for sector specific economic impacts

Magnitude	Sector specific (including tourism)
High	An impact would be considered to have a high magnitude on a sector if the change within that sector was equivalent to all of the sector's share of typical economic growth per capita. Specifically, for each sector in a study area: <ul style="list-style-type: none"> • peak annual GVA impact within that sector is greater than, or equal to, 1% of the sector; or • peak employment supported by the sector is greater than, or equal to, 1% of the total number of jobs in that sector.
Medium	An impact would be considered to have a medium magnitude on a sector if the change within that sector was equivalent to half of the sector's share of typical economic growth per capita. Specifically, for each sector in a study area: <ul style="list-style-type: none"> • peak annual GVA impact within that sector is greater than, or equal to, 0.5% of the sector; or • peak employment supported by the sector is greater than, or equal to, 0.5% of the total number of jobs in that sector.
Low	An impact would be considered to have a low magnitude on a sector if the change within that sector was equivalent to a quarter of the sector's share of typical economic growth per capita. Specifically, for each sector in a study area: <ul style="list-style-type: none"> • peak annual GVA impact within that sector is greater than, or equal to, 0.25% of the sector; or • peak employment supported by the sector is greater than, or equal to, 0.25% of the total number of jobs in that sector.
Negligible	An impact would be considered to have a negligible magnitude on a sector if the change within that sector was equivalent to less than a quarter of the sector's share of typical economic growth per capita. Specifically, for each sector in a study area: <ul style="list-style-type: none"> • peak annual GVA impact within that sector is less than 0.25% of the sector; or • peak employment supported by the sector is less than 0.25% of the total number of jobs in that sector.

Magnitude of Impacts to Tourism and Recreation Assets

- 3.4.31 Impacts, both positive or negative, will occur on tourism receptors if they are sensitive to changes that will occur because of the Proposed Development.

- 3.4.32 The impacts considered on tourism assets are changes to visitor or user behaviour and outcomes, and how it will change behaviour compared to the current baseline of visitor or user behaviour of the receptor.
- 3.4.33 The definitions of the magnitude of impacts on tourism and recreation assets are provided in **Table 3.8**.

Table 3.8: Definitions of magnitude of tourism and recreation impacts

Magnitude	Tourism and recreation impacts
High	The impact on a tourism and recreation asset would be considered to have a high magnitude if is predicted to experience a major change of behaviour of visitors or users.
Medium	The impact on a tourism and recreation asset would be considered to have a medium magnitude if is predicted to experience a moderate change of behaviour of visitors or users.
Low	The impact on a tourism and recreation asset would be considered to have a low magnitude if is predicted to experience a minor change of behaviour of visitors or users.
Negligible	The impact on a tourism and recreation asset would be considered to have a negligible magnitude if is predicted to experience an undetectable change of behaviour of visitors or users.

Magnitude of Social and Community Assets

- 3.4.34 The magnitude of impacts on the social or community assets (housing, education and health facilities) is dependent on the demographic changes that will occur in each of the study areas because of the Proposed Development.
- 3.4.35 The severity of any change in demographics is measured against the level of annual change that is typical in the study area that it serves. This will be in line with the change a community or social asset will accommodate in a year. The definitions of the magnitude of impacts on the local housing market are provided in **Table 3.9**.

Table 3.9: Definitions of magnitude of impacts to social and community assets

Magnitude	Social and Community Assets
High	The impact on a social or community asset would be considered to have a high magnitude if the change in residual population was equivalent to 100% or more of the average annual growth rate for the study area.
Medium	The impact on a social or community asset would be considered to have a medium magnitude if the change in residual population was equivalent to between 50% and 100% of the average annual growth rate for the study area.
Low	The impact on a social or community asset would be considered to have a low magnitude if the change in residual population was equivalent to between 25% and 50% of the average annual growth rate for the study area.
Negligible	The impact on a social or community asset would be considered to have a negligible magnitude if the change in residual population was equivalent to less than 25% of the average annual growth rate for the study area.

Magnitude of Impacts to British Electricity Consumers

- 3.4.36 The magnitude of impacts to British electricity consumers has been considered in relation to the price British consumers pay for electricity. This has been considered due to a series of evidence highlighting the impact of market flexibility on electricity prices. Recognising that the MUPP is a unique project because it will supply the UK exclusively with renewably generated power from Morocco, the available evidence used at the assessment stage is presented in **paragraph 3.9.39**.
- 3.4.37 A summary of the definitions and contributing factors for the magnitude of impacts to British energy consumers is given in **Table 3.10**.

Table 3.10: Definition of magnitude for impacts to British electricity consumers

Magnitude	Definition
High	An impact would be considered to have a high magnitude if the cumulative cost savings to British electricity consumers were substantial.
Medium	An impact would be considered to have a medium magnitude if the cumulative cost savings to British electricity consumers were moderate.
Low	An impact would be considered to have a low magnitude if the cumulative cost savings to British electricity consumers were marginal.
Negligible	An impact would be considered to have a negligible magnitude if the cumulative cost savings to British electricity consumers were little to none.

Sensitivity of Receptors

- 3.4.38 For the purposes of this assessment, the sensitivity of a receptor is defined with respect to the following characteristics:
- Adaptability - The degree to which a receptor can avoid or adapt to an impact.
 - Tolerance - The ability of a receptor to accommodate temporary or permanent change without a significant adverse impact.
 - Reversibility and recoverability - the temporal scale over and extent to which a receptor will recover following an impact.
 - Value and importance - a measure of the receptor's importance in terms of its relative ecological, social, or economic value or status.
- 3.4.39 These dimensions of sensitivity have been applied to socio-economic and tourism receptors by considering:
- changes to economic activity;
 - impacts to specific economic sectors;
 - impacts to tourism and recreation assets;
 - impacts to local housing market; and
 - impacts to British electricity consumers.

Sensitivity of Economies

- 3.4.40 The sensitivity of an economy is linked to how well it is able to absorb change. To consider the sensitivity of an economy, or a sector within that economy, it is necessary to consider both the resilience and agility of the economy. There are a

number of factors that contribute to an assessment of resilience and agility, these include the:

- scale of the economy;
- diversity of sectors in the economy;
- level of economic activity; and
- level of skills and education; and level of economic potential from utilising capital (natural, human, social, economic)

- 3.4.41 The scale of an economy is particularly important in rural areas. An economy that is small in absolute terms may have less agility, particularly if the structure is well established. Demographic trends are also likely to be relevant.
- 3.4.42 The diversity of the economy, as defined by the spread of sectors, is a good indicator of resilience. If an economy is over reliant on one sector, then a shock that impacts on this sector could have a disproportionate impact on the economy as a whole.
- 3.4.43 The economic activity rate in an economy, particularly how this compares to the wider national economy and trends in this rate are an indicator of economic resilience. A declining, either in absolute or relative terms, economically active population could indicate that the economy has been less able to accommodate changes. Conversely, an economically active population that is growing at a faster rate than the national average could indicate a greater level of agility.
- 3.4.44 The level of skill in an economy, as described by the level of qualifications and occupation level, indicate the ability of the workforce to react to new employment opportunities or find new work if there is a loss of employment.
- 3.4.45 The economic potential of an economy is linked to the natural, human, social and economic capital that is available.
- 3.4.46 The definitions of sensitivity are provided in **Table 3.11** for socio-economic receptors.

Table 3.11: Definitions of sensitivity for a socio-economic receptor

Sensitivity	Definition
High	<p>A highly sensitive economy will not be able to absorb changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of high sensitivity include:</p> <ul style="list-style-type: none"> • The economy is particularly reliant on a single sector; • The number of jobs in the economy has been declining over multiple years; and • The share of people with no qualifications is significantly above the average for the wider economy.
Medium	<p>A medium sensitive economy has a moderate capacity to absorb changes without fundamentally altering its present character or value, however it would be less resilient than the wider economy. Factors that would contribute to an economy being considered of medium sensitivity include:</p> <ul style="list-style-type: none"> • The economy is particularly reliant on a small number of sectors; • The number of jobs in the economy has grown less than the wider economy; and • The share of people with no qualifications is above the average for the wider economy.
Low	<p>A low sensitive economy is tolerant to changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of low sensitivity include:</p> <ul style="list-style-type: none"> • Most sectors of the economy are well represented; • The number of jobs in the economy has grown in line with the wider economy; and • The level of educational attainment is in line with the wider economy.
Negligible	<p>An economy with negligible sensitivity is very agile and will be able to accommodate changes without affecting its character or overall value. Factors that would contribute to an economy having negligible sensitivity include:</p> <ul style="list-style-type: none"> • The economy is well balanced between sectors; • The number of jobs in the economy has grown at a quicker rate than the wider UK economy; and • The share of people with no qualifications is below average for the wider economy.

Sensitivity of Tourism Economy

3.4.47 The assessment will consider the effect of the Proposed Development on the tourism economy. This will require an assessment of the sensitivity of the tourism sector in the study area. A tourism sector will be sensitive if there are only a few drivers of tourism or if there is a particular reliance on a particular type of visitor.

3.4.48 The assessment of sensitivity will also consider the nature of the effect and the key drivers of the tourism economy in each study area. As discussed in **Table 3.13**, different tourism and recreation assets will be sensitive to different environmental effects. Therefore, if key assets within the tourism sector are not sensitive to an environmental effect, this will reduce the sensitivity of the tourism economy to that effect. Similarly, if the key markets of the tourism sector in an area are sensitive to a particular environmental effect this will also contribute to the overall sensitivity of the tourism sector. Therefore, the overall sensitivity of the tourism sector is dependent on the sensitivity of the drivers of tourism in the area.

3.4.49 To assess the sensitivity of the tourism economy in each of the study areas it is necessary to consider:

- Type and number of drivers of tourism to the area;

- Sensitivity of key drivers of the tourism economy to the nature of the effect; and
- Types of visitors that are attracted to the area.

3.4.50 The definitions of sensitivity are provided below in **Table 3.12** for the tourism sector.

Table 3.12: Definition of sensitivity for tourism sector

Sensitivity	Definition
High	A highly sensitive tourism sector will not be able to absorb changes without fundamentally altering its present character or value. Factors that would contribute to a tourism sector being considered of high sensitivity include: <ul style="list-style-type: none"> • The tourism sector is particularly reliant on a single attraction or market that is sensitive to the environmental effect; and • The number of jobs in the tourism sector economy has been declining over multiple years.
Medium	A medium sensitive tourism sector has a moderate capacity to absorb changes without fundamentally altering its present character or value. Factors that would contribute to a tourism sector being considered of medium sensitivity include: <ul style="list-style-type: none"> • The tourism sector is particularly reliant on a small number of attractions or markets that are sensitive to the environmental effect; and • The number of jobs in the tourism sector economy has grown at a slower rate than the wider tourism sector.
Low	A low sensitive tourism sector will be able to absorb changes without fundamentally altering its present character or value. Factors that would contribute to a tourism sector being considered of low sensitivity include: <ul style="list-style-type: none"> • The assets and markets that drive the tourism economy are not sensitive to the environmental effect; and • The number of jobs in the tourism sector economy has grown at a similar rate to wider tourism sector.
Negligible	A tourism sector with negligible sensitivity is very agile and will be able to accommodate changes without affecting its character or overall value. Factors that would contribute to a tourism sector being considered of negligible sensitivity include: <ul style="list-style-type: none"> • There are a wide range of assets and markets that drive the tourism economy in the area; and • The number of jobs in the tourism sector economy has grown at a faster rate than the wider tourism sector.

3.4.51 This assessment will consider how the tourism sector contributes to the wider economy of each study area and if it is a contributing factor to the sensitivity of the economy. It will first consider the contribution of the tourism sector to the local economy, including:

- tourism employment as a proportion of total employment; and
- contribution of the tourism sector to the productivity of the local economy.

3.4.52 It will also consider the contribution of the area to the tourism sector in the wider economy of the United Kingdom. This includes:

- number of visitors to the area relative to the number of visitors to the wider area of the United Kingdom; and
- presence of tourism attractions/receptors that are considered to be of national or regional importance.

3.4.53 The effect of the tourism sector on the economy of the study area will be considered as part of the economic impact analysis, if it is determined that the wider economy is sensitive to changes in the tourism sector.

Sensitivity of Tourism and Recreation Assets

3.4.54 The effect on the tourism and recreation assets is scoped into this assessment and covered alongside impacts on public rights of way.

3.4.55 The sensitivity of a tourism and recreation asset is determined by how reactive visitors, or users, of this asset are to a change in the environment. The sensitivity may change depending on which environmental factor is being considered. For example, an asset may be highly sensitive to changes in traffic and transport activity but have negligible sensitivity to landscape and visual impacts.

3.4.56 The sensitivity of these assets will also depend on the ability of the asset to react to any change. Assets that provide a fixed offering, such as monuments or nature-based attractions will be, other things equal, more sensitive to change.

3.4.57 The definitions of sensitivity are provided in **Table 3.13** for tourism and recreation assets.

Table 3.13: Definition of sensitivity for tourism and recreation assets

Sensitivity	Definition
High	A tourism or recreation asset with a high sensitivity will not be able to tolerate or adapt to effects as these will result in a fundamental change in visitor behaviour. Factors that will contribute to a tourism or recreational asset being considered of high sensitivity include: <ul style="list-style-type: none"> • Being dependent on a single environmental condition to attract or accommodate visitors and users; and • Being unable to adapt or adjust in response to changes in visitor or user behaviour.
Medium	A tourism or recreational asset with a medium sensitivity will have limited capacity to tolerate or adapt to effects as these will result in a moderate change in visitor behaviour. Factors that will contribute to a tourism or recreational asset being considered of medium sensitivity include: <ul style="list-style-type: none"> • Being influenced by a single environmental condition to attract or accommodate visitors and users; and • Having a limited ability to adapt or adjust in response to changes in visitor or user behaviour.
Low	A tourism or recreational asset with a low sensitivity will have the ability to tolerate or adapt to effects as these will result in an incidental change in visitor behaviour. Factors that will contribute to a tourism or recreational asset being considered of low sensitivity include: <ul style="list-style-type: none"> • Environmental conditions have a minor influence on the ability of the asset to attract or accommodate visitors and users; and • Being able to adapt or adjust the assets in response to changes in visitor or user behaviour.
Negligible	A tourism or recreational asset with a negligible sensitivity will be resistant to changes in environmental factors. Factors that will contribute to a tourism or recreational asset being considered of negligible sensitivity include: <ul style="list-style-type: none"> • Environmental conditions have a negligible influence on the ability of the asset to attract or accommodate visitors and users; and • Having substantial ability to adapt or adjust the assets in response to changes in visitor or user behaviour.

Sensitivity of Community and Social Assets

- 3.4.58 The effect on community and social assets is scoped into this assessment. This includes the demand for housing, health services and education services.
- 3.4.59 The adaptability and tolerance of the housing market to accommodate change in Devon is implied by the relative change in the price of housing stock compared to the economy of the UK. If prices have increased significantly more within a study area, this would suggest that the housing market has not been able to adapt to a change in demand.
- 3.4.60 In the long term, community and social assets will adapt to serve the communities they are in. Hospitals and education facilities are planned based on the demographic demands in a particular area. Therefore, these sensitivities are considered for short term impacts only and the long-term sensitivities of these receptors will be negligible. As a result, the impacts on community and social assets are only considered during the development and construction phase.
- 3.4.61 The sensitivity of the public assets such as health services or schools will be dependent on the concentration of resources that are allocated to these assets. It is assumed that the ability of these assets to adapt to change will not vary geographically because they form part of a nationally planned system. Therefore, the key factor of sensitivity is tolerance to change. It is assumed that this is linked to the relative size of the community that is served by these assets. If a teacher or doctor has less students or patients than the national average, they are more likely to be able to tolerate changes, specifically increases, in these numbers. As a result, these assets will be less sensitive to change.
- 3.4.62 A summary of the definitions and contributing factors for the sensitivity of community and social assets are given in **Table 3.14**.

Table 3.14: Definition of sensitivity for the community and social assets

Sensitivity	Definition
High	<p>A community or social asset with a high sensitivity will not be able to tolerate or adapt to impacts as these will result in a fundamental change in the ability of these assets to meet the needs of the community. Factors that will contribute to a community or social asset being considered of high sensitivity include:</p> <ul style="list-style-type: none"> • House prices have increased at a notably faster rate than the national average • The number of GPs per capita is much lower than the national average • The number of pupils per teacher is much higher than the national average
Medium	<p>A community or social asset with a medium sensitivity will have a limited capacity to tolerate or adapt to impacts as these will result in a moderate change in the ability of these assets to meet the needs of the community. Factors that will contribute to a community or social asset being considered of medium sensitivity include:</p> <ul style="list-style-type: none"> • House prices have increased at a faster rate than the national average • The number of GPs per capita is lower than the national average • The number of pupils per teacher is higher than the national average
Low	<p>A community or social asset with a high sensitivity will be able to tolerate or adapt to impacts without a change in the ability of these assets to meet the needs of the community. Factors that will contribute to a community or social asset being considered of low sensitivity include:</p> <ul style="list-style-type: none"> • House prices have increased at a similar rate than the national average • The number of GPs per capita is similar to the national average • The number of pupils per teacher is similar to the national average

Sensitivity	Definition
Negligible	<p>A community or social asset with a negligible sensitivity will be resistant to change as they will have a greater capacity to tolerate changes than the wider country. Factors that will contribute to a community or social asset being considered of negligible sensitivity include:</p> <ul style="list-style-type: none"> • House prices have increased at a slower rate than the national average • The number of GPs per capita is higher to the national average • The number of pupils per teacher is lower than the national average

Sensitivity of Impacts to British Electricity Consumers

- 3.4.63 The effect on the British electricity consumers during the operation and maintenance phase is scoped into this assessment.
- 3.4.64 The sensitivity of British electricity consumers is linked to how well it is able to absorb change. To consider the sensitivity of British electricity consumers, it is necessary to assess both their susceptibility to price fluctuations and their resilience in coping with them. In this context, the main factor contributing to this assessment is the Britain’s electricity mix.
- 3.4.65 A summary of the definitions and contributing factors for the sensitivity of British energy consumers is given in **Table 3.15**.

Table 3.15: Definition of sensitivity for British electricity consumers

Sensitivity	Definition
High	British electricity consumers will be highly sensitivity when they are not be able to absorb changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of high sensitivity include the electricity mix being particularly reliant on a single source.
Medium	British electricity consumers will be of a medium sensitivity when they have a moderate capacity to absorb changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of medium sensitivity include being particularly reliant on a small number of sources.
Low	British electricity consumers will be of a low sensitivity when they are tolerant to changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of low sensitivity include a well-represented electricity mix, comprising of various sources.
Negligible	British electricity consumer will be of a negligible sensitivity when they are very agile and will be able to accommodate changes without affecting its character or overall value. Factors that would contribute to an economy having negligible sensitivity include a well-balanced represented electricity mix, comprising of several sources.

Impact Significance

- 3.4.66 The potential significance of effect for a given impact, is a function of the sensitivity of the receptor and the magnitude of the impact (see Volume 1, Chapter 5: EIA Methodology for further details). A matrix is used (**Table 3.16**) as a framework to determine the significance of an effect. Definitions of each level of significance are provided in **Table 3.17**. Impacts and effects may be deemed as being either positive (beneficial) or negative (adverse).
- 3.4.67 It is important that the matrix (and indeed the definitions of sensitivity and magnitude) is seen as a framework to aid understanding of how a judgement has

been reached from the narrative of each effect assessment and it is not a prescriptive formulaic method.

- 3.4.68 Potential effects are described followed by a statement of whether the effect is significant in terms of the EIA regulations. Potential effects identified within the assessment as major or moderate are regarded as significant in terms of the EIA regulations. Whilst minor effects (or below) are not significant in EIA terms in their own right, it is important to distinguish these as they may contribute to significant effects cumulatively or through interactions.
- 3.4.69 Following initial assessment, if the effect does not require additional mitigation (or none is possible), the residual effect will remain the same. If, however, additional mitigation is proposed there will be an assessment of the post-mitigation residual effect.

Table 3.16: Impact significance matrix

Sensitivity of receptor	Adverse magnitude				Beneficial magnitude			
	High	Medium	Low	Negligible	Negligible	Low	Medium	High
High	Major	Major	Moderate	Minor	Minor	Moderate	Major	Major
Medium	Major	Moderate	Minor	Minor	Minor	Minor	Moderate	Major
Low	Moderate	Minor	Minor	Negligible	Negligible	Minor	Minor	Moderate
Negligible	Minor	Negligible	Negligible	Negligible	Negligible	Negligible	Negligible	Minor

Table 3.17: Definition of impact significance

Significance	Definition
Major	Very large or large change in receptor condition, both adverse or beneficial, which are likely to be important considerations at a regional or district level because they contribute to achieving national, regional or local objectives, or could result in exceedance of statutory objectives and/or breaches of legislation.
Moderate	Intermediate change in receptor condition, which are likely to be important considerations at a local level.
Minor	Small change in receptor condition, which may be raised as local issues.
Negligible	No discernible change in receptor condition.
No change	No impact, therefore, no change in receptor condition.

Cumulative Effects Assessment Methodology

- 3.4.70 The CEA considers other plans, projects and activities that may impact cumulatively with the Proposed Development. As part of this process, the assessment considers which of the residual impacts assessed for the Proposed Development on its own have the potential to contribute to a cumulative effect. Volume 1, Chapter 5: EIA Methodology provides further details of the general framework and approach to the CEA.
- 3.4.71 For socio-economics, tourism and recreation, the potential cumulative impacts include:
 - Employment and Labour;

- Community and Social Assets; and
- Tourism Economy.

Transboundary Effects Assessment Methodology

- 3.4.72 Volume 1, Chapter 5: EIA Methodology provides details of the general framework and approach to the assessment of transboundary effects.
- 3.4.73 It was identified that there is potential for transboundary impacts upon other economic study areas due to construction and operation and maintenance impacts of the Proposed Development. These include:
- the development, construction and operation of renewable energy generation assets in Morocco; and
 - the installation of an HVDC cable which passes through international waters and near to other countries.
- 3.4.74 Given that these socio-economic impacts are likely to be positive and will happen outside of the UK they have been scoped out.

Assumptions and Limitations of the Assessment

- 3.4.75 Data from official statistical sources, such as the surveys carried out by the Office for National Statistics (ONS), are generally published with a lag of between one and two years. This means that part of the information included in the baseline, while being based on the latest available data, does not reflect current economic activity. To provide the most up to date information possible, the baseline assessment was carried out close to the submission of this PEIR chapter. This will be updated for the submission of the ES.
- 3.4.76 At the time of writing, there was no certainty about the overall expenditure associated with the construction of Proposed Development. General industry data has been used to estimate expenditure, but as the Proposed Development develops the level of expenditure will be further refined. This will be updated for the submission of the ES.
- 3.4.77 The economic model estimating impacts on construction and GVA from the Proposed Development relies on an Input-Output Methodology. One of the main data sources associated with this document is the UK Input-Output Tables, which, while it was last published in 2023, refers to sectoral interactions as of 2019 (ONS 2023).
- 3.4.78 The economic model also relies on assumptions relating to the capabilities of the Devon County Council area to undertake contracts associated with the construction and operation of the Proposed Development.
- 3.4.79 None of the assumptions and limitations listed above is likely to affect the overall assessment of effects from the construction, operation and maintenance phases of the Proposed Development.

3.5 Baseline Environment

Desk Study

3.5.1 Information on socio-economics and tourism within the study area was collected through a detailed review of existing studies and datasets. These are summarised at **Table 3.18**.

Table 3.18: Summary of desk study sources used

Title	Source	Year	Author
Annual Population Survey 2022	ONS	2023	ONS
Business Register and Employment Survey	ONS	2023	ONS
Annual Survey of Hours and Earnings	ONS	2023	ONS
Population estimates 2021 - local authority based by five year age band	ONS	2023	ONS
Population Projections 2018-2043 - local authority based by single year of age	ONS	2020	ONS
The Great Britain Day Visitor Survey 2019	VisitEngland	2020	Kantar TNS
The Great Britain Tourism Survey 2019	VisitEngland	2020	Kantar TNS
International Passenger Survey	ONS	2020	ONS
UK Energy in Brief 2023	Department for Energy Security and Net Zero	2023	Department for Energy Security and Net Zero

Existing Baseline Conditions

3.5.2 This section provides a baseline assessment of the existing environment from the perspective of socio-economics and tourism. The analysis is carried out with reference to the following study areas:

- Local Area, defined as the local authorities of North Devon and Torridge;
- Devon, as represented by the county council area; and
- UK.

3.5.3 The baseline assessment of the housing is conducted at more granular level, with respect to the Local Area, Devon County Council and England.

3.5.4 The relevant statistics included as part of the tourism baseline assessment are reported at Great Britain level. As a result the baseline assessment for the tourism economy is carried out with reference to:

- Local Area, defined as the local authorities of North Devon and Torridge;

- Devon, as represented by the county council area; and
- Great Britain.

Demographics

- 3.5.5 As shown in **Table 3.19**, the Local Area had a population of 169,100, representing 20.5% of the population in Devon (826,319), and 0.2% of the UK's population as a whole. In the same year, Devon accounted for 1.2% of the UK's total population.
- 3.5.6 56.7% and 58.3% of the population were aged between 16-64 in the Local Area and Devon respectively, whereas in the UK this same group accounted for 62.9% of the population, which may suggest a lack of work-related opportunities in the region (Office for National Statistics, 2023). The share of those aged 16 and under was also lower in Devon (15.7%) than in the UK (18.4%).
- 3.5.7 In the same year, the share of the population in the Local Area accounted for by people aged 65 and above was 27.3%, which was higher than that of Devon (26.0%) and the UK (18.7%).

Table 3.19: Population estimates, 2022

	Local Area	Devon	UK
Population	169,100	826,319	67,026,300
% Under 16	16.1%	15.7%	18.4%
% Aged 16-64	56.7%	58.3%	62.9%
% Aged 65+	27.3%	26.0%	18.7%

* UK Population Estimates are for 2021.

Labour Market Performance

- 3.5.8 In 2022, Devon had an economic activity rate of 78.9% compared to the UK's rate of 78.3% (**Table 3.20**). The unemployment rate (2.2%) is significantly lower than for the UK (3.6%), which suggests that the labour market may be relatively tight (Office for National Statistics, 2023). While information is not available at the Local Area level, the estimates for Devon can be used to form a view of more localised trends.
- 3.5.9 However, the median annual gross income of residents living in Devon (£24,733) is 10.9% lower than the median income of UK residents (£33,745). A relatively smaller median annual gross income combined with a lower unemployment rate may be indicative that Devon lacks high-quality employment opportunities (Office for National Statistics, 2023).
- 3.5.10 Over the period between 2011 and 2021, the rate at which jobs have been created was larger across the Devon (+14.3%) than across the UK (+12.9%). This suggests economic activity in the Devon is more dynamic than elsewhere in the UK.

Table 3.20: Labour market performance, 2022

	Devon	UK
Economic Activity Rate	78.9%	78.3%
Unemployment Rate	2.2%	3.6%

	Devon	UK
Median Annual Gross Income, Full-Time Workers	£24,733	£27,774
Job Growth (2011-2021)	14.3%	12.9%

Industrial Structure

- 3.5.11 The share of employment by sector in the Local Area, Devon and UK is shown in **Table 3.21** (Office for National Statistics, 2023). In 2022, the largest sector in the Local Area was wholesale and retail trade, where 14.9% of all those employed worked, higher than the share across Devon (14.8%) and UK (13.9%).
- 3.5.12 Similarly, accommodation and food services were a relatively important sector for employment, with 14.2% of all those employed in this industry in the Local Area, compared to 11.3% in Devon and 7.9% in UK (Office for National Statistics, 2023). These sectors are typically associated with tourism, suggesting the relative importance to the local economy. They often have relatively low levels of productivity and pay.
- 3.5.13 Employment in construction in the Local Area (6.1%) and Devon (6.5%) was also marginally higher than UK (5.0%). There are expected to be opportunities for this sector during the construction phase of the Proposed Development. The Local Area and Devon both have below the average share of employment working in the professional, scientific, and technical industry. Employment in the sector accounted for 5.7% of employment in the Local Area and 6.9% in Devon, compared to 9.0% across UK.
- 3.5.14 The third largest employer in the Local Area is human health and social work, which accounts for 13.9% of overall employment in the area. Although this proportion is higher than Devon as a whole (12.5%), it is a lower proportion than that of UK, where the sector accounts for 13.3% of total employment. In addition, the Local Area has a relatively large share of employment working in agriculture, fishing, and forestry industry (10.0%) compared to Devon (6.1%) and UK (1.5%), reflecting the rurality of the area.

Table 3.21: Industrial structure, 2022

	Local Area	Devon	UK
Wholesale and retail trade; repair of motor vehicles and motorcycles	14.9%	14.8%	13.9%
Accommodation and food service activities	14.2%	11.3%	7.9%
Human health and social work activities	13.9%	12.5%	13.3%
Manufacturing	10.2%	7.6%	7.5%
Agriculture, forestry and fishing	10.0%	6.1%	1.5%
Education	8.5%	9.4%	8.4%
Construction	6.1%	6.5%	5.0%
Professional, scientific and technical activities	5.7%	6.9%	9.0%

	Local Area	Devon	UK
Administrative and support service activities	4.0%	5.2%	8.8%
Transportation and storage	2.6%	4.1%	4.9%
Arts, entertainment and recreation	2.2%	2.7%	2.4%
Public administration and defence; compulsory social security	1.9%	4.1%	4.6%
Real estate activities	1.7%	1.9%	1.9%
Other service activities	1.6%	2.0%	2.0%
Information and communication	1.0%	2.4%	4.4%
Financial and insurance activities	0.7%	1.1%	3.2%
Water supply; sewerage, waste management and remediation activities	0.4%	1.0%	0.7%
Electricity, gas, steam and air conditioning supply	0.3%	0.4%	0.4%
Mining and quarrying	0.0%	0.1%	0.2%
Total Employment	72,000	369,700	32,716,478

GVA by Area

- 3.5.15 As shown in **Table 3.22**, in 2021 the GVA generated within the Local Area stood at £ 2.6 billion, accounting for 18.3% of the GVA generated in Devon (£ 14 billion) and 0.2% of the total GVA generated in the UK (£2,025.6 billion) (ONS, 2023). Over the period 2011 to 2021, GVA has grown by 39% across the UK economy, a faster rate of growth than in the Devon (+32%) and the Local Area (+28%).
- 3.5.16 In the same year, GVA per head of population supported by the Local Area was £23,340 which is lower than GVA per head in Devon (£26,223) and the UK as a whole (£33,745).

Table 3.22: GVA and GVA per head, 2021

	Local Area	Devon	UK
2011 GVA (£ billion)	2.6	14.0	1,459.7
2021 GVA (£ billion)	3.4	18.5	2,025.6
Change (2011-2021)	28%	32%	39%
GVA per Head (£)	23,340	26,223	33,745

Education Levels

- 3.5.17 As shown in **Table 3.23**, in the Local Area, 91% of those in the working age population have achieved an equivalent National Vocational Qualification Level 1 (NVQ1) qualification or higher, a higher share compared to the UK (87%). Similarly, 77% of those in the Local Area achieved an NVQ2 qualification or higher, compared to 81% in Devon and 78% in the UK. The share of the

population who achieved an NVQ3 qualification or higher is slightly lower in the Local Area (55%) when compared to Devon (62%) and the UK (61%).

3.5.18 In the Local Area, 30% of people have achieved at least an NVQ4 qualification, equivalent to a higher education certificate, which is lower than across Devon (39%) and the UK (44%). The share of people who have achieved no qualifications in the Local Area (6%) is broadly similar to that across Devon (6%) and the UK (7%). Overall, the Local Area has on average a lower share of its population with higher education qualifications.

Table 3.23: Qualifications, 2021

	Local Area	Devon	UK
% with no qualifications	6%	6%	7%
% NVQ1+	91%	91%	87%
% NVQ2+	77%	81%	78%
% NVQ3+	55%	62%	61%
% NVQ4+	30%	39%	44%

Pupil Teacher Ratios

3.5.19 As a measure of class size and existing provision, the analysis considers the pupil per teacher ratio. Data are not available at local authority level, so is considered at county level and the regional level and is compared to the UK. Data is considered as an average across nursery, primary and secondary.

3.5.20 Across all educational facilities, in 2022/23 Devon, the South West and England had a similar pupil per teacher ratio of around 18 pupils per teacher.

Table 3.24: Pupil to Teacher Ratio (Qualified), 2022/23

	Devon	South West	England
Pupil to Teacher Ratio	18	17.8	18

Healthcare Provision

3.5.21 North Devon and Torridge form part of the area that is covered by the National Health Service (NHS) Devon Integrated Care Board (ICB). ICBs are responsible for the provision of health and social care services across the region.

3.5.22 As of September 2022, there were 874 General Practitioners (GP) across NHS Devon ICB, with 1,276,248 patients registers at Devon GP practices (NHS Digital 2022). The number of patients per GP was 1,460. Across NHS boards of England, the average number of patients per GP was 1,724 for the same period.

Table 3.25: People per general practitioner, 2022.

	Devon (ICB)	UK
Patients per GP	1,460	1,724

Housing

3.5.23 The affordability and availability of housing in an economy contribute to its sensitivity to change and ability to accommodate new people.

- 3.5.24 The rental market for long term accommodation in the Local Area is small, which reflects the relatively rural and older population as both of these demographics have a lower demand for rental accommodation. In the year from October 2022 to September 2023, there was an average of 142 listings of accommodation for long term rent per month across the Local Area. (Office for National Statistics, 2023). This is a decrease of 32% since 2018/19.
- 3.5.25 Housing is less affordable in the Local Area and Devon than across England. The median house price paid in the Local Area and Devon as of March 2023 was £300,250 and £318,800 respectively, which is 3.5% and 9.9% higher than the national average of £290,000, as set out in Table 3.26 (Office for National Statistics, 2024).
- 3.5.26 Since 2013, the median house price in the Local Area and Devon has increased by 61.5%, higher than that across England (56.8%).

Table 3.26: House price and value and changes

	March 2013	March 2023	Change
Local Area	£185,875	£300,250	61.5%
Devon	£198,600	£318,800	61.5%
England	£185,000	£290,000	56.8%

Tourism Economy

Visitors

- 3.5.27 The Great Britain Day Visitor Survey (GBDVS), the Great Britain Tourism Survey (GBTS) and the International Passenger Survey collect statistics regarding visitor numbers and visitor spend across the UK and in local authorities (**Table 3.27**). In 2019, there were 2.1 million day visits to the Local Area and 0.6 million domestic overnight visitors, representing 14.4% of 33.3% visits to Devon respectively. These visitors generated a total spend of £366.7 million in the Local Area.
- 3.5.28 In 2019, there was a total of 16.8 million visitors to Devon (0.8% of visits to the UK), with tourism spending amounting to £1.0 billion, equal to around 0.9% of the UK total.
- 3.5.29 While international visitor figures specific to the Local Area are not available, day visitors to Devon as a whole accounted for 87% of all visitors and domestic overnight visitors accounted for 11% of visitors. Day visitors accounted for the largest share of spend in Devon (£453.1 million), (Kantar TNS, 2020). Overnight domestic visitors account for expenditure of £401.3 million (Kantar TNS, 2020) and international visitors accounted for expenditure of £192.3 million (Visit Britain, 2020).

Table 3.27: Visitors and tourism spending, 2019

Visits (millions)	Local Area	Devon	GB
Day visits	2.1	14.6	2,043
Domestic Overnight Visitors	0.6	1.8	121
International Overnight Visitors	n/a	0.4	41
Total Visitors	2.7	16.8	2,205

Spend (£ million)	Local Area	Devon	GB
Day visits	94.7	453.1	67,678
Domestic Overnight Visitors	272.0	401.3	24,098
International Overnight Visitors	n/a	192.3	28,303
Total Spend	366.7	1,046.7	120,080

Employment

- 3.5.30 In 2022, the Local Area had employment in accommodation and food service (which is typically associated with tourism) of 10,224, which is equivalent to 14.2% of all employment in the area. This is higher than for the economy of Devon (11.3%) and GB as a whole (7.9%) (Office for National Statistics, 2023). This suggests that the tourism sector in the Local Area is relatively important to the local economy.
- 3.5.31 The tourism sector has grown faster within the Local Area than across the wider UK economy. Between 2015 and 2022, employment in tourism across the Local Area grew from 6,750 to 10,240, a 51% increase, at a time when employment in the sector grew by 14% across the UK.

Tourist Attractions

- 3.5.32 A total of 26 major attractions were identified in the Local Area. These are listed and described in **Table 3.28**.

Table 3.28: Local Area, Top Visitor Attractions

Attraction	Description
Appledore and Northam Burrows	Interesting and scenic coast walk from Westward Ho! to Appledore.
Baggy Point (National Trust)	Headland at Croyde with crashing waves and dramatic cliffs.
Bideford Pannier Market	Victorian Market building hosting 30+ shops and studios as well as markets on Tuesdays and Saturdays.
Braunton Burrows	Braunton Burrows, is one of the largest sand dune systems in the British Isles. At the heart of the North Devon Area of Outstanding Natural Beauty (AONB), it is a UNESCO designated Biosphere reserve.
Burton Art Gallery (Bideford)	The Burton at Bideford is an art gallery and museum.
Church of St Margaret of Antioch (Bideford)	Anglican Parish Church which has been a Grade I listed building since 1951.
Church of St Mary (Bideford)	Parish Church which offers services, baptisms, weddings, and funerals.
Croyde Sands	Croyde Bay is a sandy beach backed by sand dunes and situated in a small bay on the North Devon Coast.
Hockings Dairy Ice Creams (Bideford)	Ice cream vans which are out daily from March to October in Appledore, Bideford, Barnstaple, Ilfracombe, Instow, Torrington and Westward Ho.
Kipling Tors (National Trust)	Walking route next to the sea with views across Bideford Bay and inland to Exmoor. Rudyard Kipling’s novel, <i>Stalky & Co</i> , is based on his school days here.

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Attraction	Description
Lundy Island	Lundy is an island 18km off the coast of Devon. It contains 23 holiday properties and is managed by the Landmark Trust and is popular with bird watchers, walkers and rock climbers.
North Devon Maritime Museum (Bideford)	Maritime history museum in Bideford with several maritime themed exhibits.
Northam Burrows Country Park	Northam Burrows Country Park is a beautiful expanse of common land popular with visitors throughout the year and is a popular walking destination.
Putsborough Sands	Putsborough Sands is a large sandy beach that forms the southern section of Woolacombe Sands, which is popular with surfers.
Royal North Devon Cricket Club (Instow)	North Devon Cricket Club was founded in 1823 and moved to its current ground at Instow in 1836, with cricket being played every year.
RSPB Isley Marsh	Isley Marsh is made up of saltmarsh and intertidal mudflats on the southern edge of the Taw Torridge estuary.
Saunton Golf Club	Based on the coast of North Devon and listed as one of the Best Golf Courses in the UK.
Saunton Sands	Saunton Sands is a beach near the English village of Saunton on the North Devon coast near Braunton, popular for longboard surfing.
Sea Green of Appledore	Based on recycling, Sea Green is a small workshop/gallery in the heart of Appledore.
South West Coast Path	England's longest National Trail of 630 miles around the entire South West peninsula, beginning in Exmoor and ending in Poole Harbour.
St Mary's Church (Appledore)	The Parish Church of Appledore with regular services.
The BIG Sheep Farm and Theme Park	The Big Sheep is an amusement farm park located in Abbotsham. The BIG Sheep is listed as one main attractions in Northern Devon, and includes indoor and outdoor play, rollercoasters and rides, live shows, pony rides, animal barn and feeding and many other attractions including a Brewery and Gin Distillery.
The Sports Ground (Bideford)	The Sports Ground is a football stadium used by Bideford A.F.C. on Kingsley Road in Bideford, Devon.
Ultimate Adventure Centre (Abbotsham)	Adventure Centre offering a comprehensive range of outdoor activities, with accommodation totalling 300 beds, a café and function space.
Victoria Park (Bideford)	Park in Bideford which includes a variety of recreational facilities, a children's play area, an open-air paddling pool and a skateboard park.
Woolacombe Down (National Trust)	Coastline of cliffs, coves, beaches, dunes, and headlands, which is a popular destination for walking.
Woolacombe Sands	Popular sandy beach with family holiday park nearby.

Accommodation Providers

3.5.33 There is a substantial number of accommodation providers in the Local Area. VisitBritain undertakes an accommodation census, which gives the most accurate

available measure of the accommodation stock in English local authorities. This census includes all quality assessed accommodation, listed accommodation in external business databases, and accommodation registered in regional delivery partners of VisitEngland. The last census was conducted in 2016. Whilst the industry has since been adversely affected by the Covid-19 pandemic, it is expected that the overall findings of the report remain applicable to the nature of the accommodation provision in the Local Area.

3.5.34 The study identified a total 1,848 accommodation providers in the Local Area. In North Devon there were 302 serviced accommodation businesses, and 978 non-serviced accommodation providers. In Torridge there were 82 serviced accommodation businesses and 486 non-serviced accommodation providers. A breakdown by type of accommodation businesses is given in **Table 3.29**.

Table 3.29: Summary of visitor accommodation

	North Devon	Torridge	Local Area
Serviced accommodation (hotels and similar establishments)	302	82	384
Non-serviced accommodation (holiday dwellings, tourist campsites)	978	486	1,464
Total	1,280	568	1,848

Walking and cycling routes

3.5.35 There are a variety of walking trails and cycling routes located within North Devon and Torridge. The North Devon Council website (2022) and Torridge Council website (2022) identify several long-distance walking and cycle routes across North Devon and Torridge, including:

- Tarka Trail cycle path;
- The West Country Way cycle path;
- The Devon Coast to Coast cycle route;
- La Velodyssee cycle route;
- Appledore & Northern Burrows walk;
- Codden Hill from Barnstaple Station walk;
- Home Farm Marsh Walk from Barnstaple Station;
- Westward Ho! Kingsley & Kipling walk;
- Westward Ho! to Cornborough Cliffs walk;
- Peppercombe Valley trail;
- Baggy Point circular walk via Bloodhills Cliff;
- Centenary walk at Arlington Court;
- Dunster Castle garden route;
- Deer park walk;
- Baggy Point to Woolacombe circular walk;
- Horner Wood ancient trees walk; and

- Lake walk at Arlington Court.

Factors Driving Tourism Activity

- 3.5.36 Based on existing evidence on tourism and the tourism economy, activity is mostly driven by the following factors:
- The ability and willingness of tourists to travel.
 - Economic performance (and so whether tourists have disposable income available for leisure trips).
 - Exchange rates.
 - The quality of the overall tourism product.
 - The effectiveness of destination marketing.
 - The quality and value for money of the services offered by tourism businesses.
- 3.5.37 No relationship exists between most of these factors and the existence of offshore cable infrastructure or the presence of its onshore infrastructure.
- 3.5.38 In case any evidence was found on changes affecting the existing environment, for a change in tourism activity to happen, the following conditions would need to be met:
- The construction and/or presence of the onshore and offshore infrastructure has some impact(s) on the area.
 - Visitors, or potential visitors are aware of such impact(s).
 - Visitors, or potential visitors, react by changing their behaviour. For example, by changing the length of stay, where they chose to visit or the activities that they undertake.
 - The change in behaviour results in a change in their level of spending.
 - These changes in visitor spending result in a change in performance of the tourism sector, for example, a change in employment.

Future Baseline Conditions

Socio-economics

Demographics

- 3.5.39 Population projections for the period to 2043 (which are the latest available projections and based on 2018 data) forecast an 12.1% increase for the population in the Local Area, which is slightly lower than that of the projected increase for Devon (13.5), but higher than that for the UK as a whole (8.0% increase).
- 3.5.40 Over the same period, the proportion of residents aged 16-64 in the Local Area is projected to decrease by 5.4 percentage points from 56.7% to 51.3%. Devon and the UK follow a similar but less marked trend, with the same demographic in Devon projected to decrease by 4.9 percentage points to 53.5%, and decrease by 3.9 percentage points to 59.0% in the UK as a whole.

3.5.41 It is also projected that the proportion of the residents aged 65+ will increase in the Local Area, with this group expected to account for 33.9% of the total population by 2043, representing an increase of 6.6 percentage points. This is slightly higher than the projections for Devon, where the group is projected to increase by 6.1 percentage points to 32.1% by 2043. This is equivalent to an additional 90,400 people. The UK's share of residents aged 65+ is also expected to increase by 5.3 percentage points to 24.0% of the population in 2043 (Office for National Statistics, 2020).

Table 3.30: Population projections, 2021-2043

	Local Area		Devon		UK	
	2022*	2043	2022*	2043	2021	2043
Total population	169,100	189,578	826,319	938,239	67,026,292	72,417,950
% Aged under 16	16.1%	14.8%	15.7%	14.4%	18.4%	17.0%
% Aged 16-64	56.7%	51.3%	58.3%	53.5%	62.9%	59.0%
% Aged 65+	27.3%	33.9%	26.0%	32.1%	18.7%	24.0%

Key Receptors

- 3.5.42 The principal receptors with respect to socio-economics, tourism and recreation are economic activity (GVA and employment), population, accommodation supply, social infrastructure and tourism and recreation activity.
- 3.5.43 The specific features defined within these receptors as requiring further assessment are listed in **Table 3.31**.
- 3.5.44 The sensitivity and magnitude of the receptors outlined are considered in the assessment of effects.

Table 3.31: Socio-economics and tourism key receptors taken forward to assessment

Receptor Group	Receptor	Relevant Metric
Economic	Economic activity in Devon	Employment, GVA, supply chain activity and development of low-carbon industry.
Economic	Economic activity in the UK	Employment, GVA, supply chain activity and development of low-carbon industry.
Tourism and Recreation Assets	Tourism attraction and recreational facilities	Anticipated change in visitor or user behaviour
Tourism Economy	Tourism activity in the Local Area	Employment and GVA of the tourism sector in the Local Area
Community service and social assets including housing	House prices, health care and education service provision	Relative prices at a local and national level. Pupils to teacher ratio People per GP

3.6 Key Parameters for Assessment

Maximum Design Scenario

- 3.6.1 The final design of the Proposed Development will be confirmed through detailed engineering design studies that will be undertaken post-consent. To provide a precautionary but robust impact assessment at this stage of the development process, a maximum design scenario has been defined. The maximum design scenario (having the most impact) for each individual impact is derived from the Project Design Envelope (PDE), provided in Volume 1, Chapter 3: Project description of the PEIR, to ensure that all other design scenarios will have less or the same impact.
- 3.6.2 The maximum design scenario for the socio-economics, tourism and recreation assessment are summarised in **Table 3.32**.

Table 3.32: Maximum design scenario considered for the assessment of potential impacts

Potential Impact	Phase		Maximum Design Scenario	Justification
	C	O		
<p>Impact 1: increase in economic activity.</p> <p>Direct and indirect Gross Value Added (GVA) generated by the Proposed Development within Devon and the UK.</p> <p>Direct and indirect employment (years of employment) associated with the Proposed Development within Devon and the UK.</p>	✓	✓	<ul style="list-style-type: none"> Conservative assumptions are made with regards to the ability of businesses in Devon to deliver contracts for the Proposed Development. The maximum design scenario includes 2 converter stations, 1.2 km of HVAC cables, 14.5 km of HVDC cables (within the onshore infrastructure area) and 370 km of offshore cables (within UK EEZ). It is considered that a proportion of the workforce for HVDC cable construction will be based in North Ayrshire at Hunterston Cable Factory. The operation and maintenance of the onshore infrastructure area is assumed to be located within Devon and this will stimulate economic activity directly and in the supply chain. However, conservative assumptions are made with regards to the ability of businesses in Devon to deliver specialist contracts for the Proposed Development. 	<p>An economic impact model is used to estimate the GVA and employment generated during the development and construction phase, and the operational phase.</p> <p>The extent of benefits secured in each study area will depend on the ability of local businesses to secure contracts</p>
Impact 2: Impacts on the local tourism sector associated with the Proposed Development.	✓	✓	<ul style="list-style-type: none"> Tourism and recreation impacts are determined by significant environmental effects identified in other chapters, therefore the design parameters that determine these impacts will vary depending on which environmental effect, such as visual impact, is driving the impacts on tourism and recreation assets. 	<p>The assessment considers whether any temporary activity during construction will affect tourism activity.</p>
Impact 3: Impacts to tourism and recreation activities associated with the Proposed Development	✓	✓		
Impact 4: Impacts to community and social assets, including impacts to the local housing market.	✓	×	<ul style="list-style-type: none"> It is considered that the workforce will be a multinational workforce and personnel and technical specialists may not be UK based citizens or residents. 	

3.7 Mitigation Measures Adopted as Part of the Proposed Development

Summary of Mitigation Embedded in the Design

- 3.7.1 For the purposes of the EIA process, the term ‘Measures adopted as part of the Proposed Development’ is used to include the following types of mitigation measures (adapted from IEMA, 2016). These measures are set out within Volume 1, Appendix 3.1: Draft Mitigation Schedule, of the PEIR.
- Primary (inherent) mitigation – measures included as part of the project design. IEMA describes these as ‘*modifications to the location or design of the development made during the pre-application phase that are an inherent part of the project and do not require additional action to be taken*’. This includes modifications arising through the iterative design process. These measures will be secured through the consent itself through the description of the project and the parameters secured in the Development Consent Order (DCO). For example, a reduction in footprint or height.
 - Secondary (foreseeable) mitigation. IEMA describes these as ‘*actions that will require further activity in order to achieve the anticipated outcome*’. These include measures required to reduce the significance of environmental effects (such as lighting limits) and may be secured through an environmental management plan.
 - Tertiary (inexorable) mitigation. IEMA describes these as ‘*actions that would occur with or without input from the EIA feeding into the design process. These include actions that will be undertaken to meet other existing legislative requirements, or actions that are considered to be standard practices used to manage commonly occurring environmental effects*’. It may be helpful to secure such measures through a Construction Environmental Management Plan (CEMP) or similar.
- 3.7.2 The embedded mitigation measures, relevant to the socio-economic assessment that have been incorporated into the design of the Proposed Development include sensitive routing and siting of the Onshore HVDC and HVAC Cable Corridor. An Outline Landscape and Ecological Management Plan will also be developed. This will minimise disruption and mitigate against any significant impacts to recreational users and activities, as identified in the Volume 2, Chapter 8: Land Use.
- 3.7.3 Since many of the receptors considered with respects to socio-economics relate to other topics, mitigation is set out in these chapters. This includes:
- Volume 4, Chapter 2: Landscape, Seascape and Visual Impact Assessment
 - Volume 3, Chapter 5: Shipping and Navigation;
 - Volume 2, Chapter 6: Noise and Vibration;
 - Volume 2, Chapter 8: Land Use; and
 - Volume 2, Chapter 2: Historic Environment.
- 3.7.4 The Applicant will also seek to maximise the local benefits associated with the construction and operation and maintenance, of the Proposed Development. The

Applicant is further committed to consultation with impacted receptors to agree specific mitigation based on the assessment of effects.

Construction

- 3.7.5 The Applicant is committed to managing the construction phase of the Proposed Development in an environmentally sensitive manner. They will meet the requirements of all relevant legislation, codes of practice and standards as identified in the topic chapters of this PEIR and will limit the adverse effects on the local community and environment as far as reasonably practicable.
- 3.7.6 This will include developing a Onshore Construction Environment Management Plan (On-CEMP) and a Construction Traffic Management Plan (CTMP), which will manage traffic and other effects. This includes signposting which routes will be used for vehicle access ahead of time, having set working hours and using temporary haul roads where possible. This is expected to mitigate the potential impacts on tourism businesses.
- 3.7.7 The Applicant will also engage proactively with the community to ensure that they are aware of project timelines and other details of the construction phase, as well as ensuring that the community can inform the process. This will minimise disruption and seek to support local benefits where possible.
- 3.7.8 The Applicant is also committed to maximising the beneficial socio-economic effects of the Proposed Development by taking steps to support local companies to be involved in the supply chain and working with stakeholders to enhance opportunities for local people to access associated employment opportunities. For example, the Applicant is proposing an apprenticeship scheme where young people in the area can acquire technical skills related to cable-laying, specifically related to cable jointing. This is expected to increase the economic impact in Devon and support the development of skills that are in high demand and will be increasingly important as the grid expands.
- 3.7.9 In addition, as part of the construction phase the Applicant will plant vegetation/landscaping to partially screen the Proposed Development. This is expected to mitigate the visual impacts, which may reduce potential tourism-related impacts.

Table 3.33: Construction Mitigation Measures

Measure Adopted	How the Measure Will be Secured
Primary Mitigation	
The design of the proposed Converter Site would include cut and fill earthworks to provide a suitable development platform for the converter stations whilst utilising the local topography to integrate the buildings in the landscape. Additional visual screening in the form of constructed earth bunds will further reduce the landscape and visual impact of the converter stations.	Proposed Development design to be provided and approved as part of the DCO.
Tertiary Mitigation	
An Outline Construction Traffic Management Plan (CTMP) will be prepared and submitted with the application for development consent. CTMP(s) will be developed in accordance	As a requirement

Measure Adopted	How the Measure Will be Secured
with the outline CTMP prior to construction. The CTMP(s) would include measures to reduce disruption and traffic.	through the DCO.
The Applicant will engage with the local community to allow for measures to be developed to ensure that disruption is minimised and that where possible, benefits to the local community are secured.	As a requirement through the DCO.
The Applicant will engage with local companies and stakeholders to help develop a strategy to deliver economic benefits, such as skills development.	As a requirement through the DCO.
An Outline Onshore Construction Environmental Management Plan (On-CEMP) will be prepared and submitted with the application for development consent. An On-CEMP(s) will be developed in accordance with the Outline On-CEMP. The On-CEMP(s) would ensure the construction phase is managed in accordance with standard industry practice and would include measures relating to set construction working hours, management of waste and materials storage, and drainage procedures.	As a requirement through the DCO.

Operation and Maintenance

- 3.7.10 The Proposed Development would be designed to operate on a continuous basis throughout the year. Details of the operation and maintenance activities associated with the Proposed Development, including converter stations, onshore cable route (HVDC and HVAC), and offshore cable route, are in Volume 1, Chapter 3: Project Description.
- 3.7.11 It is expected that during periods of annual (once a year) or biannual (twice a year) maintenance, there may be additional maintenance staff required on-site (approximately 30 to 40 visitors) for 1-2 weeks per converter station. The development of an accommodation plan if required, will help to mitigate any impacts on the tourism sector during these maintenance periods. No other mitigation measures are considered necessary during the operation and maintenance phase.

3.8 Assessment of Construction Effects

- 3.8.1 The preliminary impacts of the construction of the Proposed Development have been assessed. The potential impacts arising from the construction phase of the Proposed Development are listed in **Table 3.32**, along with the maximum design scenario against which each impact has been assessed.
- 3.8.2 A description of the potential effect on receptors caused by each identified impact is shown below.

Economic Activity

Description of Impact

- 3.8.3 The first round of expenditure and economic impact will occur within the organisation of the Applicant and through its directly procured contractors. For the

purposes of the assessment, both the Applicant and its directly procured contractors are considered as one group within the direct impact analysis. This expenditure will generate GVA within these companies, which is measured by the sum of the profits and staff costs that will be stimulated by this turnover.

- 3.8.4 The level of GVA that is supported by a given amount of turnover is dependent on the sector that the company is operating in. To estimate the direct GVA from each of the main contract categories, each contract was split into sub-contracts. Using industry-specific data on turnover and GVA from the Annual Business Survey (ONS, 2022e), turnover/GVA ratios were applied to each specific sub-contract in order to estimate GVA.
- 3.8.5 There would also be knock on effects in the supply chain as these directly procured companies in turn purchase goods and services to support their activities. These effects are estimated by applying Type 1 (Indirect) GVA multipliers, which are sourced from the ONS, to the direct GVA impacts.
- 3.8.6 Those who are directly employed on the Proposed Development, or through the supply chain, will also have an impact on the economy through the spending of their salaries across the economy. This is the induced impact and it is calculated using the Type 2 multipliers, that are based on the Input - Output Tables produced by the ONS.
- 3.8.7 The ONS provide estimates of both the Type 1 (indirect) and Type 2 (induced) multipliers for the UK economy and these have been adjusted for the smaller economies where appropriate.

Estimating Construction Expenditure

- 3.8.8 At the time of writing there was no certainty about the overall expenditure associated with the Proposed Development. General industry data has been used to estimate expenditure, but as the Proposed Development develops the level of expenditure will be updated and included as part of the ES. There are three main areas of expenditure related to the onshore elements of the Proposed Development: the converter stations, the Alverdiscott Substation Connection Development and the HVDC and HVAC cables.
- 3.8.9 The estimated expenditure associated with the construction of the converter stations and the Alverdiscott Substation Connection Development was based on information provided by the Applicant relating to the total expenditure of constructing the UK element of the Proposed Development. Evidence was also taken from the Transmission Estimation Cost Guide 2023 (Midcontinent Independent System Operator, 2023). This is robust framework that derives a cost estimate for a given transmission project based on its main features and components and is produced by a grid operator in North America.
- 3.8.10 Using these two sources alongside BiGGAR Economics' experience of previous projects, a breakdown of contracts by type was estimated. It was estimated that the cost of building the two converter stations and Alverdiscott Substation Connection Development would be £2,108.6 million.
- 3.8.11 For the construction of the cabling, the total expenditure associated with the 14.7km length was based on information provided by the Applicant relating to the overall capital expenditure of the Proposed Development. The total expenditure associated with the construction of the cabling was estimated to be £105.0 million.

Estimating Distribution of Expenditure

- 3.8.12 High level assumptions were made about the types of contracts involved (e.g. construction, equipment and installation) and the share of spending secured in each of the study areas. These assumptions were based on analysis of the industrial baseline in each study area and on work previously undertaken by BiGGAR Economics on similar projects.
- 3.8.13 For construction of the converter stations and Alverdiscott Substation Connection Development, it was estimated that contracts worth £88.0 million would be secured in the Local Area, £166.4 million worth in Devon, and £884.0 million worth in the UK. This is equivalent to 4%, 8% and 42% respectively of the total capital expenditure. The construction of the converter stations, and accompanying civil engineering contracts, is the largest opportunity for the Local Area and Devon as a whole.
- 3.8.14 For construction of the cabling, it was estimated that contracts worth £94.5 million would be secured in the UK, of which £17.3 million would be in Devon and £8.3 in the Local Area, accounting for 90%, 17% and 8% of total capital expenditure respectively. The civil engineering contracts are the largest opportunity for the Local Area and Devon as well as for the UK.
- 3.8.15 Adding together each of the individual onshore elements, the combined cost of developing and constructing the Proposed Development is expected to be £2,213.6 million. It was estimated that the Local Area would secure contracts worth £88.4 million (4%), Devon would secure £183.7 million (8%) and the UK would secure £978.5 million (44%).

Table 3.34: Estimated Share of Contracts Associated with HVDC Converter Stations, Alverdiscott Substation and Cabling

	Local Area	Devon	UK	Total
Converter stations and Alverdiscott Substation Connection Development				
Turnover (£m)	80.0	166.4	884.0	2,108.6
Turnover (%)	4%	8%	42%	
Cabling				
Turnover (£m)	8.3	17.3	94.5	105.0
Turnover (%)	8%	17%	90%	
Total				
Turnover (£m)	88.4	183.7	978.5	2,213.6
Turnover (%)	4%	8%	44%	

Economic Activity Impact

- 3.8.16 Adding together direct, indirect, and induced impacts it was estimated that the total impact of developing and constructing the Proposed Development would be up to £930.7 million GVA and 12,530 years of employment across the UK, of which £97.9 million GVA and 1,200 years of employment could be retained in Devon and £38.2 million GVA and 460 years of employment in the Local Area. Given an 8 year construction period, employment in the Local Area is expected to peak at 110 jobs, while in Devon it is expected to peak at 290 jobs and in the UK at 3,030 jobs.

Table 3.35: Construction Economic Impact (£m) – Onshore Elements

	Local Area	Devon	UK
Direct GVA	28.8	59.8	336.4
Indirect GVA	4.3	17.3	350.8
Induced GVA	5.0	20.8	243.4
Total GVA	38.2	97.9	930.7

Table 3.36: Construction Economic Impact (Years of Employment) – Onshore Elements

	Local Area	Devon	UK
Direct Employment	330	680	4,230
Indirect Employment	60	240	4,990
Induced Employment	60	270	3,300
Total Employment	460	1,200	12,530

3.8.17 For the construction of the offshore corridor and cables (offshore elements of the Proposed Development), a similar approach was followed. Estimates were primarily based information provided by the Applicant relating to the total expenditure of constructing the UK element of the Proposed Development. It was also based on BiGGAR Economics’ experience from previous projects was used to calculate the impact.

3.8.18 On this basis, the total expenditure associated with the 371km length of offshore cable was estimated to be £875.3 million. It was estimated that 62% of this would be secured in the UK as a whole rather than Devon. The manufacturing of electrical equipment contracts is the largest opportunity for the UK.

3.8.19 Adding direct, indirect and induced impacts, it was estimated that the economic impact would be £457.7 million GVA and 2,424 years of employment in the UK. Given an 18-month construction period, employment in the UK is expected to peak at 1,160 jobs.

Table 3.37: Construction Economic Impact (£m) – Offshore Elements

	UK
Direct GVA	180.1
Indirect GVA	138.1
Induced GVA	139.5
Total GVA	457.7

Table 3.38: Construction Economic Impact (Years of Employment) – Offshore Elements

	UK
Direct Employment	1,019
Indirect Employment	671
Induced Employment	735
Total Employment	2,424

Sensitivity of the Receptor

- 3.8.20 Sensitivity of potential socio-economic impacts is assessed on the basis of the conditions set out in **Table 3.11** and the relevant baseline conditions.
- 3.8.21 The socio-economic baseline identified the construction and manufacturing play a relatively more important role in the Local Area and Devon compared with the UK as a whole, with professional service activities being relatively less important. In addition, economic activity and educational profile are broadly in line with the UK average whereas the level of job growth has been higher compared to the UK.
- 3.8.22 In the UK, the socio-economic baseline identified an economy that is well balanced between sectors and educational attainment and jobs growth are, by definition, in line with the UK average.
- 3.8.23 The sensitivity of the economic receptors in the Local Area, Devon and in the UK is **low**.

Magnitude of Impact

- 3.8.24 The development and construction of the Proposed Development is expected to be completed by 2032. The majority of the activity will occur during the construction phase. Socio-economics impacts have been assessed on the basis of direct, indirect and induced impacts and the assessment is based on a 24-month construction period. On the basis of this, magnitude of impact is assessed as medium term. It is at this point that the economic activity supported by the Proposed Development will peak. An indicative programme for the construction of the Proposed Development is described in Volume 1, Chapter 3: Project Description.
- 3.8.25 Impacts are considered across the socio-economics study areas and the associated supply of a range of inputs and services. A comparison of the assessed impact compared to the relevant baseline conditions for each socio-economics study area is considered. Based on the indicative construction programme, at its peak the construction of the onshore elements of the Proposed Development is expected to support the equivalent of £9.3 million in the Local Area, £23.9 million GVA in Devon, and £225.1 million GVA in the UK.
- 3.8.26 In 2021, the GVA of the Local Area was £3,400 million, the GVA of Devon was £18,486 million and that of the UK was £2,025,606 million. On this basis, the GVA attracted by the Proposed Development was greater than 0.25% of the GVA of the Local Area and less than 0.25% of the GVA of Devon and the UK.

Table 3.39: Construction Magnitude of GVA – Onshore Elements

	Local Area	Devon	UK
Peak GVA (£m)	9.3	23.9	225.1
Current GVA of Study Area (2021, £m)	3,400	18,486	2,025,606
Peak GVA as % of Current GVA	>0.25%	<0.25%	<0.25%
Magnitude of Impact	Low (beneficial)	Negligible (beneficial)	Negligible (beneficial)

3.8.27 Similarly, at its peak the construction of the onshore elements of the Proposed Development is expected to support 110 jobs in the Local Area, 290 jobs in Devon and 3,030 across the UK. The level of employment supported is less than 0.25% of employment supported across the economies of all three study areas.

Table 3.40: Construction Magnitude of Employment Impact – Onshore Elements

	Local Area	Devon	UK
Peak Employment (Jobs)	110	290	3,030
Current Jobs	72,000	369,700	31,922,000
Peak Employment as % of Employment	<0.25%	<0.25%	<0.25%
Magnitude of Impact	Negligible (beneficial)	negligible (beneficial)	Negligible (beneficial)

3.8.28 The magnitude of impacts was assessed as **Low (beneficial)** for the Local Area, **negligible (beneficial)** for Devon and **negligible (beneficial)** and medium term for the UK, in line with the criteria outlined in **Table 3.6**.

3.8.29 Following a similar approach, the magnitude of GVA and employment impacts from the offshore elements of the Proposed Development are outlined in **Table 3.41** and **Table 3.42** respectively.

Table 3.41: Construction Magnitude of GVA – Offshore Elements

	UK
Peak GVA (£m)	236.3
Current GVA of Study Area (2021, £m)	2,025,606
Peak GVA as % of Current GVA	<0.1%
Magnitude of Impact	Negligible (beneficial)

Table 3.42: Construction Magnitude of Employment Impact – Offshore Elements

	UK
Peak Employment (Jobs)	1,160
Current Jobs	31,922,000
Peak GVA as % of Current GVA	<0.1%
Magnitude of Impact	Negligible (beneficial)

3.8.30 The impact is predicted to be of national spatial extent and medium term. The magnitude was assessed as **negligible (beneficial)** for the UK.

Significance of the Effect

3.8.31 Overall, the magnitude of the impact in the Local Area is low and the sensitivity of the receptor is **low**. The effects will, therefore, be of **minor (beneficial)** significance. The magnitude of the impact in Devon is **negligible** and the sensitivity of receptor is **low**. The effects will, therefore, be of **negligible (beneficial)** significance, which is not significant. Similarly, the magnitude of the

impact in the UK is **negligible** and the sensitivity of the receptor is **low**. The effect will, therefore, be of **negligible (beneficial)** significance, which is not significant.

Table 3.43: Construction – Significance of Socio-Economics Receptors

	Local Area	Devon	UK
Magnitude of Impact	Low (beneficial)	Negligible (beneficial)	Negligible (beneficial)
Sensitivity of Receptor	Low	Low	Low
Significance of Effect	Minor (beneficial)	Negligible (beneficial)	Negligible (beneficial)

Further Mitigation

3.8.32 The impact of construction activity on the economic activity receptors is expected to be beneficial. For this reason, no mitigation is required.

Tourism and Recreation

3.8.33 Potential effects on the tourism and recreational assets will be based on those receptors identified as significant in the other chapters in the PEIR. These include:

- Volume 4, Chapter 2: Landscape, Seascape and Visual Impact Assessment;
- Volume 2, Chapter 6: Noise;
- Volume 2, Chapter 8: Land Use;
- Volume 2, Chapter 5: Traffic and Transport;
- Volume 2, Chapter 2: Historic Environment; and
- Volume 3, Chapter 5: Shipping and Navigation.

3.8.34 Impacts will occur on tourism and recreation receptors if they are sensitive to changes in environmental factors that will occur because of the Proposed Development and the receptors are considered to experience a significant impact as a result of changes to these environmental factors.

3.8.35 As outlined in **Table 3.31**, the tourism and recreation receptor capture any anticipated change in visitor or user behaviour and outcomes as a result of the Proposed Development. This section will assess the magnitude of those receptors identified as significant in the other chapters in the PEIR as highlighted above.

3.8.36 The majority of the effects from the offshore elements of the Proposed Development are concentrated in the wider UK study area. Therefore, effects on the tourism economy due to the offshore elements of the Proposed Development are not discussed separately.

Sensitivity of Receptor

3.8.37 Many tourism and recreational assets identified in the baseline, including Saunton Sands beach and Croyde Sands, are influenced by a single environmental condition to attract or accommodate visitors and users. Similarly, many have a limited ability to adapt or adjust in response to changes in visitor or user behaviour. This includes the BIG Sheep Theme Park.

3.8.38 The approach outlined in **Table 3.13** would therefore indicate that the tourism and recreation assets of the Local Area could have a medium sensitivity to change.

Magnitude of Impact

3.8.39 The magnitude of potential tourism and recreation impacts is assessed on the basis of the conditions set out in **Table 3.8**, and relevant baseline conditions.

Table 3.44: Significant Effects identified at Tourism Receptors - Construction

	LSVIA	Noise	Land Use	Traffic and Transport	Historic Environment	Shipping and Navigation
Appledore and Northam Burrows	No	No	No	No	No	No
Baggy Point (National Trust)	No	No	No	No	No	No
Bideford Pannier Market	No	No	No	No	No	No
Braunton Burrows	No	No	No	No	No	No
Burton Art Gallery (Bideford)	No	No	No	No	No	No
Church of St Margaret of Antioch (Bideford)	No	No	No	No	No	No
Church of St Mary (Bideford)	No	No	No	No	No	No
Croyde Sands	No	No	No	No	No	No
Hockings Dairy Ice Creams (Bideford)	No	No	No	No	No	No
Kipling Tors (National Trust)	No	No	No	No	No	No
Lundy Island	No	No	No	No	No	No
North Devon Maritime Museum (Bideford)	No	No	No	No	No	No
Northam Burrows Country Park	No	No	No	No	No	No
Putsborough Sands	No	No	No	No	No	No
Royal North Devon Cricket Club (Instow)	No	No	No	No	No	No
RSPB Isley Marsh	No	No	No	No	No	No

	LSVIA	Noise	Land Use	Traffic and Transport	Historic Environment	Shipping and Navigation
Saunton Golf Club	No	No	No	No	No	No
Saunton Sands	No	No	No	No	No	No
Sea Green of Appledore	No	No	No	No	No	No
South West Coast Path	No	No	No	No	No	No
St Mary's Church (Appledore)	No	No	No	No	No	No
The BIG Sheep Farm and Theme Park	No	No	No	No	No	No
The Sports Ground (Bideford)	No	No	No	No	No	No
Ultimate Adventure Centre (Abbotsham)	No	No	No	No	No	No
Victoria Park (Bideford)	No	No	No	No	No	No
Woolacombe Down (National Trust)	No	No	No	No	No	No
Woolacombe Sands	No	No	No	No	No	No
Accommodation Providers	No	No	No	No	No	No

3.8.40 The analysis in Volume 2, Chapter 8: Land Use and Recreation finds no significant impact on long distance routes and National Cycle Routes (including part of the Tarka Trail), other PRoW's and other recreational resources. On this basis, impacts on the tourism economy or specific recreational routes as a result of the Proposed Development are unlikely.

3.8.41 Similarly, the analysis in Volume 2, Chapter 5: Traffic and Transport finds no significant adverse effects. This is the result of a series of mitigation measures the Applicant has embedded within the design of the Proposed Development. These include the commitment to the drafting of an Outline Construction Traffic Management Plan. On this basis, access to tourism and recreation assets in the Local Area is not expected to be particularly impacted by the Proposed Development.

3.8.42 The analysis in Volume 2, Chapter 6: Noise finds a significant impact on residential receptors from construction noise and vibration impacts due to Horizontal Directional Drilling involved in the construction of the Onshore HVDC Cable Corridor landward of the Transition Joint Bay. This chapter also identifies one accommodation provider that is predicted to potentially experience a high

magnitude of impact, for a short term period of time, Robin Hill Farm Cottages, a self-catering provider that will be located approximately 25 m from the boundary of the construction compound. The assessment notes that it is likely the magnitude of these effects will not be as great as initially predicted and very short term in nature, therefore the effect has been assessed as minor adverse and not significant.

- 3.8.43 The assessment of effects from construction activity in Volume 4, Chapter 2: Landscape, Seascape and Visual Impact found significant effects on the county landscape character areas of the Bideford Bay Coast and High Culm Ridges. In Bideford Bay Coast, significant effects were identified in from the rural lanes that connect villages. There are tourism receptors within the Bideford Bay Coast Landscape Character Area, however because the landscape effects are specific to hedgerows, hedgebanks and sunken rural lanes no significant effects have been identified at the receptors listed in **Table 3.44**.
- 3.8.44 In High Culm Ridges, significant effects were identified from ridges divided by small spring-fed tributary streams. The landscape effects were assessed as major adverse by the convertor stations. This will include four accommodation providers that are located less than 1 km from the proposed convertor site locations. These are:
- The Webbery Estate Self Catering Cottages;
 - Bulworthy Forest Lodges;
 - Muirview House B&B and Self Catering; and
 - Stables View Self Catering.
- 3.8.45 While the above accommodation providers are within the vicinity of the convertor site locations, it is not anticipated that there will be significant landscape effects from these properties due to trees and bushes blocking the direct line of site from these properties.
- 3.8.46 Whilst both receptors contribute to the distinctiveness of their respective areas, they are not the primary drivers of attracting people to the area. High Culm Ridges features historic landscape features including bridges, medieval castles and listed buildings. Similarly, Bideford Bay Coast features coastal settlements and open seascape views. On this basis, it is unlikely that the Proposed Development will impact the respective areas ability to attract visitors and users.
- 3.8.47 The visual assessment also found significant effects on North Devon and Torridge District landscape character types. Significant effects were identified from area of elevated land, as a result of the cable corridor crossing the tributaries that form folds in the landscape. Similarly, significant effects were identified from an area of “strong farmed character” as a result of the field boundaries having the potential to be removed to allow for trenched crossings. It is not expected that this will impact the respective area’s ability to attract visitors and users. Similarly, while there are tourism receptors within this area, it is not expected that the specific landscape effects identified in this area will impact on these receptors.
- 3.8.48 The assessment of effects from construction activity in Volume 2, Chapter 2: Historic Environment finds significant effects on designated heritage assets within the 5 km of the converter site due to a change within their setting. This includes scheduled monuments, listed buildings and Registered Historic Parks and Gardens. Examples of listed buildings include local churches and barrows. Scheduled monuments include century garden feature in Kenwith Castle, and Goodborough Castle.

- 3.8.49 Given the environmental conditions have a minor influence on the ability of churches to attract or accommodate visitors and users, it is unlikely that the Proposed Development will impact user behaviour. Similarly, the selected scheduled monuments within 5 km of the converter station attract visitors due to factors beyond environmental conditions. On this basis, impacts on the tourism economy because of the Proposed Development are unlikely.
- 3.8.50 The assessment of effects from construction activity in Volume 3, Chapter 5: Shipping and Navigation finds no significant impact on fishing, commercial or recreational vessels during the construction phase. On this basis, impacts on the tourism economy or specific offshore recreational activities because of the Proposed Development are unlikely.
- 3.8.51 Based on the analysis provided above and evidence from other chapters on potential environmental issues with an effect on tourism and recreation activity, the magnitude of impact with respects to the local tourism and recreation assets was assessed as **Low Adverse**.

Significance of Effect

- 3.8.52 Based on the assessment of sensitivity and magnitude, the effect of the construction of the Proposed Development on tourism and recreation assets was assessed as Minor Adverse – Not Significant with respects to the economy of the Local Area.

Tourism Economy

- 3.8.53 Activity associated with the construction of the Proposed Development may result in changes to the existing environment which could affect individual sites or recreational activities. This, in and of itself, does not necessarily map out to impacts on the tourism economy. Impacts to the tourism economy are considered separately.
- 3.8.54 As outlined in **Table 3.31**, the tourism sector receptor captures any change in tourism spending with knock-on implications on the employment and GVA supported by tourism in the Local Area.

Sensitivity of Receptor

- 3.8.55 The socio-economic baseline has identified that employment in the tourism sector in the Local Area has grown faster (+51%) over the period between 2015 and 2022 than across the UK (+14%).
- 3.8.56 However, the Local Area has on average a lower share of its population with higher education qualifications. Additionally, the economy is particularly reliant on a small number of sectors including tourism.
- 3.8.57 The approach outlined in **Table 3.12** would therefore indicate that the tourism economy of the Local Area could have a medium sensitivity to change.

Magnitude of Impact

- 3.8.58 The magnitude of the impact will depend on how the peak employment and GVA of the tourism sector will be affected. This will be driven by any change in tourism activity and associated spend as a result of the Proposed Development.

- 3.8.59 The current proposals do not include an accommodation strategy for the duration of construction. Tourism accommodation can be booked in advance and on average, there are only 140 rental properties made available in any given month across the Local Area. On this basis, it is reasonable to assume that those workers who do not reside in the Local Area, and are required to be on-site, will be staying in tourism-related accommodation (such as hotels and B&B's) for the duration of the construction period.
- 3.8.60 As outlined in **paragraph 3.8.16** an estimate has been made of construction employment potentially generated by the value of contracts let for the onshore elements of Proposed Development. The scale of investment is expected to give rise to the equivalent of 3,030 jobs in the UK and based on an analysis of the types of contracts involved, it is expected that of these, 680 jobs could be based on site.
- 3.8.61 Based on contract value and type, an analysis of the industrial baseline in each study area and on work previously undertaken by BiGGAR Economics on similar projects, it was estimated that out of the 680 jobs on site, approximately 610 jobs would be filled by workers from outside the Local Area.
- 3.8.62 Note that the methodology used to estimate employment benefits accruing from total value of contracts differs from the Applicant's own estimate of 400 construction staff numbers on site at the peak of activity.
- 3.8.63 Nevertheless, and to provide a conservative estimate of the impact on the tourism economy, the higher figure has been used. Therefore, to examine the potential impact of accommodating up to 610 workers in Devon, it was first necessary to consider the total number of nights that the accommodation will be occupied for. Based on a five-day working week for 50 weeks of a year over the construction period it was estimated that there would be a requirement for 613,000 bednights. During the period of peak activity, this would equivalent to 153,000 bednights per year.
- 3.8.64 It was then necessary to consider the average overnight visitor spend per day. The latest data from VisitBritain (2024) and International Passenger Survey considers a three-year period from 2017 to 2019. Considering the spend and number of nights for both domestic and international visitors, the average overnight visitor spend per day in the Local Area £68.
- 3.8.65 In 2016, the South West Research Company (2016) assessed the economic impact of Devon's Visitor economy on behalf of the Devon Tourism Partnership. The study estimated that 38% of guest spending goes towards accommodation (approximately £21) and 10% goes towards travel (approximately £6). The remaining 52% of guest expenditure goes towards recreational activities (so around £29). This includes hospitality, local retailers, entertainment, and local attractions. Whilst the industry has since been adversely affected by the Covid-19 pandemic, it is expected that the overall findings of the report remain applicable to the nature of the visitor spending in the Local Area.
- 3.8.66 Accommodation that will be used by the workforce will not be available for those wishing to holiday in the Local Area. Tourists spend more in the wider economy, on retail, food and entertainment than a typical construction worker. Therefore, if tourists are displaced, there will be a decrease in income for shops, restaurants and cultural venues.
- 3.8.67 The tourism sector in the Local Area is very seasonal, and while there may be additional accommodation capacity in the winter months, the market during the summer is very constrained and so there is likely to be displacement of tourists

during these months if the accommodation has been prebooked by the construction workers.

3.8.68 If it is assumed that the workforce displaces tourists during the three months of the summer (July August, and September), by multiplying the average overnight spend per visitor (excluding accommodation) and by the total number of nights required across the construction period, it was estimated £2.8 million would be displaced activity.

Table 3.45: Construction – Magnitude of impact on Tourism

	Value
Annual bed nights required	153,000
Share of bed nights resulting in displacement	25%
Number of tourist bed nights displaced	97,500
Average tourist spend per night (non-accommodation)	£29
Displaced Spend in Wider Tourism Sector	£2.8 million
Total Turnover in Non-accommodation	£263.3 million
Displaced Spend as % Turnover	0.4%

3.8.69 The approach outlined in **Table 3.13** would therefore indicate that the magnitude of the effect on the tourism economy of the Local Area, excluding accommodation providers, would be **Low**.

Significance of Effect

3.8.70 Based on the assessment of sensitivity and magnitude, the effect of the construction of the Proposed Development on the tourism economy, in particular the shops, restaurants and entertainment venues, was assessed as **Moderate (Adverse)** and is considered not significant.

Table 3.46: Construction – Significance of Tourism Economy Effects

	Local Area
Magnitude of Impact	Low (Adverse)
Sensitivity of Receptor	Medium
Significance of Effect	Minor (Adverse)

Community and Social Assets and Local Housing Market Impacts

3.8.71 The potential for an influx of transient workers having an impact on the local housing market has been scoped into this assessment for the Local Area and Devon County Council Area. This assessment considers the potential impacts associated with a change in demand for housing, educational and healthcare services.

Sensitivity of Receptor

3.8.72 The sensitivity of community and social assets is discussed in **Table 3.14**.

- 3.8.73 The sensitivity of healthcare provision in the area has been assessed as **negligible** and the sensitivity of education provision has been discussed as **low** in line with the criteria set out in **Table 3.14**.
- 3.8.74 Due to the house prices increasing at higher rate to the national average, the sensitivity of the local housing market has been assessed as **medium**.

Magnitude of Impact

- 3.8.75 The potential change in demographics as a result of the development and construction of the Proposed Development is linked to the number of jobs that are supported.
- 3.8.76 It is expected that the peak employment for the onshore elements supported in the Local Area and the area of Devon County Council will be 300 and 780 jobs, respectively. On average, the population in the Local Area is expected to grow by approximately 976 people a year. Similarly, the population in North Devon Council Area is expected to grow by approximately 5,331 people a year. In the unlikely event that all of these jobs supported during the construction and development phase were transient, this would be equivalent to 47% of the projected annual population growth in the Local Area and 23% of the projected annual population growth of the Devon County Council Area.
- 3.8.77 In line with the criteria outlined in **Table 3.9**, the magnitude of this effect in the Local Area has been assessed as **low (beneficial)** and the effect in Devon County Council Area as **negligible (beneficial)**.

Significance of Effect

- 3.8.78 Overall, the magnitude of the impact in the Local Area is **low** and **negligible** in Devon, whereas the sensitivity of the receptors is **medium**. The effects will, therefore, be of **minor significance**.
- 3.8.79 Within the local area, there is potential for the significance of the effect to be greater in certain communities where accommodation provision is concentrated.

3.9 Assessment of Operational Effects

- 3.9.1 The impacts of the operation and maintenance phase of the Proposed Development have been assessed. The potential impacts arising from the operation and maintenance phase of the Proposed Development are listed in **Table 3.32**, along with the maximum design scenario against which each impact has been assessed.
- 3.9.2 A description of the potential effect on receptors caused by each identified impact is given below.

Economic Activity

- 3.9.3 As part of the operation of the onshore elements of the Proposed Development, it is expected that around 24 people will be employed throughout the year. As some of these roles are likely to be part-time (e.g. periodic maintenance), it is anticipated that the full-time equivalent would be up to 15 jobs, predominantly in maintenance and security. The direct GVA of this employment was estimated by

applying employment costs per employee, and as a result it was estimated that the direct economic impact would be £0.4 million.

- 3.9.4 As with the development and construction impact, there would be indirect and induced impacts associated with the operation of the Onshore elements of the Proposed Development. On this basis, it was estimated that the total annual operational impact would be £0.6 million GVA and 19 jobs in the Local Area, £0.7 million GVA and 24 jobs in Devon as a whole, and £1.2 million GVA and 37 jobs in the UK.

Table 3.47: Operations and Maintenance Economic Impact (£m) – Onshore Elements

	Local Area	Devon	UK
Direct GVA	0.4	0.4	0.4
Indirect GVA	0.0	0.1	0.3
Induced GVA	0.1	0.2	0.4
Total GVA	0.6	0.7	1.2

Table 3.48: Operations and Maintenance Economic Impact (Years of Employment) – Onshore Elements

	Local Area	Devon	UK
Direct Employment	15	15	15
Indirect Employment	1	2	10
Induced Employment	3	6	12
Total Employment	19	24	37

- 3.9.5 The operational and maintenance impact of the offshore elements of the Proposed Development was calculated based on BiGGAR Economics’ experience, following a similar approach and assuming that total operational and maintenance costs will be approximately £10 million per year (vessels costs account for the largest share).
- 3.9.6 On this basis, the direct GVA was estimated that the direct economic impact would be £5.7 million in the UK. Adding indirect and impacts associated with this activity, it was estimated that the total annual operational impact would be £12.9 million GVA and 253 jobs across the UK.

Table 3.49: Operations and Maintenance Economic Impact (£m) – Offshore Elements

	UK
Direct GVA	5.7
Indirect GVA	3.9
Induced GVA	3.3
Total GVA	12.9

Table 3.50: Operations and Maintenance Economic Impact (Years of Employment) – Offshore Elements

	UK
Direct Employment	110
Indirect Employment	72
Induced Employment	72
Total Employment	253

Sensitivity of Receptor

3.9.7 Following a similar approach to the construction phase in **paragraph 3.8.20** the sensitivity of the receptors is **low** in the Local Area and Devon and **low** in the UK.

Magnitude of Impact

3.9.8 Economic activity impacts have been assessed on the basis of direct, indirect and induced impacts and the assessment is based on a 50-year operational lifetime. On the basis of this, magnitude of impact is assessed as long term. The majority of operations and maintenance activities will be on a continuous rolling programme. The impact is therefore continuous.

3.9.9 The magnitude of the economic impact from the expenditure during the operations and maintenance phase has been estimated in line with the methodology outlined in **section 3.4**. For the purposes of assessment, only the direct and indirect economic impacts are considered when determining the magnitude of the impact.

Table 3.51: Operations and Maintenance Magnitude of GVA – Onshore Elements

	Local Area	Devon	UK
GVA Impact (£m)	0.5	0.6	0.7
Current GVA of Study Area (2021, £m)	3,400	18,486	2,025,606
Peak GVA as % of Current GVA	<0.1%	<0.1%	<0.1%
Magnitude of Impact	Negligible (beneficial)	Negligible (beneficial)	Negligible (beneficial)

Table 3.52: Operations and Maintenance Magnitude of Employment Impact – Onshore Elements

	Local Area	Devon	UK
Job Impact (£m)	16	17	25
Current total Jobs in Study Area	72,000	369,700	31,922,000
Peak GVA as % of Current GVA	<0.1%	<0.1%	<0.1%
Magnitude of Impact	Negligible (beneficial)	Negligible (beneficial)	Negligible (beneficial)

3.9.10 In line with the approach outlined in **Table 3.6**, the magnitude of economic activity impacts from the onshore elements of the Proposed Developments was assessed as **negligible (beneficial)** for the Local Area, **negligible (beneficial)** for Devon and **negligible (beneficial)** for the UK.

3.9.11 Similarly, the magnitude of impacts from the offshore elements of the Proposed Development was assessed as **negligible (beneficial)** for the UK.

Table 3.53: Operations and Maintenance Magnitude of GVA – Offshore Elements

	UK
GVA Impact (£m)	9.6
Current GVA of Study Area (2021, £m)	2,025,606
Peak GVA as % of Current GVA	<0.1%
Magnitude of Impact	Negligible (beneficial)

Table 3.54: Operations and Maintenance Magnitude of Employment Impact – Offshore Elements

	UK
Job Impact (£m)	182
Current total Jobs in Study Area	32,172,341
Peak GVA as % of Current GVA	<0.1%
Magnitude of Impact	Negligible (beneficial)

Significance of Effect

3.9.12 Overall, the magnitude of the impacts in the Local Area and Devon is **negligible** and the sensitivity of the receptors is **low**. The effect will, therefore, be of **negligible (beneficial)** significance for both study areas, which is not significant. Similarly, the magnitude of the impact in the UK is **negligible** and the sensitivity of the receptor is **low**. The effect will, therefore, be of **negligible (beneficial)** significance, which is not significant.

Table 3.55: Operations and Maintenance – Significance of Socio-Economics Receptors

	Local Area	Devon	UK
Magnitude of Impact	Negligible (beneficial)	Negligible (beneficial)	Negligible (beneficial)
Sensitivity of Receptor	Low	Low	Low
Significance of Effect	Negligible (beneficial)	Negligible (beneficial)	Negligible (beneficial)

Further Mitigation

3.9.13 The impact of construction activity on the economic activity receptors is expected to be beneficial. For this reason, no mitigation is required.

Tourism and Recreation

3.9.14 It is not anticipated that there will be any significant impacts on the tourism sector as a result of the operation of the Proposed Development. However, any potential effects on the tourism sector will be based on those receptors identified as significant in the other chapters in the PEIR. These include:

- Volume 4, Chapter 2: Landscape, Seascape and Visual Impact Assessment;
- Volume 2, Chapter 6: Noise;
- Volume 2, Chapter 8: Land Use;
- Volume 2, Chapter 2: Historic Environment; and
- Volume 3, Chapter 5: Shipping and Navigation.

3.9.15 The majority of the effects from the offshore elements of the Proposed Development are concentrated in the wider UK study area. Therefore, effects on the tourism economy due to the offshore elements of the Proposed Development are not discussed separately.

Sensitivity of Receptor

3.9.16 Many tourism and recreational assets identified in the baseline, including Saunton Sands beach and Croyde Sands, are influenced by a single environmental condition to attract or accommodate visitors and users. Similarly, many have a limited ability to adapt or adjust in response to changes in visitor or user behaviour. This includes the BIG Sheep Theme Park.

3.9.17 The approach outlined in **Table 3.13** would therefore indicate that the tourism and recreation assets of the Local Area could have a medium sensitivity to change.

Magnitude of Impact

3.9.18 Magnitude of potential tourism and recreation impacts is assessed on the basis of the conditions set out in **Table 3.8**, and relevant baseline conditions.

3.9.19 The analysis in **Volume 2, Chapter 8: Land Use** finds there would be no additional impacts on land use and recreational resources to those assessed in

the construction phase. The assessment of construction effects identified no significant impact on long distance routes and National Cycle Routes (including part of the Tarka Trail), other PRoW's and other recreational resources. On this basis, impacts on the tourism economy or specific recreational routes as a result of the Proposed Development are unlikely.

- 3.9.20 Similarly, the analysis in Volume 2, Chapter 5: Traffic and Transport finds no significant adverse effects. On this basis, impacts on the recreational access as a result of the Proposed Development are unlikely.
- 3.9.21 The analysis in Volume 2, Chapter 6: Noise finds no significant impact on residential receptors from operational noise impacts due to the Converter Site and the Alverdiscott Substation Connection Development. On this basis, disruption to tourism and recreation assets is not expected to be impacted during the operation of the Proposed Development.
- 3.9.22 The assessment of effects from operational activity in Volume 4, Chapter 2: Landscape, Seascape and Visual Impact found significant effects on the county landscape character areas of High Culm Ridges. In particular, this relates to farmland in pastoral use. As with the effects during the construction phase, the tourism receptors that are within 1 km of the converter stations will be shielded from direct view as a result of trees and hedges blocking visibility. Therefore the impacts have been assessed as negligible from these locations.
- 3.9.23 The visual assessment also found locally significant effects on the level of visual tranquillity in the North Devon Biosphere Reserve.
- 3.9.24 The assessment of effects from operational activity in Volume 2, Chapter 2: Historic Environment finds significant effects on designated heritage assets within the 5 km of the converter site due to a change within their setting. This includes scheduled monuments, listed buildings and Registered Historic Parks and Gardens. Examples include local churches, barrows, and buildings of historical importance.
- 3.9.25 The designated heritage sites station attract visitors due to factors beyond environmental conditions. On this basis, impacts on the tourism economy because of the Proposed Development are unlikely.
- 3.9.26 The assessment of effects from construction activity in Volume 3, Chapter 5: Shipping and Navigation finds no significant impact on fishing, commercial or recreational vessels during the operational phase. On this basis, impacts on the tourism economy or specific offshore recreational activities as a result of the Proposed Development are unlikely.
- 3.9.27 Based on the analysis provided above and evidence from other chapters on potential environmental issues with an effect on tourism activity, the magnitude of impact with respects to the local tourism and recreation economy was assessed as **Low Adverse**.

Significance of Effect

- 3.9.28 Based on the assessment of sensitivity and magnitude, the effect of the construction of the Proposed Development on tourism economy was assessed as Minor Adverse – Not Significant with respects to the economy of the Local Area.

Tourism Sector

- 3.9.29 Potential effects on the tourism and recreation assets will be based on those receptors identified as significant in the other chapters in the PEIR. These include:
- Volume 4, Chapter 2: Landscape, Seascape and Visual Impact Assessment;
 - Volume 2, Chapter 6: Noise;
 - Volume 2, Chapter 8: Land Use;
 - Volume 2, Chapter 2: Historic Environment; and
 - Volume 3, Chapter 5: Shipping and Navigation.

Sensitivity of Receptor

- 3.9.30 As outlined in the approach in **Table 3.12** would therefore indicate that the tourism economy of the Local Area could have a medium sensitivity to change.

Magnitude of Impact

- 3.9.31 The magnitude of impact is determined by how the Proposed Development would impact the key drivers of the tourism economy in the Local Area or could reduce visitor numbers by reducing the level of accommodation that is available.
- 3.9.32 It is not expected that there will be significant effects on any of the drivers of the tourism sector in the Local Area.
- 3.9.33 The operational phase will not result in a large transient workforce and therefore there is unlikely to be any displacement of tourists from visitor accommodation.
- 3.9.34 Therefore the magnitude of the impact of the Proposed Development during the operational phase has been assessed as negligible.

Significance of Effect

- 3.9.35 Based on the assessment of sensitivity and magnitude, the effect of the construction of the Proposed Development on tourism economy was assessed as Negligible – Not Significant with respects to the economy of the Local Area.

Energy

- 3.9.36 In conjunction with other elements of the overall programme of investments, the Proposed Development is expected to support the delivery of 25 TWh of electricity in the UK. This is equivalent to powering 7 million homes, or 8% of GB's current electricity needs (Xlinks, 2023). Because of the reliability of sun and wind at the site in Morocco, it is anticipated that the energy output will be highly consistent.

Sensitivity of Receptor

- 3.9.37 To assess the potential significance of the Proposed Development requires an assessment of the sensitivity of British electricity consumers (this section refers to the Britain rather than the UK, as the island of Ireland has unified grid). As has been demonstrated by the recent response to the Russia-Ukraine crisis and changes in wholesale gas prices, the British grid is highly exposed to global

volatility due to the prominent role of natural gas in the energy system. This suggests that it has relatively little capacity to absorb change and therefore the sensitivity has been assessed as **medium**.

Magnitude of Receptor

- 3.9.38 While the price that British consumers pay for electricity delivered by the Proposed Development will depend on commercial arrangements that are not yet finalised, it is expected that the Proposed Development will deliver energy at a competitive price. By providing additional capacity and competing with existing sources of energy, the Proposed Development is expected to reduce the market price of electricity for British consumers, while having zero emissions.
- 3.9.39 This is supported by evidence submitted by the National Grid ESO, which suggests flexibility in the energy system could provide cumulative savings to consumers of £17-40bn between 2020 and 2050 (National Grid, 2020). Similarly, modelling by Imperial College London (2015) for the Committee on Climate Change indicates that the total gross benefits of increasing flexibility in the core power sector (based on an average grid intensity of 100 g/kWh in 2030) is between £3bn and £3.8bn per year. MacIver et al. (2021) also indicates that cross-border electricity interconnectors, by providing low-cost electricity, can lead to consumer savings; there are some countervailing effects, due to high European energy prices, where increased cross-border electricity interconnection may increase the price of electricity for GB consumers as electricity is exported from GB, but this is unlikely to apply to the Proposed Development, which is focused on importing energy to the UK from Morocco
- 3.9.40 In addition, it is anticipated that the Proposed Development will improve the diversification of energy supply, increasing its robustness and reducing exposure to volatility in wholesale energy markets.
- 3.9.41 As a result, the magnitude of impact on the British consumers is expected to be **high**.

Significance of Effect

- 3.9.42 Overall, the magnitude on the impact on British consumers is **high** and the sensitivity of the receptor is **medium**. The effect will, therefore, be of **major (beneficial)** significance.

3.10 Cumulative Environmental Assessment

- 3.10.1 The socio-economics and tourism CEA methodology has followed the methodology set out in Chapter 5: EIA methodology of the PEIR. As part of the assessment, all projects and plans considered alongside the Proposed Development have been allocated into 'tiers' reflecting their current stage within the planning and development process.
- 3.10.2 **Table 3.56** considers the potential for the impacts assessed as part of the project to lead to cumulative effects in conjunction with other projects.

Table 3.56: Potential cumulative effects considered for socio-economics, tourism, and recreation

Impact	Potential for cumulative impact	Rationale
Construction		
Expenditure	Yes	Multiple construction projects have the potential to lead to the attraction of investment and to strengthen local supply chains, with implications on the level of GVA supported by each project.
Employment	Yes	Multiple construction projects have the potential to lead to the attraction of investment and to strengthen local supply chains, with implications on the level of employment supported by the construction of each project.
Community and social assets, including housing	Yes	Multiple projects have the potential, if concentrated around the same port location, to increase pressure on existing public service provision. During the peak of construction, it is expected that there will be increased demand for short-term accommodation, such as hotels, bed and breakfasts, and caravan parks.
Tourism and Recreation assets	Yes	Construction activity associated with multiple projects may have an impact on recreational activities.
Operations and Maintenance		
Expenditure	Yes	Operational activity associated with multiple projects has the potential to create a stream of economic activity within the locations chosen as operations and maintenance ports.
Employment	Yes	Operational activity associated with multiple projects has the potential to create permanent employment within the locations chosen as operations and maintenance ports. In addition, local specialisation and clusters may lead to re-skilling and up-skilling of local populations.
Tourism and Recreation	Yes	Operational activity associated with multiple projects may have an impact on marine recreational activities

3.10.3 The list of development considered within the CEA for socio-economics, tourism and recreation are all those listed in the long-list in Volume 1, Appendix 5.3: CEA Matrix.

3.11 Cumulative Effects Assessment

- 3.11.1 A description of the significance of cumulative effects upon socio-economics, tourism and recreation receptors arising from construction and operation is given below. All Tier projects have been assessed together across the construction and operation and maintenance phases of the Proposed Development.
- 3.11.2 It is likely that due to the increased number of offshore projects in the local area, there will be increased competition for labour for onshore civil engineering works. The assessment in the previous socio-economics and tourism sections concluded that there is no significant effect that needs to be taken into consideration in the cumulative assessment.
- 3.11.3 It is unlikely that there will be significant cumulative effects from the offshore elements of the Proposed Development, particularly in Devon as the majority of the economic activity will take place across the UK.
- 3.11.4 The cumulative effect for tourism was considered previously in the individual assessment for the local tourism economy, highlighting impacts that were not present in the absence of the Proposed Development.

Cumulative Impact 1: Economic Expenditure

- 3.11.5 The main opportunity linked with the delivery of the Proposed Development's infrastructure will come from the development of the supply chain and secure long term opportunities associated with other major developments. The delivery of the Proposed Development was assessed as resulting in a minor beneficial effect in the Local Area and a negligible effect on economic activity at UK level.
- 3.11.6 The other developments identified within the cumulative list are:
- comparable in nature compared to the Proposed Development's infrastructure, as will all have demand for civil engineering, electrical and other general construction work; and
 - may be constructed either at the same time construction starts on the Proposed Development's infrastructure or in the years before and after.
- 3.11.7 Therefore, it is likely there will be competition for both competition for labour resources as a result of these other projects and an incentive to invest in growing supply chain capacity in the Local Area.

Significance of Effect

- 3.11.8 Based on the projects identified and both the beneficial and adverse implications of a pipeline of civil engineering and electrical contracts within the Local Area, the cumulative effect from the economic expenditure associated with construction activity was assessed as negligible with respects to the Local Area's and the UK economy

Cumulative Impact 2: Employment

- 3.11.9 The main opportunity linked with the delivery of the Proposed Development's infrastructure will come from the development of the supply chain and secure long term opportunities associated with other major developments. The delivery of the

Proposed Development's was assessed as resulting in a minor beneficial effect in the Local Area and a negligible effect on economic activity at UK level.

3.11.10 The other developments identified within the cumulative list are:

- comparable in nature compared to the Proposed Development's infrastructure, as will all have demand for civil engineering, electrical and other general construction work; and
- may be constructed either at the same time construction starts on the Proposed Development's infrastructure or in the years before and after.

3.11.11 Therefore, it is likely there will be competition for both competition for labour resources as a result of these other projects and an incentive to invest in growing supply chain capacity in the Local Area.

Significance of Effect

3.11.12 Based on the projects identified and both the beneficial and adverse implications of a pipeline of civil engineering and electrical contracts within the Local Area, the cumulative effect from the employment with construction activity was assessed as negligible with respects to the Local Area's and the UK economy

Cumulative Impact 3: Community and Social Assets, including Housing in Construction Phase

3.11.13 The potential for a significant influx of transient workers having an impact on community and social assets has been scoped into this assessment. This section considers the potential impacts associated with a change in demand for housing, educational and healthcare facilities.

Significance of Effect

3.11.14 It is unlikely that the cumulative developments will lead to any additional impacts on community and social assets during their construction. Therefore the cumulative impact on community and social assets, including housing, has been assessed as **minor significance**.

Cumulative Impact 4: Tourism and Recreation

3.11.15 The construction of a series of developments may, in theory, result in the disruption of tourism and recreation assets.

3.11.16 The primary concern will be the impact on the availability of tourism accommodation and the displacement of leisure visitors to the area. Many of the other projects that are included in the CEA will also require a transient workforce during the construction phase. The potential effects on the tourism economy for these projects will depend on the accommodation strategies that are adopted by the other developers and the level of labour which is secured locally for these projects.

Significance of Effect

- 3.11.17 Data is not available on the scale of the workforce that will be required to construct the other projects considered in the CEA. However, the assessment described in Table 3.45 shows that the workforce for the Proposed Development is expected to displace tourists and reduce spending in the tourism economy by 0.4%. It is reasonable to assume that if the transient workforce from the other projects also used tourism accommodation, the resulting cumulative displacement would be greater than 0.5% of the turnover in the tourism sector.
- 3.11.18 Therefore, the magnitude of the cumulative impact would be high and the significance of the cumulative effect would be **Moderate (Adverse)**.

Summary

- 3.11.19 This chapter has investigated the potential effects on socio-economic, tourism and recreation receptors arising from the Proposed Development. The impacts considered include those brought about directly as well as indirectly.
- 3.11.20 This chapter has set economic activity in the context of the areas it will affect. The Proposed Development has an impact on the socio-economy, tourism and recreation of the Local Area, Devon and the UK. The Local Area has a more imbalanced population structure than the rest of the UK, with a larger share of people aged 65+ years old. These trends are set to reinforce in the future, which points to the importance for these areas to attract high value economic activity.
- 3.11.21 In addition to supporting population retention and attraction, the economic opportunities associated with offshore wind could support an increase in the GVA per head and salaries across the Local Area. The two areas currently lag the UK average on these indicators of economic activity.
- 3.11.22 The assessment of cumulative impacts from the Proposed Development and other developments and activities concluded that activity associated with construction and development and the operations of multiple offshore wind sites could lead to further beneficial effects. This is expected to happen through the development of local supply chains facilitated by the existence of a pipeline of offshore wind projects.

3.12 Transboundary Effects

- 3.12.1 A screening of transboundary impacts has been carried out and has identified that there was no potential for significant transboundary effects with regard to socio-economics and tourism from the Proposed Development upon the interests of other states.
- 3.12.2 A screening of transboundary impacts has been carried out and any potential for significant transboundary effects with regard to socio-economics and tourism from the Proposed Development upon the interests of other states has been assessed as part of this PEIR. The potential transboundary impacts assessed within Volume 1, Appendix 5.3: Transboundary screening.
- 3.12.3 Potential transboundary socio-economics and tourism impacts upon other states may arise through the purchase of the components of the Proposed Development, equipment and the sourcing of labour from companies based outside the UK (e.g. in Morocco). The sourcing of materials and labour from other states is assumed to

provide beneficial effects to the economies of said states, and so the consideration of measures envisaged to reduce or eliminate such effects is not relevant in the context of transboundary impacts. These impacts are outside the study areas considered in the socio-economics and tourism assessment and thus, not discussed further.

3.13 Inter-related Effects

- 3.13.1 Inter-relationships are the impacts and associated effects of different aspects of the Proposed Development on the same receptor.
- 3.13.2 A description of the likely interactive effects arising from the Proposed Development on socio-economics and tourism is provided in Volume 4, Chapter 5: Inter-related effects of the PEIR.
- 3.13.3 While impacts related to socio-economics and tourism and energy are not expected to have any substantial inter-relationship with other topic areas, effects related to traffic, noise and visual impact may affect some tourism related businesses.
- 3.13.4 Other topic areas, including Commercial Fisheries and Shipping and Navigation is also expected to have inter-relationship impacts related to economic activity, specifically, GVA and employment impacts.

3.14 Summary of Impacts, Mitigation Measures and Monitoring

- 3.14.1 **Table 3.57** presents a summary of potential effects of the Proposed Development on socio-economics, tourism, and recreation.

Table 3.57: Summary of potential socio-economic, tourism and recreation effects

Receptor	Sensitivity of receptor	Description of impact	Short / medium / long term	Magnitude of impact	Significance of effect	Significant / Not significant	Notes
Construction phase							
Economic Impact and increased employment from onshore activity in the Local Area	Low	£38.2 million GVA and 460 years of employment in the Local Area	Medium	Low	Minor	Not significant	Beneficial
Economic Impact and increased employment from onshore activity in Devon	Low	£97.9 million GVA and 1,200 years of employment in Devon	Medium	Negligible	Negligible	Not significant	Beneficial
Economic Impact and increased employment from onshore activity in the UK	Negligible	£930.7 million GVA and 12,530 years of employment in the UK	Medium	Negligible	Negligible	Not significant	Beneficial
Economic Impact and increased employment from offshore activity in the UK	Negligible	£457.7 million GVA and 2,424 years of employment in the UK	Medium	Negligible	Negligible	Not significant	Beneficial
Impact on tourism economy	Medium	Reduction in tourism sector turnover due to displacement of visitors accommodation	Medium	Low	Minor	Not significant	Adverse
Impact on tourism and recreational assets	Medium	Change in visitor or user behaviour	Medium	Low	Minor	Not significant	Adverse
Impact on local housing market	Medium		Medium	Negligible	Minor	Not significant	

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Receptor	Sensitivity of receptor	Description of impact	Short / medium / long term	Magnitude of impact	Significance of effect	Significant / Not significant	Notes
Operational phase							
Economic Impact and increased employment from onshore activity in the Local Area	Low	£0.6 million GVA and 19 jobs in the Local Area	Long	Negligible	Negligible	Not significant	Beneficial
Economic Impact and increased employment from onshore activity in Devon	Low	£0.7 million GVA and 24 jobs in Devon	Long	Negligible	Negligible	Not significant	Beneficial
Economic Impact and increased employment from onshore activity in the UK	Negligible	£1.2 million GVA and 37 jobs in the UK	Long	Negligible	Negligible	Not significant	Beneficial
Economic Impact and increased employment from offshore activity in the UK	Negligible	£12.9 million GVA and 253 jobs in the UK	Long	Negligible	Negligible	Not significant	Beneficial
Impact on tourism economy	Medium	Change in economic growth per capita of the tourism sector	Long	Negligible	Minor	Not significant	Adverse
Impact on tourism and recreational assets	Medium	Change in visitor or user behaviour	Long	Low	Minor	Not significant	Adverse
Impact on British energy consumers	Medium	Lower energy prices and increased security of supply	Long	High	Major	Significant	Beneficial

3.15 Next Steps

- 3.15.1 Following the preparation of the PEIR, a further analysis of cumulative developments will be undertaken to assess whether there will be any significant impacts associated with the need for temporary workers accommodation that requires consideration within the ES.

3.16 References

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