



# The Sizewell C Project

## 6.3 Volume 2 Main Development Site Chapter 9 Socio-economics Appendices 9A - 9F

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VOLUME 2, CHAPTER 9, APPENDIX 9A: WORKFORCE PROFILE

## Contents

1	Technical Note 1 – Workforce Profile .....	1
1.1	Introduction .....	1
1.2	Labour demand .....	3
1.3	Labour supply .....	5
1.4	Development of the workforce profile .....	8
1.5	Home-based and non-home-based recruitment .....	15
1.6	Associated development (operation) staff.....	20
1.7	Use of the workforce profile .....	22
	References .....	23

## Tables

	Table 1.1: Skill/role categories for Sizewell C construction and non-construction activities... 4
	Table 1.2: Employment estimates (Source: Business Register and Employment Survey (BRES), ONS, 2019)..... 6
	Table 1.3: In construction and related activities (Source: BRES, ONS, 2019)..... 8
	Table 1.4: Main skill/role categories for Sizewell C construction and non-construction activities..... 10
	Table 1.5: Construction workforce averaged by year (also showing peak months) by role/skill..... 14
	Table 1.6: Ranges for total local recruitment at peak construction (Stage 2 consultation for 5,600 peak workforce). .... 16
	Table 1.7: Ranges for total local home-based recruitment at peak construction. .... 17
	Table 1.8: Home-based and non-home-based labour at the proposed Sizewell C: Civil peak construction (rounded numbers). .... 17
	Table 1.9: Predicted average breakdown of home-based and non-home-based workers by year of construction period by role (non-operational). .... 19
	Table 1.10: Estimated breakdown of anticipated job roles at associated development sites..... 20

## Plates

	Plate 1.1: Sizewell C workforce profile (as presented at Stage 2 consultation). .... 12
	Plate 1.2: Sizewell C revised workforce profile (Development Consent Order). .... 14

## Figures

None provided.

## 1 Technical Note 1 – Workforce Profile

### 1.1 Introduction

#### a) Background

1.1.1 In order to plan its accommodation, transport and socio-economic strategies, SZC Co. has developed assumptions about the construction workforce that would be required to build Sizewell C. This describes how many workers would be needed throughout the construction period, and at the peak of construction, and the different roles/contract packages/activities that drive the overall profile.

1.1.2 The assessment has been produced by SZC Co. with Quod and the EDF Energy Construction Workforce Development Team for Hinkley Point C, along with information from the Construction Industry Training Board, and feedback from Hinkley Point C contractors.

1.1.3 Previous drafts of this Technical Note have been circulated to Suffolk County Council (SCC), and the former Suffolk Coastal District Council in December 2013. Comments received on the content of the note were incorporated into an updated draft in May 2014.

#### b) Content and purpose

1.1.4 This paper sets out:

- The assumptions that have been used to create, develop, and change assumptions about the workforce profile for Sizewell C over time to settle on a workforce profile that has been used across all assessments within the Environmental Impact Assessment (EIA) and supporting documents.
- Details of the workforce profile showing the workforce at Sizewell C over the duration of the construction period, including job types, and skills mix for the earlier contracts.
- An assessment of the current local labour supply.
- The predicted split of home-based (HB) and non-home-based (NHB) workers.

- 1.1.5 The findings of this note have been used to:
- Assess the likely demand for accommodation arising from NHB workers, the resultant accommodation mix (drawing also on the findings of **Appendix 9D**), and the subsequent effects on other services (health, education, policing, leisure etc.). These have been incorporated into the technical assessment of the scheme and inform the detailed mitigation strategies.
  - Inform the **Employment, Skills and Education Strategy** (appended to the **Economic Statement**) (Doc Ref. 8.9) that has been developed by SZC Co., in consultation with local stakeholders.
  - Feed into the Gravity Model to inform the **Transport Assessment** (Doc Ref. 8.5).
- 1.1.6 The focus of this Technical Note is on the peak construction workforce, but the (smaller) total workforce at the civils peak, and throughout the up to 12-year construction phase is also estimated.
- 1.1.7 This document also includes the workforce required for the construction and operation of the associated development sites.
- c) [Context for socio-economic assessment](#)
- 1.1.8 Socio-economic prediction is an inexact exercise, and the predictions and any associated mitigation and enhancement measures, should be the subject of regular monitoring.
- 1.1.9 An adaptive assessment approach is therefore required, building from the **Environmental Statement (ES)** (Doc Ref. Book 6), through more detailed forecasts for early phases of the scheme, and onto regular monitoring and effective management of impacts over the duration of the Sizewell C Project.
- 1.1.10 This note brings together the best available data for assessment and planning purposes.

## 1.2 Labour demand

### a) Source information

1.2.1 The proposed power station at Sizewell C would be a two-unit European Pressurised Reactor (EPR). The EPR is a new design and four reactors are currently under construction in Europe, two in Somerset (Hinkley Point C, Sizewell C's sister station), and one each in France (Flamanville 3), and Finland (Olkiluoto). A further two new EPRs are now operational in China (Taishan).

1.2.2 The following main sources of information have been used to develop workforce assumptions for Sizewell C:

- Workforce profiles from EDF Energy's database of previous projects for (non-EPR) two-unit reactors have been reviewed to examine the build-up of the overall workforce, and the relationship between workforce (operatives) build up for each of the two main contract packages – civils and mechanical, electrical and heating – to identify an indicative histogram.
- EDF Energy monitoring data:
  - From Flamanville 3<sup>1</sup> – used to quantify the EPR construction workforce (based on number of hours worked), and make up (between operatives and staff) to date, along with forecasts to the end of the construction period. The project began in 2007, and the monitoring data therefore covers the years 2007 to present.
  - From Hinkley Point C – monitoring data from start of construction to recent (June 2019) “J0” capturing the main element of the civils workforce phase. Monitoring data has been shared with the New Nuclear Local Authorities' Group, and sets out that Hinkley Point C's workforce is tracking above the predicted Development Consent Order (DCO) curve, though broadly following the shape of the curve.

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<sup>1</sup> As Sizewell C is a two-unit rather than single reactor, the total number of hours required to build Sizewell C is assumed to be double that for Flamanville. This assumption has been applied to the histogram, with the assumption that the mechanical, electrical and heating contracts would have the same relationships to civils as on non-EPR reactors. The conversion of hours worked to workforce numbers is based on an assumption of a typical shift pattern of average 8 hour shifts and 21 days per month per worker.

- Emerging data and recommendations from the Tier 1 (main) contractors at Hinkley Point C, including their skills and employment, and anticipated workforce mobilisation plans have also been applied.
- Feedback from public consultation, and engagement with local authorities.
- Advice from the Construction Industry Training Board.

b) Skill/role categories

1.2.3 **Table 1.1** sets out broad skill categories based on information from potential civils stage contractors, and data from Hinkley Point C monitoring and the Sizewell B construction monitoring study for both civils and mechanical, electrical and heating stages.

1.2.4 The skills mix influences the assumptions about the split of HB/NHB workers, and therefore on total demand for accommodation and accommodation demand by type.

**Table 1.1: Skill/role categories for Sizewell C construction and non-construction activities.**

Skill/Role.	Sectors
Civils operatives.	<p>Timber and formwork, concrete/cement/steel fixers, drivers, lifting operatives and supervisors, labourers, steelwork erectors, access and other plant operators, welders, civil works labourers and semi-skilled occupations:</p> <ul style="list-style-type: none"> <li>● timber/formwork;</li> <li>● concrete/cement/masons;</li> <li>● drivers/crane operators/labourers;</li> <li>● reinforced steelwork/erectors;</li> <li>● scaffolders;</li> <li>● welders;</li> <li>● civil works labourers/semi-skilled; and</li> <li>● others.</li> </ul>
Mechanical, electrical and heating operatives.	<p>Semi-skilled mechanical, electrical and heating operatives, welders, pipefitters, cabling operatives, fitters, electricians, ladders, support services, instrumentation:</p> <ul style="list-style-type: none"> <li>● mechanical, electrical and heating labourers/semi-skilled;</li> <li>● welders – special metals;</li> <li>● welders – steel;</li> <li>● boiler makers;</li> <li>● pipe fitters;</li> <li>● fitters;</li> <li>● electricians; electro-mechanical fitters;</li> <li>● instrumentation; and</li> <li>● cable pullers.</li> </ul>



Skill/Role.	Sectors
Professional and management.	Mainly professional, management-type jobs.
Site services/support.	Administrative, private security and service sector (e.g. catering, cleaning).
Associated developments.	Includes drivers, security, service-sector jobs, cleaning, maintenance and administrative jobs.

### 1.3 Labour supply

#### a) 90-minute construction daily commuting zone

- 1.3.1 Baseline data has been interrogated to provide an initial view on the potential supply of local (HB) labour. To do this, assumptions have been made as to the maximum distance workers would travel from home to the Sizewell C site – the ‘Construction Daily Commuting Zone’ (CDCZ).
- 1.3.2 The determination of the CDCZ impact area involves consideration of a number of factors which affect workers willingness to commute daily to the site. These include travel allowances for construction workers, estimates of construction workforce mobility and monitoring of previous projects.
- 1.3.3 The Construction Industry Joint Council agreement sets out national standards for pay and conditions for workers on major building and infrastructure sites in the UK (Ref. 1.1). The current agreement sets out rates for daily travel and fare allowances. These are currently payable on a sliding scale based on the distance travelled, up to a maximum of 75 kilometres (km) (c.47 miles).
- 1.3.4 Monitoring studies of the construction of Sizewell B also show actual local recruitment extending to a 50 miles/90-minute commute (Glasson and Chadwick, 1995 (Ref. 1.2)).
- 1.3.5 Discussions with the local authorities at socio-economics workshops in 2012 and 2013 suggested that some workers may travel further on a daily basis than a 90-minute commute. This comment was also made by SCC in their response to the initial gravity modelling conducted before Stage 1 consultation – with reference to studies from other construction projects which have indicated a willingness of some construction workers to travel more than 50 miles daily commute.
- 1.3.6 SZC Co. accepts the principle of this point, and that evidence suggests that some construction workers are willing to travel long commuting distances on a daily basis, but that the proportion of HB workers travelling from longer

distances on a daily basis would be materially lower than data from other construction projects/surveys might suggest for the following reasons:

- Employment at Sizewell C would often be of a longer duration than for smaller construction projects, this would impact on workers’ willingness to tolerate sustained long commutes over long periods of time.
- The length of shifts, while typical for large construction projects, is significant and, again, this would impact on workers’ willingness to commute long distances.
- The provision of affordable good quality campus accommodation close to the construction site (in addition to other local accommodation sources) is expected to be a very attractive option for many workers who would otherwise have to travel long distances on a daily basis.
- Commuting times would include a changeover at park and ride sites – this would act to reduce the overall distances that workers are willing to travel.

1.3.7 As noted above, a commuting zone of around 50 miles (90 minutes) is also supported by the evidence of Sizewell B construction, where the vast majority of HB workers were located within 35 miles of the construction site.

1.3.8 Taking account of the above considerations, for socio-economic and transport modelling purposes, an assumption has been made that the large majority of HB workers would be recruited from within a 90-minute commuting zone but that the CDCZ is not limited to 90 minutes.

b) Labour supply – all roles/skills

1.3.9 **Table 1.2** shows the labour supply (currently in employment) within administrative geographies in the CDCZ , highlighting that:

- Across the CDCZ, there are an estimated 728,000 employee jobs, which represent approximately one quarter of all employee jobs across the East of England (2.78 million jobs).

**Table 1.2: Employment estimates (Source: Business Register and Employment Survey (BRES), ONS, 2019).**

Area	Employee Jobs (2019).	Employment (2019).
<b>Local wards.</b>		
Leiston	2,500	2,500

Saxmundham	2,000	2,000
Snape	300	350
Yoxford	700	800
Aldeburgh	1,500	1,500
<b>Districts</b>		
Great Yarmouth.	37,000	38,000
South Norfolk.	54,000	57,000
East Suffolk.	91,500	96,000
Of which in former Suffolk Coastal.	51,000	54,000
Of which in former Waveney.	40,500	42,000
Mid Suffolk.	36,000	38,000
Ipswich	71,500	73,000
Babergh	32,500	34,000
<b>Other scales.</b>		
60-minute travel area.	106,000	111,000
CDCZ (90-minute travel area).	728,000	753,000
<b>Wider scales.</b>		
Norfolk	368,000	388,000
Suffolk	323,000	339,000
East	2,781,000	2,880,000
England	25,976,000	26,842,000

c) Labour supply – construction

1.3.10 **Table 1.3** shows the labour supply within administrative geographies in the CDCZ in relevant sectors, highlighting that:

- The CDCZ has around 37,000 jobs in the construction sector – with more than half in specialised construction activity roles.
- There were around 18,500 employee jobs in the construction sector in the immediate districts in 2019, plus a further 5,500 employee jobs in the related activities of architecture, engineering and technical consultancy. These estimates exclude self-employed jobs.

**Table 1.3: In construction and related activities (Source: BRES, ONS, 2019).**

Area	Construction of Buildings (Standard Classification (SIC) 41).	Civil Engineering (SIC 42).	Specialised Construction Activities (SIC 43).
<b>Districts</b>			
East Suffolk.	1,700	500	2,500
Of which in former Suffolk Coastal.	1,000	300	1,250
Of which in former Waveney.	700	200	1,250
Great Yarmouth.	400	175	1,000
South Norfolk.	800	700	1,750
Mid Suffolk.	800	2,000	1,500
Ipswich	800	800	1,250
Babergh	600	225	1,000
<b>Other scales.</b>			
60-minute travel area.	2,400	700	3,100
CDCZ (90-minute travel area).	11,400	5,600	20,000
<b>Wider scales.</b>			
Norfolk	6,000	2,500	12,000
Suffolk	5,000	3,500	9,000
East	52,000	23,000	90,000
England	406,000	180,000	693,000

## 1.4 Development of the workforce profile

### a) Key project milestones and phases

1.4.1 The workforce profile assumes that the construction phase would take up to 12 years. Within this period, activities and work packages affect the number, and types of roles that the Sizewell C Project would need.

#### i. Early years and construction of associated development sites

1.4.2 During the early years, the predominant activity is civil construction, and construction of supporting development including the associated development sites that would support the rest of the Sizewell C Project's construction.

1.4.3 The profile of the early years is largely based on Hinkley Point C's construction requirements (though not including demobilisations that

occurred at Hinkley Point C). It has a slight variation to Hinkley Point C however, as it incorporates a different earthworks approach for Sizewell C, including the need to construct a cut-off wall. It also reflects a slightly steeper curve, and incorporates a higher ratio of project management roles.

ii. “J0” (nuclear concrete)

1.4.4 J0 is the date SZC Co. uses to denote the first pour of nuclear safety related concrete – a standard milestone in French nuclear construction.

1.4.5 J0 also coincides with the beginning of the build-up of permanent operational employment to prepare for the completion of the first unit, to a peak of 900 at completion of both units. These are early operational workforce assumptions, and may change over time although, as can be seen from the histograms, any changes would not have an effect on overall peaks as the main operational workforce build up is later in the Sizewell C Project.

iii. Civils peak

1.4.6 The peak of civils activity occurs half way through year five, at around 3,600 civils workers. The civils workforce has a higher propensity to be drawn from the existing labour market than higher skilled, or more specialist mechanical, electrical and heating roles.

1.4.7 At the civils peak, the total workforce is anticipated to be over 6,000. Following the civils peak, civils roles reduce and mechanical, electrical and heating roles ramp up, as do operational roles. The supporting roles – site services, and management/professional roles are relatively steady at this point, peaking with the overall peak, as these roles are more closely linked to the overall workforce and site capacity.

iv. Overall peak (and start of mechanical, electrical and heating peak)

1.4.8 The overall peak occurs during year seven, with 7,900 roles in peak months. At this point, the civils workforce has reduced from the civils peak by around 40%, while the mechanical, electrical and heating roles have grown and peaked at up to 3,300 roles – supported by management/professional, and site support roles.

1.4.9 The mechanical, electrical and heating roles plateau for around a year at this point before reducing, and leading to a sharp decline in all jobs at the site, while operational roles increase.

v. Post-peak and operation

1.4.10 The last years of construction activity see the dismantling of associated development facilities like the accommodation campus (supported by project management, professional and site support roles), and civils activity to remove and reinstate any temporary development areas. The operational workforce reaches its peak of 900 around two years before the end of the construction phase.

b) Construction roles (civils)

1.4.11 **Table 1.4** sets out the assumptions used for the early years of the Sizewell C Project in respect of the civils construction element of the workforce. The forecasts provide indicative volumes and proportions of occupations that would be required in 11 broad occupation and skills groups. These are represented using illustrative six month breakdowns of the workforce. This allows the model to show the changing proportions of different occupations within the workforce at different points in the Sizewell C Project programme.

**Table 1.4: Main skill/role categories for Sizewell C construction and non-construction activities.**

Phase		Description of Civils Construction Activities.
First six months.	six	In the initial six-month period of the main programme, it is anticipated that up to half of all construction workers are likely to be drawn from civil engineering and structural trades. At this time, the workforce is expected to expand rapidly. There would also be a large cohort of wood trades and plant operatives, which would be associated with formwork carpentry and civil engineering preliminary work.
Months seven to 18.	seven to 18.	As the Sizewell C Project starts to mature, the numbers in the workforce would grow steeply. Within the overall workforce, the numbers of civil engineering operatives would increase, but their relative proportion within the overall workforce is predicted to decrease, as structural trades, such as reinforcing bar fixers, increase in prominence. Wood trades and plant operatives increase in number but remain at a similar percentage of the workforce as in the first six months. These workforce patterns are to continue to the end of the period.
Months 19 to 24.	19 to 24.	By months 19–24 of the main civils contract (i.e. J0–11 to J0–6), it is anticipated that the preliminary works would be complete, and the major civil engineering works would be the dominant project at Sizewell C. The model reflects this, indicating a high proportion and correspondingly large numbers of structural and wood trades within the workforce.

1.4.12 Skills and employment interventions are expected to be required to support the construction of Sizewell C. These will be designed to align with the needs of SZC Co., its contractors, and the wider local economy during the build.

1.4.13 In order to design effective employment, skills and training interventions, the need for these must be evidence-based, through the effective utilisation of labour forecasts, work package analysis, contractor engagement and broader labour market intelligence.

1.4.14 This is an iterative process, and will continue to be developed and refined by SZC Co., in association with local stakeholders. Skills gaps and requirements would be identified with sufficient time for specific provision, and appropriate funding mechanisms to be designed and programmed in advance.

c) [Non-construction roles](#)

1.4.15 In addition to construction operatives, it is assumed that staff and management (contractors and SZC Co. combined), on-site services, security, and clerical roles are equivalent to a fixed proportion of the total workforce.

1.4.16 These assumptions are based on previous experience at Sizewell B, Flamanville and other EDF Energy operations including monitoring from Hinkley Point C and early contractor feedback.

d) [Early development of the workforce profile](#)

1.4.17 At Stage 1 consultation, SZC Co. set out the process for calculating the 'workforce profile' (the number and skill breakdown of workers on the Sizewell C Project over the course of the construction phase).

1.4.18 At Stage 2 consultation, SZC Co. presented changes to the workforce profile based on a number of different sources of data, including advice from contractors and bodies within the industry, emerging data from Tier 1 contractors (those companies at the top of the supply chain, who often manage and delegate to several role-specific contractors at lower tiers) on the Hinkley Point C project, as well as monitoring from other projects (e.g. EDF Energy's Flamanville 3 project in France).

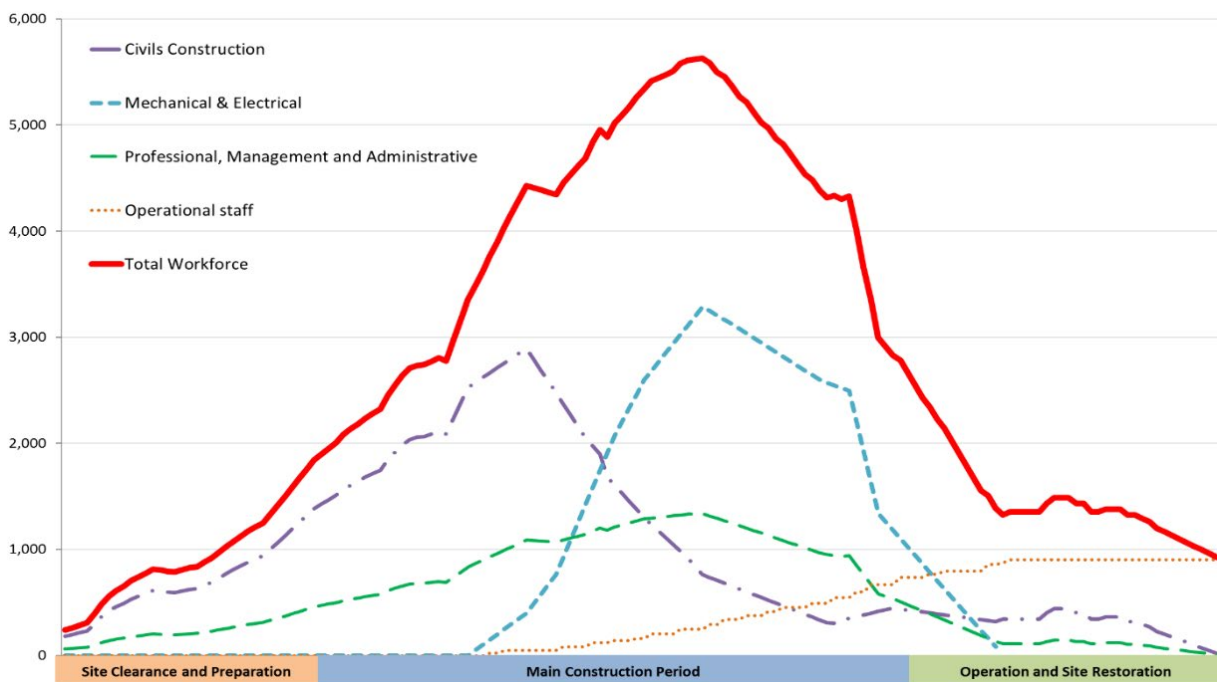
1.4.19 Workforce profiles from EDF Energy's database of previous projects for (non-EPR) two-unit reactors were also reviewed to help determine the relationship between the two main contract packages (main civils works and mechanical, and electrical (now known as mechanical, electrical and heating) to identify an indicative histogram.

1.4.20 **Plate 1.1** sets out the workforce profile presented at Stage 2 consultation, which incorporated refinements in SZC Co.'s understanding following Stage 1 consultation, the key difference being in the earlier years of construction – the Stage 1 consultation profile was based on Hinkley Point C, whereas this

revised version incorporated a different earthworks approach for Sizewell C including the need to construct a cut-off wall.

1.4.21 At Stages 1 and 2, a workforce of around 5,600 construction workers was anticipated at the peak of the construction phase (with an additional 500 staff working at the operational associated developments including campus and park and ride facilities, which are not included in this profile).

**Plate 1.1: Sizewell C workforce profile (as presented at Stage 2 consultation).**



e) Revised considerations – workforce profile for Development Consent Order

1.4.22 Since the development of the workforce profile set out in **Plate 1.1**, SZC Co. has gained more information – particularly from monitoring of the construction workforce at Hinkley Point C, and have made a number of revised assumptions about the profile of the workforce. These are:

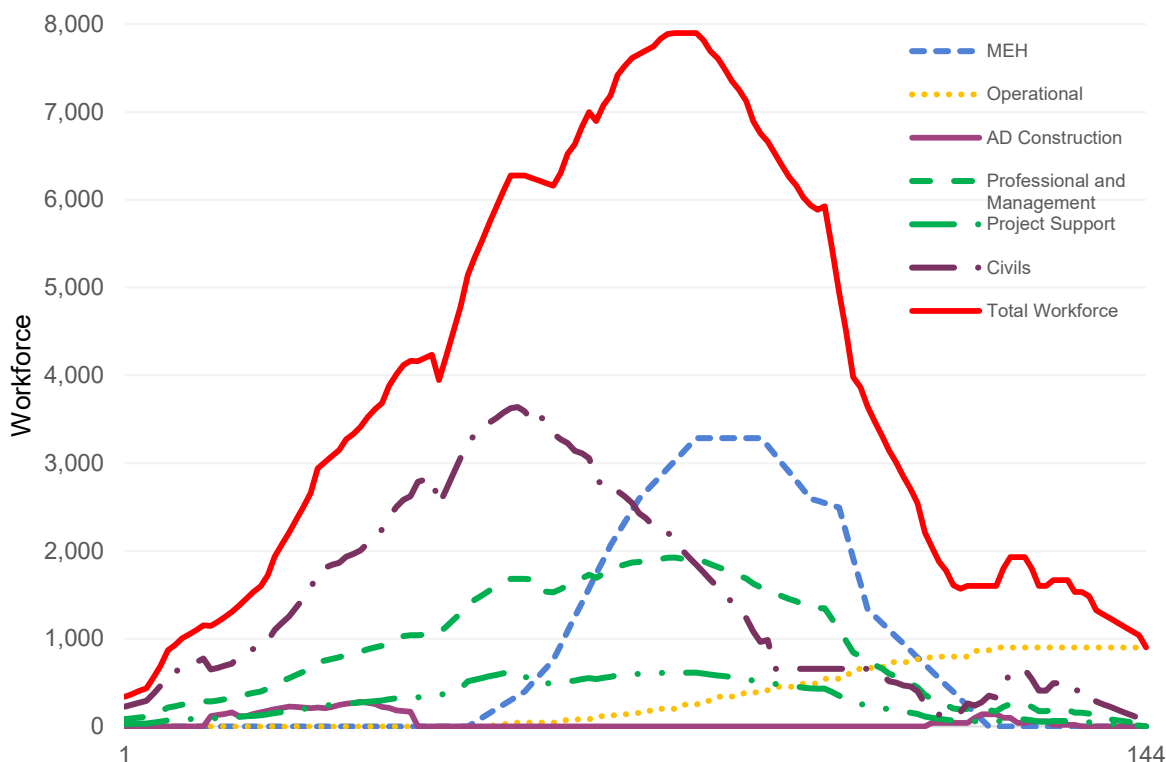
- That the workforce is likely to exceed 5,600 at peak, and may reach up to around 7,900 at the peak of construction activity (which is still the mechanical, electrical and heating peak).
- The overall workforce has been scaled up from initial assumptions across the profile proportionate to the increased peak.



- For mechanical, electrical and heating roles, which are constrained by the capacity of the areas within the site where operatives can work, the overall peak remains as per the peak in **Plate 1.1** – though has been elongated to reflect a more sustained period of activity for roles such as welding.
- Advice from contractors and feedback from Hinkley Point C has identified that professional and management roles are likely to account for around 25% of the overall workforce across the profile (these roles are driven by the overall demand for workforce).
- Advice from contractors and feedback from Hinkley Point C has identified that project support roles are likely to account for around 8% of the overall workforce across the profile (these roles are driven by the overall demand for workforce).
- Civils roles are likely to peak at around 3,600 roles based on early feedback from contractors and experience from other projects.

1.4.23 These revisions have been drawn together to set the workforce profile that has been used to inform the **ES**, and other assessments supporting the DCO. The profile by skill/role is set out in **Plate 1.2**.

**Plate 1.2: Sizewell C revised workforce profile (Development Consent Order).**



1.4.24 **Table 1.5** sets out the construction workforce by role/skill at each year of the Sizewell C Project based on **Plate 1.2**, including the civils peak and the overall peak.

**Table 1.5: Construction workforce averaged by year (also showing peak months) by role/skill.**

Year	Total	Civils	Associated Development Construction / Demolition.	Mechanical and Electrical Heating.	Professional and Management.	Site Support.	Operational.
1	740	500			190	60	
2	1,570	890	160		390	130	
3	3,070	1,820	240		770	250	
4	4,160	2,660	80		1,070	350	
5	5,940	3,490		300	1,580	550	30
Civils Peak.	6,280	3,640	0	350	1,680	560	40
6	6,930	2,940		1,640	1,710	550	100
7	7,800	2,040		3,030	1,890	600	230
Peak	7,900	2,130		3,030	1,920	620	200

Year	Total	Civils	Associated Development Construction / Demolition.	Mechanical and Electrical Heating.	Professional and Management.	Site Support.	Operational.
8	6,660	980		3,120	1,580	510	410
9	4,470	640		1,950	980	310	600
10	2,120	280	30	590	330	110	780
11	1,730	470	80	10	210	70	890
12	1,280	250			100	30	900

## 1.5 Home-based and non-home-based recruitment

1.5.1 Previous research has shown that the potential for HB recruitment is influenced by the skill level required for the job, with the percentage of local recruitment being higher the less skilled the job, and/or the more abundant the availability of skills in the local labour market.

1.5.2 With relatively small levels of demand for site services, low skill requirements, relatively high wages, and large availability of labour supply (both employed and unemployed), there should be few problems in meeting the high proportions of HB recruitment which have been the norm for this category of employment on other power station construction sites.

1.5.3 In contrast, the much higher levels of demand for professional and managerial staff, the high skill requirements, the tendency for the developer and main contractors to second staff from ‘head office’, and the relative shortage of such skills in the area indicate that lower proportions of HB recruitment are likely to be achieved, although possibly at the upper end of recent such project experience.

1.5.4 The civils and mechanical, electrical and heating operatives fall between these two. Significant elements of the civils work would be suitable for local residents (and contractors) as the degree of specialism required for nuclear construction is relatively low, and residents would therefore be able to mechanical, electrical and heating work with little or no additional training.

1.5.5 For mechanical, electrical and heating work, the degree of specialism is higher and the proportion of local residents with the necessary skills is consequently lower. For some trades, especially in the mechanical, electrical and heating phase, there simply are not enough local workers with the necessary specialist skills so NHB recruitment would be higher.

a) Initial considerations – Stage 1 and Stage 2 consultation

1.5.6 **Table 1.6** sets out predictions for levels of local recruitment set out in public consultation Stage 2 for a 5,600 peak workforce, informed by:

- power station workforce category requirements;
- initial information (on civil works) from Hinkley Point C contractors;
- discussion with the Construction Workforce Management Team at Hinkley Point C and the Construction Industry Training Board;
- the availability of local supply using 2011 Census data on the economic activity and skill level of existing residents;
- comparative information from other UK power station projects and also from Flamanville 3<sup>2</sup>;
- assumptions on commuting distances; and
- feedback from local authorities.

**Table 1.6: Ranges for total local recruitment at peak construction (Stage 2 consultation for 5,600 peak workforce).**

Skill/Role.	Range from Previous Studies.	Specific case of Sizewell B Peak Construction from Monitoring Data.	Peak HB (Stage 2 Workforce Profile Assumptions).
Civil operatives (including associated development construction).	45% to 75%.	61%	50%
Mechanical, electrical and heating operatives.	35% to 50%.	38%	30%
Professional and management.	2% to 20%.	33%	15%
Site services/support.	90% to 100%.	96%	90%

<sup>2</sup> Flamanville 3 (which had double the peak workforce expected at Sizewell C) has achieved around 45-50% HB recruitment from La Manche in the civils phase. This area has a population of about 500,000, which is smaller than the population of Suffolk (730,000).

b) Revised considerations for Development Consent Order

1.5.7 The workforce profile has subsequently been developed to account for a higher peak workforce, as well as amended assumptions for the distribution of skills/roles within the overall profile.

1.5.8 This has potential implications for NHB workforce recruitment potential related both to the overall demand for workers and the types of jobs that would be available, as well as interventions that would be applied to the market through the **Employment, Skills and Education Strategy - Annex A to the Economic Statement** (Doc Ref. 8.9).

1.5.9 **Table 1.7** sets out predictions for levels of local recruitment.

**Table 1.7: Ranges for total local home-based recruitment at peak construction.**

Skill/Role.	HB Recruitment Number (at Peak) – Remains Same for 7,900 as for 5,600 Workforce Profile Consulted on at Stage 2.
Civil operatives.	460
Associated development construction.	0
Mechanical, electrical and heating operatives.	650
Professional and management.	150
Site services/ support.	550
<b>Total</b>	<b>1,810</b>

1.5.10 Broad estimates of potential HB and NHB recruitment from within the CDCZ at civils peak, and at the overall peak are set out in **Table 1.8** (not including operational workforce).

**Table 1.8: Home-based and non-home-based labour at the proposed Sizewell C: Civil peak construction (rounded numbers).**

Skill/Role.	Civils Peak.			Overall Peak.		
	HB	NHB	Total	HB	NHB	Total
Civil operatives.	845	2,744	3,589	456	1,674	2,130
Associated development construction.	0	0	0	0	0	0
Mechanical, electrical and heating operatives.	140	260	400	648	2,378	3,026
Professional and management.	135	1,548	1,683	154	1,770	1,924
Site services/support.	505	56	561	554	62	616

- 1.5.11 As implied by **Table 1.8**, the proportion of the total workforce which would be HB would vary over the period of the development, with a higher proportion at the outset, which then reduces as the Sizewell C Project moves towards its peak, and increases again towards completion.
- 1.5.12 The overall number of local opportunities would however continue to increase as the Sizewell C Project moves towards peak (representing a slightly lower proportion of an increasing number of jobs).
- 1.5.13 This phasing of jobs provides partners with the opportunity to increase local workforce proportions in the later stages by recruiting local people in the earlier stages for lower skilled jobs, and helping them to develop their skills, and move between contractors, and different types of contract throughout the construction period. This approach has been a successful feature of large-scale construction projects, and depends on a concerted effort at the early stages to produce high quality skills information, and tailored programmes to address local needs.
- 1.5.14 The higher HB percentage for the total workforce at the civils peak reflects the greater propensity for HB recruitment for the civil operatives' category. Conversely, the lower percentage for the total peak reflects in particular the lower propensity for HB recruitment for the more skilled and larger number of mechanical, electrical and heating operatives.
- 1.5.15 **Table 1.9** shows an indicative HB and NHB breakdown by role, based on annual average roles across the construction workforce profile.

**Table 1.9: Predicted average breakdown of home-based and non-home-based workers by year of construction period by role (non-operational).**

	TOTAL		Civils		Associated Development Construction/ Demolition.		Mechanical, Electrical and Heating.		Professional and Management.		Site Support.	
	HB	NHB	HB	NHB	HB	NHB	HB	NHB	HB	NHB	HB	NHB
1	220	520	150	350					10	170	50	10
2	510	1,060	270	630	100	60			30	360	110	10
3	940	2,130	510	1,310	140	100			60	710	220	20
4	1,140	3,020	690	1,970	50	30			90	980	310	30
5	1,560	4,350	840	2,650			100	190	130	1,450	500	60
6	1,810	5,000	710	2,230			470	1,150	140	1,570	490	50
7	1,780	5,780	440	1,600			650	2,380	150	1,740	540	60
8	1,610	4,580	240	740			780	2,330	130	1,460	460	50
9	1,180	2,690	170	460			650	1,290	80	900	280	30
10	420	920	70	210	20	10	210	380	30	310	100	10
11	240	590	120	360	50	30			20	190	60	10
12	100	280	60	190					10	90	30	

## 1.6 Associated development (operation) staff

- 1.6.1 The peak of operational staff at the associated development sites is expected to occur alongside the main construction peak, to support the maximum occupation of the accommodation campus and caravan site at Land East of Eastlands Industrial Estate (LEEIE), and greatest usage of park and ride sites and Freight Management Facility (FMF).
- 1.6.2 This approach aligns with the approach to assessing the socio-economic and transport impacts at their highest point, and ensures that the information presented here is comparable with the core assumptions of the Gravity Model and traffic modelling.
- 1.6.3 A specific associated development workforce curve for the entire construction period has not been provided because, in the context of the overall construction workforce profile, the workforce at the associated development sites is low.
- 1.6.4 However, the construction workforce required to build the associated development sites is included within the overall draft workforce profile for Sizewell C. This workforce profile was developed based on the profiles for Hinkley Point C, which included an allowance for construction workers involved in park and ride sites, campuses and road infrastructure, and in broad terms will be similar to the requirements at Sizewell C.
- 1.6.5 The main sources of information used to produce workforce assumptions for Sizewell C’s associated development sites include scaling up assumptions made for the operation of similar facilities at Hinkley Point C.
- 1.6.6 **Table 1.10** sets out an estimated breakdown of anticipated job roles by Full Time Equivalent (FTE) jobs and headcount.

**Table 1.10: Estimated breakdown of anticipated job roles at associated development sites.**

Job Role.	Estimated Employment.
<b>Accommodation campus and LEEIE caravan site</b>	
Security	25
Administration	25
Cleaning	120
Waste	5
Catering	115
Repair and maintenance.	5
Bar	15



Job Role.	Estimated Employment.
TOTAL FTEs.	315
<b>Headcount (assuming two shifts per role except for administration, maintenance and waste).</b>	<b>580</b>
<b>Park and ride and Freight Management Facility sites.</b>	
Security	6
Other Misc.	8
TOTAL FTEs.	6
<b>Headcount (assuming two shifts per role).</b>	<b>20</b>

1.6.7 The following assumptions are included within the above estimates:

- Shift patterns are included in the headcount (i.e. if 24-hour presence required for security, eight no above is actually 16 staff – plus for weekend, holiday cover etc.).
- Campus security team includes two mobile staff.
- Campus admin team includes finance.
- Campus cleaning teams include chambermaids.
- Security may include support staff – parking attendants rather than security officers.
- Campus numbers includes retail shop staff.
- Campus repair and maintenance includes teams also dealing with other associated development sites.
- In relation to catering (and cleaning staff) there are likely to be many more staff employed due to shift patterns.
- Numbers exclude mechanical, electrical and heating maintenance, etc. subcontractors.

1.6.8 At peak, there will be an estimated 600 staff employed at the associated development sites (individual jobs, rather than FTE).

1.6.9 Given the type of roles generated by the park and rides and campus, (mainly site services, security, clerical, process and elementary jobs), all of

the associated development staff are assumed to be HB (at Sizewell B, these jobs were between 90–100% locally recruited).

- 1.6.10 Additionally, there is a tendency for jobs in these sectors to be filled by people who live more locally than other, higher skilled sectors. Data from the 2011 Census indicates that, for the UK as a whole, around three quarters of jobs in the majority of these sectors are occupied by people living within 10km of their workplace.
- 1.6.11 This is a measure of average commuting distance for the UK as a whole, including dense areas of population with very short commuting distances in lower skilled sectors (such as in London), as well as more sparsely populated areas, and is used as a guide to the overall trends in the sector. The distribution of population in the Sizewell C 60-minute area is sparse, and located in a few small population centres (e.g. Leiston), and therefore the Gravity Model assumes a slightly wider workforce distribution. The Gravity Model recognises, however, that these jobs will be taken up by a more local population compared to construction roles, which require a narrower skill set.
- 1.6.12 Within the Gravity Model, it is therefore assumed that these jobs are drawn from within 45 minutes of the Sizewell C Main Development Site (as a proxy for campus location, which comprises the majority of the associated development workforce jobs – some jobs will be located at the park and ride sites, but given the relative distance from the main site to the proposed park and ride sites, and the edge of the 45-minute catchment, these jobs are likely to be included within this area).

## 1.7 Use of the workforce profile

- 1.7.1 The workforce profile has been used to underpin the assessment of the socio-economic impacts of the construction phase of the Sizewell C development. It informs SZC Co.'s strategy for accommodating construction workers, and for transport, including the Gravity Model which identifies the likely locations where the workforce would be resident.
- 1.7.2 This information has been used to inform the assessment of the likely overall population impacts and impacts on public services and local communities.

The information has also helped plan for and would help to monitor and implement the **Employment, Skills and Education Strategy - Annex A** to the **Economic Statement** (Doc Ref. 8.9), including interventions to increase the proportion of HB workers, wherever possible. The skills forecasts may be updated throughout the Sizewell C Project, and informed by an ongoing system of monitoring.

## References

- 1.1 Construction Industry Joint Council. Resolution and Promulgation Working Rule Agreement as amended from May 2019. (Online) Available from: <https://www.cip-books.com/> (Accessed 20 September 2019)
- 1.2 Glasson, J and Chadwick, A. The local socio-economic impacts of the Sizewell B PWR power station construction project 1987–1995: Summary report. Impacts Assessment Unit: Oxford Brookes University. 1995.



VOLUME 2, CHAPTER 9, APPENDIX 9B: DEMOGRAPHIC BENCHMARKS  
AND WORKFORCE CHARACTERISTICS

## Contents

1	Technical Note 2 – Demographic Benchmarks and Workforce Characteristics.....	1
1.1	Introduction.....	1
1.2	Construction workforce demographics.....	2
1.3	Demographic benchmarks.....	4
	References .....	14

## Tables

Table 1.1: UK workforce and construction workforce; migrant/non-migrant (rounded) (Census, ONS, 2011). .....	10
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## Plates

Plate 1.1: Age and gender breakdown in the construction sector (census 2001 and 2011). .	4
Plate 1.2: Construction workforce by age in the UK (left) and East of England (right) (Annual Population Survey 2018). .....	5
Plate 1.3: UK construction workforce by occupation and gender (Annual Population Survey 2018). .....	6
Plate 1.4: East of England construction workforce by occupation and gender (Annual Population Survey 2018). .....	6
Plate 1.5: Ethnic group of employed construction workers (Annual Population Survey, ONS 2018). .....	9

## Figures

**None provided**

## 1 Technical Note 2 – Demographic Benchmarks and Workforce Characteristics

### 1.1 Introduction

1.1.1 Sizewell C would generate a significant number of jobs during the construction phase, within civils-type and more skilled mechanical/electrical construction roles. Some of these jobs would be taken by existing residents, and others would be taken by a workforce temporarily brought into the area (and predicted to take temporary accommodation up to 60 minutes from the site). SZC Co. is concerned to ensure that this 'non-home-based' (NHB) workforce causes as few significant adverse effects as possible and has been working with Suffolk County Council (SCC), and East Suffolk Council (ESC) to identify and scope potential effects, and measures to avoid, minimise and mitigate them.

1.1.2 This note considers the possible demographic make-up of the NHB workforce, which is important to help inform the assessment of impacts on local accommodation, community facilities, and public services (such as healthcare, education (for workers with children), social services and sports and leisure facilities), and to direct mitigation to where it would be most effective.

1.1.3 Building a profile of the construction workforce has informed SZC Co.'s approach to embedded measures in the design of the scheme to respond to demographic and population characteristics (such as religion or language, for example, which would inform the inclusion of faith facilities and translation services within the Sizewell C Project). It has also informed engagement with the community, and local authorities who provide public services to prepare for any potential service demand from specific groups, and to ensure that barriers to integration of workers and the community are limited.

1.1.4 The note uses:

- benchmark data on the profile of the UK construction workforce, which gives an illustration of the potential profile at Sizewell C from National Statistics including 2011 Census (Office for National Statistics (ONS), 2011) and Annual Population Survey (ONS, 2019);
- detailed data from the socio-economic technical workstream, and experience of previous major construction projects including Hinkley Point C; and

- research and surveys from construction industry bodies such as the Construction Industry Training Board (CITB).

1.1.5 It should be noted that demographic patterns do vary over time so that while some construction workforce characteristics have been fairly predictable – e.g. predominantly male manual workers – others have the potential to vary depending on the type of project, and the wider conditions in the local, regional and national labour market. These benchmarks are therefore intended to provide a basis for informed workforce planning using the best information that is currently available. Monitoring arrangements would be put in place through the construction period to ensure the effective management of impacts over the duration of the Sizewell C Project.

1.1.6 SZC Co. will aim to raise diversity where possible by removing barriers to work and implementing education, employment, training and recruitment activities that aim to foster a diverse workforce for the construction, and nuclear engineering sector generally.

1.1.7 SZC Co. is aware of the challenges facing the construction sector, and has identified opportunities to tackle these issues through the Sizewell C Project and national programmes (see employment, education and skills section), predominantly:

- That the UK construction workforce is ageing, potentially reducing the skills base in the future as workers retire from the sector.
- That the workforce lacks diversity, and that routes into construction for hard-to-reach groups, and in particular women are lacking.
- That availability of skills in the UK construction workforce is highly influenced by political and economic climate at any given point in time, and the extent of migrant labour is dependent on availability of skills in the UK-based sector.

## 1.2 Construction workforce demographics

### a) Approach

1.2.1 This note sets out estimates of the numbers, likely phasing, and types of workers required to construct Sizewell C. It draws on assumptions from other Technical Notes appended to **Volume 2, Chapter 9** of the **Environmental Statement (ES)**, including the likely proportions of the workforce who already live within 90 minutes of the site, and would

commute daily (the home based (HB) workforce), and those who would move into the area (defined as a 60-minute radius), mostly on a temporary basis, to work on the construction project (the NHB workers).

1.2.2 These overall numbers are the starting point for assessing the likely impacts of the construction workforce. In order to be able to have a more detailed understanding of likely impacts it is necessary to have a more refined picture of the people who would comprise this workforce, particularly the NHB workers.

1.2.3 This paper considers a range of source data on the construction labour force in the UK to identify potential demographic breakdowns of this workforce, particularly of those groups covered by the Equality Act 2010 for which data is available (Ref. 1.1). These are:

- age;
- sex;
- disability; and
- race.

1.2.4 Data are not available for other equalities groups identified in the Equality Act 2010, but they have been considered in a qualitative way, where practicable and appropriate.

1.2.5 In addition to these demographic breakdowns, this report also considers the extent to which workers are likely to bring dependants to the area, as this could have some specific impacts on public services.

#### b) Source information

1.2.6 SZC Co. has sought to identify the most up to date, comprehensive and relevant datasets to undertake this analysis, and has particularly sought to find information that is broken down to at least regional level, to be able to explore local dimensions. The key data-sources used include:

- Census data from 2001 (ONS, 2001) and 2011 Census (ONS, 2011) – for the 2 million construction workers in the UK;
- Annual Population Survey (ONS, 2019); and



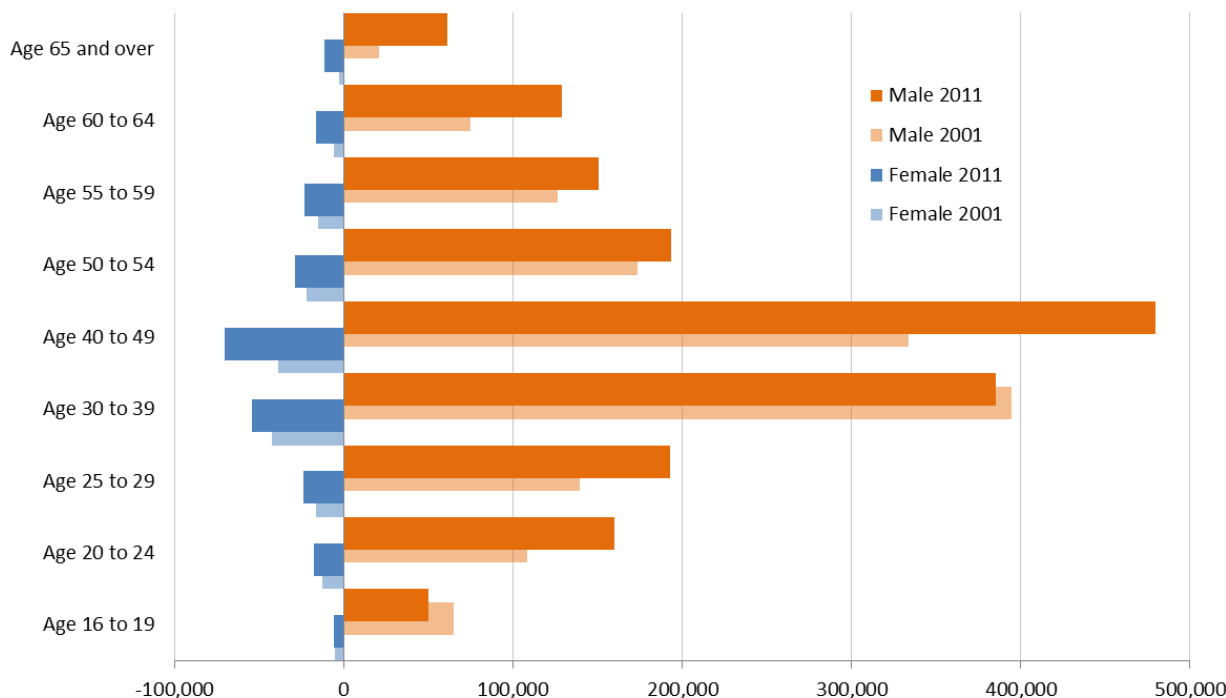
- Secondary research from industry bodies such as Construction Skills Network//CITB.

### 1.3 Demographic benchmarks

#### a) Age and gender

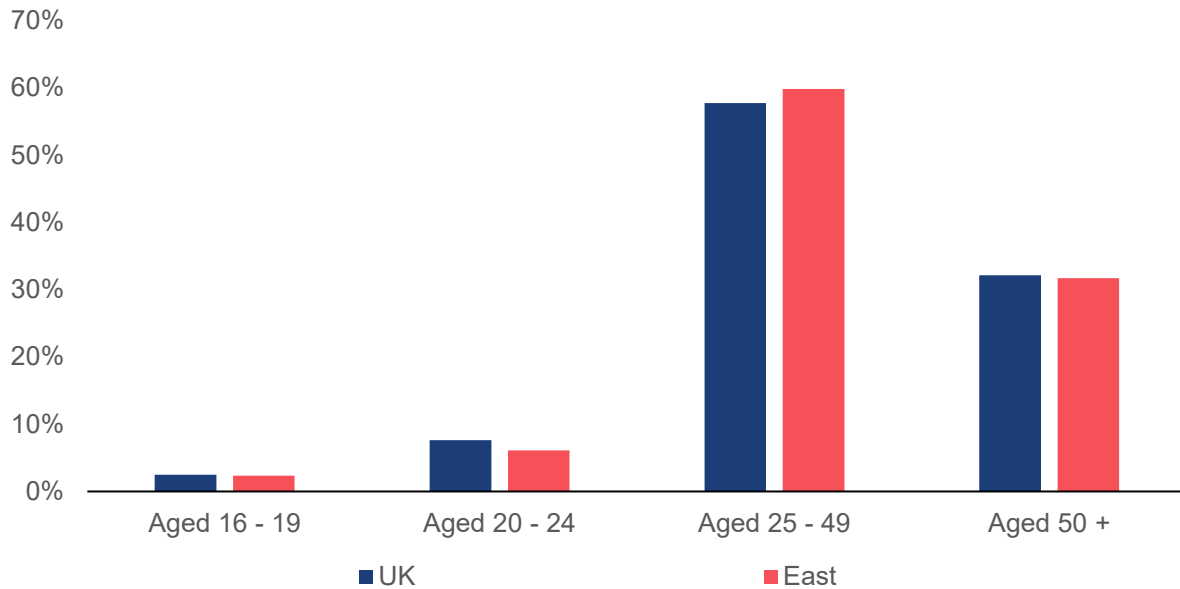
1.3.1 The 2011 Census gives a comprehensive overview of age and gender structures of the UK construction industry, and demonstrates that the workforce is overwhelmingly male and in the 20–49 age range (**Plate 1.1**). Some notable points are evidence of an ageing workforce since 2001, and a significant proportional increase in female construction employees (up 54% since 2001, compared to 25% growth in male construction workers).

**Plate 1.1: Age and gender breakdown in the construction sector (census 2001 and 2011).**



1.3.2 **Plate 1.2** shows the age breakdown of the UK and East of England construction workforce from the Annual Population Survey (2017/18) (ONS, 2019). This shows that the majority of construction workers fall into the 20–49 age bracket, representing 58–60% of the workforce.

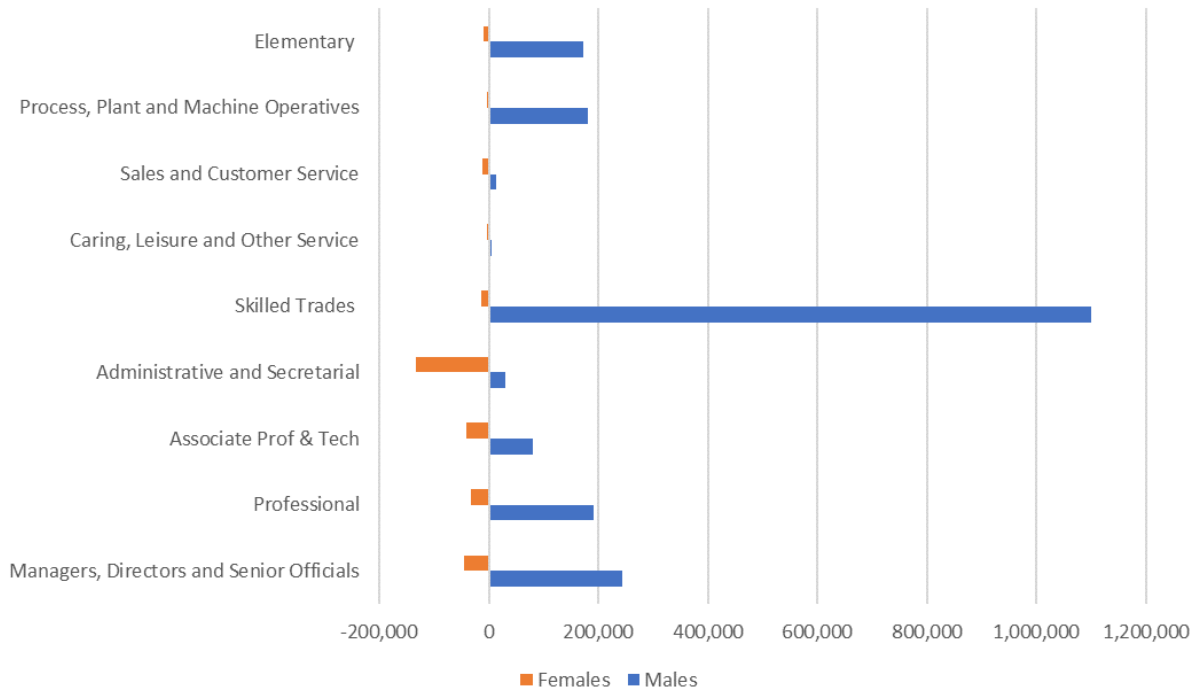
**Plate 1.2: Construction workforce by age in the UK (left) and East of England (right) (Annual Population Survey 2018).**



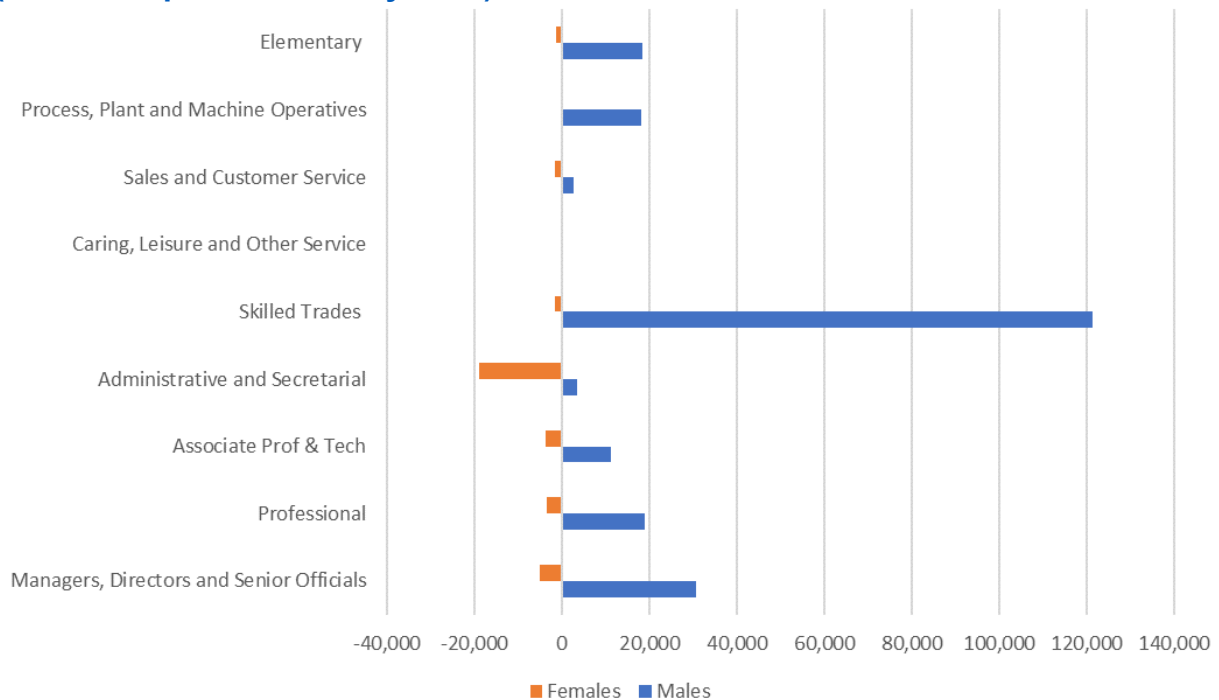
b) Gender and occupation

**1.3.3** **Plate 1.3** and **Plate 1.4** show the gender breakdown by occupation type within the UK and East of England construction sector. This shows that while women make up the majority of the workforce in administrative and secretarial occupations, and 15% of professional and managerial positions, the typical on-site operative occupations (skilled trades, elementary and operatives) are male-dominated. As these occupations make up a significant proportion of all jobs in the sector, in total just under nine out of ten workers in the construction sector are men.

**Plate 1.3: UK construction workforce by occupation and gender (Annual Population Survey 2018).**



**Plate 1.4: East of England construction workforce by occupation and gender (Annual Population Survey 2018).**



- 1.3.4 In the East of England, where Sizewell C would be located, a slightly larger percentage of the construction workforce are men, taking around 92% of jobs compared to 88% in the UK. Administrative and secretarial roles in construction in the East of England are dominated by women, similar to UK averages.
- 1.3.5 Additionally, sales and customer service occupations within construction in the East of England have a higher proportion of female workers than in the UK as a whole, at 85% compared to 48% nationwide. There is also a significantly higher proportion of women working in elementary occupations in the East of England – at 17% compared to 5% in the UK as a whole.
- 1.3.6 These figures are consistent with those cited by NatCen on behalf of CITB (Ref. 1.2) in the Survey of Employment by Occupation in the Construction Industry 2016. That report identifies that female construction workers are much more likely to be in non-manual roles (97.4% – up from 88.4% of all female construction workers in 2010), with only 2.6% of female construction workers working in manual roles. Looking at both genders in the construction workforce female workers make up 34.5% of the non-manual workforce (up from 24% in 2010).
- 1.3.7 A comparison with 2001 Census data shows that the UK's construction workforce is ageing, and there has been a proportional increase in women working in the sector (up 54% since 2001, compared to 25% growth in male construction workers). Women currently make up 11% of the construction workforce - but some construction bodies forecast that this could more than double by 2020 (Ref. 1.3).
- c) **Industry, qualifications and skill level**
- 1.3.8 Based on analysis of the Inter-Departmental Business Register by CITB (Ref. 1.2), around two thirds of the UK construction workforce are in manual occupations (up from less than 50% in 2010), of which the largest group is 'building services' (19.9% – up from 11% in 2010).
- d) **Disability & health**
- 1.3.9 There are a number of definitions of long-term limiting health and disability, which means that there is no single source of data for identifying benchmarks in the construction industry.
- 1.3.10 The Labour Force Survey (now the Annual Population Survey) uses a definition from the Equality Act 2010, and asked whether people have a health problem, or disability that limited their day to day activities or the paid work they could do, including whether they were classified as disabled under the Equality Act 2010.

- 1.3.11 The most recent data (2017/18) is not specific to the construction industry, but suggests that 20% of working-age people in the UK are either Equality Act 2010 core disabled<sup>1</sup> or work-limiting disabled, compared to 9.3% of the construction workforce (Labour Force Survey, ONS, 2017).
- 1.3.12 Other sources have identified lower proportions, for example:
- Construction Industry Council (2016), A Blueprint for Change (Ref. 1.4). This report found that 4.8% of construction industry workers in the UK declared a disability, a lower proportion than the UK generally.
  - Construction Industry Council (2009) (Ref. 1.5), Gathering and Reviewing Data on Diversity within the Construction Industry. This report identified a range of from 8 to 15% of the construction workforce, across UK regions, with some form of disability.
  - London Development Agency/Mayor of London (2007) (Ref. 1.6), The Construction Industry in London and Diversity of Performance. From the 2001 Census, this report identified 6.6% of employees in manual construction trades in London as people with limiting long-term illnesses.
  - Olympics Delivery Authority (2010) (Ref. 1.7), Employment and Skills Update. This bulletin identified a project target benchmark of 3% of workforce from people with disabilities, but in the published figures for September 2010 the project only achieved 1.2% despite considerable efforts to achieve the benchmark.
- 1.3.13 Overall, there are significant differences between employment rates for people with disabilities (50%), compared to those without (80%) (Ref. 1.8) across all sectors, although in the construction industry, a report commissioned by the Equality and Human Rights Commission (Ref. 1.8) suggests that underemployment of ‘fit for work’ disabled people in the construction sector is lower (at 14%) than all sectors combined (50%).
- 1.3.14 Given the diversity of definitions it would not be appropriate, on this basis, to identify a benchmark of construction workers with disabilities for Sizewell C. SZC Co. and its contractors and sub-contractors, would ensure that they meet the requirements of the Disability Discrimination Act 2004 (Ref. 1.9), and the Equality Act 2010 to ensure that disabled people are

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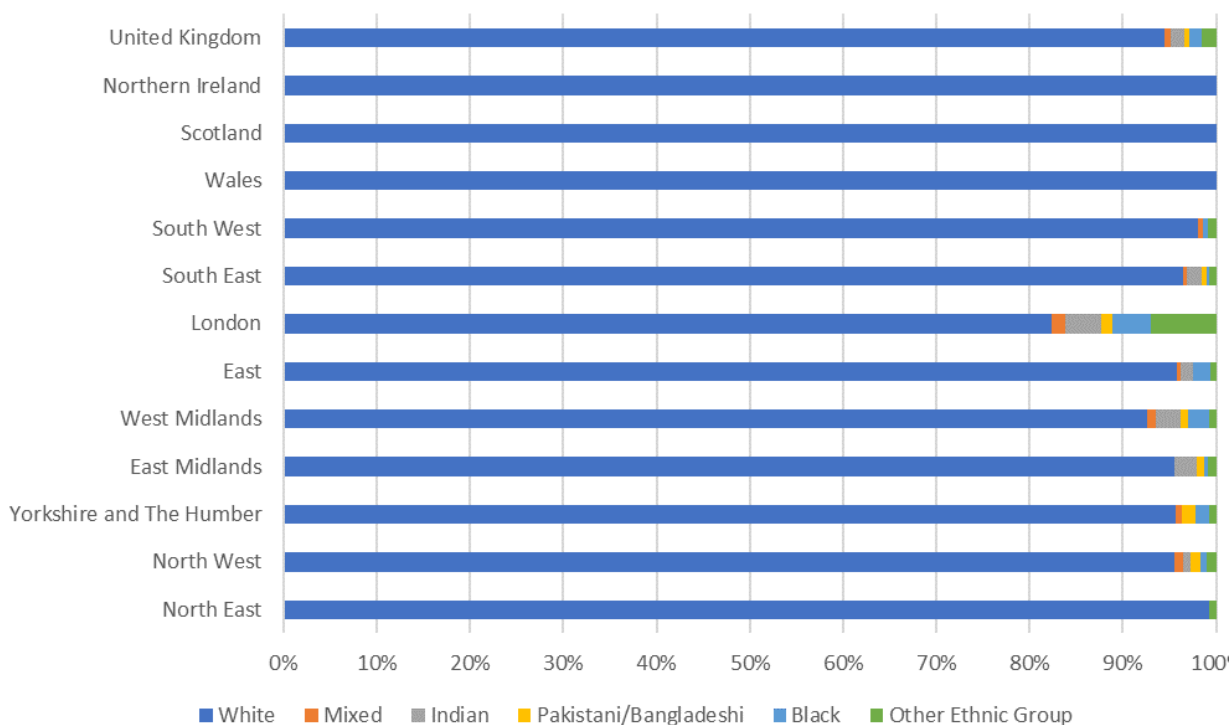
<sup>1</sup> Without prejudice to the generality of the definition of disability, the Equalities Act 2010 considers that there are six core areas of disability: mental health conditions, learning disabilities, hearing loss, visual impairment, mobility impairment and disfigurement.

treated equally. This will be formalised within the application for development consent as required by law.

e) Ethnicity and nationality

1.3.15 **Plate 1.5** below shows the ethnic breakdown of the construction workforce in the UK. This shows that the workforce is 94% white in the UK, rising to almost 100% in Wales and Northern Ireland (sample survey with 95% confidence interval). London is the only significant outlier with just under a fifth of its construction workforce being from black and minority ethnic communities.

**Plate 1.5: Ethnic group of employed construction workers (Annual Population Survey, ONS 2018).**



1.3.16 This predominantly white workforce contains within it a range of nationalities, although the workforce remains dominated by British nationals.

1.3.17 **Table 1.1** shows the proportion of the UK construction workforce that was non-migrant (i.e. UK nationals) and migrant (foreign nationals) in 2011. This shows a predominance of British nationals, standing at 85% of the overall construction workforce in the UK, compared to 83% of the overall workforce (any sector).

1.3.18 A further 9% of the UK’s construction workforce do not hold a passport, and are therefore assumed to be British nationals (96% of people without a passport in the 2011 Census were born in the UK). Of the remaining “migrant” workers around 16% are from countries that joined the European Union between 2001–2011, sometimes called the “Accession Nations”.

**Table 1.1: UK workforce and construction workforce; migrant/non-migrant (rounded) (Census, ONS, 2011).**

Country of Birth.	% Construction Workforce.	% All Workforce.
United Kingdom.	85%	83%
Other Europe.	6%	5%
Africa	0%	1%
Middle East and Asia.	1%	2%
The Americas and the Caribbean.	0%	1%
Antarctica, Oceania and other.	0%	0%
No passport.	9%	8%

1.3.19 It would not be appropriate to set a benchmark for ethnicity, or nationality of the Sizewell C workforce. All workers at Sizewell C would have a legal right to work in the UK, and all workers would be covered by UK employment law. It should be noted that construction is a naturally itinerant industry with workers moving to where the work is available.

1.3.20 At Stage 2 Consultation, SZC Co. was specifically asked about the extent of migrant labour likely to work on the Sizewell C Project. In the light of Brexit and potential future limitations on labour flows, especially from the EU, CITB has worked with IFF Research and the Institute of Employment Research at the University of Warwick on a comprehensive study of the role of non-UK workers in construction (Ref. 1.10). Key findings include:

- One in six employers said they were very, or quite dependant on international migrants.
- Non-UK workers cover a range of occupations including labourers, architects, skilled trades, construction directors/managers/supervisors, machine operatives, engineers, quantity surveyors and support roles.
- The migrant workforce is younger with a significantly higher proportion aged 25 to 34.

- By broad occupational group, non-UK workers were more likely than UK workers to be in skilled construction and building trades (49% versus 39%), and in elementary trades and related occupations, which includes roles such as labourers, hod carriers and groundworkers (10% versus 7%).
- SZC Co. is working with the local authorities and other agencies both to maximise jobs for Suffolk residents, and to ensure that arrangements are put in place to manage the impacts of the entire NHB workforce.

#### f) Families and dependants

- 1.3.21 It is assumed that some NHB construction workers joining the Sizewell C Project for medium and long-term roles may choose to bring family members to the area with them. However, there is little monitoring data that can be transposed to support a likely scale.
- 1.3.22 During the construction of Sizewell B power station in the 1990s, construction workers who moved to the area with others (i.e. didn't move alone) each brought an average of 1.2 non-construction worker adults, and 0.85 children to the area (Ref. 1.11).
- 1.3.23 Other more recent assessments for similar projects identify a much lower rate. For example, the forthcoming Wylfa Newydd Project in Anglesey applies % – based family rates per occupation, leading to an estimate of around 0.03 dependants per worker.
- 1.3.24 Survey evidence from Hinkley Point C suggests that the number of children workers bring with them is likely to be much lower than at Sizewell B, reflective of a modern construction workforce. Monitoring from Hinkley Point C (2019 – ahead of peak) suggests that:
- 2.3% of workers brought pre-school children (aged 0–3) with them, at a rate of 1.4 children per worker.
  - 1.9% of workers had brought primary school-aged (4–10) children with them, at a rate of 1.7 children per worker.
  - 0.4% of workers had brought secondary school-aged children with them, at a rate of 1.4 children per worker.
- 1.3.25 Applied to the estimated NHB workforce at the peak of construction of Sizewell C – this suggests there could be up to:



- 180 pre-school-aged children;
- 190 primary school-aged children; and
- 33 secondary school-aged children.

1.3.26 There is no direct monitoring data for the number of non-dependant adults that workers have brought with them at Hinkley Point C.

1.3.27 However, Hinkley Point C monitoring data asks an overarching question “have you brought your family with you” – with results suggesting that overall, 13% of workers surveyed identified that they had brought their family with them.

1.3.28 These figures represent a pre-peak workforce at Hinkley Point C, and do not reflect full campus occupancy anticipated at peak.

1.3.29 If it is anticipated that 13% of NHB workers at Sizewell C also bring families (not discounting for those occupying accommodation where families are not allowed i.e. campus and caravan site), this would equate to around 765 ‘families’ (13% of 5,884 workers).

1.3.30 Hinkley Point C monitoring suggests that the majority of NHB workers who have brought children have bought homes in the area or are renting without another home address elsewhere. As such, for the purposes of the socio-economic assessment, the distribution of workers with children is assumed to follow the spatial distribution of NHB workers in the owner-occupied sector set out in **Appendix 9C** of this volume, and to reflect the proportions of dependants occurring at Hinkley Point C.

#### g) Other relevant characteristics

1.3.31 The following list considers other population, demographic, housing and economic characteristics from the 2011 Census (ONS, 2011) that are a consideration when assessing the potential effects of Sizewell C’s NHB construction workforce on housing, public services and community facilities and in designing appropriate mitigation:

- 94% of UK construction workers are proficient in English, compared to 92% for all sectors.
- In terms of tenure, construction workers in the UK are less likely to own property, and more likely to rent than average (68% of

**NOT PROTECTIVELY MARKED**

construction workers own a property and 20% rent, compared to 74% and 16% respectively for all sectors):

- Approximately 1 in 10 construction workers live in social rented homes, the same as for all industries.
- The likelihood of renting is far greater in younger construction workers than younger people in all employment sectors – 28% of construction workers aged under 50 rent, compared to 21% of all people.
- The faith profile of construction workers in the UK is similar to that of the UK's population on average, with 60% considering themselves Christian, and around 30% with no religion/faith. There are small differences in the representation of other religions, with Muslim and Hindu religions slightly under-represented in the construction workforce compared to the UK average.
- In terms of highest level of qualification, construction workers are slightly more likely to have no qualifications than average (13% compared to 10%). They are far more likely to rely on an apprenticeship (around 1 in 5 construction workers have an apprenticeship as their highest level of qualification, compared to 1 in 10 on average). Construction workers are less likely to have degree-level qualifications than average (17% of construction workers have a degree, compared to 35% of all people in employment).
- The UK construction industry has a very different structure from other sectors in terms of economic activity, with 42% of the sector self-employed compared to 15% on average. The sector also has far lower rates of part-time working – 14% compared to 29% of all people in employment in the UK.
- The UK construction industry, given the nature of the work, has a very different occupational skills profile to other sectors. The proportion of management and professional roles in construction is around half that of the UK average for all sectors, though the construction industry has a heavy reliance on other skilled trades (53% of workers in this category compared to 12% on average). The proportion of lower skilled jobs - process, elementary type roles – is less for the construction industry than the average across all sectors.

## References

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VOLUME 2, CHAPTER 9, APPENDIX 9C: WORKFORCE SPATIAL  
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## Contents

1.	Technical Note 3 – Workforce Spatial Distribution.....	1
1.1	Introduction.....	1
1.2	The Gravity Model .....	1
1.3	Spatial distribution .....	5

## Tables

Table 1.1:	Workforce accommodation assumptions for socio-economic assessment. ....	4
Table 1.2:	Distribution of home-based workers at peak construction, by ward and local authority within the CDCZ.....	5
Table 1.3:	Distribution of non-home-based workers at peak construction, by accommodation sector by ward and local authority within the 60-minute area. ....	7

## Plates

**None provided**

## Figures

Figure 9C.1: Study areas (60-minute Area, Construction Daily Commuting Zone (CDCZ) and Local Authority Areas)

## 1. Technical Note 3 – Workforce Spatial Distribution

### 1.1 Introduction

1.1.1 This note sets out the principles and assumptions for the spatial distribution of the peak construction workforce for the Sizewell C Project, which – alongside accommodation assumptions and workforce profile assumptions – forms the key project assumptions on which the socio-economic assessment is based.

1.1.2 This note draws on information in:

- appendices to the **Transport Assessment (TA)** (Doc Ref. 8.5) regarding the mechanics and transport principles of the Gravity Model;
- **Appendix 9A** – to determine the overall peak workforce to be distributed, and the breakdown of home-based (HB), and non-home-based (NHB) workers; and
- **Appendix 9D** – to determine the assumptions around which accommodation sectors the NHB workforce is likely to occupy at peak.

### 1.2 The Gravity Model

1.2.1 The spatial distribution of the workforce is estimated using a Gravity Model.

1.2.2 The Gravity Model is an estimate of the residential location of both HB workers and NHB workers at peak construction, excluding those NHB workers resident in SZC Co. provided campus or caravan site accommodation. The peak of construction is modelled in order to capture the period of greater potential effect on traffic, and socio-economic factors e.g. accommodation and public services.

#### a) Background and development

1.2.3 An initial Gravity Model for peak construction of the Sizewell C Project was produced before Stage 1 consultation, and shared with Suffolk County Council (SCC). Comments on the model were received from SCC and SCC's transport consultants AECOM. SZC Co. responded to these comments in a June 2013 paper 'Response to SCC & AECOM Gravity Model Reviews' which was provided to the socio-economic workshop held on 17 September 2013. This response included a commitment to update the initial Gravity Model in the light of 2011 Census information, and any other relevant updated sources of information (e.g. on accommodation sources).

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1.2.4 The initial Gravity Model was subsequently updated based on the proposals contained in the relevant paper submitted to a December 2013 socio-economics workshop, and has been used as an input to traffic modelling, and to inform wider strategies for transport, accommodation and other socio-economic effects. In 2019, additional workshops were undertaken between SCC, and SZC Co. in order to update the model to account for a peak of 7,900 workers.

b) **Core workforce assumptions**

1.2.5 The Gravity Model distributes workers across the following workforce role/type categories at peak.

i. **Home-based workforce**

1.2.6 The HB workforce includes:

- Construction operatives and management i.e. residents from throughout the construction daily commuting zone (CDCZ) with specific construction skills, mainly within a 90-minute commuting area, but with a small proportion beyond this. The sub-sectors of managers and construction workers is set out in **Appendix 9A**.
- Site service workers drawn from a tighter catchment area of 45 minutes.
- Around 600 associated development staff, predominantly those working in the accommodation campus. Many of these roles will be of a shift, or part-time nature. These roles are included within the Gravity Model to ensure that any associated traffic impacts are captured, and as with the site services workers, these are assumed to be HB roles drawn from within a 45-minute commuting zone, but not restricted to residents with construction skills (i.e. drawn from the total available working age population).

1.2.7 The Gravity Model categorises the HB workforce as follows:

- Unconstrained HB workers – these are workers who would be recruited to mainly construction roles on the Sizewell C Project. Most of these workers are assumed to travel up to 90-minutes to the site (though it is acknowledged that some will travel further), and so this portion of the workforce is assumed to be drawn from the existing population CDCZ.
- Site services HB workers – these are workers who would be recruited to work mainly in non-construction roles on the Sizewell C Project. As such, they are considered more likely to live more locally to the main

development site, within 45-minutes, so this portion of the workforce is assumed to be drawn from the existing population CDCZ, but limited to 45-minutes from the main development site.

- Associated development HB workers – these are workers who would be recruited to mainly service sector roles on the associated development sites for the Sizewell C Project.

ii. **Non-home-based workforce**

1.2.8 The NHB workforce includes:

- construction workers estimated to take up accommodation in the private rented sector (PRS) within 60 minutes of the site;
- construction workers estimated to take up accommodation in the tourist sector within 60 minutes of the site;
- longer-term construction workers estimated to take up accommodation in the owner-occupied sector within 60 minutes of the site; and
- operational staff at peak construction, who will either be recruited from the local area or who will move permanently to the area (SZC Co. requires operational staff to live within 25 miles of site).

1.2.9 Residents of the Sizewell C Project campus and caravan site do not form part of the Gravity Model, but the number assumed to be in campus accommodation affects the residual number of NHB workers using other accommodation sectors.

1.2.10 For NHB workers not living in the accommodation campus or caravan site:

- A commuting time of up to 60 minutes has been assumed. This is consistent with experience from Sizewell B, and reflects the consideration that workers moving into the area to work on the Sizewell C Project will naturally seek accommodation closer to site.
- Residential distribution within the Gravity Model has been informed by the availability and affordability of accommodation sources as set out in **Appendix 9D**.

1.2.11 The Gravity Model categorises the NHB workforce as follows:

- NHB workers in tourist accommodation – these workers are NHB, so are assumed to move from their home address temporarily, to tourist accommodation within 60-minutes travel time to the main development site.



- NHB workers in private rented accommodation - these workers are NHB, so are assumed to move from their home address temporarily, to private rented accommodation within 60 minutes travel time to the main development site.
- NHB workers in owner-occupied accommodation (construction) – these workers are NHB, so are assumed to move from their home address to temporarily (though medium-long-term) occupy owner-occupied accommodation within 60 minutes travel time to the main development site.
- Operational workers in owner-occupied accommodation – these workers are assumed to move from their home address to owner-occupied accommodation within 60 minutes travel time to the main development site, or to be drawn from the existing labour market.

1.2.12 As set out in **Volume 2, Chapter 9** of the **Environmental Statement (ES)** (Doc Ref. 6.3), the level of HB recruitment drives the overall number of NHB workers, and the breakdown by accommodation type.

1.2.13 The key parameters that inform the distribution for the Gravity Model (based on sectors identified above) are set out in **Table 1.1**.

**Table 1.1: Workforce accommodation assumptions for socio-economic assessment.**

Worker Type/Accommodation Sector.	Workers
Total workforce.	7,900 (+600 AD).
HB (construction).	2,016
HB (associated development).	600
NHB (accommodation campus).	2,400
NHB (caravan site).	600
NHB (private rented).	1,200
NHB (tourist).	802
NHB (owner-occupied – construction).	649
NHB (operational).	233

c) **Transport assumptions**

1.2.14 Transport assumptions within the Gravity Model – including journey time, park and ride information, and the distance decay function are set out in appendices to the **TA**.

### 1.3 Spatial distribution

1.3.1 This section describes the spatial distribution of workers, by sector, resulting from the Gravity Model core assumptions.

1.3.2 The Gravity Model distributes construction workers by ward. A number of different spatial scales/constraints have been used. These are defined in **Figure 9C.1**.

1.3.3 For the purposes of presentation, the former Suffolk Coastal District Council (SCDC), and Waveney District Council (WDC) have been identified as separate local authority areas in the following tables, as these are administrative geographies that are aligned to the 2011 Census ward areas used by the Gravity Model. Overall totals for the new East Suffolk district area can be calculated by adding totals for SCDC and WDC, should this distinction be required.

1.3.4 **Table 1.2** sets out the distribution of HB workers at peak construction, by ward (showing only areas with more than 10 workers) and local authority (all) within the CDCZ.

**Table 1.2: Distribution of home-based workers at peak construction, by ward and local authority within the CDCZ.**

Ward/Local Authority.	Local Authority.	HB Workers.		
		Unconstrained HB.	Associated Development Staff HB.	Site Services HB.
<b>Wards</b>				
Leiston	SCDC	123	81	40
Saxmundham	SCDC	37	35	18
Aldeburgh	SCDC	27	28	14
Rendlesham	SCDC	24	19	9
Halesworth	WDC	21	16	8
Kesgrave East.	SCDC	20	17	8
Snape	SCDC	15	13	6
Melton and Ufford.	SCDC	15	15	7
Carlton Colville.	WDC	14	11	6
Yoxford	SCDC	13	14	7
Framlingham	SCDC	12	12	6
Westgate	Ipswich	11	0	0
Kessingland	WDC	11	10	5

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Ward/Local Authority.	Local Authority.	HB Workers.		
		Unconstrained HB.	Associated Development Staff HB.	Site Services HB.
Stowmarket North.	Mid Suffolk.	11	0	0
Pakefield	WDC	11	10	5
St John's.	Ipswich	11	0	0
Beccles South.	WDC	11	8	4
Walberswick and Wenhaston.	SCDC	10	9	5
Priory Heath.	Ipswich	10	0	0
Alexandra	Ipswich	10	0	0
Harbour	WDC	10	9	4
Kirkley	WDC	10	8	4
Orford and Tunstall.	SCDC	10	9	5
Bridge	Ipswich	10	0	0
Whitton	WDC	10	9	4
Bungay	WDC	10	7	4
Holywells	Ipswich	10	0	0
<b>Local authorities.</b>				
SCDC		436	346	173
WDC		197	167	83
Ipswich		131	8	4
South Norfolk.		106	31	16
Mid Suffolk.		103	28	14
Tendring		85	0	0
Great Yarmouth.		81	0	0
Broadland		68	0	0
Norwich		67	0	0
Babergh		55	0	0
Colchester		53	0	0
St Edmundsbury.		46	0	0
Breckland		41	0	0
Braintree		31	0	0
Forest Heath.		27	0	0
Chelmsford		19	0	0

Ward/Local Authority.	Local Authority.	HB Workers.		
		Unconstrained HB.	Associated Development Staff HB.	Site Services HB.
North Norfolk.		15	0	0
East Cambridgeshire.		10	0	0
Maldon		10	0	0

1.3.5 **Table 1.3** sets out the distribution of NHB workers at peak construction, by ward (showing wards with more than 10 construction workers), and local authority within the 60-minute area.

**Table 1.3: Distribution of non-home-based workers at peak construction, by accommodation sector by ward and local authority within the 60-minute area.**

Ward/Local Authority.	Local Authority.	NHB Workers.		
		NHB – Tourist.	NHB – PRS.	NHB – Owner-Occupied <sup>1</sup> .
<b>Wards</b>				
SCDC	Aldeburgh	462	105	26
SCDC	Leiston	135	392	55
SCDC	Yoxford	73	40	10
SCDC	Saxmundham	55	87	21
SCDC	Snape	21	31	8
SCDC	Walberswick and Wenhaston.	16	15	6
WDC	Southwold and Reydon.	13	10	5
SCDC	Orford and Tunstall.	8	24	5
WDC	Kessingland	5	7	3
SCDC	Hollesley with Eyke.	2	9	3
SCDC	Wickham Market.	2	9	4
SCDC	Peasenhall	2	7	3
WDC	Blything	1	6	3
SCDC	Framlingham	1	16	5

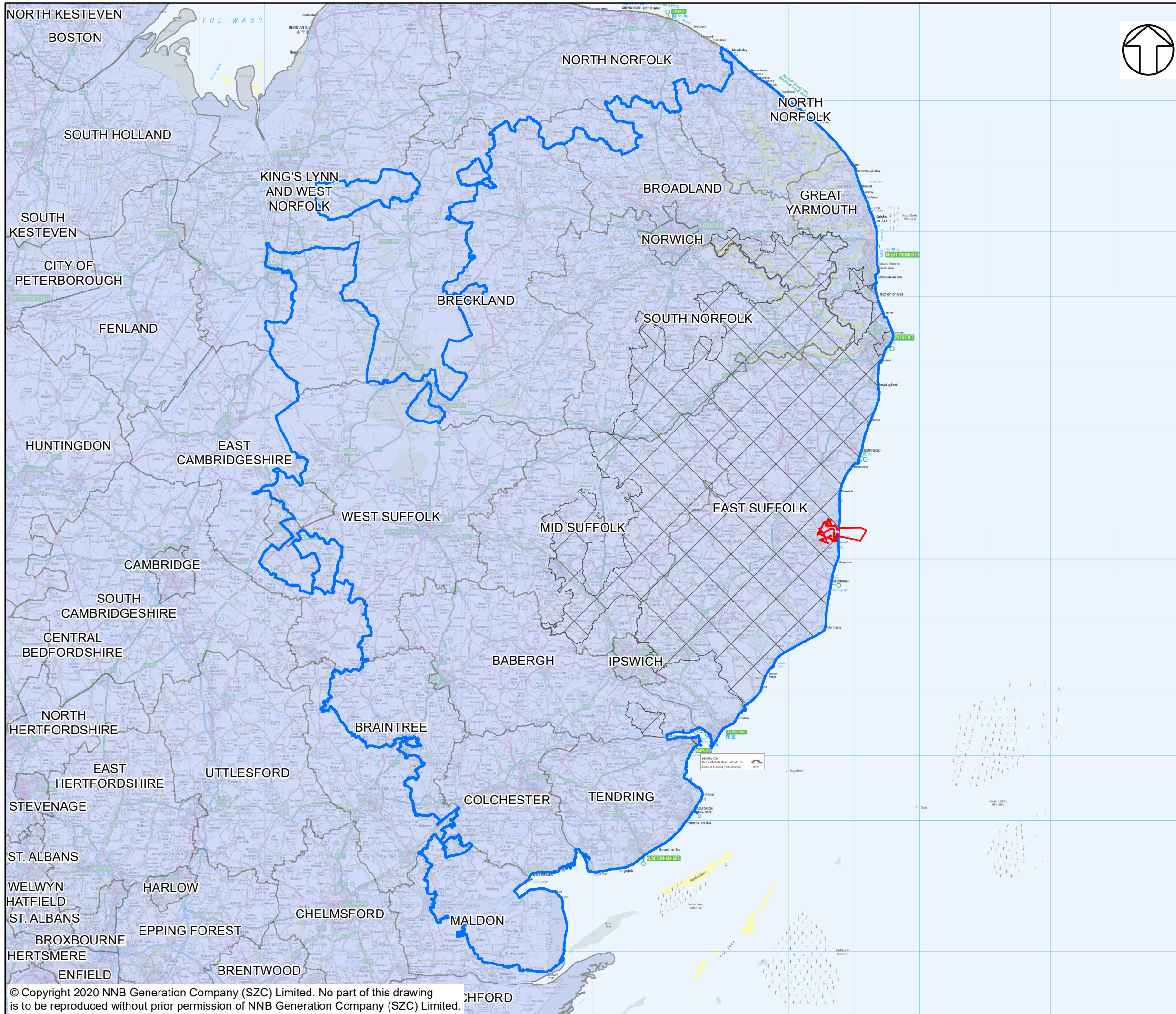
<sup>1</sup> Includes future operational workforce

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Ward/Local Authority.	Local Authority.	NHB Workers.		
		NHB – Tourist.	NHB – PRS.	NHB – Owner-Occupied1.
SCDC	Hacheston	1	11	3
SCDC	Melton and Ufford.	1	16	7
SCDC	Rendlesham	1	54	8
WDC	Halesworth	1	26	7
WDC	Wrentham	0	8	2
SCDC	Seckford	0	11	2
SCDC	Earl Soham.	0	6	3
SCDC	Sutton	0	18	3
<b>Local authorities.</b>				
SCDC		781	909	583
WDC		20	139	148
Mid Suffolk.		0	37	46
Great Yarmouth.		0	19	18
South Norfolk.		0	28	32
Babergh		0	12	15
Ipswich		0	56	40



VOLUME 2, CHAPTER 9, APPENDIX 9C: WORKFORCE SPATIAL  
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**NOTES**

**KEY**

- SIZEWELL C MAIN DEVELOPMENT SITE BOUNDARY
- - - DEMARCATION LINE
- 60 MINUTE TRAVEL ZONE
- CONSTRUCTION DAILY COMMUTING ZONE
- LOCAL AUTHORITY DISTRICTS

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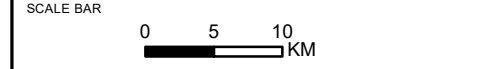


**DOCUMENT:**  
 SIZEWELL C ENVIRONMENTAL STATEMENT  
 VOLUME 2  
 APPENDIX 9C  
 WORKFORCE SPATIAL DISTRIBUTION

**DRAWING TITLE:**  
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 FIGURE 9C.1

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VOLUME 2, CHAPTER 9, APPENDIX 9D: ACCOMMODATION DATASETS AND ASSUMPTIONS



## Contents

1	Technical Note 4 – Accommodation Datasets and Assumptions.....	1
1.1	Introduction.....	1
1.2	Estimated accommodation supply .....	1
1.3	Workforce accommodation assumptions.....	13
	References .....	17

## Tables

Table 1.1:	Bed spaces in tourist accommodation (VEA Data, 2012). .....	4
Table 1.2:	Bed spaces in tourist sector accommodation (Visit Britain data, 2016). .....	5
Table 1.3:	Bed spaces in tourist accommodation (VEA data, 2012, detailed geography).....	6
Table 1.4:	Homes and bedrooms in the private rented sector based on 2011 Census data..	8
Table 1.5:	Median rent / week for single room in shared house (Valuation Office Agency local Housing allowance list of rents (Category A accommodation) by Broad Rental Market Area, May 2019). .....	11
Table 1.6:	Homes and rooms in family-size (3+ bedroom) owner-occupied homes. ....	11
Table 1.7:	Estimated unoccupied bedrooms by tenure based on occupancy rate.....	12
Table 1.8:	Workforce accommodation assumptions for socio-economic assessment. ....	16

## Plates

None provided

## Figures

None provided

## 1 Technical Note 4 – Accommodation Datasets and Assumptions

### 1.1 Introduction

#### a) Accommodation datasets

1.1.1 This technical note outlines the data and processes used to define the accommodation baseline/inputs for the Sizewell C Gravity Model. It highlights the approach to estimating current levels of stock, and affordability for Sizewell C construction workers of accommodation in the private rented, tourist and owner-occupied sectors, and how these are applied to the spatial distribution of workers via the Gravity Model.

#### b) Accommodation assumptions

1.1.2 This technical note also sets out the underlying datasets for the size, location, and sector of the accommodation that Sizewell C construction workers could choose and afford.

### 1.2 Estimated accommodation supply

1.2.1 SZC Co. has developed a Gravity Model to estimate the locations of Sizewell C workers – both home-based (HB) (drawn from the existing labour market within approximately 90 minutes from the main development site known as the construction daily commuting zone (CDCZ)) and non-home-based workers (NHB) (those likely to move from outside the area to within approximately 60 minutes from the main development site).

1.2.2 The precise location that NHB workers choose to live would be dependent on a number of factors, including their duration of stay, the price of accommodation, access to their permanent homes, proximity to park and ride facilities and the Sizewell C site (via car or direct buses), and access to amenities such as sport and leisure and, in the case of families, schools.

1.2.3 Based on typical travel times for construction workers in the east of England region, the Gravity Model assumes that people already living in the local area would be willing to travel up to (and some beyond) around 90 minutes each way in order to work at Sizewell C.

1.2.4 Where workers are moving to the local area in order to work on the Sizewell C Project, it is assumed that they would want to live closer to the site. Therefore a 60-minute zone, which is supported by Sizewell B experience (Ref. 1.1), has been used to assess the availability of local accommodation to NHB workers.

- 1.2.5 For modelling purposes, where relevant, travel times include changeover / waiting times at the park-and-ride sites.
- 1.2.6 For NHB workers, the model has two elements – a weighting based on the amount of accommodation in the area, and one based on the distance from the site, that is:
- the more accommodation there is in an area the more workers are assumed to live there; and
  - the shorter the travel time to the site, the more workers are assumed to live there.
- 1.2.7 This means workers are estimated to cluster in more urban areas (where there is more accommodation), especially those with quicker access to the site. As a result, relatively few NHB workers would be located towards the extremities of the 60-minute zone, especially those which are rural areas with relatively little accommodation.
- 1.2.8 SZC Co.'s socio-economic consultants have examined in detail the scope for existing accommodation in Suffolk to meet the additional demand created by the Sizewell C Project. This has involved careful consideration of the potential scale of accommodation available in three sectors:
- tourist accommodation;
  - private rented sector (PRS); and
  - owner occupied sector.
- 1.2.9 No data has been collected on latent accommodation (i.e. accommodation that is either new or not currently counted within the PRS and tourist databases and could, for instance, include renting out a spare room).
- 1.2.10 SZC Co. has not yet started to ascertain interest in latent accommodation provision for Sizewell C, and latent accommodation is therefore not being estimated at this stage. Latent accommodation is likely to be a mix of unidentified private rented, including rooms in owner-occupied housing, and un-rated tourist accommodation.
- 1.2.11 At Sizewell B and Hinkley Point C, the construction workforce has made extensive use of latent accommodation. In both cases, bed spaces came forward predominantly in areas with more private rented sector, and tourist accommodation. Therefore, while latent bed spaces would add to the

amount of accommodation available, there is no reason to suggest this would materially affect the spatial distribution of the workforce estimated by the Gravity Model.

1.2.12 The remainder of this section sets out how much accommodation of each type is expected to be available across the 60-minute zone.

a) **Tourist accommodation**

1.2.13 There is a large supply of tourist sector accommodation across the 60-minute area, most of which is concentrated in urban areas or within coastal areas. The stock of accommodation in the area is diverse in terms of the type of service provided and the price per night/booking.

1.2.14 The accommodation data management company for the East of England Tourist Board (now Visit East Anglia), issued a database of all the tourist accommodation registered with the tourist board in July 2012. This database provides estimates of the number of bed spaces in different types of tourist accommodation at postcode level across the region, and has provided the foundation for establishing the quantum of tourist accommodation across the area.

1.2.15 This data allows mapping of accommodation at a very local scale, though it is noted that the data is now eight years old, and may not include all accommodation in the tourist sector (for example, if providers were not registered with Visit East Anglia at the time).

1.2.16 Further research into caravan accommodation, affordability and availability has also been undertaken to supplement this database.

1.2.17 The database provides estimates of the number of bed spaces in different types of tourist accommodation at postcode level across the East of England. This data was used to establish the distribution of bed spaces in serviced (B&B, Hotels etc.), and self-catering accommodation.

1.2.18 The database also included details on caravan parks including the number of units and bed spaces. The caravan data included some anomalies between the number of units and bed spaces at some caravan parks; for example, caravan parks with no units or bed spaces or caravan parks with many units with few or no bed spaces. These anomalies could be due to differences in the way caravan accommodation providers registered their provision of units and bed spaces with the tourist board, as some providers offer static caravans and some provide caravan pitches to rent, or a mixture of both.

1.2.19 In order to understand the anomalies within the database, SZC Co. undertook a telephone survey of the 28 caravan accommodation providers in the four districts included within the database. Information on the number of static caravans available for rent, the bed spaces within those static caravans, and the total number of caravan pitches was requested from each provider. It was estimated that there would be two bed spaces per caravan pitch. A total of 19 providers responded to the survey, of which one had closed down. Three providers did not want to participate in the survey and six did not respond.

1.2.20 **Table 1.1** below sets out the stock of tourist accommodation (by bedroom) using the VEA dataset.

**Table 1.1: Bed spaces in tourist accommodation (VEA Data, 2012).**

	Total	Serviced	Non-serviced		
		Hotels and Similar.	Self-catering	Caravan and Campsites.	Other e.g. Holiday Parks, Hostels.
<b>Local wards.</b>					
Leiston	333	29	9	295	
Saxmundham	423	29	79	315	
Snape	411	15	151	45	200
Yoxford	605	131	197	277	
Aldeburgh	1,691	341	806	544	
<b>Districts</b>					
Great Yarmouth.	19,003	3,752	380	4,916	9,955
South Norfolk.	1,533	949	332	176	76
East Suffolk.	19,670	2,526	3,644	4,151	9,350
Suffolk Coastal*.	10,057	1,287	2,225	2,266	4,279
Waveney*.	9,613	1,239	1,419	1,885	5,071
Mid Suffolk.	1,393	800	393	200	
Ipswich	986	986			
Babergh	1,550	1,167	350	33	
<b>Other scales.</b>					
60-minute area.	26,276	6,255	4,300	5,645	10,076

Source: Visit East Anglia, 2012.

1.2.21 On this basis, there are 26,276 tourist bed spaces within the 60-minute zone.

1.2.22 Data is also produced at a local authority scale by Visit Britain (Ref. 1.2) as part of their Accommodation Stock Audit (2016). While this cannot be used to inform the Gravity Model (which requires local-level data to run), it provides some context for the wider stock by sector. **Table 1.2** below summarises the overall stock by sector (bed spaces) for Suffolk (county) and East Suffolk (district).

**Table 1.2: Bed spaces in tourist sector accommodation (Visit Britain data, 2016).**

	Total	Serviced	Non-serviced		
		Hotels and Similar.	Holiday Dwellings.	Tourist Campsites.	Other Collective Accommodation.
East Suffolk (district).	11,005	4,168	4,262	2,512	63
Suffolk (county).	20,620	12,233	5,302	2,989	96

i. **Affordability / availability**

1.2.23 Room occupancy rates for tourist accommodation are produced monthly by Visit England at a regional scale through the England Occupancy Survey (Ref. 1.3). A review of this information for the east of England region from 2016–2019 suggests occupancy ranges from 63% in the winter (January) to 85% in the peak of summer (July/August). Occupancy tends to exceed 80% for four to five months of the year.

1.2.24 Applied to the above datasets, this suggests that:

- There may be between 1,600 (peak) up to 7,300 (off peak) unoccupied bed spaces in East Suffolk district depending on the data sources and assumptions set out above.
- There may be between 3,100 (peak) and 9,700 (off peak) unoccupied bed spaces in the 60-minute area depending on the data sources and assumptions set out above.

1.2.25 The Suffolk Coast Tourism Strategy (2013–23) (Ref. 1.4) notes that the average (2012) bed space occupancy may be lower than this, ranging from 40% per annum for hostels through to 58% for hotels, self-catering accommodation and camping and caravan sites.

1.2.26 SZC Co. has developed area-wide assumptions on the range of availability and affordability of accommodation for construction workers, to identify indicative effects on capacity based on the price of accommodation, and the accommodation allowance available to NHB workers under the

Construction Industry Joint Council Working Rule Agreement (£40.76 per night at time of assessment) (Ref. 1.5).

1.2.27 These indicate that a significant amount of tourist accommodation would not be affordable to Sizewell C construction workers. By sector, SZC Co. has assumed that:

- 85% of serviced accommodation would not be affordable for workers.
- In most areas, 90% of self-catering accommodation would be affordable to workers (though SZC Co. note through engagement with The Suffolk Coast Destination Management Organisation that there is likely to be considerable local variation in price between areas).
- While all caravan accommodation is likely to be affordable, planning restrictions for the year-round use of caravans for construction workers reduces the potential for availability – engagement with local authorities suggests this could reduce availability to workers by 50%.

1.2.28 **Table 1.3** applies these discounts to the overall stock identified in **Table 1.1**, with the effect of reducing the overall stock that is anticipated to be available and affordable to workers by over 60%.

**Table 1.3: Bed spaces in tourist accommodation (VEA data, 2012, detailed geography).**

Geography	Total	Serviced	Non-serviced		
		Hotels and Similar.	Self-catering	Caravan and Campsites.	Other e.g. Holiday Parks, Hostels.
<b>Local wards.</b>					
Leiston	160	4	8	148	
Saxmundham	233	4	71	158	
Snape	161	2	136	23	
Yoxford	335	20	177	139	
Aldeburgh	1,049	51	725	272	
<b>Districts</b>					
Great Yarmouth.	3,363	563	342	2,458	
South Norfolk.	529	142	299	88	
East Suffolk.	5,734	379	3,280	2,076	
Suffolk Coastal*.	3,329	193	2,003	1,133	

Geography	Total	Serviced	Non-serviced		
		Hotels and Similar.	Self-catering	Caravan and Campsites.	Other e.g. Holiday Parks, Hostels.
Waveney*	2,405	186	1,277	943	
Mid Suffolk.	574	120	354	100	
Ipswich	148	148			
Babergh	507	175	315	17	
<b>Other scales.</b>					
60-minute area.	7,631	938	3,870	2,823	

Source: Visit East Anglia, 2012.

1.2.29 This shows that a significant proportion of tourist accommodation would be affordable to Sizewell C construction workers. Only hotels and some self-catering accommodation in the peak of the season would not be affordable.

1.2.30 In the summer peak a significant number of these spaces would normally be occupied by tourists, and displacing them might have wider adverse impacts. However, accommodation providers may prefer to let their space to Sizewell C workers, so it is not possible to forecast the extent to which supply might be limited in the peak tourist season by “normal” levels of tourist occupancy. Additionally, the supply of tourist accommodation assessed as available and affordable to Sizewell C construction workers is a subset of the total rated accommodation in the area (approximately 15% of all tourist bed spaces in the 60-minute area).

1.2.31 The figures outlined in the tables above currently do not include “Holiday Parks”, or “Holiday Villages”, given a level of ambiguity over their function, operation and restrictions on use. It has been noted that some of these facilities may be suitable for construction workers (and were used during the construction of Sizewell B), and may form an additional part of the accommodation supply in practice. The Gravity Model excludes these in order to take a conservative approach to supply.

b) Private rented sector

1.2.32 There is a substantial quantity of PRS housing within the 60-minute zone. The 2011 Census identifies that there are over 99,000 private rented bedrooms in the 60-minute area, within 42,000 homes. The distribution of these bed spaces across the area varies substantially, with a greater proportion (of all bed spaces) in urban areas.



1.2.33 **Table 1.4** below sets out the total number of private rented bed spaces within the 60-minute area and East Suffolk District as at the 2011 Census.

**Table 1.4: Homes and bedrooms in the private rented sector based on 2011 Census data<sup>1</sup>.**

Geography	Total Homes.	Total Rooms.
<b>Local wards.</b>		
Leiston	478	1,124
Saxmundham	289	728
Snape	132	351
Yoxford	132	326
Aldeburgh	216	543
<b>Districts</b>		
Great Yarmouth.	7,605	17,101
South Norfolk.	6,752	16,752
East Suffolk.	16,295	38,755
Suffolk Coastal*.	8,065	19,723
Waveney*	8,230	19,032
Mid Suffolk.	5,157	12,930
Ipswich	12,092	26,732
Babergh	5,451	13,405
<b>Other scales.</b>		
60 minute area.	42,030	99,033

Source: Census, 2011.

1.2.34 The distribution of PRS homes is weighted towards urban areas where there are more homes and population generally.

1.2.35 The PRS has changed substantially since census data was collected in 2010/11. Although there is no detailed local-scale data to update the census, trends may be estimated from a number of sources including:

- the English Housing Survey (Ref. 1.6) – which estimates that in the east of England, the PRS has grown by approximately 30% since the 2011 Census – now making up around 18.2% of all homes (compared to 14.7% in 2011); and

<sup>1</sup> LC4405EW - Tenure by household size by number of bedrooms

- the Ipswich Housing Market Area Strategic Housing Market Assessment Volume 2 (2017) (Ref. 1.7) – which states that the PRS accounts for 18.1% of overall stock in the housing market area in 2018 (Table 4.2a).

1.2.36 As such, by applying the increases evidenced above from the English Housing Survey and Strategic Housing Market Assessment, it is reasonable to assume that the 2011 Census underestimates the stock of PRS homes and rooms across East Suffolk, and the 60-minute area by up to 11,600 and 29,700 bedrooms respectively.

i. Vacancy

1.2.37 The Ipswich Housing Market Area Strategic Housing Market Assessment Update (2019) states that the vacancy rate in Suffolk Coastal is around 8.3%. This is defined using 2011 Census data for homes that are empty, and those that are used as second homes. A vacancy rate of 6.9% is presented for Waveney within the Ipswich and Waveney Housing Market Areas Strategic Housing Market Assessment Volume 2 (2017).

1.2.38 However, there is a significant difference between tenures especially where the market requires a certain level of vacancy to operate efficiently. Average (national) vacancy rates in the PRS over the last ten years, as recorded by the English Housing Survey, suggest vacancy rates of around 10.3% – this includes properties that are empty or available to let, or away from the market for the short, medium, or long-term.

ii. Turnover / churn

1.2.39 Using English Housing Survey data, and census data on PRS turnover at ward-level, some parameters can be established.

1.2.40 Data from the 2011 Census identifies that, across all tenures in the former Suffolk Coastal District Council area:

- Around 1,700 new households moved into the District in that year.
- Around 1,300 households moved out of the area.
- Around 2,100 households already in the District moved to a new home elsewhere in the District.

- 1.2.41 For the former Waveney District Council area, the same data shows:
- Around 1,100 new households moved into the District in that year.
  - Around 800 households moved out of the area.
  - Around 2,400 households already in the District moved to a new home elsewhere in the District.
- 1.2.42 This is of course influenced by the type of accommodation households occupy, with significant differences between the owner-occupied, social rented and PRSs.
- 1.2.43 The English Housing Survey sets out that average annual churn rate in the PRS (households moving within, in or out of the sector in a given year) averages at 31.8% over the last ten years in England. This equates to 2.7% of all properties turning over in each month.
- 1.2.44 Evidence from the 2011 Census<sup>2</sup> indicates an annual churn of around 29% of private rented households in Suffolk Coastal, and 27% in Waveney (those households in the Districts in the PRS who moved in the last year), which appears about average for districts in the UK.
- 1.2.45 In Suffolk Coastal, around 8.2% of PRS households moved into dwellings in the District in 2011, and in Waveney around 6% of PRS households moved into dwellings in the District in 2011.
- 1.2.46 Average turnover of the PRS in East Suffolk wards in 2011 (Census) was around 35% (or 2.8% per month).
- 1.2.47 These figures show that the PRS market is functioning well in terms of offering a mix of short and long-term residence and there is therefore likely to be available accommodation to Sizewell C workers when they arrive.
- iii. [Affordability / availability](#)
- 1.2.48 As with tourist accommodation, affordability is a key question. **Table 1.5** shows that PRS accommodation is affordable across the district.

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<sup>2</sup> This data only refers to 'wholly moving households' i.e. one where all members of the household have moved from the same address. A partly moving household is where one or more members of the household have moved in the last year but not all members have moved from the same address. Partly moving households in the PRS sector accounted for an additional 8.7% of all PRS households. Overall, 4.4% of all households in Suffolk Coastal were formed in 2011 as a result of partially moving. These are additional to wholly moving households.

**Table 1.5: Median rent / week for single room in shared house (Valuation Office Agency local Housing allowance list of rents (Category A accommodation) by Broad Rental Market Area, May 2019).**

Broad Rental Market Area.	Median Rent per Week – Single Room in Shared Accommodation.
Ipswich	£80.55
Lowestoft & Great Yarmouth.	£79.50
Colchester	£76.99
Bury St Edmunds.	£82.85
Central Norfolk & Norwich.	£82.85

1.2.49 There is unlikely to be a price constraint on workers (given their ability to spend well in excess of local housing allowance rates), and given the churn in the market, workers would be able to access the sector, even if other people are also seeking accommodation.

c) Owner occupied sector

1.2.50 The 2011 Census identifies that there were 134,427 family homes (3+ bedrooms) in the owner-occupied sector across the 60-minute area in 2011. Since then the private housing sector has grown by approximately 4% in Suffolk, so this is considered an under-estimate.

1.2.51 **Table 1.6** sets out the total number of family-size (3+ bedroom) owner-occupied homes in the 2011 (Census) across the relevant study areas.

**Table 1.6: Homes and rooms in family-size (3+ bedroom) owner-occupied homes.**

Geography	Total Homes.
<b>Local wards.</b>	
Leiston	1,339
Saxmundham	1,107
Snape	518
Yoxford	520
Aldeburgh	952
<b>Districts</b>	
Great Yarmouth.	18,719
South Norfolk.	31,191

Geography	Total Homes.
East Suffolk.	55,858
Suffolk Coastal*.	30,240
Waveney*	25,618
Mid Suffolk.	23,527
Ipswich	25,869
Babergh	20,968
<b>Other scales.</b>	
60-minute area.	134,427

Source: Census, 2011.

d) Latent sector

1.2.52 Latent accommodation includes ‘un-rated’ tourist accommodation, rooms for let in private homes, currently empty homes, and accommodation new to the market each year.

1.2.53 Based on 2011 Census data for occupancy rating (using a conservative assessment – considering that any home with a ‘+2’ occupancy rating has at least one spare bedroom), there were over 1,000 spare bedrooms in Leiston alone. **Table 1.7** sets out the number of empty bedrooms across the study areas in 2011 by tenure (2011 Census).

**Table 1.7: Estimated unoccupied bedrooms by tenure based on occupancy rate.**

Geography	Owner-occupied (bedrooms).	Social rented (bedrooms).	Private rented (bedrooms).
<b>Local wards.</b>			
Leiston	830	37	81
Saxmundham	875	81	109
Snape	865	51	80
Yoxford	407	20	51
Aldeburgh	445	11	42
<b>Districts</b>			
Great Yarmouth.	11,967	760	1,030
South Norfolk.	22,228	594	1,787
East Suffolk.	39,745	1,550	3,407
Suffolk Coastal*.	22,372	678	1,929

Geography	Owner-occupied (bedrooms).	Social rented (bedrooms).	Private rented (bedrooms).
Waveney*	17,373	872	1,478
Mid Suffolk.	16,622	488	1,373
Ipswich	15,735	1,467	1,693
Babergh	15,100	629	1,304

Source: Census, 2011.

**1.2.54** The Ministry for Housing, Communities and Local Government Live Table 615 identifies that (as at October 2018) there are 3,257 vacant properties in East Suffolk (the former Suffolk Coastal and Waveney Districts). Of these, 1,130 are ‘long-term’ vacants – meaning that these dwellings have been unoccupied and substantially unfurnished for over six months.

**1.2.55** Waveney has 73 local authority-owned vacant properties, and across East Suffolk there are 56 general needs vacant properties owned by private registered providers.

### 1.3 Workforce accommodation assumptions

**1.3.1** Through public consultation feedback and experience of other projects (such as Sizewell B and Hinkley Point C), SZC Co. have set out, tested, and established expectations about the types of accommodation that construction workers may seek to use during the construction phase.

**1.3.2** During the construction phase, NHB workers would seek temporary accommodation in the area across a range of types/sectors depending on their roles, skill level and tenure on the Sizewell C Project.

**1.3.3** The following types of accommodation are likely to be used by workers:

- Temporary on-site accommodation campus: through the development of the Sizewell C Project, SZC Co. has tested and refined options for a campus which would accommodate 2,400 workers, in order to attract a high-quality workforce while balancing potential effects on accommodation markets and the local economy.
- Temporary caravan site: through the development of the Sizewell C Project, SZC Co. has defined and consulted on the provision of a bespoke caravan site for construction workers on the land to the east of Eastlands Industrial Estate in Leiston. This would accommodate 400 caravans, which would help to provide resilience for the workforce at the peak of construction and reduce effects on other

accommodation sectors. Workers are likely to share caravans in some cases, at an overall average of one and a half workers per caravan.

- SZC Co. has worked with East Suffolk Council to examine the issues around its delivery, operation, and management, as a sustainable way to provide flexibility as part of the balanced **Accommodation Strategy** (Doc Ref. 8.10).
- Private rented accommodation: throughout the construction phase some workers who are in short-medium term roles would seek private rented accommodation, predominantly in smaller 1–2 bed properties and in some cases houses in multiple occupation.
- Feedback from activity at Hinkley Point C has suggested that more workers are likely to look for accommodation in the private rented sector than the tourist sector – this is also likely to be the case at Sizewell C, given the location, and affordability/availability of tourist accommodation in the area.
- Tourist accommodation: serviced, self-catering, and caravan accommodation is likely to be used by some construction workers in shorter-term roles on the Sizewell C Project. These offer the workers some flexibility in tenure, but there is a range of availability and affordability in this sector in Suffolk that needs to be considered.
- Owner-occupied accommodation: some workers would buy homes in the area, if they are on longer-term, management and high-skilled roles, or part of the operational (permanent) workforce which would start to build up before the peak of construction.
- Latent accommodation: there is a significant amount of accommodation in spare rooms across all tenures, and in currently un-rated tourist accommodation.
- While it is not possible to fully identify and model the extent of this sector, experience from elsewhere suggests that some workers would use this sector for short periods of time instead of the tourist or private rented sectors.
- The types of accommodation that the NHB workforce would seek to live in would depend on factors, such as the nature of their role on the Sizewell C Project including their skill level, income and length of contract, which varies considerably between roles.

- 1.3.4 For management and professional staff, and operational staff (some of who would be on-site during the peak of construction), there would be a higher propensity to buy property in the local area. These roles are typically higher paid and longer-term, so people may choose to move their families to the area. However, this element forms a relatively small portion of the workforce.
- 1.3.5 The majority of workers would be either in civil construction roles, or mechanical and electrical operatives. These roles are more likely to be shorter-term and transient, with skills required for specific packages within the build meaning contracts may last from a few months to a few years. As such, these workers would be more likely to move to the area for shorter periods, requiring greater flexibility of accommodation, and would be more likely to return to their permanent homes between working periods/shift cycles than bring their families and settle permanently.
- 1.3.6 The estimated split between types of accommodation sought at peak is based on experience at Sizewell B, and more recent monitoring information from Hinkley Point C, combined with estimates about the types of roles by skill, contract type and earnings. It is also influenced by the Sizewell C Project's provision of accommodation in terms of the on-site campus and caravan site.
- 1.3.7 At the peak of construction, SZC Co. predicts that:
- Project accommodation – the accommodation campus and caravan site – could accommodate up to 3,000 workers at full capacity (assuming one and a half workers per caravan).
  - 649 long-term construction workers – likely to be management and professional roles – would be anticipated to have bought homes and live in owner-occupied sector property<sup>3</sup>.
  - A further 233 workers at peak would have moved to the area to take up operational roles, and are likely to have bought homes and live in owner-occupied sector property.
  - 802 workers would be living in accommodation in the tourist sector – predominantly caravans and self-catering accommodation relatively close to the site (depending on cost and availability).

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<sup>3</sup> With this range depending on the Sizewell C Project's overall level of local recruitment at peak (which affects the residual demand for non-home-based work force by accommodation type).



- 1,200 workers would have secured PRS tenancies (similar to levels of private renting during the peak of Sizewell B).

1.3.8 The assessment does not include any assumed uptake of latent accommodation by NHB workers so, as a result, the above numbers are considered to be conservative.

1.3.9 **Table 1.8** summarises the above expectations for how many workers may use accommodation per sector at peak.

**Table 1.8: Workforce accommodation assumptions for socio-economic assessment.**

Worker Type/Accommodation Sector.	Workers
Total workforce.	7,900 (+600 AD)
HB (construction).	2,016
HB (associated development).	600
NHB (accommodation campus).	2,400
NHB (caravan site).	600
NHB (private rented).	1,200
NHB (tourist).	802
NHB (owner occupied – construction).	649
NHB (operational).	233

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VOLUME 2, CHAPTER 9, APPENDIX 9E: SPORT AND LEISURE AUDIT AND ESTIMATED DEMAND

## Contents

1.	Technical Note 5 – Sport and Leisure Audit and Estimated Demand .....	1
1.1	Introduction .....	1
1.2	Methodology .....	1
1.3	Baseline (audit) and local authority published studies .....	9
1.4	Estimated additional demand from Sizewell C workforce .....	17
1.5	Mitigation proposals.....	22
	References .....	24
	Annex 9E.1 Local Sports Facilities Audit .....	25

## Tables

Table 1.1:	Suffolk Coastal District Council playing pitch assessment: identified future balance between supply and demand for pitches and non-pitch facilities.....	11
Table 1.2:	Suffolk Coastal District Council playing pitch assessment: identified future balance between supply and demand for pitches and non-pitch facilities.....	12
Table 1.3:	Waveney District Council playing pitch assessment: identified future balance between supply and demand for pitches and non-pitch facilities. ....	13
Table 1.4:	Suffolk Coastal District Council playing pitch assessment: identified future balance between supply and demand for pitches and non-pitch facilities.....	14
Table 1.5:	Suffolk Coastal District Council built facilities: identified need. ....	15
Table 1.6:	Suffolk Coastal District Council built facilities: identified future need. ....	16
Table 1.7:	Potential sports facilities demand arising from the non-home-based workforce. ....	19
Table 1.8:	Potential sports facilities demand arising from the non-home-based workforce. ....	20

## Plates

Plate 1.1:	Age and gender breakdown in the construction sector (Census 2001 and 2011)..	3
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## Figures

**None provided**

## 1. Technical Note 5 – Sport and Leisure Audit and Estimated Demand

### 1.1 Introduction

1.1.1 SZC Co. needs to understand the type of sports and leisure facilities the temporary Sizewell C construction workers would require, the extent to which these are already provided in areas where workers are expected to live, and estimated net demand (quantum).

1.1.2 The assessment covers the 60-minute drive time from the site, within which the temporary non-home-based (NHB) workforce are expected to live during the construction of the Sizewell C Project. It includes:

- A baseline of the likely demographics, and characteristics of the NHB workforce, to inform an assessment of the likely type of sports facilities they would require.
- An audit of existing provision of sports facilities within a 60-minute drive time from the Sizewell C site to identify facilities that may be available to the NHB workforce, which includes a list of facilities by type and features.
- A summary of East Suffolk Council's (ESC) published technical assessments (referenced throughout) for requirements for playing pitches and built facilities to assess existing levels of provision.
- An assessment of the estimated likely demand (usage) of facilities by the NHB temporary construction workforce across the 60-minute drive area based on:
  - Sport England methodology (sports facilities calculator); and
  - modelled demand levels in ESC's assessments.

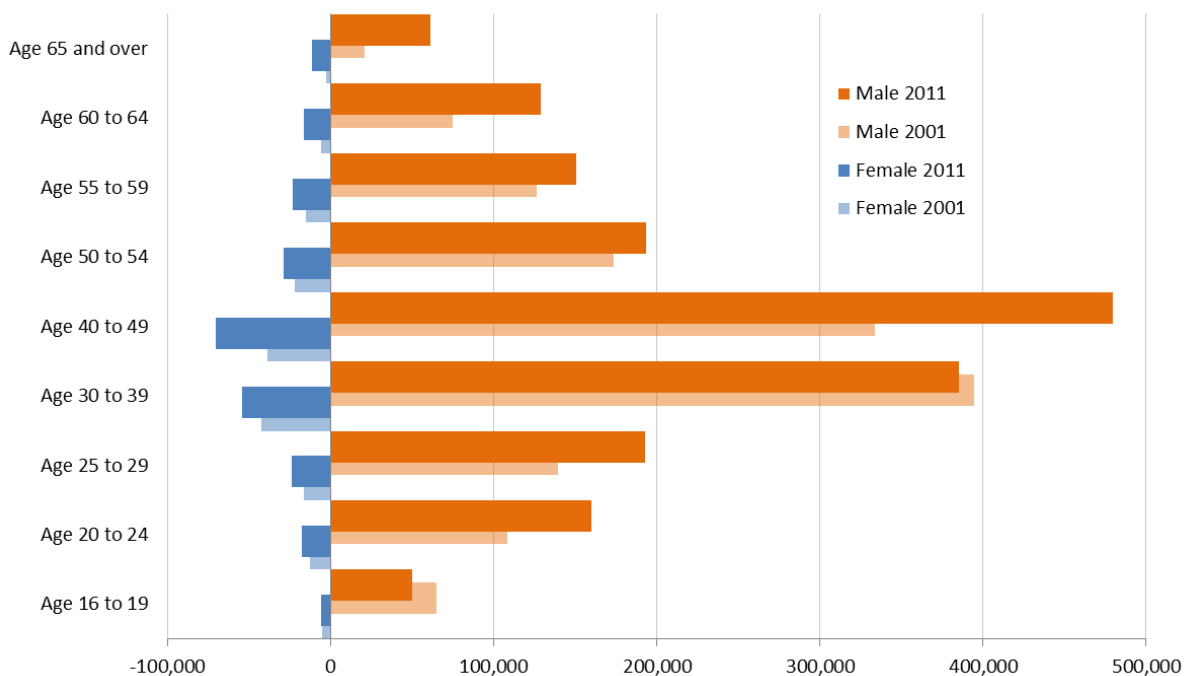
1.1.3 This approach was informed by meetings and reviews with ESC officers, and commercial operation partners.

### 1.2 Methodology

1.2.1 SZC Co. has worked with the local authorities to develop an evidence base for assessing the likely impacts of the Sizewell C Project, including the demand for sports and leisure facilities which arises from the proposed temporary increase in population as a result of the construction phase (i.e. the number of NHB workers) in certain locations across the 60-minute area.

- 1.2.2 This has involved the production of a series of “Technical Notes”, which set out the overall workforce profile, and demographic breakdown of the workforce, assumptions about the accommodation they would be living in, and their spatial distribution.
- a) [Workforce profile and NHB workforce](#)
- 1.2.3 Overall, the Sizewell C construction workforce is expected to peak at up to 7,900 workers, of which 5,884 workers are expected to be NHB (i.e. temporarily moving to the area and therefore causing a temporary increase in demand for sports and leisure facilities). The size and make-up of the workforce would vary over the construction phase.
- 1.2.4 Full details of the workforce profile are contained in **Appendix 9A** of this volume.
- b) [Demographic benchmarks and workforce characteristics](#)
- i. [Sizewell C’s construction workforce](#)
- 1.2.5 Analysis has been undertaken using publicly-available datasets from the 2011 Census (ONS, 2011), and other industry published material to benchmark the anticipated age and gender profile and other characteristics (where data is available) of construction workers in England and the east of England in particular.
- 1.2.6 **Plate 1.1** sets out the construction sector age and gender benchmark in 2011 (Census – compared to 2001 data) that has been applied to the total NHB workforce at peak.

**Plate 1.1: Age and gender breakdown in the construction sector (Census 2001 and 2011).**



1.2.7 The most represented group in the construction industry are men aged 25–49, accounting for 63% of all workers. Women make up around 10% of the industry, and are fairly evenly distributed across age ranges.

1.2.8 Full details of the demographic characteristics of the workforce are contained in **Appendix 9B** of this volume.

1.2.9 A small proportion of NHB workers may bring families with them temporarily – most likely those workers seeking owner-occupied accommodation with relatively long contracts on the Sizewell C Project. It is anticipated that at peak there could be up to around 200 children and 375 non-dependent children/other adults in addition to the workforce. As these additional people would likely be living in owner-occupied accommodation, they are not considered to be net additional and will contribute to sports and leisure supply via general taxation.

ii. **Sport England market segmentation typologies**

1.2.10 Sport England, in partnership with Experian, has developed a market segmentation model to analyse the sport and leisure behaviour of England’s residents based on age, gender, life situation and socio-economic characteristics. Each segment is assigned a named representative person, who embodies the key characteristics of the group.

1.2.11 The approach builds on the results of Sport England's Active People Surveys, the Department of Culture, Media and Sport's Taking Part survey, and the Mosaic tool from Experian to identify nineteen sporting segments.

1.2.12 Using this data, and the demographics of the construction workforce referred to above, predictions as to what the sports and leisure requirements of construction workers at Sizewell C may be over the course of the Sizewell C Project, and at the peak of construction, may be made.

1.2.13 Local authorities also use this market segmentation and demographic approach to identify the types of facilities required by the resident population.

#### “Jamie”

1.2.14 Male operative construction workers in their teens and twenties would make up approximately 25–30% of the workforce on average. Sport England identifies this group as “Jamie”. Jamie is:

- under the age of 35;
- educated to below degree level, most likely in a vocational qualification; and
- likely to be working class.

1.2.15 60% of this group do 30 minutes of sport at least once a week (compared to a national average of 40%), and 31% do so at least three times a week (compared to an average of only 15%).

1.2.16 The most popular sports for this group are football (28%), and keep fit/gym (22%). Around 30% are members of teams or clubs, and 24% take part in competitions. This reflects the fact that amongst the most commonly cited reasons for doing sport amongst this group are: ‘to meet with friends’ and ‘just to enjoy it.’ Improving personal performance and keeping fit are also important, but losing weight is not a consideration.

1.2.17 The group is hampered in their access to sport because they left school, have no opportunity to take part, or because of economic and work reasons. Work commitments are a concern for 27% of this group, compared to only 19% in the general population.

#### “Kev”

1.2.18 Male operative construction workers in their 30s and 40s are expected to make up approximately 40% of the workforce. Sport England identifies this group as “Kev”. Kev is:



- between the ages of 25 and 56, but is most likely to be 36–45;
  - likely to work in a vocational job; and
  - likely to be working class.
- 1.2.19 42% of this group take part in sport at least once a week, and 17% do so at least three times a week. The most popular sports in this group are going to the gym or keep fit (14%); football (11%) and cycling (11%). They also swim and take part in athletics. 33% take part in organised sport, but only 16% take part in competitions.
- 1.2.20 The group mostly take part in sport ‘just to enjoy it’, but also consider keeping fit to be important. Work commitments are the most likely factor to prevent the group from doing as much sport as they would like to. ‘Being less busy’ is the most commonly cited factor that would increase uptake.
- 1.2.21 The group’s satisfaction levels with their overall access to sports provision are broadly in line with the general population. They are especially dissatisfied by the quality of facilities and coaching. They are less satisfied with their levels of fitness than average.
- 1.2.22 The group are not that likely to take part in much leisure outside the home. 57% go shopping, and 54% go to restaurants, but these proportions are both less than in the general population. They are less likely than other groups to visit the theatre, library or museums.
- “Terry”
- 1.2.23 Male operative construction workers in their 50s and older would be expected to make up approximately 23% of the workforce. This group are represented by “Terry” who is:
- aged 46–65;
  - likely to be working class, or living at subsistence level;
  - works or did work as a manual labourer; and
  - suffers relatively high levels of deprivation (according to the Government’s Index of Multiple Deprivation (ONS, 2019) (IMD 2019)) than other groups, especially with health and disability.
- 1.2.24 25% of this group play sport at least once a week, but only 8% do so three times a week or more. 70% did no sport at all in the four weeks prior to the survey. The group are most likely to go to the gym (8%), or go cycling or swimming (6% each), but these levels are significantly lower than in the wider population.

1.2.25 17% of the group are members of a club, but only 4% play team sports. Like their younger counterparts, the group's main motivation for taking part in sport is enjoyment, followed by the desire to keep fit. The group is most hampered by their injuries and disabilities, with 59% citing this as a reason for not doing as much sport as they would like. 17% of the group would do more sport if they had someone to go with.

1.2.26 The group are less likely than average to take part in leisure activities in general. Outside the home, 56% go shopping, 55% go on days out and 41% go to bars or pubs. The group is one of the least likely to visit libraries, museums or the theatre.

#### “Paula”

1.2.27 Female operative construction workers (approximately 12% of the workforce) are likely to be in the “Paula” market segment. Paula is:

- aged 18–45, but most commonly between 25 and 36;
- likely to be a single mother; and
- likely to be in low skilled or part time work.

1.2.28 36% of this group take part in sport at least once a week, and 12% do so at least three times a week. However, 63% did not do sport at all in the four weeks prior to the survey. They are unlikely to be members of a club or to compete. The most popular activities in this group are going to the gym (18%) and swimming (17%).

1.2.29 This group take part in sport because they enjoy it, (21%), to keep fit (26%) and to take their children (21%). The most important reason for not doing as much sport as they would like is family commitments, which affects this group far more than the average. Factors such as leaving school, lack of opportunities, and economic and work reasons are also important.

1.2.30 The group is slightly more satisfied with overall sports provision than the average. However, they have below average satisfaction with the ‘social aspects’ of the sports experience, such as feeling comfortable in the sports environment, taking part without feeling embarrassed or awkward, and having their cultural and religious beliefs respected. They are also slightly less satisfied than average with the ‘ease of participation’ which takes into account issues such as transport access, and balancing leisure time with work and family commitments.

1.2.31 36% of this group would do more sport if they were less busy, and 33% would do so if admission prices were cheaper. Admission prices are more important for this group than for any other of the market segments.

1.2.32 This group goes shopping for leisure more often than average, with 85% going shopping in their spare time. 59% go on days out and 57% go to restaurants. In the last 12 months, this group were least likely to have been to the theatre or to a museum, but were much more likely than their male counterparts to have been to a library.

“Ben, Tim and Phillip”

1.2.33 Male workers above operative skill level are likely to make up approximately 8% of the workforce. Those working above operative level, in administrative, or in managerial positions who are educated to degree level or above are likely to be in the “Ben” (18–25); “Tim” (25–45) and “Phillip” (46+) market segments, according to their age.

1.2.34 These segments play more sport than any others in their respective age groups, with 68% of Bens, doing sport at least once a week, 62% of Tims, and 51% of Phillips.

1.2.35 Football and going to the gym are significant sports for all age groups, but cycling and swimming are increasingly important in the older groups. All groups would like to increase their uptake of swimming and cycling. Participation in football declines from 33% in the 18–24 group to 9% in the 46+ group. However, it is suggested that the older men are likely to continue to be connected to football in club administration capacities, such as club secretary, and 30% retain club membership, so football remains important socially.

1.2.36 Work commitments are the main reason that these segments do not do as much sport as they like, with more than 30% in each age group with this concern. All groups are least satisfied with the quality of facilities and coaching on offer.

1.2.37 The younger groups are most likely to go out to pubs, bars or clubs or to the cinema. As they get older, pubs and bars are replaced by restaurants, and days out become more important. ‘Tim’ is the most likely to go to museums and galleries (62%) or to the theatre (57%). Participation amongst Bens and Philips is slightly lower. These groups are less likely than others in their age groups to visit libraries.

“Chloe and Jackie”

1.2.38 Female workers above operative level are likely to make up approximately 1% of the workforce. This small group is likely to be represented by “Chloe” (mainly early 20s) and “Jackie” (late 20s+). Chloe is more likely than other women in her age group to do sport at least once a week, with 62% doing so. However, participation for Jackies’ is lower, at 49%, mostly due to the pressures of having a family. These groups are most likely to swim, or go to

the gym, and they would like to do more of both. Jackie's would benefit much more than average from help with childcare.

- 1.2.39 Younger women are slightly more likely than average to go to museums, galleries, libraries, or the theatre, whilst the older group are slightly less likely than average to do so. Shopping is an important pastime for both groups, whilst eating in restaurants and going to pubs are more popular pastimes for younger women.

iii. [Market segmentation – summary](#)

- 1.2.40 For the demographic of NHB workers, football and going to the gym are by far the most important sports requiring facilities.

- 1.2.41 The vast majority of workers would be “Jamies” and “Kevs” for whom football and the gym are the main activities, along with cycling which is undertaken by 11% of Kevs.

- 1.2.42 There is very limited demand for swimming and racquet sports barely feature in the demand profiles

c) [Spatial distribution of the workforce and accommodation provision](#)

- 1.2.43 The spatial distribution of the NHB workforce is described in full in **Appendix 9C** of this volume.

- 1.2.44 At peak, it is anticipated that the NHB workforce would be distributed across the 60-minute area, with concentrations in areas east of the A12, and in areas with more accommodation (for example Aldeburgh (mainly in tourist accommodation) and Leiston (mainly in private rented accommodation)).

- 1.2.45 The Sizewell C Project would provide accommodation for a portion of the workforce at an on-site accommodation campus, and a caravan site with capacity for up to 2,400 and 600 workers respectively.

- 1.2.46 The distribution would be influenced by factors including the occupancy level of Sizewell C Project accommodation and the overall number of NHB workers throughout the construction phase, and at the peak.

### 1.3 Baseline (audit) and local authority published studies

#### a) Local authority assessments<sup>1</sup>

1.3.1 SZC Co. has sought to fully understand the technical assessments that have underpinned East Suffolk’s Leisure Strategy (2014–2024) (Ref. 1.1). These technical assessments comprise:

- Suffolk Coastal District Council (SCDC) Playing Pitch and Non-Pitch Facilities Assessments (Nov 2014) (Ref. 1.2);
- SCDC Built Facilities Assessment (Nov 2014) (Ref. 1.3);
- Waveney District Council (WDC) Playing Pitch and Outdoor Sports Facilities Assessment (July 2014) (Ref. 1.4); and
- Suffolk County Sports Facilities Strategy 2009-2016 (May 2009) (Ref. 1.5).

1.3.2 These areas cover the majority of the 60-minute travel area for NHB workers.

1.3.3 The scope of East Suffolk’s Leisure Strategy 2014–2024 is to report on community views, and technical assessments undertaken to identify the opportunities available to the district’s leisure development, and operational partners in considering future development of physical activity opportunities in local communities. The intention is to promote health and well-being for all residents.

1.3.4 The strategy recognises that physical activity is essential to a healthy lifestyle, and targets people who are currently inactive with the aim of increasing activity monitored by Sport England’s Active People Survey (Ref. 1.6). It recognises that, in terms of demographics, the age profile is predominantly higher than regional and national averages.

1.3.5 The strategy aims to increase access and availability of leisure and recreation opportunities to the wider community, and enhance and communicate the current and future offer to meet the needs of local communities.

1.3.6 A number of high-level recommendations have been made under the headings “Sports”, “Health and Wellbeing” and “Facilities”. Key recommendations and actions include:

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<sup>1</sup> Former local authority areas of Suffolk Coastal and Waveney Districts are referred to in this section where policy / evidence base pre-dates their merger to ESC.

- Support and implement the recommendations and actions of the Suffolk Coastal Leisure Needs Analysis, Playing Pitch and Non-Pitch Facilities Assessment and Built Facilities Assessment.
- Introduce further sporting and physical activity opportunities for disabled and older residents.
- Improve internal and external communications, raising public awareness of the wide number and range of physical activity opportunities that already exist.
- Where possible, increase the accessibility and affordability of sites and facilities.
- Working with leisure partners, utilise and publicise the vast amount of quality community centres across the district enabling more physical activity opportunities in rural communities.

**1.3.7** SCDC's Playing Pitch and Non-Pitch Facilities Assessment (2014) aims to identify the existing provision of pitches and outdoor sports facilities to identify areas of deficiency, review existing local standards of access to, and quality of provision, and recommend opportunities, and solutions, for the provision, protection, and improvement of facilities including the use of shared facilities.

**1.3.8** A number of key socio-economic characteristics of SCDC's population are highlighted that affect the demand for provision. These include:

- The population has an older age profile than national average.
- The population is forecast to grow by 5.9% by 2027 – although there is a projected decrease of 18.2% in people aged over 50.
- An estimated 19% of the population is affected by some form of disability.
- Good health and generally low deprivation prevail, although there are significant variations at the local level.

**1.3.9** In terms of sport in SCDC, the assessment identifies that participation rates are well above the national and regional levels, sports club membership rates are comparatively high, and market segmentation data suggests that there is a relatively large proportion of residents who traditionally favour football, cricket and bowls.

**1.3.10** The assessment takes an audit of existing provision by type, size and quality of facility, calculates per-capita provision, and identifies the level of population within 15 minutes' drive, cycle and walk of facilities.

1.3.11 It then makes a district-wide assessment of the balance between supply and demand using Sport England’s site-specific playing pitch methodology to identify current need/surplus.

1.3.12 In order to identify future demand for pitches by sport, the assessment identifies the age range using each type of facility, the projected growth in this age range up to 2021, and the ‘Team Generation Rate’:

**Table 1.1: Suffolk Coastal District Council playing pitch assessment: identified future balance between supply and demand for pitches and non-pitch facilities.**

Sport	Age	Population (2013).	Teams (2013).	Team Generation Rate.	Population (2021).	Teams (2021).	Change
Adult male football.	17–45	16,200	70	1:231	15,600	68	-2
Adult female football.	17–45	16,100	1	1:16,100	15,600	1	No change.
Boys youth football.	10–16	5,200	99	1:53	4,900	92	-7
Girls youth football.	10–16	5,000	6	1:833	4,900	6	No change.
Mini-soccer (mixed).	6–9	5,200	73	1:71	4,800	68	-5
Adult male cricket.	16–55	28,500	32	1:891	24,800	28	-4
Adult female cricket.	16–55	28,400	3	1:9,467	24,800	3	No change.
Boys junior cricket.	10–15	4,600	33	1:139	4,200	30	-3
Girls’ junior cricket.	10–15	4,400	6	1:733	4,200	6	No change.
Adult male rugby.	19–45	17,300	14	1:1,236	14,900	12	-2
Adult female rugby.	19–45	17,100	1	1:17,100	14,900	1	No change.
Boys junior rugby.	13–18	4,500	17	1:265	4,200	16	-1
Girls’ junior rugby.	13–18	4,400	1	1:4,400	4,200	1	No change.
Mini-rugby (mixed).	7–12	8,400	27	1:311	7,800	25	-2
Adult male hockey.	18–45	15,800	13	1:1,215	15,400	13	No change.

Sport	Age	Population (2013).	Teams (2013).	Team Generation Rate.	Population (2021).	Teams (2021).	Change
Adult female hockey.	18–45	15,700	13	1:1,208	15,400	13	No change.
Boys junior hockey.	8–17	7,300	8	1:913	6,800	7	-1
Girls' junior hockey.	8–17	7,200	11	1:655	6,800	10	-1

**1.3.13** In order to identify future demand for outdoor sports facilities, locally-derived evidence-based standards of provision were applied for each facility type to assess future facilities. Overall, the following demand has been identified:

**Table 1.2: Suffolk Coastal District Council playing pitch assessment: identified future balance between supply and demand for pitches and non-pitch facilities.**

Facility	Standard	Current Population.	Current Facilities.	2027 Population.	Facility needs 2027.	Change
Athletics tracks.	1:250,000	124,600	0	132,000	0	No change.
Bowling greens.	1:2,800	124,600	35	132,000	38	+3
Tennis courts.	1:1,250	124,600	99	132,000	107	+8
Netball courts.	1:5,000	124,600	25	132,000	26	+1
Petanque pitches.	1:5,500	124,600	23	132,000	25	+2
Cycling facilities.	1:25,000	124,600	5	132,000	5	No change.
Multi-use games areas (MUGAs).	1:10,000	124,600	13	132,000	14	+1
Skate parks.	1:17,500	124,600	7	132,000	7	No change.
Watersports	1:10,000	124,600	12	132,000	13	+1

**1.3.14** The assessment concludes with an action plan to identify the ways in which current deficiencies might be met and partners involved, by type of facility. This includes improvement of identified existing facilities in terms of access, quality, ancillary facilities (e.g. changing rooms).



- 1.3.15** Additional to this identified need, the assessment notes that the Football Association has also calculated a shortfall of up to three and a half 3G pitches in the district.
- 1.3.16** WDC’s Playing Pitch and Outdoor Sports Facilities Assessment (2014) was undertaken by the same consultancy, in a similar format to SCDC’s assessment above. It also aims to identify the existing provision of pitches and outdoor sports facilities to identify areas of deficiency, review existing local standards of access to and quality of provision, and recommend opportunities and solutions for the provision, protection and improvement of facilities including the use of shared facilities.
- 1.3.17** The assessment highlights some slight differences in the socio-economic characteristics and population growth projection compared to SCDC, and this has implications for planning for future demand of facilities. The following table summarises WDC’s future demand for pitches by sport, by identifying the age range using each type of facility, the projected growth in this age range up to 2021, and the ‘Team Generation Rate’:

**Table 1.3: Waveney District Council playing pitch assessment: identified future balance between supply and demand for pitches and non-pitch facilities.**

Sport	Age	Population (2013).	Teams (2013).	Team Generation Rate.	Population (2021).	Teams (2021).	Change
Adult male football.	17–45	18,200	89	204	18,000	88	-1
Adult female football.	17–45	18,100	4	4,525	17,300	4	No change.
Boys youth football.	10–16	4,450	81	55	4,600	84	+3
Girls youth football.	10–16	4,350	10	435	4,450	10	No change.
Mini-soccer (mixed).	6–9	4,700	54	87	5,300	61	+7
Adult male cricket.	16–55	26,500	38	697	26,000	37	-1
Adult female cricket.	16–55	26,800	1	26,800	25,700	1	No change.
Boys junior cricket.	10–15	3,750	20	188	3,950	21	+1
Girls’ junior cricket.	10–15	3,600	0	--	3,850	0	No change.
Adult male rugby.	19–45	16,800	5	3,360	16,800	5	No change.

Sport	Age	Population (2013).	Teams (2013).	Team Generation Rate.	Population (2021).	Teams (2021).	Change
Adult female rugby.	19–45	16,750	2	8,375	16,000	2	No change.
Boys junior rugby.	13–18	4,150	19	218	3,800	17	-2
Girls' junior rugby.	13–18	3,900	4	975	3,700	4	No change.
Mini-rugby (mixed).	7–12	7,200	15	480	7,900	16	+1
Adult male hockey.	18–45	17,500	3	5,833	17,400	3	No change.
Adult female hockey.	18–45	17,400	5	3,480	16,700	5	No change.
Boys junior hockey.	8–17	6,400	0	--	6,550	0	No change.
Girls' junior hockey.	8–17	6,200	2	3,100	6,400	2	No change.

1.3.18 In order to identify future demand for outdoor sports facilities, locally-derived evidence-based standards of provision were applied for each facility type to assess future facilities. Overall, the following demand has been identified:

**Table 1.4: Suffolk Coastal District Council playing pitch assessment: identified future balance between supply and demand for pitches and non-pitch facilities.**

Facility	Standard	Current Population.	Current Facilities.	2027 Population.	Facility Needs 2027.	Change
Athletics tracks.	1:250,000	116,400	0	121,400	0	No change.
Bowling greens.	1:5,500	116,400	21	121,400	22	+1
Tennis courts.	1:2,500	116,400	44	121,400	48	+4
Netball courts.	1:10,000	116,400	11	121,400	12	+1

1.3.19 SCDC's Built Facilities Assessment (2014) aims to identify the built sporting and recreational infrastructure required to serve existing and new development, covering both the demand for and use of existing facilities

and identifying areas of deficiency and surplus, including priority locations for future provision of sports halls, swimming pools, health and fitness, indoor tennis, indoor bowls, squash courts, and village/community halls.

**1.3.20** The assessment identifies, based on market segmentation, that the dominant socio-economic characteristics in the district are likely to inflate demand for swimming, health and fitness and bowls facilities. In addition, through community consultation, a number of common themes have emerged including a shortage of public transport access to facilities in rural areas, and the value of village and community halls in delivering local leisure opportunities.

**1.3.21** Overall, it reports that sports club membership is higher than regional and national averages, as are participation rates in sports generally. The majority of people surveyed suggested that they visit leisure centres at least weekly, and that the level of provision of facilities was about right, although indoor tennis courts and dance studios were identified as lacking.

**1.3.22** A sub-area examination of provision across the district shows that per capita levels of more formal facility types such as sports halls, and squash courts, are generally higher in the southern sub-areas than in the north. For instance, provision in Leiston is less than half that in the Kesgrave and Felixstowe sub areas. The only indoor bowling centre is in Felixstowe as is the largest swimming venue. Access to health and fitness clubs is better in the south than the north. There is a higher level of village and community halls in the north, which may go some way to offset the comparative lack of more formal venues.

**1.3.23** On the basis of the analysis of the current balance between supply and demand of built facilities in Suffolk Coastal, the following needs have been identified:

**Table 1.5: Suffolk Coastal District Council built facilities: identified need.**

Facility	Quantity and Quality.
Sports halls.	Current levels of provision are adequate to meet existing needs. Improvements needed: <ul style="list-style-type: none"> <li>• Woodbridge School playing surface;</li> <li>• disabled changing improvements at all sites; and</li> <li>• information provision at school sites.</li> </ul>
Swimming pools.	Current levels of provision are adequate to meet all needs in the district. Improvements needed: <ul style="list-style-type: none"> <li>• disabled hoists at all pools;</li> <li>• disabled changing improvements at all sites; and</li> <li>• all public pools are ageing and will need major refurbishment or replacement in due</li> </ul>

Facility	Quantity and Quality.
	course.
Indoor bowls.	Current levels of provision are adequate to meet existing needs. Market segmentation data indicates that bowls demand should be above the national average. An additional centre may desirable as long-term objective. All aspects of the current facility are good quality. Disabled changing improvements needed.
Indoor tennis.	No provision in the district, although needs are met by the ten-court facility at David Lloyd which is just over the Ipswich border. The quality of the existing courts at David Lloyd Ipswich is good.
Health and fitness.	Comparatively low level of provision but no evidence of need for additional facilities. Support for additional facilities to be provided by commercial operators. Facilities and changing improvements needed at: <ul style="list-style-type: none"> <li>• Lacey's Fitness;</li> <li>• Farlingaye High School; and</li> <li>• Otley College.</li> </ul> Adaptive equipment needed for disabled users at all public facilities. Disabled changing improvements at all sites.
Squash	High levels of provision meet existing needs. All courts are good quality but disabled changing improvements needed.
Village/ community halls.	Current levels of provision are adequate to meet existing needs, although only 67% of halls meet formal or informal sport's needs. Facilities are very variable in age, size and range of facilities and disabled access improvements needed at some sites.

1.3.24 In order to identify future demand for indoor/built sports facilities, locally-derived evidence-based standards of provision were applied for each facility type to assess future facilities. Overall, the following demand has been identified:

**Table 1.6: Suffolk Coastal District Council built facilities: identified future need.**

Facility	Current Facilities.	Current Provision.	Recommended Standard.	Additional Population (2027).	Facilities Needed (2027).
Sports halls.	12	1:10,383	1:10,000	7,400	0.74 halls.
Swimming pools.	4	1:31,075	1:30,000	7,400	0.25 pools.
Indoor bowls.	1	1:124,600	1:124,600	7,400	0.12 facilities.
Indoor tennis.	0	--	1:41,500	7,400	0
Health and fitness.	10	1:12,460	1:12,460	7,400	0.6 facilities.

Facility	Current Facilities.	Current Provision.	Recommended Standard.	Additional Population (2027).	Facilities Needed (2027).
Squash	20	1:6,200	1:6,200	7,400	1.2 courts.
Village/ community halls.	110	1:1,133	1:1,100	7,400	6.7 halls.

1.3.25 The assessment concludes with recommendations for the ways in which current deficiencies might be met and partners involved, by type of facility. This includes improvement of identified existing facilities in terms of access, quality, ancillary facilities and support with external funding applications for facilities at specific sites.

b) [Audit of existing provision](#)

1.3.26 **Annex 9E.1** sets out a detailed audit of existing demand across local areas within the 60-minute study area using Sport England’s SPOGO website (Ref. 1.7).

1.4 **Estimated additional demand from Sizewell C workforce**

1.4.1 Potential demand for sports facilities from the NHB construction workforce may be estimated based on:

- Sport England’s ‘sports facilities calculator’ – which identifies demand from new development for certain types of facilities – however, the types of facilities included are limited, and the tool is not meant for the planning of new provision; or
- SCDC’s detailed analysis of existing demand, and surplus/deficiency, based on team generation rate per population, converted to pitch/facility requirement per person.

1.4.2 Demand is also influenced by several factors, such as the demographic, and market segmentation of the workforce, its accommodation type, shift patterns, location, scale and permanence.

1.4.3 For example, market segmentation research undertaken by Sport England identifies that certain facilities are more/less demanded by certain demographics – in the case of the Sizewell C construction workforce (predominantly male) this suggests more demand for football facilities and gym facilities (as set out within market segmentation).

## a) Area-wide assessment – 60-minute area

## i. Sport England sports facilities calculator approach

- 1.4.4 The sports facilities calculator is primarily a tool to help local planning authorities quantify the additional demand for key community sports facilities from new housing development.
- 1.4.5 An important consideration is that the sports facilities calculator is based on permanent residents, whereas demand of NHB workers at Sizewell C is temporary - the sports facilities calculator is based on demand arising from permanent housing.
- 1.4.6 In the case of Sizewell C, the increase in residents would be temporary over (up to) 12 years, peaking at up to 5,884 at the peak of construction. Simply feeding in the increase in population at peak (or at any point) would therefore overstate the demand for facilities, so there is a need to convert the number of workers moving into the area into an equivalent permanent population.
- 1.4.7 On average over the construction period the top end of this range equates to an annual average equivalent to 2,600 people being temporarily in the area to construct the Sizewell C Project.
- 1.4.8 Whilst the construction period is a relatively long time, it is less than the expected lifespan of most sports facilities.
- 1.4.9 A further adjustment therefore needs to be made to account for that. Allowing for use in 12 years of the 15-year maintenance lifespan of the facility means a reduction of around a quarter, or the equivalent of c. 2,100 permanent residents – an overall adjustment of 80% to convert from temporary residents to a permanent equivalent. The same lifespan/maintenance period is applied to sports halls.
- 1.4.10 It is relevant to apply additional criteria to account for the above caveats and to therefore identify a realistic net additional demand for facilities from the sports facilities calculator. **Table 1.7** therefore also:
- discounts workers in accommodation that would otherwise be occupied by existing local residents, and who would contribute towards service provision via general taxation; and
  - reduces demand by c. 20% to account for shift patterns and workers going home at weekends.
- 1.4.11 The following assessment is based on Sport England's sports facilities calculator, applied to a 'user profile' based on the likely demographic

characteristics of NHB workers at two intervals during the construction period. The first assessment point is immediately prior to completion of the on-site accommodation campus and caravan site, and the second is at overall construction peak when NHB workforce is at its highest. Assumptions on the gender and age split of the construction workforce have been based on 2011 Census data.

1.4.12 The following table outlines the number of NHB workers on average, and at the peak of construction employment, and the Sport England facilities calculator outputs for each measure.

**Table 1.7: Potential sports facilities demand arising from the non-home-based workforce.**

		Average	Peak	Permanent Equivalent (average).
Total construction workers.		3,880	7,900	3,100
# NHB.		Up to 2,600.	Up to 5,884.	2,100
Discounts applied.		N/A	N/A	Up to 1,248.
Sports Facilities Calculator Potential Demand – Average Permanent Equivalent.				
Pools	Area	11.67 sqm.		
	Lanes	0.22 lanes.		
	Pools	0.05 pools.		
Halls	Courts	0.41 courts.		
	Halls	0.10 halls.		
Indoor bowls.	Rinks	0.08 rinks.		
	Centres	0.01 centres.		
Synthetic pitches.	Pitches	0.06 pitches.		

1.4.13 The Sport England sports facilities calculator does not include the estimated demand for provision of gyms/health and fitness suites. Separate Sport England guidance suggests that the provision of 38 gym stations per 10,000 population is adequate provision.

ii. **Local authority standard approach**

1.4.14 **Table 1.8** sets out, using standards for team generation rates identified by SCDC, the additional demand that might be expected to be green-rated from the Sizewell C workforce.

1.4.15 It is relevant to apply additional criteria to account for the above caveats on permanent versus temporary provision, and to therefore identify a realistic

net additional demand for facilities. **Table 1.8** therefore also includes a central scenario which:

- uses the average NHB workforce across the workforce profile, rather than the peak;
- discounts workers in accommodation that would otherwise be occupied by existing local residents and who would contribute towards service provision via general taxation;
- reduces demand by c. 20% to account for shift patterns and workers going home at weekends; and
- discounts based on permanent equivalent demand, as per above, accounting for the construction period length compared to average facility lifespan.

**Table 1.8: Potential sports facilities demand arising from the non-home-based workforce.**

Facility Type.	Standard (based on SCDC team generation rate per total population).	Potential Estimated Demand from Sizewell C NHB Workforce.
		Up to 5,884 NHB Workers – Reduced to 1,248 Permanent Equivalent Based on Discounts Above.
Adult football pitches.	Adult m 1:231. Adult f 1:16,100.	4.71 teams generated.
Cricket pitches.	Adult m 1:891. Adult f 1:9,467.	1.24 teams generated.
Rugby pitches.	Adult m 1:1,236. Adult f 1:17,100.	0.89 teams generated.
Synthetic turf hockey pitch.	Adult m 1:1,215. Adult f 1:1,208.	1.03 teams generated.
Facility Type.	Standard (facilities required per total population).	Up to 5,884 NHB Workers – Reduced to 1,248 Permanent Equivalent Based on Discounts Above.
Athletics tracks.	1:250,000	0.00
Bowling greens.	1:2,800	0.45
Tennis courts.	1:1,250	1.00
Netball courts.	1:5,000	0.25
Petanque pistes.	1:5,500	0.23
Cycling facilities.	1:25,000	0.05
MUGAs.	1:10,000	0.12



Facility Type.	Standard (based on SCDC team generation rate per total population).	Potential Estimated Demand from Sizewell C NHB Workforce.
		Up to 5,884 NHB Workers – Reduced to 1,248 Permanent Equivalent Based on Discounts Above.
Skateparks.	1:17,500	0.07
Watersports.	1: 10,000	0.12
Indoor tennis courts.	1:124,600	0.01
Health and fitness suites.	1:12,460	0.10
Squash courts.	1:6,200	0.20

b) Summary – potential additional demand from Sizewell C NHB workforce

1.4.16 The above project-wide assessments use national standards (Sport England) and local standards (ESC) to identify the potential for Sizewell C’s net additional, permanent equivalent average workforce to generate demand for sports facilities/teams (that are used to identify potential demand).

1.4.17 This sets out that while there would be some demand generated, due to net additionality and funding through general taxation, this would be limited to a **not significant** effect.

1.4.18 Nonetheless, the Sizewell C construction workforce is of a relatively narrow demographic, and its distribution may result in disproportionate demand for facilities in some locations that are not highlighted by the above analysis. As such, the following section provides a qualitative assessment on potential demand for sports and leisure facilities in Leiston.

c) Local area assessment – Leiston

1.4.19 **Annex 9E.1** sets out the existing supply of facilities in local areas within the 60-minute area, and the potential additional demand generated by Sizewell C’s NHB workforce.

1.4.20 This highlights that areas to the east of the A12, and in particular Leiston, would experience the greatest increase in temporary NHB workers, and therefore is likely to be the location in which additional demand for facilities is generated. While facilities are more strategic in terms of their catchments, the nature of the NHB construction workforce is such that facilities are likely to be accessed as close to their accommodation as possible.

1.4.21 There is a pre-existing ‘surplus’ of playing pitch capacity in some areas of SCDC, including Leiston and surrounding areas, where the greatest demand for facilities from Sizewell C workforce is likely to arise, based on standards applied by SCDC. SCDC’s assessment of its playing pitches identifies the current usage of pitches, and estimates ‘spare capacity’ in terms of the number of matches per week that could be played on them.

1.4.22 The council’s assessment considers population growth up to 2027, and therefore identifies potential areas of deficiency in the future – across the district this is considered generally minor. The greatest future need appears to be for tennis courts – though it is noted that these are actually very well provided for in Leiston.

1.4.23 Based on a review of the council’s assessment, compared to the types of facilities that may be in demand by existing population growth, as well as the scale and demographic of potential construction workers, it is clear that the key facilities missing in or near Leiston are:

- synthetic turf (e.g. 3G) pitch – closest facilities in Framlingham and Woodbridge;
- athletics track – closest track in Ipswich; and
- MUGA – closest facility in Yoxford.

1.4.24 Demand for athletics provision is more strategic in nature, and unlikely to be significantly added to by the specific demands from the demographic of the NHB workforce as demonstrated in this assessment.

1.4.25 However – there is likely to be more demand for synthetic turf pitches and MUGAs as a result of the NHB workforce, and in particular in Leiston where there is an identified community demand for these facilities too. This local level of demand and supply has influenced SZC Co.’s mitigation strategy.

## 1.5 Mitigation proposals

1.5.1 In order to mitigate potential localised demand from construction workers for specific facilities, in the context of overall sufficiency, but localised deficiency in Leiston, and in terms of certain facilities which the construction workforce demographic is more likely to seek, SZC Co. has developed a collaborative plan with ESC to deliver new sports facilities in Leiston. These facilities would mitigate the potential additional demand highlighted, and also enable the Sizewell C Project to attract a high-quality workforce.

1.5.2 The Sizewell C Project would include:

- On-site informal recreation facilities at the accommodation campus comprising an equipped gym.
- Off-site facilities including a full-size 3G football pitch, and two MUGAs, on Alde Valley School's playing fields in Leiston, adjacent to Leiston Leisure Centre. These facilities would serve both the construction workforce, the school and the local community, subject to agreement of management protocols and safeguarding via physical and temporal management.

1.5.3 The Football Foundation (Ref. 1.8) suggests that a standard 3G pitch may have a life span of up to ten years if maintained correctly<sup>2</sup>. This suggests a sinking fund would be required to guarantee long-term (post construction phase) legacy use. A management plan would need to be agreed for its maintenance during the construction phase and its management/responsibility post-construction.

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<sup>2</sup> It is considered that a Football Turf Pitch (FTP) has a life span of approximately ten years depending on factors such as pitch type and quality, usage and maintenance. The Football Foundation insists that a sinking fund is set up for the future replacement of the surface. It is estimated that the cost of resurfacing a full-sized FTP (including removal and disposal of the existing surface and infill and professional fees) would be between £180,000 and £200,000 as of January 2013. The cost of a full rejuvenation of the carpet in year five/six should also be taken into account. It is suggested that an allowance of £25,000 per annum is placed into a 'ring-fenced' sinking fund account to cover these future costs - **The Football Foundation's Guide to Developing Third Generation Football Turf Pitches.**

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## 1. Annex 9E.1 Local Sports Facilities Audit

**Table 1.1: Sports facilities in Leiston Ward (Sport England, 2019).**

Name	Type	Facilities
Alde Valley Academy.	Private outdoor.	Cricket (1 x adult), Football (1 x adult), Senior Rugby League (1 x adult), Hockey (2 x Artificial Grass Pitch).
Leiston Leisure Centre.	Private outdoor/indoor.	Sports hall, Swimming pool, Gym, Studio, Squash (2).
Former Leiston Middle School site.	Other	
Leiston Primary School.	Other	
Junction Meadow (Leiston St. Margaret's Football Club).	Public outdoor.	Football (1x adult).
Leiston Town Athletic Association Sports Ground.	Public outdoor.	Football (1x adult, 1x junior), Tennis.
Sizewell Sports & Social Club.	Public outdoor/indoor.	Football (1x adult, 1 x junior), Sports hall.
Summerhill School.	Private outdoor/indoor.	Football (1 x adult), Lido, Tennis (1).
Victory Road Recreation Ground and Skate park.	Other	Recreation ground.
Haylings Pond.	Other	Water area.
Leiston WI.	Other	Community hall.
Leiston Community Centre.	Other	Community hall.
Home Guard Social Club.	Other	Social club.

**Table 1.2: Sports facilities in Aldeburgh Ward (Sport England, 2019).**

Name	Type	Facilities
Kings Field Recreation Ground.	Public outdoor.	Football (1 x adult), Rugby Union (1 x adult).
Ogilvie Pavilion and Sports Ground at Thorpeness.	Public outdoor.	Cricket (1x grass pitch).
Thorpeness Golf Club and Hotel.	Private outdoor.	Golf, 18 holes.
Aldeburgh Golf Club.	Public outdoor.	Golf (1 x 18 holes, 1 x 9 holes).

**Table 1.3: Sports facilities in Saxmundham Ward (Sport England, 2019).**

Name	Type	Facilities
Saxmundham Free School.	Private outdoor.	Rounders (1), Football (1 x adult), Rugby Union (1), Tennis (2).
Kelsale Park.	Public outdoor.	Football (1 x adult).
Carlton Meres Country Park.	Private outdoor/indoor.	Lido, Tennis (1).
Saxmundham Sports & Recreation Club.	Public outdoor.	Cricket (1), Football (1x adult, 2 x junior), Tennis (3).

**Table 1.4: Sports facilities in Suffolk Coast and Heaths (Sport England, 2019).**

Name	Type	Facilities
HMP Warren Hill.	Private outdoor.	Football (1 x adult).
Woodbridge Rugby Club.	Public outdoor.	Rugby (2 x senior rugby union, 1 x junior rugby union).
Rock Barracks.	Private outdoor.	Football (1 x adult), Rugby Union (1), Hockey (1 x Artificial Grass Pitch).
Woodbridge Golf Club.	Private outdoor.	Golf (1 x 18 holes, 1 x 9 holes).
Bawdsey Recreation Ground.	Private outdoor.	Tennis courts (2).
Blaxhall Playing Field.	Public outdoor.	Football (1 x adult).
HMP Hollesley Bay Colony.	Private outdoor/indoor.	Football (1 x adult), Tennis (2), Gym, Sports hall.
Tunstall Playing Field.	Public outdoor.	Football (1 x mini soccer).
Hollesley Primary School.	Private outdoor.	Lido, Football (1 x mini soccer).
Jubilee Park.	Public outdoor.	Football (2 x junior).
Eyke Ce Primary School.	Private outdoor/indoor.	Football (1 x junior), Swimming pool.
Hollesley Village Playing Field.	Public outdoor.	Football (1 x adult, 1 x junior).
Rendlesham Community Primary School.	Private outdoor/indoor.	Football (2 x mini soccer), Sports hall.
Rendlesham Forest Centre.	Public outdoor.	Mountain bike trails.
Bawdsey Church of England Voluntary Controlled Primary School.	Private outdoor.	Football (1 x junior).

Name	Type	Facilities
Orford Recreation Ground.	Private outdoor.	Football (1x adult, 1x junior), Tennis (2).
Campsea Ashe Playing Field.	Public outdoor.	Football (1x adult).
Tunstall Forest.	Public outdoor.	Mountain bike trails.
Sutton Recreation Ground.	Private outdoor.	Football (1 x junior).

**Table 1.5: Sports facilities in Yoxford & Westleton Ward (Sport England, 2019).**

Name	Type	Facilities
Yoxford Cricket Club.	Public outdoor.	Cricket (1).
Middleton Cum Fordley Recreation Ground.	Public outdoor.	Cricket (1).

**Table 1.6: Sports facilities in Woodbridge & Wickham Market (Sport England, 2019).**

Name	Type	Facilities
St Mary's Primary School.	Private outdoor.	Football (1 x junior).
Seckford Golf Club.	Private outdoor.	Golf (1 x 18 holes, 1 x driving range).
Woodbridge School.	Public outdoor/indoor.	Hockey (1 x Artificial Grass Pitch, 2 x grass), Gym, Football (1 x adult), Cricket (2), Rugby Union (2 x senior), Rounders (6), Sports hall, Lido.
Otley College.	Private indoor.	Gym
Heath Primary School.	Private indoor.	Football (2 x junior).
Bredfield Village Hall Playing Field.	Public outdoor.	Football (1 x adult), Tennis (2).
Kesgrave Community – Conference and Sports Centre.	Public outdoor/indoor.	Sports hall, Cricket (1), Football (2 x adult, 2 x mini soccer), Tennis (4), Hockey (1 x Artificial Grass Pitch), Cycle speedway tracks.
Gorseland Primary School.	Private outdoor.	Hockey (1 x Artificial Grass Pitch).
Swilland & Witnesham Playing Field.	Public outdoor.	Football (2 x junior, 1 x mini soccer).
Kingston Playing Field.	Public outdoor.	Football (1 x junior), Tennis (6), Cricket (1).
St Audrys Golf Club.	Private outdoor.	Golf (1 x 9 holes).
Ipswich Town Training Ground.	Public outdoor.	Football (4 x adult, 5 x junior, 2 x 3G).

**NOT PROTECTIVELY MARKED**

Name	Type	Facilities
Grundisburgh Playing Field.	Public outdoor.	Football (1x adult), Tennis (3).
St Audrey's Sports and Social Club.	Public outdoor.	Football (1 x adult, 1 x junior), Cricket (1).
Woodbridge School (The Abbey).	Private outdoor.	Tennis (2).
Beacon Hill Pool.	Public indoor.	Swimming pool.
Ufford Recreation Ground.	Public outdoor.	Football (1 x adult), Tennis (1).
Simon's Cross Playing Field.	Public outdoor.	Football (1 x adult, 2 x junior), Tennis (3).
Grundisburgh Primary School.	Private outdoor.	Football (1 x junior).
Farlingaye High School.	Public outdoor/indoor.	Sports hall, Gym, Football (1 x adult, 1 x junior), Cricket (1), Rugby Union (2) x adult), Hockey (1 x grass).
Woodbridge Town Football Club.	Public outdoor.	Football (2 x adult).
Suffolk Constabulary Ground.	Private outdoor.	Football (2 x adult, 1 x junior).
Martlesham Leisure Health & Fitness Club.	Private indoor.	Swimming pool, Gym, Studio, Squash (8).
Martlesham Heath Green.	Public outdoor.	Football (4 x mini soccer), Cricket (1).
Ipswich School Sports Centre.	Public outdoor/indoor.	Football (2 x adult), Sports hall, Hockey (3 x Artificial Grass Pitch).
Deben Leisure Centre.	Private indoor.	Swimming pool, Gym, Studio.
Melton Recreation Ground.	Public outdoor.	Football (2 x junior), Tennis (2), Hockey (1 x Artificial Grass Pitch).
Fynn Valley Golf Club.	Private outdoor.	Golf (1 x 18 holes, 1 x 9 holes, 1 x driving range).
Birchwood Primary School.	Private outdoor.	Football (1 x junior).
Martlesham Recreation Ground.	Public outdoor.	Football (1 x adult).
Wickham Market Village Hall Playing Field.	Public outdoor.	Football (1 x adult).
Martlesham Primary Academy.	Private outdoor indoor.	Athletics tracks, Sports hall, Football (1 x mini soccer).
Kesgrave High School.	Public outdoor/indoor.	Sports Hall, Gym, Studio, Cricket (1), Football (3 x adult, 1 x junior, 1 x 3G), Hockey (1 x grass), Rugby Union (2 x senior).



Name	Type	Facilities
Millennium Sports Ground.	Public outdoor.	Football (1 x adult, 3 x junior).
Ufford Park Spa and Health Club.	Private outdoor/indoor.	Swimming pool, Gym, Golf (1 x 18 holes, 1 x driving range), Studio.
Broke Hall Community Primary School.	Public outdoor.	Football (1 x junior).
YM sports ground.	Private outdoor/indoor.	Rugby Union (3 x senior, 12 x junior), Gym.
Cedarwood Primary School.	Private outdoor.	Football (1 x mini soccer, 1 x 3G).

**Table 1.7: Sports facilities in Southwold & Halesworth (Sport England, 2019).**

Name	Type	Facilities
St Felix School.	Private outdoor/indoor.	Gym, Cricket (2), Rugby Union (2 x senior, 1 x junior), Hockey (1 x grass), Rounders (5), Sports hall, Swimming pool, Football (2 x adult, 3 x junior), Squash (2).
Westhall Playing Field.	Private outdoor.	Football (1x adult).
Spexhall Playing Field.	Public outdoor.	Football (1x adult).
Southwold Golf Club.	Private outdoor.	Golf (1 x 18 holes).
Halesworth Playing Fields (Dairy Hill).	Public outdoor.	Football (1x adult, 2 x junior), Tennis (2).
Bramfield House School.	Private outdoor/indoor.	Football (1 x adult, 1 x junior), Sports hall, Swimming pool.
Southwold Common Football Pitch.	Public outdoor.	Football (1x adult).
Holton St Peter Country Primary School.	Private outdoor.	Football (1 x junior).
Halesworth Golf Club.	Private outdoor.	Golf (1 x 18 holes, 1 x 9 holes, 1 x driving range).
Southwold Common (Southwold Rugby Football Club).	Public outdoor.	Rugby Union (2 x senior).
Halesworth Campus Sports Complex.	Private outdoor.	Tennis (3).
Wenhaston Recreation Ground.	Public outdoor.	Football (1 x adult), Tennis (1).
Reydon Playing Fields.	Public outdoor.	Football (1 x adult, 4 x junior, 2 x mini soccer).

Name	Type	Facilities
Sole Bay Bowls Club.	Public indoor.	Bowls (4 x rinks).
Southwold Common Cricket Pitch.	Public outdoor.	Cricket (1).

**Table 1.8: Sports facilities in Beccles, Bungay and Kessingland (Sport England, 2019).**

Name	Type	Facilities
Sir John Leman High School.	Private outdoor/indoor.	Sports hall, Gym, Football (3 x adult, 1 x 3G), Rugby Union (1 x senior), Cricket (1), Squash (1).
Bungay and Waveney Valley Golf Club.	Private outdoor.	Golf (1 x 18 holes).
St Benet's Catholic Primary School.	Private outdoor.	Football (1 x junior).
Ringsfield Playing Field.	Public outdoor.	Tennis (2), Cricket (1).
Kessingland Beach Holiday Park.	Private outdoor/indoor.	Swimming pool (1 x lido, 1 x general), Tennis (1).
Bungay Pool and Gym.	Private indoor.	Swimming pool, Studio, Gym.
Kessingland Community Centre Playing Field.	Public outdoor.	Football (3 x junior).
Carlton Colville Primary School.	Private outdoor/indoor.	Swimming pool, Football (3 x mini soccer).
Oaklands Leisure Pool.	Public indoor.	Swimming pool.
Ilketshall St Lawrence Primary School.	Private outdoor.	Football (1 x junior).
Bungay High School.	Private outdoor/indoor.	Sports hall, Football (2 x adult, 1 x junior), Cricket (1), Rugby Union (1 x senior), Rounders (5), Gym.
College Meadow (Beccles Town Football Club).	Public outdoor.	Football (1 x adult, 2 x mini soccer, 1 x 3G), Rugby Union (1 x senior), Cricket (1).
Nirvana Fitness Ltd.	Private indoor.	Gym, Swimming pool, Studio (3).
Beccles Golf Club.	Private outdoor.	Golf (1 x 9 holes).
Heathland Beach Caravan Park.	Private outdoor/indoor.	Lido, Tennis (1), Football (1 x junior).
Alan Hutchinson Field.	Public outdoor.	Football (2 x junior, 1 x 3G), Tennis (3).
Wrentham Playing Field.	Private outdoor.	Football (1 x adult).

Name	Type	Facilities
Beccles Free School.	Private outdoor/indoor.	Rugby Union (1 x senior), Hockey (1 x grass), Sports hall, Football (4 x junior).
Beccles Caxton Club.	Private outdoor.	Football (1 x adult).
Beccles Lido.	Private outdoor.	Lido
Pontins Pakefield Holiday Centre.	Private outdoor.	Swimming pool, Football (1 x adult), Tennis (2).
Beccles Indoor Bowls Club.	Public indoor.	Bowls (4 x rinks).
Beccles Primary Academy.	Private outdoor/indoor.	Sports hall, Football (1 x mini soccer).
Raw Soccer.	Private outdoor.	Football (1 x 3G).
Worlingham CEVC Primary School.	Public indoor.	Sports hall.

**Table 1.9: Sports facilities in Lowestoft (Sports England, 2019).**

Name	Type	Facilities
Denes Oval.	Private outdoor.	Tennis (8), Cricket (1).
Oulton Recreation Ground.	Public outdoor.	Football (1 x adult, 1 x mini soccer).
Benjamin Britten High School.	Private outdoor/indoor.	Gym, Cricket (1), Rounders (1), Football (2 x adult, 1 x junior), Hockey (1 x grass), Rugby Union (1 x junior), Sports hall, Studio.
Nicholas Everitt Park.	Private outdoor.	Tennis
Ormiston Denes Academy.	Private outdoor/indoor.	Rounders (3), Football (3 x adult, 1 x 3G), Cricket (1), Rugby Union (1 x senior), Sports hall, Studio.
Oulton Broad Primary School.	Public outdoor.	Rounders (1).
Waterlane Leisure Centre.	Private outdoor/indoor.	Sports hall, Swimming pool, Gym, Squash (2), Hockey (1 x Artificial Grass Pitch), Studio.
Dip Farm.	Private outdoor.	Golf (1 x 9 holes).
Elm Tree Primary School.	Private outdoor.	Football (3 x junior), Cricket (1).
The Ashley School Academy Trust.	Private outdoor/indoor.	Sports hall, Rugby Union (1 x senior), Swimming pool, Football (1 x adult, 1 x mini soccer).
Barnards Soccer Centre.	Public outdoor.	Football (2 x junior, 4 x mini soccer, 1 x 3G), Rounders (3).

Name	Type	Facilities
Northfield St Nicholas Primary Academy.	Private outdoor.	Football (1 x mini soccer).
Corton Playing Fields.	Public outdoor.	Football (2 x adult).
Pakefield High School.	Private outdoor/indoor.	Sports hall, Football (1 x junior, 4 x mini soccer), Rugby Union (1 x junior).
Broadland Health and Fitness.	Private indoor.	Swimming pool, Gym.
Kirkley and Pakefield Sports and Social Club.	Public outdoor.	Football (2 x adult, 6 x junior, 2 x mini soccer, 2 x 3G).
Rookery Park Golf Club.	Private outdoor.	Golf (1 x 18 holes, 1 x 9 holes, 1 x driving range).
Dip Farm Playing Fields.	Public outdoor.	Football (4 x adult).
Warren School.	Private outdoor/indoor.	Football (1 x junior), Sports hall, Swimming pool.
Dell Primary School.	Private indoor.	Swimming pool .
Carlton Colville Community Centre.	Public outdoor.	Football (1 x adult).
Bannatynes Health Club (Lowestoft).	Private indoor.	Swimming pool, Gym, Studio (3).
Uplands Community Centre.	Private outdoor/indoor.	Football (1 x junior, 1 x mini soccer), Sports hall.
Normanston Park.	Public outdoor.	Cricket (2), Football (4 x adult), Tennis (6).
Westwood Primary School.	Private outdoor.	Football (1 x mini soccer).
Saturn Close Sports Ground.	Public outdoor.	Football (1 x adult).
Gunton Hall Resort.	Private indoor.	Bowls (4 x rinks), Swimming pool.
Pakefield Primary School.	Private outdoor.	Rounders (2), Football (2 x mini soccer).
Lowestoft & Yarmouth Rugby Club.	Public outdoor.	Rugby Union (3 x senior), Cricket (1).
Grove Primary School.	Private outdoor/indoor.	Sports hall, Football (1 x mini soccer).

**Table 1.10: Sports facilities in Framlingham and Peasenhall (Sport England, 2019).**

Name	Type	Facilities
Dennington Village Hall.	Public outdoor.	Football (1 x adult), Tennis (1), Sports hall.
Thomas Mills High School.	Public outdoor/ indoor.	Sports hall, Hockey (2 x grass), Rugby Union (2 x senior), Cricket (1), Football (2 x adult, 1 x junior), Studio.
Easton Cricket Club.	Public outdoor.	Cricket (2).
Glevering Hall.	Private indoor.	Sports hall.
Brandeston Village Hall.	Public outdoor.	Tennis (1).
Framlingham College.	Private outdoor/indoor.	Hockey (2 x Artificial Grass Pitch, 3 x grass), Gym, Football (1 x adult), Cricket (2), Rugby Union (4 x senior), Rounders (3), Sports hall, Swimming pool, Squash (2), Golf (1 x 9 holes).
Hubbards Hill Recreation Ground.	Public outdoor.	Football (1x adult).
Charsfield.	Public outdoor.	Tennis (2), Football (1 x mini soccer).
Kingfishers Golf Club.	Private outdoor.	Golf (1 x 18 holes, 1 x driving range).
Framlingham Sports Ground.	Public outdoor.	Football (3 x adult, 5 x junior), Tennis (3).



VOLUME 2, CHAPTER 9, APPENDIX 9F: SUFFOLK COAST VISITORS SURVEY



October 2019

**Sizewell C:**

**Suffolk Coast Visitors Survey**

Ben Marshall

Lewis Hill

Imogen Drew

# Contents

<b>1. Background</b>	<b>1</b>
Introduction and objectives	1
Weighting data	6
Data interpretation	7
Statistical reliability	7
Acknowledgements	9
Data publication	9
<b>2. Visiting the Suffolk coast</b>	<b>11</b>
Who visits the Suffolk coast?	11
Past visiting patterns	12
Why do people visit this part of Suffolk?	14
What do people plan to do on their visits?	18
Sources of information about the Suffolk coast	19
<b>3. Sizewell C</b>	<b>22</b>
Effect of news stories on likelihood to visit	22
Awareness of existing Sizewell sites	23
Knowledge of the proposed development of Sizewell C	24
Likelihood to visit	25
The Tourism Fund	32
Attitudes towards nuclear and energy generation	34
<b>Appendices</b>	<b>35</b>
Appendix 1: The questionnaire	36
Appendix 2: Description of proposed Sizewell C development	56
Appendix 3: Topline summary	59



# 1. Background

# 1. Background

## Introduction and objectives

SZC Co. plans to build a new nuclear power station, Sizewell C, to the north of the existing Sizewell B power station in Suffolk. The application for a Development Consent Order (DCO) includes a number of associated developments including new roads, a rail link, freight management, park and ride sites, a workforce accommodation campus and a workforce caravan site. SZC Co. ran a fourth and final stage of consultation for a new nuclear power station at Sizewell C in Suffolk between July and September 2019.

In October 2018, SZC Co. commissioned qualitative research on visitors to the Suffolk coast. This comprised 'on the ground' interviews in four locations on the Suffolk coast, along with discussion (focus) groups. It helped to identify aspects of the Suffolk visitor experience that visitors particularly value, as well as sensitivities towards, and concerns about, the potential development of Sizewell C. The findings of that qualitative research led to the development of an online quantitative survey, designed and undertaken by Ipsos MORI. The survey was designed to measure the extent to which the construction phase of Sizewell C might present changes that could be perceived to influence the behaviour of visitors to the Suffolk coast. The survey therefore creates an evidence base to help understand:

- Potential and previous visitors' attitudes to the proposed development.
- Awareness of Sizewell B and Sizewell C.
- Perceptions of key concerns and sensitivities, and how elements of the construction phase of Sizewell C might influence behaviour.
- Views, ideas and suggestions for the potential use of a Tourism Fund that may help to alleviate perceived and real changes to the visitor experience.

The survey was conducted using an online methodology, sampling via the Ipsos Online Access Panel described in the section which follows.

## Methodology

### Sampling and data collection

This survey was designed by Ipsos MORI to provide an evidence base that will help SZC Co. and local stakeholders deliver effective mitigation to avoid or reduce perceptions that may otherwise lead to changes in visitor behaviour.

It was decided that the survey would be carried out online using the Ipsos Online Access Panel. The main advantage of online interviewing is that it removes geographic barriers; face-to-face in-home or in-street fieldwork was impractical given the required sample size. Telephone interviews were also impractical given the requirement to test visual materials (such as maps); a key component of this survey. Although there is some unavoidable coverage bias with using online survey panels, 91% of adults in Great Britain now have internet access, meaning that our online panel can be used to generate samples which reflect the demographic make-up of the online and offline adult population.

To reach a nationally representative sample – the starting point for our sampling of visitors to the Suffolk coast – quotas were set for age, gender, working status, region, education and social grade. Invitations were sent out to members of the Ipsos Access Panel i.e. UK adults in England, Scotland, Wales and Northern Ireland aged between 16 and 75 years old, to generate responses from a sample who had either:

- visited the part of the Suffolk coast of interest (i.e. the area surrounding the Sizewell sites) in the past 12 months/the past year; or
- say they are likely to visit in the next 24 months/two years.

Note that the part of the Suffolk coast referred to in this piece of research is a smaller, sub-area of geographical regions widely appreciated as the Suffolk coast and Area of Outstanding Natural Beauty (AONB). It will be referred to as the '*Suffolk coast*' throughout this report.

In total 7,730 adults aged over 16 entered the screener survey. From this, 40% (3,093 participants) were eligible to complete the mainstage survey. These past and potential future visitors to the Suffolk coast comprised our target group of interest.

Fieldwork took place between 14 June and 25 July 2019 via the Ipsos Online Access Panel.

For those who were eligible, the survey took on average 12 minutes to complete. It was estimated that it would take up to 20 minutes to complete the survey in its entirety. However, as sections of the survey are filtered out based on answers given at earlier stages, the average completion time is considerably lower; the full survey (consisting of 51 questions) will only have been completed by a small sub-group of the whole sample.

### Profile of visitors

As described above, '*visitors*' were defined as those who had visited the Suffolk coast in the last year (12 months), or who said they are likely to visit in the next two years. The vast majority (98%) of this group of 3,093 said they are '*fairly likely*', '*very likely*' or '*certain*' to visit in the next 24 months, and 1,030 (33%) said they had visited this area of the Suffolk coast in the past 12 months.

Much of this report concentrates on the group of 3,093 '*visitors*' but it should be remembered that 43% of them have not previously visited the Suffolk coast (but are either fairly likely, very likely or certain to visit in the next 24 months). Further detail about the profile of visitors is shown in **Table 2.1** below, and is described in **Chapter 2** of this report.

As would be expected, our sample of past/potential visitors does not precisely mirror the profile of the UK population. **Table 2.1** below highlights key differences. As displayed, our sample of visitors is more geographically concentrated in the London and East of England regions, is made up of a greater proportion of individuals from social grades A and B, and is very slightly younger overall than the UK population.

**Table 2.1.** Survey-generated profile of visitors\* compared to the UK population

	<b>Part of Suffolk of Interest (%)</b>	<b>UK (%)</b>	<b>+ Difference</b>
<b>London</b>	17	13	+4
<b>South-East</b>	13	14	-1
<b>East</b>	15	10	+5
<b>AB</b> (higher/intermediate managerial, administrative, professional)	47	27	+20
<b>C1</b> social grade (supervisor/clerical/junior managerial, administrative, professional)	31	28	+3
<b>C2</b> social grade (skilled manual)	8	21	-13
<b>DE</b> social grade (unskilled manual/long-term dependent on state benefit)	14	25	-11
<b>16-24</b>	15	13	+2
<b>25-34</b>	22	19	+3
<b>35-44</b>	18	18	0
<b>45-54</b>	17	20	-3
<b>55-75</b>	28	31	-3

\*N.B. these figures are based on the profile of visitors generated by the initial nationally representative sample of 7,730 adults aged over 16 as described above.

The full description of Sizewell C can be found in the questionnaire included as **Appendix 2** of this document. While it is impossible to ascertain the thoroughness with which the information was read, the following measures were taken to encourage participants to complete the survey to the best of their ability:

- An instruction was included to read the information carefully before answering the next question;
- A short delay of ten seconds was built into the questionnaire '*script*' on information pages; and
- As standard, the small number of participants '*straight-lining*' responses (i.e. giving the same answer throughout completion) were removed.

## Questionnaire design and development

The questionnaire consisted of five sections: the first gathered information on past visiting behaviour, the second covered what people like and dislike about the Suffolk coast, the third gather visiting information from those with an intention to visit in the future, the fourth explored the reasons for not revisiting, and the fifth addressed attitudes towards Sizewell sites and explored the perceived effect the construction of Sizewell C might have on visiting behaviour and intention.

Topics covered in the questionnaire:

- Previous visiting behaviour - This section included questions relating to the frequency of visiting, the time of year of the last visit, the purpose of that visit, who they were visiting with, places visited on the trip and why they choose to visit the Suffolk coast.
- Future intention to visit - This section was used to gauge future intention to visit, whether they had already booked accommodation for the trip (if staying overnight), the main purpose of the visit and which places (towns and sites of interests) and activities they were thinking of doing there.
- Lapsed visiting - For those who had said they had visited in the past, but were unlikely/certain not to re-visit, questions were asked about why they did not want to return.
- Tourism - Questions focused on where people get news and information about the Suffolk coast, what they had heard about the Suffolk coast recently, if anything, and whether this had influenced their likelihood to visit in the future.
- Awareness of existing Sizewell sites (A and B) and the proposed construction of Sizewell C - This included a detailed description of elements of the construction phase of Sizewell C.
- A series of questions gathered information on whether and how people thought the proposed Sizewell C development (as described) might affect their visiting behaviour during the construction phase.
- Tourism Fund - Questions about possible measures that a SZC Co. 'Tourism Fund' might include to respond to or pre-empt changes to visitor behaviours. This was designed to provide ideas and direction for use of the fund.

The survey questionnaire was cognitively tested before fieldwork began. This was undertaken to ensure that questions effectively measured the target behaviours and attitudes of interest, were easy to understand, flowed logically and were unbiased.

Participants in the cognitive testing phase were recruited by an external recruiter (Criteria Fieldwork Ltd). They attended Ipsos MORI's offices in London to be observed by members of the Ipsos MORI research team whilst they completed a paper version of the questionnaire. Respondents' reactions to the questions, the visuals and descriptions, and their actions/hesitations were observed and recorded. Participants were also asked how easy/difficult they found answering particular questions and probed on their comprehension in places.

The interview tested the following:

- that all questions were fully understood and were in a logical order;
- that wording of the questions and vocabulary used was appropriate;
- that all instructions and descriptors given on the questionnaire were appropriate, clear and fully understood;
- maps and visuals used were clear;
- the length of the questionnaire (i.e. how long it took to complete); and
- whether the descriptions were succinct and clear.

A total of six interviews were conducted with people who had previously visited Suffolk (a map of the region was included in the screener) and were fairly, likely or certain to visit in the future. Within this group, visiting behaviour varied. Past visits varied from anywhere between a month to more than three years ago, from day or overnight trips. Interviewees were not asked to specify when in the future they thought they would visit.

Half of those recruited were male, and recruits' ages ranged from 30 to 67, all were from ABC1 social grade<sup>1</sup> (grades based on managerial, professional or administrative occupations) and three were educated below degree level or equivalent.

Questionnaire development was also informed by feedback from stakeholders.<sup>2</sup> Together with feedback from cognitive testing, the following changes were incorporated:

- Modifications around the questionnaire's visuals; this was expected as stimuli/visuals were still a work in progress at the stage of testing. To reach the final images, as seen in **Appendix 2** of this document, changes were made to colour contrasting, label sizes and label wording.
- Finalisation of the part of Suffolk we were to show participants (shown in **Figure 2.1** below).
- Modifications to locations to visit/tourist attraction lists.
- Modifications to some sections of text to incorporate changes proposed by stakeholders, including extension of the period of future visits from 12 months to 24 months.
- The addition of logic and routing checks to the screener and beginning of the questionnaire to make sure that respondents could not answer inconsistently.

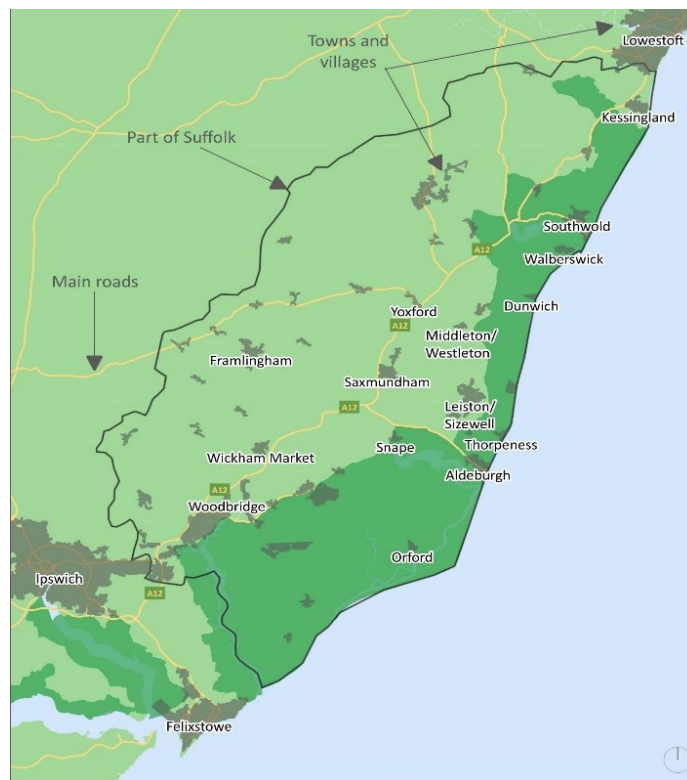
Visuals, including maps and mocked-up images of what the construction site would look like from different viewpoints, were designed and provided by Quod (SZC Co.'s socio-economic consultants for Sizewell C) and SZC Co. (to ensure consistency with visuals presented at public consultation).

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<sup>1</sup> Further information on the social grade classification system is available here: <https://www.mrs.org.uk/resources/social-grade>. Grading is based on the occupation, employment status and qualifications of the Chief Income Earner within each participant's household.

<sup>2</sup> Suffolk County Council, East Suffolk Council, The Suffolk Coast Destination Management Organisation (DMO), National Trust, Visit East Anglia, RSPB, New Anglia Local Enterprise Partnership (NALEP).

**Figure 2.1:** Stimulus A – Area of the Suffolk coast referred to in the questionnaire. An image of this map was presented at several/key questions and otherwise available by hyperlink at questions which asked participants to reflect on their past visiting behaviour to this part of the Suffolk coast or future visits.



### Weighting data

Weighting is the process by which data is adjusted to better reflect the known population profile. A *'weight'* is the percentage assigned to a demographic descriptor. For example, the sample needs to be weighted if the responses show that responses given by a particular group, say young people, are under-or-over-represented in the sample. In cases in which data has not been weighted, it is referred to as *'unweighted data'*.

In the absence of an accurate profile of visitors to the Suffolk coast area, data from the survey in this report are unweighted. However, as described previously, the 7,730 participants who were recruited and took part in the screener survey were selected to be representative of the UK population in terms of age, gender and working status and region.

The survey was not designed to measure or model the impact, financial or otherwise, of the construction of Sizewell C on tourism in Suffolk. Consequently, no *'factors'* have been applied to the data based on visitors' stated likelihood to visit in future (this is a technique sometimes employed to apply greater weight to responses from those with more certain stated intention to visit). As a result, responses given by those who say they are *'certain to visit'* in the next two years carry the same weight as those who say they are only *'fairly likely'* to do so.

## Data interpretation

The purpose of this report is to understand the profile of visitors to the Suffolk coast and their particular sensitivities, especially in terms of visitors to the area immediately around the existing and proposed construction areas, and then how visiting behaviour might change during the construction of Sizewell C based on the information presented to respondents. For this reason, only a subset of the full sample, those who have visited in the past year and/or say they are likely to visit in the next two, were able to answer questions relating to the construction of Sizewell C. Analysis was also conducted on differences in attitudes, perceptions, and drivers of visiting behaviour by visitor characteristics, such as whether someone was a new visitor, in/frequent returner, certain future visitor or overnight/day visitor.

The focus of this report is responses from visitors, i.e. those who have visited the Suffolk coast in the past year and/or are likely to visit in the next two years (3,093 participants). All questions relating to Sizewell C – covered in **Chapter 3** of this report – were answered by all of this group. However, **Chapter 2** reports on opinions given by the particular groups of visitors e.g. those who have ever visited or have done so in the past two years (instead of just one), and those who have stayed overnight during past visits. These are stated during commentary and are also shown underneath all figures and tables.

Throughout the report any variations in opinion between groups of respondents by visiting behaviour, geography or demographic profile are commented upon if the variance is statistically significant (see below) or if the difference is substantial or consistently seen across questions. In cases in which we report on questions with a small sample size/base (less than 50 respondents), caution notes have been included as a reminder that these findings are less reliable as the sub-group is less likely to be normally distributed.

In places where the percentages do not sum to 100, this may be due to computer rounding. If the total is far larger than 100 this will be questions on which respondents were given the option to leave multiple responses. Throughout this report, an asterisk (\*) denotes any value less than half a percent, but greater than zero.

Throughout the report the combined totals for similar answers are shown, for example, 'likely to visit' is the combination of 'certain to visit', 'very likely to visit' and 'fairly likely to visit'. 'Unlikely to visit' is a combination of 'certain not to visit', 'very unlikely to visit' and 'fairly unlikely to visit'. Combinations may or may not sum to their component parts, again owing to rounding.

## Statistical reliability

The results are analysed with regard to significant differences between demographic and geographic groups of respondents. In normal parlance, 'significant' means important, and the term has a specific meaning in the context of Environmental Impact Assessments but in statistical terms, 'significant' means probably true (and not due to chance); a research finding may be true, i.e. 'significantly different' without being important. We use the term 'significant' in this strict statistical sense throughout the report.

To illustrate, the respondents who took part in the survey were a selection of the total population of past/future visitors to the Suffolk coast aged between 16 and 75, taken at a point in time. This means we cannot be certain that the figures obtained would be exactly the same as if we had collected data on everyone who could be interviewed,



i.e. the total population of past/future visitors (the 'true' values). We can, however, estimate the variation between the sample results and the 'true' values, from the relationship between the sample size and the spread of answers given to a particular question. In this case, the confidence with which we can make this prediction is chosen to be 95% - that is, the chances are that the 'true' value will fall within a specified range 95 times out of 100.

It is important to note that, strictly speaking, confidence intervals relate only to samples that have been selected using strict probability sampling methods, that is to say 'random' sampling approaches in which each member of the overall population (in this case, all past/future visitors to this part of the Suffolk coast) has an equal chance of being chosen to take part in the survey. However, in practice, it is reasonable to assume that these calculations provide a good indication of the confidence intervals relating to this survey given the approach used.

**Table 2.2** shows that we can expect an overall sampling tolerance (this refers to the upper and lower limit of error) of +/- 1.8 percentage points at the '95% confidence interval' for the survey overall.

**Table 2.2:** Survey sampling tolerances: overall level

Size of sample on which survey result is based	Approximate Sampling Tolerances Applicable to Percentages At or Near These Levels		
	10% or 90%	30% or 70%	50%
<b>1,000</b>	1.9	2.8	3.1
<b>2,000</b>	1.3	2.0	2.2
<b>3,093</b>	1.1	1.6	1.8

For example, with a sample size of 3,093 where 27% say that they knew at least a little about the proposed construction of Sizewell C before the survey, then the chances are 19 in 20 that the 'true' value (i.e. the one which would have been obtained if the whole population of past/future visitors to this area of the Suffolk coast had been interviewed) will fall within the range of +1.6 percentage points from the survey result (i.e. between 28.6% and 25.4%).

The following table indicates the sampling tolerances when comparing different groups of participants. If we once again assume a '95% confidence interval', the differences between the results of two separate groups must be greater than the values given in the following table in order to be deemed 'statistically significant':

**Table 2.3:** Survey sampling tolerances: sub-group level

Size of sample on which survey result is based	Differences Required for Significance At or Near These Percentage Levels		
	10% or 90%	30% or 70%	50%
<b>396 vs. 896 (those more likely to visit vs. less likely to visit after learning about Sizewell C)</b>	3.6	5.4	5.9
<b>1,585 vs. 1,499 (males vs. females, unweighted)</b>	2.1	3.2	3.5

For example, if 30% of men give a particular answer compared with 34% of women (assuming sample sizes in the **Table 2.3**), then the chances are 19 in 20 that this four-point difference is significant (as the difference is more than 3.2 percentage points).

### Data Publication

As with all our studies, any press release or publication of the findings of this survey requires the advance approval of Ipsos MORI. This would only be refused on the grounds of inaccuracy or misinterpretation of the findings.

### Acknowledgements

Ipsos MORI would like to thank the 7,730 people who took the time to participate in the survey.

## **2. Visiting the Suffolk coast**

## 2. Visiting the Suffolk coast

This chapter reports findings relating to visitor behaviour on the Suffolk coast. Its focus is those who have visited the area in the last year, or intend to visit in the next two years, and explores their typical patterns of visiting.

Participants were initially asked whether they had visited the Suffolk coast. Those who had visited in the past year were asked questions relating to the length and frequency of their visits, as well as questions regarding the nature and purpose of their visits and how they travelled to and around the area.

### Who visits the Suffolk coast?

Among the nationally representative sample (7,730), a third (33%) say they have ever visited the Suffolk coast (illustrated earlier in **Figure 2.1**). A small proportion, 1%, permanently live in this area.

Those who live closest to the area are most likely to say that they have visited: two thirds (67%) of those living in the East of England, 42% of those living in London, and 39% of those living in the East Midlands have done so. This compares to 23% of those living in the North West, 21% in Scotland, and 14% of those living in Northern Ireland.

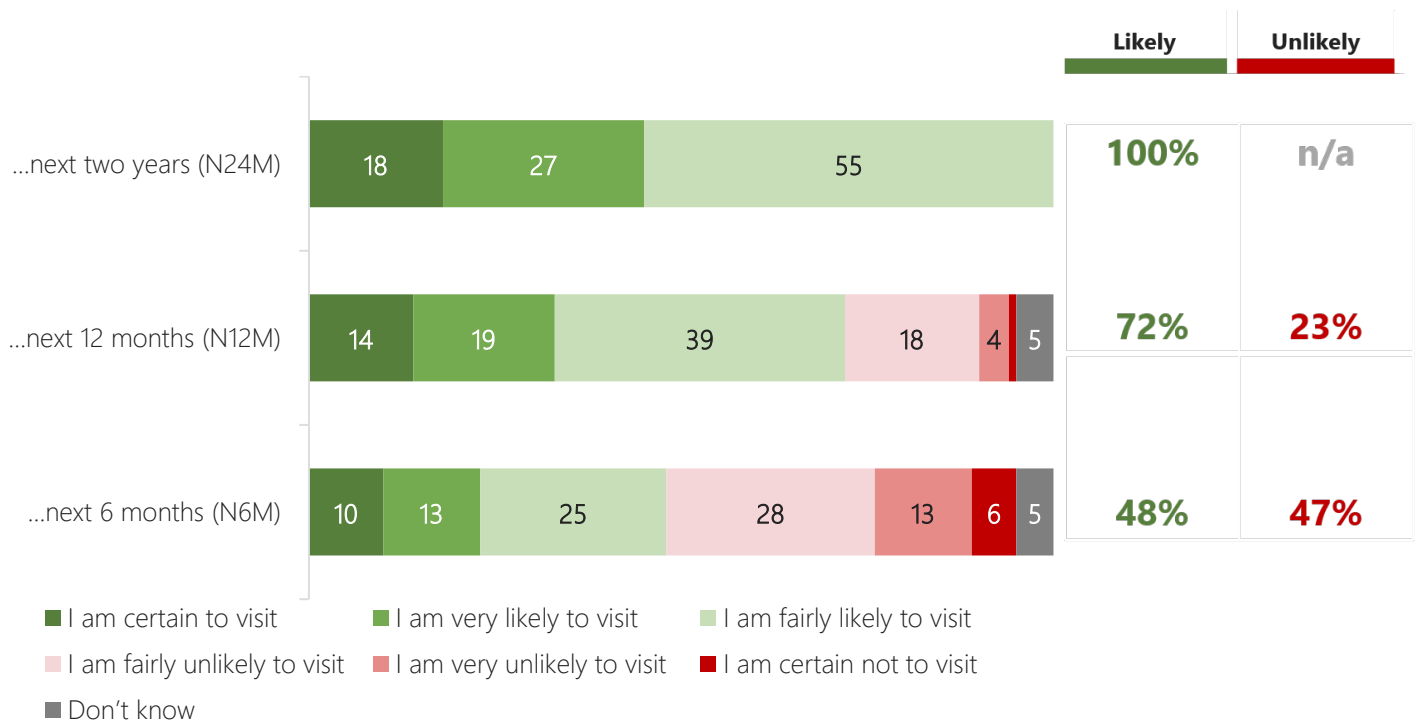
In terms of social grade, those who fall into higher (professional and managerial) social grades are more likely to have visited the area: 61% of those in social grades AB have visited the area, compared to 57% of C1s, 50% of C2s and 45% of those in DE households.

Those who frequently take holidays within the UK (in areas away from home) are more likely to have visited the area than those who do not take domestic holidays/those who do so less often. More than two in five (44%) of those who take domestic holidays several times a year have visited the area, compared to 30% of those who do so annually, and just one in five (21%) of those who take domestic holidays less frequently than once a year.

At the initial screening stage of the questionnaire, among those who have ever visited the area (2,788 participants), just under half (49%) say they had visited in the previous two years, and more than a third (36%) had visited in the past year, representing 13% of all past visitors. About four in ten (39%) say they are certain or likely to visit the area in the next two years (3,034), 72% are likely to visit in the next year. Half (48%) are likely to visit in the next 6 months. Those who had visited less recently than in the past year, and who said they are unlikely to visit again in the next two years, were screened out at this stage.

People living in regions close to the area are more likely to say they intend to visit in the next two years than those living in other regions; for example, two-thirds (66%) of people in the East of England are certain or likely to visit in the next two years, compared to less than a third of those in Northern Ireland (29%) and Scotland (23%).

**Figure 3.1** – S8/8a (of the Suffolk Visitors Survey). You have said that you think you are likely or certain to visit in the next 2 years. How likely or unlikely do you think you are to visit there in...?



Base: All adults aged 16-75 in the UK (7,730)/who say they are certain/likely to visit in the next two years (3,034)

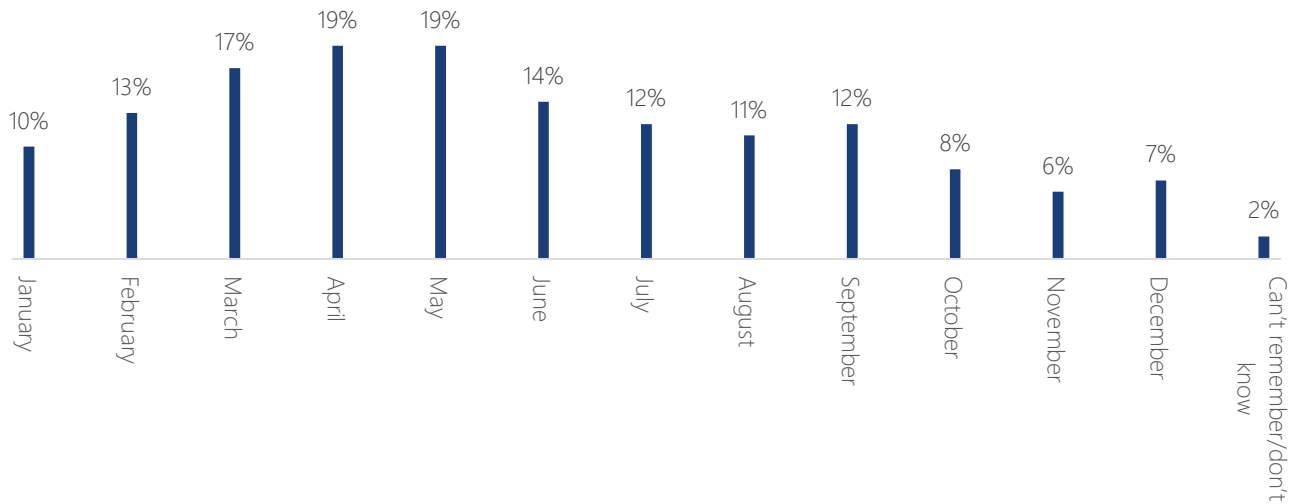
### Past Visiting Patterns

A series of questions were asked to understand more about how frequently people visited the area, modes of transport used to get there, the duration of their visits, who they travelled with on their most recent visit and what attracts them to visiting this part of the Suffolk coast.

Those who had visited in the past year (1,030) were asked specifically about their most recent visit. Bearing in mind survey fieldwork took place during June-July, most recent visits range across on and off-peak times of year, although a higher proportion of most recent visits took place during the spring and summer months rather than the winter period. Visiting peaked during April and May. Around half as many said that their most recent trip was between October and December.

Visiting Suffolk in August was significantly more common among 45-54 year olds; 19% say their most recent visit was in this month compared to the average 9% across other age groups. Travelling in June was most common among older adults (55-75 years old) – with 22% visiting at this time of year compared to the 14% average across other age groups). The main purpose of these visits was either for leisure (45%) or holiday (37%). A smaller proportion (17%) report that their most recent visit was to see family or for other personal reasons.

**Figure 3.2** – Q3. Still thinking about the last time, you visited this part of Suffolk, in which months of the year were you there?



Base: All who have visited in the last 12 months (1,030)

One in five (19%) say they visited alone. Almost two-thirds (64%) visited with one other person, with the remainder visiting in a group of three or more. Fewer than half (46%) say they visited with children. On average, people's last visit was among a party of 2.28 adults and 0.73 children.

Among those who visited with children aged 16 or below (438 visitors), over four in five (84%) visited with children of school age. Of those with children of school age (numbering 370), visiting Suffolk outside term-time was more common than visiting during it (56% outside term-time against 42% during term-time). Those who had visited with child(ren) present were more likely to report holiday-making as the reason for their visit (45%) than those who visited without children (30%). Conversely, those without children were more likely to report leisure/a short break or 'day out' as the purpose of their last visit (51%) compared to those who visited with children (38%).

Those visiting the area typically stay overnight or longer. Four in five (79%) stayed for one or more nights on their most recent visit, though visitors from the East of England were significantly less likely to have stayed overnight than those from other regions (52% compared to an average 89% for all other regions). Over half (61%) of these overnight visitors (base: 809) stayed for three nights or more. There is the strongest preference for overnight stays among younger visitors - with 84% of those aged 44 years or under saying that they stayed for at least one night. Nine in ten (90%) of those who travelled longer than 2 hours, stayed for at least one night compared to seven in ten (68%) of those whose journey was less than two hours.

Overnight visitors stay in a range of accommodation types. Hotel accommodation is the most popular with two in five saying they stayed in a hotel in Suffolk. Guesthouses/bed and breakfast accommodation were the next most common (22%), with a similar proportion staying in either their own holiday home/property (10%), a self-catering holiday cottage/apartment (14%), Airbnb (11%), or with friends/relatives (12%). Smaller proportions stayed in camping sites, caravans, and boats (each less than 4%). Those visiting with children were more likely to stay in a hotel than those visiting without children (48% with children vs 32% without children).

Those who had visited in the last 12 months, were most likely to have stayed in Ipswich (18%) or Lowestoft (also 18%). Aldeburgh, Felixstowe and Southwold were the joint second-most popular places to stay with each town receiving 12% of overnight visitors.

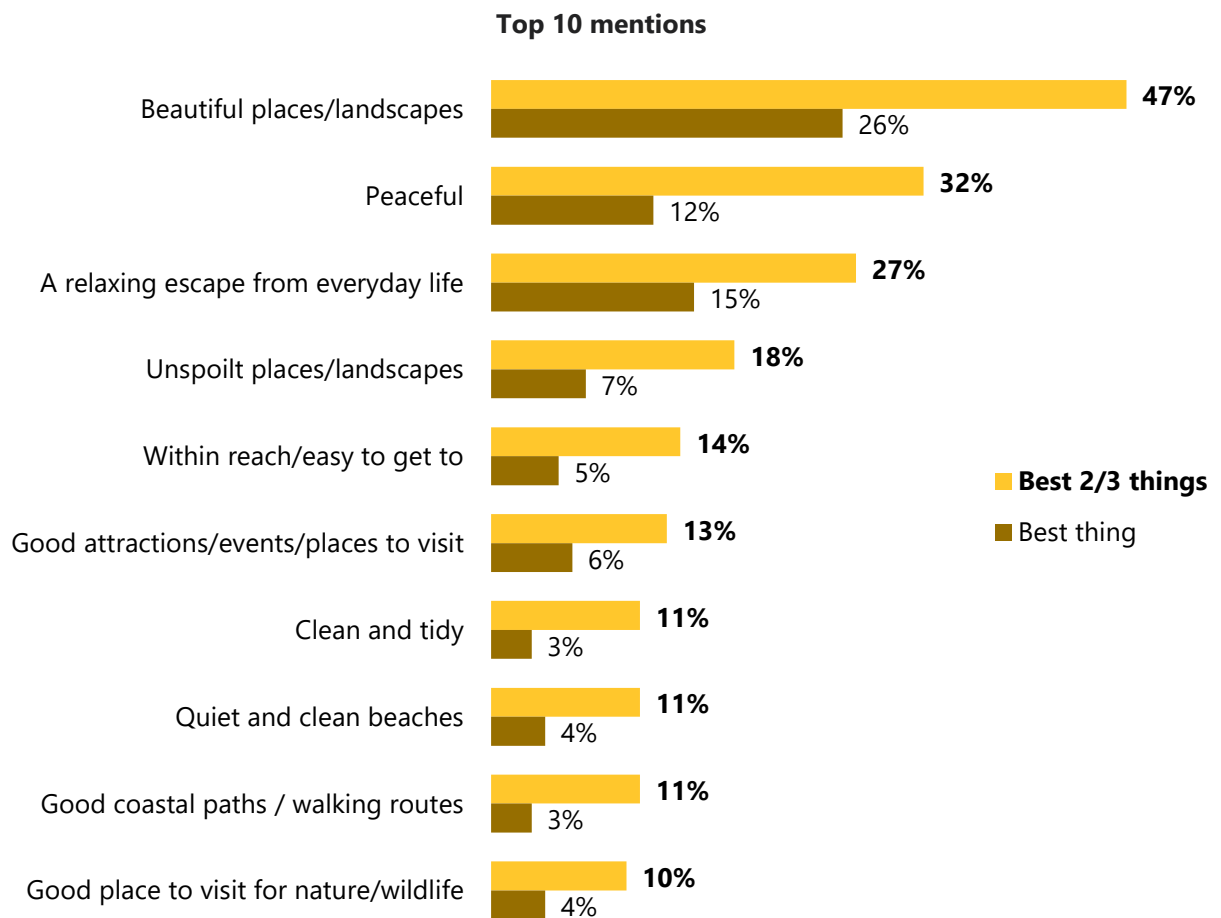
Car travel was the primary means of making journeys to the area. Nine in ten (91%) visitors in the past 12 months travelled to and from the coastal area of interest by car, either as a driver or passenger in an owned, borrowed or rented car. The remainder mainly travelled by train (7%), bus/coach (4%) or taxi (2%).

A third (34%) of visitors had a journey of less than 2 hours, a fifth (20%) had a journey of between 2 and 3 hours, and a further fifth (22%) had a journey of over 3 hours. Friday is by far the most popular day to come to the area, with over a quarter (29%) of visitors travelling to the area on a Friday on their most recent visit. Visitors tend to arrive during the day rather than in the evening (79% arrived during the day compared to 17% in the evening). Visitors tended to travel at the time of day they did because it is quieter (40%) or because it fits with other commitments such as work or school (31%).

### Why do people visit this part of Suffolk?

Those who had visited this part of Suffolk in the last 12 months were asked to select from a list everything they liked about their visit and what was worst about it. The Suffolk coast is clearly an area visited for its '*beautiful places/landscapes*' – as shown in **Figure 3.3**, nearly half (47%) choose this as one of the best things about it, and 26% consider it the best thing. The area is also identified as somewhere that is '*unspoilt*' (18%), '*peaceful*' (32%) or '*relaxing*' (27%). Smaller numbers of respondents select other things including it being easy to get to (14%), its cleanliness (11%), and the good coastal paths/walking routes (11%).

**Figure 3.3 - Q17.** Thinking about your last visit to this part of Suffolk, which of these, if any, were the BEST two or three things about it? Q17a. And which one of these, if any, was the best thing about it?

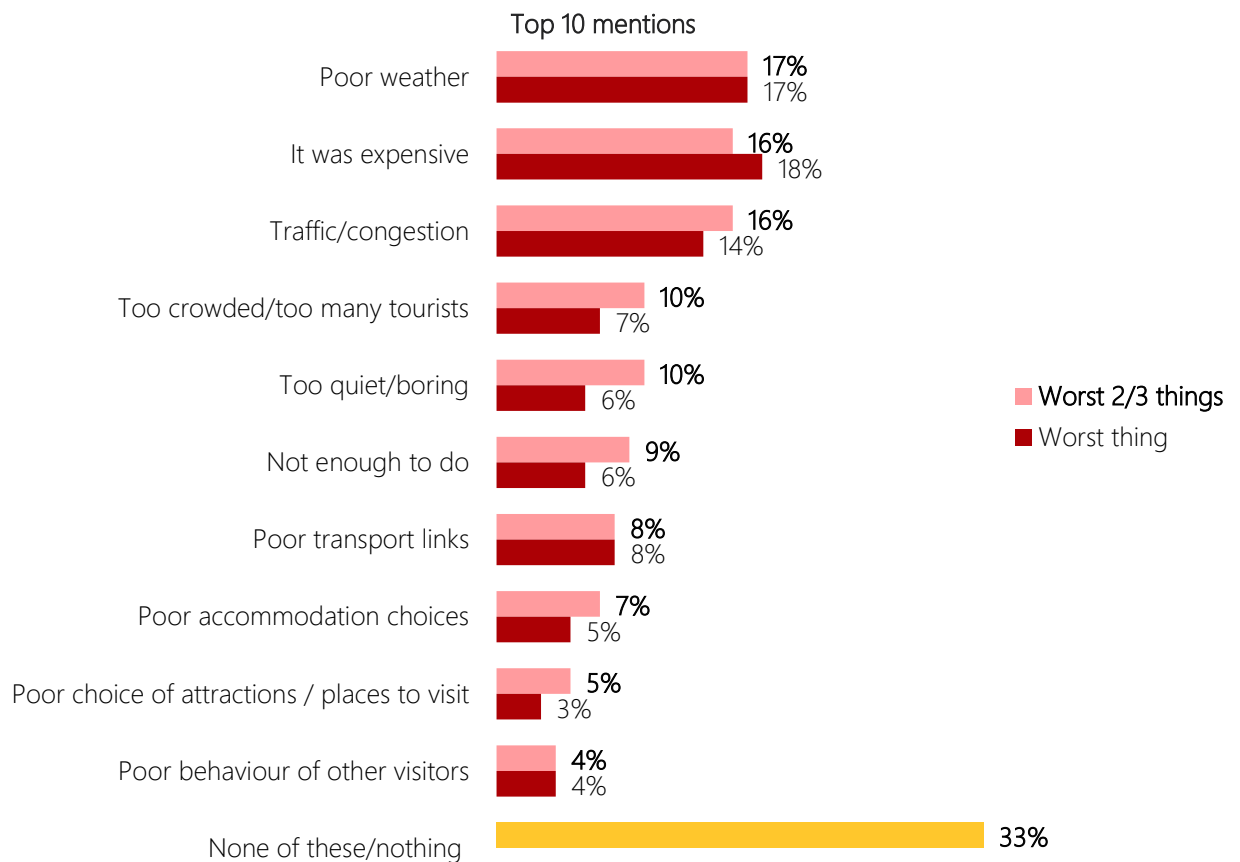


Base: Q17. All adults aged 16-75 in the UK who have visited in the last 12 months (1030); Q17a. Base: All adults aged 16-75 in the UK who have visited and who selected more than one best thing (869)

As shown in **Figure 3.4**, those who had visited in the past 12 months choose cost and poor traffic/congestion or parking from a list of 'worst' things. The area being expensive (18%) is most likely to be viewed as the worse thing about their last visit. However, many found it difficult to be negative about the area; a third (33%) saying that there was nothing negative they could say about the place.



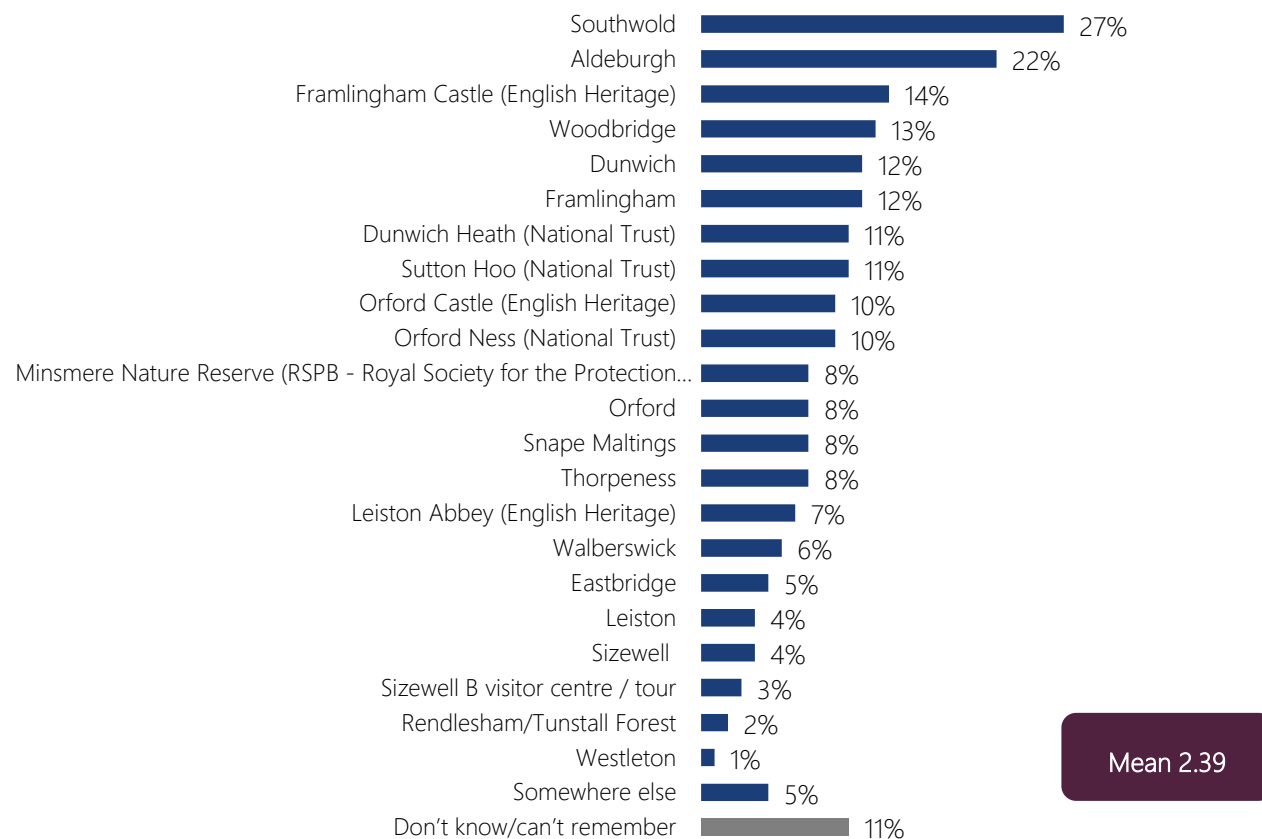
**Figure 3.4 – Q18.** Thinking about your last visit, which of these, if any, were the WORST two or three things about it? Q18a. And which one of these, if any, was the worst thing about it?



Base: Q18. Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030); Q18a. Base: All adults aged 16-75 in the UK who have visited and who selected more than one worst thing (362)

When asked where in Suffolk they had visited on their most recent trip, just over a quarter report having visited Southwold (27%), followed by Aldeburgh (22%) and Framlingham Castle (14%). Visitors from the North East were more likely to have visited Orford Castle (21%), while those from the South West mentioned visiting Woodbridge (19%) more than other regions, and Thorpeness was relatively more popular among Scottish visitors (16%). Potential visitors living in the East of England were more likely to have previously visited Southwold and Aldeburgh.

**Figure 3.5 – Q19.** Here is a list of places you may have visited or spent time at in Suffolk. Thinking about your last visit, which, if any, of the following places did you visit?



Base: All adults aged 16-75 in the UK who have visited or live in Suffolk that have visited in the past 12 months or likely to visit in the next two years (1816)

Past visitors were also asked about the things they, or people they were visiting with, did while visiting. Almost half selected walking from the list provided (48%), with similar proportions recalling eating/drinking out (46%), and exploring local towns/villages (45%) as activities they had undertaken on their most recent visit. Other popular activities included 'enjoying the landscape' (36%), driving around and sightseeing from the car (28%), and appreciating the local history/heritage (29%).

Eating/drinking out was more popular among older visitors, with over half of over 45 years old identifying this activity as something they did on their last visit, compared to around a third of those aged 34 or younger. Physical activities such as cycling or swimming in the sea were more commonly done by younger age groups: 17% of 16-24 year olds went cycling on their most recent visit, compared to 3% of over-55s.

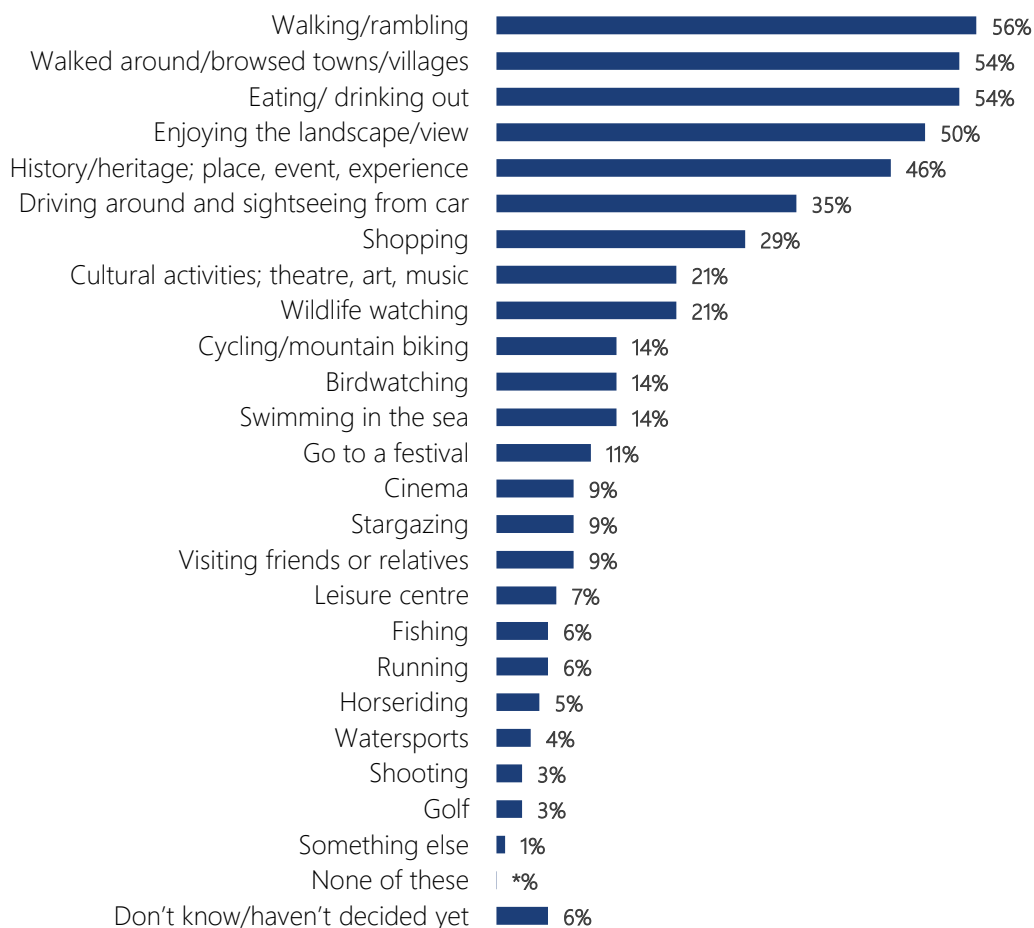
Adults visiting with children were more likely to have done more active activities such as cycling (15% compared to 6% for those on an adults-only trips), running and swimming in the sea, whereas adults visiting without children were more likely to have enjoyed the landscape/view (42% compared to 28% for those visiting with children) and to have browsed local towns/villages (52% compared to 34% among those without children).

### What do people plan to do on their visits?

Almost all potential visitors say that holidaymaking or leisure/recreation would be the purpose of their upcoming trip – shown in **Figure 3.6**. Only 14% give other reasons such as visiting family or attending events. The vast majority think they would stay for at least a night (82%), and when asked to be more specific, the most common answer given was two nights.

When asked which places and activities they were likely to visit/undertake on their next trip, heritage and National Trust locations such as Framlingham Castle (26%), Orford Castle (22%) and Sutton Hoo (20%) were key attractions, though other locations were also popular. Potential future visitors thought they were most likely to go walking/rambling around towns or in open spaces and visit local heritage/historical sites. Other activities mentioned included '*cultural activities*' such as theatre, art or music (21%), wildlife watching (also 21%), and birdwatching (14%). This is likely to reflect high levels of membership of the National Trust (25%), English Heritage (11%) and Royal Society for the Protection of Birds (RSPB) (9%).

**Figure 3.6** – Q32. And which, if any, of these things do you think you or someone visiting with you will do when visiting this part of Suffolk in the next two years?



Base: All adults aged 16-75 in the UK who are certain or likely to visit in the next two years (3034)

Those who had visited the area of Suffolk previously but indicated that they were unlikely or certain not to visit the area again gave a range of reasons for not intending to visit in future. The number of participants we sampled who

fitted into this group was small, just 44, and their reasoning primarily related to it either being too far away or wanting to see new places.

### Sources of information about the Suffolk coast

Past and potential visitors were asked to indicate which sources they use to get news and information about Suffolk. The internet is the most common source of information. With around a third using national websites, such as TripAdvisor or Booking.com (35%), and/or local websites, such as the Suffolkcoast.co.uk (33%). Websites are closely followed by family and friends (30%) as a popular source of information.

Visitors are similar in their use of online (22%) and offline sources (20%). National sources are slightly more popular than local sources (43% vs 39%).

**Figure 3.7** - Q36. Generally, from which, if any, sources do you get news about, hear about or find out about Suffolk?



Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

Those living in the East of England are more likely than visitors as a whole to say they use local newspapers (11% against 6% average) or local TV/radio (9% compared to 5% average). Those living more than two hours' drive from Suffolk are most likely to hear about Suffolk through word of mouth (37% compared to the 30% sample average). This is also the case for those who have visited the area a lot (20 times or more), with just over half (53%) obtaining information this way. Frequent visitors are also more reliant on local newspapers (10% for 6-20 times visitors and 18% for 20+ visitors).

Those who had visited one of Suffolk's nature reserves in the past, or intend to visit one in the future, use more sources of information than visitors as a whole (2.93 compared to the average 2.51). So too do the most frequent

visitors (those who have visited more than 20 times), who on average use three sources. Those who have recently heard something in the news about Suffolk are also likely to use more sources (3.56).

## 3. Sizewell C

## 3. Sizewell C

This chapter focuses on the findings generated by questions relating to the proposed development of Sizewell C and potential changes to visitor behaviour. The questions shown here were asked of the full sample of past/potential visitors i.e. those who said they had visited the part of the Suffolk coast in the past 12 months or were likely to visit within the next two years (3,093 participants).

As described previously, 1,030 (33%) of this group said they had visited this area of the Suffolk coast in the past 12 months while 43% of them have not previously visited the Suffolk coast (but are either fairly likely, very likely or certain to visit in the next 24 months). A quarter are members of the National Trust (25%) and around one in ten of English Heritage and RSPB (11% and 9% respectively); likely reflecting several visitor attractions and sites of interest to members of these organisations within the Suffolk coast area.

### Effect of News Stories on Likelihood To Visit

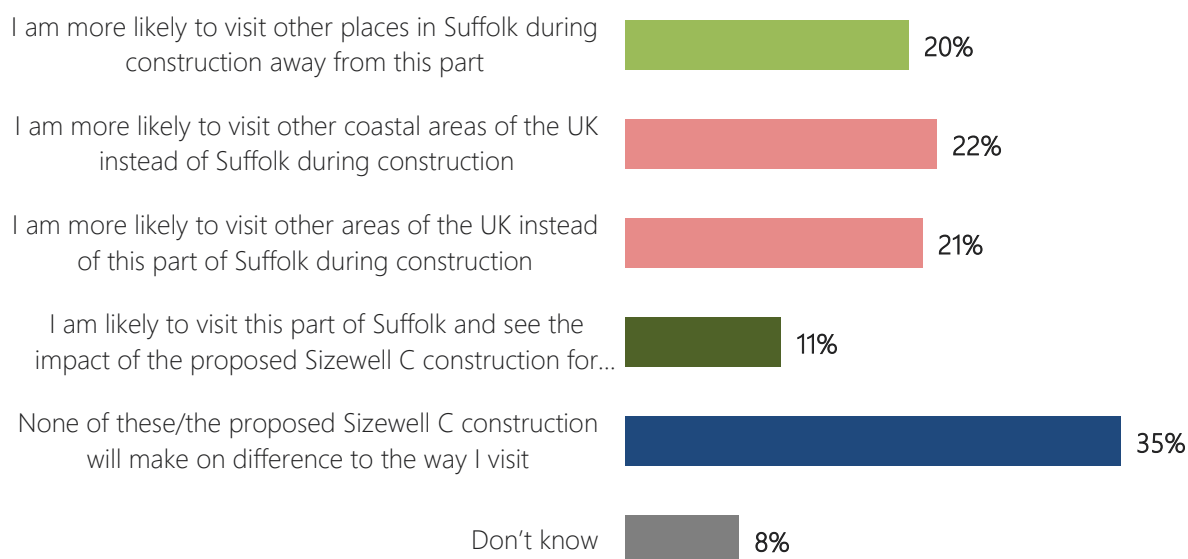
The vast majority, 92%, of past and potential visitors say they have not heard any specific news relating to this area of the Suffolk coast, and a further 5% say they do not know. The only noteworthy regional difference is for past/potential visitors based in the East of England. Here, 7% of people reported hearing something about this part of Suffolk (compared to 3% of visitors nationwide).

This question was designed, in part, to measure spontaneous awareness of Sizewell C as a local news story, with those who had heard something asked to provide details about what the news story was about (78 participants). Sizewell C or the construction of a new power plant were spontaneously mentioned the most (25 mentions), meaning that, overall, 1% of visitors spontaneously mention Sizewell C as a recent news story relating to this part of Suffolk. Some of the other news stories mentioned included:

- Land deformation e.g. coastal erosion, sink holes and sea encroachment (seven mentions).
- Criminal offences e.g. muggings, attacks and road accidents (six mentions).
- Festivals including Aldeburgh Festival, Snape music festival and Latitude (five mentions).

Of those who had heard a news story, nearly six in ten (58%) said that it had not changed their views about visiting this part of Suffolk. One in ten thought the news story had had a negative influence their likelihood to visit, with 6% saying they were a '*little less likely*' and 3% being '*much less likely*' to visit. In a third of cases the story positively influenced their likelihood to visit; 15% said that the story had made them much more likely to visit, 17% a little more likely.

**Figure 4.1 – Q44.** Here are some more ways in which construction of the proposed new nuclear power station – Sizewell C – might change the way you visit this part of Suffolk in the future, or it might make no difference to you.



Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

### Awareness of Existing Sizewell Sites

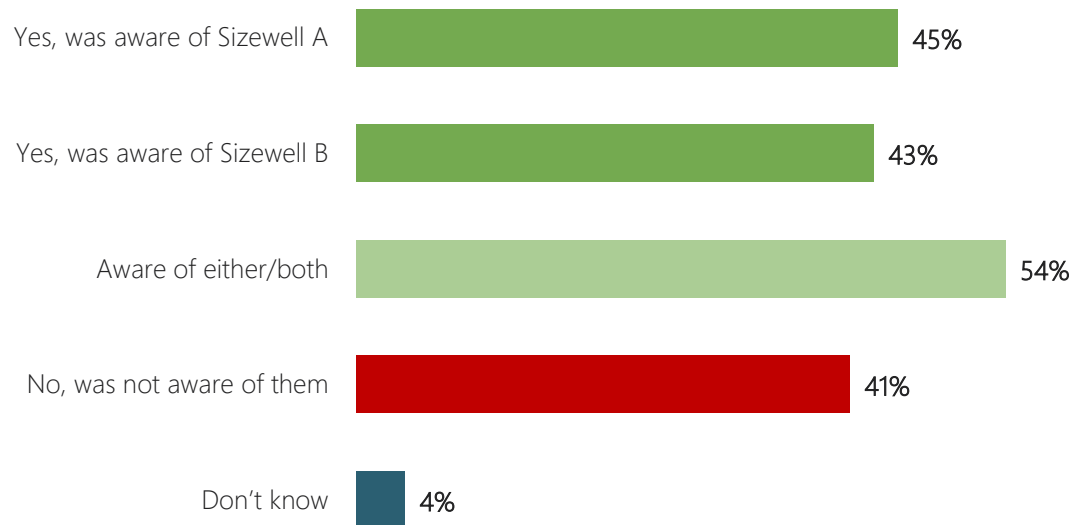
Overall, just over half (55%) of past and potential visitors say they were aware of at least one of the two Sizewell sites before taking part in the survey; 45% say they were aware of Sizewell A and 43% of Sizewell B. A similar proportion, 41%, were not aware of either site, with 4% saying they did not know.

Awareness of existing sites is significantly higher than average in the East of England; 66% for Sizewell A and 67% for Sizewell B. Awareness of Sizewell sites increased with the frequency of visits to the Suffolk coast. For example, among those who have visited the Suffolk coast the most (more than 20 times) only 6% were unaware of either site. In contrast, 45% of single occasion visitors said they were unaware.

Past visitors who visited Minsmere nature reserve on their last visit were significantly more likely to be aware of Sizewell B than those who have visited Dunwich Heath on their last visit (65% versus 54%).



**Figure 4.2** – Q40. Now on a different topic, before taking part in this online survey today, were you aware or not of the existing Sizewell A and B nuclear power plants on the Suffolk coast?



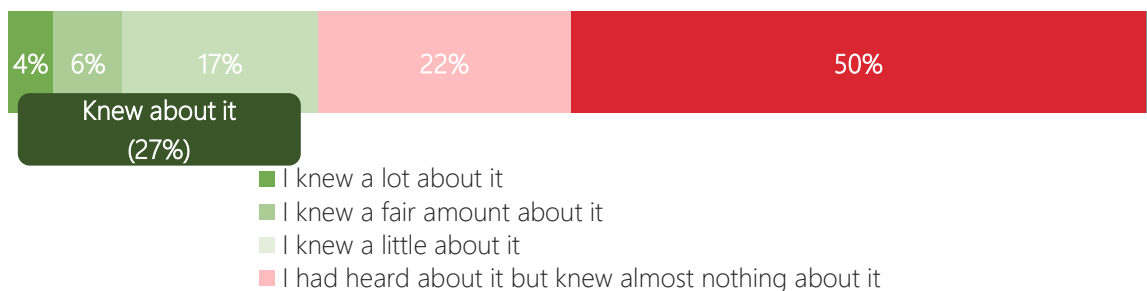
Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

## Knowledge of the proposed development of Sizewell C

Past/potential future visitors to the Suffolk coast were asked to read a description of the proposed new nuclear power station development. This included a map of the site for Sizewell C, a description of how the current land would be used during construction, when construction is expected to start, the estimated construction phase, and the potential effect on traffic, noise and views. The description was illustrated with supporting images. A full copy of the description can be found in **Appendix 2** of this document.

Overall there are low levels of awareness; half, 50%, say they have never heard of it. A further fifth, 22%, say they had heard something about it, but know almost nothing. Only one in ten are confident in their knowledge; saying they know a lot (4%) or a fair amount (6%) about the proposed construction of Sizewell C.

**Figure 4.3** - Q41. Before taking part in this online survey today and reading the description, to what extent were you familiar, or not, with the proposed construction of a new nuclear power station – Sizewell C? Before this survey...



Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

In line with awareness of existing Sizewell sites, those living in the East of England are significantly more likely to have heard of or know about the proposed construction of Sizewell C (64%). Those who are aware of the existing Sizewell sites are also more likely to know about the potential new development. Close to three-quarters of this group (72%) say they have either heard of or know about the proposed construction of Sizewell C, compared with less than a quarter (23%) of those with no prior knowledge of Sizewell A or B.

Those who have visited the Suffolk coast more often are more likely to know about the proposed development too. Of those who have visited over twenty times, exactly eight in ten (80%) say they have at least heard about the proposed construction of Sizewell C. This is significantly different to those who have visited more than six but fewer than 20 times, among whom seven in ten (68%) say they have at least heard about it.

Among those who have visited more than once but fewer than five times, 60% have at least heard of the proposed development, falling to half (50%) who have only visited this area of the Suffolk coast once before. Similarly, knowledge was higher among those who had visited in the past 12 months and were certain to visit again in the next 24 months, and those who had confirmed or were about to confirm their booking for their next trip, 16% and 28% respectively saying they knew a lot about the proposed construction of Sizewell C.

Those who had visited one of Suffolk's nature reserves on their last visit were significantly more likely than visitors overall to say they had heard about or know about Sizewell C. Knowledge is greatest among those who visited Dunwich Heath on their last visit, 74% of whom say they knew or had heard about the proposed construction, and 13% saying they know a lot about it.

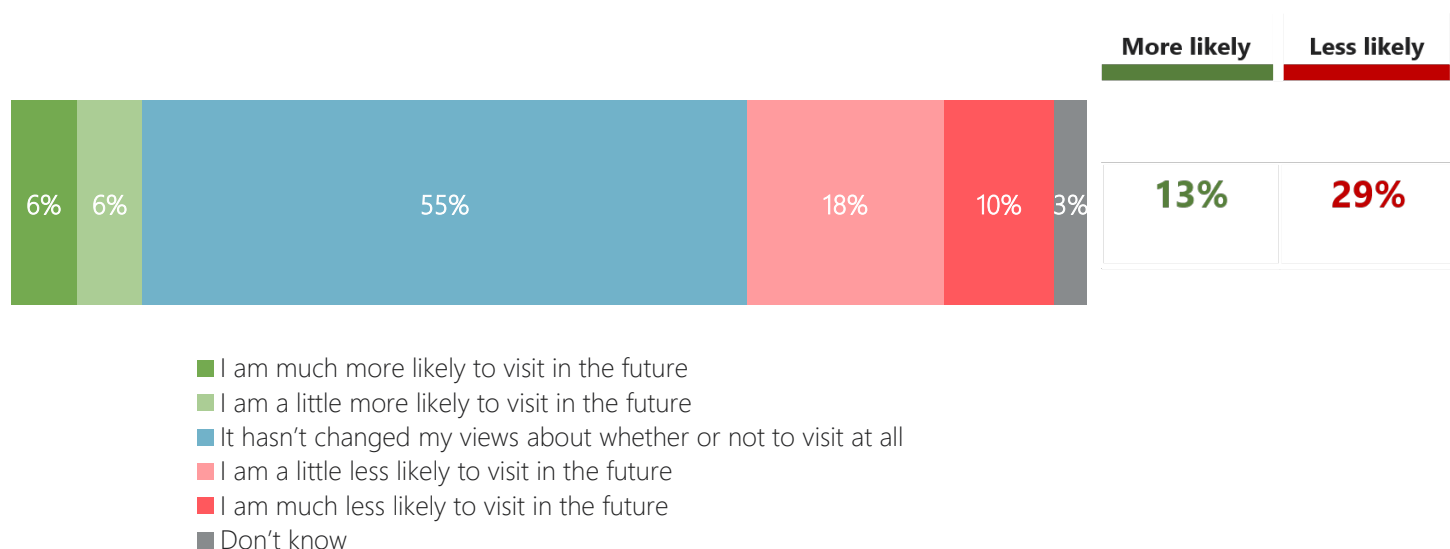
## Likelihood to visit

After reading the description, participants were asked a series of questions based on the information, covering:

- their intention to visit the Suffolk coast in the future (Q42);
- their expected frequency of future visits (Q43); and
- their expectations about the way in which they would visit (Q44 and Q45).

Overall, three in ten visitors (29%) expect the construction, as described, to make them a lot or a little less likely to visit, while one in ten (13%) expect it to make them a lot or a little more likely to visit. The majority say the description has not changed their likelihood to visit or not (55%).

**Figure 4.4** - Q42. Having read the description of the construction of the proposed new nuclear power station – Sizewell C, would you say that this has changed your views about whether or not to visit the area of Suffolk shown in Map B in the future?



Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

A greater proportion of past and/or potential visitors from the South East of England say they are less likely to visit this area of the Suffolk coast in the future (36%) compared with visitors overall (29%). By comparison, those from the East Midlands, East of England and the South West were more likely to say that the description has not changed their views about whether or not to visit – 64%, 65% and 59% respectively thinking it would make no difference.

Previous visitors were, relatively speaking, less likely to respond negatively to the description of the proposed construction of Sizewell C. For example, among previous visitors who stayed overnight somewhere away from home on their last trip to the Suffolk coast, one in four (25%) said they were more likely to visit in future after reading the description compared with 13% overall. Nearly two-thirds (64%) of those who did not stay overnight said the proposed construction had not changed their views about whether or not to visit at all.

Older visitors tend to be less negative about their likelihood to visit this area of the Suffolk coast in the future compared with younger visitors. Around two-thirds of 45 to 54 and 55 to 75-year olds (65% and 68% respectively) say the description has not changed their views about whether or not to visit in future, falling to 42% of 16 to 24-year olds and 43% of 25 to 34-year olds.

Visitors who went to a nature reserve on their last visit and/or who intend to visit in the next two years are slightly above average in saying they are less likely to visit in future (34% compared to 29% across all visitors), though are as likely as visitors overall to say they are more likely to visit. Those who have visited an 'inner area' on their last visit (defined as Aldeburgh, Dunwich, Dunwich Heath, Eastbridge, Leiston Abbey, Leiston, Minsmere nature reserve, Sizewell B visitors centre, Sizewell, Snape Maltings, Thorpeness and Westleton) are more likely than those who did not, to say that they are more likely to visit.

**Table 4.1** and **Table 4.2** below present differences by some demographic and visitor groups of interest.

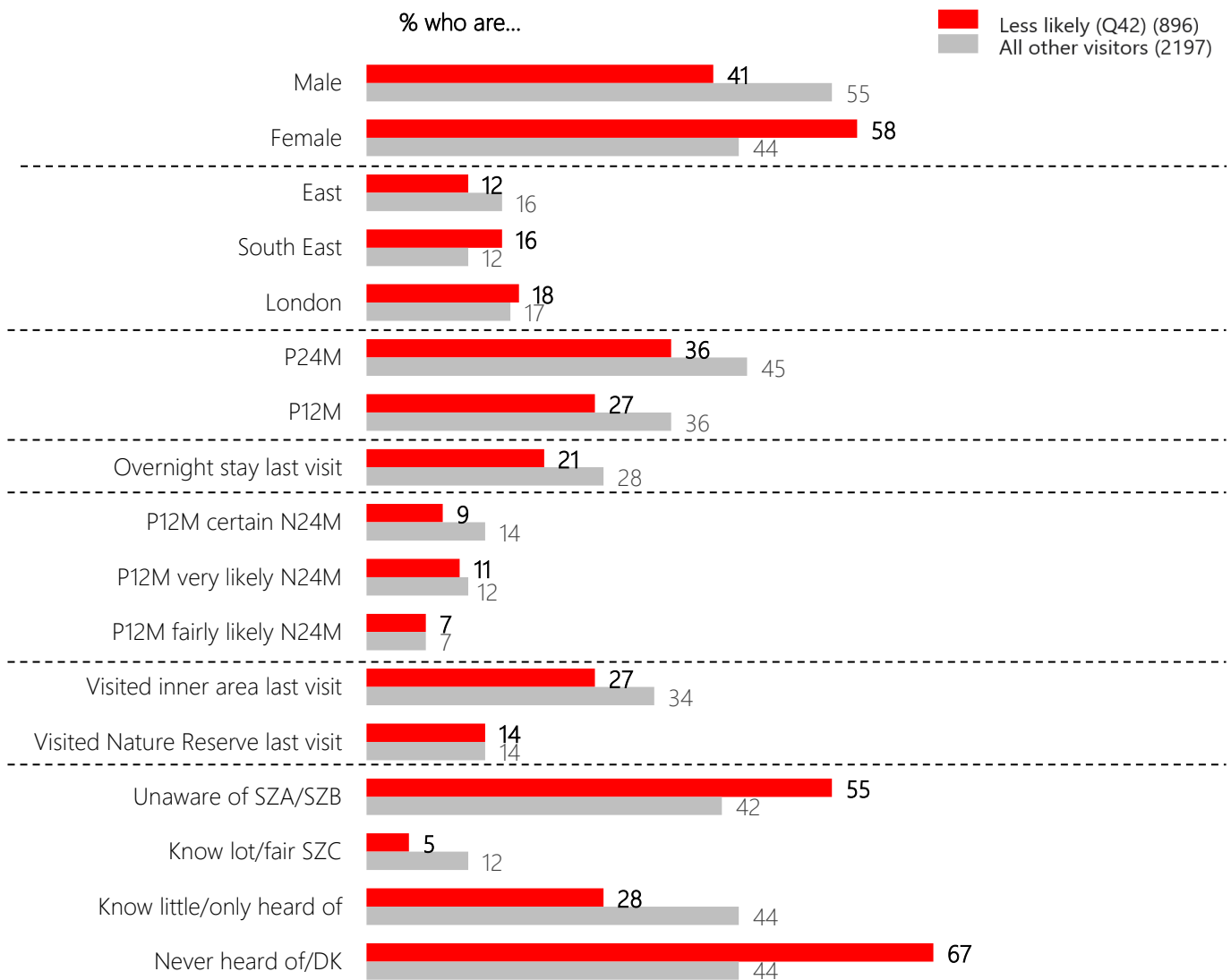
### Who are 'less likely' to visit?

**Table 4.1** – Changes in likelihood to visit the area in the future (Q42), by key demographics.

	% More Likely to Visit	% Less Likely to Visit	% Hasn't Changed Views
<b>All</b>	<b>13</b>	<b>29</b>	<b>55</b>
Men (1,585)	15	23	59
Women (1,499)	10	<b>35</b>	51
16-24 (476)	20	30	42
25-34 (668)	23	31	43
35-44 (565)	13	28	52
45-54 (526)	5	24	65
55-75 (858)	5	30	53
Social grades AB (1,461)	15	28	58
Social grade C1 (948)	10	28	58
Social grade C2 (258)	11	29	59
Social grades DE (426)	11	32	54
<b>Visiting behaviour</b>			
Booked/confirmed (184)	45	20	34
Visited P24M (1,307)	19	24	55
Visited P12M (1,030)	22	23	52
P12M certain N24M (383)	24	20	54
P12M very likely N24M (356)	26	28	44
P12M fairly likely N24M (206)	11	29	57
Visited inner area last visit (983)	20	25	54
Did not visit inner area last visit (636)	9	27	61
<b>Prior awareness of Sizewell A/Sizewell B</b>			
Aware (1,681)	15	24	60
Unaware (1,412)	10	<b>35</b>	49
<b>Prior knowledge of Sizewell C</b>			
Great deal/fair amount (305)	51	15	33
A little/only heard of (1,217)	12	21	65
Never heard of/DK (1,571)	6	<b>38</b>	51
<b>Visited on their last trip to the Suffolk coast</b>			
Minsmere (141)	14	27	58
Dunwich Heath (193)	23	28	47
Any nature reserve (430)	17	30	52

Base: All who have visited in the last year and/or likely to visit in the next two (3,093)

**Figure 4.5** below profiles those who had said they were '*much less likely*' to visit combined with those '*a little less likely to visit*' (896 participants) compared to all other past/potential visitors (2,197 participants).

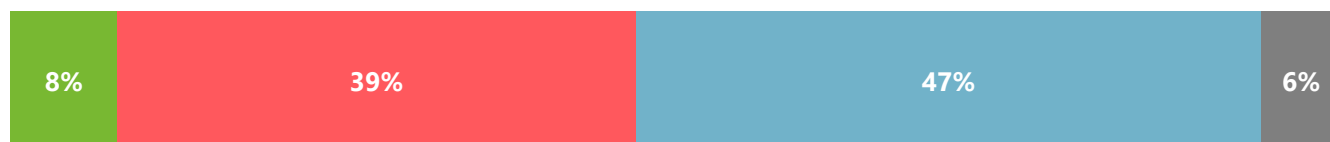
**Figure 4.5.** Profile of those who are much and a little less likely to visit

Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

Inner area = Aldeburgh, Dunwich, Dunwich Heath, Eastbridge, Leiston Abbey, Leiston, Minsmere nature reserve, Sizewell B visitors centre, Sizewell, Snape Maltings, Thorpeness, Westleton

A further question was asked to collect expected changes in the frequency of visiting the Suffolk coast. Again, the largest proportion of visitors, 47%, think that the proposed construction will make no difference to how often they visit this part of Suffolk. Two in five (39%) say they are likely to visit less often during construction, while 8% say they are likely to visit more often during construction.

**Figure 4.6** – Q43. Here are some possible ways in which construction of the proposed new nuclear power station – Sizewell C- might change how often or not you visit this part of Suffolk in the future, or it might make no difference to you. Please select all that apply.



- I am likely to visit more often during construction
- I am likely to visit less often during construction
- None of these/the proposed Sizewell C construction will make no difference to how often I visit
- Don't know

Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

Younger adults (those aged 16-24) are most likely to say that they would visit less often during the construction phase (51% vs 39% on average). Over half of 45 to 54-year olds (55%) and 55 to 75-year olds (62%) say that the construction of Sizewell C would have no difference on how often they visit.

Visitors from the East Midlands and the East of England are relatively more likely to say that the construction would make no difference to the frequency of their visits (55% and 58% respectively) while in all other regions around two in five say they expect to visit less often.

Those who have visited the area multiple (six or more) times are more likely to say that the construction would make no difference to how frequently they travel to the Suffolk coast. For instance, six in ten (59%) visitors who have been to the area between 6-20 times think it will have no effect, a proportion which rises to seven in ten (69%) of those who have visited more than 20 times. For this latter group, news of the planned construction made a comparatively smaller impression; 28% said they anticipated visiting less, 10 percentage points lower than average.

More visitors who stayed overnight on their last visit to the Suffolk coast say that they are likely to visit more often during construction (20%) than those who did not stay overnight (6%). However, similar proportions in each group - overnight stayers and day trippers - say they are less likely to visit during construction (34% and 35% respectively).

Approaching half (45%) of visitors who had either been to Minsmere or Dunwich Heath on their last visit, or say they intend to go in the next two years, thought that they would visit less often during construction.

Two further, more specific, questions were asked to gain a greater understanding on how potential visitors thought the construction of Sizewell C might change or affect the way they visit this part of Suffolk in future during construction. The first question posed a series of ways in which visitors may change the way they visit this part of Suffolk in future:

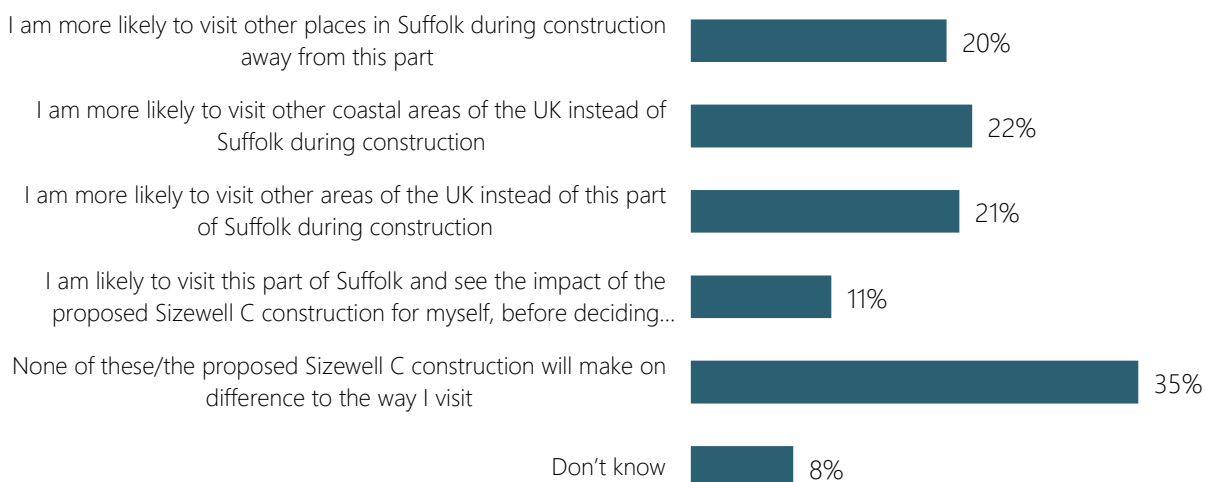
- 20% say they are more likely to visit other places in Suffolk during the construction;
- 22% say they are more likely to visit other coastal areas of the UK instead of Suffolk;
- 21% say they are more likely to visit other areas of the UK instead of this part of Suffolk;
- 11% say they are likely to visit this part of Suffolk and see the impact of construction for themselves, before deciding whether or not to return; and
- 35% choose none of these options/say that the proposed construction will make no difference to the way they visit.

As shown in **Figure 4.7**, the most prevalent view is that the construction will make no difference to the way this group of visitors will visit the area. This opinion was most strongly held by older adults (44% of 45-54 year olds and 48% of 55-75 year olds), those living in the East of England (46%) and more frequent visitors (44% for those who have visited between 6-20 times and 56% for those who have visited more than 20 times).

An expectation of visiting other places and areas away from the part of Suffolk affected by the construction was more common among those with children (53% against 48% of visitors overall), those aged 16-24 (58%) and those who say they know a lot/fair amount about Sizewell C (63%).

For those who had thought they were less likely to visit after reading the description, visiting other areas of the UK (instead of Suffolk) was the most popular response given (44% compared to the average 21%), after this, 39% (compared to 22% average) say they will visit other coastal areas in the UK, and one in four (26% compared to average 20%) say they will visit other parts of Suffolk away from the construction area.

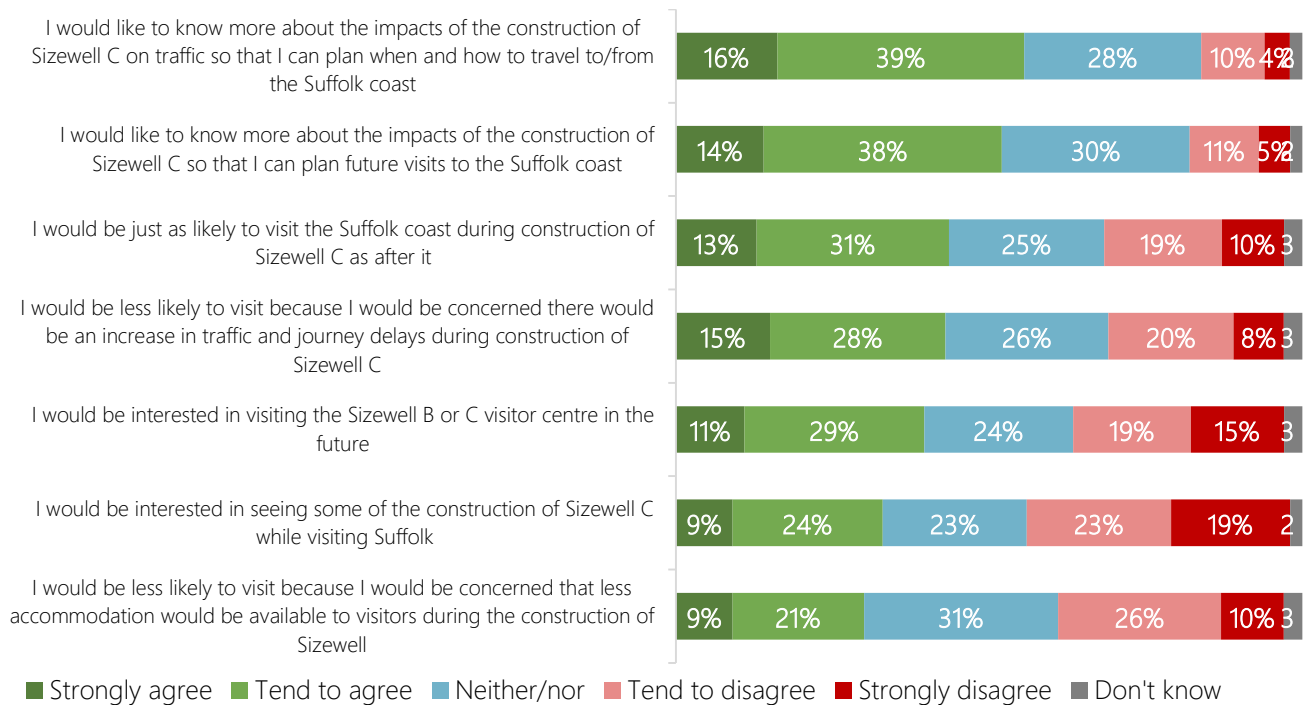
**Figure 4.7** – Q44. Here are some more ways in which construction of the proposed new nuclear power station – Sizewell C might change the way you visit this part of Suffolk in the future, or it might make no difference to you.



Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

**Figure 4.8** below summarises responses to the second question, a series of agree or disagree statements about visiting the Suffolk coast.

**Figure 4.8** – Q45 Below are some statements about how the construction of the proposed new nuclear power station – Sizewell C – might affect the way you visit this part of Suffolk. To what extent do you agree or disagree with each?



Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

Over half (52%) agree 'I would like to know more about the impacts of the construction of Sizewell C so that I can plan future visits to the Suffolk coast.' Visitors who say they are less likely to visit this part of Suffolk during construction of Sizewell C, and those who say they are more likely, are more inclined to agree with this statement (63% and 68% respectively), while those who say potential construction has not changed their views about visiting are less likely to agree (43%).

Over half (55%) say that they 'would like to know more about the impacts of the construction of Sizewell C on traffic so that I can plan when and how to travel to/from the Suffolk coast'. Those living in Wales, Greater London and the Midlands tended to be relatively more concerned about the impact on traffic and congestion. Those who would be visiting from the South West were less interested in traffic information (45%), although, overall comfortably more than a third agreed with the statement, 'I would be less likely to visit because I would be concerned there would be an increase in traffic and journey delays during construction of Sizewell C'.

Agreement with this statement, that is to say concern about an increase in traffic and delays, is also significantly higher among those who say they are less likely to visit during construction of Sizewell C (74%) than those who say the potential construction has not changed their views (25%).



The idea of SZC Co. providing information on how the construction might affect travel, so that visitors can better plan future visits or accommodate for potential delays, received strong endorsement; 55% agreeing with this, 14% disagreeing.

Overall interest in seeing some of Sizewell C during construction or attending the visitors centre is relatively low (40% and 44% respectively). However, these activities are of greater appeal among those who said they were '*more likely to visit*'. For example, seven in ten (70%) of likely visitors are interested in seeing Sizewell C construction, whereas there is low appeal to see this among those who are '*less likely*' – with an equal proportion (69%) saying they would not be interested.

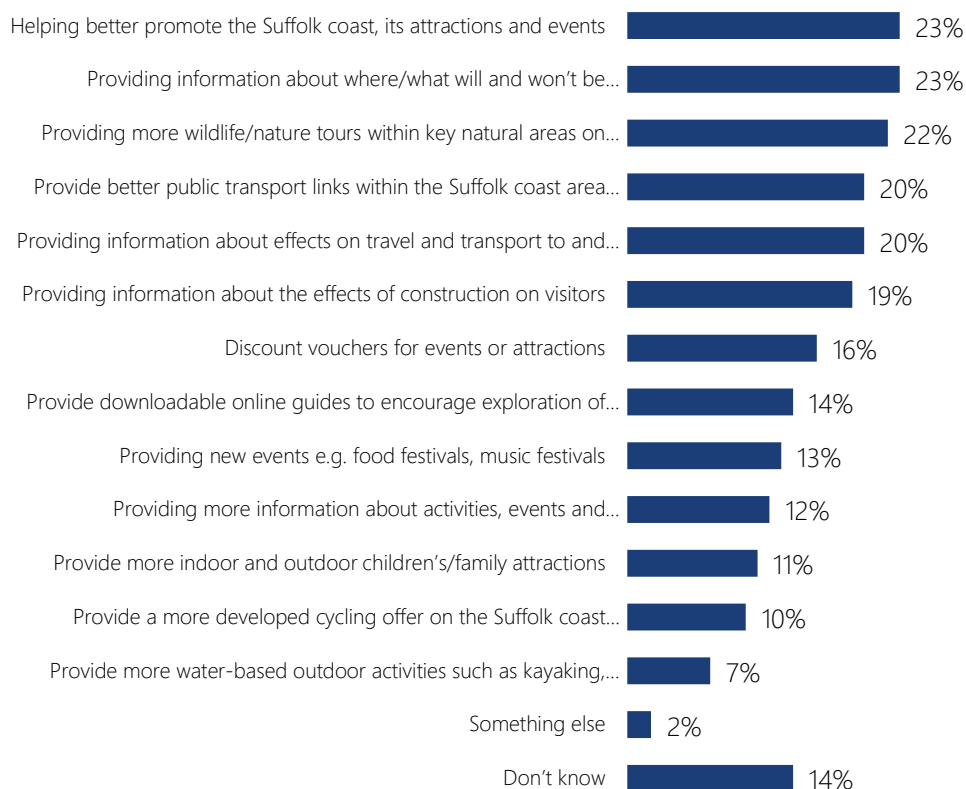
In relation to information provision, receiving information about how the construction might impact traffic to and from the coast is welcomed across both those who are more and less likely to visit. There is a little more interest shown by those who say they are '*more likely*' to visit (67%) than those who are '*less likely*' (63%). The difference is more marked among those who are '*a little less likely*' (67%) than '*much less likely*' (55%). The '*little less likely*' group are also more likely to attribute lower propensity to visit to traffic and journey delays – 74% compared to the 25% who say their view has not changed, and 57% who said it made them more likely to visit.

## The Tourism Fund

As shown in **Figure 4.9**, the most popular options for investment by SZC Co. via a tourism fund, selected from a list, relate to transport services and travel information and endorsing existing events and attractions on the Suffolk coast.

Nearly one quarter (23%) prefer information on what will and will not be accessible during the construction phase, and one in five (20%) think there could be better transport links so that visitors can explore other areas of the Suffolk coast more easily. A similar proportion think SZC Co. could invest in local attractions and events (23%), and potentially help to provide more wildlife/nature tours within key nature areas (20%). People were asked to select two or three of the suggestions; 14% said that they do not know.

**Figure 4.9** – Q46. SZC Co. – the company proposing to build Sizewell C – are working up plans for a fund supporting tourism and are considering investments to support this part of the Suffolk during construction. In your opinion which two or three, if any, of these should be given the greatest priority for investment by SZC Co.?



Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

Offering discounted tickets and vouchers is relatively popular among 45-55-year olds (chosen by 20%), less so among those aged 55-75 years old (12%). Providing new events, such as food and music festivals is most popular among 18-25-year olds (19%) and less so among 55 to 75-year olds (9%). The introduction of additional outdoor children and family orientated activities was favoured by 17% and 18% of 25 to 35- and 45 to 54-year olds respectively, compared to the average of 11%.

Those living in the East of England were most interested in getting information on accessibility to areas during the construction (28%). Those who had visited either Minsmere or Dunwich Heath in the past, or intended to in the future, were more likely than average to think that more wildlife/nature tours could be provided at key natural areas on the Suffolk coast. Around a third of past/potential Minsmere (37%) and Dunwich Heath (32%) visitors selected this option (compared to 22% of visitors overall). This was also the most popular funding option among those who said they were either much or a little less likely to visit; a quarter of this group think greatest priority should be given to support key nature areas.

Participants were also given the option to volunteer their own suggestions about how they thought EDF could invest, and 2% did so. Mentions included:

- Protecting nature preservation/ecosystems (15 mentions)

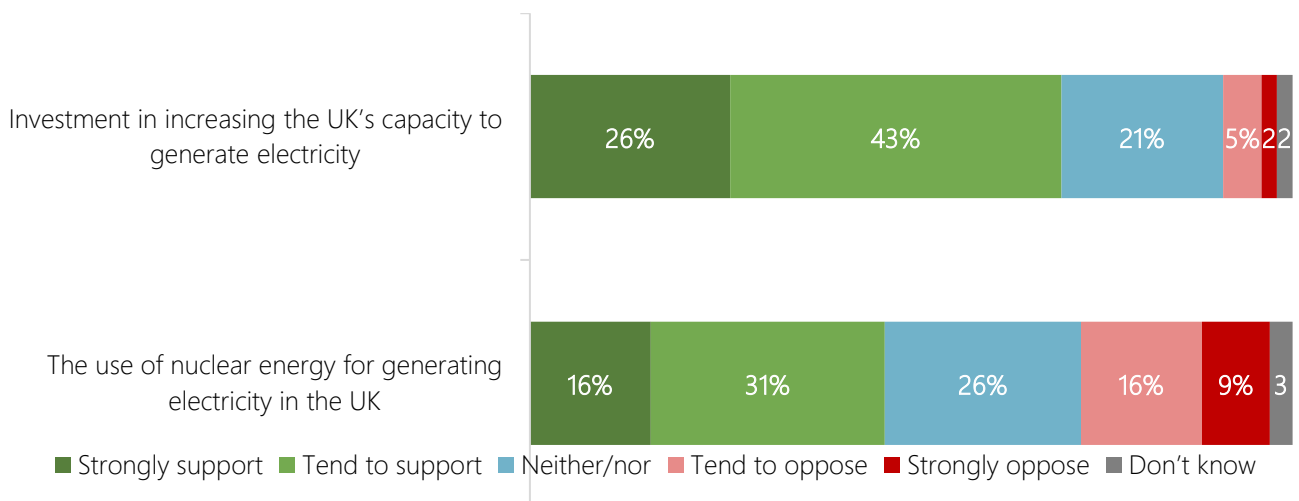
- Not building the reactor/nuclear power plant (14 mentions)
- Supporting the wildlife/limit the impact the construction has on wildlife (8 mentions)

### Attitudes towards nuclear and energy generation

After questions about Sizewell C (deliberately placed at the end of the survey to minimise any impact on attitudes towards Sizewell C), participants were asked about increasing the capacity of the UK's energy generation and the use of nuclear energy. Among past and potential visitors, seven in ten (69%) say they support investment in increasing the UK's capacity to generate electricity with nearly half (46%) supporting the use of nuclear energy for generating electricity in the UK, shown in **Figure 4.10**.

While comparisons with Government tracking surveys can only be indicative because of differences in methodology, our sample of visitors is broadly similar in attitudes to the wider British public.

**Figure 4.10** – Q47. To what extent do you support or oppose the following...



Base: All adults aged 16-75 in the UK who visited in the past year and/or likely to visit in the next two (3,093)

There is a clear link between visitors' stated intention to visit Suffolk or not during construction of Sizewell C, and levels of support for nuclear energy in the UK. Specifically, those who say they are less likely to visit this part of Suffolk during the construction of Sizewell C are significantly more likely to oppose the use of nuclear energy for generating electricity in the UK. More than half (56%), of visitors who are '*much less likely*' to visit, and 44% of those who are '*a little less likely*' to visit, oppose nuclear power generation in the UK. This compares with 16% among those who say their views have not changed on reading about the potential construction of Sizewell C, and 12% of those who say they are more likely to visit during construction.

# Appendices

## Appendix 1: The questionnaire

### Suffolk Visitors Survey

YEAR/MONTH. What is your date of birth?

- YEAR
- \_1910 1910
- ...
- \_2015 2015
- MONTH
- \_1 January
- \_2 February
- \_3 March
- \_4 April
- \_5 May
- \_6 June
- \_7 July
- \_8 August
- \_9 September
- \_10 October
- \_11 November
- \_12 December

RESP\_AGE [Hidden]. Hidden Question - RESP\_AGE "this is a dummy question that will hold age"

- USE RESP\_AGE [Hidden] response list

QUOTAGERANGE [Hidden]. Hidden Question - QUOTAGERANGE "this is a dummy question that will hold age breaks" for the quotas that should be defined by the PM; it CAN be edited and lines can be added to meet survey objectives.

- \_18\_24 "18-24",
- \_25\_34 "25-34",
- \_35\_44 "35-44",
- \_45\_54 "45-54",
- \_55\_75 "55-75"

GENDER\_NONBINARY. Which of the following describes how you think of yourself?

- \_1 Male
- \_2 Female
- \_3 In another way
- \_4 Prefer not to answer

S3. Which of the following activities best describes what you are doing at present?

1. Working full time job (30 hours+)
2. Working part time job (under 30 hours)
3. Self-employed (full time or part time)
4. On a government supported training programme (e.g. Modern apprenticeship/ National Traineeship/ Training for Work)
5. Full time education at school/college/university
6. Unemployed and available for work
7. Permanently sick/disabled
8. Wholly retired from work
9. Looking after the home
10. Doing something else (PLEASE SPECIFY)

#### A. SCREENER

The next questions are about visiting places in England.

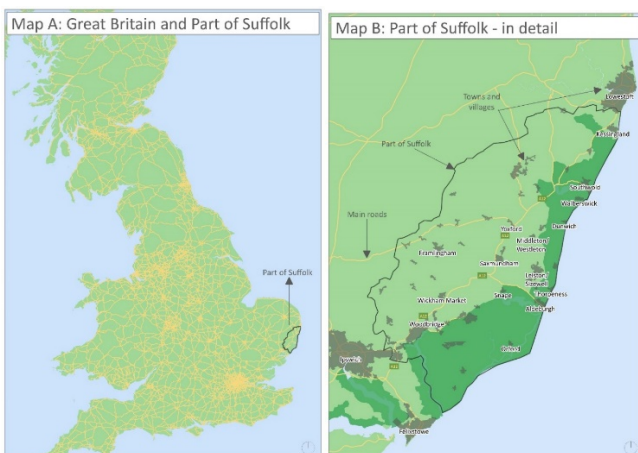
S5. How often, if at all, do you take holidays in the UK away from home, including breaks of more than one night, weekend breaks, short breaks and longer breaks of 7 nights or more?

1. Several times a year
2. Once a year
3. Once every two years or so
4. Less often
5. Never
6. Don't know

S6. Have you, personally, EVER visited the part of Suffolk shown on these maps (Map A and Map B)?

By visiting, we mean going there on holiday, for leisure or recreation or stopping there on your way to somewhere else. We do NOT mean passing through without stopping, for example while travelling to somewhere else or as part of your commute to work, or on a business trip.

We are interested in all visits, so please count day-trips as well as short breaks of one night or more, longer holidays or visits.



#### SINGLE CODE

1. Yes – have visited
2. No – have never visited
3. I live permanently in this part of Suffolk
4. Don't know

S7. When did you last visit the part of Suffolk shown on this map? **[VARIABLE TEXT FOR THOSE WHO LIVE PERMANENTLY HERE (S6 = 3)]** By visit, we mean any trips away from your home to other parts of Suffolk.]

1. In the last month
2. 1 month up to 3 months ago
3. 3 months up to 6 months ago
4. 6 months up to 1 year ago
5. 1 year up to 2 years ago
6. 2 years up to 3 years ago
7. 3 or more years ago
8. Don't know

S8. Still thinking about the part of Suffolk shown on this map, how likely or unlikely do you think you are to visit there in the next two years? **[VARIABLE TEXT FOR THOSE WHO LIVE PERMANENTLY HERE (S6 = 3):** By visit, we mean any trips away from your home to other parts of this part of the Suffolk coast.]

Again, we are interested in day-trips as well as short breaks of one night or more, longer holidays or visits. We do NOT mean passing through without stopping, for example while travelling to somewhere else or as part of your commute to work, or on a business trip.

1. I am certain to visit
2. I am very likely to visit
3. I am fairly likely to visit
4. I am fairly unlikely to visit
5. I am very unlikely to visit
6. I am certain not to visit
7. Don't know

**S8a** You have said that you think you are likely or certain to visit in the next 2 years. How likely or unlikely do you think you are to visit there in the...

#### ROWS

1. ...next 12 months?
2. ...next 6 months?

#### COLUMNS

1. I am certain to visit
2. I am very likely to visit
3. I am fairly likely to visit
4. I am fairly unlikely to visit
5. I am very unlikely to visit
6. I am certain not to visit
7. Don't know

Thank you for answering our questions. Sorry – on this occasion we're looking for different groups of people.

## **Visiting the Suffolk coast**

The next questions are about the visits you have made to the part of Suffolk shown on Map B.

Q1 How many times have you EVER visited the area of Suffolk as shown on this map?

[VARIABLE TEXT FOR THOSE WHO LIVE PERMANENTLY HERE (S6 = 3)]: By visit, we mean any trips away from your home to other parts of this area of the Suffolk coast. This might have been for leisure or recreation or stopping there on your way to somewhere else. We do not mean passing through without stopping, for example while travelling to somewhere else or as part of your commute to work, or on a business trip.

OTHERS S6=NOT 3: By visiting we mean you might have been there on day trips, short breaks of one night or more, longer holidays, for leisure or recreation or stopping there on your way to somewhere else. We do not mean passing through without stopping, for example while travelling to somewhere else or as part of your commute to work, or on a business trip.

1. Once
2. Twice
3. Between three and five times
4. Between six and ten times
5. Between 11 and 20 times
6. More than 20 times
7. Never
8. Can't remember/don't know

Q2 Thinking about the last time you visited this part of Suffolk when was this?

1. Within the last month
2. Between 1 and up to 3 months ago
3. Between 6 and up to 9 months ago
4. Between 9 and up to 12 months ago
5. Between 1 year and 2 years ago
6. Longer than 2 years ago
7. Can't remember/don't know

Q3 Still thinking about the last time you visited this part of Suffolk, in which month of the year were you there? If you were there during two or more months, please indicate all that apply.

1. January
2. February
3. March
4. April
5. May
6. June
7. July
8. August
9. September
10. October
11. November
12. December
13. Can't remember/don't know



Q4 Thinking again about the last time you visited this part of Suffolk, including yourself, how many adults and children (lv 16 years of age) visited with you?

1. Adults
2. Children aged 16 or under

Q4a You mentioned that you visited with child(ren), were they primary or secondary school age or not?

1. Yes, child(ren) primary/secondary school age (including sixth form/college)
2. No child(ren) of school age
3. Can't remember/don't know

Q4b You mentioned that you visited with school age children. Did you visit during school term-time, or outside term-time (that is during holidays)?

1. Visited during school term-time
2. Visited outside term-time
3. Can't remember/don't know

Q5 What was the main purpose of your last visit?

1. Holiday
2. Leisure or recreation
3. Visiting family or for other personal reasons
4. Other (PLEASE SPECIFY)
5. Can't remember/don't know

Q6 On your last visit to this part of Suffolk, did you stay overnight somewhere away from home, or not?

1. Yes – stayed for one night or more
2. No – did not stay for one night or more
3. Can't remember/don't know

Q7 On your last visit, how many nights in total did you stay away from home?

1. Nights stayed
2. Can't remember/don't know

Q8 Still thinking about your last visit, how would you describe your overnight accommodation?

1. Own holiday home/property
2. Hotel
3. Guesthouse/Bed & Breakfast
4. Self-catering holiday cottage/apartment
5. Airbnb
6. Boat
7. Hostel
8. Caravan/motorhome
9. Camping/campsite/glamping
10. Stayed with friends or relatives
11. Other type of accommodation (PLEASE SPECIFY)
12. Can't remember/don't know

Q9 On your last visit to this part of Suffolk, which, if any, of these villages or towns was your overnight accommodation based nearest to? Please indicate all that apply if you stayed at different overnight accommodation. If your overnight accommodation was based outside the part of Suffolk shown on the map, please write the location in 'Other place'.

1. Aldeburgh
2. Dunwich
3. Felixstowe
4. Framlingham
5. Ipswich
6. Kessingland
7. Leiston / Sizewell
8. Lowestoft
9. Middleton / Westleton
10. Orford
11. Saxmundham
12. Snape
13. Southwold
14. Thorpeness
15. Walberswick
16. Wickham Market
17. Woodbridge
18. Yoxford
19. Other place (PLEASE SPECIFY)
20. Can't remember/don't know

Q10 Still thinking about your last visit to this part of Suffolk, which of these did you use to travel to and from there/back to where you live? Please indicate all that apply.

Q11 And thinking about the time you spent in this part of Suffolk, which of these did you use to travel around between places? Please indicate ALL that apply.

1. Car – as driver (own car)
2. Car – as driver (lease/hire car)
3. Car – as passenger (own car)
4. Car – as driver (hire/rental car)
5. Car – as passenger (hire/rental car)
6. Car – as passenger in taxi
7. Caravan/motorhome
8. Motorbike
9. Van
10. Train
11. Bus/coach
12. Aeroplane
13. Bicycle
14. By another way (please specify)
15. Can't remember/don't know

Q12 Thinking again about your last visit and your journey from home to this part of Suffolk, about how long did that take you in total, in minutes where one hour is 60 minutes, two hours is 120 minutes etc.? If you are not sure, please give your best estimate.

1. Can't remember/don't know

Q13 And the last time you visited this part of Suffolk, on which day of the week did you make your journey from your home?

1. Monday
2. Tuesday
3. Wednesday
4. Thursday
5. Friday
6. Saturday
7. Sunday
8. Can't remember/don't know

Q14 Still thinking about this journey from home, what time of day did you arrive at your destination in Suffolk?

1. During the morning (between 6am and 12pm)
2. During the afternoon (between 12pm and 6pm)
3. During the early evening (between 6pm and 9pm)
4. Later in the evening (between 9pm and 12pm)
5. After midnight (between midnight and 6am)
6. Can't remember/don't know

Q15 You said that you travelled to this part of Suffolk on a **TEXT FROM Q13** and **TEXT FROM Q14**. Which, if any, of these were the main reasons you chose to travel then?

1. Quieter time to travel
2. Fitted in with work/school/other commitments
3. Fitted in with accommodation booking/availability
4. To get to an appointment/event at a certain time
5. Had no choice/wasn't my decision
6. To get to an event
7. For another reason (please specify) **SPECIFY BOX**
8. For no reason **[EXCLUSIVE]**
9. Can't remember/don't know **[EXCLUSIVE]**

Q16 On which day of the week did you return home from your visit to this part of Suffolk?

1. Monday
2. Tuesday
3. Wednesday
4. Thursday
5. Friday
6. Saturday
7. Sunday
8. Can't remember/don't know

The next questions are about the same part of Suffolk and visiting it.

Q17 Thinking about your last visit to this part of Suffolk, which of these, if any, were the BEST two or three things about it? Please choose up to three responses.

Q17a And which one of these, if any, was the BEST thing about it?

1. Beautiful places/landscapes
2. Unspoilt places/landscapes
3. Peaceful
4. A relaxing escape from everyday life
5. Within reach/easy to get to
6. Clean and tidy
7. Good choice of accommodation
8. Good attractions/events/places to visit
9. Good choice of cafes / restaurants
10. Quiet and clean beaches
11. Good coastal paths / walking routes
12. Good cycling routes
13. Good place to visit for nature/wildlife
14. Good place to visit for heritage and culture
15. Open spaces/big skies
16. Dog-friendly
17. Child-friendly
18. Good weather
19. Something else (please specify)
20. None of these/nothing
21. Can't remember/don't know

Q18 Thinking about your last visit, which of these, if any, were the WORST two or three things about it?

Q18a And which one of these, if any, was the WORST thing about it?

1. It was expensive
2. Too crowded/too many tourists
3. Too quiet/boring
4. Traffic/congestion
5. Poor accommodation choices
6. Poor choice of attractions / places to visit
7. Not enough to do
8. Poor weather
9. Poor transport links
10. Not dog-friendly
11. Not child-friendly
12. Not clean (e.g. litter/dog fouling)
13. Poor behaviour of other visitors
14. Something else (PLEASE SPECIFY)
15. None of these/nothing
16. Can't remember/don't know

Q19 Here is a list of places you may have visited or spent time at in Suffolk. Thinking about your last visit, which, if any, of the following places did you visit?

[VARIABLE TEXT FOR THOSE WHO LIVE PERMANENTLY HERE, S6=3: By visit, we mean any trips away from your home].

1. Aldeburgh
2. Dunwich
3. Dunwich Heath (National Trust)
4. Eastbridge
5. Framlingham
6. Framlingham Castle (English Heritage)
7. Leiston Abbey (English Heritage)
8. Leiston
9. Minsmere Nature Reserve (RSPB - Royal Society for the Protection of Birds)
10. Orford Castle (English Heritage)
11. Orford Ness (National Trust)
12. Orford
13. Rendlesham/Tunstall Forest
14. Sizewell B visitor centre / tour
15. Sizewell
16. Snape Maltings
17. Southwold
18. Sutton Hoo (National Trust)
19. Thorpeness
20. Woodbridge
21. Walberswick
22. Westleton
23. Somewhere else (please specify)
24. Don't know/can't remember

Q20 And still thinking about your last visit to this part of Suffolk, which, if any, of these things did you or someone you were with do while there?

1. Walking/rambling
2. Cycling/mountain biking
3. Cinema
4. Cultural activities; theatre, art, music
5. Went to a festival
6. History/heritage; place, event, experience
7. Horseriding
8. Birdwatching
9. Wildlife watching
10. Fishing
11. Running
12. Shooting
13. Swimming in the sea
14. Leisure centre
15. Watersports
16. Golf
17. Stargazing
18. Driving around and sightseeing from car
19. Walked around/browsed towns/villages
20. Enjoying the landscape/view
21. Eating/ drinking out
22. Shopping
23. Visiting friends or relatives
24. Children's activities (e.g. parks, soft play centres)
25. Something else (please specify)
26. None of these
27. Don't know/can't remember

### **Future visits to the Suffolk coast**

Q21 Based on your own experiences, or just your impressions, which if any, of these would you say apply to the part of Suffolk we have been asking you about. Please indicate all that apply.

1. Beautiful places/landscapes
2. Unspoilt places/landscapes
3. Peaceful
4. A relaxing escape from everyday life
5. Within reach/easy to get to
6. Clean and tidy
7. Expensive
8. Good choice of accommodation
9. Good attractions/places to visit
10. Good choice of cafes / restaurants
11. Too crowded/too many tourists
12. Too quiet/boring
13. Traffic/lots of road traffic/congestion
14. Poor choice of attractions / places to visit
15. Poor accommodation choices
16. Not enough to do
17. Poor transport links
18. Quiet and clean beaches
19. Good coastal paths / walking routes
20. Good place to visit for nature/wildlife
21. Good place to visit for heritage and culture
22. Open spaces/big skies
23. Dog-friendly
24. Child-friendly
25. Don't know

Q22 You mentioned earlier that you are **[FROM S8]** to visit this part of Suffolk in the next 2 years. How many times do you think you will visit over the course of the next 2 years? Please write in the box. If you are unsure, please give your best estimate.

[VARIABLE TEXT FOR THOSE WHO LIVE PERMANENTLY HERE S6=3: By visit, we mean any trips away from your home].

Q23 You said that you are certain to visit this part of Suffolk. Just to check, have you already booked a holiday or some accommodation for your trip, or not?

1. Yes – I've already booked/arranged
2. Yes – I'm about to confirm
3. No – I've not already booked/arranged
4. No – I will go for one or more day trips/won't need to book anything
5. No – I don't need to book as will stay in own property
6. Don't know

Q24 And for when have you booked/arranged your holiday/accommodation?

1. Don't know/can't remember

Q25 Why did you choose this part of Suffolk to visit in the next 2 years?

1. Don't know

Q26 What would be the main purpose of your visit in the next 2 years?

1. Holiday
2. Leisure or recreation
3. Visiting family or for other personal reasons
4. Other (please specify)
5. Don't know

Q27 When visiting in the next 2 years, do you think you will stay overnight somewhere in this part of Suffolk, or not? If you are unsure, please give us an idea of what you think is most likely.

1. Yes – overnight stay
2. No – no overnight stay
3. Don't know

Q28 For how many nights do you think you would stay when visiting this part of Suffolk in the next 2 years? If you are unsure please give your best estimate.

1. Nights
2. Don't know

Q29 When visiting this part of Suffolk in the next 2 years, which of these villages or towns do you think it is likely that your overnight accommodation will be based in or near to? Please indicate all that apply.

1. Aldeburgh
2. Dunwich
3. Felixstowe
4. Framlingham
5. Ipswich
6. Kessingland
7. Leiston / Sizewell
8. Lowestoft
9. Middleton / Westleton
10. Orford
11. Saxmundham
12. Snape
13. Southwold
14. Thorpeness
15. Walberswick
16. Wickham Market
17. Woodbridge
18. Yoxford
19. Other place (please specify)
20. None of these
21. Don't know/haven't decided yet



Q30 Still thinking about your future visit(s) to this part of Suffolk, which of these do you think you will use to get there in the next 2 years? Please indicate all that apply.

1. Car – as driver (own car)
2. Car – as driver (lease/hire car)
3. Car – as passenger (own car)
4. Car – as driver (hire/rental car)
5. Car – as passenger (hire/rental car)
6. Car – as passenger in taxi
7. Caravan/motorhome
8. Motorbike
9. Van
10. Train
11. Bus/coach
12. Aeroplane
13. Bicycle
14. By another way (please specify)
15. Don't know/haven't decided yet

Q31 Here is a list of places and things to do in this part of Suffolk. Which, if any, of these do you think you will visit in the next 2 years?

1. Aldeburgh
2. Dunwich
3. Dunwich Heath (National Trust)
4. Eastbridge
5. Framlingham
6. Framlingham Castle (English Heritage)
7. Leiston Abbey (English Heritage)
8. Leiston
9. Minsmere Nature Reserve (RSPB - Royal Society for the Protection of Birds)
10. Orford Castle (English Heritage)
11. Orford Ness (National Trust)
12. Orford
13. Rendlesham
14. Sizewell B visitor centre / tour
15. Sizewell (village)
16. Snape Maltings
17. Southwold
18. Sutton Hoo (National Trust)
19. Thorpeness
20. Woodbridge
21. Walberswick
22. Westleton
23. Somewhere else (please specify)
24. None of these
25. Don't know/haven't decided yet

Q32 And which, if any, of these things do you think you or someone visiting with you will do when visiting this part of Suffolk in the next 2 years?

1. Walking/rambling
2. Cycling/mountain biking
3. Cinema
4. Cultural activities; theatre, art, music
5. Go to a festival
6. History/heritage; place, event, experience Go to a festival
7. Horse-riding
8. Birdwatching
9. Wildlife watching
10. Fishing
11. Running
12. Shooting
13. Swimming in the sea
14. Leisure centre
15. Water sports
16. Golf
17. Stargazing
18. Driving around and sightseeing from car
19. Walked around/browsed towns/villages
20. Enjoying the landscape/view
21. Eating and drinking out
22. Shopping
23. Visiting friends or relatives
24. Something else (please specify)
25. None of these
26. Don't know/haven't decided yet

### **Reasons for not revisiting**

Q33 You mentioned earlier that you are **[FROM S8]** to visit this part of Suffolk in the next 2 years. What are the reasons why you say you are unlikely/certain not to visit in the next 2 years having been there before?

1. Don't know

Q34 Which, if any, of the following describe why you will you not be visiting this part of Suffolk in the next 2 years having been there before?

1. Too far/takes too long to get there
2. Too difficult to travel around once there
3. Already been and like to try new places
4. Been too busy to travel anywhere
5. Risk of poor weather
6. Poor transport links
7. Prefer to go abroad
8. Prefer another UK destination
9. Too expensive to go there/not value for money
10. Can't afford a holiday this year
11. Not enough to see and do
12. Just doesn't appeal to me/no interest
13. Some other reason (please specify)
14. No reason/none of these
15. Don't know

Q35 You mentioned earlier that you are **[FROM S8]** to visit this part of Suffolk in the next 2 years. Which of one or two of these things, if any, would MOST encourage you to visit again?

1. Cheaper/better value accommodation
2. Better quality accommodation
3. Better choice of accommodation
4. More/better outdoor places to visit
5. More/better indoor places to visit
6. More/better attractions to visit
7. More free things to do
8. The prospect of better weather/a good forecast
9. Cheaper/better value for money attractions
10. Cheaper/better value for money to eat out
11. Something else (please specify)
12. None of these – I don't expect ever to visit again
13. Don't know

### **Sizewell C and tourism**

The next questions are about where you get news and information about this part of Suffolk and what you have heard.

Q36 Generally, from which, if any, sources do you get news about, hear about or find out about Suffolk? Please select all that apply.

1. National TV/radio
2. Local TV/radio
3. National newspapers, including online editions
4. Local newspapers, including online editions
5. Magazines
6. Advertising
7. Internet – national websites e.g. TripAdvisor, booking.com
8. Internet – local websites e.g. thesuffolkcoast.co.uk
9. Holiday brochures
10. Tourist Information Centre
11. Word of mouth, e.g. through friends or family
12. Social media
13. I visit regularly
14. Via a membership organisation (e.g. National Trust, RSPB (Royal Society for the Protection of Birds), Suffolk Wildlife Trust, English Heritage etc.)
15. Some other way (please specify)
16. I do not get news or information, hear about or find out about Suffolk
17. Don't know

Q37 Have you heard any news stories recently about this part of Suffolk, or not? If so, please tell us briefly what you have heard.

1. No, not heard any recent news stories
2. Yes, have heard recent news stories (please specify)
3. Don't know

Q38 Would you say that the news story has changed your likelihood to visit this part of Suffolk in the future, or not?

1. I am much more likely to visit in the future
2. I am a little more likely to visit in the future
3. It hasn't changed my views about visiting at all
4. I am a little less likely to visit in the future
5. I am much less likely to visit in the future
6. Don't know

Q39 Here are some possible ways in which the news story might change the way you will visit in the future, or it might make no difference to you. Please select all that apply.

1. I am likely to visit for more time than I intended to before
2. I am likely to visit different places(s) within this part of Suffolk
3. I am likely to visit different place(s) within Suffolk away from this part
4. I am likely to go a different way to get to, or around in, this part of Suffolk area
5. I am likely to visit this part of Suffolk for less time than I intended to before
6. Something else (please specify)
7. None of these/it hasn't changed my views about visiting at all
8. Don't know

Q40 Now on a different topic, before taking part in this online survey today, were you aware or not of the existing Sizewell A and B nuclear power plants on the Suffolk coast?

1. Yes, was aware of Sizewell A
2. Yes, was aware of Sizewell B
3. No, was not aware of them
4. Don't know

Below is a description about a proposed development in the same part of Suffolk. Please read the description carefully and then click "Next" for the question.

See **Appendix 2** for description

Q41 Before taking part in this online survey today and reading the description, to what extent were you familiar, or not, with the proposed construction of a new nuclear power station – Sizewell C? Before this survey...

1. I knew a lot about it
2. I knew a fair amount about it
3. I knew a little about it
4. I had heard about it but knew almost nothing about it
5. I had never heard of it
6. Don't know

Q42 Having read the description of the construction of the proposed new nuclear power station – Sizewell C, would you say that this has changed your views about whether or not to visit the area of Suffolk shown in Map B in the future?

1. I am much more likely to visit in the future
2. I am a little more likely to visit in the future
3. It hasn't changed my views about whether or not to visit at all
4. I am a little less likely to visit in the future
5. I am much less likely to visit in the future
6. Don't know

Q43 Here are some possible ways in which construction of the proposed new nuclear power station – Sizewell C – might change how often or not you visit this part of Suffolk in the future, or it might make no difference to you. Please select all that apply.

1. I am likely to visit more often during construction
2. I am likely to visit less often during construction
3. None of these/the proposed Sizewell C construction will make no difference to how often I visit
4. Don't know

Q44 Here are some more ways in which construction of the proposed new nuclear power station – Sizewell C – might change the way you visit this part of Suffolk in the future, or it might make no difference to you? Please select all that apply.

1. I am more likely to visit other places in Suffolk during construction away from this part
2. I am more likely to visit other coastal areas of the UK instead of Suffolk during construction
3. I am more likely to visit other areas of the UK instead of this part of Suffolk during construction
4. I am likely to visit this part of Suffolk and see the impact of the proposed Sizewell C construction for myself, before deciding whether or not to return
5. None of these/the proposed Sizewell C construction will make on difference to the way I visit
6. Don't know

Q45 Below are some statements about how the construction of the proposed new nuclear power station – Sizewell C – might affect the way you visit this part of Suffolk. To what extent do you agree or disagree with each?

#### ROWS

1. I would be less likely to visit because I would be concerned there would be an increase in traffic and journey delays during construction of Sizewell C
2. I would be less likely to visit because I would be concerned that less accommodation would be available to visitors during the construction of Sizewell
3. I would like to know more about the impacts of the construction of Sizewell C so that I can plan future visits to the Suffolk coast
4. I would like to know more about the impacts of the construction of Sizewell C on traffic so that I can plan when and how to travel to/from the Suffolk coast
5. I would be interested in seeing some of the construction of Sizewell C while visiting Suffolk
6. I would be interested in visiting the Sizewell B or C visitor centre in the future
7. I would be just as likely to visit the Suffolk coast during construction of Sizewell C as after it

#### COLUMNS

1. Strongly agree
2. Tend to agree
3. Neither agree nor disagree
4. Tend to disagree
5. Strongly disagree
6. Don't know

Q46 SZC Co. – the company proposing to build Sizewell C – are working up plans for a fund supporting tourism and are considering investments to support this part of Suffolk during construction. In your opinion which two or three, if any, of these should be given greatest priority for investment by SZC Co.?

1. Providing new events e.g. food festivals, music festivals
2. Providing more wildlife/nature tours within key natural areas on the Suffolk coast
3. Provide a more developed cycling offer on the Suffolk coast including cycling routes/infrastructure, cycle hire and cycling breaks
4. Provide more water-based outdoor activities such as kayaking, fishing, boat trips, kite-surfing
5. Provide downloadable online guides to encourage exploration of other areas of the Suffolk coast
6. Provide more indoor and outdoor children's/family attractions
7. Provide better public transport links within the Suffolk coast area to enable visitors to explore the area more widely
8. Helping better promote the Suffolk coast, its attractions and events
9. Discount vouchers for events or attractions
10. Providing information about the effects of construction on visitors
11. Providing information about effects on travel and transport to and within the area
12. Providing more information about activities, events and accommodation in the Suffolk coast
13. Providing information about where/what will and won't be accessible during construction
14. Something else (please specify)
15. Don't know

Q47 To what extent do you support or oppose the following...

#### ROWS

1. The use of nuclear energy for generating electricity in the UK
2. Investment in increasing the UK's capacity to generate electricity

#### COLUMNS

1. Strongly support
2. Tend to support
3. Neither support nor oppose
4. Tend to oppose
5. Strongly oppose
6. Don't know **FIX**

Finally, some questions about you to help with our analysis.

#### Demographics

KIDS02. How many children under the age of 18 are living in your household? Please reference only the children for which you are the parent or legal guardian. (If there are no children under 18 in your household, please type 0)

UK01SG [Hidden]. Hidden Question: Social Grade

- \_1 A - Upper middle class
- \_2 B - Middle class
- \_3 C1 - Lower middle class
- \_4 C2 - Skilled working class
- \_5 D - Working class
- \_6 E - Lower level of subsistence

Q48 In total, how many cars or vans are owned, or available for use, by members of this household?

1. None
2. 1
3. 2
4. 3
5. 4 or more (write in number)
6. Don't know

Q49 Remembering that all of your answers are confidential, what is your total household income before any taxes?

1. £10,000 or less
2. £10,001 up to £20,000
3. £20,001 up to £30,000
4. £30,001 up to £40,000
5. £40,001 up to £50,000
6. £50,001 up to £60,000
7. £60,001 up to £70,000
8. £70,001 up to £80,000
9. £80,001 up to £90,000
10. £90,001 up to £100K
11. £100K +
12. Prefer not to say

Q50 Which, if any, of the following organisations are you currently a member of? Please indicate all that apply.

1. English Heritage
2. National Trust
3. The RSPB (Royal Society for the Protection of Birds)
4. Suffolk Wildlife Trust
5. None of these
6. Don't know/can't remember

Q51 Thank you for taking part in the survey, Ipsos MORI may wish to recontact you, in the next 12 months to conduct more research about this project. Are you happy to be recontacted by us for this purpose?

1. No
2. Yes – please confirm your contact details

Thanks for taking part in this survey. If you want more information about the proposed Sizewell C development please go to: <https://www.edfenergy.com/energy/nuclear-new-build-projects/sizewell-c>



## Appendix 2: Description of proposed Sizewell C development

Below is a description about a proposed development in the same part of Suffolk. Please read the description carefully and then click "Next" for the question.

Sizewell C is a proposed new nuclear power station in Suffolk. The proposals are being developed by SZC Co. who aim to submit an application for development consent to the national Planning Inspectorate in early 2020.

### WHERE?

The proposed site for Sizewell C lies immediately north of the existing Sizewell B nuclear power station which was built in 1986. Sizewell C would operate in addition to Sizewell B.

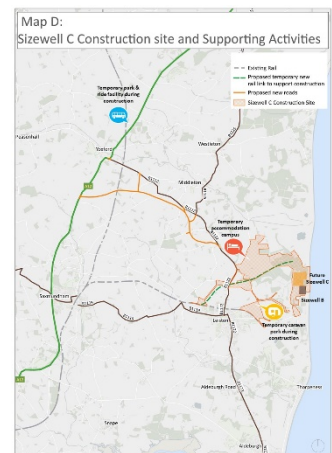
As shown in Map C below, the site for Sizewell C is approximately half-way between Felixstowe and Lowestoft, to the north-east of Leiston, and directly to the south of RSPB (Royal Society for the Protection of Birds) Minsmere and National Trust Dunwich Heath. The Sizewell C site, like Sizewell B, is within the Suffolk coast and Heaths Area of Outstanding Natural Beauty (AONB), a nationally protected landscape.



### HOW?

The proposed site for Sizewell C is on land previously used for the construction of Sizewell B power station, itself north of Sizewell A. It is now mainly grassland, and scrub land with some trees. A further area, shown in Map D below, will be needed for the construction of Sizewell C. Currently, this is mainly used for farming but also includes heathland and woodland within the Suffolk coast and Heaths AONB.

To support construction, plans include building an on-site 2,400 bed accommodation campus and a 400 pitch caravan site in Leiston for construction workers, plus road and rail improvements to allow construction materials to be moved to and from the site. It is proposed two new bypasses will also be built to help relieve local roads, and park and ride facilities, each for up to 1,250 cars, used to transport some workers to / from the site.



### WHEN AND WHY?

If approved, construction would take 9-12 years from 2022 and, once completed, the power station would operate for around 60 years.

During the busiest year of construction – probably 2027 - the project would employ up to 8,500 people, with around 900 permanent roles created when the station is fully operational. SZC Co. estimate that Sizewell C would be capable of generating enough low carbon electricity for around six million (20%) of Britain's homes.

### WHAT IMPACTS?

The proposals have been designed by SZC Co. to help reduce the effects on the landscape, wildlife, local communities and visitors during construction but there would still be some disturbance in the local area.

As a result of construction, there will be more traffic on the A12 and local roads, including the B1122. SZC Co. estimate there will be an average of 375 extra HGVs per day in the busiest year (up to double this on the busiest day of the busiest year), with a similar number of buses running mainly between the park and rides and the site. The extent to which noise is noticeable to local residents and visitors will depend on existing noise levels, wind direction and type of construction activity. Generally, in the surrounding area it may be heard, but it is unlikely that

noise will be a disturbance beyond 1 kilometre from the site, and only if within a few hundred metres of the construction site, would the noise levels be more disruptive.

Construction will have an impact on views. This will depend on the type of activity being undertaken and the viewpoint from which the construction site is being observed. Some construction activity may not be visible from outside the site but other activity could be visible from locations at greater distances, such as when tall cranes are in use during construction, when materials storage areas are at maximum height - estimated to be 35 metres in some locations - or when works are undertaken on the coast and offshore.

The construction site will also be visible at night from some locations in the surrounding area and will have an impact on night skies in the local area – vehicles and cranes will be lit.

It is anticipated that views will be most affected within 1 kilometre of the site, including in Leiston, on Sizewell beach, from footpaths around the site and routes such as the Suffolk coast path. The images below - A and B - use computer generated images to give an illustration of what would be seen from two viewpoints:

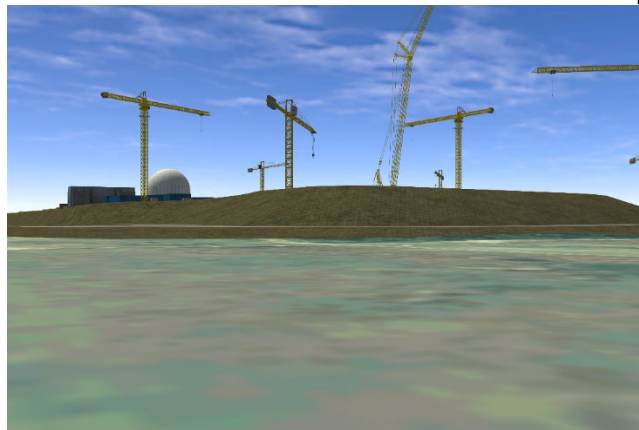


Image A: View looking south-west from Sizewell beach, east of Goose Hill, around 85m from northern edge of main construction area (Sizewell A is dark grey, Sizewell B is blue with white dome)

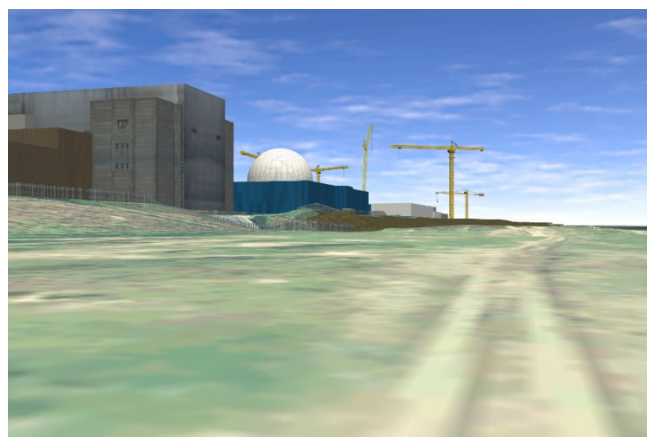


Image B: Suffolk Coastal Path and Sandlings Walk east of Hill Wood – view looking north from Sizewell beach, around 485m from southern edge of main construction area (Sizewell A is dark grey, Sizewell B is blue with white dome)

Views will also be affected further away - up to 2.5km from the site - from locations with direct views to construction works, including from the RSPB Minsmere reserve, National Trust Dunwich Coastguard Cottages and locations along the coast and offshore, shown in images C and D.

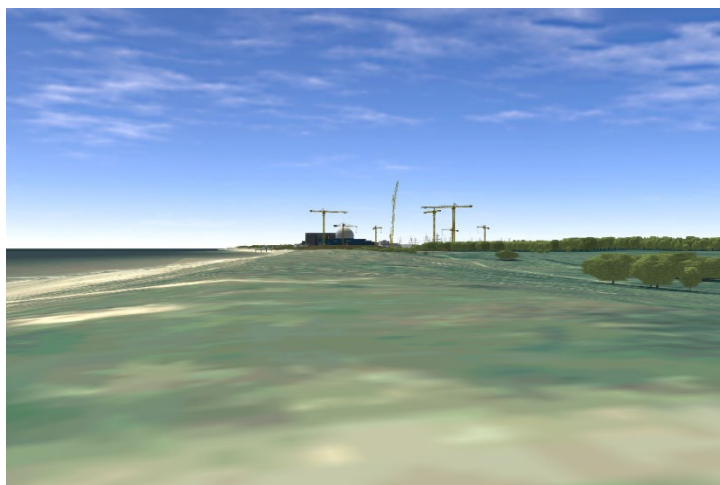


Image C: View looking south from RSPB Minsmere reserve, around 1.6km from northern edge of main construction area  
(Sizewell A is dark grey, Sizewell B is blue with the white dome)

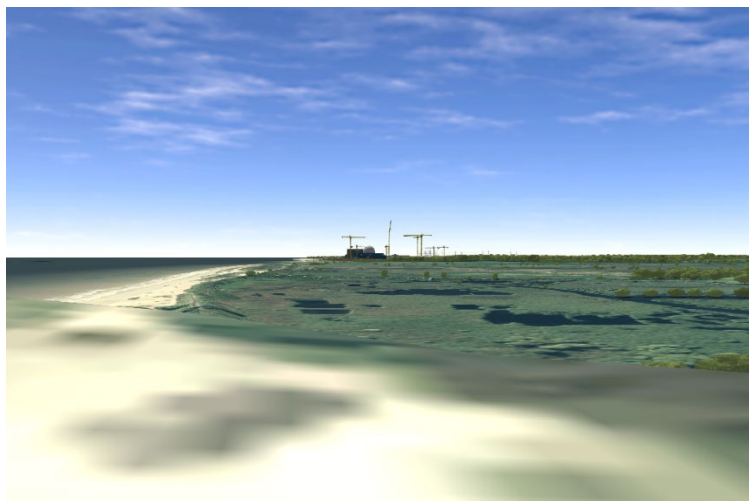


Image D: View looking south from National Trust Dunwich Coastguard Cottages, around 3.2km from northern edge of main construction area  
(Sizewell A is dark grey, Sizewell B is blue with the white dome)

### Appendix 3: Topline summary

S5. How often, if at all, do you take holidays in the UK away from home, including breaks of more than one night, weekend breaks, short breaks and longer breaks of 7 nights or more?

Base: All adults aged 16-75 in the UK (7730)

	%
Several times a year	45
Once a year	27
Once every two years or so	8
Less often	11
Never	9
Don't know	*
<b>Once a year or more</b>	<b>72</b>
<b>Once every two years or less</b>	<b>19</b>

S6. Have you, personally, EVER visited the part of Suffolk shown on these maps (Map A and Map B)?

By visiting, we mean going there on holiday, for leisure or recreation or stopping there on your way to somewhere else. We do NOT mean passing through without stopping, for example while travelling to somewhere else or as part of your commute to work, or on a business trip. We are interested in all visits, so please count day-trips as well as short breaks of one night or more, longer holidays or visits

Base: All adults aged 16-75 in the UK (7730)

	%
Yes – have visited	33
No – have never visited	64
I live permanently in this part of Suffolk	1
Don't know	2

S7. When did you last visit the part of Suffolk shown on this map? By visit, we mean any trips away from your home to other parts of Suffolk.

Base: All adults aged 16-75 in the UK who have visited Suffolk (2788)

	%
In the last month	7
1 month up to 3 months ago	8
3 months up to 6 months ago	9
6 months up to 1 year ago	12
1 year up to 2 years ago	13
2 years up to 3 years ago	10
3 or more years ago	36
Don't know	5
<b>Within past 3 months</b>	<b>15</b>
<b>Within past 6 months</b>	<b>24</b>
<b>Within past year</b>	<b>36</b>
<b>Within past two years</b>	<b>49</b>
<b>Within past 3 years</b>	<b>59</b>
<b>Ever</b>	<b>95</b>

S8. Still thinking about the part of Suffolk shown on this map, how likely or unlikely do you think you are to visit there in the next two years? By visit, we mean any trips away from your home to other parts of this part of the Suffolk coast. Again, we are interested in day-trips as well as short breaks of one night or more, longer holidays or visits. We do NOT mean passing through without stopping, for example while travelling to somewhere else or as part of your commute to work, or on a business trip.  
 Base: All adults aged 16-75 in the UK (7730)

	%
I am certain to visit	7
I am very likely to visit	11
I am fairly likely to visit	22
I am fairly unlikely to visit	25
I am very unlikely to visit	17
I am certain not to visit	7
Don't know	12
<b>Certain/likely to visit</b>	<b>39</b>
<b>Likely to visit</b>	<b>32</b>
<b>Unlikely to visit</b>	<b>41</b>
<b>Certain/Unlikely to visit</b>	<b>48</b>

S8a. You have said that you think you are likely or certain to visit in the next 2 years. How likely or unlikely do you think you are to visit there in the...

Base: All adults aged 16-75 in the UK who are certain or likely to visit (3034)

	%
<b>...next 12 months</b>	
I am certain to visit	14
I am very likely to visit	19
I am fairly likely to visit	39
I am fairly unlikely to visit	18
I am very unlikely to visit	4
I am certain not to visit	1
Don't know	5
<b>Certain/likely to visit</b>	<b>72</b>
<b>Likely to visit</b>	<b>57</b>
<b>Unlikely to visit</b>	<b>22</b>
<b>Certain/Unlikely to visit</b>	<b>23</b>
<b>...next 6 months</b>	
I am certain to visit	10
I am very likely to visit	13
I am fairly likely to visit	25
I am fairly unlikely to visit	28
I am very unlikely to visit	13
I am certain not to visit	6
Don't know	5
<b>Certain/likely to visit</b>	<b>48</b>
<b>Likely to visit</b>	<b>38</b>
<b>Unlikely to visit</b>	<b>41</b>
<b>Certain/Unlikely to visit</b>	<b>47</b>

## Visiting the Suffolk Coast

Q1. How many times have you EVER visited the area of Suffolk as shown on this map?

By visit, we mean any trips away from your home to other parts of this area of the Suffolk coast. This might have been for leisure or recreation or stopping there on your way to somewhere else. We do not mean passing through without stopping, for example while travelling to somewhere else or as part of your commute to work, or on a business trip...

OR By visiting we mean you might have been there on day trips, short breaks of one night or more, longer holidays, for leisure or recreation or stopping there on your way to somewhere else. We do not mean passing through without stopping, for example while travelling to somewhere else or as part of your commute to work, or on a business trip.

Base: All adults aged 16-75 in the UK who have visited or live in Suffolk who visited in last 2 years and would visit again (1816)

	%
Once	21
Twice	26
Between three and five times	25
Between six and ten times	12
Between 11 and 20 times	5
More than 20 times	8
Never	1
Can't remember/don't know	3
<b>2 to 5 times</b>	<b>51</b>
<b>6 to 20 times</b>	<b>17</b>

Q2. Thinking about the last time you visited this part of Suffolk when was this?

Base: All adults aged 16-75 in the UK who have visited for leisure at least once (1806)

	%
Within the last month	9
Between 1 and up to 3 months ago	17
Between 6 and up to 9 months ago	21
Between 9 and up to 12 months ago	10
Between 1 year and 2 years ago	15
Longer than 2 years ago	26
Can't remember/don't know	2
<b>Within past 3 months</b>	<b>26</b>
<b>Within past 9 months</b>	<b>47</b>
<b>Within past year</b>	<b>57</b>
<b>Within past two years</b>	<b>72</b>

Q3. Still thinking about the last time you visited this part of Suffolk, in which month of the year were you there? If you were there during two or more months, please indicate all that apply.

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
January	10
February	13
March	17
April	19
May	19
June	14
July	12
August	11
September	12
October	8
November	6
December	7
Can't remember/don't know	2

Q4. Thinking again about the last time you visited this part of Suffolk, including yourself, how many adults and children (under 16 years of age) visited with you?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
<b>Adults</b>	
1	19
2	64
3	7
4+	10
<b>Mean</b>	<b>2.28</b>
<b>Children aged 16 or under</b>	
0	54
1	21
2	17
3	3
4+	2
Don't know	3
<b>Mean</b>	<b>0.73</b>

Q4a. You mentioned that you visited with child(ren), were they primary or secondary school age or not?

Base: All adults aged 16-75 in the UK who have visited with children in last 12 months (438)

	%
Yes, child(ren) primary/secondary school age (including sixth form/college)	84
No child(ren) of school age	16
Can't remember/don't know	0

Q4b. You mentioned that you visited with school age children. Did you visit during school term-time, or outside term-time (that is during holidays)?

Base: All adults aged 16-75 in the UK who have visited with school age children in past 12 months (370)

	%
Visited during school term-time	42
Visited outside term-time	56
Can't remember/don't know	2

Q5. What was the main purpose of your last visit?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
Holiday	36
Leisure or recreation	45
Visiting family or for other personal reasons	17
Other	2
Can't remember/don't know	*

Q6. On your last visit to this part of Suffolk, did you stay overnight somewhere away from home, or not?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
Yes – stayed for one night or more	79
No – did not stay for one night or more	21
Can't remember/don't know	*

Q7. On your last visit, how many nights in total did you stay away from home?

Base: All adults aged 16-75 in the UK who stayed overnight (809)

	%
1	9
2	30
3	24
4	10
5-7	18
8+	3
Can't remember/don't know	6
<b>Mean</b>	<b>3.66</b>

Q8. Still thinking about your last visit, how would you describe your overnight accommodation?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months and stayed overnight (809)

	%
Own holiday home/property	10
Hotel	40
Guesthouse/Bed & Breakfast	21
Self-catering holiday cottage/apartment	14
Airbnb	11
Boat	3
Hostel	4
Caravan/motorhome	7
Camping/campsite/glamping	5
Stayed with friends or relatives	12
Other type of accommodation	1
Can't remember/don't know	*

Q9. On your last visit to this part of Suffolk, which, if any, of these villages or towns was your overnight accommodation based nearest to? Please indicate all that apply if you stayed at different overnight accommodation. If your overnight accommodation was based outside the part of Suffolk shown on the map, please write the location in 'Other place'.

Base: All adults aged 16-75 in the UK who have visited in the last 12 months and stayed overnight (809)

	%
Aldeburgh	12
Dunwich	9
Felixstowe	12
Framlingham	6
Ipswich	18
Kessingland	7
Leiston / Sizewell	4
Lowestoft	18
Middleton / Westleton	6
Orford	11
Saxmundham	5
Snape	5
Southwold	12
Thorpeness	6
Walberswick	3
Wickham Market	4
Woodbridge	10
Yoxford	3
Other place	4
Can't remember/don't know	3

Q10. Still thinking about your last visit to this part of Suffolk, which of these did you use to travel to and from there/back to where you live?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
Car – as driver (own car)	62
Car – as driver (lease/hire car)	7
Car – as passenger (own car)	20
Car – as driver (hire/rental car)	5
Car – as passenger (hire/rental car)	4
Car – as passenger in taxi	2
Caravan/motorhome	3
Motorbike	1
Van	1
Train	7
Bus/coach	4
Aeroplane	2
Bicycle	1
By another way	1
Can't remember/don't know	*
<b>Car</b>	<b>90</b>



Q11. And thinking about the time you spent in this part of Suffolk, which of these did you use to travel around between places?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
Car – as driver (own car)	61
Car – as driver (lease/hire car)	8
Car – as passenger (own car)	19
Car – as driver (hire/rental car)	5
Car – as passenger (hire/rental car)	5
Car – as passenger in taxi	3
Caravan/motorhome	2
Motorbike	1
Van	1
Train	4
Bus/coach	8
Aeroplane	2
Bicycle	2
By another way	4
Can't remember/don't know	1
<b>Car</b>	<b>89</b>

Q12. Thinking again about your last visit and your journey from home to this part of Suffolk, about how long did that take you in total, in minutes where one hour is 60 minutes, two hours is 120 minutes etc.?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
Less than 1 hour	17
1 to less than 2 hours	17
2 to less than 3 hours	20
3+ hours	22
Can't remember/don't know	24
Mean	133.89 minutes

Q13. And the last time you visited this part of Suffolk, on which day of the week did you make your journey from your home?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
Monday	9
Tuesday	9
Wednesday	11
Thursday	11
Friday	29
Saturday	17
Sunday	6
Can't remember/don't know	8

Q14. Still thinking about this journey from home, what time of day did you arrive at your destination in Suffolk?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
During the morning (between 6am and 12pm)	36
During the afternoon (between 12pm and 6pm)	44
During the early evening (between 6pm and 9pm)	13
Later in the evening (between 9pm and 12pm)	4
After midnight (between midnight and 6am)	2
Can't remember/don't know	2
<b>During the daytime</b>	<b>79</b>
<b>During the evening</b>	<b>17</b>

Q15. You said that you travelled to this part of Suffolk on a **TEXT FROM Q13** and **TEXT FROM Q14**. Which, if any, of these were the main reasons you chose to travel then?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months and remember day and time of journey and arrival (937)

	%
Quieter time to travel	40
Fitted in with work/school/other commitments	31
Fitted in with accommodation booking/availability	29
To get to an appointment/event at a certain time	11
Had no choice/wasn't my decision	7
To get to an event	4
For another reason	3
For no reason	7
Can't remember/don't know	1

Q16. On which day of the week did you return home from your visit to this part of Suffolk?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
Monday	14
Tuesday	8
Wednesday	10
Thursday	8
Friday	13
Saturday	17
Sunday	22
Can't remember/don't know	8

Q17/Q17a. Summary: Best things

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
Beautiful places/landscapes	26
Unspoilt places/landscapes	8
Peaceful	11
A relaxing escape from everyday life	15
Within reach/easy to get to	5
Clean and tidy	3
Good choice of accommodation	2
Good attractions/events/places to visit	5
Good choice of cafes / restaurants	2
Quiet and clean beaches	4
Good coastal paths / walking routes	3
Good cycling routes	*
Good place to visit for nature/wildlife	3
Good place to visit for heritage and culture	3
Open spaces/big skies	1
Dog-friendly	1
Child-friendly	1
Good weather	2
Something else	1
None of these/nothing	1
Can't remember/don't know	*

Q17. Thinking about your last visit to this part of Suffolk, which of these, if any, were the BEST two or three things about it?  
 Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
Beautiful places/landscapes	47
Unspoilt places/landscapes	18
Peaceful	32
A relaxing escape from everyday life	27
Within reach/easy to get to	14
Clean and tidy	11
Good choice of accommodation	9
Good attractions/events/places to visit	13
Good choice of cafes / restaurants	9
Quiet and clean beaches	11
Good coastal paths / walking routes	11
Good cycling routes	3
Good place to visit for nature/wildlife	10
Good place to visit for heritage and culture	8
Open spaces/big skies	5
Dog-friendly	4
Child-friendly	4
Good weather	6
Something else	1
None of these/nothing	2
Can't remember/don't know	1
<b>Places/landscapes</b>	<b>57</b>
<b>Peace/relax/cleanliness</b>	<b>63</b>
<b>Amenities</b>	<b>28</b>
<b>Walking/cycling</b>	<b>14</b>
<b>Nature/weather</b>	<b>20</b>

Q17a. And which one of these, if any, was the best thing about it?

Base: All adults aged 16-75 in the UK who have visited and who selected more than one best thing (869)

	%
Beautiful places/landscapes	26
Unspoilt places/landscapes	7
Peaceful	12
A relaxing escape from everyday life	15
Within reach/easy to get to	5
Clean and tidy	3
Good choice of accommodation	2
Good attractions/events/places to visit	6
Good choice of cafes / restaurants	2
Quiet and clean beaches	4
Good coastal paths / walking routes	3
Good cycling routes	1
Good place to visit for nature/wildlife	4
Good place to visit for heritage and culture	4
Open spaces/big skies	2
Dog-friendly	1
Child-friendly	1
Good weather	2
Something else	1
None of these/nothing	1
Can't remember/don't know	*
<b>Places/landscapes</b>	<b>33</b>
<b>Peace/relax/cleanliness</b>	<b>33</b>
<b>Amenities</b>	<b>9</b>
<b>Walking/cycling</b>	<b>4</b>
<b>Nature/weather</b>	<b>7</b>

## Q18. Summary: Worst things

Base: All adults aged 16-75 in the UK who have visited in last 12 months (1030)

	%
It was expensive	11
Too crowded/too many tourists	5
Too quiet/boring	5
Traffic/congestion	10
Poor accommodation choices	3
Poor choice of attractions / places to visit	2
Not enough to do	4
Poor weather	13
Poor transport links	5
Not dog-friendly	1
Not child-friendly	*
Not clean (e.g. litter/dog fouling)	1
Poor behaviour of other visitors	2
Something else	2
None of these/nothing	2
Can't remember/don't know	*

## Q18. Thinking about your last visit, which of these, if any, were the WORST two or three things about it?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (1030)

	%
It was expensive	16
Too crowded/too many tourists	10
Too quiet/boring	10
Traffic/congestion	16
Poor accommodation choices	7
Poor choice of attractions / places to visit	5
Not enough to do	9
Poor weather	17
Poor transport links	8
Not dog-friendly	2
Not child-friendly	1
Not clean (e.g. litter/dog fouling)	2
Poor behaviour of other visitors	4
Something else	2
None of these/nothing	33
Can't remember/don't know	2
<b>Number of mentions</b>	<b>1.71</b>

## Q18a. And which one of these, if any, was the worst thing about it?

Base: All adults aged 16-75 in the UK who have visited and who selected more than one worst thing (362)

	%
It was expensive	18
Too crowded/too many tourists	7
Too quiet/boring	6
Traffic/congestion	14
Poor accommodation choices	5
Poor choice of attractions / places to visit	3
Not enough to do	6
Poor weather	17
Poor transport links	8
Not dog-friendly	2
Not child-friendly	*
Not clean (e.g. litter/dog fouling)	2
Poor behaviour of other visitors	4
Something else	2
None of these/nothing	5
Can't remember/don't know	1

Q19. Here is a list of places you may have visited or spent time at in Suffolk. Thinking about your last visit, which, if any, of the following places did you visit?

Base: All adults aged 16-75 in the UK who have visited or live in Suffolk who visited in last 2 years and would visit again (1816)

	%
Aldeburgh	22
Dunwich	12
Dunwich Heath (National Trust)	11
Eastbridge	5
Framlingham	12
Framlingham Castle (English Heritage)	14
Leiston Abbey (English Heritage)	7
Leiston	4
Minsmere Nature Reserve (RSPB - Royal Society for the Protection of Birds)	8
Orford Castle (English Heritage)	10
Orford Ness (National Trust)	10
Orford	8
Rendlesham/Tunstall Forest	2
Sizevell B visitor centre / tour	3
Sizevell	4
Snape Maltings	8
Southwold	27
Sutton Hoo (National Trust)	11
Thorpeness	8
Woodbridge	13
Walberswick	6
Westleton	1
Somewhere else	7
Don't know/can't remember	11
<b>Number of mentions</b>	<b>2.39</b>

Q20. And still thinking about your last visit to this part of Suffolk, which, if any, of these things did you or someone you were with do while there?

Base: All adults aged 16-75 in the UK who have visited or live in Suffolk who visited in last 2 years and would visit again (1816)

	%
Walking/rambling	48
Cycling/mountain biking	10
Cinema	8
Cultural activities; theatre, art, music	14
Went to a festival	5
History/heritage; place, event, experience	29
Horse-riding	3
Birdwatching	10
Wildlife watching	11
Fishing	4
Running	4
Shooting	2
Swimming in the sea	7
Leisure centre	4
Water sports	2
Golf	2
Stargazing	3
Driving around and sightseeing from car	28
Walked around/browsed towns/villages	45
Enjoying the landscape/view	36
Eating/ drinking out	46
Shopping	22
Visiting friends or relatives	15
Children's activities (e.g. parks, soft play centres)	6
Something else	4
None of these	1
Don't know/can't remember	2
<b>Number of mentions</b>	<b>3.75</b>

### Future visits to the Suffolk Coast

Q21. Based on your own experiences, or just your impressions, which if any, of these would you say apply to the part of Suffolk we have been asking you about. Please indicate all that apply.

Base: All adults aged 16-75 in the UK who have not visited and are likely to visit (1302)

	%
Beautiful places/landscapes	46
Unspoilt places/landscapes	27
Peaceful	39
A relaxing escape from everyday life	39
Within reach/easy to get to	10
Clean and tidy	22
Expensive	10
Good choice of accommodation	16
Good attractions/ places to visit	22
Good choice of cafes / restaurants	19
Too crowded/too many tourists	1
Too quiet/boring	2
Traffic/lots of road traffic/congestion	3
Poor choice of attractions / places to visit	2
Poor accommodation choices	1
Not enough to do	3
Poor transport links	8
Quiet and clean beaches	30
Good coastal paths / walking routes	40
Good place to visit for nature/wildlife	39
Good place to visit for heritage and culture	28
Open spaces/big skies	26
Dog-friendly	17
Child-friendly	15
Don't know	13
<b>Positive: Places/landscapes</b>	<b>55</b>
<b>Positive: Peace/relax/cleanliness</b>	<b>69</b>
<b>Positive: Amenities</b>	<b>39</b>
<b>Positive: Nature/weather</b>	<b>60</b>
<b>Negative: Amenities</b>	<b>12</b>

Q22. You mentioned earlier that you are **[FROM S8]** to visit this part of Suffolk in the next 2 years. How many times do you think you will visit over the course of the next 2 years? Please write in the box. If you are unsure, please give your best estimate. By visit, we mean any trips away from your home].

Base: All adults aged 16-75 in the UK who are certain or likely to visit (3034)

	%
0	*
1	60
2	23
3-5	12
6-10	3
11+	2
Mean	2.19

Q23. You said that you are certain to visit this part of Suffolk. Just to check, have you already booked a holiday or some accommodation for your trip, or not?

Base: All adults aged 16-75 in the UK who are certain or likely to visit (532)

	%
Yes – I've already booked/arranged	19
Yes – I'm about to confirm	16
No – I've not already booked/arranged	36
No – I will go for one or more day trips/won't need to book anything	20
No – I don't need to book as will stay in own property	8
Don't know	2
<b>Yes</b>	<b>35</b>
<b>No</b>	<b>64</b>

Q24. And for when have you booked/arranged your holiday/accommodation?

Base: All who have booked holiday accommodation (73)

	%
August (2019)	18
June (2019, 2020)	8
July (2019)	14
September (2019)	10
October (2019)	10
December/ Christmas	7
Other periods	14
No answer	27
Don't know/can't remember	-

Q25. Why did you choose this part of Suffolk to visit in the next 2 years?

Base: All who have booked holiday accommodation (73)

	%
I like it	15
It's good/a great place/ experience	9
It's beautiful/ lovely/ charming/ nice	13
It's quiet/ peaceful	8
Been there before (and liked it)	17
Family ties there/ friends nearby/ family home/ my home town	20
It's close to home/ easy to get to	8
To visit new places/ haven't been there before	5
Others	20
No answer	11
Don't know	1

Q26. What would be the main purpose of your visit in the next 2 years?

Base: All adults aged 16-75 in the UK who are certain or likely to visit (3034)

	%
Holiday	54
Leisure or recreation	52
Visiting family or for other personal reasons	12
Other	1
Don't know	1

Q27. When visiting in the next 2 years, do you think you will stay overnight somewhere in this part of Suffolk, or not? If you are unsure, please give us an idea of what you think is most likely.

Base: All adults aged 16-75 in the UK who are certain or likely to visit (3034)

	%
Yes – overnight stay	82
No – no overnight stay	12
Don't know	7

Q28. For how many nights do you think you would stay when visiting this part of Suffolk in the next 2 years? If you are unsure please give your best estimate.

Base: All adults aged 16-75 in the UK who have visited in the last 12 months and stayed overnight (2473)

	%
1	9
2	30
3	19
4	9
5-7	17
8+	4
Don't know	11
Mean	3.69



Q29. When visiting this part of Suffolk in the next 2 years, which of these villages or towns do you think it is likely that your overnight accommodation will be based in or near to?

Base: All adults aged 16-75 in the UK who have visited in the last 12 months (746)

	%
Aldeburgh	15
Dunwich	13
Felixstowe	14
Framlingham	12
Ipswich	17
Kessingland	8
Leiston / Sizewell	6
Lowestoft	16
Middleton / Westleton	5
Orford	12
Saxmundham	5
Snape	6
Southwold	16
Thorpeness	7
Walberswick	3
Wickham Market	5
Woodbridge	10
Yoxford	3
Other place	2
None of these	1
Don't know/haven't decided yet	10

Q30. Still thinking about your future visit(s) to this part of Suffolk, which of these do you think you will use to get there in the next 2 years?

Base: All adults aged 16-75 in the UK who are certain or likely to visit (3034)

	%
Car – as driver (own car)	61
Car – as driver (lease/hire car)	4
Car – as passenger (own car)	23
Car – as driver (hire/rental car)	3
Car – as passenger (hire/rental car)	2
Car – as passenger in taxi	2
Caravan/motorhome	3
Motorbike	1
Van	1
Train	15
Bus/coach	8
Aeroplane	1
Bicycle	1
By another way	1
Don't know/haven't decided yet	3
<b>Car</b>	<b>85</b>
Number of mentions	1.28

Q31. Here is a list of places and things to do in this part of Suffolk. Which, if any, of these do you think you will visit in the next 2 years?

Base: All adults aged 16-75 in the UK who are certain or likely to visit (3034)

	%
Aldeburgh	18
Dunwich	10
Dunwich Heath (National Trust)	20
Eastbridge	5
Framlingham	10
Framlingham Castle (English Heritage)	26
Leiston Abbey (English Heritage)	17
Leiston	4
Minsmere Nature Reserve (RSPB - Royal Society for the Protection of Birds)	17
Orford Castle (English Heritage)	22
Orford Ness (National Trust)	21
Orford	9
Rendlesham	3
Sizevell B visitor centre / tour	6
Sizevell (village)	7
Snape Maltings	8
Southwold	20
Sutton Hoo (National Trust)	20
Thorpeness	8
Woodbridge	12
Walberswick	6
Westleton	2
Somewhere else	1
None of these	1
Don't know/haven't decided yet	26

Q32. And which, if any, of these things do you think you or someone visiting with you will do when visiting this part of Suffolk in the next 2 years?

Base: All adults aged 16-75 in the UK who are certain or likely to visit (3034)

	%
Walking/rambling	56
Cycling/mountain biking	14
Cinema	9
Cultural activities; theatre, art, music	21
Go to a festival	11
History/heritage; place, event, experience	46
Horseriding	5
Birdwatching	14
Wildlife watching	21
Fishing	6
Running	6
Shooting	3
Swimming in the sea	14
Leisure centre	7
Watersports	4
Golf	3
Stargazing	9
Driving around and sightseeing from car	35
Walked around/browsed towns/villages	54
Enjoying the landscape/view	50
Eating/ drinking out	54
Shopping	29
Visiting friends or relatives	9
Something else	1
None of these	*
Don't know/haven't decided yet	6

### Reasons for not revisiting

Q33. You mentioned earlier that you are **[FROM S8]** to visit this part of Suffolk in the next 2 years. What are the reasons why you say you are unlikely/certain not to visit in the next 2 years having been there before?

Base: All adults aged 16-75 in the UK who have visited but are unlikely/certain not to revisit (44)

	%
Would like to go to other places too	37
No interest/ prefer not to go	9
Can't afford (accommodation)/went only on a special offer	11
Not exciting/ boring	6
I'm moving/ family moved	11
Long distance (to get there/ to supermarkets/ to attractions)	17
Not many things to do there	9
Other	17
None of these/ nothing	6
No answer	6
Don't know	-

Q34. Which, if any, of the following describe why you will you not be visiting this part of Suffolk in the next 2 years having been there before?

Base: All adults aged 16-75 in the UK who have visited but are unlikely/certain not to revisit (44)

	%
Too far/takes too long to get there	34
Too difficult to travel around once there	11
Already been and like to try new places	30
Been too busy to travel anywhere	7
Risk of poor weather	7
Poor transport links	5
Prefer to go abroad	14
Prefer another UK destination	25
Too expensive to go there/not value for money	5
Can't afford a holiday this year	7
Not enough to see and do	7
Just doesn't appeal to me/no interest	5
Some other reason	5
No reason/none of these	11
Don't know	0
<b>Transport/travelling</b>	<b>43</b>
<b>Prefer different destination</b>	<b>55</b>
<b>Financial</b>	<b>11</b>
<b>Not appealing</b>	<b>5</b>

Q35. You mentioned earlier that you are **[FROM S8]** to visit this part of Suffolk in the next 2 years. Which of one or two of these things, if any, would MOST encourage you to visit again?

Base: All adults aged 16-75 in the UK who have visited but are unlikely/certain not to revisit (44)

	%
Cheaper/better value accommodation	11
Better quality accommodation	9
Better choice of accommodation	11
More/better outdoor places to visit	14
More/better indoor places to visit	7
More/better attractions to visit	9
More free things to do	7
The prospect of better weather/a good forecast	11
Cheaper/better value for money attractions	2
Cheaper/better value for money to eat out	0
Something else	11
None of these – I don't expect ever to visit again	16
Don't know	20
<b>Cheaper/better value</b>	<b>20</b>
<b>Better accommodation</b>	<b>20</b>
<b>Better places to visit/attractions</b>	<b>23</b>

## Sizewell C and tourism

Q36. Generally, from which, if any, sources do you get news about, hear about or find out about Suffolk?

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
National TV/radio	7
Local TV/radio	5
National newspapers, including online editions	8
Local newspapers, including online editions	6
Magazines	7
Advertising	7
Internet – national websites e.g. tripadvisor, booking.com	36
Internet – local websites e.g. thesuffolkcoast.co.uk	33
Holiday brochures	13
Tourist Information Centre	17
Word of mouth, e.g. through friends or family	30
Social media	17
I visit regularly	9
Via a membership organisation (e.g. National Trust, RSPB (Royal Society for the Protection of Birds), Suffolk Wildlife Trust, English Heritage etc.)	15
Some other way	2
I do not get news or information, hear about or find out about Suffolk	13
Don't know	3
<b>Any national</b>	<b>43</b>
<b>Any local</b>	<b>39</b>
<b>Offline only</b>	<b>20</b>
<b>Online only</b>	<b>22</b>
Number of mentions	2.51

Q37. Have you heard any news stories recently about this part of Suffolk, or not? If so, please tell us briefly what you have heard.

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
No, not heard any recent news stories	92
Yes, have heard recent news stories	3
Don't know	5

Q38. Would you say that the news story has changed your likelihood to visit this part of Suffolk in the future, or not?

Base: All adults aged 16-75 in the UK who have heard a recent news story (78)

	%
I am <u>much more</u> likely to visit in the future	15
I am <u>a little more</u> likely to visit in the future	17
It <u>hasn't changed</u> my views about visiting at all	58
I am <u>a little less</u> likely to visit in the future	6
I am <u>much less</u> likely to visit in the future	3
Don't know	1
<b>More likely to visit</b>	<b>32</b>
<b>Less likely to visit</b>	<b>9</b>

Q39. Here are some possible ways in which the news story might change the way you will visit in the future, or it might make no difference to you.

Base: All adults aged 16-75 in the UK who have heard a recent news story (78)

	%
I am likely to visit for <u>more time</u> than I intended to before	18
I am likely to visit <u>different places(s)</u> within this part of Suffolk	19
I am likely to visit <u>different place(s)</u> within Suffolk away from this part	14
I am likely to <u>go a different way</u> to get to, or around in, this part of Suffolk area	5
I am likely to visit this part of Suffolk for <u>less time</u> than I intended to before	4
Something else	3
None of these/it hasn't changed my views about visiting at all	50
Don't know	3

Q40. Now on a different topic, before taking part in this online survey today, were you aware or not of the existing Sizewell A and B nuclear power plants on the Suffolk coast?

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
Yes, was aware of Sizewell A	45
Yes, was aware of Sizewell B	43
No, was not aware of them	41
Don't know	4

Q41. Before taking part in this online survey today and reading the description, to what extent were you familiar, or not, with the proposed construction of a new nuclear power station – Sizewell C? Before this survey...

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
I knew a lot about it	4
I knew a fair amount about it	6
I knew a little about it	17
I had heard about it but knew almost nothing about it	22
I had never heard of it	50
Don't know	1
<b>Knew about it</b>	<b>27</b>
<b>Heard about it</b>	<b>49</b>

Q42. Having read the description of the construction of the proposed new nuclear power station – Sizewell C, would you say that this has changed your views about whether or not to visit the area of Suffolk shown in Map B in the future?

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
I am <u>much more</u> likely to visit in the future	6
I am <u>a little more</u> likely to visit in the future	6
It hasn't changed my views about whether or not to visit at all	55
I am <u>a little less</u> likely to visit in the future	18
I am <u>much less</u> likely to visit in the future	10
Don't know	3
<b>More likely</b>	<b>13</b>
<b>Less likely</b>	<b>29</b>

Q43. Here are some possible ways in which construction of the proposed new nuclear power station – Sizewell C – might change how often or not you visit this part of Suffolk in the future, or it might make no difference to you.

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
I am likely to visit <u>more often</u> during construction	8
I am likely to visit <u>less often</u> during construction	39
None of these/the proposed Sizewell C construction will make no difference to how often I visit	47
Don't know	6

Q44. Here are some more ways in which construction of the proposed new nuclear power station – Sizewell C – might change the way you visit this part of Suffolk in the future, or it might make no difference to you?

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
I am more likely to visit <u>other places in Suffolk</u> during construction <u>away from this part</u>	20
I am more likely to visit <u>other coastal areas of the UK</u> instead of Suffolk during construction	22
I am more likely to visit <u>other areas of the UK</u> instead of this part of Suffolk during construction	21
I am likely to visit this part of Suffolk and <u>see the impact of the proposed Sizewell C</u> construction for myself, before deciding whether or not to return	11
None of these/the proposed Sizewell C construction will make on difference to the way I visit	35
Don't know	8
<b>Visit other places/areas</b>	<b>48</b>

Q45. Below are some statements about how the construction of the proposed new nuclear power station – Sizewell C – might affect the way you visit this part of Suffolk. To what extent do you agree or disagree with each?

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	Don't know	Agree	Disagree
	%	%	%	%	%	%	%	%
I would be less likely to visit because I would be concerned there would be an increase in traffic and journey delays during construction of Sizewell C	15	28	26	20	8	3	43	28
I would be less likely to visit because I would be concerned that less accommodation would be available to visitors during the construction of Sizewell	9	21	31	26	10	3	31	35
I would like to know more about the impacts of the construction of Sizewell C so that I can plan future visits to the Suffolk coast	14	38	30	11	5	2	52	16
I would like to know more about the impacts of the construction of Sizewell C on traffic so that I can plan when and how to travel to/from the Suffolk coast	16	39	28	10	4	2	55	15
I would be interested in seeing some of the construction of Sizewell C while visiting Suffolk	9	24	23	23	19	2	32	42
I would be interested in visiting the Sizewell B or C visitor centre in the future	11	29	24	19	15	3	40	34
I would be just as likely to visit the Suffolk coast <u>during</u> construction of Sizewell C as after it	13	31	25	19	10	3	44	28

Q46. SZC Co. – the company proposing to build Sizewell C – are working up plans for a fund supporting tourism and are considering investments to support this part of Suffolk during construction. In your opinion which two or three, if any, of these should be given greatest priority for investment by SZC Co.?

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
Providing new events e.g. food festivals, music festivals	13
Providing more wildlife/nature tours within key natural areas on the Suffolk coast	22
Provide a more developed cycling offer on the Suffolk coast including cycling routes/infrastructure, cycle hire and cycling breaks	10
Provide more water-based outdoor activities such as kayaking, fishing, boat trips, kite-surfing	7
Provide downloadable online guides to encourage exploration of other areas of the Suffolk coast	14
Provide more indoor and outdoor children's/family attractions	11
Provide better public transport links within the Suffolk coast area to enable visitors to explore the area more widely	20
Helping better promote the Suffolk coast, its attractions and events	23
Discount vouchers for events or attractions	16
Providing information about the effects of construction on visitors	19
Providing information about effects on travel and transport to and within the area	20
Providing more information about activities, events and accommodation in the Suffolk coast	12
Providing information about where/what will and won't be accessible during construction	23
Something else	2
Don't know	14
<b>Number of mentions</b>	<b>2.49</b>

Q47. To what extent do you support or oppose the following...

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	Strongly support	Tend to support	Neither support nor oppose	Tend to oppose	Strongly oppose	Don't know	Support	Oppose
	%	%	%	%	%	%	%	%
The use of nuclear energy for generating electricity in the UK	16	31	26	16	9	3	<b>46</b>	<b>25</b>
Investment in increasing the UK's capacity to generate electricity	26	43	21	5	2	2	<b>69</b>	<b>8</b>

QKIDS02. How many children under the age of 18 are living in your household? Please reference only the children for which you are the parent or legal guardian. (If there are no children under 18 in your household, please type 0)

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
At least one child present (18 or under)	14

QUK01SG. Social grade

Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
AB	47
C1	31
C2	8
DE	14

Q48. In total, how many cars or vans are owned, or available for use, by members of this household?  
 Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
None	12
1	49
2	31
3	6
4 or more	2
Don't know	*
Mean	1.36 cars or vans

Q49. Remembering that all of your answers are confidential, what is your total household income before any taxes?  
 Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
up to £20,000	17
£20,001 up to £40,000	32
£40,001 up to £60,000	22
£60,001+	21
Prefer not to say	9

Q50. Which, if any, of the following organisations are you currently a member of?  
 Base: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%
English Heritage	11
National Trust	25
The RSPB (Royal Society for the Protection of Birds)	9
Suffolk Wildlife Trust	4
None of these	61
Don't know/can't remember	4

QAGE.

Base %<sup>1</sup>: All adults aged 16-75 in the UK (7730)

Base %<sup>2</sup>: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	% <sup>1</sup>	% <sup>2</sup>
16-24	15	15
25-34	18	22
35-44	17	18
45-54	19	17
55-75	32	28

QGENDER.

Base %<sup>1</sup>: All adults aged 16-75 in the UK (7730)

Base %<sup>2</sup>: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%	% <sup>2</sup>
Male	50	51
Female	50	48
In another way	-	-
Prefer not to answer	-	-



S3. Which of the following activities best describes what you are doing at present?

Base %<sup>1</sup>: All adults aged 16-75 in the UK (7730)

Base %<sup>2</sup>: All adults aged 16-75 in the UK who visited in the past two years or who are likely to visit (3093)

	%	% <sup>2</sup>
Working full time job (30 hours+)	44	50
Working part time job (under 30 hours)	13	14
Self-employed (full time or part time)	6	7
On a government supported training programme (e.g. Modern apprenticeship/ National Traineeship/ Training for Work)	*	*
Full time education at school/college/university	5	5
Unemployed and available for work	4	4
Permanently sick/disabled	4	3
Wholly retired from work	17	13
Looking after the home/ housewife	5	4
Doing something else (example given included volunteer, maternity leave and carer)	*	1

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