



The Suffolk Coast

2021 Comparative Impact of Proposed Energy Projects on Tourism economy



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Background, objectives & methodology



Background & objectives

Energy projects on the Suffolk Coast

In 2019 The Suffolk Coast DMO commissioned BVA BDRC to evaluate the cumulative impact SPR wind turbine projects and EDF Sizewell C could have on the Suffolk Coast from a tourism perspective.

The initial findings were concerning. With fewer people prepared to consider visiting during construction of the energy developments it was estimated it could cost the local tourism sector in the region of £24 million to £40 million per annum*.

Since that report was published consultations with EDF and SPR have been on-going. Other perception impact reports have published, most notably EDF's own commissioning of Ipsos Mori for a similar survey published in October 2019 which echoed many of the same concerns.

There have been significant changes since these initial reports were published, most significantly a national pandemic that has harmed the visitor economy and challenged the traditional dynamics of the travel and tourism sector in the UK. The Suffolk Coast has not been unaffected.

Furthermore, as part of the government's commitment towards net zero emissions by 2050, we've seen the emergence of new plans to make the UK a leader in green energy which includes setting a target to up to double the capacity of renewable energy in the next Contracts for Difference auction, which opens in late 2021.

Against this backdrop The Suffolk Coast have asked BVA BDRC to update the 2019 research but with some important variations.

- Offer a deeper comparison between perceptions of the impact of EDF Sizewell C and perceptions of the impact of SPR's two offshore wind farms - EA1N and EA2 and their associated onshore infrastructure rather than focus on the cumulative impact of the two energy projects.



*Results mapped to Economic Impact of Tourism Suffolk Coast & Heaths AONB -2017 report produced by Destination Research.

Methodology – sample recruitment

Effective online research amongst 2000 target visitors to the Suffolk Coast

As in 2019 an online access panel was deployed to reach our target audience. Evolving the screener criteria we recruited only those adults in the UK (not as with the 2019 survey from within a 90-minute drive and in between a 90 and 180 drive time) and who were;

- **At least fairly likely to take a day out or short-break/holiday on the Suffolk Coast in the next two years.**

Panellists were prompted with a description of the Suffolk Coast, unchanged since 2019, from which to base their decision.

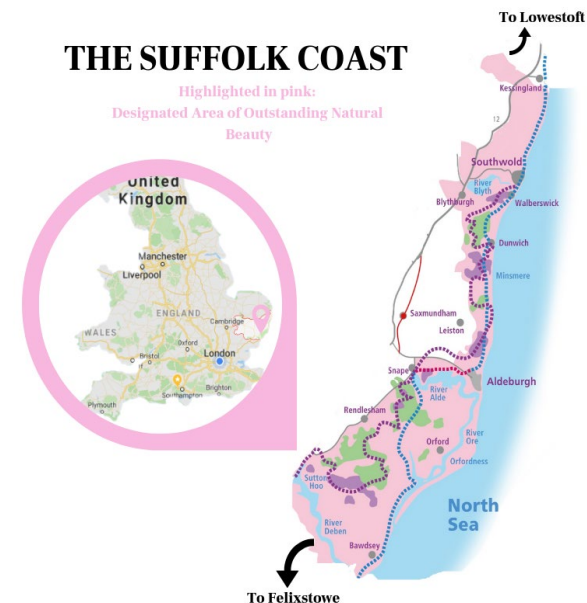
The Suffolk Coast remains a largely undisturbed, wild and beautiful landscape, offering peace and tranquillity to relax and revive in. The rural coastline sits within a designated Area of Outstanding Natural Beauty, where at its heart, the world-renowned RSPB Minsmere Nature Reserve and National Trust managed Dunwich Heath & Orford Ness offer access to some of Britain's rarest wildlife.

Peppered with charming seaside towns, including Aldeburgh and Southwold, the Suffolk Coast offers a wealth of activities and experiences for visitors. It is well served by hotels, camping, caravan and glamping sites, B&Bs, holiday parks and self-catered holiday properties, making it easy for visitors to experience the full Suffolk Coast offer. It is also the location for the Sizewell A & B nuclear power station and visitor centre.

Home to spectacular events such as Latitude, the Aldeburgh Festival, and inspirational composer Benjamin Britten; theatres and galleries play host to a thriving arts, music and culture scene; the sweeping countryside makes a playground for cyclists, walkers and golfers; heath and marshland the perfect spot for nature lovers; seaside resorts, piers and beaches for making family memories; whilst shoppers and foodies are bountifully served by the historic market towns.

Of the 2000 'Prompted Considerators' recruited

- **17%** certain to visit in next 2 years, 31% very likely and 52% fairly likely.
- **86%** were considering a short-break holiday, 64% a days out
- **74%** at least a little awareness of what there was to see and do on the Suffolk Coast, including 16% 'very aware'
- **60%** were previous visitors to the Suffolk Coast, 39% for days out 41% for a short-break/holiday



Methodology - introducing the Projects

Monadic testing

Development plans for EDF Sizewell C and SPR Wind turbines with construction of onshore infrastructure were presented to respondents with the stimulus shown below and opposite. Both had been updated from stimulus shown in 2019

After reviewing each stimulus respondents were asked to re-consider their propensity to visit the Suffolk Coast in light of the information shared.

To avoid survey bias half of the sample responded first to the stimulus for SPR and half to the stimulus for EDF first – known as monadic testing.

Stimulus for SPR wind turbines with construction of onshore infrastructure

ScottishPower Renewables (SPR) plans to build two offshore wind farms - East Anglia One North (EA1N) and East Anglia Two (EA2) in the southern North Sea. The proposed offshore windfarm site to be developed by EA1N, is located approximately 36km from its nearest point to the port at Lowestoft and 42km to Southwold. The project would have an operational capacity of up to 800MW, which is enough to power approximately 660,000 UK households.

The proposed offshore windfarm site to be developed by EA2, is located approximately 32.56km from its nearest point to the coast at Southwold and 37.02km to the port of Lowestoft. The project would have an operational capacity of up to 900MW, which is enough to power approximately 800,000 UK households.

Offshore infrastructure off the Suffolk Coast will comprise

- 142 turbines covering an area of 426km
- 8 offshore platforms to collect the electricity, 2 maintenance platforms and 2 meteorological masts.

Onshore infrastructure on the Suffolk Coast will comprise

- A 9 km cable corridor
- Two onshore substations with equipment up to 18m in height, the substations will cover an area of 72,000m²
- One National Grid Substation with a maximum height of 16m and a maximum footprint of 14.5m x 3.10m.

CABLING

Cable landfall from the wind farms is to take place at the tourist destination of Thorpeness. The below illustrative maps show the size and scope of the 9 km cable corridor from Thorpeness to the sub-stations at Friston.

The cable corridor passes through

- The Suffolk Area of Outstanding Natural Beauty (AONB)
- The Suffolk Coastal Path
- The Sandlings Walk and The Sandlings SPA (Special Protection Area),
- The Leiston-Aldeburgh Site of Special Scientific Interest (SSSI).

The opposite image is an example of a cable corridor. The cable corridors for SPR's projects will be around 32 metres wide each.

SUBSTATION SITE AT FRISTON

The opposite image, taken from SPR shows a possible layout of the National Grid substation the substations for EA1N and EA2 at Friston. T scale of the site is around 30 acres.

Friston is a medieval countryside village with no industrialisation. The boundary of SPR's site comes right down to the Church Road. Friston Church, St Mary the Virgin, would be adjacent to SPR's site.



Stimulus for EDF Sizewell C

Please click to watch this video



The Application is for development consent to construct, operate and maintain the proposed Sizewell C nuclear power station, which would comprise two UK EPR™ reactor units with an expected net electrical output of approximately 1,670 megawatts per unit, giving a total site capacity of approximately 3,340 megawatts, along with associated development required for the construction, operation or maintenance of the Sizewell C nuclear power station or to mitigate its impacts.

The Sizewell C nuclear power station would be located in Sizewell in East Suffolk, approximately halfway between Felixstowe and Lowestoft; to the north-east of the town of Leiston.

Sizewell C and associated development site boundaries are shown on the map opposite

Figure 1.1: Sizewell C Project, Suffolk



Sizewell C will supply power to 6 million homes and generate electricity for 60 years.

Taken from EDF's latest consultation document the indicative construction site for Sizewell C can be viewed in more detail opposite.

Construction and temporary development

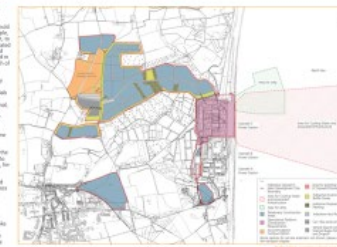
Some land within the proposed station site would be needed during construction. For example, to store building materials and equipment, to support the construction of the station and to support the construction of the station.

A temporary site to allow delivery of any large tank, vessel or bulk construction materials, to be used for the construction of the station, to be used for the construction of the station.

Some temporary buildings would be required during construction to provide storage for the construction materials and equipment.

To enable the proposed Sizewell C site for development, some work will need to be done before construction of the station.

Some temporary buildings and early site preparation.



See appendix for stimulus in larger scale



Headline impact of energy projects on Suffolk Coastal tourism



Perception that construction of SPR wind turbines and their onshore infrastructure nearly as likely as EDF Sizewell C to discourage visitors

Likelihood to visit the Suffolk Coast during construction

Net: more likely
minus net: less likely



■ A lot less likely to visit ■ A little less likely to visit
■ No more/no less likely to visit ■ A little more likely to visit
■ A lot more likely to visit

- The position remains relatively unchanged compared with 2019 with most people no more/no less likely to visit the Suffolk Coast because of either of the energy projects.
- With some visitors encouraged by the developments and a significant minority deterred, there exists challenge and opportunity for coastal tourism during the construction phase.

To gain a richer perspective as to why visitors propose to react the way they indicate in the survey we asked them to explain their answer in their own words. See next slide.....

C2a. Now that you are aware of the plans for (Insert either 'Sizewell C' or 'SPR wind turbines with construction of onshore infrastructure'), whilst the infrastructure is being built do you think you are more or less likely to visit the Suffolk Coast for days out or a short-break / holiday? Base: All 'Prompted Considerators' n=2000

A third less likely to visit Suffolk Coast during construction. Why?

Many believe the construction of the energy projects will take away their reasons for visiting the Suffolk Coast in the first place – the tranquillity, the natural surroundings; and this concern needs to be countered. Some are in principle opposed to either wind turbines or nuclear power stations and wish to make a stand. Others expect travel disruption to spoil their holiday experience.



30% net: less likely to visit



34% net: less likely to visit

SOME RECURRING REASONS FROM REVIEW OF OPEN ENDS – ‘IN THEIR OWN WORDS’

It will definitely detract from the area and although I can see the long term benefits it seems there could be a solution that doesn't involve disturbances to the AONB and the church

I would not like to holiday whilst all of this work is ongoing. Also that seems a lot of turbines to spoil the views

The construction may ruin the natural environment and cause air and noise pollution.

I don't think it will be as quiet and tranquil as I first thought which was the reason I was considering visiting.

Wind farms are ugly and will spoil the scenery

The original attraction of visiting the area was the unspoiled natural surroundings and with this development it will not be the same.

Could be many heavy lorries driving around

I don't want my experience to be ruined by a huge power station.

Something to consider against other places that don't have this when visiting. It may effect the beauty of the area.

Travel disruptions on the roads carrying heavy equipment could spoil my holiday if I was unaware of the dates of possible disruption

Sounds unnatural and dangerous, sounds polluting... I don't want to go anywhere near a nuclear plant!

This is the area I wanted to visit for the nature. The construction will spoil that.

I am utterly against this being built. It is dangerous and I do not fall for it creates jobs etc. What are they planning on doing with the nuclear waste It is also too close to the RSPB site for wildlife and we need to protect it.

C2a. Now that you are aware of the plans for (Insert either 'Sizewell C' or 'SPR wind turbines with construction of onshore infrastructure'), whilst the infrastructure is being built do you think you are more or less likely to visit the Suffolk Coast for days out or a short-break / holiday?. Why do you say that? Base : All 'Prompted Considerators' less likely to visit during construction of each?

Both Sizewell C and SPR wind turbines considered a deterrent to visiting the Suffolk Coast for many. Sizewell C considered the bigger deterrent.

Propensity for energy developments to deter visitors and others like them.

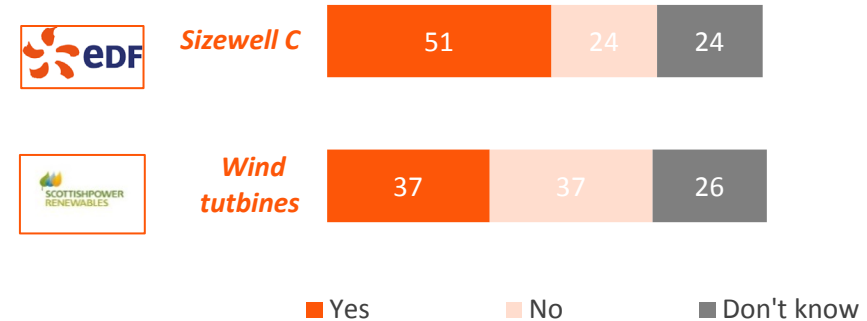
DETER YOU

	% (2019 in brackets)
EDF Sizewell C	19 (24)
SPR Wind turbines	12 (7)
Both equally	34 (33)
Net: Any deterrence	65 (64)
Neither will	24 (19)
Don't know	10 (17)

C6. Which of the two proposed developments will have a greater impact on deterring you personally from visiting the Suffolk Coast? Base: All n=2000

- There is a perception that, whilst not as much of a deterrent as Sizewell C, SPR wind turbines construction may be more of a deterrent to visiting than when they were presented two years ago. The presentation in 2021 was more detailed.

DETER OTHERS LIKE YOU



D3. And do you think these developments will deter other people like you from visiting the Suffolk Coast for days out and short-breaks and holidays? Base: All n=2000

- As many visitors believe SPR wind turbines to be a deterrent to others as those that believe they won't. This reflects the divisive nature of wind turbine developments more generally. However more than half of all respondents believe EDF Sizewell C will be a deterrent to others.

Engagement with energy developments



Majority of those considering visiting unaware of either energy project.

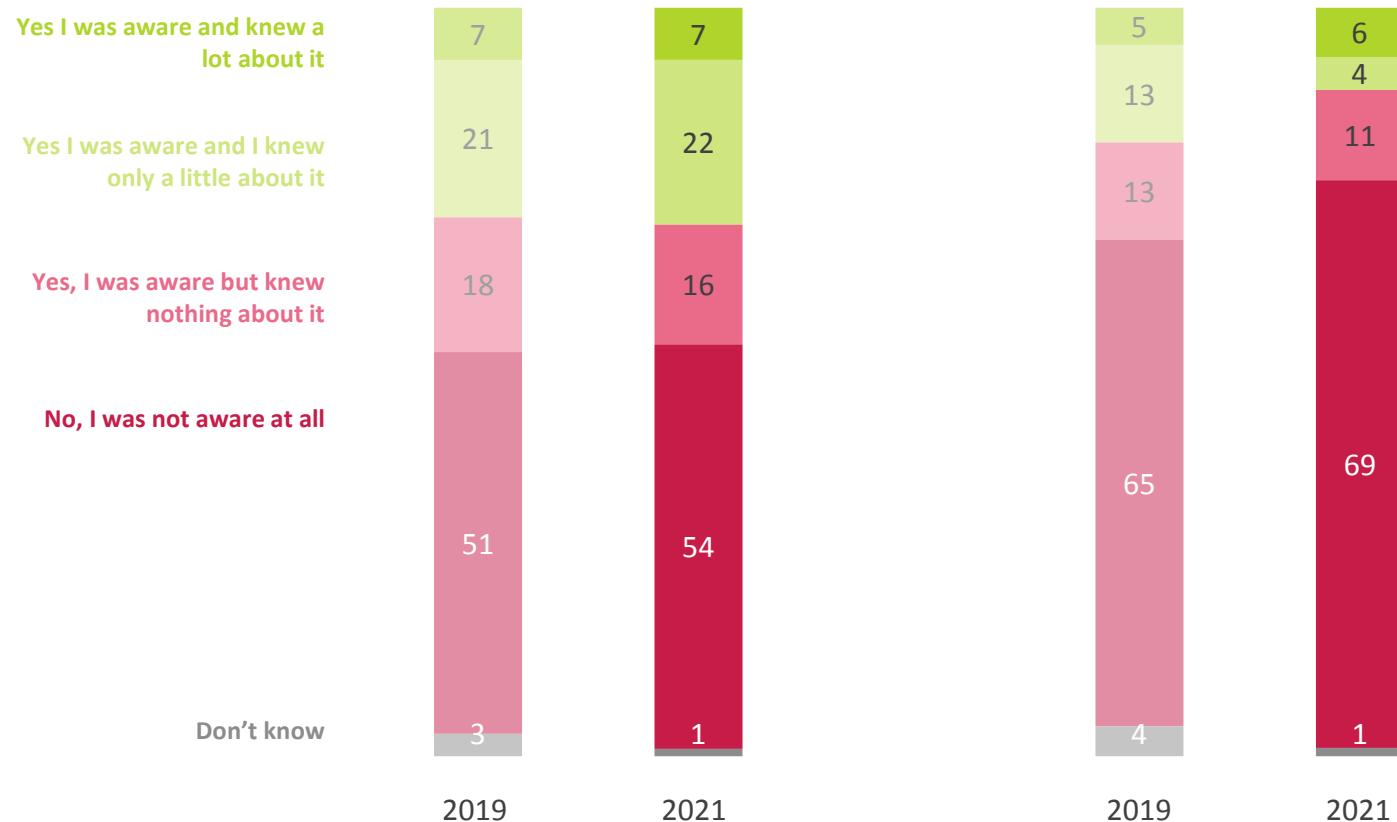
Awareness of EDF & SPR energy projects



Sizewell



Wind turbines



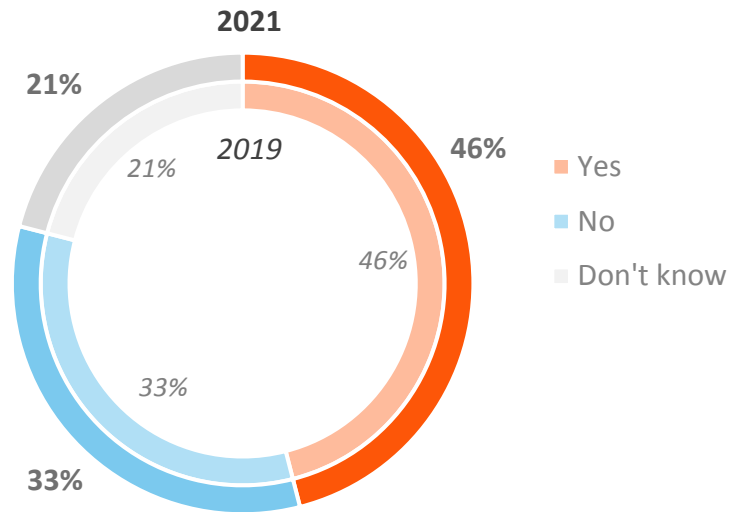
- Highlights importance of reassuring potential visitors they should still consider the Suffolk Coast once national attention turns to the energy projects in the coming years

C1 Were you aware of the development plans for (Insert either 'Sizewell C' or 'SPR wind turbines with construction of onshore infrastructure'), before now? Base All respondents (n=2000)

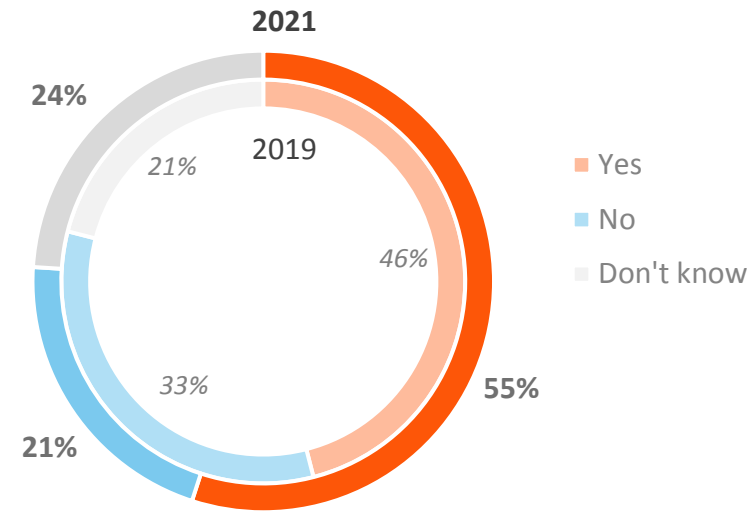
Future visits post construction

Similar long-term disruption compared to overall two years ago.

Days out



Short break/Holiday



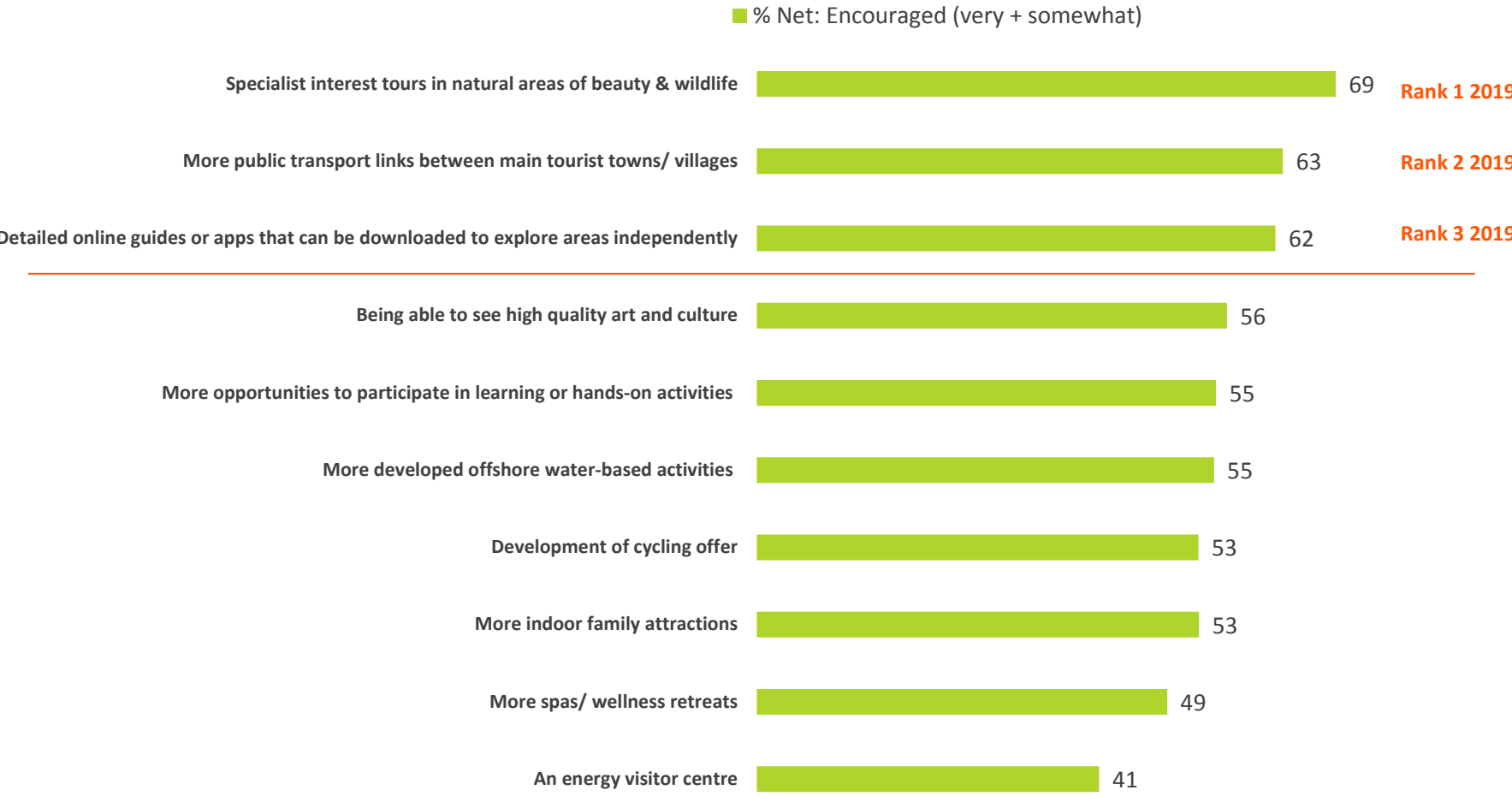
D1. Once the construction of Sizewell C and the wind turbines and their onshore infrastructure are completed in 9 to 12 years, is the Suffolk Coast somewhere you would consider visiting? Base All respondents n=2000

Future trip planning, by different target audiences



Specialist interest tours, better public transport links and online guides remain stand out initiatives encouraging more frequent and longer visits

Top 3 initiatives to encourage more visits to Suffolk Coast

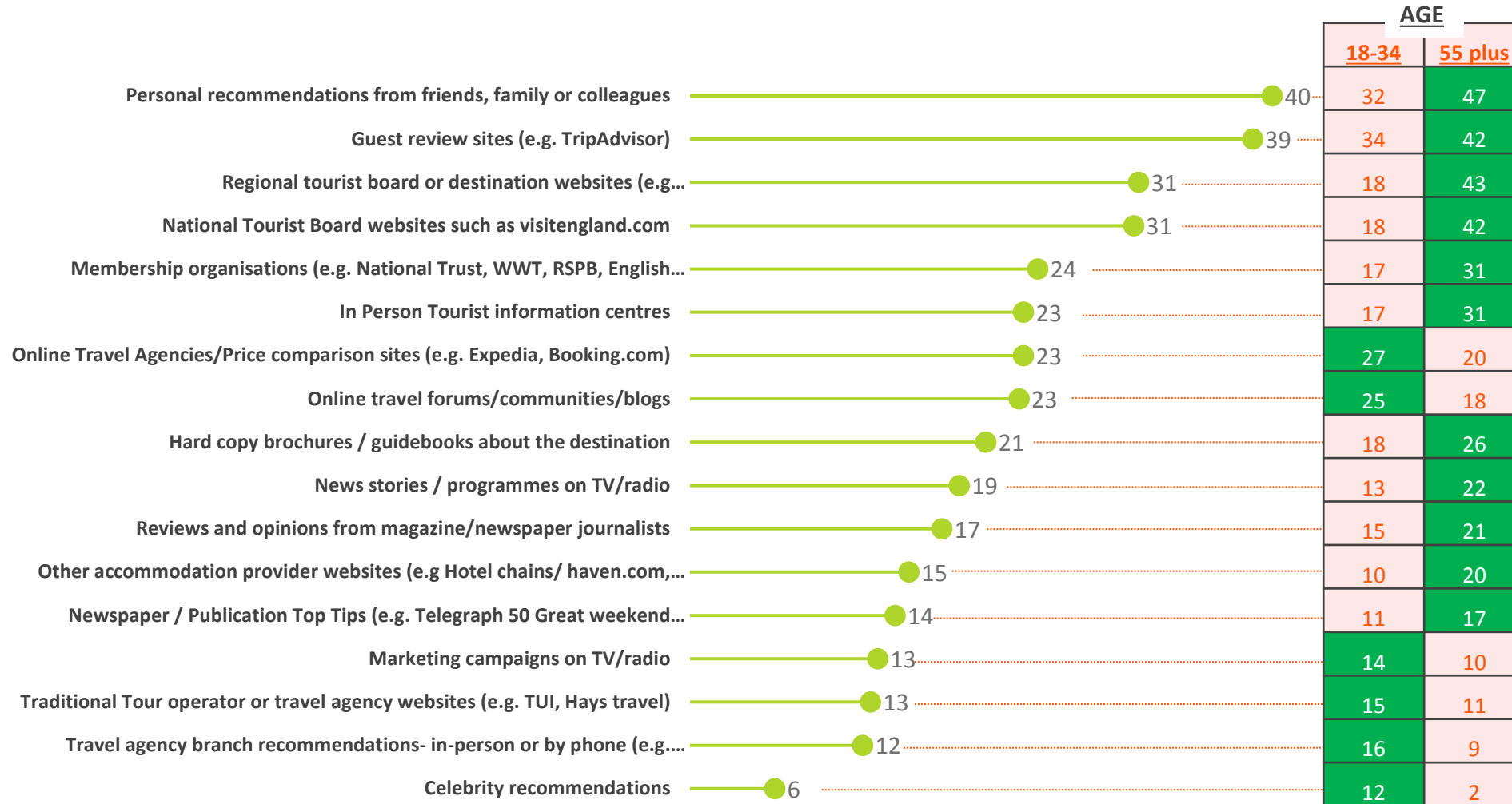


- The top 3 initiatives particularly appeal to older audiences
- Amongst younger audiences there is more equal support for all initiatives (e.g. 58% of 16-34s encouraged by specialist interest tours in natural areas same as % encouraged by indoor family attractions and offshore water-based activities)

EAll1. In encouraging you to visit The Suffolk Coast more often and for longer in the future how encouraging / discouraging are the following to you? Base: All respondents (n=2000)

Suffolk Coast need to tailor communications via most appropriate marketing channels for each audience

Most useful information sources when planning trips

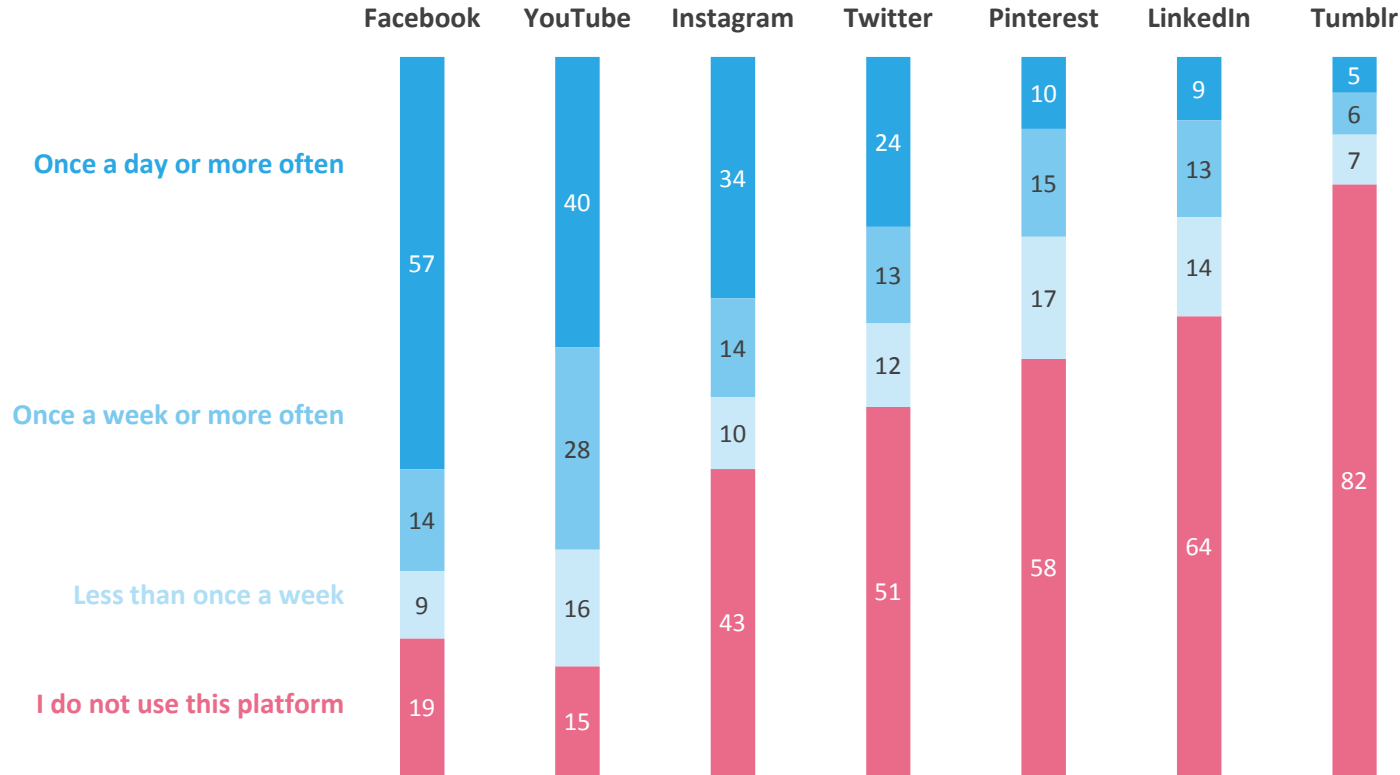


- Highlights importance of optimising online web presence of www.thesuffolkcoast.co.uk & Visit England, second only to recommendations/reviews in being sources most useful to target visitors.
- Significant differences in what younger and older audiences find most useful when choosing destinations to visit

New F2 In choosing where to go for domestic days out or short breaks what information sources do you find most helpful? Base All respondents n=2000

Engaging visitors on social media is important to promoting the Suffolk Coast

Facebook and YouTube are the dominant social media channels used regularly by target audiences



Social media channel	% Used daily	
	16-34 yr olds	55 plus
Facebook	58	54
YouTube	60	22
Instagram	63	11
Twitter	30	14
Pinterest	16	5
LinkedIn	12	4
Tumblr	10	1

- The most popular daily used social media channel for younger audiences is now Instagram, not Facebook or YouTube.

NEWF3 Which social media platforms do you use, and how often? Base : All respondents n=2000

Appendix -



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Construction and temporary development

Some land near the power station site would be needed during construction, for example, to store building materials and equipment, to assemble components and to store excavated material. Our plan for the use of the land adjacent to the proposed new access road in the Soons Hill area and on land east of the Soons Hill and around Ash Wood.

A temporary jety to allow delivery of very large loads, instead of bulk construction materials, and export of excavated material by sea would also be necessary for construction. Over Sizewell C is a regional, very large item known as Abnormal Inland Loads (AIL) of might occasionally need to be brought in – for example to replace a major piece of equipment. This might require permanent retention of some elements of the jety.

In addition, we propose to use land near the existing jetty in Leiston, immediately to the east of the Suffolk Industrial Estate, for construction purposes.

Two temporary bridges would be required during construction to provide access across the A14 watercourse and between the construction area and the main power station area.

In order to prepare the Sizewell C site for development, some works will need to take place before construction of the power station starts. This includes the relocation of some Sizewell B buildings and early site preparation.



Quality / accreditation



We are ISO 20252:2012 and ISO 27001:2013 certified, the recognised international quality standards for market research and information security.

- Adherence to the standard is independently audited once per year.
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252 and 27001.

All work will be carried out in conformity to these standards, the MRS Code of Conduct, and all relevant legal requirements

Statistical Difference

This research was designed to ensure robust sample sizes for analysis.

As the survey is conducted with a sample of the target audience, we cannot be 100% certain that a census of the whole population would yield the same results.

We can be 95% certain that the actual figure (in the population as a whole) falls within a certain range of the survey figure.

The percentages within the table represent the error variance.

	Survey finding of...		
Base	5 / 95%	20 / 80%	50 / 50%
Total Sample (n=2000 All Unprompted Considerators)	+/- 0.96%	+/- 1.75%	+/- 2.19%
Subgroup 1 (n= 753 - All 55yrs plus)	+/- 1.56%	+/- 2.86%	+/- 3.57%
Subgroup 2 (n= 555 - All 16-34 years)	+/- 1.81%	+/- 3.33%	+/- 4.16%