The Energy Coast

Implications, impact & opportunities for tourism on the Suffolk Coast

April 2019

BVA BDRC

Report contents

Introduction

Suffolk Coast: Energy Developments Set To Transform the Landscape

The Suffolk Coast is a renowned year-round holiday destination known for its stunning coastline, idyllic countryside, native wildlife as well as its quaint villages and market towns.

Designated as an Area of Outstanding Natural Beauty (AONB), the area is highly dependent on tourism, and in 2017 it generated **£210 million for the local economy. ***

However, two major energy infrastructural developments are envisaged to transform the landscape and disrupt businesses in the coming years.

EDF Energy (EDF), which operates the existing Sizewell B nuclear power station on the Suffolk Coast, is in the midst of a public consultation for Sizewell C, a new nuclear power station to be built. Work is due to start in 2021.

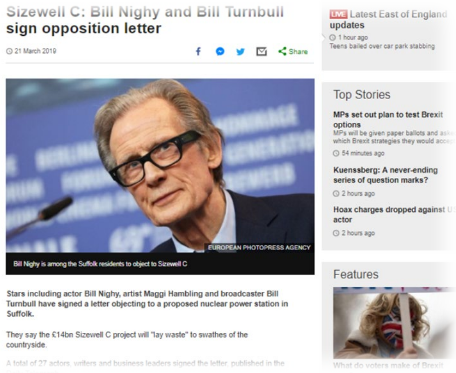
ScottishPower Renewables (SPR), which is planning to site onshore infrastructure for its offshore wind farms off the coast of East Anglia, also has plans in development, and is in the midst of its own consultations.

There are fears the construction of both energy developments will disrupt the peace and tranquillity the area is known for, and in the process, weaken tourism demand and undermine the livelihood of locals in the region.

BVA BDRC were commissioned to evaluate the impact these energy developments will have on the Suffolk Coast from a <u>tourism perspective</u>.

This independent study will enable stakeholders to understand why tourists choose to visit the Suffolk Coast and the potential effect on tourism of the two energy projects.

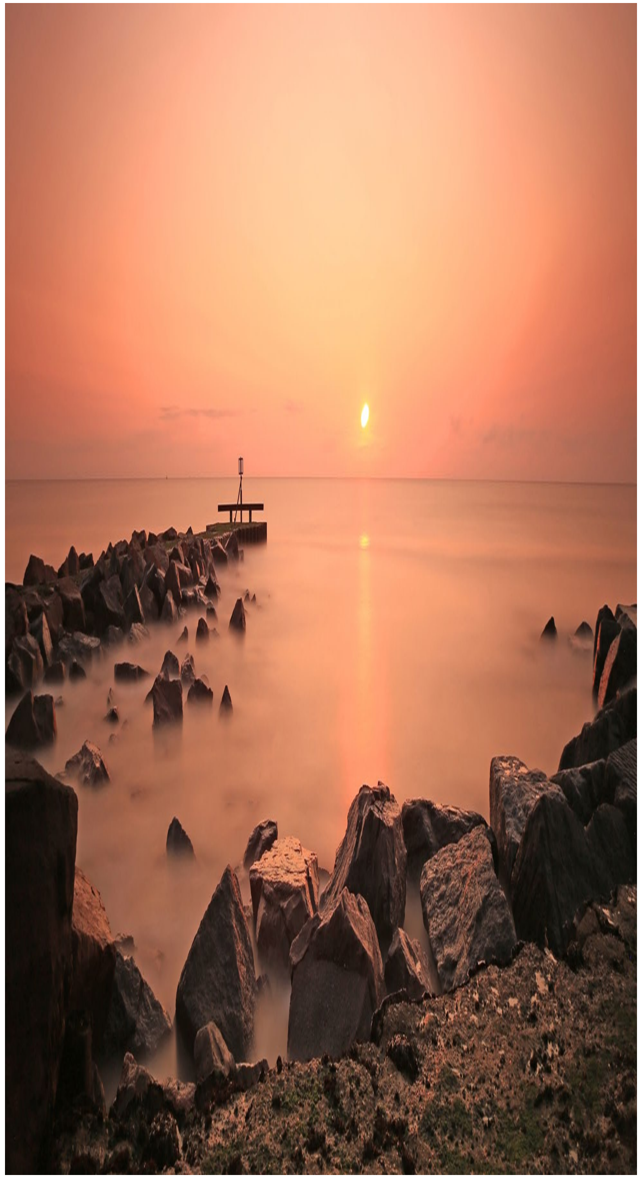
It also explores practical mitigations to manage the overall impact.



*Source: *Economic Impact of Tourism Suffolk Coast & Heaths AONB -2017 £210 million (Combined day trips and overnight trips)*

Research Objectives

The project incorporated two separate surveys



Visitor Survey (Actual & Potential Regional Visitors)

- Uncover perceptions of the Suffolk Coast including motivations to visit for both overnight tourists and day trippers.
- Understand recent visiting behaviour to the Suffolk Coast including length of stay, accommodation, distance travelled, and demographics.
- Understand the competitive market - other destinations considered as alternatives to the Suffolk Coast.
- Identify the activities associated with a visit to the Suffolk Coast.
- Measure awareness of the Suffolk Coast offer and the proposed developments.
- Evaluate how and why proposed development will affect propensity to visit the Suffolk Coast for days out and holidays, during construction & once operational.
- Discover how the emergence of the 'Energy Coast' brand will affect the long term propensity to visit the Suffolk Coast.
- Pinpoint product developments (if any) that could increase the frequency and length of visits.

Tourism Business Survey

- Understand local business views on EDF development and SPR's wind farm proposals - how they perceive it will affect their tourism and visitor related businesses, both during the construction phase and in the longer term.
- Identify the key motivations for tourism visits to the Suffolk Coast and to determine the characteristics that make the area unique and special within a tourism context.
- Understand business views on the Suffolk coast becoming known as the energy coast.

Methodology & Sampling

Multi-channel research methodology.

Regional Market (Online)

1,700 responses

- An online panel split into two nationally representative sample segments:
  - *Near regional 700 sample residing in a 90 minute drive radius to Suffolk Coast (very representative of the days out market demand but also strong holiday market demand)*
  - *Wider regional 1000 sample living in a 90 to 180 minute drive radius to the Suffolk Coast (representative of the wider holiday market demand, but containing some days out market demand)*
  - Fieldwork commenced 21 February 2019 and concluded 28 February 2019

In-situ visiting market (Face to Face)

69 responses

- Face to face interviews conducted in three locations - Aldeburgh, Snape Maltings & Southwold –all with a sizeable tourist and visitor footfall – over 6 day shifts (2 per location)
- Interviews took place on consecutive weekends at the end of February/beginning of March 2019
- Only those aged 16+ who were on a day out or overnight holiday to the Suffolk Coast were interviewed.

Business Survey

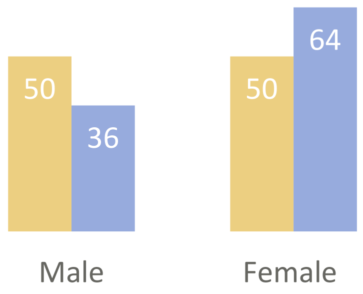
113 responses

- Participants were drawn from a business database The Suffolk Coast DMO shared with BVA BDRC.
- An invitation was sent on 21 February 2019 inviting them to participate in an online survey.
- Those who had not responded were contacted by telephone.

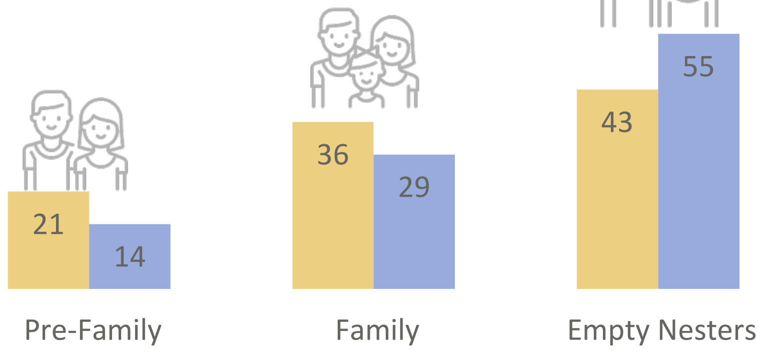
Visitor market: Profile of consumer respondents interviewed

AVis1-AVis4c/FVis1: Regional Market to the Suffolk Coast & In-Situ(F2F) (%)

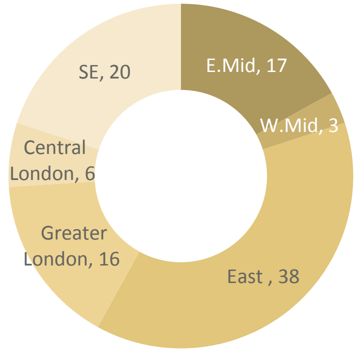
Gender



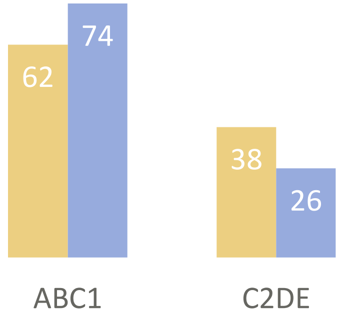
Lifestage



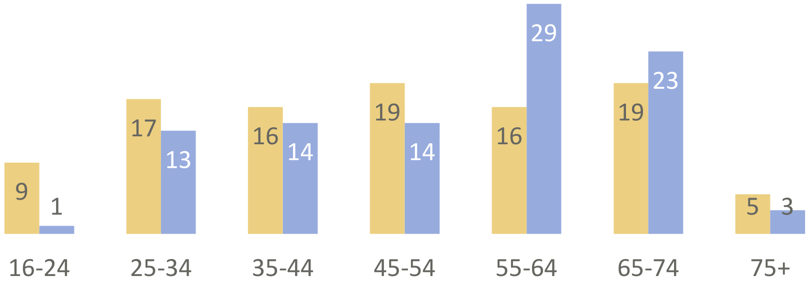
Region of Residence

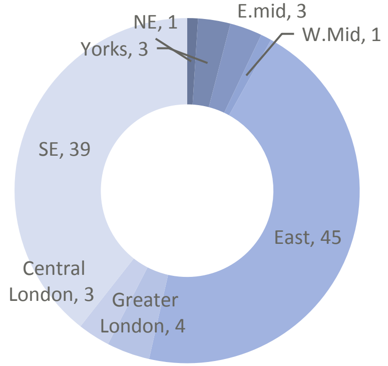


Social Grade



Age



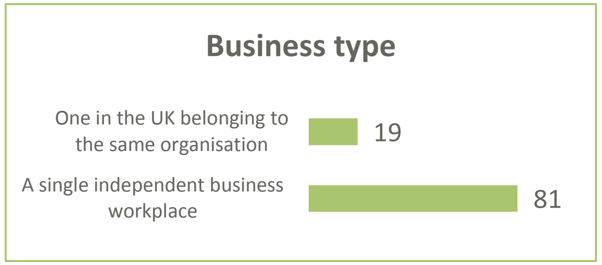


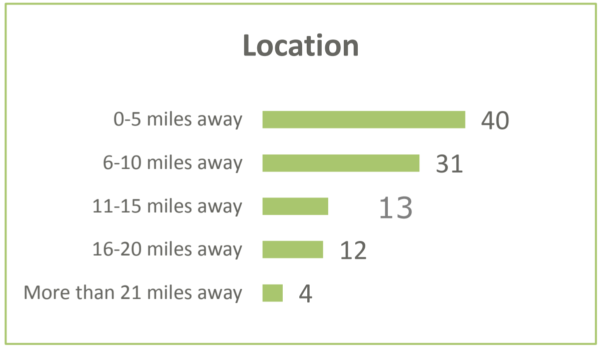
Base: All regional market (n=1,700)/In-situmarket (n=69) aged 16+

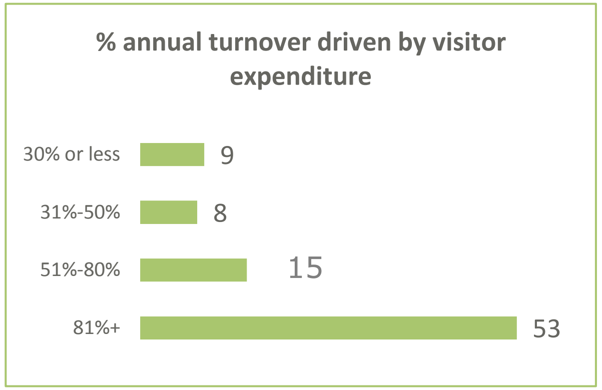
Business market: Profile of business respondents interviewed

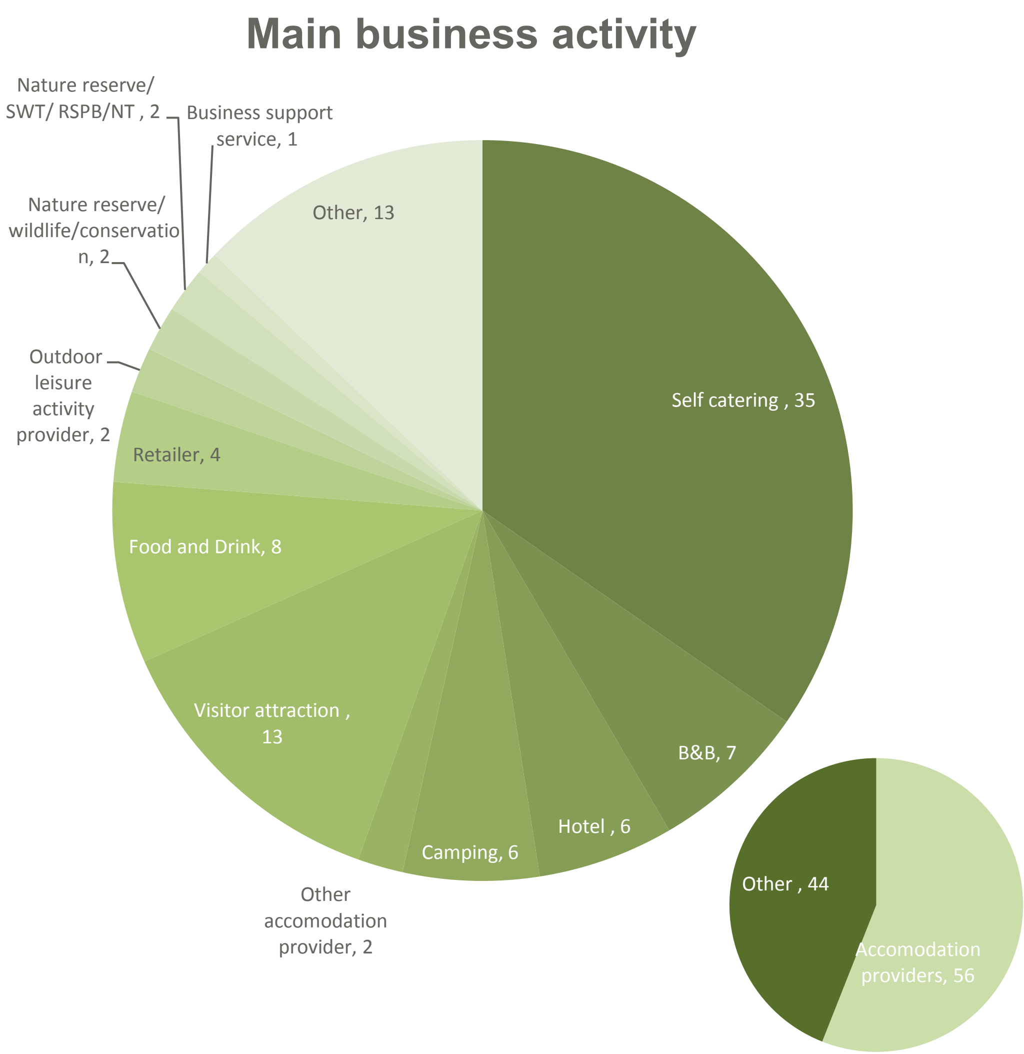
ABus2-ABus5 – Profiling questions

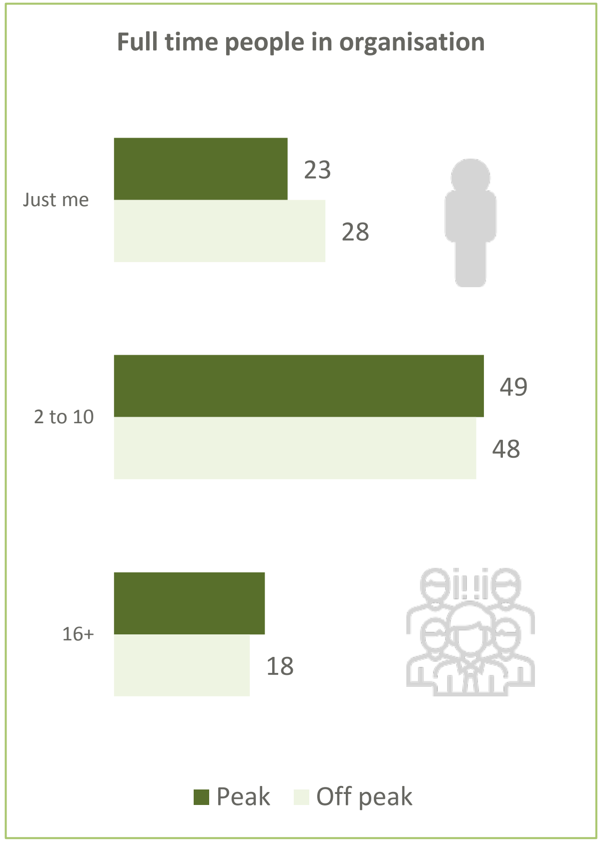
%







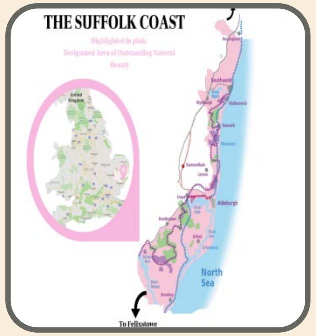


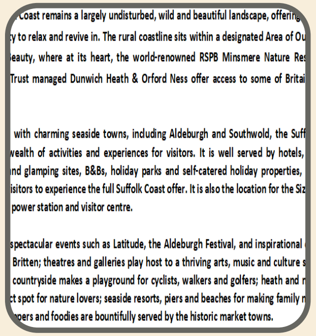


Base: All business respondents (n=113)

Stimulus

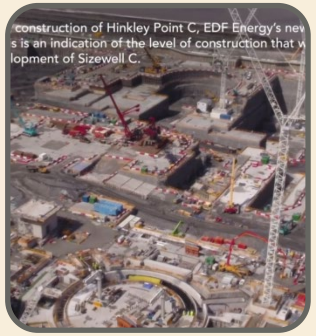
Respondents were showed seven stimuli:

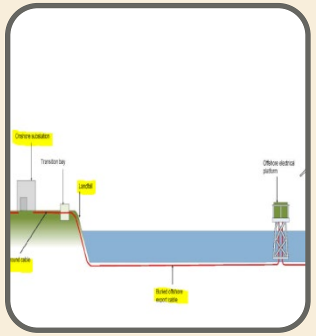


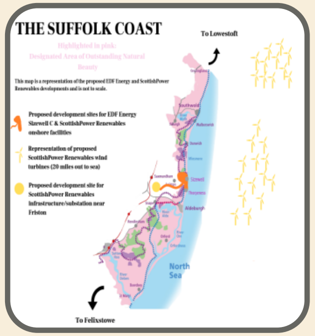

Coast remains a largely undisturbed, wild and beautiful landscape, offering
y to relax and revive in. The rural coastline sits within a designated Area of Ou
eauty, where at its heart, the world-renowned RSPB Minsmere Nature Res
Trust managed Dunwich Heath & Orford Ness offer access to some of Britai

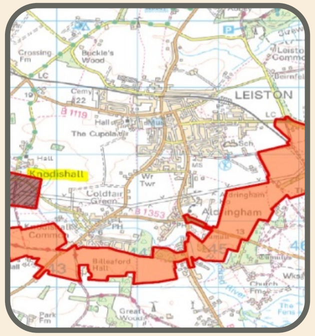
with charming seaside towns, including Aldeburgh and Southwold, the Suff
wealth of activities and experiences for visitors. It is well served by hotels,
nd glamping sites, B&Bs, holiday parks and self-catered holiday properties,
isitors to experience the full Suffolk Coast offer. It is also the location for the Siz
power station and visitor centre.

spectacular events such as Latitude, the Aldeburgh Festival, and inspirational
Britten; theatres and galleries play host to a thriving arts, music and culture s
countryside makes a playground for cyclists, walkers and golfers; heath and r
t spot for nature lovers; seaside resorts, piers and beaches for making family r
pers 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 Hinckley 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.

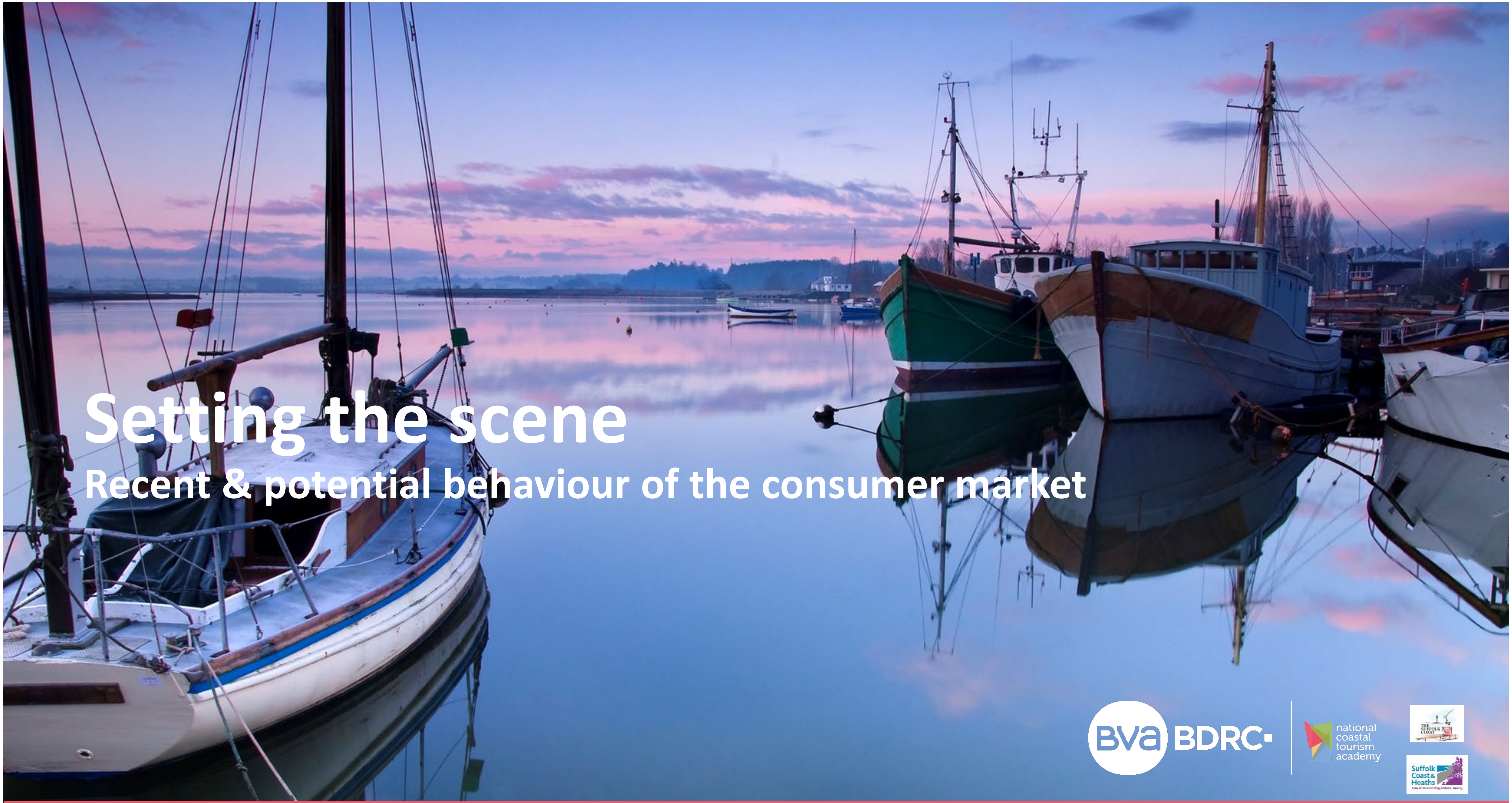
Key niche segments reported on

In order to comprehensively evaluate the impact proposed energy developments will potentially have on tourism on the Suffolk Coast this report viewed findings through the perspective of key audiences within the primary online regional market.

- The near (within 90 minute drivetime) and wider (90 – 180 minute drivetime) regional market
- Lifestages (Pre family, Family & Empty nesters)
- Those with / without previous experiences of days out on the Suffolk Coast.

The perspective of two further niche audiences was also analysed, those whose responses to developments represent an important validation to the economic predictions calculated.

Niche:	Definition:	Question:	
Pre-Familiarity (n=157)	*With eyes already open to the Suffolk Coast this audience had already been on at least one day out or holiday to the Suffolk Coast AND was already "At least somewhat aware of what there is to see and do on the Suffolk Coast" AND was also "Aware and knew at least a little about developments at both Sizewell C and SPR" prior to completing the survey.*	AVis6a BVis1 CAII2	PF
Unprompted Considerators (n=390)	*This is the audience who, when asked within a list of other coastal destinations, had already been considering visiting the Suffolk Coast in the future for ANY days out or holiday (YES only). They represent a pure, unbiased cut of the current regional market who were considering visiting prior to reading the further detail of the Suffolk Coast Proposition.*	Avis5b	UC



Setting the scene

Recent & potential behaviour of the consumer market

Summary:

For visitors the Suffolk Coast is mainly perceived as a place to relax in and escape with nature.

The motivations to visit the Suffolk Coast are centred around nature, including exploring the area's many towns and villages, the countryside and nature reserves.

This section examines:

- Who makes up the regional visitor market for the Suffolk Coast?
- Where people like to visit for days out or a holiday?
- Frequency of visits to the Suffolk Coast
- Current & future motivations for visiting the Suffolk Coast
- Enjoyment of the Suffolk Coast and Net Promoter Scores
- Behaviour and Preferences when visiting the Suffolk Coast

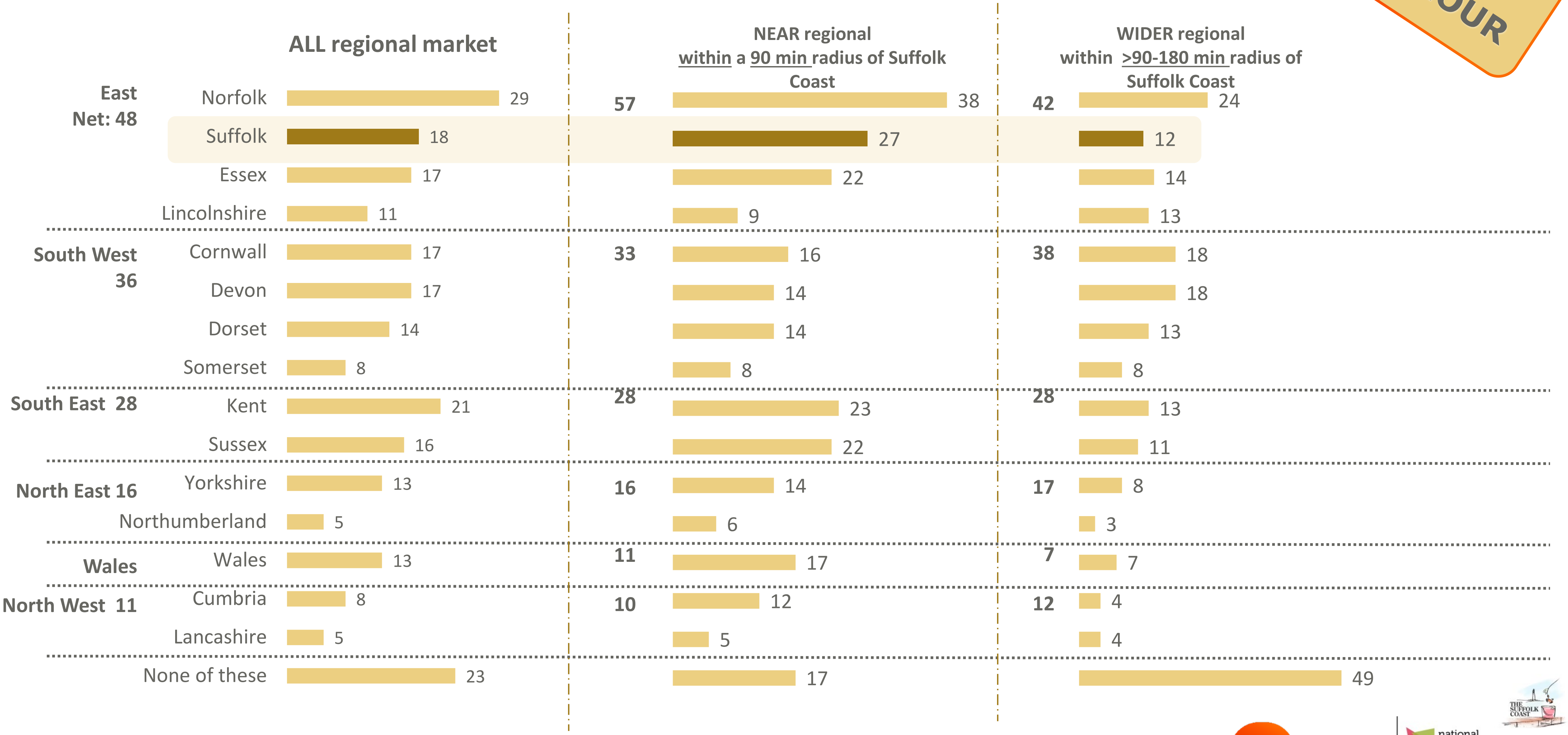
- **Although Norfolk is the more popular East Coast destination, 27% of the near regional and 12% of the wider regional market have visited Suffolk in the last 2 years for days out or holidays. The profile of those who have visited Suffolk in the last 2 years is skewed towards males, empty nesters and ABC1 audiences.**
  - **Half of the regional market have ever visited the Suffolk Coast for days out, nearly a third for a holiday. There is a high proportion of repeat visitors. Empty nesters deliver the Suffolk Coast its highest enjoyment ratings.**
  - **Nature related reasons (Net 72%) are the main motivations for visiting the Suffolk Coast historically and the main reason (Net 84%) for visiting in the future.**
  - **Exploring the area's coast/ beaches (60%), market towns (42%) and countryside (38%) - all impacted by proposed developments - are the main places people visit.**
  - **Three-quarters of Suffolk Coast visitors share their experience with others, highlighting the vast potential of negative and particularly positive news that can be spread about the area.**
- **Nearly 1 in 4 (23%) are considering visiting the Suffolk Coast in the future.**
  - **Most plan to self-drive, and visit with a partner.**
  - **Independent accommodation providers are significant beneficiaries of the tourism influx, with B&Bs (41%), self-catering cottages/apartments (36%) and independent hotels (33%) the most popular places stayed in.**

More than 1 in 4 in near regional market and 1 in 8 in wider regional market have visited Suffolk in the last 2 years. Norfolk most popular East of England destination. Strong competition to Suffolk from South East England amongst near regional market.

PAST BEHAVIOUR

AVis5a: Which of these coastal areas of the UK have you visited for a holiday/days out in the last 2 years? (%)

Families more likely to have visited the East, SW & SE than other lifestages



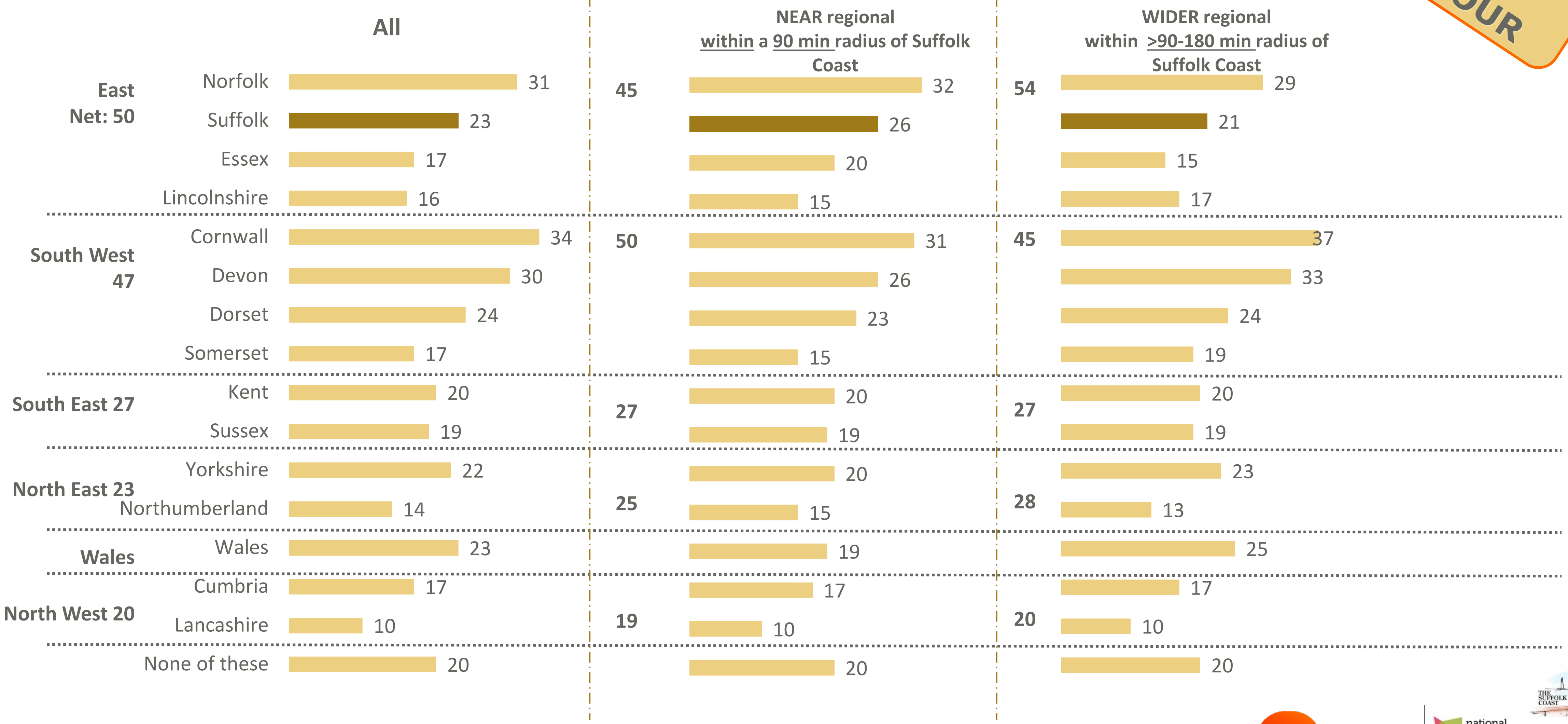
Base: All regional market aged 16+ (n=1,700/n=700 live within 90 mins of Suffolk Coast/n=1,000 live within >92-180 mins of Suffolk Coast

Those from near regional market more likely to consider the East Coast as a days out/holiday destination than those in wider regional market. Cornwall and Devon are the most considered destinations , on a par with Norfolk and Suffolk even within the near regional market

UNPROMPTED INTENDED BEHAVIOUR

AVis5b: Which of these coastal areas of the UK are you considering visiting for a holiday/days out in the future? Please select all that apply. (%)

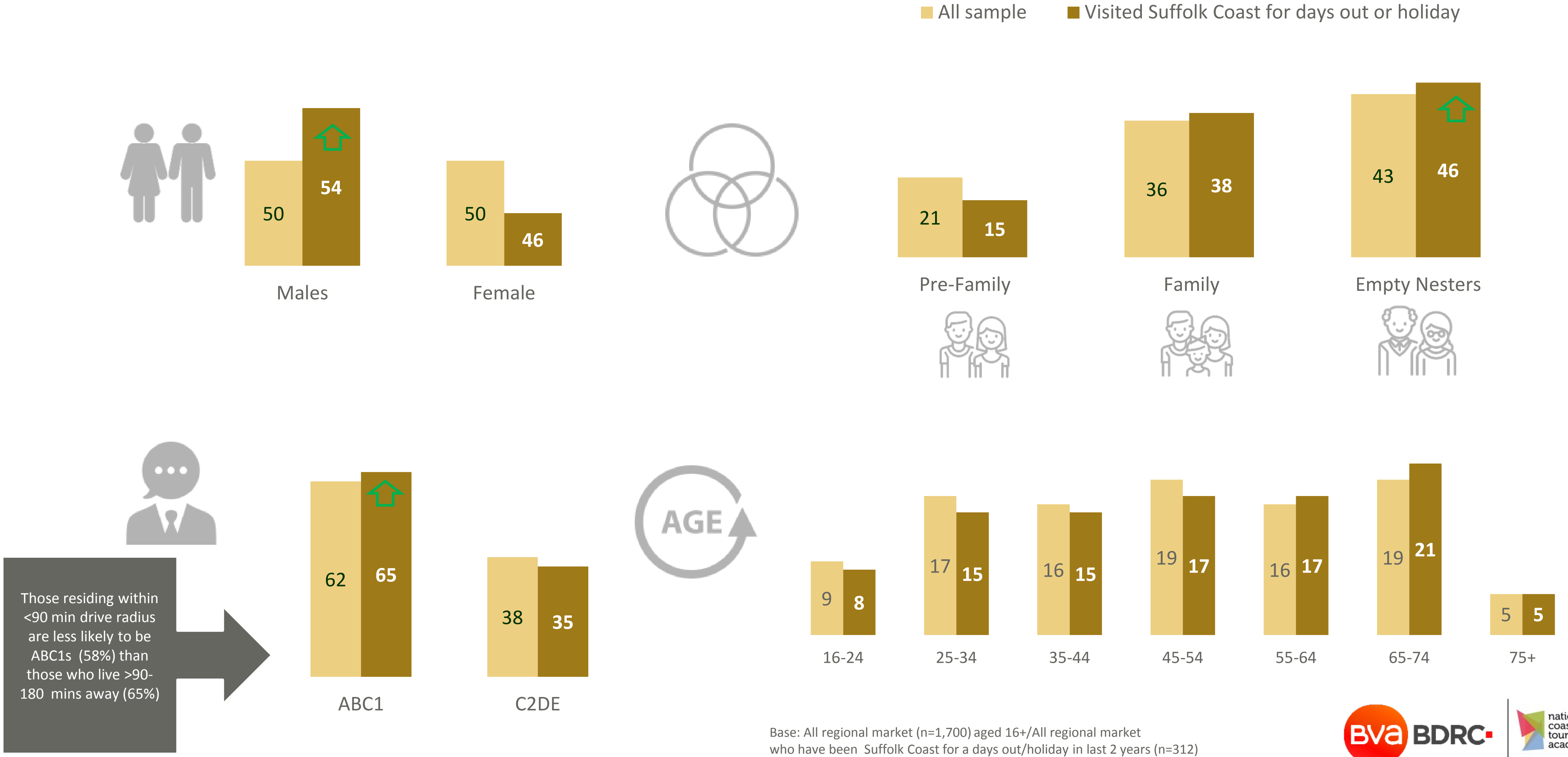
Families more likely to be considering the East and SW than other lifestages



Base: All regional market aged 16+ (n=1,700/n=700 live within 90 mins of Suffolk Coast/n=1,000 live within >92-180 mins of Suffolk Coast

Compared to the overall regional market profile, the profile of those who have visited Suffolk in the last 2 years is skewed more towards males, empty nesters, ABC1s and 55-74 yr. olds

AVis1-AVis4c/FVis1/AVis6: Regional Market to Suffolk and the Suffolk Coast (%)



Base: All regional market (n=1,700) aged 16+/All regional market who have been Suffolk Coast for a days out/holiday in last 2 years (n=312)

Amongst those that do visit the Suffolk Coast for days out and holidays there is a high proportion of regular and highly frequent repeat visitors.

Avis6b/6c: How often do you experience days out/visit the Suffolk Coast for days out/holiday (%)? (In-Situ)

DAYS OUT

- **75% regularly visit the Suffolk Coast for days out** *(At least once every couple of years)*
- **16% are highly frequent visitors** *(At least once every couple of months)*
- **This rose to 91% and 32% respectively amongst in situ visitors**
- ***Only 6% had ever been on one day out on the Suffolk Coast and not returned***

HOLIDAY

- **57% regularly visit the Suffolk Coast for a holiday** *(At least once every couple of years)*
- **20% are highly frequent visitors** *(At least twice a year)*
- **This rose to 63% and 30% respectively amongst in situ visitors**
- ***Only 11% had ever been on one holiday on the Suffolk Coast and not returned***

Empty nesters generally visit less frequently than other lifestage segments.

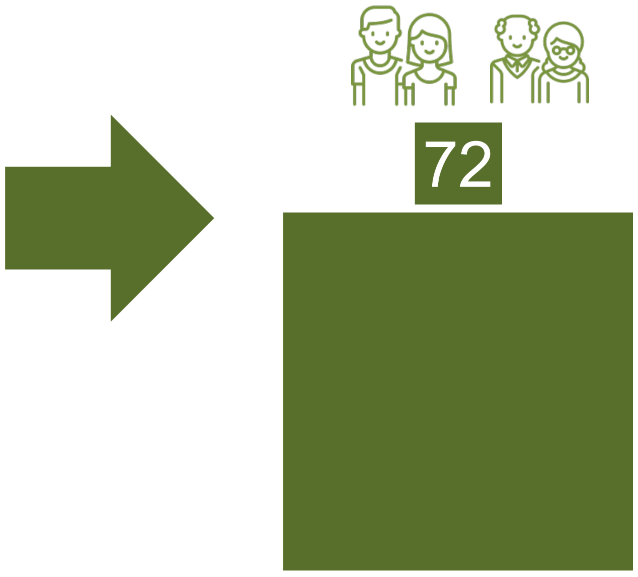
Base: All regional market aged 16+ who have ever been on a days out to the Suffolk Coast (n=843)/All regional market aged 16+ who have ever been on holiday to the Suffolk Coast (n=487)/All in-situ market aged 16+ been on days out to the Suffolk Coast (n=53)/)/All in-situ market aged 16+ been on holiday to the Suffolk Coast (n=43)

PAST VISIT MOTIVATIONS

The Suffolk Coast is perceived mainly as a place to relax and escape in a natural setting. Pre-families & empty nesters are more motivated to visit by its natural attractions than families.

AAII7a: What were your main motivations for your last day out or holiday/recent trip to the Suffolk Coast?

Main motivations to visit the Suffolk Coast on last days out/holiday (%)



Net Nature related motivations

In-Situ	96
Business	98

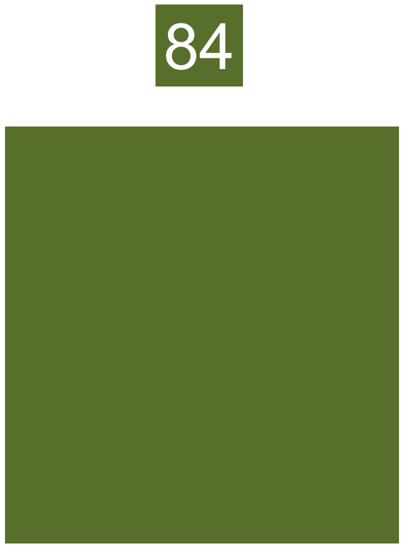
Base: All regional market aged 16+ who have ever visited Suffolk Coast for days out/holiday(n=1,013)
All in-situ market aged 16+ (n=69)/All business respondents (n=113)

Inherently the Suffolk Coast is a place to commune with nature as these are the overwhelming motivations for future visits as well.

FUTURE VISIT MOTIVATIONS

Bvis3: What would you say would be your main motivations for a days out/a holiday to the Suffolk Coast in the future? *Choose up to 3.*

Main motivations to visit the Suffolk Coast in future(%)



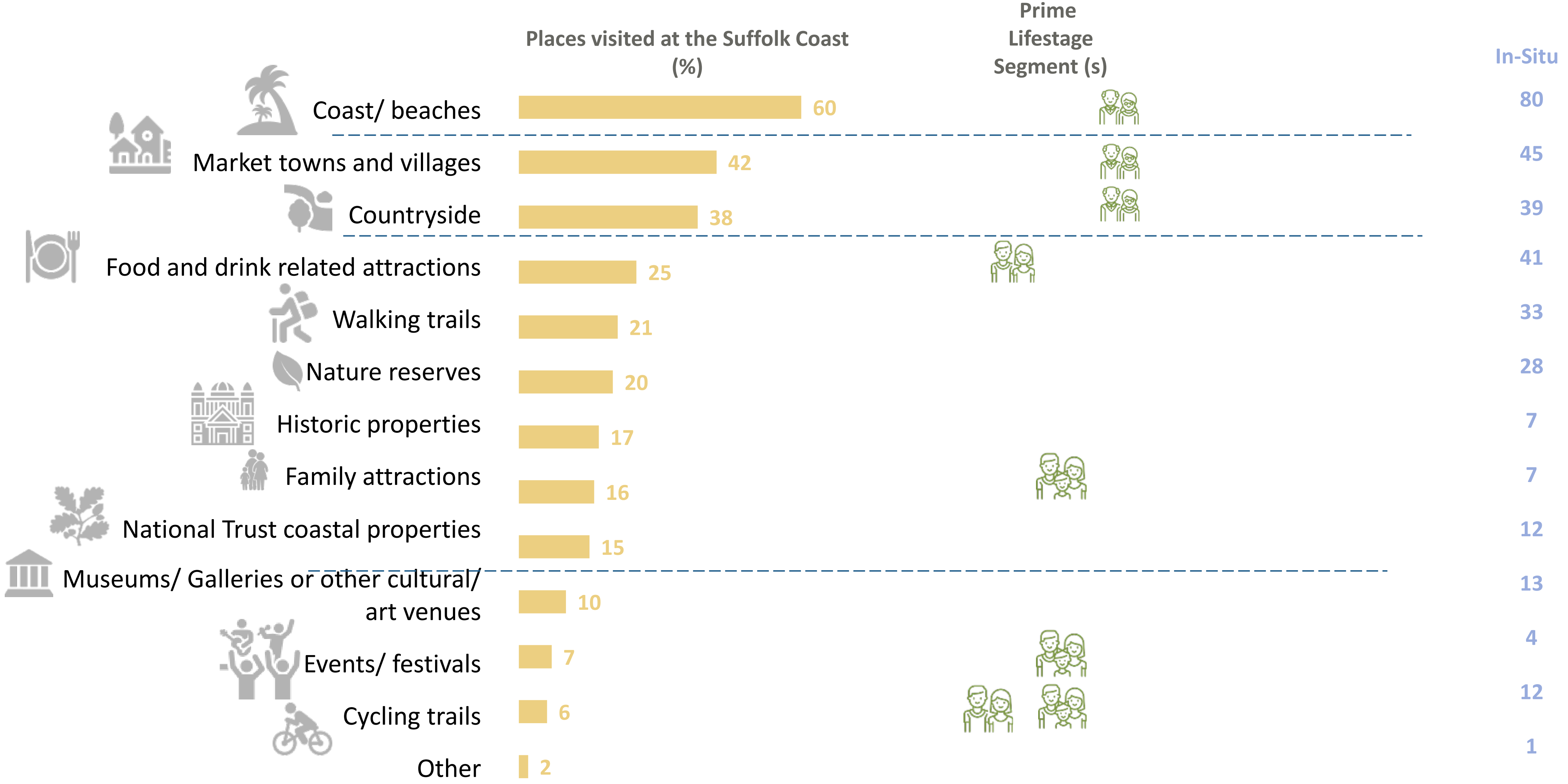
Net: Nature related motivations

Proportions citing Net Nature as their main motivator rises significantly (+12%pts) after respondents read the descriptive text about the Suffolk Coast. Highlights importance of marketing communications and the uplift this activity gives to visit consideration.

Base: All regional market aged 16+ who are considering the Suffolk Coast for days out/holiday(n=1,540)

Coast/beaches are the prime attraction, followed by the region's market towns & villages. The countryside is also important, re-asserting the region's status as a destination for tranquil seaside escapes from regional urban areas. Food and drink related attractions appeal mainly to pre-family groups.

AVis7b: What kind of places did you visit/experience on your most recent day out or holiday to the Suffolk Coast?

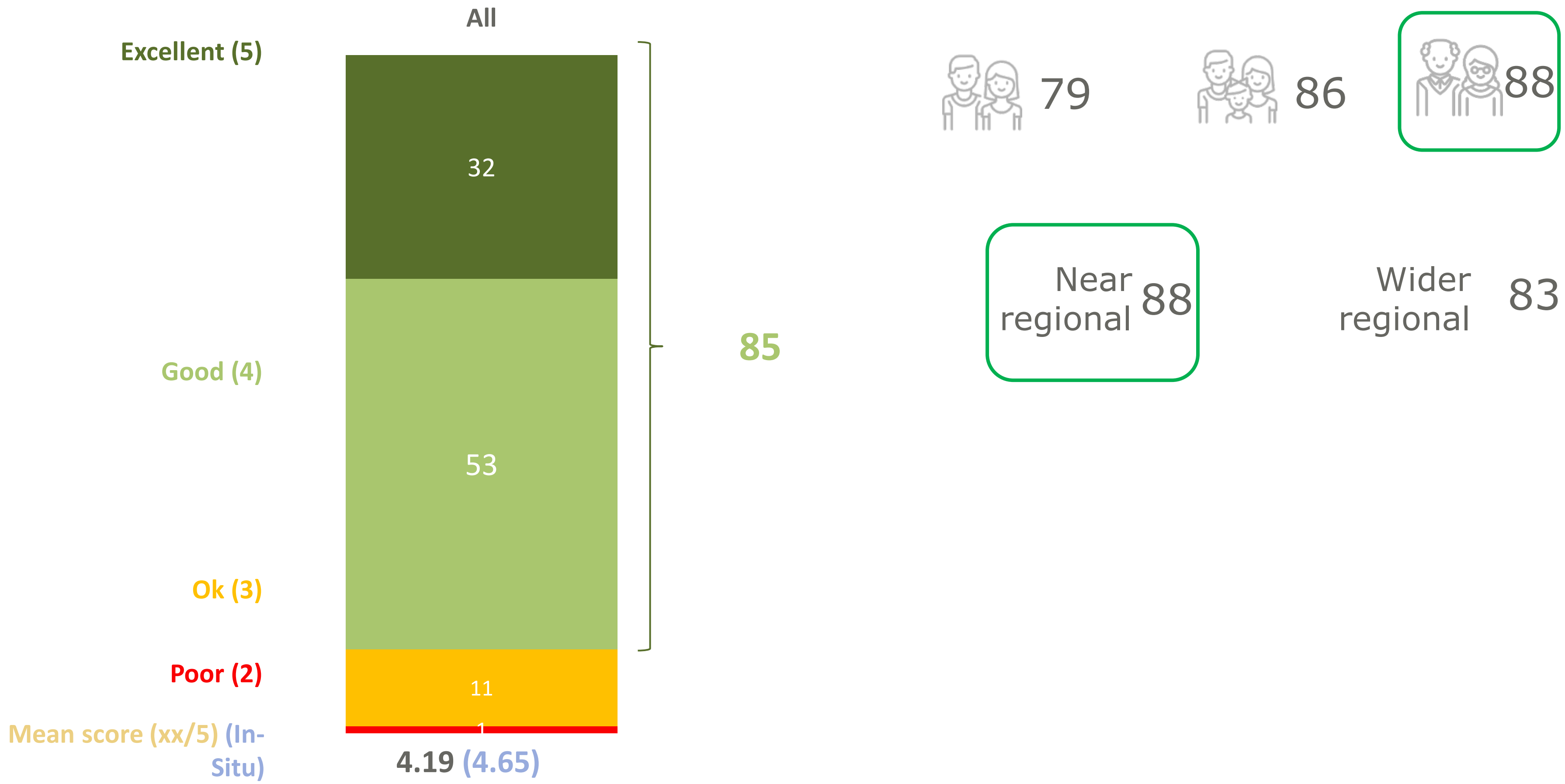


Base: All regional market aged 16+ who have visited Suffolk Coast for days out/holiday(n=1,013)
All in-situ market aged 16+ (n=69)

The Suffolk Coast rates highly in terms of enjoyment, with almost a third of respondents rating their experience as ‘excellent’. Enjoyment levels highest amongst empty nesters and the near regional market.

AVis8a. How much did you enjoy your most recent day out or holiday to the Suffolk Coast?

Enjoyment Ratings (%)



Base: All regional market aged 16+ who have visited Suffolk Coast for days out/holiday(n=1,013)
All in-situ market aged 16+ (n=69)

Strong positive Net Promoter Score with In-Situ visitors to the Suffolk Coast (F2F) delivering a particularly high score. Word of mouth and personal recommendations important in boosting tourism to the Suffolk Coast.

AVis8c: On a scale of 1 to 10 how likely are you to recommend the Suffolk Coast to a friend, colleague or family member?

NPS Calculation
%promoters (rating 9/10 out of 10) minus % detractors (rating 0-6 out of 10)

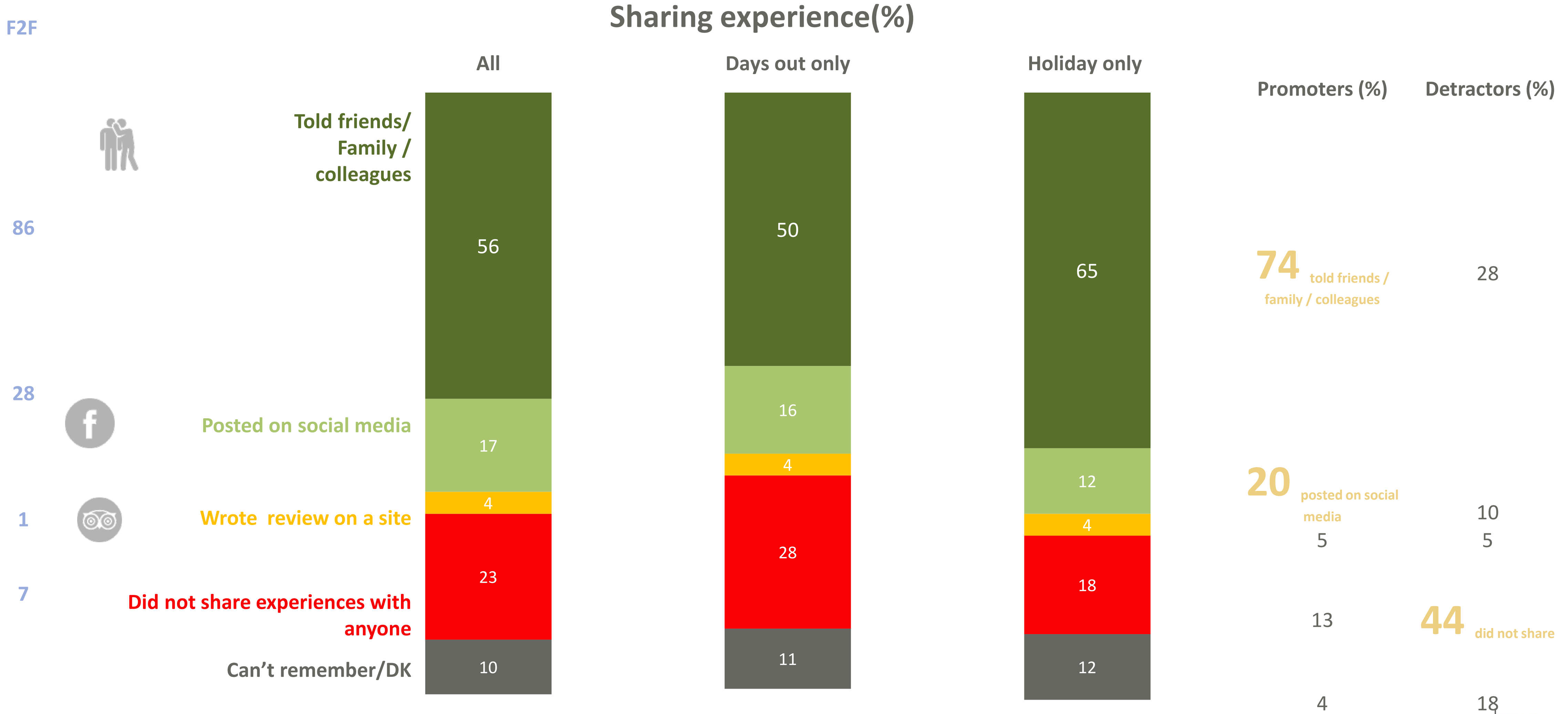
Net Promoter Score (Regional Online) (In-Situ) – by Demographic (NPS %)

All		Lifestage		Region
+27 +65	M: 23 F: 32	+15 + 32 +27	ABC1: +27 C2DE: +27	Near +34 Wider +31

Base: All regional market aged 16+ who have visited Suffolk Coast for days out/holiday(n=1,013)
All in-situ market aged 16+ (n=69)

Word of mouth recommendation is the main channel used by visitors to share their experience about the Suffolk Coast. Holiday makers more inclined to spread the word than those just on a day out. Noticeable that promoters rather than detractors are more likely to tell other people about their experience.

AVis8b. Did you tell anyone about your experience on the Suffolk Coast after your most recent day out or holiday?

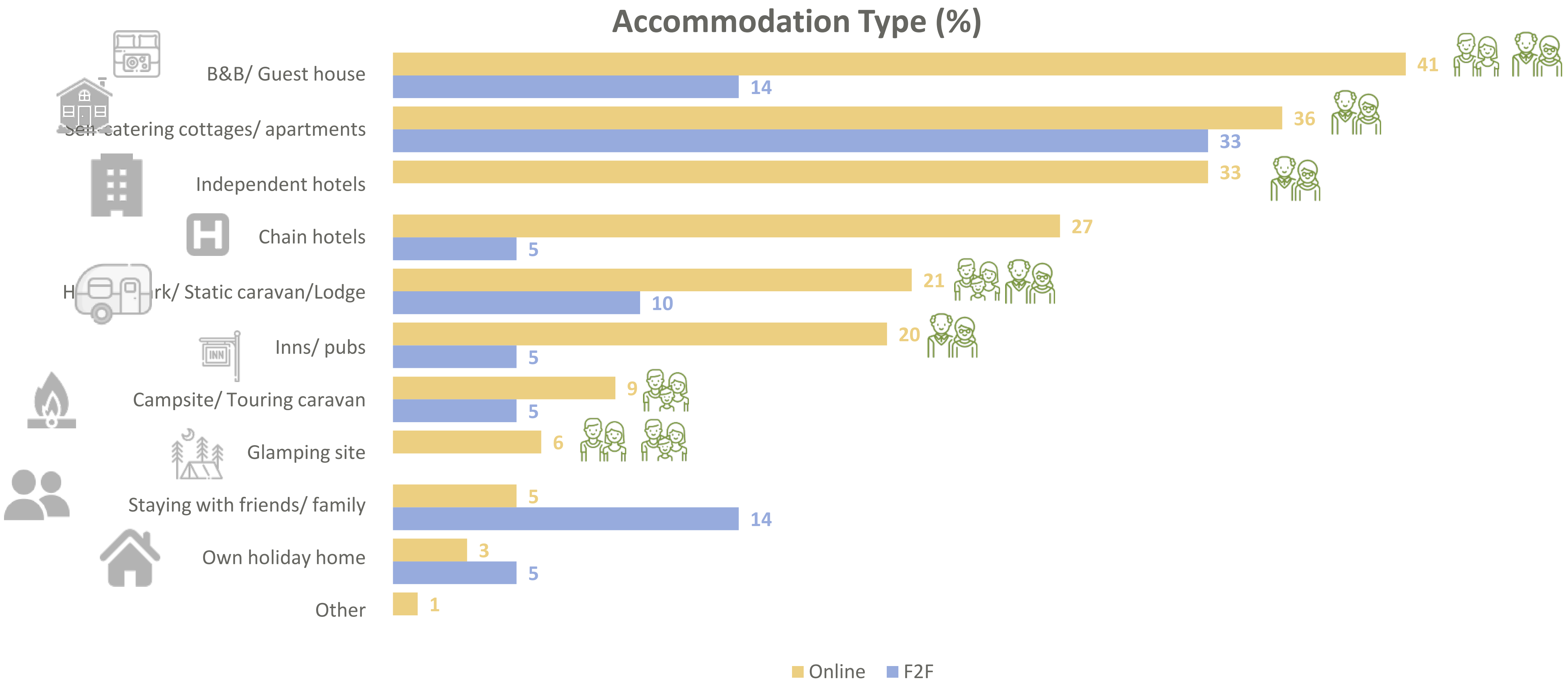


Base: All regional market aged 16+ who have visited Suffolk Coast for days out/holiday(n=1,013)
All in-situ market aged 16+ (n=69)

Guest houses and B&Bs are the overwhelming accommodation choice for the potential regional market, followed by self-catering cottages / apartments.

BVis6: And in what accommodation would you look to stay in while on the Suffolk Coast for a holiday? Please select up to 3 you would most likely consider?

A11F2F: And in what accommodation have you been to staying in whilst on the Suffolk Coast? (Indicative only)

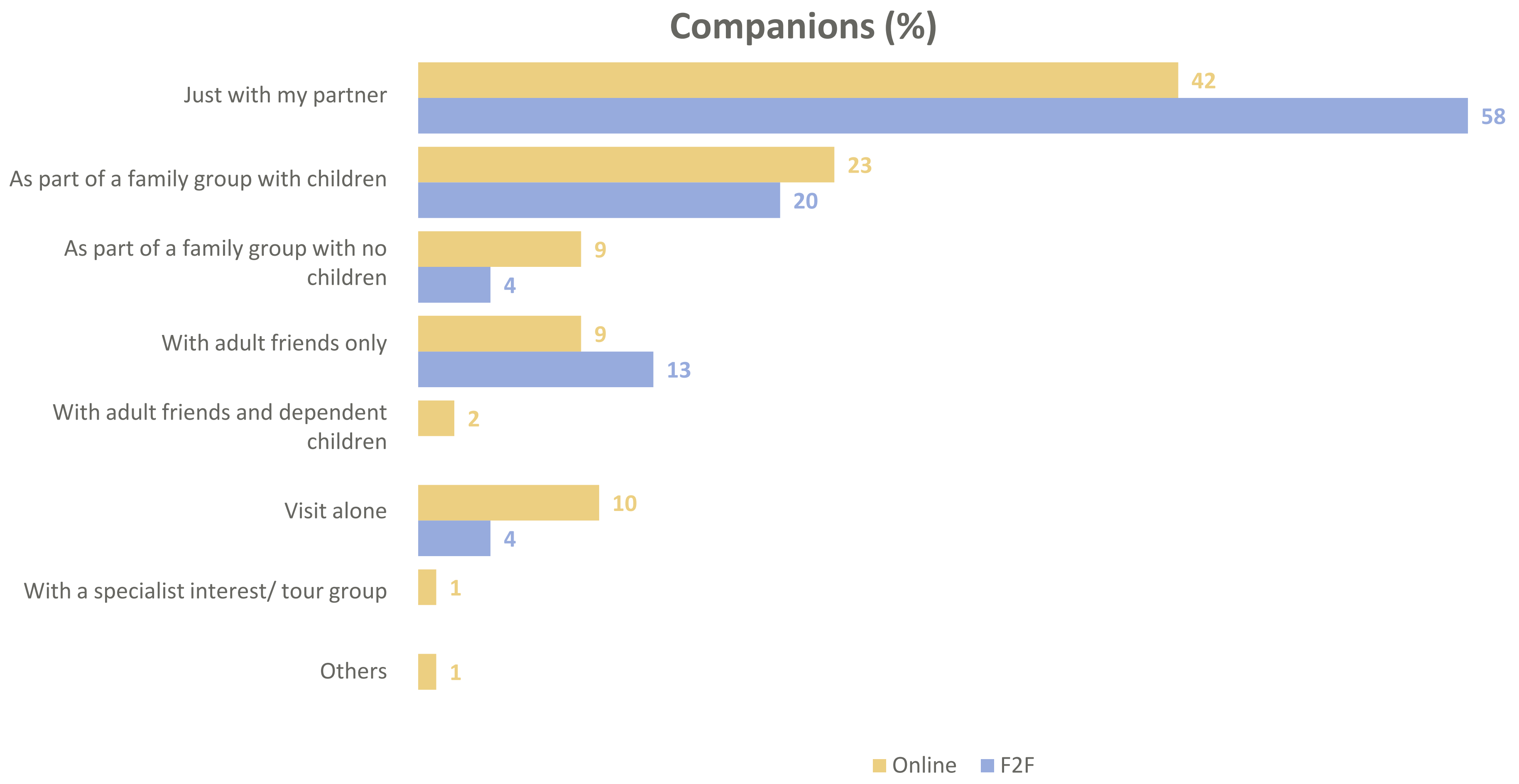


Base: All regional market aged 16+ who are considering the Suffolk Coast for a holiday (n=1,215)/
All in-situ market aged 16+ staying in accommodation (n=21) CAUTION Insignificant base size

‘Just with my partner’ is the most common group type when visiting the Suffolk Coast.

BVis4: With whom are you most likely visit the Suffolk Coast with on a next visit?

A9F2F: With whom have you visited the Suffolk Coast?

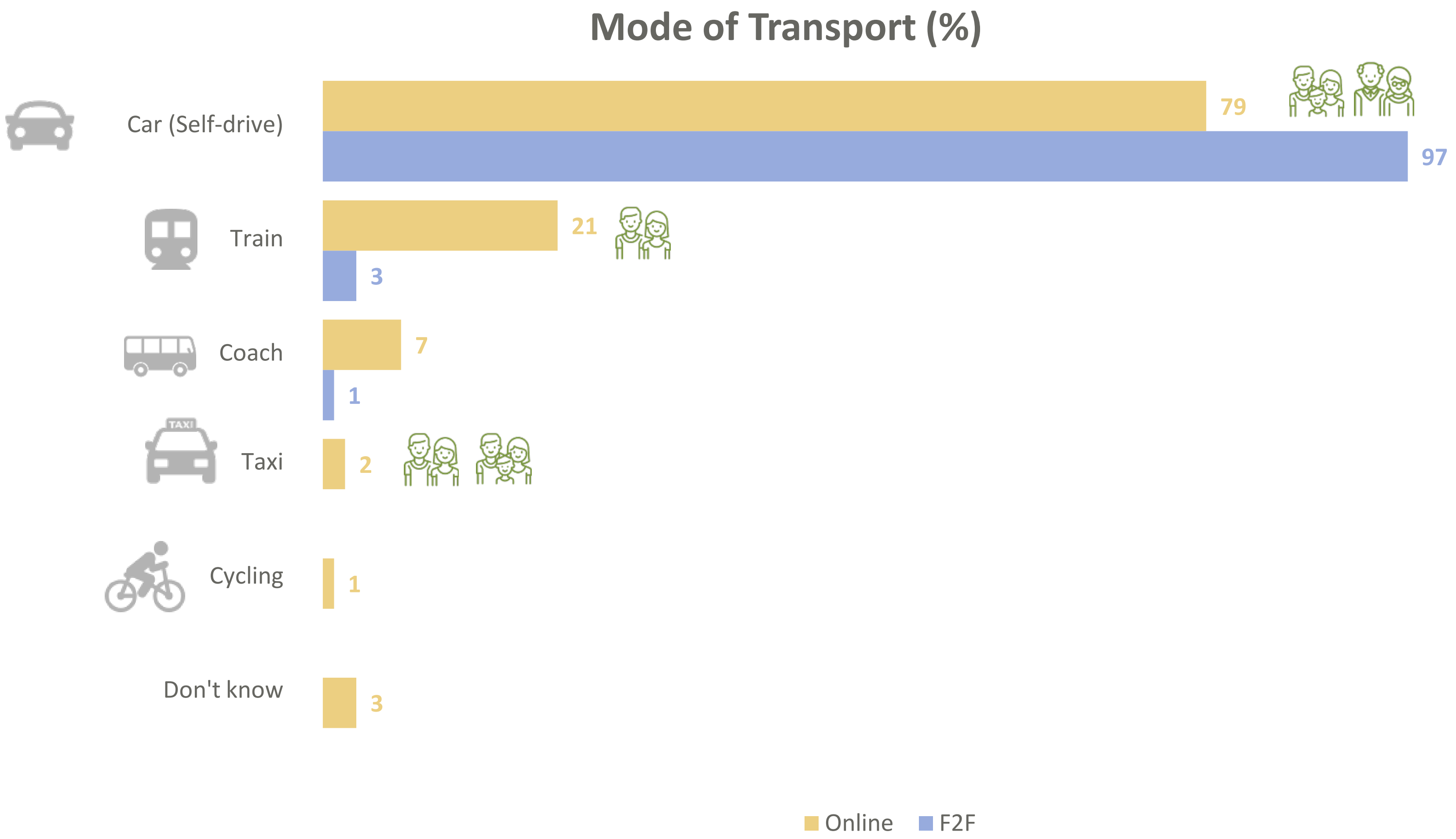


Base: All regional market aged 16+ who are considering the Suffolk Coast for a days out/holiday (n=1,540)/All in-situ market aged 16+ (n=69)

Given that the area's tourist attractions are spread out across the coast, it makes sense for most visitors to the area to use their own cars and they do. Noticeably one in five potential visitors would access the area by train, driven by the pre-family market.

BVis5: What transport are you most likely to use to get to the Suffolk Coast?

A10F2F: What transport have you used to get to the Suffolk Coast?



Base: All regional market aged 16+ who are considering the Suffolk Coast for a days out/holiday (n=1,540)/All in-situ market aged 16+ (n=69)

Awareness and reaction to proposed infrastructure developments

Summary:

Some awareness of energy projects with both developments deterring regional market from visiting. Sizewell C developments perceived to be more of a deterrence, causing more disruption. However for most respondents the proposed developments will make no difference to their likelihood to visit the Suffolk Coast.

Awareness of Sizewell C is higher than that of SPR, due likely to the extensive media coverage given to the former.

Concern is that the greater the media coverage the developments receive the more detrimental the impact it will have on people's likelihood to visit without a full understanding of the broad offer of the Suffolk Coast

Businesses very pessimistic about the impact of the energy developments on visitors' likelihood to visit.

However a minority of visitors from the regional market are actually more likely to visit the Suffolk Coast for days out and holidays during construction.

These tend to be already frequent visitors clearly determined not to be put off by the construction and/or those likely to have a niche interest in the construction of energy projects themselves.

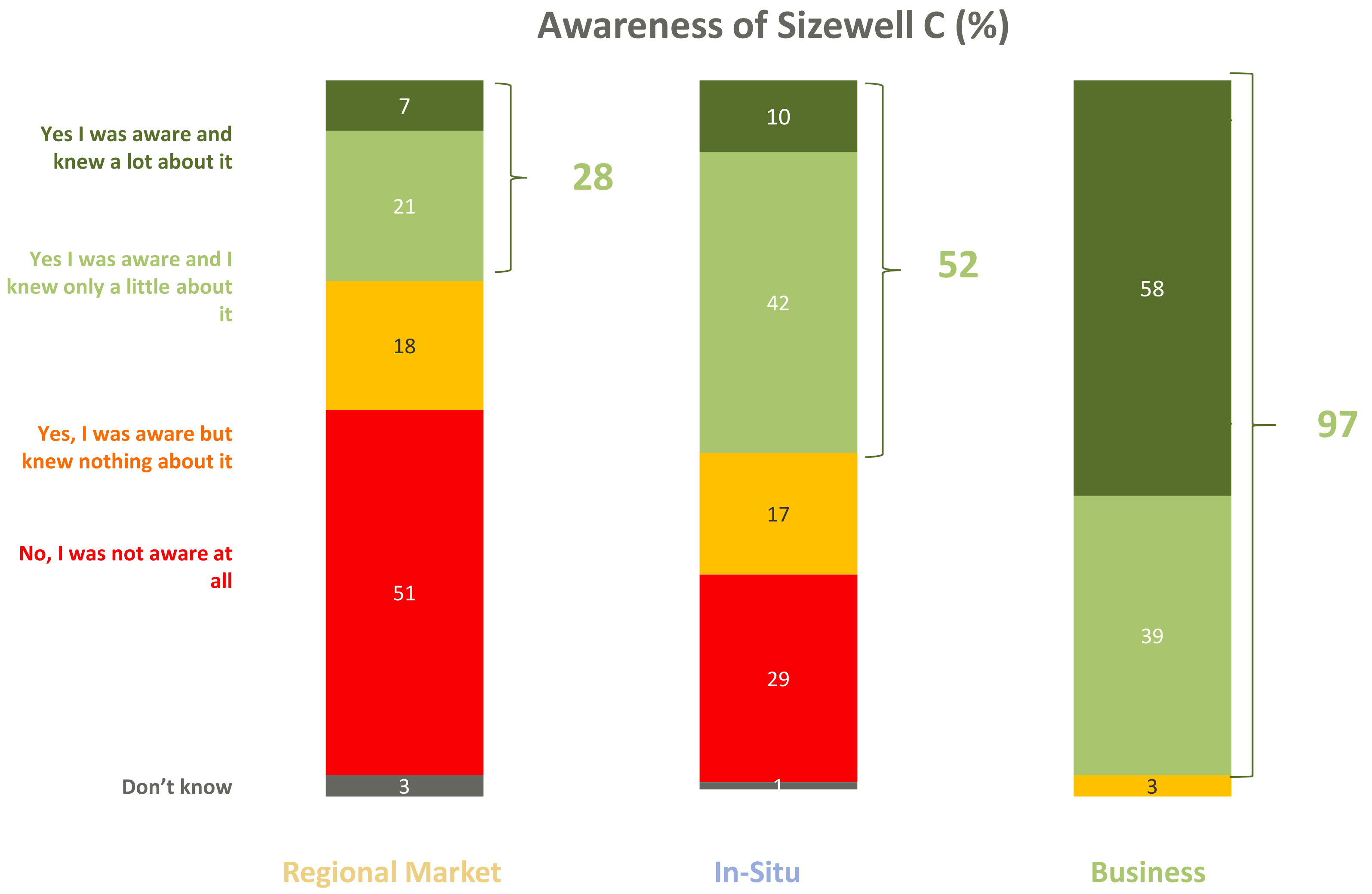
This section examines:

- Awareness of the energy developments
- Perceptions of the impact of energy developments
- Change in likelihood to visit Suffolk Coast during construction
- Who is less / more likely to visit during construction period

- **Half of regional market (51%) unaware of EDF plans for Sizewell C whilst two-thirds (65%) unaware about SPR's plans for offshore wind turbines and its onshore infrastructure. A small minority (7% for EDF / 5% for SPR) know a lot about the plans.**
    - **In contrast most businesses know something about the planned developments.**
- **Nearly two-thirds (64%) of regional market believe the proposed developments will act as a deterrent from visiting the coast. Currently all audiences more inclined to believe Sizewell C construction will be more of a deterrence.**
    - **1 in 5 believe neither development will deter them from visiting whilst only 4 % of businesses believe neither will cause disruption.**
- **Despite the deterrence, most people (58%) are no more/no less likely to actually visit the Suffolk Coast as a result of EDF and SPR planned development.**
    - **However a greater proportion of the regional market are less likely to visit (net: 29%) than are more likely to visit (net: 12%). This indicates that the overall impact on tourism will be negative**
    - **All other things being equal it suggests an 8% fall in visitor numbers during construction**
    - **However the audiences least likely to visit are those in the wider regional market, practically less likely to visit in the first place. Near regional markets are less negatively impacted.**

Half of the regional market completely unaware of the Sizewell C proposal. Most businesses were aware of Sizewell C.

CAII1i: Were you aware of the development plans for Sizewell C before you saw the video?



<u>Regional market variations</u>

Unsurprisingly, those **who lived within a 90 minute radius were more aware**

<u>Net: Aware at least a little</u>

Near regional: 36%
Wider regional: 22%

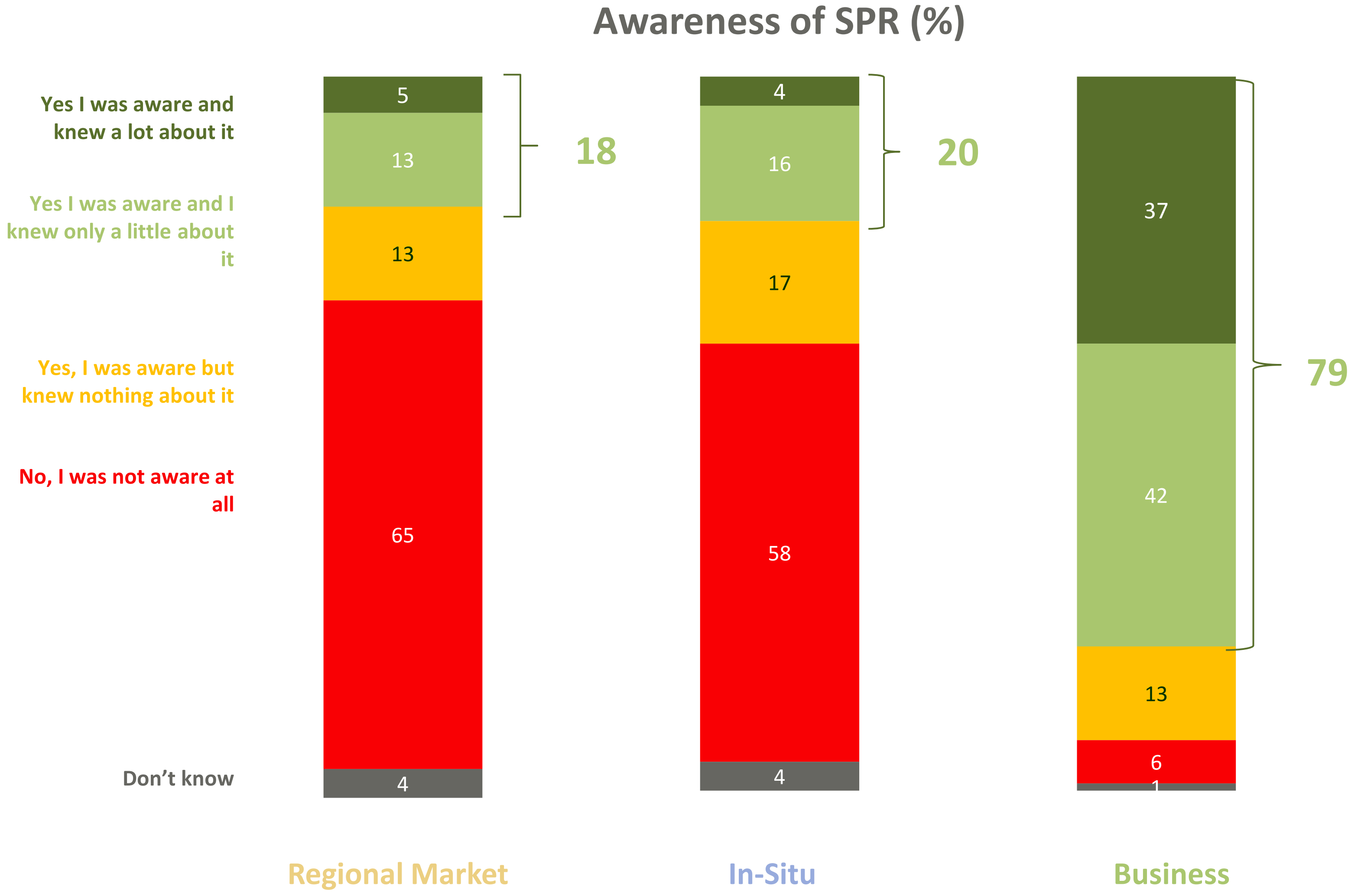
PF: 100%

UC: 35%

Base: All regional market aged 16+ (n=1,700)/All in-situ market aged 16+ (n=69)/All business respondents (n=113)

Overwhelming majority of regional market know nothing about SPR's plans for offshore wind turbines and onshore infrastructure. Majority of businesses know at least a little

CAII1ii: Were you aware of the development plans for SPR wind turbines with construction of onshore infrastructure, before you saw the video?



Regional market variations

Unsurprisingly, those **who lived within a 90 minute radius were more aware**

Net: Aware at least a little

Near regional: 25%
Wider regional: 14%

PF: 100%

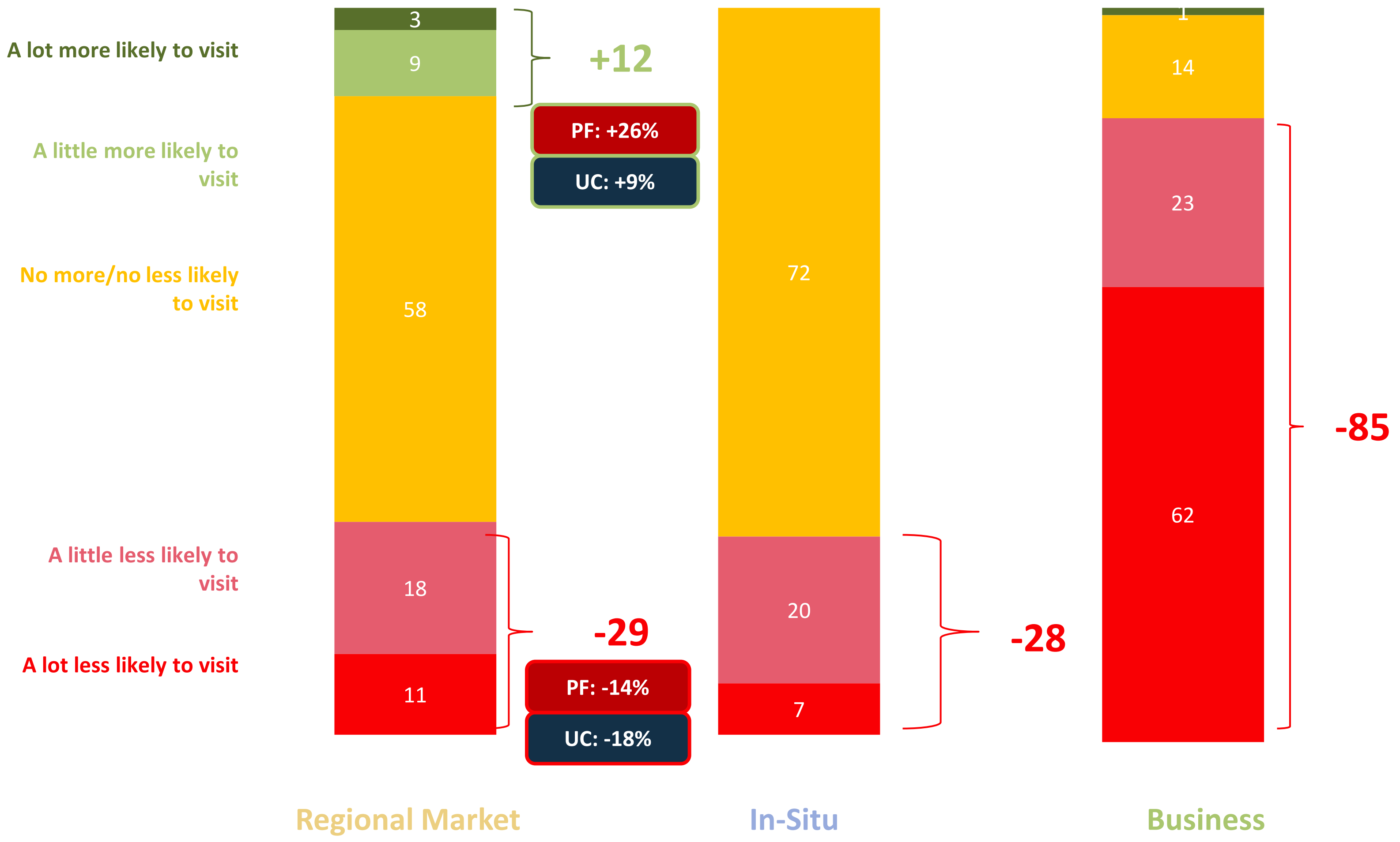
UC: 23%

Base: All regional market aged 16+ (n=1,700)/All in-situ market aged 16+ 9n=69)/All business respondents (n=113)

For most people the proposed developments make no difference to their likelihood to visit. A small minority are even more likely to visit –they may have been planning to visit more anyway and developments haven't changed that view or they may have a specialist interest in the energy developments themselves. However larger proportions are likely to visit less than visit more and that net: negative effect is a concern for the visitor economy.

CAII2: 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/visitors are more or less likely to visit the Suffolk Coast for days out or a holiday?

Likelihood to visit Suffolk Coast During Construction (%)



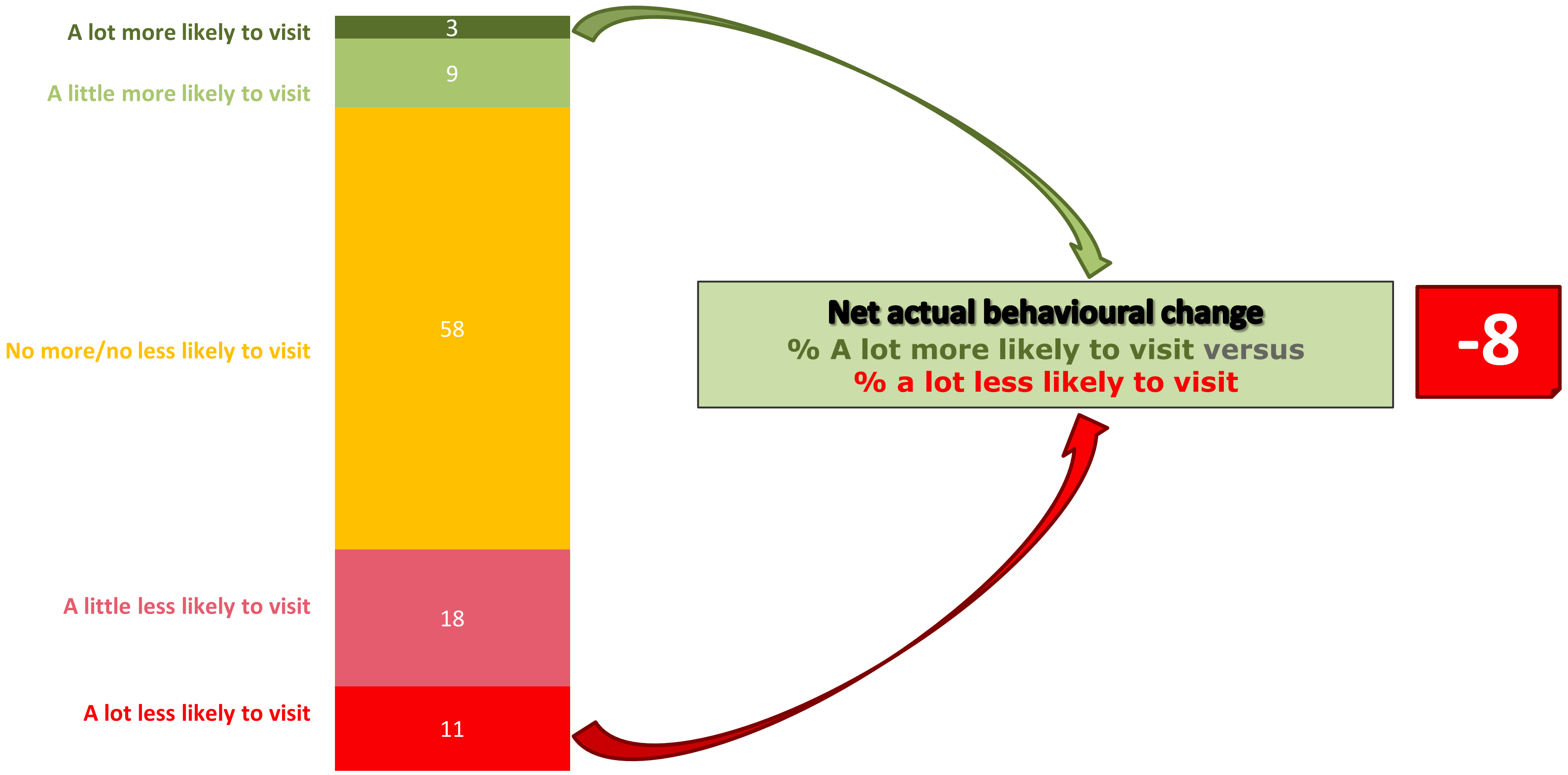
Businesses are very negative about the proposed developments. Overwhelming majority stating that they think it would make visitors a lot or a little less likely to visit

Base: All regional market aged 16+ (n=1,700)/All in-situ market aged 16+ 9n=69)/All business respondents (n=113)

Assuming all respondents are equal and only those at the ends of the scale actually change their behaviour the Suffolk Coast could be at risk of suffering an 8% fall in its visitor numbers whilst the infrastructure is being built.

CAII2: 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?

Net Behavioural Change (%)



Base: All regional market aged 16+ (n=1,700)

Changing consideration to visit the Suffolk Coast

during and after construction including potential economic impact

BVA BDRC

national coastal tourism academy

Summary:

Visit consideration is impacted significantly by regional audiences gaining a fuller understanding of both the visit proposition on the Suffolk Coast (a very strong uplift) and/or the scale of the energy developments (a very strong suppressant).

This highlights how significant investment into Suffolk Coast profile raising could mitigate the expected downturn in the economy that comes from just knowing about the proposed energy developments.

Creating a much larger pool of potential visitors with a deeper awareness and understanding of the Suffolk Coastal proposition has to be a priority. This can only be achieved by a major marketing campaign showcasing the best of what the Coast has to offer with/without on-going energy construction works. Marketing in real life will never deliver the 100% penetration achieved through a controlled research environment. However, there will be a natural news media platform, whilst EDF and SPR plans are discussed, to bring consideration of the Suffolk Coast to a wider cross-section of the regional market.

The challenge is to turn that media spotlight into a genuine positive for regional tourism.

- **Less than half claim at least some awareness of what there is to see and do on Suffolk Coast.**
- **Prompted proposition spikes consideration for visiting the Suffolk Coast for Days Out and Holidays considerably for all audiences including those who claimed to already be aware of what the region had to offer.**
    - **Highlighting competitiveness of the tourism market 'other places I would rather visit' is the most popular reason why respondents would not consider the Suffolk Coast.**
- **During construction consideration to visit falls for both days out and more significantly holidays. Holiday visitation recovers more after construction.**
    - **Frequency of visits of those still considering not expected to change much overall during or after construction of the developments.**
    - **As expected, the visit friends and family (VFR) sector is more resilient though they are not completely immune to the anticipated upheaval during and post-construction especially when it comes to days out.**
- **After construction consideration of visits to the Suffolk Coast increases again .**

This section examines:
- Consideration timeline for days out and holidays to the Suffolk Coast – how they change pre, during and post-construction of the energy developments for different audience segments.
- Estimated frequency of visits during and post construction

Introducing the below proposition to respondents spikes consideration for visiting the Suffolk Coast for days out and holidays considerably, for all audiences. This includes for those with pre-familiarity of the offer and of the energy developments. Findings highlight how significant £investment into Suffolk Coast profile raising could mitigate some of the negative impact on tourism revenues caused by the energy developments.

Bvis2 % who said yes they are considering visiting the Suffolk Coast in the future for..

PROPOSITION TEXT SHOWN TO RESPONDENTS FOR PROMPTED QUESTION:

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.

	Prompted consideration with full proposition shown	% uplift from unprompted consideration for any days out / holiday AVis5
DAYS OUT		
ALL	66	+43
Pre – familiarity	87	+53
Unprompted considerators	80	-20
HOLIDAY		
ALL	49	+26
Pre – familiarity	61	+25
Unprompted considerators	66	-34

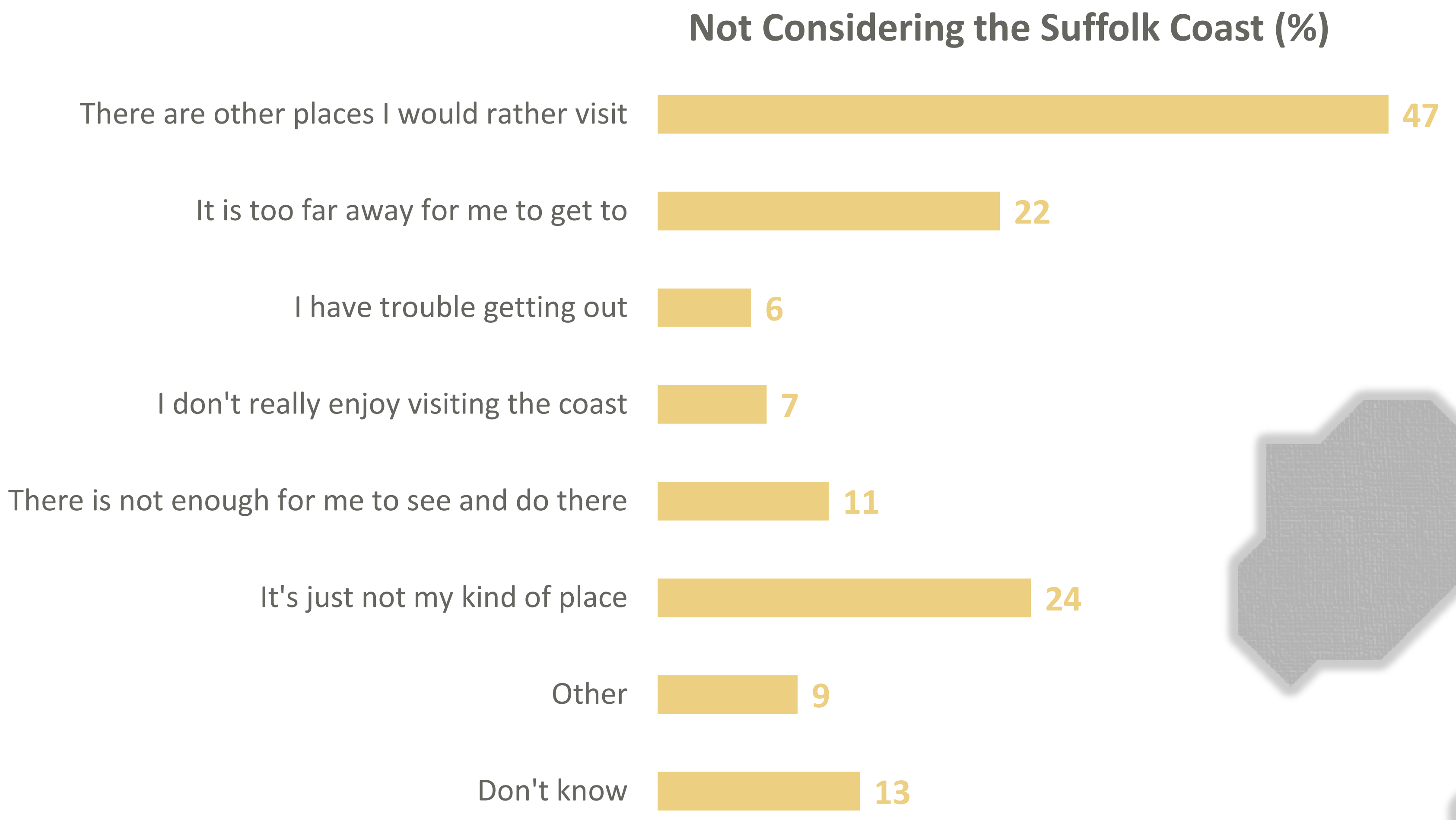
The only audience where prompted consideration goes down is amongst unprompted considerators whose starting point was 100%.

This is due to unprompted consideration being a net of days out and holidays and the possibility a minority of those unprompted considerators had in mind a different type of days out or holiday e.g. to areas outside of the AONB.

Base: All regional market aged 16+ (n=1,700)

'There are other places I would rather visit' was the most popular reason why respondents would not consider the Suffolk Coast after viewing the proposition. Highlights competitiveness of the tourism market.

BVis7: No, not considering the Suffolk Coast (after reading about what it offers) - Why do you say that? Please select all that apply.



Base: All regional market aged 16+ not considering the Suffolk Coast for days out/holiday (n=160)

Findings suggest energy developments will have a negative impact on consideration of days out. Pre-families are most negatively impacted. Overall, consideration does improve after construction from during construction phase. However it always remains lower than the initial levels of prompted consideration registered*

Consideration By Lifestage – Regional Market

% who said yes they are considering the Suffolk Coast for days out

DAYS OUT

	BVis2: Prompted	CVis3: During construction	DVis1: After construction	Decline between prompted and after construction
All	66	45	49	-17
	67	44	44	-23
	72	49	52	-20
	*60*	*43*	*48*	-12

-21

+4

*It is important to note that for all audiences there exists a notional uplift in consideration to visit, from their initial unprompted consideration to visit the Suffolk Coast for a days out or holiday and their prompted consideration Yes to visit the Suffolk Coast for a days out or a holiday during construction

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Base: All regional market aged 16+ (n=1,700)

Important pre-familiarity audience, used for economic impact indicators, less impacted by the proposed developments for days out. However unprompted considerators are.

DAYS OUT

Consideration by Key audiences – Pre-familiarity and Unprompted considerators

% who said yes they are considering the Suffolk Coast for days out

	BVis2: Prompted		CVis3: During construction		DVis1: After construction	Decline between prompted and after construction
All	66		45		49	-17
Pre-familiarity	87	-9	78	0	78	-9
Unprompted considerator	80	-22	58	+3	61	-19

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Further analysis of Days Out consideration changes by other profiled audiences can be found in Appendix 1

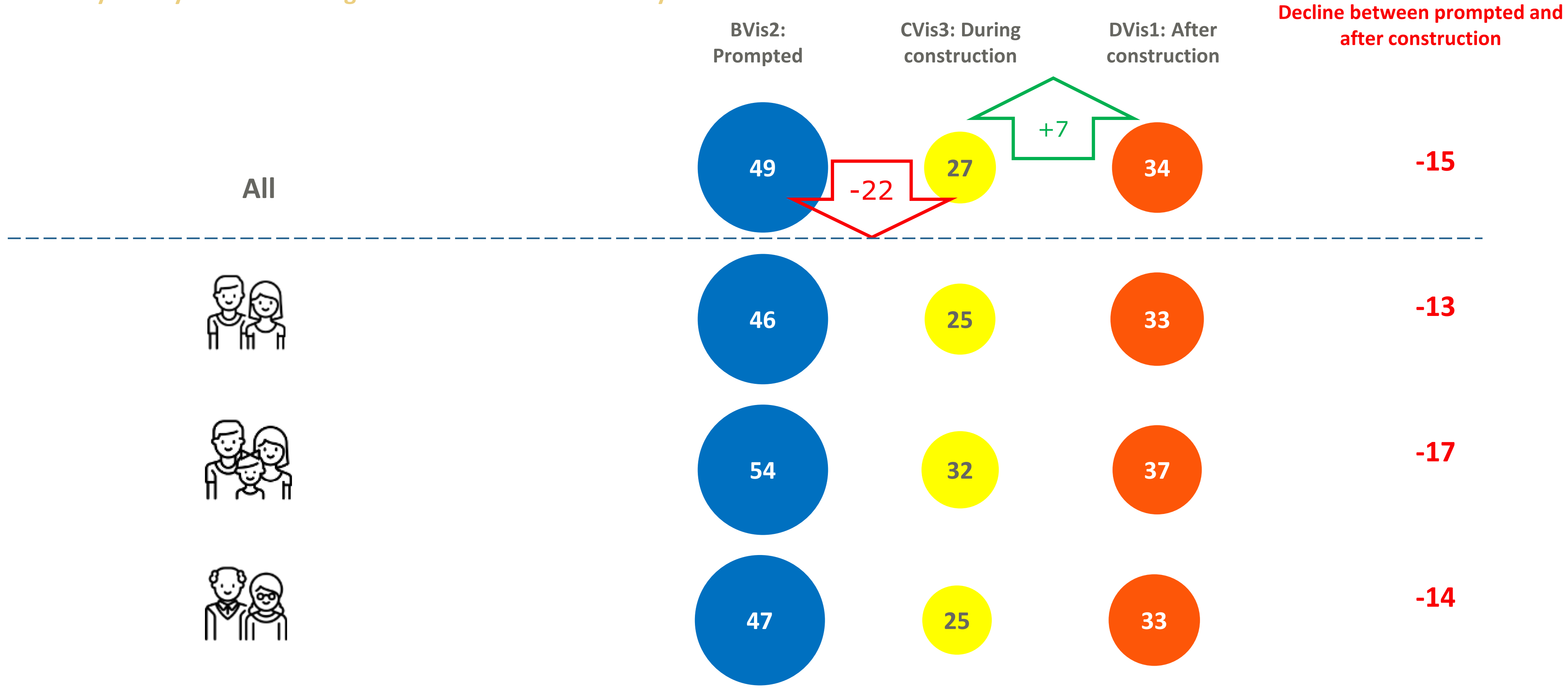
Base: All regional market aged 16+ (n=1,700)

Decline in consideration for holidays from prompted to during construction similar as that for days out. However uplift after construction a little stronger. All lifestages equally impacted during construction.

HOLIDAY

Consideration By Lifestage – Regional Market

% who said yes they are considering the Suffolk Coast for holidays



Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

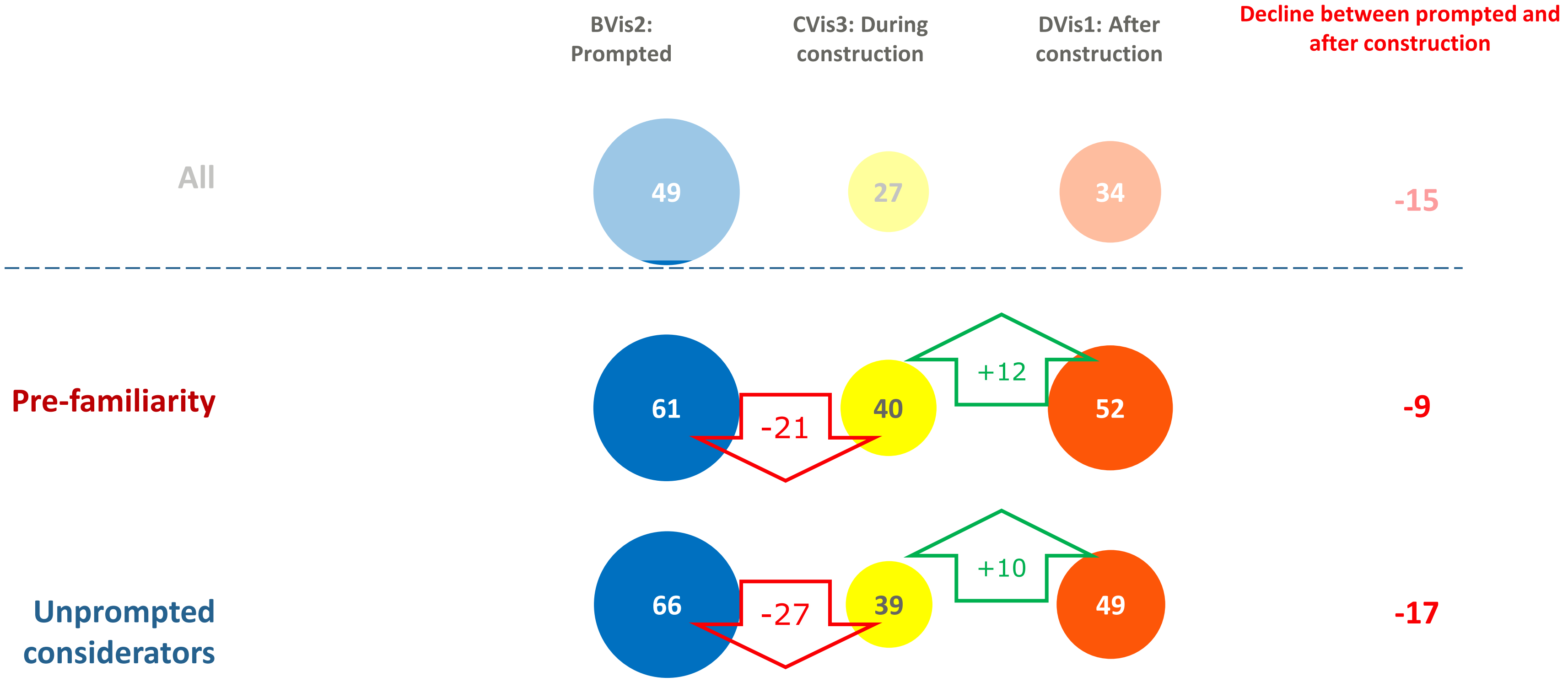
Base: All regional market aged 16+ (n=1,700)

Important pre-familiar audience, used for economic impact indicators, are less impacted by the proposed developments in the longer term but are as impacted as overall during construction. From unprompted considerators the decline for holidays is more severe.

HOLIDAY

Consideration by Key audiences – Pre-familiarity and Unprompted considerator's

% who said yes they are considering the Suffolk Coast for holidays



Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Further analysis of Holiday consideration changes by other profiled audiences can be found in Appendix 1

Base: All regional market aged 16+ (n=1,700)

Summary: Annual Economic Impact during construction

With fewer people prepared to consider visiting the Suffolk Coast during construction of the energy developments, fewer trips will happen. There will be a negative impact on direct visitor spend generated by this reduced activity. In this analysis we mapped survey responses to current trip numbers and rounded spend. Annual economic impact projections were modelled via three audience lenses.

Our promoted analysis draws on responses from the **pre-familiarity** audience i.e. previous visitors to the Suffolk Coast who already claim some awareness of what there is to see and do on the Suffolk Coast and of the energy developments. Viewing economic impact through this lens delivers a more positive scenario than if we had promoted the analysis from the perspective either of **all online regionally representative market** or **all unprompted considerators.**

Current visitor trip spend per annum
generated by 4,167,368 trips (day & staying) and excluding indirect/induced spend
£164million*

DAYS OUT

Current total day trips (volume before construction): **3,860,768***
generating
Current total day trip spend (volume before construction): **£84million***
Average = £21.89 per trip

Assume 87% current consideration equals current 3,860,768 day trips. Day trips to **decline 9%** as result of pre-familiarity days out visit consideration declining from current 87% to projected 78% during construction of energy developments *(see slide 36).*

Projected total day trips (volume during construction): **3,513,299**
generating
Projected total day trip spend (volume during construction): **£77million**

HOLIDAYS

Current total staying trips (volume before construction): **306,600***
generating
Current total staying trip spend trip spend (volume before construction): **£79million***
Average = £257.45 per trip

Assume 61% current consideration equals current 306,600 staying trips. Staying trips to **decline 21%** as result of pre-familiarity holiday visit consideration declining from current 61% to projected 40% during construction of energy developments *(see slide 38).*

Projected total staying trips (volume during construction):**242,214**
generating
Projected total day trip spend (volume during construction): **£62million**

POTENTIAL NET ANNUAL IMPACT DURING CONSTRUCTION - £24million

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

Of those still considering visiting the Suffolk Coast during and after construction their frequency of visit is not expected to change dramatically - some visiting more often, some visiting less, the majority unchanged.

Cvis4/Dvis2: And would you consider visiting the Suffolk Coast for days out / holidays whilst the infrastructure is being built?/once the construction of Sizewell C and the wind turbines are completed in 9-12 years? (%)

	More frequently than you do today	As frequently as you do today	Less frequently than you do today	Don't know
During Construction				
Days out (n=514)	12	62	20	5
Holidays (n=227)	15	66	15	4
After Construction				
Days out (n=534)	11	67	15	7
Holidays (n=260)	14	69	13	3

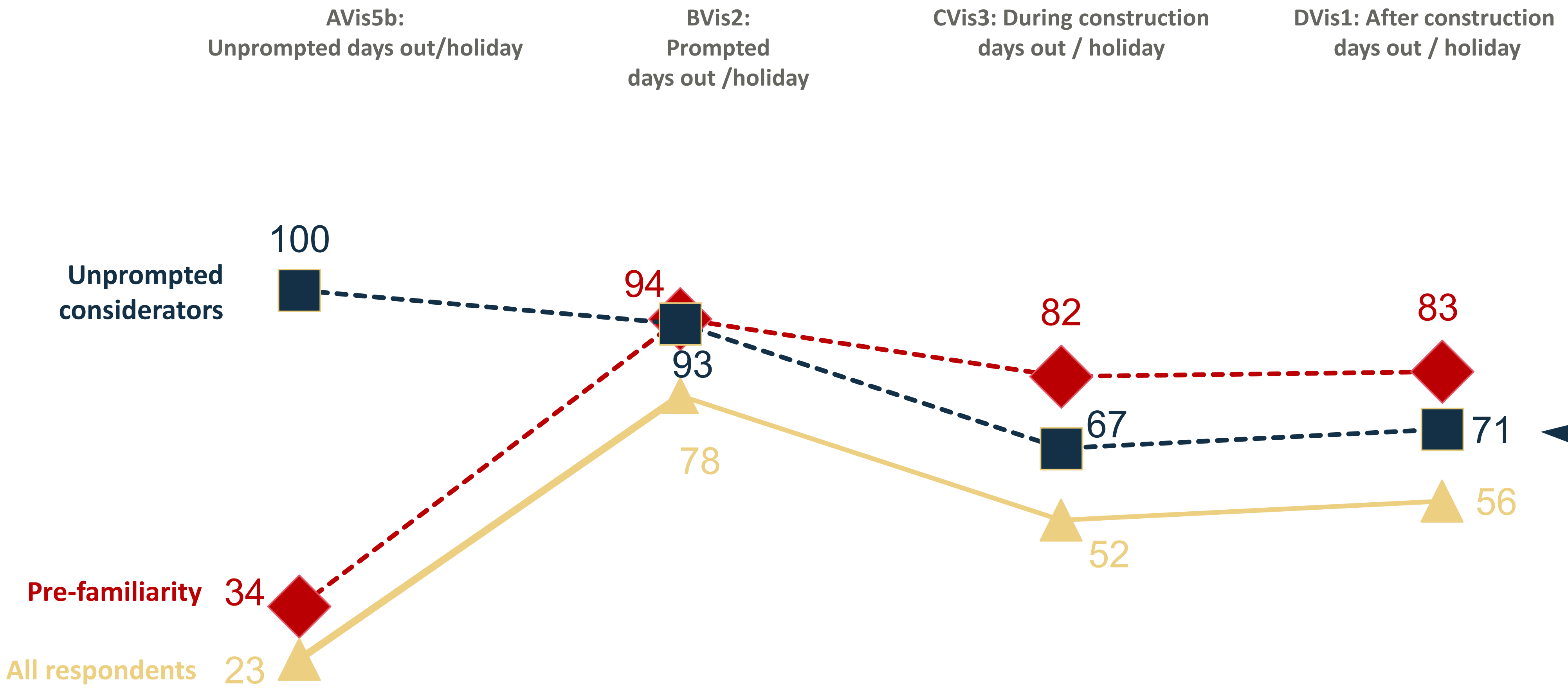
Base: All regional market aged 16+ who have been on a days out/holiday to the Suffolk Coast and said yes considering future days out/holiday

Net: consideration of days out and/or holidays to Suffolk Coast reinforces negative impact overall of energy developments

DAYS OUT

HOLIDAY

% who said yes they are considering the coastal area of Suffolk / The Suffolk Coast for days out and/or holidays at each stage



There was **-29%pt** decline in those considering the Suffolk Coast who were 100% sure to consider to start with.

Base: All online respondents (n=1700) Pre-familiarity (n=157); Unprompted Considerators (n=390)

Businesses on the Suffolk Coast

Concerns & perspectives

Summary:

A high proportion of businesses expect to see their turnover fall as the developments undermine what makes the Suffolk Coast attractive to visitors and tourists.

A majority of businesses interviewed are gearing themselves up for potential losses in turnover once the developments get the go ahead.

Concern levels are running high, with a significant 23% expecting to see a drop in turnover over 50%.

Accommodation providers were more pessimistic about their prospects, which is unsurprising, given their heavier reliance on tourists compared to other business types.

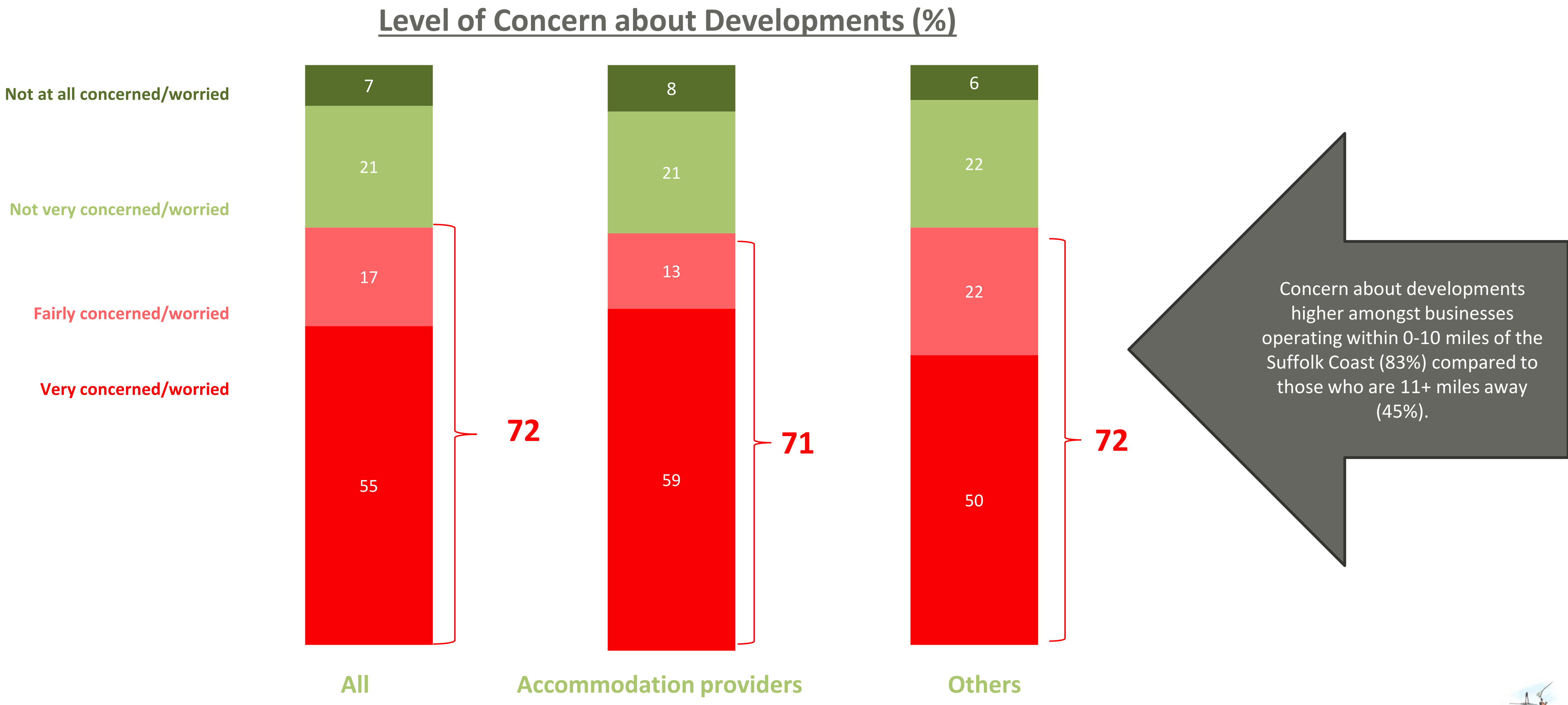
- **More than half of businesses (58%) expect their turnover to decrease, with accommodation providers (67%) more pessimistic than other business types (46%).**
- **Loss of tranquillity, traffic congestion, loss of natural landscapes within the AONB, damage to wildlife habitats, road obstructions, noise pollution and loss of the area's unique charm were the main concerns.**
- **There is an underlying sentiment that businesses operating within the Suffolk Coast, and not its periphery will bear the brunt of the negative impacts generated by the developments.**
- **Just over 60% of businesses predict that visitors are a little/lot less likely to return to the Suffolk Coast once the developments are completed.**

<u>This section examines:</u>

- How concerned businesses are about the proposed energy developments
- What concerns businesses the most about these developments
- Predicted impacts on staffing, turnover and occupancy rates
- General thoughts and sentiment about the energy developments and their impact on tourism to the Suffolk Coast

Concern about the development is high amongst businesses, with some 72% stating they are either fairly or very worried.

CBus7: How would you describe your level of worry/concern if any, about this period in terms of the possible negative impact on your business/organisation?

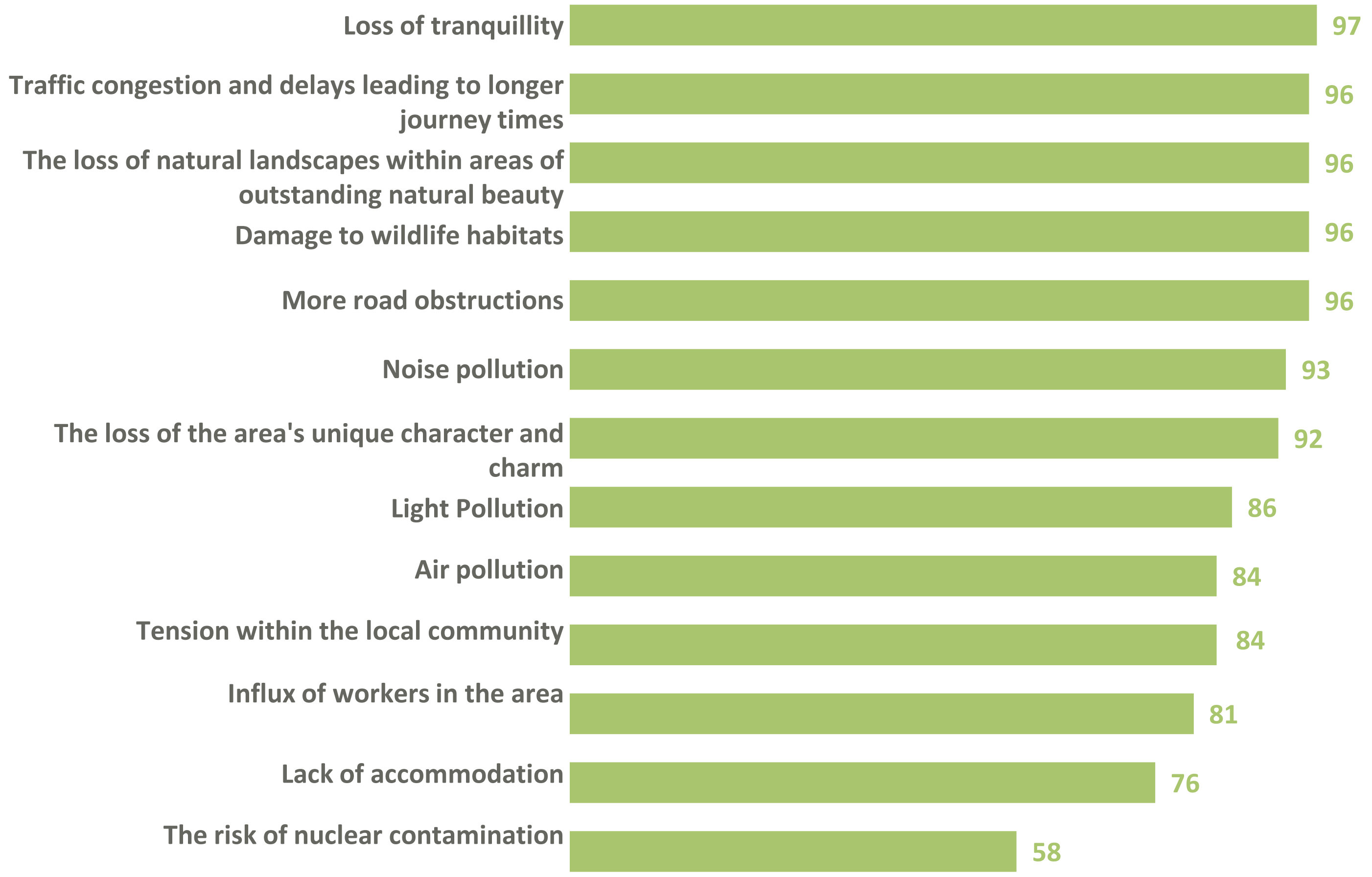


Base: All business respondents (n=113)- accommodation providers (n=63) and others (n=50)

Businesses, believe the negative impact of the developments will be far reaching, affecting the area’s wildlife and natural beauty as well as causing traffic congestion and pollution. Concern about the risk of nuclear contamination is the least of their worries - though it remains clearly an issue for many.

C5: In your opinion, which of the following potential concerns will have a negative impact on tourism whilst the infrastructure is being built for Sizewell C and the wind turbines with construction of onshore infrastructure?

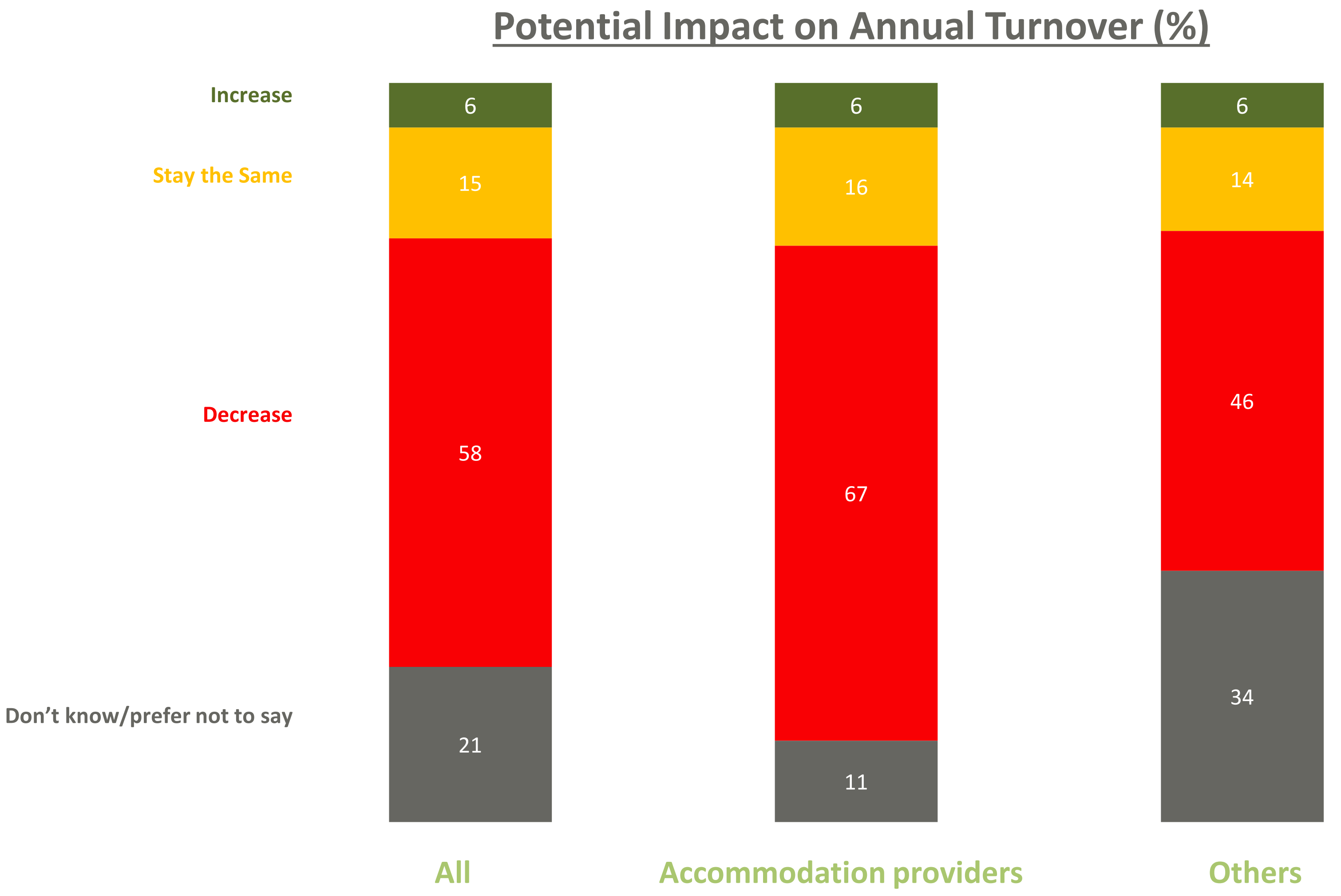
Concerns that will have a negative impact on tourism in the Suffolk Coast during construction (% any negative impact)



Base: All business respondents (n=113)

Some 58% of businesses except their turnover to decrease, with accommodation providers more pessimistic than other business types.

CBus8a: All other things being equal, what do you think the impact will be on your annual turnover during this period, as a direct result of the development?

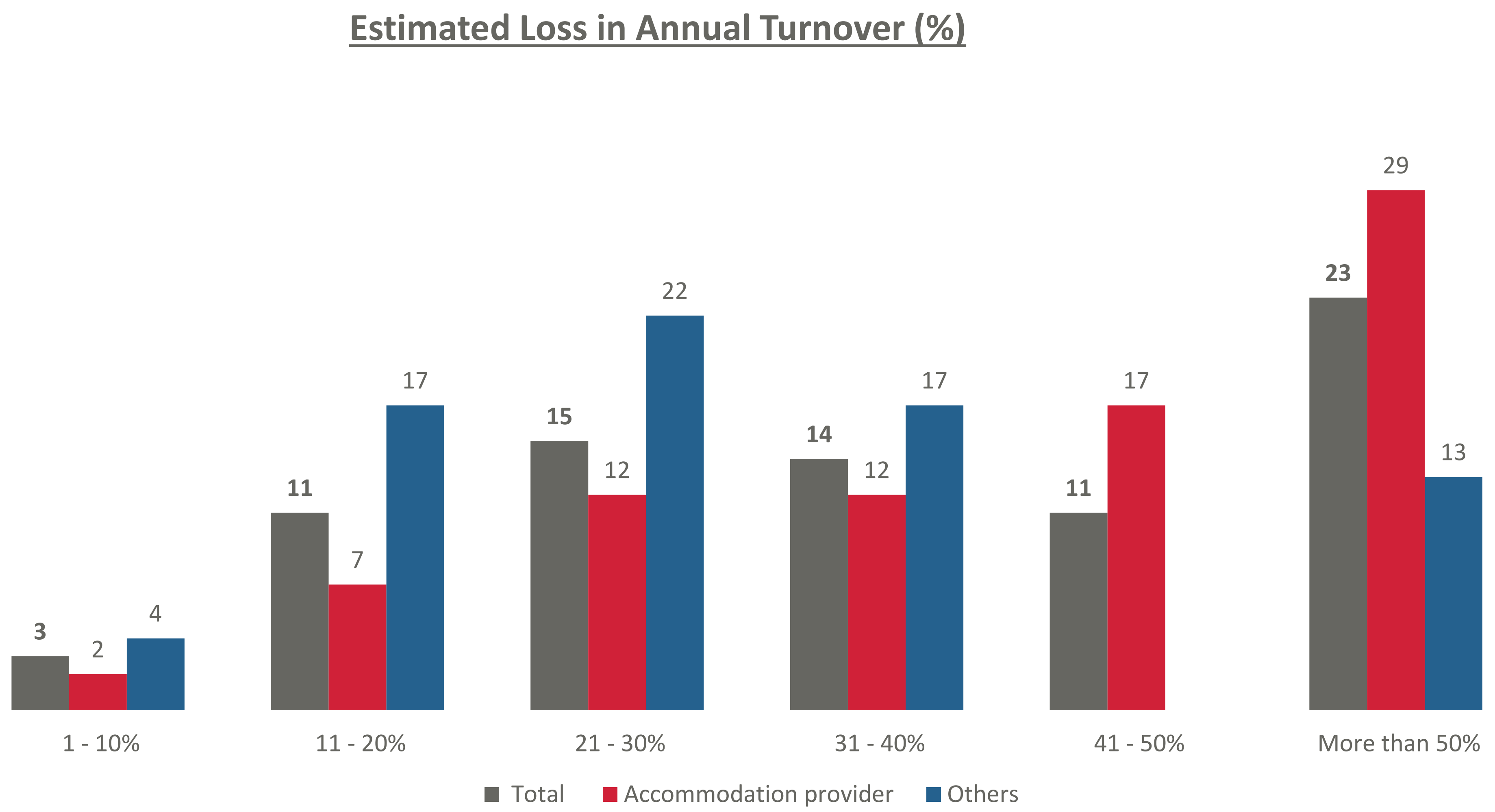


Businesses aware of Sizewell C were the most inclined to expect to see a decline in turnover **(75% vs. 58% overall).**

Base: All business respondents (n=113)/All accommodation providers (n=63) and others (n=50)

29% of accommodation providers who foresee a loss in turnover, expect their revenue to drop by 50% or more, compared to just 13% of other businesses.

CBus9: By how much do you estimate your annual turnover will decrease during the period?

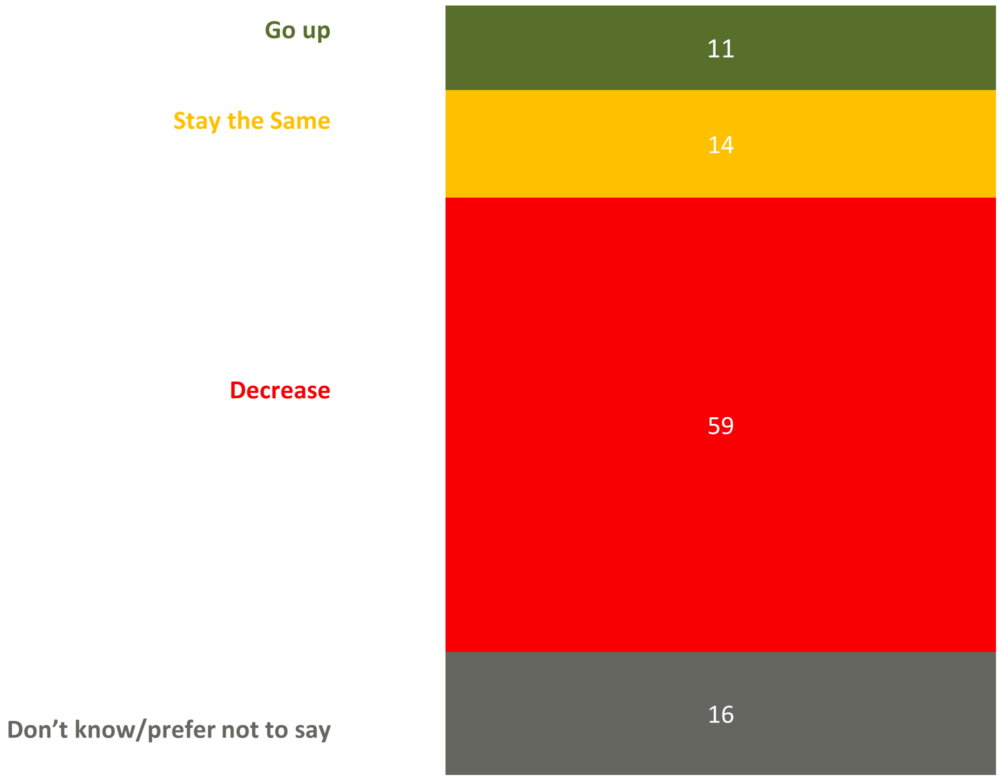


Base: All business respondents who expect a loss in turnover (n=65)

Almost three-fifths of accommodation providers expect to see a drop in occupancy rates because of the energy developments. Out of these, 30% expect their occupancy rates to fall by more than 50%.

CBus10: All other things being equal, what do you think will be the impact on your annual occupancy rate during this period, as a direct result of the development?

Potential Impact on Annual Occupancy Rates (%)

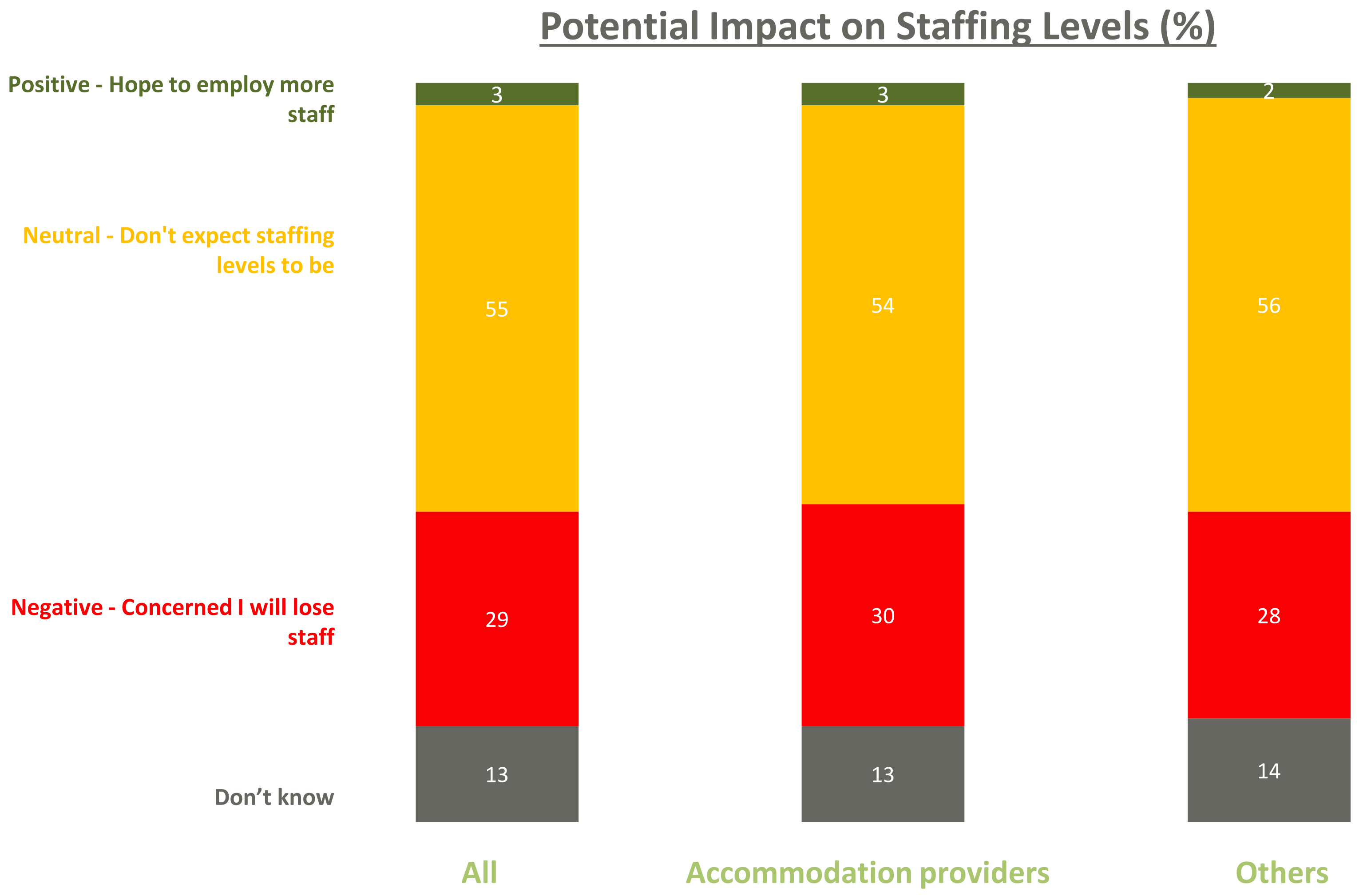


Potential Loss in Occupancy (% of respondents)	
1 - 10%	-
11 - 20%	8
21 - 30%	16
31 - 40%	14
41 - 50%	16
More than 50%	30

Base: All business respondents who are accommodation providers (n=63)/ all business respondents who are accommodation providers that expect a loss in occupancy (n=37)

Businesses are less pessimistic on the staffing front, with the majority at least expecting it to remain the same during the construction period

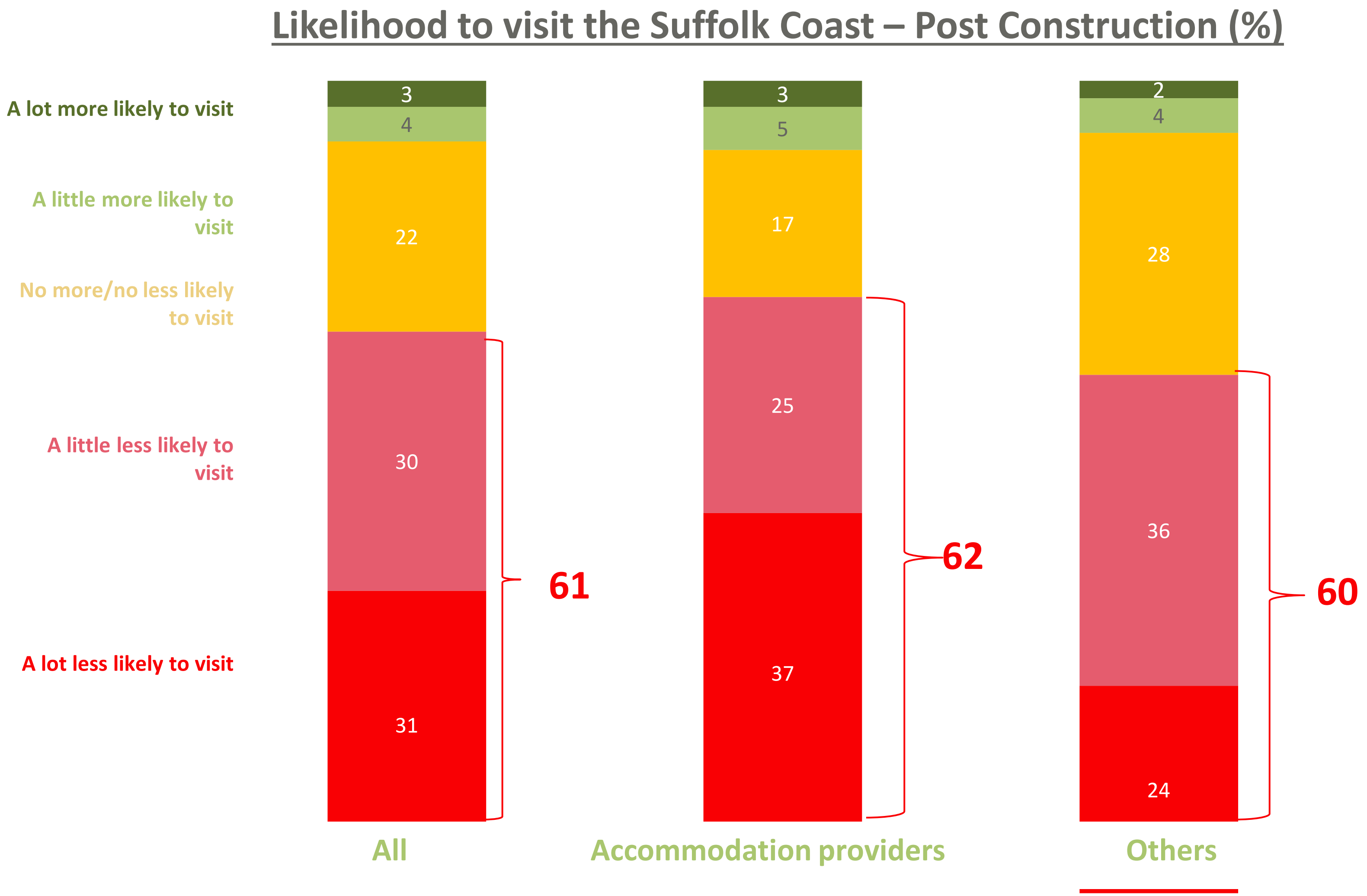
CBus12a: Do you think the construction will have a positive or negative impact on staffing levels at your business during this period?



Base: All business respondents (n=113)/All accommodation providers (n=63) and others (n=50)

Just over 60% of businesses predict that visitors are a little/lot less likely to return to the Suffolk Coast once the developments are completed.

Once the construction of Sizewell C and the wind turbines with their onshore infrastructure are completed in 9 to 12 years, do you think visitors are more or less likely to visit the Suffolk Coast for days out or holidays compared to recently?



Base: All business respondents (n=113)/All accommodation providers (n=63) and others (n=50)

Businesses Who Expect their Turnover to Decline

What do they think about the proposed developments?

*"Our business is 99.9% leisure and the age group is 60 plus. They come to Aldeburgh because it is still **peaceful and charming** and the surrounding areas of Orford to Southwold are their main destinations. If either of these projects go ahead then the tourist route between Southwold and Aldeburgh will be cut in half. Minsmere bird reserve will be overshadowed and the walks down the coast from Aldeburgh will end abruptly at Sizewell."*

Accommodation Provider – Hotel

*"The majority of my guests are bird watchers. Not only do they spend the majority of their time at Minsmere but also walking around the immediate area to my business. **The constructions will have a terrible effect on the bird population.**"*

Accommodation provider – Self Catering

*"**Our guests enjoy the stars at night, the birds and wildlife, peace and quiet, and the countryside views from the windows.** They also like the relative ease of travel in the area. The enormity of the construction work will completely change the characteristics of this area."*

Accommodation provider – Self Catering

*"The proposed Sizewell C and onshore windfarm station and the associated Energy Gateway development theme, with its focus on road building and housing infill, would in my opinion **radically undermine the quality of the East Suffolk landscape - which is the anchor for the areas food / landscape / arts sector.** The landscape quality is the principal anchor, attractor and value-multiplier for this economy. In the absence of this approach, there is a very high risk of asset degradation, through rapid loss of landscape character and landscape quality : through air, noise and light pollution; increasing traffic flow; lack of sustainable housing planning and plain loss of countryside."*

Visitor Attraction

*"I believe that the construction period will affect numbers. We are a growing business that has built our audience on the fact that we are in a unique, beautiful area. **Many of our national visitors will chose other festivals where they can take their holidays in a more peaceful and undamaged environment and where accommodation will be easier to find.***

Other

*"The industrialisation of the Suffolk Coast removes a lot of the reasons to visit the area. **The media attention about the planned works is also extremely unhelpful and undoes a lot of previous marketing which focused on raising the profile of the Suffolk Coast as a tourist destination and an AONB.** The planned road works and significant increases in traffic will also deter people from taking day trips to the area. It will lose its tranquil charm."*

Accommodation Provider – Hotel

Concerns about a negative impact on turnover are rooted in four main issues: the loss of the area's unique charms that differentiate it from other costal destinations in the UK; traffic congestion and disruption; damage to wildlife, as well as the loss of tranquilly.

Businesses fear its perception as a leading destination to relax in a beautiful natural setting would be diluted and lost forever, once construction gets underway.

There is an unstated sentiment that any negative impact of the developments would be borne principally by those operating within the Suffolk Coast, and not businesses on the periphery.

Ironically, those on the periphery claim that a greater proportion of their revenue derives from visitor expenditure – possibly because they expect that the influx of workers into the area will help plug the predicted decline.

Businesses Who Expect their Staff Numbers to Decline

What do they think will happen to staffing levels if the proposed developments went ahead

*"We will struggle to pay wages with decreased turnover and **cannot compete with the higher pay rates** offered by EDF and Scottish Power."*

Food and Drink Provider

*"Experience of Sizewell B -a much smaller project- saw difficulties in recruiting staff, tradesman rates were inflated opportunistically. **The area has pretty full employment already. What it needs is more businesses creating high paid jobs for bright school leavers who tend to leave the area. Not big construction projects which suck in labour for a short while and then cause a local slump when they are complete.** The legacy jobs for these projects are very low in number when compared with their scale."*

Accommodation Provider – Self-catering

*"These projects are not just construction and will **offer a range of jobs to local people. They will require a level of hospitality staff, cleaners, admin etc."***

Visitor attraction

SPR and EDF are both predicted to offer better rates of pay – hence they could potentially poach staff – who are already in short supply from local tourism businesses.

Quantifying the potential impact

Deterrents and concerns

Summary:

During construction the loss of tranquillity, natural landscapes and the Suffolk Coast's unique charms are the concerns most likely to deter visitors from visiting.

Although consumers do not feel as strongly about the potential deterrents as businesses, their chief concerns are more or less similar.

Whilst concerns around traffic congestion and delays leading to longer journey times are a strong deterrent for many, the loss of natural landscapes is as much a concern. Nature related concerns in total represent the biggest deterrent to visitors during the construction phase of the developments. These concerns will be difficult to mitigate against.

Attempts to brand the Suffolk Coast as the Energy Coast should be discouraged as it will currently have a negative impact on tourism.

- **Seven genuine concerns are deterring more than a half of potential visitors from visiting the Suffolk Coast during construction.**
  - **Traffic congestion and delays leading to longer journey times and the loss of natural landscapes within areas of outstanding natural beauty deterring the most.**
  - **Net Nature related concerns are most deterring for 2 in 5 respondents whilst Net Road and traffic related concerns are most deterring for just 1 in 5.**
- **The 'Energy Coast' brand is viewed mainly in a negative light. However, about one in ten of the regional market, view it as a positive move.**
  - **Empty Nesters and those who visit the Suffolk Coast less frequently are the most inclined to view the 'Energy Coast' brand negatively.**

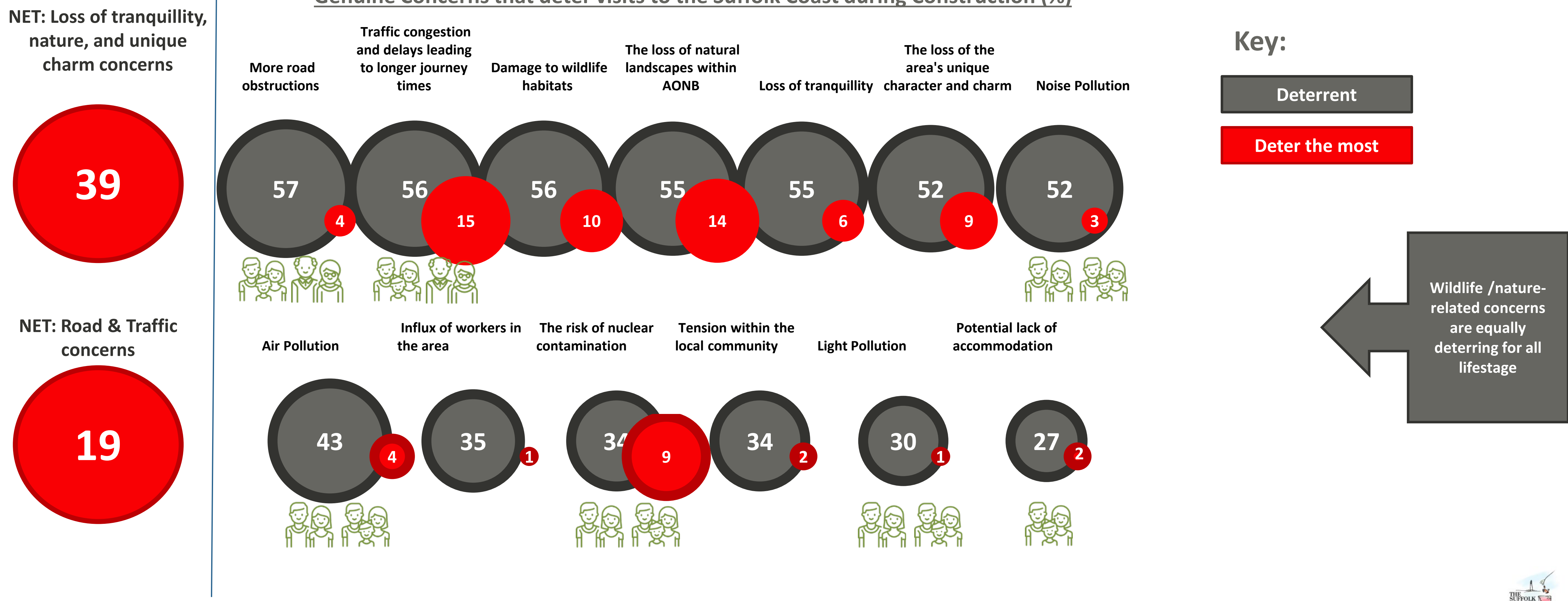
This section examines:
- Primary deterrents to visits to the Suffolk Coast
- Who is most likely to be deterred from visiting
- Reactions to the proposed 'Energy Coast' branding and the propensity to visit

Seven genuine concerns are deterrents for at least a half of all potential visitors during construction. Net Nature related concerns are most deterring for 2 in 5 of the market.

CVis5i: During the construction phase of Sizewell C and the wind turbines with construction of onshore infrastructure, which, if any of the following do you believe to be genuine concerns likely to deter you from visiting during this period? If you don't think an issue is likely to be a concern in the first place please say no.

CVis5ii: And which is the concern most likely to deter you the most?

Genuine Concerns that deter visits to the Suffolk Coast during Construction (%)

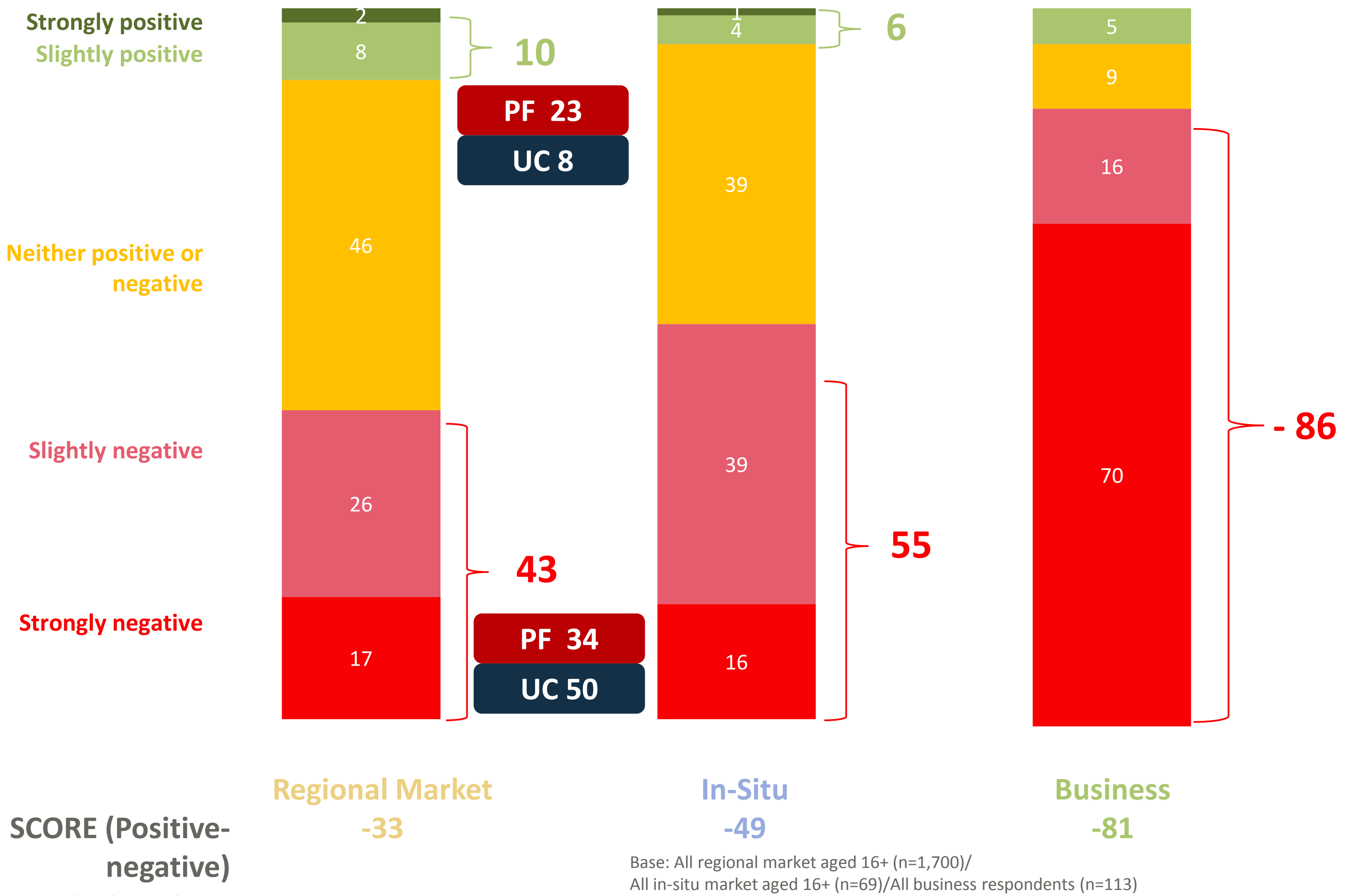


Base: All regional market aged 16+ (n=1,700)

A significant minority (43%) of the regional market are put off the Suffolk Coast by ‘Energy Coast’ branding. Businesses feel more strongly that it will be a much more negative brand development.

DAII4: More widely if the Suffolk Coast became known as ‘the Energy Coast’ and more energy projects were constructed in the future do you think this would have a positive or negative impact on your propensity to visit the area? tourism on the Suffolk Coast?

‘Energy Coast’ Branding – Potential Impact on Suffolk Coast Tourism (%)



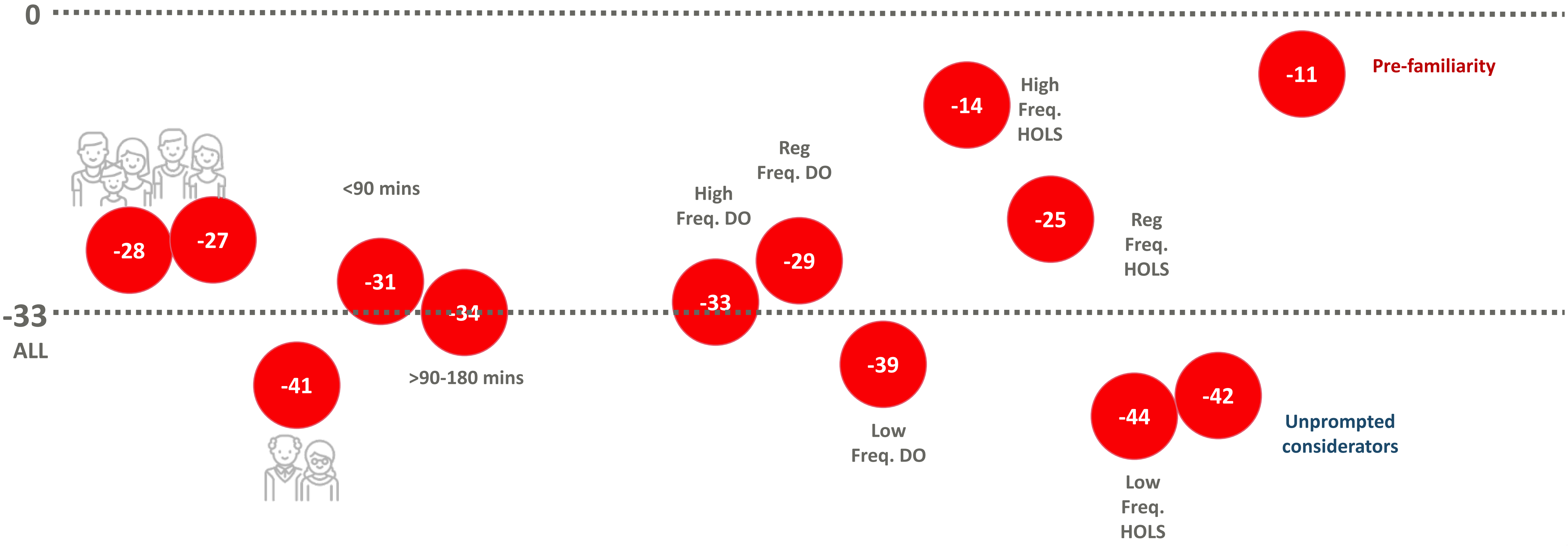
Base: All regional market aged 16+ (n=1,700)/
All in-situ market aged 16+ (n=69)/All business respondents (n=113)

Every audience has a net negative perception of Energy Coast branding with the net overall figure of -33. Empty nesters, those who visit the Suffolk Coast infrequently and unprompted considerators are the most pessimistic about the 'Energy Coast' branding. Although most positive about the brand the key pre-familiarity niche still hold a clear net: negative position of -11

DAII4: More widely if the Suffolk Coast became known as 'the Energy Coast' and more energy projects were constructed in the future do you think this would have a positive or negative impact on your propensity to visit the area?

Positive vs Negative Scores: 'Energy Coast' Branding –

(Strongly Positive + Slightly Positive) – (Slightly negative + Strongly negative)



Base: All regional market aged 16+ (n=1,700)

Sizing up opportunities

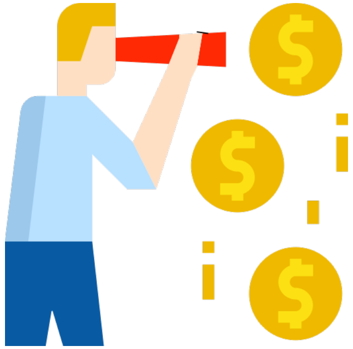
Mitigating the impact

Summary:

There are many opportunities for targeted tourism investment to encourage visits. New initiatives generally receive the greatest support from families and pre-family audiences.

Offering opportunities for visitors to explore the Suffolk Coast independently on top of specialist interest tours are the main initiatives that could be adopted to help encourage future visits.

Pre-families and families are more likely to be encouraged by the provision of such activities than Empty Nesters particularly for spa and wellness retreats, development of the cycling offer, hands-on activities and water sports.



There was also a clear consensus to develop the area's performing arts and cultural assets, particularly from the pre-familiar niche segment.

Businesses also called for more cross-sector collaboration to leverage resources and meet the needs of visitors more strategically.

- **Specialist interest tours in natural areas of beauty and wildlife were cited as the top initiative to encourage visits to the Suffolk Coast in future (47% encouraging)**
    - **This was followed by improved transportation links between towns/villages and detailed online guides or apps.**
    - **Generally, families prefer active, exploratory options while pre-families prefer relaxing or educational/cultural activities.**
    - **Development of the cycling offer also appeals highly to both the family and pre-family segments.**

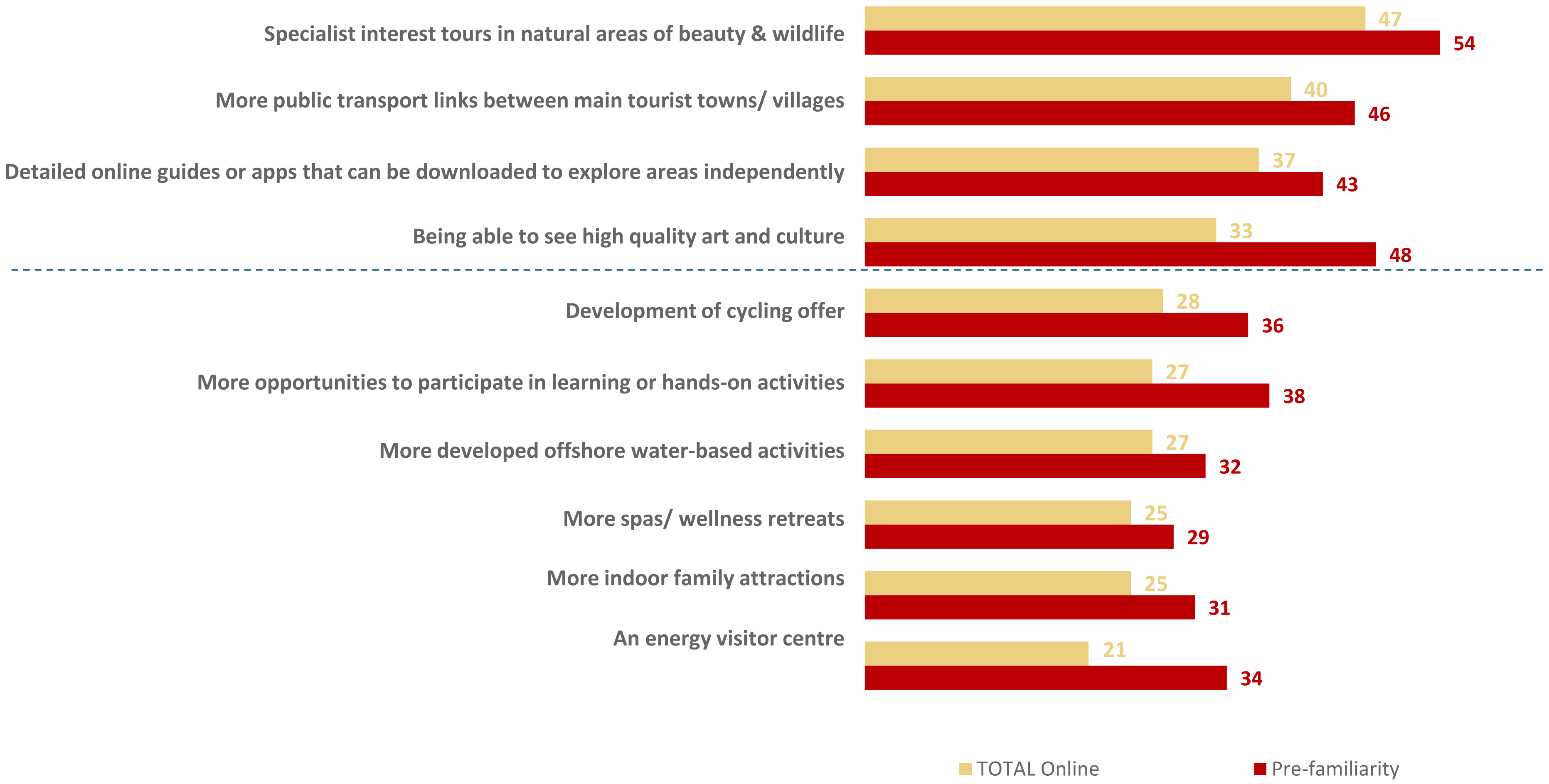
<u>This section examines:</u>

- What initiatives and areas should be developed to mitigate the impact of the every developments on tourism in the Suffolk Coast

A focus on specialist interest tours, better transport links, and apps are the main potential developments that would bolster visits to the Suffolk Coast. The pre-familiarity niche demonstrate a significantly higher propensity to want to see high quality art and culture.

EAII1: Which, if any, of the following developments would encourage you to visit the Suffolk Coast more often or stay for longer in the future?

Developments that could potentially encourage visits – post construction (% encouraging i.e. NET: very/somewhat)



Lifestage variances

Empty Nesters more lukewarm to all suggestions featured.

Families prefer active, exploratory options while pre-families prefer relaxing or educational activities.

Cycling appeals highly to both the family and pre-family segments.

Base: All regional market aged 16+ (n=1,700)/
Unprompted Considerators (n=390)/Pre-familiarity (n=157)

What Will Encourage Visitors to the Suffolk Coast?

What should be done to encourage tourism in the Suffolk Coast post-construction?

*"Create something for everyone. With this, I don't mean a Great Yarmouth style frontage with loads of arcades but to have an even mix. The Suffolk coast has a lot to offer. It has **a beautiful coastline with a lot of nature parks and of course, amazing beaches - we need to make more of it without turning it into something tacky."***

Been to Suffolk Coast for a holiday

*"I think Norfolk has more attractions and it would be nice to have a few more in Suffolk. **Aldeburgh could have more celebration of Britten and his work."***

Been to the Suffolk Coast for days out/holidays

*"**Off-road cycle paths linking key tourist locations/villages - for example, Orford, Snape and Aldeburgh.** These would also appeal to local people, and enable visitors to avoid being in traffic congestion while reducing road congestion."*

Been to the Suffolk Coast for days out/holidays

*"**Guided tours by experts** in history, architecture and wildlife."*

Been to the Suffolk Coast for days out/holidays

Suggestions included opening more family attractions; more wildlife conservation; sustainability initiatives to conserve the AONB area; improving cycling and coastal paths; providing better transport links between villages and towns along the coast; and to do more to showcase the area's cultural, music and art offerings.

Businesses value the same things, especially in activities attractive to the Grey pound such as bird watching and cultural programmes. There was also **a call for more cross-sector co-operation and dialogue to tourism product development and destination marketing.**

*Access to the countryside and coast, **no largescale commercial development, emphasis on activities such as walking, bird watching, sailing, the music and the Arts,** the retention of peace and quiet. These are all things that visitors say they love about this part of England. I have been running my business since 1975 and I know what they like because I talk to them .**Our market is the Grey Pound and it is a very good market to be in with potential to grow.** Income from tourism will far outweigh income from industrial development which in any case will be short term, and when finished, will leave behind **a shattered legacy**.*

Accommodation Provider – Hotel

Summary evaluation by lifestage

How each lifestage would be impacted

	Commune with nature & relax **Pre-Family**	Explore, Bond & Relax **Family**	Hassle-free, relaxing escape into nature **Empty Nesters**
% Unprompted considerators of Suffolk Coast	21	24	23
TOP 3 Main Motivation to visit Suffolk Coast in future (specific nature related)	To discover new places (33%), To relax in a tranquil and natural setting (33%) To have a change of scenery (29%),	To discover new places (29%), To spend quality time with loved ones (28%), To relax in a tranquil and natural setting (27%),	To appreciate AONB (32%), To relax in a tranquil and natural setting (32%), to have a change of scenery (29%)
Fall in Consideration (Prompted vs. After Construction)	DAYS OUT: -23 HOLIDAYS: -13	DAYS OUT: -20 HOLIDAYS: -17	DAYS OUT: -12 HOLIDAYS: -14
Top 2 concerns deterring the most during construction (specific nature related)	Damage to wildlife habitats (14%), Loss of natural landscapes (13%)	Loss of natural landscapes (14%), Traffic Congestion and delays (11%)	Traffic Congestion and delays (21%), Loss of natural landscapes (15%),
'Energy Coast' Branding Score (Positive-Negative)	-28	-27	-41
Main encouragements to return to Suffolk Coast (sig.difference)	Spa & Wellness, Cycling Offer, Hands on Activities, Water Activities	Specialist Tours, Spa & Wellness, Cycling Offer, Energy Visitor Centre, Hands on Activities, App Guides, Indoor Family Attractions, Water Activities	-

Base: All regional market aged 16+ (n=1,700)

Appendix 1 – Changing consideration to visit Suffolk Coast - other profiled audiences

High frequency (at least 6 times a year) current visitors consideration to visit, less negatively impacted.

Majority will not be changing their frequency of visit either see slide 50.

DAYS OUT

Consideration by Frequency of Visit – Regional Market

% who said yes they are considering the Suffolk Coast for days out

	BVis2: Prompted	CVis3: During construction	DVis1: After construction	Decline between prompted and after construction
All	66	45	49	-17
High	86	76	80	-6
Regular	91	71	72	-19
Low	72	44	53	-19

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Base: All regional market aged 16+ (n=1,700)

Unsurprisingly the visit friends and family motivated audience less negatively impacted by developments.

DAYS OUT

Consideration by Visit Type – Regional Market

% who said yes they are considering the Suffolk Coast for days out

	BVis2: Prompted	CVis3: During construction	DVis1: After construction	Decline between prompted and after construction
All	66	45	49	-17
Visiting friends & family	71	54	63	-12
Not visiting friends and family	76	57	60	-16

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Base: All regional market (n=1700) All who had visited Suffolk Coast for visiting friends and family (n=99) All those who had visited Suffolk Coast for reasons other than visiting friends and family (n=914)

Higher proportions of near regional market considering days out to Suffolk Coast at every stage, but significant decline from both markets.

DAYS OUT

Consideration by Distance – Regional Market

% who said yes they are considering the Suffolk Coast for days out

	BVis2: Prompted	CVis3: During construction	DVis1: After construction	Decline between prompted and after construction
All	66	45	49	-17
Near regional	74	53	55	-19
Wider regional	60	40	44	-16

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Base: All regional market aged 16+ (n=1,700)

national coastal tourism academy

Even those with prior awareness of the energy developments are less likely to consider visiting when reminded of the scale of the developments taking place.

DAYS OUT

Consideration by Awareness of Sizewell C + SPR – Regional Market

% who said yes they are considering the Suffolk Coast for holidays

	BVis2: Prompted	CVis3: During construction	DVis1: After construction	Decline between prompted and after construction
All	66	45	49	-17
Prior Awareness of Sizewell C only	62	46	54	-12
Prior awareness of SPR only*	77	55	57	-20

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Base: All regional market aged 16+ (n=1,700) *small base (n=56)

High frequency (At least twice a year) holiday visitors are as negatively impacted as the rest of the market. *Majority of those still visiting will not be changing their frequency of visit either* *see slide 50*

HOLIDAY

Consideration by Frequency of Visit – Regional Market

% who said yes they are considering the Suffolk Coast for holidays

	BVis2: Prompted	CVis3: During construction	DVis1: After construction	Decline between prompted and after construction
All	49	27	34	-15
High	83	63	69	-14
Regular	87	59	65	-22
Low	65	36	51	-14

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Base: All regional market aged 16+ (n=1,700)

Amongst previous visitors the friends and family motivated audience are again less negatively impacted by developments.

HOLIDAY

Consideration by Visit Type – Regional Market

% who said yes they are considering the Suffolk Coast for holidays

	BVis2: Prompted	CVis3: During construction	DVis1: After construction	Decline between prompted and after construction
All	49	27	34	-15
Visiting friends & family	61	40	52	-9
Not visiting friends and family	64	42	52	-12

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Base: All regional market (n=1700) All who had visited Suffolk Coast for visiting friends and family (n=99) All those who had visited Suffolk Coast for reasons other than visiting friends and family (n=914)

Distance does not seem to be a discriminator for consideration of holidays either.

HOLIDAY

Consideration by Distance – Regional Market

% who said yes they are considering the Suffolk Coast for holidays

	BVis2: Prompted	CVis3: During construction	DVis1: After construction	Decline between prompted and after construction
All	49	27	34	-15
Near regional	46	25	31	-15
Wider regional	52	29	36	-16

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Base: All regional market aged 16+ (n=1,700)

Awareness of Sizewell C alone seemingly leads to a bigger decline for considering holidays along the Suffolk Coast post-construction vs. knowledge of SPR wind turbines alone.

HOLIDAY

Consideration by Awareness of Sizewell C + SPR – Regional Market

% who said yes they are considering the Suffolk Coast for holidays

	Avid5b: Unprompted days out/holiday	BVis2: Prompted	CVis3: During construction	DVis1: After construction	Decline between prompted and after construction
All		49	27	34	-15
Aware of Sizewell C only		45	24	30	-15
Aware of SPR only*		46	30	38	-8

Having read a description of the offer, is the Suffolk Coast somewhere you're considering visiting in the future? (prompted)

So specifically whilst the infrastructure is being built, is the Suffolk Coast somewhere you are now considering visiting?

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 again?

Base: All regional market aged 16+ (n=1,700) *small base (n=56)

Appendix 2 – Project team, accreditation & statistical differences

Project Team

[redacted]

Max CLAPHAM

Director

[redacted]

[redacted]

Linda HADEN

Research Manager

[redacted]

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, 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.

Base	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%