

## 13. Socio-Economics

### Executive Summary

The Socio-Economics chapter sets out the potential effects of construction and operation of the proposed development on the resident population both within PCC and nationally.

The Socio-Economics assessment was carried out with reference to IEMA (now Institute of Sustainability and Environmental Professionals (ISEP)) guidance on determining significance for human health in EIA, and includes a review of local and national planning policies of relevance to socio-economics.

Baseline conditions were established through desktop research and analysis of official statistics. The local socio-economic profile is consistent with a rural area, showing low population density, and older and less ethnically diverse population than national average. Local residents were found to have higher skill levels than national average, with more residents having degree-level qualifications and working in higher level occupations. Unemployment rates are low, and relatively few residents are claiming out of work benefits. Nevertheless, the local economy is highly dependent on tourism, with 30% of jobs being in accommodation and food services – by far the largest sector within the Pembrokeshire 003 MSOA.

Employment effects, tourism economy effects and social infrastructure effects were assessed for both the construction phase and the operational phase.

During the construction phase:

- 65 gross direct construction jobs (full-time equivalent (FTE) are expected to be created, rising to 90 FTE once indirect and induced jobs are taken into account (alongside allowances for leakage and displacement). In the context of the national construction industry, this effect was found to be not significant.
- Up to 100 temporary accommodation bedspace could be required for the duration of the construction project. This would require around 2.1% of existing bedspaces, which is not expected to have an adverse impact on availability of accommodation for tourist visitors and therefore is not significant.
- Very few, if any, temporary construction workers are expected to make use of existing local social infrastructure, however in the event that they do, there is sufficient capacity within existing provision to accommodate. This effect is also not significant.

During operation:

- 60 FTE staff members are required. All staff are expected to live locally, and the workforce is expected to comprise both existing local residents and new residents moving to the local area with their families to take up work at the completed development. Though beneficial, this effect in context of there being 49,000 total jobs in PCC, is not significant.
- Workers relocating from other parts of the country to take up work are expected to bring their families with them. Assuming this is the case for half of the 60 total jobs created, this could create demand for up to 90 additional general practitioner (GP) registrations and 30 school places (assuming each worker, on average, brings a spouse and one child). As noted above, there is sufficient capacity within existing local provision to accommodate this increase in local population, and therefore this is not a significant effect.



- The permanent operation is not expected to impact on the local tourism economy, as there is no evidence to suggest that the presence of the completed development will cause a drop in visitor numbers.

Based on the findings of this assessment, it is concluded that the proposed development is acceptable and not significant from a socio-economics perspective.



## 13.1. Introduction

- 13.1.1. This chapter assesses the potential significant socio-economic effects resulting from the proposed development. The approach to this assessment follows the Environmental Impact Assessment (EIA) Scoping Report (March 2023) submitted to Pembrokeshire County Council (PCC) and has been prepared in accordance with the EIA Scoping Opinion (received May 2023) for the proposed development from PCC, and further consultation, as described in Section 13.2, has also been incorporated.

## 13.2. Methodology

- 13.2.1. Socio-economic effects arising from development have potential to impact on human health at a population level – both on the subject site and within the wider community. Guidance from the Institute of Environmental Management and Assessment (IEMA<sup>313</sup>) cites the World Health Organisation (WHO) definition of health – which refers to health as being ‘a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity’<sup>314</sup>. On this basis, a wide range of socio-economic factors can influence the health of a given population.
- 13.2.2. The IEMA guidance goes on to identify a range of ‘wider determinants of health’ to be taken into consideration within EIA, which includes social factors (which includes access to housing, open space, healthcare, education and transport) and economic factors (such as access to employment and expenditure in the local economy). These factors and others form the basis of this assessment.

### Study Area

- 13.2.3. IEMA guidance recommends making assessments based on the ‘most relevant geographic population’<sup>315</sup>, and that this should focus on smaller areas where feasible.
- 13.2.4. The application site is located within the Solva ward of PCC, in the south-west of Wales, a country which forms part of the United Kingdom.
- 13.2.5. It is not normally possible to assume a single study area for the assessment of socio-economic effects, as different effects impact on sensitive receptors at different spatial scales (for example, construction supply chains tend to extend across a wide region, whilst school catchment areas tend to be much more localised). The following study areas have been assumed within the assessments set out in this chapter:
- **Construction employment – Study Area: United Kingdom:** Whilst construction contractors will normally endeavour to use local construction labour where possible (to create a positive local economic impact and to avoid the need for temporary accommodation), the rural nature of the site and the specialist nature of the proposed development means that it is unlikely that the proposed development’s labour requirements can be met in full locally. To reflect a reasonable worst-case scenario, the assessment has therefore assumed a UK-wide study area for construction employment.
  - **Construction temporary accommodation – Study Area: Pembrokeshire:** It is likely that the construction phase will create a demand for temporary accommodation within the local area, resulting from the anticipated necessity to use non-local labour. The

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<sup>313</sup> Now officially known as ISEP – the Institute of Sustainability and Environmental Professionals. As the relevant guidance has not been re-published under the new name, this chapter continues to refer to ‘IEMA guidance’ to reflect the name of the organisation which published it.

<sup>314</sup> IEMA (2022) ‘Determining Significance for Human Health in EIA’, p.5

<sup>315</sup> IEMA (2022) ‘Determining Significance for Human Health in EIA’, p.10

Pembrokeshire area (defined as within the PCC boundary) has been assumed as the study area for this assessment. This area has a significant stock of temporary accommodation due to the strong local tourism sector, and therefore it has been assumed that all temporary accommodation requirements will be able to be met within this area.

- Operational employment – Study Area: Pembrokeshire:** Once operational, the site will be staffed by civilian staff. It has been assumed that all staff will live within in the local community, and not within existing on-base residential accommodation. On the basis that the PCC covers a large area, with the County boundary at least 45 minutes’ drive from the site, it has been assumed that the majority of civilian staff will live within Pembrokeshire. The study area for assessing operational employment impacts is therefore defined as within the PCC boundary.
- Operational social infrastructure – Study Area: Pembrokeshire (within 30 minute drive):** Owing to the rural nature of the Site and the relatively small local workforce, the completed development may bring new residents to the local area (who would relocate from other areas to take up employment opportunities created), potentially increasing demand for social infrastructure such as schools and General Practice (GP) surgeries. The study area for such effects has been defined as the Pembrokeshire area, but with a focus on infrastructure located nearest to the site (defined as within a 30-minute drive of the site, incorporating the Middle Layer Super Output Areas (MSOAs) shown and labelled in Image 13.1 below). Social infrastructure beyond this area is unlikely to be significantly affected and has been scoped out of further consideration.

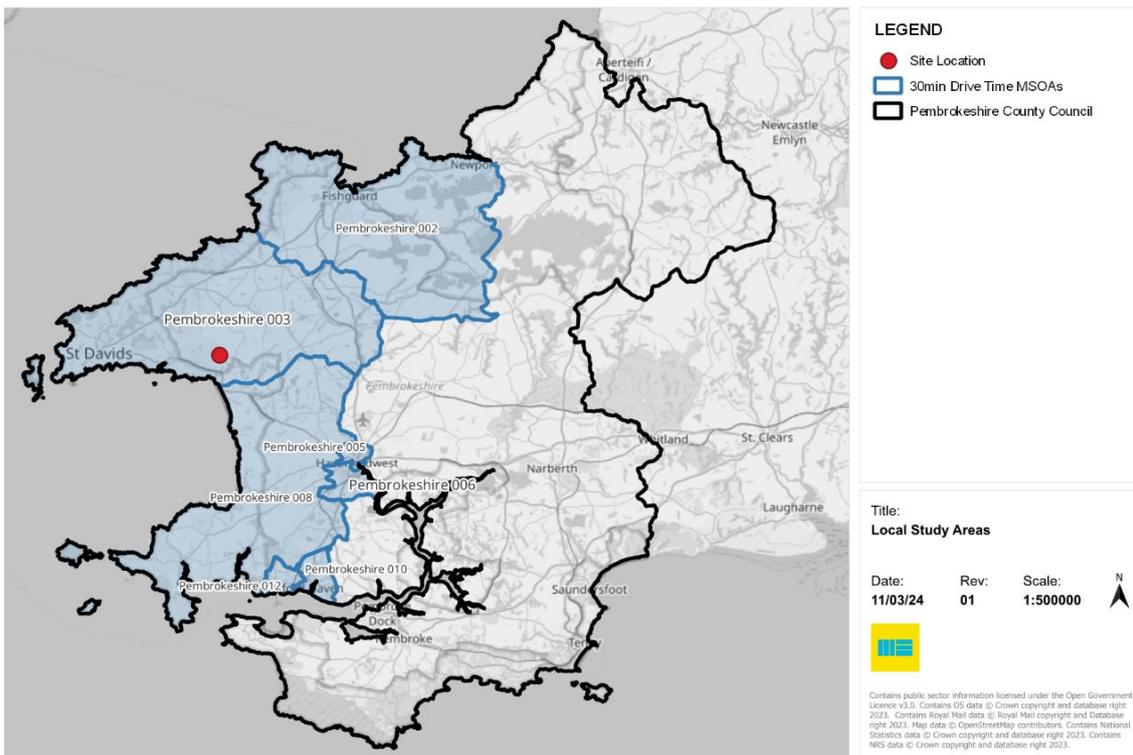


Image 13.1: MSOAs within approximately 30 mins drive of site.

## Baseline

### 13.2.6.

Baseline socio-economic conditions have been established for the study areas noted above through desktop research and analysis of published statistical data. Data sources analysed for this purpose are:

- Office for National Statistics (ONS), Census 2021;



- ONS, Business Register Employment Survey 2023;
- NHS Wales, General Practice Workforce and Population statistics, July 2024;
- Welsh Government, Pupil level Annual School Census, July 2024; and
- Visit Pembrokeshire, Pembrokeshire Bedstock Survey 2021, published February 2022.

13.2.7. Cawdor Barracks is a military base and currently occupied by 14<sup>th</sup> Signals Regiment. Regardless of the proposed development, the 14<sup>th</sup> Signals Regiment will vacate at the end of December 2028 as all funding to the military base will stop as of end of financial year 2029. When the proposed development commences, the site will be transferred to the Airforce. In the absence of the proposed development, Cawdor Barracks would remain with the Ministry of Defence, however there would be no associated military unit and the future of the site would be uncertain as new funding for the site would require approval. The infrastructure at Cawdor Barracks would remain and only essential legal maintenance of the site would be undertaken from the end of December 2028.

13.2.8. Nevertheless, for the purpose of this assessment, a baseline of current conditions has been assumed. This provides a reasonable worst-case scenario on the basis that new jobs created will have a smaller impact than in a scenario where the 14<sup>th</sup> Signals Regiment have already departed.

### Legislation, Policy, and Guidance

#### ***Planning Policy Wales (Edition 12)***

13.2.9. The primary objective of Planning Policy Wales (PPW) in relation to socio-economics is to ensure that the planning system contributes towards the delivery of 'sustainable development' and improves the social, economic, environmental and cultural well-being of Wales, as required by the Planning (Wales) Act 2015 and the Well-being of Future Generations (Wales) Act 2015.

13.2.10. PPW sets out a number of key planning principles, which include the following of relevance to socio-economics:

- Growing our economy in a sustainable manner;
- Making best use of resources;
- Facilitating accessible and healthy environments;
- Creating & sustaining communities; and
- Maximising environmental protection and limiting environmental impact.

13.2.11. The principle in relation to growing the Welsh economy sustainably demonstrates the planning system's role in enabling development which:

- Contributes to long term economic well-being;
- Makes the best use of existing infrastructure; and
- Plans for new supporting infrastructure and services.

13.2.12. The national sustainable placemaking outcomes (Figure 5 and Annex B of PPW) also include the objective of fostering economic activity.

13.2.13. Section 5.4 of PPW sets out the Welsh Government's aims in relation to economic development and states that growth in innovative, emerging technology and high value-added

sectors is strongly supported and that development plans should consider the role these sectors may play in terms of investment and job creation in their area.

- 13.2.14. In relation to the rural economy specifically, PPW states that planning authorities should adopt a positive approach to employment arising from innovative and technology-based sectors, including research and development, in addition to employment arising from the traditional agriculture, forestry and leisure sectors.

#### ***Future Wales – The National Plan 2040***

- 13.2.15. Future Wales – the National Plan 2040 was published in February 2021 and is the Welsh national development framework.
- 13.2.16. The future Wales outcomes are the ambitions which have been set within the plan to enable a prosperous Wales by 2040. Outcomes of relevance to socio-economics include a focus on:
- Creating vibrant rural places with access to homes, jobs and services;
  - Tackling health and socioeconomic inequality through sustainable growth; and
  - Creating places where prosperity, innovation and culture are promoted.
- 13.2.17. The policies set out within Future Wales also recognise that the lack of employment opportunity is cited a key reason behind rural depopulation, particularly in the younger workforce and can also contribute to deprivation and inequality.

#### ***Local Development Plan***

- 13.2.18. This chapter makes reference to the current Local Development Plan (LDP) and the planning statement for the proposed development considers emerging policies and therefore considers the LDP Review which is currently in development.
- 13.2.19. The LDP outlines a number of Strategic Policies (SPs) of relevance to the assessment of socio-economics of the proposed development.
- 13.2.20. SP9 (Welsh Language) states that “Development will be managed sensitively in areas where the Welsh language has a significant role in the local community. This may include phasing, signage and / or other appropriate mitigation measures.”
- 13.2.21. SP16 (The Countryside) states that “The essential requirements of people who live and work in the countryside will be met whilst protecting the landscape and natural and built environment of Pembrokeshire and adjoining areas. Development which minimises visual impact on the landscape and relates to one of the following will be promoted:
- Enterprises for which a countryside location is essential;
  - Opportunities for rural enterprise workers to be housed in suitable accommodation that supports their employment; and
  - The re-use of appropriate existing buildings.”
- 13.2.22. The Deposit 2 plan of the LDP update (2017-33) was submitted was submitted to the Welsh Government for independent examination on 17<sup>th</sup> July 2025.

#### **Consultation**

- 13.2.23. PCC was consulted on the scope of this assessment during the EIA scoping process. The EIA scoping response confirmed that the proposed scope (as set out at Paragraph 5.1.7 above) was appropriate. The EIA scoping process is discussed further in Chapter 2 (Methodology) of this ES.

- 13.2.24. Non-statutory public consultation has been undertaken by the wider project team – this has included in-person events where members of the public have been given the opportunity to comment on the proposed development. Job creation was raised as an important theme for members of the public during consultation. Statutory consultation will be carried out in accordance with national policy and best practice.
- 13.2.25. No specific consultation in relation to socio-economics has been necessary, as it has been possible to define a robust baseline position based on routinely published baseline information by bodies such as the ONS and NHS.

### Assessment Criteria

- 13.2.26. Topic-specific guidance for this assessment is provided within the IEMA guidance note ‘Determining Significance for Human Health in EIA’ (2022) – which is directly applicable to the assessment of socio-economic effects.

### **Receptor Sensitivity**

- 13.2.27. Table 13.1, taken from the IEMA (now ISEP) guidance, summarises the narrative criteria for each level of receptor sensitivity. The baseline conditions section of this chapter provides key context and justification for applying these criteria and determining individual receptor sensitivity or sensitivity of receptor groups. Baseline conditions summarised in Section 13.3 are used as evidence to set the level of receptor sensitivity in relation to each sub-assessment.

Table 13.1: Receptor Sensitivity Criteria

Category/Level	Indicative criteria
High	High levels of deprivation (including pockets of deprivation); reliance on resources shared (between the population and the proposed development); existing wide inequalities between the most and least healthy; a community whose outlook is predominantly anxiety or concern; people who are prevented from undertaking daily activities; dependants; people with very poor health status; and/or people with a very low capacity to adapt
Medium	Moderate levels of deprivation; few alternatives to shared resources; existing widening inequalities between the most and least healthy; a community whose outlook is predominantly uncertainty with some concern; people who are highly limited from undertaking daily activities; people providing or requiring a lot of care; people with poor health status; and/or people with a limited capacity to adapt
Low	Low levels of deprivation; many alternatives to shared resources; existing narrowing inequalities between the most and least healthy; a community whose outlook is predominantly ambivalence with some concern; people who are slightly limited from undertaking daily activities; people providing or requiring some care; people with fair health status; and/or people with a high capacity to adapt
Very Low	Very low levels of deprivation; no shared resources; existing narrow inequalities between the most and least healthy; a community whose outlook is predominantly support with some concern; people who are not limited from undertaking daily activities; people who are independent (not a carer or dependant); people with good health status; and/or people with a very high capacity to adapt

### **Impact Magnitude**

- 13.2.28. The IEMA guidance also provides narrative criteria for impact magnitude summarised in Table 13.2. Impact magnitude is determined using professional judgement, informed by quantitative analysis where possible.

Table 13.2: Impact Magnitude Criteria

Category/Level	Indicative criteria
High	High exposure or scale; long-term duration; continuous frequency; severity predominantly related to mortality or changes in morbidity (physical or mental health) for very severe illness/injury outcomes; majority of population affected; permanent change; substantial service quality implications
Medium	Low exposure or medium scale; medium-term duration; frequent events; severity predominantly related to moderate changes in morbidity or major change in quality-of-life; large minority of population affected; gradual reversal; small service quality implications
Low	Very low exposure or small scale; short-term duration; occasional events; severity predominantly related to minor change in morbidity or moderate change in quality-of-life; small minority of population affected; rapid reversal; slight service quality implications
Negligible	Negligible exposure or scale; very short-term duration; one-off frequency; severity predominantly relates to a minor change in quality-of-life; very few people affected; immediate reversal once activity complete; no service quality implication

### Significance Matrix

- 13.2.29. Finally, the IEMA (now ISEP) guidance provides a significance matrix, combining the magnitude of impact and sensitivity of the receptor in defining the overall significance of effect (Table 13.3). These significance criteria have been applied in this assessment to reflect best practice in this particular topic area.
- 13.2.30. Where a significance category is shown as borderline (e.g. major/moderate), professional judgement has been used (with justification noted in this chapter) to determine which of the two categories should apply. Those effects that are of major or moderate significance are considered to be significant effects for the purposes of the EIA Regulations, consistent with the IEMA (now ISEP) guidance.

Table 13.3: Significance Matrix

	High Sensitivity	Medium Sensitivity	Low Sensitivity	Very Low Sensitivity
<b>High Magnitude</b>	High	Major/moderate	Moderate/minor	Minor/negligible
<b>Medium Magnitude</b>	Major/moderate	Moderate	Minor	Minor/negligible
<b>Low Magnitude</b>	Moderate/minor	Minor	Minor	Negligible
<b>Negligible Magnitude</b>	Minor/negligible	Minor/negligible	Negligible	Negligible

### Assumptions & Limitations

- 13.2.31. Due to the non-standard nature of the proposed development, many of the sub-assessments presented in this chapter rely on information provided by the applicant and their technical advisors. This includes estimates of the number of jobs expected to be created and the composition of both the construction and operational workforces. Standard methods for independently estimating employment (such as using employment densities) are not applicable for a non-standard development such as this. The degree of uncertainty on number

of jobs expected influences the conclusions on the significance of effects and reflects a conservative outcome i.e. beneficial outcomes are reduced in significance and negative outcomes increased, which is likely to change as more detailed information is made available. This represents a reasonable worst case scenario and is consistent in approach with other chapters.

13.2.32. It has been assumed that all construction staff will not be local to the area and will therefore require temporary accommodation during construction.

13.2.33. For operational staff, it has been assumed (based on 2011 Census data) that 89%<sup>316</sup> will be Pembrokeshire residents – either current residents or people who move to Pembrokeshire to take up jobs at the completed development.

### 13.3. Baseline Conditions

#### Local Area Social Infrastructure

13.3.1. As the proposed development may result in new residents relocating to the local area from other parts of the UK to take up employment opportunities, it is possible that the capacity of social infrastructure serving existing communities could be adversely impacted.

13.3.2. Table 13.4 shows the nearest GP surgeries to the Site, according to NHS Wales, and based on distance from the nearest postcode to the Site (SA62 6AT). All these surgeries are located within a 30-minute drive of the Site. As shown below, all the nearby surgeries are currently accepting new patient registrations, indicating that excess capacity exists within these surgeries. Combined, these nearby surgeries have a total patient list size of 33,506.

Table 13.4: Healthcare Baseline

Surgery Name	Location	Distance from Site Postcode (miles)	Registered Patients	Accepting New Patients?
Solva Surgery	Solva	3.1	4,631	Yes
Broadhaven Surgery	Broad Haven	6.7	See Below (Branch Surgery of St. Thomas')	
St. Thomas' Surgery	Haverfordwest	8.7	13,310	Yes
Winch Lane Surgery	Haverfordwest	8.9	15,565	Yes

Source: NHS Wales

13.3.3. Table 13.5 below shows the nearest schools to the Site, based on distance from the site postcode. There is a range of school types in the local area, including nurseries, primary schools, and secondary schools. Provision for those aged 16-19 is available in Haverfordwest. The majority of local schools have significant excess capacity, though one school, Ysgol yr Eglwys yng Nghymru Penrhyn Dewi, was found to be operating above its capacity.

<sup>316</sup> Census 2011 commuter flow data indicates that 34,617 out of 38,752 workplace-based jobs in Pembrokeshire are filled by residents of Pembrokeshire. Census 2021 data and peoples commuting habits were affected by the Covid-19 pandemic at the time and is therefore not considered representative for these purposes.

Table 13.5 Education Baseline

School Name	Phase of Education	Location	Distance from Site Postcode (miles)	Pupils	Capacity	Surplus / Deficit
Roch Community School	Nursery and Primary	Roch	4.1	125	177	+52
Ysgol Gymunedol Croesgoch	Nursery and Primary	Croesgoch	5.3	101	119	+18
Ysgol yr Eglwys yng Nghymru Penrhyn Dewi	Nursery, Primary and Secondary	St. Davids	5.7	598	495	-103
Ysgol Caer Elen	Nursery, Primary and Secondary	Haverfordwest	11.7	871	1,020	+149
Haverfordwest High VC School	Secondary (up to Age 19)	Haverfordwest	11.0	1,699	1,750	+51

Source: PCC

### Resident Population and Workforce profile

- 13.3.4. The site is located within the 'Pembrokeshire 003' MSOA (as shown in Image 13.1). Baseline population data has been presented for this MSOA in Table 13.6 alongside Pembrokeshire and Wales to highlight characteristics in the immediate vicinity of the site, though for reasons noted at paragraph 13.2.5 the smallest study area assumed in the assessment is Pembrokeshire.
- 13.3.5. As shown in Table 13.6, population density within the MSOA is very low (35 people per km<sup>2</sup> - less than half the population density of PCC as a whole and less than a quarter of the density for Wales) – highlighting the rural nature of the area in which the site is located.

Table 13.6: Resident Population Profile

Indicator	Pembrokeshire 003 MSOA	Pembrokeshire	Wales
<b>Total Population (2021)</b>			
Population - 2021	7,236	123,360	3,107,493
Population Density	35 / km <sup>2</sup>	76 / km <sup>2</sup>	150 / km <sup>2</sup>
<b>Age Profile (2021)</b>			
Age 0-4	3.6%	4.5%	5.0%
Age 5-9	4.4%	5.5%	5.7%
Age 10-14	5.0%	5.8%	5.9%
Age 15-19	4.9%	5.1%	5.7%
Age 20-24	4.8%	4.6%	6.0%
Age 25-64	47.5%	48.3%	50.4%
Age 65-74	16.1%	14.2%	11.5%

Age 75+	13.5%	12.1%	9.8%
<b>Ethnicity (2021)</b>			
White	98.8%	97.6%	93.8%
Mixed / Multiple Ethnic Groups	0.8%	0.9%	0.6%
Asian / Asian British	0.1%	0.9%	2.9%
Black / African / Caribbean / Black British	0.1%	0.2%	0.9%
Other Ethnic Group	0.2%	0.3%	0.9%

Source: ONS, Census 2021

13.3.6. The MSOA has a greater proportion of its population between aged 65+ (29.6%) when compared to the local authority area (26.3%) and Wales as a whole (21.3%). It is also less diverse than the local authority area and Wales as a whole, with a higher percentage of white residents (98.8%) compared to the wider local authority area (97.6%) and Wales (93.8%) and correspondingly fewer residents from minority ethnic backgrounds.

13.3.7. Table 13.7 below summarises the characteristics of the workforce within the MSOA, Pembrokeshire and Wales.

Table 13.7: Workforce Profile

Indicator	Pembrokeshire 003 MSOA	Pembrokeshire	Wales
<b>Economic Activity and Unemployment (2021)</b>			
Economic Activity Rate	54.4%	51.4%	53.5%
Unemployment Rate	2.2%	3.7%	3.1%
<b>Age Profile (2021)</b>			
Claimant Count Oct 2021	115	2,815	81,350
Claimant Count Oct 2022	80	2,175	60,950
Claimant Count Oct 2023	80	2,055	60,270
% Change 2021-22	-30%	-22%	-25%
% Change 2022-23	0%	-5.5%	-1.1%
<b>Highest Level of Qualification (2021)</b>			
Level 4+ Qualifications	36.3%	31.2%	31.5%
Level 3 Qualifications	17.1%	17.0%	17.2%
Level 2 Qualifications	13.7%	15.1%	14.4%
Level 1 Qualifications	8.4%	9.1%	8.7%



Indicator	Pembrokeshire 003 MSOA	Pembrokeshire	Wales
Other Qualifications	1.9%	2.5%	2.7%
Apprenticeship	5.5%	6.2%	5.6%
No Qualifications	17.1%	18.8%	19.9%
<b>Occupation (2021)</b>			
Management / Professional / Technical	40.3%	36.2%	40.5%
Administrative / Skilled Trades	30.0%	25.0%	21.6%
Care / Leisure / Sales / Customer Service	15.7%	20.8%	19.6%
Operative / Elementary Occupations	14.0%	18.0%	18.4%

Source: ONS, Census 2021

- 13.3.8. According to the 2021 Census, the MSOA economic activity rate is 54.4%, which is higher than the average for Pembrokeshire (51.4%) and the Wales average (53.5%). It is important to note that economic activity rates were affected by the Covid-19 pandemic at the time of the Census, and data is presented to show relative differences between areas rather than to make a comment on actual economic activity levels.
- 13.3.9. Unemployment rates (defined as those out of work but actively seeking employment) for the MSOA (2.2%) are also lower than the Local Authority Area (3.7%) and Wales average (3.1%).
- 13.3.10. Data concerning claimant count shows that the MSOA saw a decrease in the number of claims between 2021 and 2022, and that there has been no change between 2022-2023. The initial decrease of 30% between 2021 and 2022 was a greater decrease than was seen across Pembrokeshire (-22%) and Wales (-25%).
- 13.3.11. The MSOA has a skilled population, with 36.3% of the population having qualifications at Level 4 or above compared to 31.2% in Pembrokeshire and 31.5% in Wales as a whole. The MSOA also has a smaller proportion of the population with no qualifications (17.1%) when compared to Pembrokeshire and Wales as a whole (18.8% and 19.9% respectively).
- 13.3.12. In terms of occupations, the most prevalent occupation is management / professional / technical, followed by administrative / skilled trades. The MSOA has a smaller proportion of the population whose occupation is operative / elementary occupations or care / leisure / sales / customer service compared to the wider Pembrokeshire and Wales areas.

### Economic Profile

- 13.3.13. Total employment within the MSOA in 2022 was 2,250 jobs, compared to a total of 49,000 jobs within Pembrokeshire and a total of 1,345,000 within Wales.
- 13.3.14. The MSOA's largest sector is accommodation and food services which constitutes 31% of jobs, a greater proportion than across Pembrokeshire and Wales (14% and 8% respectively). The second largest sector in the local area is retail.
- 13.3.15. Cawdor Barracks is understood to have around 400 current personnel. Military employment tends not to be accurately recorded in local employment statistics and appears not to be included in the total for the MSOA in this case. As such, total employment within the MSOA is estimated to be around 2,650.

13.3.16. Table 13.8 presents the local economic profile data as summarised above.

Table 13.8: Local Economic profile

Indicator	Pembrokeshire 003 MSOA	Pembrokeshire	Wales
<b>Largest Sectors within the Local Area by Number of Jobs (2022)</b>			
Accommodation & food services	700	7,000	112,000
Health	200	2,500	61,000
Retail	225	4,500	114,000
Education	150	4,000	116,000
Arts, entertainment, recreation & other service	150	2,500	61,000
Manufacturing	150	2,250	138,000
Construction	100	3,000	62,000
Business administration & support services	75	2,000	86,000
<b>Total Employment (2022)</b>			
Total Employment (2022)	2,250*	49,000	1,345,000

Source: ONS, BRES 2022 \*this appears to exclude military employment

### Pembrokeshire Temporary Accommodation

- 13.3.17. According to a 'Bedstock Survey'<sup>317</sup> undertaken by Beaufort Research in 2021<sup>318</sup> on behalf of Visit Pembrokeshire, the county had a total of 100,999 accommodation bedspaces, of which 4,838 were 'serviced' bedspaces (i.e. within hotels, bed & breakfasts and guesthouses), 26,970 were in self-catered accommodation, 67,533 at caravan / camping sites, and the remainder in other types of accommodation.
- 13.3.18. According to the survey, 59% of accommodation was located within the national park boundary (which includes towns such as St Davids) and 41% was located outside (including in towns such as Haverfordwest, Fishguard and Milford Haven). For serviced accommodation only, the share falling outside of the national park boundary increases to 48% - reflecting the propensity for these types of accommodation to be located in larger settlements such as those listed above.

<sup>317</sup> Beaufort Research / Visit Pembrokeshire (2022) Pembrokeshire Bedstock Survey 2021, available at: <https://eyz9ntboeer.exactdn.com/wp-content/uploads/Pembrokeshire-Wales-Bedstock-Survey-Report-25.04.22.pdf>

<sup>318</sup> Fieldwork for the bedstock survey was undertaken between October 2021 and January 2022. Though measures to control the spread of COVID-19 remained in place at this time, travel restrictions had been lifted and no further national lockdowns were implemented. As such, for the purpose of this assessment, the survey is considered to be reasonably representative of the composition of local visitor accommodation – insofar as most types of accommodation were open for business.



- 13.3.19. The Bedstock survey does not provide data on occupancy rates, however a national survey undertaken in 2022 by Visit Wales<sup>319</sup> identified that room occupancy in south-west Wales between August and December 2022 stood at 62% - a similar rate to south-east Wales, lower than north Wales (69%) but higher than mid-Wales (55%). On this basis, there would be around 38,000<sup>320</sup> total vacant bedspaces on an average night in Pembrokeshire. Assuming a peak high season occupancy rate of 90%, there would still be around 10,000 vacant bedspaces.

## 13.4. Design Interventions and Controls

- 13.4.1. No design interventions or controls specific to socio-economics have been included in the assessment; it is beyond the scope of the EIA process to influence decisions relating to employment and the economy.

## 13.5. Potential Significant Effects

### Sensitive Receptors

- 13.5.1. The following sensitive receptors have been identified. A level of sensitivity for each receptor has also been defined with reference to the findings of the baseline review and the IEMA (now ISEP) guidance summarised in Table 13.1.

- 13.5.2. The likely sensitive receptors in relation to socio-economics are as follows:

- The resident population living in Pembrokeshire (within a 30 minute drive of the site) – sensitive to changes in availability of social infrastructure. Receptor sensitivity is assessed as **medium**. Distances between facilities in rural areas tend to be much larger than in urban areas – meaning that if existing residents were less able to access their nearest facility due to increased competition for limited capacity introduced by the proposed development, the next nearest alternative is likely to be located relatively far away. However, as shown in tables 13.4 and 13.5, there appears to be a surplus of school and GP practice capacity in the local area, reducing receptor sensitivity.
- The working age population living in Pembrokeshire - sensitive to changes in available employment opportunities. Receptor sensitivity is assessed as **high**, on the basis that unemployment rates are slightly (but not significantly) higher than the average for Wales (and economic activity rates lower), and also the challenges faced in diversifying the rural economy.
- The construction sector and employees within the United Kingdom - sensitive to changes in available contract / temporary employment opportunities. Receptor sensitivity is assessed as **low**, owing to the strength of the sector nationally and the high demand for construction labour.
- The temporary accommodation sector (and wider tourism sector) and employees in Pembrokeshire – sensitive to changes in demand for temporary accommodation. Receptor sensitivity is assessed as **medium**, owing to the importance of the tourism sector for the Pembrokeshire economy, balanced by the healthy scale and diversity of the visitor accommodation sector within the area.

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<sup>319</sup> Government Social Research / Welsh Government / Visit Wales (2022), Wales Accommodation Occupancy Survey 2022, available at: <https://www.gov.wales/sites/default/files/statistics-and-research/2023-07/wales-accommodation-occupancy-survey-2022.pdf>

<sup>320</sup> 100,999 bedspaces multiplied by 38% vacancy = 38,380 vacant bedspaces

### Effects During Construction

13.5.3. The following socio-economic effects are likely to occur during the construction phase.

#### **Employment Effects**

13.5.4. The proposed development will create temporary demand for labour during construction. According to estimates provided by the proposed contractor, there will be an average of 75 Full Time Equivalent (FTE) construction staff on-site over the course of the 21-month construction period, with an average of 20 FTE staff on-site during the integration and testing phase<sup>321</sup> (an average of 65 FTE staff over the course of the full 24-month construction and integration/testing phase). At its peak (circa 10 months into the build), there will be around 100 staff on site, reducing to 20 staff in the final months as shown in Image 3.1 in Chapter 3 (Proposed Development).

13.5.5. Leakage has been assumed to be 10%. This is due to the adoption of a national study area for construction, and the vast majority of the direct construction workforce is expected to comprise UK residents. This, therefore, represents a reasonable worst case scenario.

13.5.6. Given the specialist nature of the proposed development, it is envisaged that any displacement will very low (i.e. that the proposed development is highly unlikely to prevent other projects from proceeding due to a lack of available workers) – a precautionary allowance of 10% has been applied, in accordance with the HCA Additionality Guide, 4th Edition.

13.5.7. Finally, the proposed development is likely to create additional employment indirectly through its wider supply chain and through 'induced spending', where workers employed directly and indirectly spend their wages in the UK economy (including locally). This has been captured through application of a composite multiplier of 1.7, owing to the strong supply chain linkages of the construction sector at a national level.

13.5.8. Table 13.9 below summarises the net employment impact arising from the proposed development.

Table 13.9: Additionality of Construction Employment

Step	Description	Value	Formula
A	Gross Direct Construction Jobs (FTE)	65	
B	Leakage (%)	10%	
C	National Direct Construction Jobs (FTE)	59	$A * (1 - B)$
D	Displacement (%)	10%	
E	New Regional Direct Construction Jobs (FTE)	53	$C * (1 - D)$
F	Composite Multiplier	1.7	
G	Indirect and Induced Regional Construction Jobs (FTE)	37	$E * (F - 1)$
H	Total National Construction Jobs (person years)	90	$E + G$

<sup>321</sup> For simplicity, testing within the construction phase, on the basis that jobs created in testing are temporary in the same way that construction jobs are. In practice, the testing phase is expected to extend into the first two months of operation, which would have a negligible impact on operational employment over the long term.

13.5.9. The proposed development is expected to create a net total of 90 FTE jobs temporarily for the duration of construction. In the context of the national construction sector, the magnitude of this impact is assessed as **negligible**.

13.5.10. With receptor sensitivity defined at paragraph 13.5.2 as low, the proposed development's effect on the construction sector and its workforce in the UK is assessed as **negligible beneficial, temporary in nature, and not significant**.

#### ***Tourism Economy Effects***

13.5.11. Based on the employment estimates summarised at paragraph 13.5.4, the proposed development will require up to 100 workers to be based on site at peak. Assuming on a worst-case basis that all of these workers will be non-local, this creates a peak requirement for up to 100 temporary accommodation bedspaces. On average across the build programme, up to 65 bedspaces per night could be required.

13.5.12. As set out at paragraph 13.3.17, there are an estimated 4,838 serviced bedspaces within Pembrokeshire. On this basis, the peak requirement for up to 100 bedspaces represents around 2.1% of total bedspaces. Furthermore, it is estimated that with average occupancy levels of around 62% across all accommodation types, there is normally likely to be surplus serviced accommodation capacity available.

13.5.13. On this basis the construction of the proposed development is assessed as having a low magnitude of impact on the availability of temporary accommodation (and therefore on the vitality of the tourism sector) at a Pembrokeshire level.

13.5.14. With receptor sensitivity defined at paragraph 13.5.2 as medium, the proposed development's effect on the tourism sector in Pembrokeshire (linked to the availability of temporary accommodation) is assessed as **minor adverse and not significant**.

#### ***Social Infrastructure Effects***

13.5.15. Finally, with some of the workforce likely to be brought in from outside the local area, the construction of the proposed development could result in a temporary increase in demand for local healthcare services.

13.5.16. The temporary workforce (reaching a peak of 100 staff) may need to access primary healthcare whilst working on site. Whilst the vast majority would be expected to use their usual healthcare facilities located close to their place of permanent residence, in some cases temporary workers may be eligible to register with a local GP surgery (most likely to be the case for those working on-site for an extended period of time, e.g. 6 months+).

13.5.17. As noted within the baseline conditions section, all of the nearest GP surgeries to the Site are currently accepting registrations of new patients, indicating that at least some surplus capacity exists. Furthermore, with a combined list size of 33,506, the potential addition of up to 100 further registrations (on a worst-case basis) reflects an increase in of c. 0.3% - a negligible magnitude of impact.

13.5.18. With receptor sensitivity defined at paragraph 13.5.2 as medium, the proposed development's effect on the resident population of Pembrokeshire (access to healthcare services) is assessed as **minor adverse, temporary in nature, and not significant**.

#### **Effects During Operation**

13.5.19. The following socio-economic effects are likely to occur during the operational phase.

**Employment Effects**

- 13.5.20. The proposed development will be in full-time, continuous operation, with operational staff working in shifts. The applicant has provided information on the estimated future staffing requirements for the proposed development to inform this assessment, and indicates that the following types and number of staff will likely be required:
- DARC Operating staff: 9 staff on-site per day, 7 days per week across two shifts per day (63 shifts per week – approximately 21 FTE staff assuming 3x 12-hr shifts per week);
  - DARC Day shift staff: 8 staff per day, 5 days per week across a single 8 hour shift (40 shifts per week – 8 FTE staff working 5x 8hr shifts per week); and
  - Security staff: Total crew of 31, working across three daily shifts (covering a total of 177 shifts per week on a typical week).
- 13.5.21. In total, 60 FTE staff members will likely be required. It is currently proposed that all staff will be civilian, who will be drawn from the local community (or who will relocate to the local area to take up employment at the completed development).
- 13.5.22. A 25% adjustment has been made for displacement (whereby vacancies are created but not filled elsewhere in PCC due to new jobs being created by the completed development), in line with guidance from the Homes and Communities Agency (HCA) Additionality Guide 4<sup>th</sup> Edition<sup>322</sup>.
- 13.5.23. During the operational phase, the proposed development will also have an effect in terms of local supply chains, and workers are likely to spend their wages in the local economy, generating further induced economic activity (and therefore supporting additional jobs). A composite multiplier of 1.25 has been applied to account for this, based on evidence from the What Works Centre for Local Economic Growth, which identifies that each public sector job created leads to 0.25 additional jobs being created elsewhere in the local economy<sup>323</sup>.
- 13.5.24. Table 13.10 below summarises the calculation of employment additionality relating to the operational phase of the proposed development.

Table 13.10: Additionality of Operational Employment

Step	Description	Value	Formula
A	Gross Direct Operational Jobs	60	
B	Leakage	11%	
C	Direct Local Operational Jobs	53	$A * (1 - B)$
D	Displacement	25%	
E	New Direct Local Operational Jobs	40	$C * (1 - D)$
F	Composite Multiplier	1.25	
G	Indirect and Induced Local Operational Jobs	10	$E * (F - 1)$

<sup>322</sup> Homes and Communities Agency (2014) 'Additionality Guide 4<sup>th</sup> Edition', p.33

<sup>323</sup> What Works Centre for Local Economic Growth (2019) Local Multipliers Toolkit, available at: <https://whatworksgrowth.org/resource-library/toolkit-local-multipliers/>



Step	Description	Value	Formula
H	Total Local Operational Jobs	50	E + G

13.5.25. Based on the numbers provided, the proposed development is likely to create a net total of 40 FTE jobs directly, plus a further 10 indirect and induced jobs – a total of 60 additional FTE jobs for current and future PCC residents (including residents relocating to the area to take up a role at the completed development). In the context of Pembrokeshire supporting 49,000 jobs in total, the magnitude of this impact is assessed as negligible.

13.5.26. With receptor sensitivity defined at paragraph 13.5.2 as high, the proposed development's effect on the working age population of Pembrokeshire (access to jobs) can be assessed as minor beneficial and permanent in nature. The effect is considered to be **minor beneficial and is considered to be not significant**.

#### ***Social Infrastructure Effects***

13.5.27. As with construction phase effects, the anticipated non-local workforce likely to relocate to the area as a result of the proposed development will grow the local population. As a reasonable worst case, it is assumed that half of the anticipated direct workforce of 60 will be new to Pembrokeshire (i.e. 30 jobs filled by people moving to the local area), and therefore create additional demands on existing social infrastructure.

13.5.28. The family composition of the future workforce is not known, and it has therefore been assumed that each staff member will bring with them a spouse/partner and an average of one school-aged child (aged 5-16). This could result in around 90 new registrations with local GP surgeries (30 staff, 30 spouses/partners, 30 children), plus school places for up to 30 children. This is considered to be a reasonable worst-case scenario.

13.5.29. As noted within the baseline conditions section, all of the nearest GP surgeries to the Site are currently accepting registrations of new patients, indicating that at least some surplus capacity exists. Furthermore, with a combined list site of 33,506, the potential addition of 90 further registrations (subject to eligibility) reflects an increase in of c. 0.3%.

13.5.30. Local schools were also found to have significant spare capacity, with the two nearest schools having a combined unused capacity of 70, plus a further 97 spare capacity across two schools in Haverfordwest. This indicates that the worst-case estimate of additional school place demand could be met by existing provision.

13.5.31. Taken together, the magnitude of impact on schools and GP practices has been assessed as low.

13.5.32. With receptor sensitivity defined at paragraph 13.5.2 as medium, the proposed development's effect on the resident population of Pembrokeshire (access to social infrastructure) is assessed as **minor adverse and permanent in nature and not significant**.

#### ***Tourism Economy Effects***

13.5.33. No permanent effects on the local tourism economy are expected during the operational phase. Permanent operational staff (with permanent contracts) are likely to live permanently within the local community (i.e. not making use of temporary accommodation which would otherwise be used by tourist visitors). Though adverse effects are identified within Chapter 9 (Landscape and Visual Impact), there is no evidence to suggest that this will reduce the number of tourist visitors to Pembrokeshire.



- 13.5.34. RAF Fylingdales, which performs a similar function to the proposed development, and is also a large structure constructed within a national park (North York Moors), appears to have had no impact on tourist visitor numbers – which are increasing year-on-year<sup>324</sup>.

## 13.6. Mitigation & Enhancement

- 13.6.1. No mitigation measures have been proposed, on account of there being no significant adverse socio-economic effects requiring mitigation.
- 13.6.2. The applicant is in dialogue with PCC to identify opportunities to enhance beneficial socio-economic effects (such as through employment of local people and use of local suppliers where possible).

## 13.7. Cumulative Effects

- 13.7.1. Cumulative effects are considered in Chapter 17 (Cumulative Effects Assessment). No intra-cumulative or inter-cumulative effects identified for Socio-economics.

## 13.8. Residual Significant Effects

- 13.8.1. No residual significant effects have been identified in relation to Socio-Economics.

## 13.9. Monitoring

- 13.9.1. No monitoring of socio-economic effects is required.

## 13.10. Summary and Conclusions

- 13.10.1. This chapter has assessed a range of potential significant socio-economic effects arising from the proposed development.
- 13.10.2. The assessment has been prepared in line with IEMA (now ISEP) guidance and reflects a reasonable worst-case scenario. No residual significant effects have been identified.
- 13.10.3. A number of beneficial (but not significant) impacts have been identified in relation to employment – both during construction and in operation.
- 13.10.4. Adverse effects arising from the potential use of tourist accommodation by construction workers were also found not to be significant.

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<sup>324</sup> North York Moors National Park, STEAM Tourism Economic Impacts 2023 Year in Review, available at [https://www.northyorkmoors.org.uk/\\_\\_data/assets/pdf\\_file/0029/18749/NYMNP-STEAM-Infographic-2023.pdf](https://www.northyorkmoors.org.uk/__data/assets/pdf_file/0029/18749/NYMNP-STEAM-Infographic-2023.pdf) [retrieved 28/10/2025]