

# The Energy Coast

Implications, impact & opportunities for tourism  
on the Suffolk Coast





# Scope of research

Commissioned to independently evaluate the impact energy developments will have on the Suffolk Coast from a tourism perspective.

## Methodology

### Regional day trip & holiday market

Online representative mix of 0-90 & 91-180 min drive-time

*1,700 responses*

### In-situ leisure visiting market

Face to Face in Aldeburgh, Snape Maltings & Southwold

*69 responses*

### Business Survey

Online & telephone from Suffolk Coast DMO

*113 responses*

## Evaluating

- Motivations for visiting the Suffolk Coast and current behaviour.
  - Awareness of Suffolk Coast offer and the proposed developments
  - Evaluation of how and why proposed developments will affect propensity to visit the Suffolk Coast for holidays and day trips
  - Impact of 'Energy Coast' brand on longer term propensity to visit the Suffolk Coast.
  - Initiatives that could be developed to mitigate the impact of the energy developments on tourism on the Suffolk Coast
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- Thoughts on the energy developments and their impact on tourism to the Suffolk Coast
  - Predicted impacts on staffing, turnover and occupancy rates.

# Stimulus

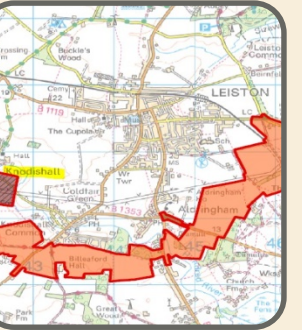
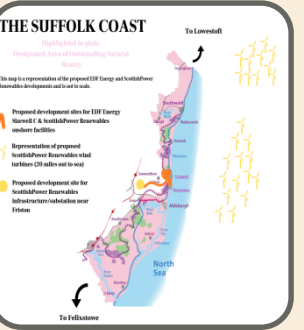
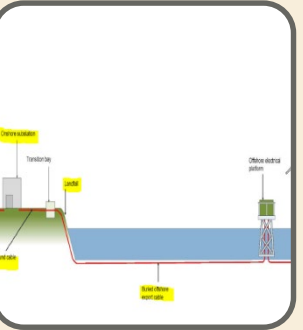
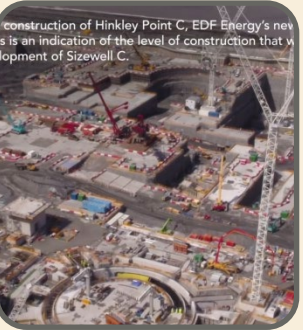
Respondents were showed seven stimuli:



The Suffolk Coast remains a largely undisturbed, wild and beautiful landscape, offering a unique opportunity 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 Minmere Nature Reserve. The Suffolk Coast Trust managed Dunwich Heath & Orford Ness offer access to some of Britain's most beautiful landscapes.

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, holiday homes, and glamping sites, B&Bs, holiday parks and self-catered holiday properties, offering a range of accommodation options for visitors to experience the full Suffolk Coast offer. It is also the location for the Sizewell C power station and visitor centre.

Spectacular events such as Latitude, the Aldeburgh Festival, and Inspirational Britain; theatres and galleries play host to a thriving arts, music and culture scene. The Suffolk countryside makes a playground for cyclists, walkers and golfers; heath and moorland are a great spot for nature lovers; seaside resorts, piers and beaches for making family memories. Pubs and foodies are bountifully served by the historic market towns.



In the initial part of the survey, respondents were shown a map of the Suffolk Coast, and its location within the UK. This framed the rest of the survey.

Next, respondents were shown a text describing the attractions and attributes of the Suffolk Coast in order to assess the attractiveness of the region.

Respondents were shown a 46 second video which featured views of the Suffolk Coast, RSPB Minmere as well as the construction of EDF's Hinkley Point C plant. This helped to facilitate understanding of the scale of EDF's plans.

In the third segment of the survey, respondents were shown the graphic above in order to help them visualise the onshore cabling infrastructure for the proposed SPR project.

In the same segment, respondents were shown a map (not drawn to scale) highlighting the location of the proposed EDF Sizewell C and SPR's onshore cabling and wind farms.

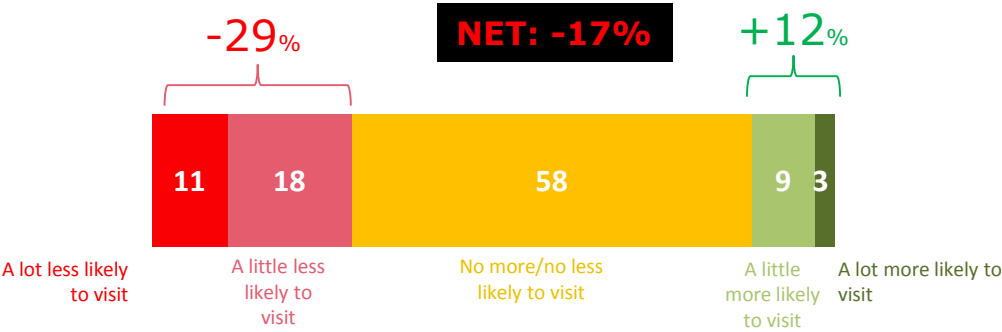
Respondents were also shown a map sourced from EDF showcasing the location of the proposed Sizewell C development.

A map sourced from SPR was also shared highlighting the location of the onshore cabling and inland station for its proposed offshore wind farms.

# Findings snapshot

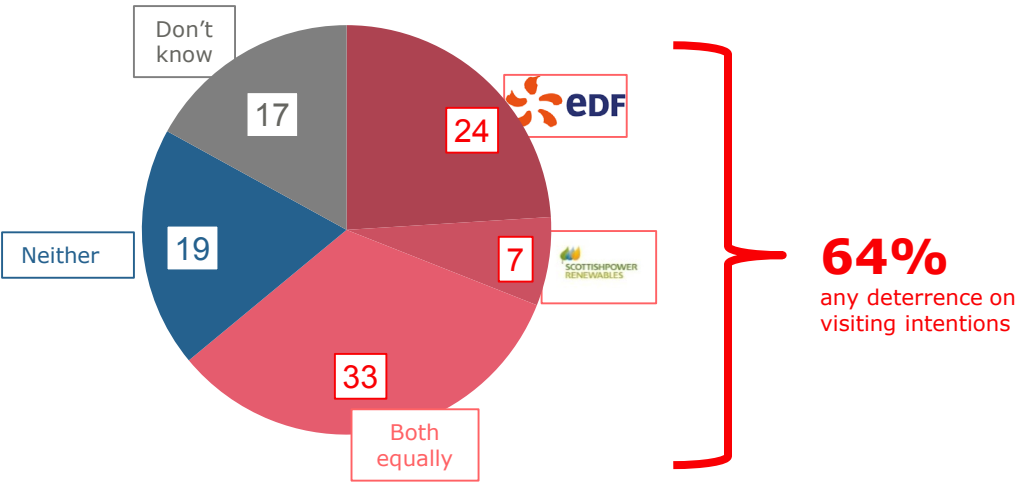
## Visitors deterred from visiting

Now that you are aware of the plans for Sizewell C and the 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 holiday?



## Both developments deter visitors

Which of the two proposed developments will have a greater impact on deterring you personally from visiting the Suffolk Coast?

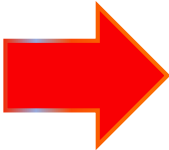
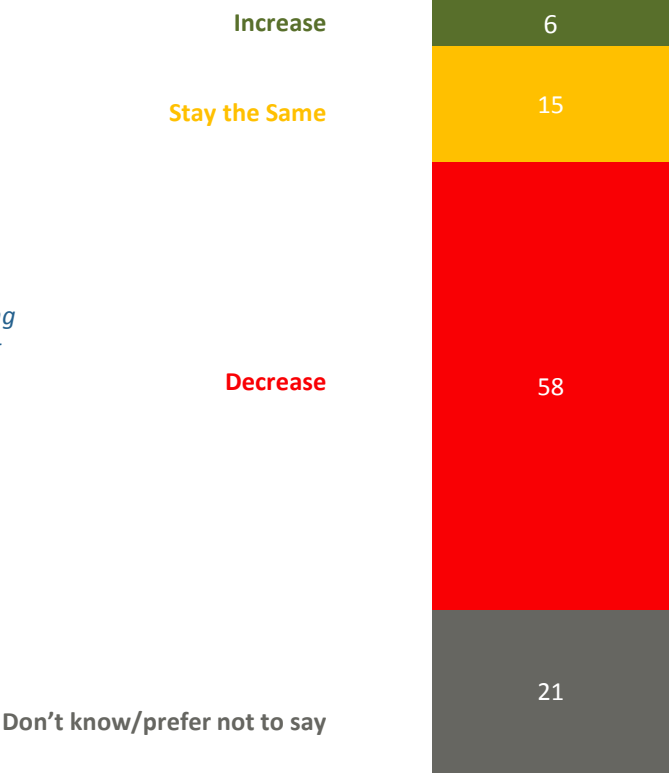


Base (n=1700) All regional market

# Findings snapshot (2)

## Business Pessimism

*All other things being equal, what do you think the impact will be on your annual turnover during this 9-12 year period of construction, as a direct result of the development?*



- **85%** expect their revenue to fall by at least 20% per annum
- Accommodation providers feel particularly vulnerable.



# Findings snapshot(3)

## Energy developments will have a negative economic impact on tourism on the Suffolk Coast

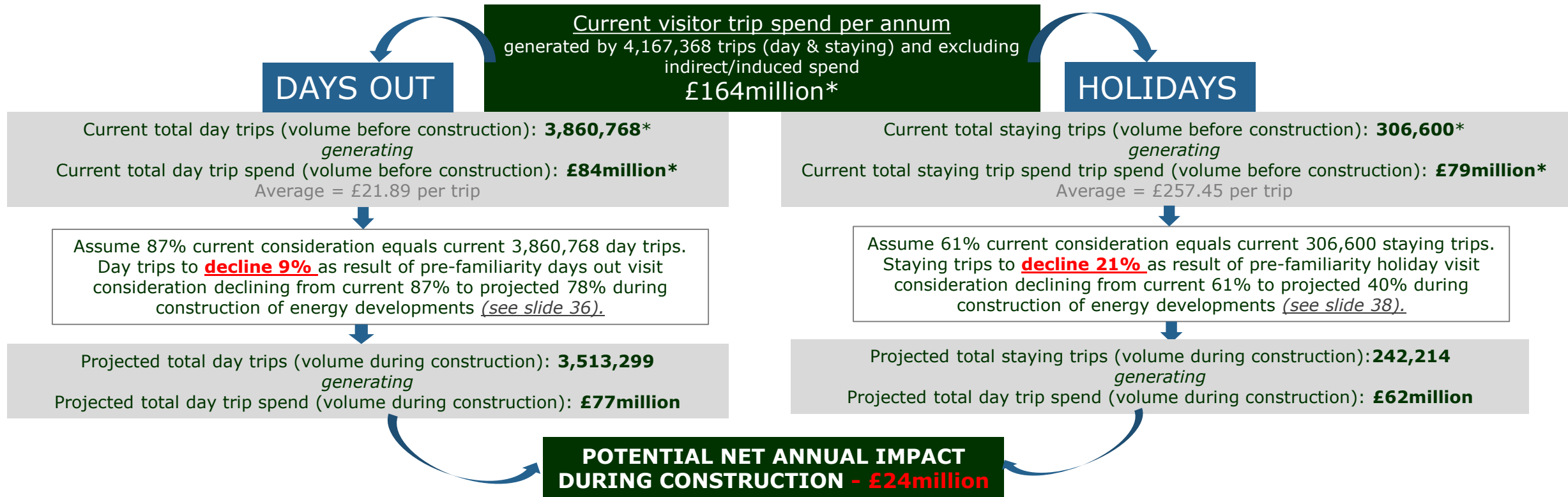
- With fewer people prepared to consider visiting during construction of the energy developments, fewer trips will happen. Our analysis indicates this will cost the tourism sector at least **£24million per annum\***.
- Projecting our core analysis further we can calculate that at least **400 full time equivalent local jobs are at risk** from the energy developments, all other things being equal.



\*Results mapped to Economic Impact of Tourism Suffolk Coast & Heaths AONB -2017 report produced by Destination Research. Above calculation places the weight on feedback only from individuals already familiar with the Suffolk Coast. i.e. they had already been on at least one day out or holiday to the Suffolk Coast AND were "At least somewhat aware of what there is to see and do on the Suffolk Coast" AND were "Aware and knew at least a little about developments at both Sizewell C and SPR" prior to completing the survey. It is based on the cumulative impact of a 9% decline in day visits and 21% decline in holiday visits from this audience. A higher figure of £35 million would have been the calculated loss had all regional respondents been equally weighted

# Summary: Annual Economic Impact during construction

Decline most acute amongst the holiday market.



*As comparators*

**'All unprompted considerators'** = -22% for Days Out and - 27% Holidays leading to a potential worse case annual net: impact on direct visitor spend of **-£40million**  
**'All online regionally representative market'** - 21% for Days Out -22% for holidays leading to a potential worse case annual net: impact on direct visitor spend of **-£35million**

\*Source Economic Impact of Tourism Suffolk Coast & Heaths AONB -2017 produced by Destination Research



# Findings snapshot (4)



## Fears of an East Coast brand dominated by energy

- Suffolk competes regionally for domestic coastal tourism
- Fear that with limited brand salience of current offer the area will become known more for its concentration of energy developments than for its wild and natural beauty.
- Only 10% of the regional market are encouraged by energy coast branding, nearly half are put off by it.



**Battle to win over the hearts and minds of potential visitors**



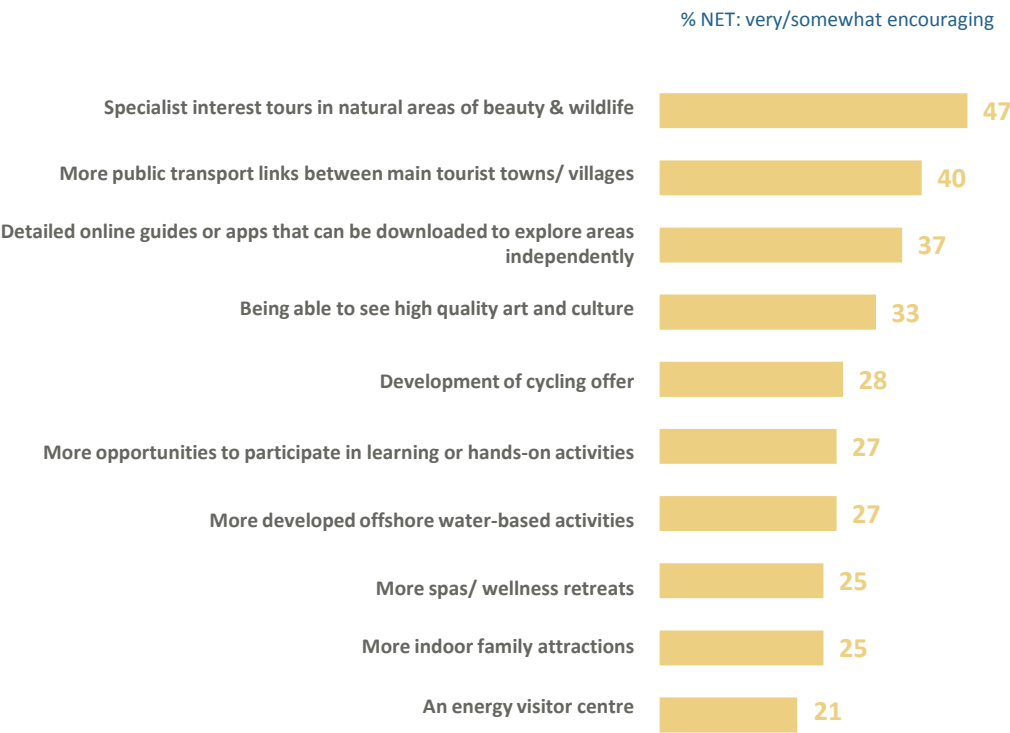
# Findings snapshot (5)

## Some opportunities for the Suffolk Coast

Alongside increased marketing of the destinations traditional assets, there exists opportunities for targeted tourism investment to encourage additional visits, despite the energy developments.



Which, if any, of the following developments would encourage you to visit the Suffolk Coast more often or stay for longer in the future?



Base (n=1700) All regional market

■ All Regional market

**The Executive Summary and Full Report can be found here:**

<https://www.thesuffolkcoast.co.uk/tourism-research-and-reports>

# Accreditation



BVA BDRC is certified to ISO 20252 and 27001, 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
- Full methodological details relevant to the project and a full report are available upon request



# Statistical Difference

This research was designed to ensure robust sample sizes for analysis. As the online survey is conducted with a sample of the target audience (nationally representative), 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.

Example Bases	5 / 95%	20 / 80%	50 / 50%
Total Sample (1,700)	+/- 1.0%	+/- 1.9%	+/- 2.4%
Male (850)	+/- 1.5%	+/- 2.7%	+/- 3.4%
Female (850)	+/- 1.5%	+/- 2.7%	+/- 3.4%
16-24 (187)	+/- 3.1%	+/- 5.7%	+/- 7.2%
25-34 (294)	+/- 2.5%	+/- 4.6%	+/- 5.7%
35-44 (267)	+/- 2.6%	+/- 4.8%	+/- 6.0%
45-54 (309)	+/- 2.4%	+/- 4.5%	+/- 5.6%
55-64 (257)	+/- 2.7%	+/- 4.9%	+/- 6.1%
65+ (387)	+/- 2.2%	+/- 4.0%	+/- 5.0%