



The Great Grid Upgrade

Sea Link

Sea Link

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Executive Summary

Ex1.1 Introduction

- Ex1.1.1 This Technical Note provides additional information to support the assessment of visitor and tourism impacts associated with the Proposed Project in Suffolk. It responds to concerns raised by Suffolk County Council (SCC) and East Suffolk Council (ESC) regarding potential adverse effects on visitor numbers, spending, and perceptions of the Suffolk & Essex Coast & Heaths National Landscape.
- Ex1.1.2 The paper expands upon the assessment provided in **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]** as part of the Environmental Statement (ES) and focuses on three key areas: impacts on visitor attractions, tourist accommodation, and visitor perception.

Ex1.2 Regulatory and Planning Policy Context Review

- Ex1.2.1 The assessment is framed by a review of relevant national, regional, and local planning policies. These include the Overarching National Policy Statement for Energy (EN-1) (Department for Energy Security & Net Zero, 2023), the National Planning Policy Framework (NPPF) (Ministry of Housing, Communities & Local Government, 2025), and East Suffolk's Local Plan, Visitor Economy Strategy, Cultural Strategy, and Saxmundham Neighbourhood Plan. These policies collectively emphasise the importance of safeguarding tourism assets, as well as supporting community infrastructure, and mitigating adverse socio-economic effects. The assessment aligns with these policy objectives by demonstrating that the Proposed Project will not detract from the area's visitor appeal or tourism infrastructure.

Ex1.3 Assessment of Visitors and Tourism

- Ex1.3.1 The assessment builds upon the findings of **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]** and addresses three key areas:
- Tourist and Visitor Attractions - The ES chapter reported no significant direct impacts on tourist attractions within or beyond 500 m of the Suffolk Onshore Scheme. There are no anticipated land take or access severance effects, and cumulative assessments with other Nationally Significant Infrastructure Projects (NSIPs) (for example East Anglia ONE North and TWO, LionLink, and Sizewell C) also concluded no significant inter-project effects.
 - Visitor and Tourist Accommodation Capacity - Analysis of accommodation within a 60-minute drive time shows sufficient capacity to absorb the construction workforce without displacing tourists. During the construction of the Suffolk Onshore Scheme, even under peak demand scenarios in July 2028, a minimum of 17.7% spare capacity remains. Cumulative assessments confirm that 68% of accommodation capacity would still be available during the most constrained period.

- Visitor Perception - While visitor perception was not directly assessed in **Application Document 6.2.2.10 Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]**, this Technical Note reviews methodologies and findings from comparable NSIPs including Sizewell C, East Anglia ONE North, and Hinkley Point C. Evidence suggests that although concerns are often raised, they rarely translate into measurable reductions in visitor numbers or tourism-related employment. Monitoring reports from Hinkley Point C show continued growth in the local tourism sector during construction of that project.

Ex1.4 Conclusions and Implications

- Ex1.4.1 The assessment concludes that the Proposed Project is unlikely to result in significant adverse effects on visitors or tourism. Strategic planning policies have been considered, and the methodology aligns with best practice from other NSIPs. While visitor perception concerns are acknowledged, they are not supported by robust empirical evidence. As noted in EN-1 (paragraph 5.3.10), limited weight may be given to unsupported socio-economic assertions, particularly in light of the national need for energy infrastructure. The evidence base strongly supports the conclusion that the Proposed Project will not materially harm Suffolk's visitor economy.

1. Introduction

- 1.1.1 This Technical Note has been produced to provide additional justification for the methodology and assessment conclusions presented within the Sea Link Socio-economic, Recreation and Tourism chapter in relation to visitors and tourism. It has been produced to respond to concerns raised by stakeholders in Suffolk regarding potential adverse impacts of the Proposed Project on future visitor numbers, spending and the overall tourist perception of the Suffolk & Essex Coast & Heaths National Landscape.
- 1.1.2 **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]** reported the assessment of potential effects on receptors typically used by tourists and visitors. The assessment concluded that the Proposed Project would not result in any significant effects on visitors and tourism, either individually or cumulatively with other projects.
- 1.1.3 Building upon the assessment reported in **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]**, the Technical Note addresses three areas of assessment:
- impacts on tourism and visitor attractions;
 - impacts on tourist accommodation; and
 - impacts on visitor perception.
- 1.1.4 It should be noted that whilst impacts on tourist attractions and accommodation capacity are assessed as part of **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]**, the third area – visitor perception of impacts on an area – is not included as part of the assessment. This Technical Note reviews approaches to visitor and tourism impact assessment used in other NSIPs, both within the Study Area and beyond, to provide further context and clarity regarding the likely effects of the Proposed Project.
- 1.1.5 The Technical Note is structured in three parts:
- Section 2 - revisits the regulatory and planning policy context in relation to visitors and tourism.
 - Section 3 – comprises of two parts. Firstly, it describes the potential impacts on tourism and visitors resulting from the Suffolk Onshore Scheme. This includes a summary of the findings set out in **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]** and **Application Document 6.2.2.13 Part 2 Suffolk Chapter 13 Inter-Project Cumulative Effects [APP-060]**. Secondly, it reviews assessment outcomes for comparable NSIPs.
 - Section 4 - draws together the key findings from this analysis and considers these findings in the context of the assessment of visitors and tourism undertaken for the Proposed Project.
- 1.1.6 This Technical Note has been prepared with the assistance of Artificial Intelligence (AI). AI, in this instance ChatGPT, was used in June 2025 and November 2025 to help with

summarising the findings presented within **Application Document 6.2.2.10 Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]** and consolidating, editing and improving the clarity of the content presented within this Technical Note. The Applicant's use of AI has been limited to supporting the editing process, and therefore has not replaced any technical assessment material or the use of professional judgement. Furthermore, in line with the Planning Inspectorate's guidance, the Applicant's use of AI has been lawful and the Applicant takes responsibility for the factual accuracy of the content and conclusions within this Technical Note.

2. Regulatory and Planning Policy Context Review

- 2.1.1 A review of relevant policy and strategies at the local, regional and national levels has already been undertaken and documented in **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]**. There are several key strategic tourism objectives which could lead to potential planning constraints and should be considered to ensure compliance with relevant policy and to inform the overall planning balance.
- 2.1.2 The Overarching National Policy Statement for Energy (EN-1) (Department for Energy Security & Net Zero, 2023) sets out national policy for energy related NSIPs such as the Proposed Project. It sets out that the applicant should complete a comprehensive assessment of socio-economic impacts, including potential effects on tourism. It emphasises the need to consider job creation, training opportunities, and enhancement of local services and infrastructure, including those used by visitors. Additionally, it highlights the importance of considering cumulative impacts and interrelated effects from other disciplines such as landscape and visual or traffic and transport. These elements are central to evaluating tourism impacts and ensuring that potential disruptions are minimised and effectively managed.
- 2.1.3 The consultation draft NPS EN-1 published in 2025 does not introduce any new or materially different policy requirements in relation to socio-economics, recreation and tourism beyond those already set out in the 2023 version. Accordingly, the assessment approach adopted for the Proposed Project remains consistent with both the current designated EN-1 and consultation draft. The NPPF (Ministry of Housing, Communities & Local Government, 2025) sets out the government's planning policies for England and how these should be applied. Although not the primary decision-making policy for NSIPs, it is still considered to be important and relevant. The NPPF promotes balanced economic, social, and environmental development. Paragraph 200 states that new developments must be effectively integrated with existing businesses and community facilities, including those related to tourism and recreation such as pubs, music venues, and sports clubs. Where significant adverse effects are anticipated, appropriate mitigation must be implemented prior to the completion of the development. This policy underscores the need to proactively manage any potential negative effects on the visitor economy.
- 2.1.4 The Suffolk Coastal Local Plan 2020 (East Suffolk Council, 2020) recognises tourism as a key component of the area's economy through Policy SCLP 6.1: Tourism. The policy aims to manage tourism growth in a way that protects the natural and cultural features attracting visitors, while also supporting community infrastructure. Any proposed development must therefore demonstrate that it will not detract from the area's visitor appeal or adversely affect local facilities.
- 2.1.5 The East Suffolk Council's East Suffolk Visitor Economy Strategy 2022-2027 (East Suffolk Council, 2022) stresses the importance of building a sustainable, inclusive, and resilient visitor economy. It acknowledges the emerging challenges posed by the expanding clean energy sector and the potential for conflict with tourism objectives. East Suffolk Council has therefore prioritised early-stage planning and mitigation to

address and minimise any disruption to tourism flows, local perceptions, and business performance in the visitor economy sector. East Suffolk's Cultural Strategy 2023-2028 (East Suffolk Council, 2023) aligns with the Council's broader tourism aims by promoting a thriving cultural economy, fostering creative career opportunities, and encouraging community participation. The enhancement of cultural assets and opportunities contributes directly to the attractiveness of East Suffolk as a tourist destination and thus supports economic resilience through cultural tourism.

- 2.1.6 Saxmundham Neighbourhood Plan 2022-2036 (East Suffolk Council, 2023) has a number of relevant policies which support tourism development by encouraging business growth and protecting outdoor recreational infrastructure, particularly SAX2 (Expansion of Existing Businesses), SAX3 (New Businesses), and SAX6 (Public Rights of Way).
- 2.1.7 These strategic tourism objectives and associated policy constraints collectively stress the importance of preserving and enhancing East Suffolk's visitor economy in the context of large-scale development proposals. They provide a robust framework for identifying potential socio-economic effects on visitors and tourism and guiding the implementation of effective mitigation strategies. These are important considerations in ensuring alignment with established policy priorities and local development aspirations.

3. Assessment of Visitors and Tourism

3.1 Introduction

- 3.1.1 This section of the Technical Note addresses the potential effects of the Proposed Project on visitors and tourism. It builds upon the assessment presented in **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10: Socio-Economics, Recreation and Tourism [REP1A-005]**, drawing together the relevant findings and providing additional context where appropriate.
- 3.1.2 The assessment of visitors and tourism within this Technical Note focuses on three key topic areas:
- impacts on tourism and visitor attractions (3.2);
 - impacts on tourist accommodation capacity (3.3); and
 - potential effects relating to visitor perception of the area (3.4).
- 3.1.3 Sections 3.2 and 3.3 present matters that are fully assessed within the ES. Specifically, Section 3.2 summarises the findings in relation to tourism and visitor attractions, including consideration of direct and cumulative effects with other NSIPs. Section 3.3 addresses visitor and tourist accommodation capacity, drawing on the ES assessment of construction workforce demand and accommodation supply, including cumulative effects.
- 3.1.4 It should be noted that while impacts on tourist attractions and accommodation capacity are assessed as part of **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]**, the potential effects associated with visitor perception were not assessed within the ES. This is because visitor perception effects are inherently difficult to quantify and also evidence from other similar schemes suggests they are not subject to significant effects.
- 3.1.5 Accordingly, Section 3.4 of this Technical Note does not present a new impact assessment, but instead provides a review of approaches and evidence from comparable NSIPs, both within the Study Area and nationally. This review is intended to provide additional context and reassurance regarding visitor perception effects, drawing on experience from other NSIP projects such as Sizewell C, East Anglia ONE North and Hinkley Point C.

3.2 Tourist and Visitor Attractions

- 3.2.1 **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]** reports the assessment of tourism assets within 500 m of the Suffolk Onshore Scheme Order Limits, in terms of any temporary or permanent land take impacts and severance of access. The study area of 500 m was determined based on experience from other NSIPs and Design Manual for Roads and Bridges (DMRB) LA 112: Population and human health guidance¹ (National Highways,

¹ Although developed for road and bridge projects, the DMRB presents mature assessment methodology often used where sector specific guidance does not exist.

2020), as this is the distance threshold beyond which it is considered that people are likely to be deterred from making trips to an extent that they would change their habits. Additionally, where deemed appropriate, receptors that lie outside of the study area have also been identified and assessed. As set out in the ES, there are no tourist and visitor attractions that would be affected by land take required for the Suffolk Onshore Scheme or to which access would be required. Additionally, **Application Document 6.2.2.7 Part 2 Suffolk Chapter 7 Traffic and Transport [APP-054]** concluded there are no significant effects in terms of severance on the roads to be used as construction routes during construction. Therefore, the socio-economic assessment concluded there would be no severance effects between residents or visitors and tourism assets due to the construction of the Suffolk Onshore Scheme. No additional impacts have been identified during the operation and maintenance phase.

- 3.2.2 To complete the cumulative inter-project assessment of socio-economics, recreation and tourism effects, the Suffolk Onshore Scheme is assessed separately with the other cumulative developments and collectively with all cumulative developments to consider total inter-project cumulative effects. As set out in **Application Document 6.2.2.13 Part 2 Suffolk Chapter 13 Suffolk Onshore Scheme Inter-Project Cumulative Effects [APP-060]**, a few schemes (South Saxmundham Garden Neighbourhood, East Anglia One and Two Offshore and LionLink Offshore interconnector) share receptors with the Proposed Project. These shared receptors, located within 500 m of each scheme's boundary, include residential properties, business premises, visitor attractions, community facilities, open space and development land. In all cases, no significant inter-project cumulative effects on visitor and tourist attraction receptors have been identified.

3.3 Tourist Accommodation Impacts

- 3.3.1 **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]** presents an assessment to evaluate whether existing visitor and tourism accommodation within a 60-minute drive of the Suffolk Onshore Scheme could meet demand from the peak construction workforce. The study area of 60-minutes has been determined in line with Research by the Chartered Institute of Personnel and Development (CIPD) (Chartered Institute of Personnel Development, 2017), which found that 90% of national employees commuted for 60 minutes or less each way. At peak, the Applicant estimates that the Suffolk Onshore Scheme would require a construction workforce of 327 full-time equivalent (FTE) workers, which is anticipated to occur in 2028 but lasts for one day (peak year (2028) has an average of 164 FTE workers). However, an average of 86 FTEs is estimated to be required onsite per annum over the entire construction period. It is estimated that 30% of the construction workforce could be sourced from within the 60-minute drive time area and therefore will not require accommodation. The 30% leakage rate would be subject to labour availability and take-up at the time of construction; however, it is considered to be a reasonable assumption on which to base this assessment, based on professional experience and benchmarking against other comparable energy projects. The 60-minute drive time area is assessed as having medium sensitivity in a worst-case scenario, and takes account of existing visitor and tourist demand for hotels, bed & breakfasts and inns during peak demand in July, based on seasonal occupancy rates from Visit England 2023.
- 3.3.2 The assessment shows that the construction workforce could be accommodated within the local accommodation sector, comprising hotels, bed and breakfasts, inns and

private rented accommodation². If all 86 average FTE workers required accommodation, an estimated 1,583 rooms would remain available across the private rented and tourist accommodation sectors. This represents a spare capacity of 20.9% from the identified inventory stock. If all 229 non-local peak FTE workers required accommodation, 1,440 rooms would remain available, representing 19.0% spare capacity. Even in the worst-case scenario where the total peak construction workforce (327 FTE) required accommodation, there would still be approximately 1,342 rooms available, equating to 17.7% spare capacity.

- 3.3.3 Therefore, even under a worst-case scenario whereby the peak construction workforce all require visitor and tourist accommodation during peak occupancy in July, the existing local tourist accommodation would be able to accommodate employees working on construction of the Suffolk Onshore Scheme without any significant adverse effects on the sector. This analysis has also not accounted for private rental accommodation beyond East Suffolk, which could further reduce any potential pressure.
- 3.3.4 **Application Document 6.2.2.13 Part 2 Suffolk Chapter 13 Suffolk Onshore Scheme Inter-Project Cumulative Effects [APP-060]** assesses the Sizewell C, East Anglia ONE North and TWO Offshore Windfarms, Norwich to Tilbury transmission reinforcement, and LionLink Offshore Interconnector individually alongside the Proposed Project, followed by an assessment of all cumulative schemes together with the Proposed Project. The same 60-minute drive time and occupancy rates as used in **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]** have been used to determine the number of rooms available in the tourist accommodation sector. However, for the cumulative assessment, accommodation capacity within the private rented homes sector has also been considered to take account of the range of available accommodation for construction workers. Office of National Statistics (ONS) Census 2021 Data for dwelling stock by tenure estimated that there were 126,542 private rented properties in the local authorities falling primarily within the Sea Link 60-minute drive time, namely East Suffolk, South Norfolk, Ipswich, Great Yarmouth, Broadland, Mid Suffolk, Babergh, Colchester, Tendring, Breckland and Norwich. By using this figure and taking account of availability of private rental accommodation, there were an estimated 9,491 private rented properties that could be available to construction workers. Therefore, the total inventory stock of tourist accommodation and private rental accommodation, before accounting for seasonal demand is 16,529.
- 3.3.5 For the purposes of this assessment, the construction programme and peak construction workforce for each cumulative scheme have been gathered and assessed in combination with the Proposed Project's peak construction workforce over the construction period (2026-2032).
- 3.3.6 Adjustments for leakage and embedded mitigation have been applied to this assessment. For the Proposed Project, it is estimated that 30% of construction staff could be sourced from within the 60-minute drive time Study Area. As adopted in their respective DCO applications, a 20% leakage adjustment has been applied to the peak construction workforce for East Anglia ONE North and East Anglia TWO. As LionLink and Norwich to Tilbury were awaiting a developer application submission to the Planning Inspectorate a worst-case scenario has been adopted, assuming that all workers will travel from outside the 60-minute drive time area. With regards to Sizewell

² For the socio-economic assessment, private rental accommodation was captured at East Suffolk level. For the cumulative assessment, private rental accommodation was captured at the 60 minute drive time area to align with the accommodation types.

C the Project Accommodation Strategy will provide temporary accommodation in the form of a Temporary Accommodation Campus and Temporary Caravan Park. It was estimated that 1,200 construction workers on the Sizewell project will require tourist accommodation and a maximum of 800 workers will require accommodation in the private rental sector.

- 3.3.7 Accounting for the above, July 2028 is assumed to be the month of greatest constraint where all schemes' construction periods coincide, and tourist accommodation is at peak occupancy. It should be noted that all cumulative schemes currently only coincide in 2028. In July 2028, there is anticipated to be a total peak of 3,415 construction workers requiring accommodation and, after accounting for seasonal demand, a total inventory stock of 10,617 rooms available within tourist accommodation and private rental accommodation within the 60 minute drive time area. This results in an accommodation capacity availability of 68%. Therefore, there is unlikely to be a significant cumulative effect on local accommodation capacity during the period of greatest constraint.

3.4 Visitor Perception Impacts

- 3.4.1 This section of the Technical Note considers findings from other NSIPs that assessed perceived visitor impacts, including how developments may impact visitor perception of an area and/or the visitor economy. In preparing this section, a desk-based review has been undertaken of other comparable NSIPs to look at the approaches taken to assessing socio-economic impacts in relation to visitors and tourism. This includes a review of the methodology, realised impacts, and Planning Inspectorate recommendations and decisions. The following NSIPs were considered:

- The Sizewell C Project;
- Bramford to Twinstead Reinforcement; and
- East Anglia ONE North Offshore Windfarm.

- 3.4.2 Additionally, the Sizewell C ES reviewed the monitored impacts on visitors and tourism of similar energy projects during construction, which this paper details and expands upon. These projects are:

- Sizewell B; and
- Hinkley Point C.

Methodology and Assessment of Effects

- 3.4.3 Sizewell C adopted different approaches to assessing impacts on visitors and tourism by use of a tourism survey, completing an assessment of accommodation effects and reviewing the realised impacts from comparable projects – Hinkley Point C and Sizewell B. The surveys were conducted online with a sample of past and potential future visitors to the Suffolk Coast (i.e. those who said they had visited this part of the Suffolk Coast in the past 12 months or were likely to visit within the next two years) and sought to understand how construction of the Proposed Project might influence their behaviour. The headline from the survey was that the majority (53% of respondents) said that the construction of Sizewell C would not make a difference to how often they would visit, or they didn't know how it would affect them. 8% of respondents said they would be likely to visit the area more often. Overall, the survey results concluded that in some locations, times, and for some visitors, there was a risk of minor to moderate adverse effects arising from factors that contribute to tourist visitor sensitivity, such as traffic, that

have the potential to be significant at the local level without mitigation in the early years of construction.

- 3.4.4 The assessment of accommodation requirements for construction workers concluded that once embedded mitigation had been accounted for, there would be capacity in tourist accommodation to accommodate these workers and therefore no significant effects were anticipated.
- 3.4.5 The Sizewell C team reviewed the Hinkley Point C application, which used face-to-face surveys with tourists to gauge awareness of the development and potential impacts on future visitor behaviour. Visitors were presented with descriptions of the project's effects and asked whether these would influence their plans. Approximately 10% of respondents indicated they would alter their plans and avoid visiting the local area accordingly.
- 3.4.6 Overall, the Sizewell C team concluded that there is potential for localised effects generated from the specific characteristics of the Suffolk Coast that attract visitors; however, they also concluded that there is limited empirical evidence to suggest any quantifiable reduction in visitor numbers, expenditure, or business viability associated with Sizewell C.
- 3.4.7 The Bramford to Twinstead Reinforcement project scoped out the socio-economics topic from the ES, however they did produce a detailed socio-economics and tourism report to accompany the DCO application. This report assessed the impact of the project on the tourism economy, visitor attractions, and accommodation availability. The report sets out that project design and routeing were developed to avoid direct effects on visitor attractions. Potential temporary amenity effects during construction were acknowledged, but the application of good practice measures detailed in the Code of Construction Practice was anticipated to reduce these impacts to a non-significant level. An accommodation capacity assessment found sufficient capacity in nearby urban settlements to accommodate construction workers, minimising pressure on local tourist accommodation. This approach highlights proactive mitigation through project design and operational planning but relied more on professional judgment and secondary data than on primary visitor research.
- 3.4.8 The East Anglia ONE North Offshore Windfarm socio-economics assessment considered impacts on visitors and tourism through an assessment of tourism and hospitality sector enhancement, tourism and recreation disturbance and long-term tourism impacts. The assessment of tourism and hospitality sector enhancement considered impacts on the tourist accommodation sector. It was anticipated that non-residential workers would stay overnight in local accommodation and their expenditure may lead to increased demand for staff in the tourism sector but could also reduce availability of rooms for tourists visiting the area.
- 3.4.9 In terms of increasing expenditure and employment, the assessment draws upon the Destination Research study of the Economic Impact of Tourism to Suffolk Coast & Heaths AONB that shows people spend around £62 per night in the local economy (excluding accommodation) when they stay in the Suffolk Coastal District (Destination Research, 2017). It also notes that for every £60,000 spent in the area one FTE job is created. Based on this assumption, the assessment concluded that 7 FTE would be created over the construction period. In terms of accommodation capacity, as a worst-case scenario, the assessment assumed that 80% of the peak workforce would require rooms in the tourist accommodation sector at a time when businesses only have 20% availability. Under this scenario, East Anglia ONE determined that 47% of the 20% of remaining available rooms would be used by project workers, and as a result would not

be likely to displace tourists seeking room accommodation. Although the change in employment is relatively small (7 FTEs), the increased demand for accommodation during the off-peak season could have a large benefit for local businesses. It is highly likely for non-residential workers to stay overnight and evidence from local tourism studies show a clear link between expenditure and employment. Additionally, peak demand during the low or high season would not displace tourists and would provide additional income to local businesses. Therefore, the assessment concluded that this would have a major beneficial, and therefore significant, impact on local accommodation businesses.

- 3.4.10 To assess tourism and recreation disturbance, East Anglia ONE considered impacts on PRow and areas of common land as a result of direct interaction with the Proposed Project, concluding only negligible impacts on these receptors once control and mitigation measures have been accounted for. Additionally, East Anglia ONE assessed impacts on tourist perception by analysing over 12,000 TripAdvisor reviews mentioning offshore wind farms to assess public sentiment. The analysis revealed that a very small proportion (0.24%) of visitors expressed negative opinions about wind farms visible from the coast, indicating negligible impact on visitor numbers or experience quality. To support the review analysis, East Anglia ONE also included a literature review as part of the methodology which included the National Grid (2014) Study into the Effect of National Grid Major Infrastructure Projects on Socio-economic Factors research, which examined visitor and resident attitudes toward electrical infrastructure. The study set out that although people had negative perceptions around electrical infrastructure and the surrounding landscape, it did not change their behaviour, likelihood to visit, or levels of expenditure. As a result, East Anglia ONE concluded a negligible (not significant) effect on tourism and recreation disturbance.
- 3.4.11 Once operational, the assessment acknowledges the potential for long-term changes to the visual, landscape, and seascape character of the area, which may negatively influence visitor perceptions and potentially reduce tourist numbers. The assessment draws upon the findings from the Landscape and Visual Impact Chapter, the Seascape, Landscape and Visual Amenity Chapter, and existing research on public attitudes towards offshore wind developments. It is identified that there is potential for visitors to have a negative perception of the residual significant landscape and visual impacts from a limited number of viewpoints. However, survey data for local research suggests that even where negative perceptions exist, these are unlikely to result in changes to visitor or recreational behaviour. As a result, the overall impact on the tourism industry within the Suffolk Coastal District and Suffolk County was considered to be negligible and not significant

PINs Recommendation and Decision

- 3.4.12 The Secretary of State (SoS) granted Sizewell C development consent in July 2022, alongside additional recommendations. The recommendation report noted that the ExA accepted that during construction there would be some impact on visitors and tourism in the local area due to the construction activity and considered that the managed and targeted Tourism Fund secured through the Section 106 agreement would be an effective mitigation approach for any impacts that do arise for local tourism. This fund will be used to deliver initiatives such as supporting the development of a tourism strategy, marketing and promotional activities for the Suffolk coast, and supporting existing tourist information centres and local projects. Once Sizewell C is operational, tourism effects were considered to be neutral and therefore the SoS considered that

little weight should be ascribed to matters relating to visitor and tourism effects against the making of the Order.

- 3.4.13 The ExA considered that the Sizewell C application had adequately assessed the likely significant effects created by the need to accommodate the workforce during construction. EDF proposed to provide an accommodation campus as well as a Housing Fund to provide support for both the private housing and tourist market supply. The ExA concluded that there were no matters relating to the accommodation effects which would weigh for or against the making of the Order.
- 3.4.14 It appears that ESC and SCC raised similar concerns regarding visitor perception in the Sizewell C Examination as they are now raising in relation to Sea Link. However, neither the ExA nor the SoS appeared to place significant weight on these concerns in reaching their conclusions.
- 3.4.15 The Bramford to Twinstead Reinforcement project was granted development consent in September 2024. In the recommendation report, the ExA noted that the Applicant scoped out socio-economics, a decision with which the Planning Inspectorate agreed. Nevertheless, in response to caveats in the Scoping Opinion, the Applicant included further socio-economic information and updated the baseline data in some areas and submitted this as part of the application in a Socio Economics and Tourism Report, confirming that the development was unlikely to have significant socio-economics and tourism effects. Overall, no recommendations were made in relation to matters concerning visitors and tourism.
- 3.4.16 The SoS granted consent for East Anglia ONE North Offshore Windfarm in March 2022. In its recommendation report, following assessment of the evidence submitted during the Examination, the ExA concluded that the construction of the proposed development would cause harm to the local economy, including to tourism, particularly around the proposed substation site, cable route, and landfall area. However, these negative effects were considered likely to be significantly reduced during operation and the socio-economic benefits of the proposed development were considered to outweigh the adverse impacts, particularly in the long term. Overall, despite concerns raised by the Local Planning Authorities (LPAs). As regarding cumulative impacts on tourism and local communities, and the ExA's recognition of likely adverse effects, the scheme was consented suggesting that these issues were afforded limited consideration in informing the decision.

Monitoring of Impacts

- 3.4.17 It is currently premature to ascertain the operational implications of Sizewell C, Bramford to Twinstead and East Anglia ONE North on visitors and tourism. However, the realised impacts for the construction and operation of Hinkley Point C and Sizewell B can be evaluated.
- 3.4.18 Hinkley Point C was granted development consent in March 2013. Since, EDF Energy and the Hinkley Point C Tourism Action Partnership (including local authorities and other tourist-sector stakeholders in the south-west) have been monitoring the effects of Hinkley Point C's construction on tourism activity. As set out in the Sizewell C ES, the pre-peak construction Socio-economic Advisory Group Report (2019) details that the anticipated negative effects identified in the ES chapter had not materialised at the time of writing, with local tourism business confidence remaining high aided by mitigation measures. The report further sets out that according to ONS Business Register and Employment Survey data, since development consent was granted tourist sector

employment in Somerset has grown by 32% in Somerset and 20% in the districts closest to the Hinkley Point C site. Since the Sizewell C DCO submission, another Socio-economic Advisory Group Report has been published (2024). This report considers the peak construction impacts of Hinkley Point C, corroborating the findings of the previous report. Tourist perception data surveying the impact of Hinkley Point C on Somerset tourism indicated that over 90% of tourists are not affected by construction activity. Together these two monitoring reports conclude that there is little empirical evidence the construction of the project supports direct effects on the tourism economy.

- 3.4.19 Sizewell B was granted planning consent in the 1980s, with construction starting in 1987 and has been fully operational since 1995. As identified by the Sizewell C ES Chapter 9 Socio-economics, there is similar evidence of trends during the construction of Sizewell B and as a result no empirical evidence of an impact on the tourist economy arising from construction activities. There was only a marginal change in employment in the tourism economy relative to the total number of jobs in the local area, and that fluctuations are in line with average annual variations seen throughout the time series. In real terms the number of jobs in Suffolk Coastal increased significantly over this time, as did tourism-related jobs. Between 1987 and 1995, jobs in these sectors increased by around a third.

Limitations

- 3.4.20 Overall, these case studies illustrate a range of methodological approaches in DCO applications, from empirical visitor surveys and literature reviews to project design mitigation and social media sentiment analysis. Each approach offers unique advantages: empirical surveys provide context-specific insights; literature and secondary data offer broad understanding; and proactive project design can effectively reduce potential impacts. However, limitations exist, such as reliance on self-reported behaviour, potential biases in online review data, and subjective assessments of significance without supporting data.
- 3.4.21 As illustrated by the realised impacts from Hinkley Point C, anticipated changes in visitor activity did not materialise to the extent predicted. This highlights the challenges associated with face-to-face surveys, which may not fully capture or accurately quantifying impacts on the tourist economy, particularly when respondents are asked to predict how they might respond to hypothetical scenarios.
- 3.4.22 Therefore, it is important to acknowledge the methodological limitations that may influence the robustness of assessments concerning impacts on visitors and tourism. As a result, caution is advised when relying on survey-based methods and hypothetical self-reported behaviour, to ensure that findings are considered alongside other evidence and support balanced conclusions.

Summary

- 3.4.23 In summary, the review of assessment methodologies, examination outcomes and realised impacts from comparable NSIPs provides supporting evidence for the socio-economic conclusions reached for the Proposed Project. The case studies demonstrate that, notwithstanding concerns often raised in relation to visitor perception and construction activity, such effects have not resulted in significant effects or indeed measurable reductions in visitor numbers or tourism expenditure.

- 3.4.24 The evidence reviewed in this section supports the conclusion that the Suffolk Onshore Scheme would not give rise to likely significant effects on visitors or tourism, either alone or in combination with other NSIPs.

4. Conclusions and Implications

- 4.1.1 This Technical Note provides additional clarity on visitor and tourism impacts associated with the Proposed Project, expanding on the Socio-Economics, Recreation and Tourism assessment submitted as part of the ES (**Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]**). It addresses relevant planning policy, assesses local and cumulative effects on attractions and accommodation, and draws comparisons with other NSIPs, including Sizewell C, Bramford to Twinstead, and East Anglia ONE North.
- 4.1.2 The paper reaffirms that strategic planning policies, such as the Overarching National Policy Statement for Energy (EN-1), NPPF, and East Suffolk Local Plan, require developments to safeguard the tourism economy and community facilities. The assessment found no visitor attractions within 500 m of the Suffolk Onshore Scheme that would experience land take or severance impacts. The accommodation assessment shows that even during peak construction, spare capacity in the visitor and tourism accommodation sector would remain, with a minimum of 17.7% availability in the worst case.
- 4.1.3 When inter-project cumulative effects are considered, although these schemes share a number of receptors, due to the size, nature and temporal scope of the relevant developments, there are unlikely to be any significant cumulative effects. Considering local accommodation capacity, even when each of the cumulative schemes' construction periods overlap, there remains 68% accommodation capacity across tourist and private rental sectors during the most constrained month and year.
- 4.1.4 Similar NSIPs, Sizewell C, Bramford to Twinstead, and East Anglia ONE North, have all concluded that their developments would result in no significant effects on visitor and tourism activity. Notably, these projects have adopted a comparable methodology to Sea Link in assessing impacts. For example, East Anglia ONE North considered effects on visitor attractions / recreational receptors, applying land take assessments to evaluate any loss of amenity or access. Assessments of tourist accommodation capacity were also carried out by each of the three comparable NSIPs to determine whether construction workforces could be absorbed without displacing tourists or placing strain on the visitor economy. These approaches informed the conclusions across all three projects that no significant tourism impacts would arise.
- 4.1.5 Visitor perception surveys undertaken for projects such as Sizewell C and Hinkley Point C indicate that, for most respondents, the construction of these developments is not expected to influence the frequency of their visits to the local area, although a minority indicated this would change their frequency of visits to the local area. However, monitoring reports from Hinkley Point C have shown that these concerns did not translate into measurable impacts on visitor numbers or tourism-related employment. In fact, confidence within the local tourism sector remained strong and continued to grow throughout the construction phase. While visitor surveys can provide insights, it is important to recognise their limitations, particularly their reliance on self-reported, hypothetical behaviour which may not accurately reflect actual outcomes. Therefore, such findings should be considered thoughtfully alongside other evidence when assessing potential visitor and tourism impacts.

In conclusion, the available evidence suggests that the Suffolk Onshore Scheme is unlikely to lead to significant adverse effects on visitors or tourism, as concluded within **Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]**. Local tourist attractions are not expected to be significantly impacted by land take or access constraints, and the temporary accommodation sector has sufficient capacity, even under the peak cumulative construction scenario. While concerns about potential disruption are occasionally raised by survey respondents, there is limited robust evidence to suggest that these perceptions result in material adverse effects on visitors and tourism. In this regard, paragraph 5.3.10 of the NPS EN-1, provides useful context, noting that: “*The Secretary of State may conclude that limited weight is to be given to assertions of socio-economic impacts that are not supported by evidence (particularly in view of the need for energy infrastructure as set out in this NPS).*” In light of this, the Socio-economic, Recreation and Tourism assessment presented within the ES (**Application Document 6.2.2.10 (B) Part 2 Suffolk Chapter 10 Socio-Economics, Recreation and Tourism [REP1A-005]**) is underpinned by a sound and consistent methodology, aligned with approaches used in other NSIPs DCO applications. The evidence base presented strongly supports the conclusion that the Proposed Project will not result in significant adverse impacts on visitors and tourism in Suffolk.

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