



## **WRITTEN REPRESENTATION FOR SPR EA1N and EA2 PROJECTS (DEADLINE 13)**

**Interested Party:** The Suffolk Coast Destination Management Organisation Ltd (TSC)  
**PINS Refs:** 20024735 & 20024732

**Date:** 5<sup>th</sup> July 2021

### **New research into the impacts of the EA1N and EA2 projects on the visitor economy**

TSC's 2019 tourism impact survey, carried out by consultants BVA BDRC (hereafter BVA), has been referred to in numerous hearings and submissions.

In June 2021, TSC commissioned the same consultants to carry out additional research to update the original report. The data has now been collected, and some headline findings are enclosed in a short summary prepared by BVA, ahead of the release of the full report in due course.

Since 2018, TSC's greatest concern has been the cumulative impact of all the proposed energy projects, most notably Sizewell C and the onshore infrastructure connected with SPR's EA1N and EA2 projects. However this recent extra research has measured the impacts of the projects separately, to make it even easier to disaggregate the findings.

The fresh findings leave TSC in no doubt that the onsite infrastructure proposals will harm local tourism, perhaps by 15% / £30M pa.

The applicant's consultant Mr Clearly has been critical of some of the methodology employed by BVA in the first report, specifically that respondents were asked about their own choices and behaviours. Whilst BVA vigorously defend their methodology, also used by Ipsos Mori acting for EDF Energy, BVA has responded to this criticism and took this recent opportunity to ask respondents how they thought others would behave. The results were even more concerning; 37% of respondents believed the construction of SPR wind turbines and their onshore infrastructure would also deter other people like them from visiting the Suffolk Coast for days out, short-breaks and holidays.

The applicant has also been critical of the stimuli contained in the original survey, suggesting that it lacked context. BVA took extra care to ensure that the stimuli materials contained in the updated survey contained appropriate context.

The applicant's suggested 'Tourism Fund' of £150K is a wholly inadequate mitigation for the harm that would be caused to local businesses. TSC is reassured by its understanding that this fund, which was not negotiated by TSC, cannot be given any weight and may not be taken into account by the ExAs.

Please see below a summary of the updated research.

Harry Young, Chairman of The Suffolk Coast DMO

### Summary of New Commissioned Research

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.

With fewer people prepared to consider visiting during construction of the energy developments the initial findings were very concerning.

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 obviously a national pandemic that has castrated 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 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 developments
- Gain a greater understanding of potential visitors' attitudes to nuclear and wind power.

### Methodology

An online access panel was deployed to reach our target audience. Evolving the screener criteria slightly since 2019 we recruited only those adults in Great Britain who were

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

Fieldwork took place between June 22<sup>nd</sup> and June 29<sup>th</sup> 2021.

Panellists were prompted with a description of the Suffolk Coast, unchanged since 2019, from which to base their decision. Of the 2000 'Prompted Considerators' recruited

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

Development plans for EDF Sizewell C and SPR Wind turbines with construction of onshore infrastructure were presented to respondents. 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.

## 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 72,000m<sup>2</sup>
- One National Grid Substation with a maximum height of 16m and a maximum footprint of 145m x 310m.

### 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.



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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. The 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.



BVA BDRC

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

### Headline findings

Whilst we build out the final report there are some key findings of interest in relation to SPR from the overall sample.

## The construction of SPR wind turbines and their onshore infrastructure is nearly as likely as EDF Sizewell C to discourage visitors during the construction phase.

- 30% are net: less likely to visit during construction of onshore infrastructure whereas just 15% were net: more likely to visit. This results in a net: negative position of -15 for SPR. EDF's Sizewell C's net: negative position was -19.
  - The majority are unlikely to be put off visiting the Suffolk Coast by the construction of SPR wind turbines and the development of onshore infrastructure, assuming it will be localised and won't affect too much their enjoyment of the wider Suffolk Coast. However a minority of visitors are discouraged. These individuals believe their visit will be disrupted by noise, traffic delays and diversions whilst unsightly construction will ruin the views and the peace and quiet they are looking for.
- 37% believed the construction of SPR wind turbines and their onshore infrastructure would also deter other people like them from visiting the Suffolk Coast for days out, short-breaks and holidays
- With fewer people prepared to consider visiting during construction of SPR wind turbines and their onshore infrastructure, fewer trips will happen. Our analysis of SPR wind turbines in isolation indicates this could cost the tourism sector up to £30.4 million per annum\*.

*\*Source Economic Impact of Tourism Suffolk Coast & Heaths AONB -2019 produced by Destination Research. Calculations assume consideration of days out and holidays at outset equals current volume of trips generating current volume of trip spend. Assumes all prompted considerators likely to visit in next 2 years are equal.*

**If the projects are to go ahead, there is agreement that financial support should be given to the Suffolk Coast.**

- 65% agree tourism on the Suffolk Coast needs significant financial support to promote itself whilst these developments (SPR and EDF) are being constructed, 27% strongly agree.

**Potential visitors support the development of wind farms on the Suffolk Coast even if it puts a minority of them off visiting during the construction phase.**

- 55% agree that the positives of having wind turbines constructed off the Suffolk Coast outweighs the negatives.
- 45% agree that they would like the opportunity to go out and visit the wind turbines off the Suffolk Coast when they are completed
- Although 23% agree with the statement '*SPR should cancel their current plans to develop wind turbines off the Suffolk Coast*' more people actually disagree with the statement (37%)

**This evidence supports the hypothesis that, as consumers of electricity, on the whole tourists support solutions to the UK's clean energy challenge. A concerning number will be deterred from the Suffolk Coast, choosing to take their holiday elsewhere.**