



FRIENDS *of the* RIVERS *Alde & Ore*

Working for people who depend upon and enjoy the Rivers Alde & Ore

Study to establish the economic significance of the recreational and commercial uses of the Alde/Ore Estuary

Dr J Arwel Edwards & Dr Colin J Thomas
Swansea

March 2004



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Nicholas Bushill
Chairman, Friends of the Rivers

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Every opportunity has been taken to incorporate the views of individual contributors and organizations but final editorial control of this document lies with Friends of the Rivers Alde and Ore (FOTR).

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SUMMARY OF MAIN FINDINGS

Background

- The Alde-Ore study area, with a variety of distinctive landscapes and interfaces, is subject to many influences and pressures, some long-term but many of immediate impact, such as the threat of breaches to coastal and/or riverine defences either by default, by design, or by disaster.
- The brief for this study was the need to provide up to date and relevant baseline economic data for the Friends of the Rivers and to inform others whose planning and decision-making will affect the future social, commercial, recreational and environmental well-being of the study area.
- The FOTR study area (FOTRsa) contains a range of unique features, encompassing residential, commercial, recreational, conservational, cultural and historical elements.

An important element of the study was to examine the area's position in the context of a series of reports and policy documents ranging from global summit statements through national, regional, county and district plans. All were found to endorse the concept of 'sustainable development' defined as 'development that meets the present without compromising the ability of future generations to meet their own needs'.

In short, the need to strike an appropriate balance between a healthy economy and a healthy environment.

- While it is located within the East of England economic region (currently ranked 34th in Europe), FOTRsa in some respects is in a static/low growth category – for example, its population grew by only 3.2% between 1991 and 2000 - and has a dependency upon other areas for example for employment, higher order retailing.
- Tourism, one of the five largest industries in the UK, plays an important part in the area's economy. However, trends in visitor numbers in the County to the countryside, historical sites and museums show downward trends between 1995 and 2000 while there has been growth in visitor numbers to cultural attractions. Nevertheless the Cambridge Tourism Model indicates that the overall value of tourism to the County increased between 1998 and 2000.
- Within FOTRsa, the Snape Maltings Riverside Centre is the strongest 'honeypot' attracting not only an estimated 600,000 visitors in 2002 but showing strong and continuing growth trends. Adjacent Snape Maltings Concert Hall (ca 70,000) and Orford Castle (ca 26,000) are also important but many other 'natural/environmental' attractions show very slow growth or even declines.
- A wide range of employment is found in FOTRsa, mostly in the service sectors and in the principal centres of Aldeburgh and Orford.
- Unemployment is very low and mostly frictional, that is of people between jobs

- FOTRsa includes a wide range of areas of outstanding landscapes and environmental attractions which need to be protected and enhanced. European, national, regional, county and district levels of government have recognized these and a wide range of policies have been implemented.
- Implicit in the studies of the estuarine environments is the impact of changes in sea levels which require the development of a long-term, high level defence policy to provide an essential framework for the future physical management of the estuaries of the Rivers Alde/Ore.
- Any strategy for the estuaries should aim to produce a sustainable and balanced framework for the future management of the estuary as a whole, reflecting natural processes, planning pressures, current and future land use, flood defence needs, and environmental issues.
- A key estuarine strategy document published by the Environment Agency (EA) in 1999 recognized six strategy options for the Rivers Alde and Ore. The preferred one was Option S5 which involves a gradual reduction in the level of flood protection at Lantern and King's Marsh while still retreating the line at Aldeburgh. The EAA are currently preparing a 100 year strategy for the area, which is due to be presented in Spring 2004.

The Estuary Economy

Environmental and economic relationships have been examined in a number of surveys of the FOTRsa. These note the economic impacts of visitors, as measured by employment generated and spending patterns. The methods used were:

*A questionnaire survey of **visitors, residents and second-home owners.***

*Interviews with **10 local businesses**, broadly representative of those in the study area.*

*A **desk study** of local sources, and a range of planning and policy documents and studies examining the issues at global, national, regional and local levels.*

*A postal survey of **river users**, mostly sailing club members, visitors, commercial fishermen and interviews with clubs and associations representing other recreational river users.*

Rivers Users, Local Farmers, Aldeburgh Productions

Regular **annual maintenance of vessels** appears to generate the **highest average** level of expenditure (£342). Expenditure on **food and drink** is of a similar order (average £260).

- A second tier of average expenditure is headed by the cost of *mooring* (average £196) and this is followed closely by the cost of *exceptional repairs* (£166) and *Membership fees* (average £144). *Winter storage* (£88) and *chandlery* (£88) are significant at a lower level, and these are followed by items of *special clothing* (£63), *petrol and diesel fuel* (£58) and *specialised sailing equipment* (£55).
- At a much lower level an additional array of expenditures includes *training courses* (£28), *entry fees* (£17), and *sailing licences* (£7).

Responses to the above questionnaire identified 14 variables which were then applied to the total membership *units* (households) of the three local sailing clubs (1,256). Together, they generated a total local annual spend of c £1.9 millions.

- 39% of sailing club members responding stated that they lived within the immediate FOTRsa. A further 24% indicate ownership of a second home within the FOTRsa, 19% are home or second home owners outside the immediate FOTRsa.
- A range of direct impacts of river-based activities are noted, including the functional linkages of local boatyards, mooring and launching incomes, angling trips, ferry passenger income and associated parking. A grand annual total of £133,010 is suggested for these items.
- Data obtained from a group of 19 farmers regularly abstracting fresh water from the Alde and Ore showed that they employ 59 full-time and 120 casual or part time staff on irrigated crops, to whom an annual total of £ 1.79 millions is paid.
- Patterns of expenditure by **visitors** are of two basic types. Locally based holiday makers spend relatively high amounts on accommodation and on self-catering. All visitor groups spend moderate amounts on food and drink. By contrast, the remaining items are dominated by zero expenditure from the majority, but moderate to high levels of expenditure by significant minorities, that is the expenditure of visitors is dominated by spending on relatively few items.
- The levels of spending by the “**resident**” population on a wide range of leisure activities in the Alde-Ore area are quite strong. “Food and drink” emerges as by far the largest item of leisure-based expenditure over an average year (mean of £651). “Travel-related expenditure” (mean of £378) is also represented strongly. A third tier is suggested by expenditure on “*specialist equipment*” (£195) and “*memberships*” (£183) of various clubs.

- **The impact of Aldeburgh Productions is described and estimated at £4.3 millions in 2001, supporting 75 jobs in the local economy in addition to the 25 permanent jobs in Aldeburgh and about 80 seasonal jobs.**
- **Interviews were held with ten local businesses, six of whom were private limited companies, three joint partnerships and one sole trader. They provided significant employment, totaling 361 persons of whom 192 were full time, 145 were part time and 24 casual. Employment was provided for a greater number of males than females.**
- **Three of the ten had gross turnovers of between £500,000 and £1 million, while three were in excess of £1 million.**
- **All ten stated that the Rivers made an economic contribution to their businesses.**
- **All ten wished to see the ‘status quo’ concerning current river defences and considered any negative changes would be deleterious to their businesses.**

A questionnaire survey of residents, visitors and second home owners was conducted between August 2002 and July 2003. Economic findings included:

- Three categories of visitors dominated the survey; those on holiday in the local area (201); those on holiday outside the local area (154); and those coming from a “home base” outside the local area (351). In addition, there were 126 residents and a small sample of 24 second-home owners.
- Visitors were concentrated most strongly amongst the mature family groups and those under 29 tended to be under-represented. They were concentrated amongst the higher status groups (1 and 2), but there was a stronger tendency for the home-based day trippers to display the average regional representation of skilled workers.
- Residents tended to be amongst the older age groups and exhibited strong concentrations amongst the higher status and “retired” categories.
- The distribution of visitors to the area is highly localised, and originates primarily from East Anglia (53%), the South East (23%) and the East and West Midlands (12%). The home-based day-trippers are more drawn even more strongly from East Anglia (80%).
- The formal “tourist” industry for visitors is rather weak and unfocused but the main form for holiday-makers involves stays with friends and relatives (c. 20%). They tend to stay for relatively short periods, with a tendency for concentration in the 1-7 day category.

- Groups comprising two adults dominate the pattern of all three types of visitor (c. 50%). However, larger groups of adults are also an important dimension (c.17%), while a significant minority also include children.
- The great majority of all three-visitor groups arrive at the sites by car (c. >87%). Very few stay less than 30 minutes (<2%). Stays of 1-2 hours are popular for between 28-37% of respondents, while the 2-4 hour category is quoted by between 19-39% of visitors.
- **The principal influences which attract visitors are scenery and landscape (59%) in combination with specific sites such as Snape Maltings, Orford and Aldeburgh. Patterns of leisure behaviour in the area are dominated by these three principal locations. Significant numbers also visit a variety of location on the margin of the area, as part of the leisure activities of the wider sub-region.**
- Nearly 55% indicate the importance of the personal recommendation of friends and relatives, while 74% quote this as the main source of information used.
- **Visitors to the Alde-Ore area participate most strongly in informal pursuits involving an appreciation of the natural environmental and heritage attractions of the area.**
- The incidence of **repeat visits** is high. In fact, at 33% the most frequent category is for “3-10 times over 2 years”. **This pattern attests to the popularity of the area as a leisure and recreation destination for the sub-region and beyond.**

There was a relatively small sample of Home or Second-Home Owners in the Alde-Ore area and so the findings must be regarded as indicative rather definitive of the issues explored.

- The locations of the homes of the residents are unevenly distributed across the area, with nearly half (48%) living in the vicinity of Aldeburgh. The residents and second-home owners are both essentially “established” members of the local community, with significant concentrations in each of the categories from 1 to more than 20 years.
- **The reasons expressed by main residence respondents only for living in the area reflect its physical environment attractions overall, in combination with the activities and cultural milieu offered.**
- The majority of second-home owners reside mainly in the South East (65%) or elsewhere in East Anglia (23%). In the summer months, 73% report stays of between 14-50 days, with 27% indicating stays of 50-120 days. In winter, visits appear a little shorter with 77% falling between 10-40 days and 27% from 41-80 days.

- The most frequently visited sites are Aldeburgh and Slaughden, reflecting the fact that most of the respondents lived in the area. Woodbridge and Ipswich are also included in this group, and this probably reflects frequent visits for shopping and service facilities. Snape Maltings, Thorpeness and Orford are also visited with moderately high degrees of frequency.
- **Countryside and coastal walking, along with visits to the beach are the most frequent activities undertaken by the majority of residents. This is consistent with the reasons cited by many of the respondents for deciding to live in the area. In addition, a wide range of more specific activities comprising sailing, golfing, concert going, bird watching and sightseeing are undertaken relatively frequently.**
- The **shopping patterns** of the resident respondents indicate a relatively low, but significant, level allegiance to the local shopping facilities. This is most marked for grocery shopping but the competitive position of the local retail facilities is progressively weaker for the more specialised goods, although each retains a significant minority using the local facilities. Shopping is characterised by strong elements of “out-shopping”, resulting in considerable shopping revenue “leakage” from the local area.

Questionnaire surveys were carried out of members of the Aldeburgh Yacht Club, the Slaughden Sailing Club, and the Orford Sailing Club, along with a number of visitors. and other commercial or recreational river users.

- The majority of respondents were from the Aldeburgh Yacht Club (51%), with significant numbers from Orford Sailing Club (23%) and Slaughden Sailing Club (11%). Non-member respondents accounted for 12% of the returns. The respondents were dominated by family or group memberships (72%).
- **The respondents were most likely to own a dinghy or sailboard (77%). A substantial proportion owned a yacht (keel boat) (46%), while a significant minority claimed ownership of a motor cruiser (13%). The non-member “visitor” respondents demonstrated a significantly higher rate of ownership of a motor cruiser (30%). This includes the local commercial fishing fleet and sightseeing operators.**
- The age profile of respondents is dominated by the middle age groups (40-59 years, 55%). The older groups (60 years and over) are also represented strongly (34%). Social Class 1 and 2 dominate the social profile (63%). The great majority of the “retired” category (27%) are also from the professional and semi-professional groups. Amongst the “visitor” respondents Social Classes 3, 4 and 5 are more strongly represented (26%) than the average (7%).

- The highest percentage of respondents has their homes in the Alde-Ore area (39%). A substantial 24% indicate ownership of a second home in the immediate vicinity, while 19% are home or second home owners from outside the local area.
- **The “attraction of the environment” (94%) is quoted as the main advantage of sailing in the Alde-Ore area. This is followed by the availability of “safe waters” (82%) and the associated club facilities (80%). The “variety of waters” (75%) and the “ease of sailing here” (74%) are also of considerable significance. Together, this array of factors comprises a formidable set of factors likely to promote sailing activities in an area.**
- On average respondents spent 31 days sailing in the summer months. For the winter months the average figure is 7 days. However, there are considerable variations from the average in both seasons, ranging from zero to daily.
- The most important activities were a combination of yachting (63%) and dinghy sailing (63%). Sailing in the open-sea (39%) along with participation in regattas and open meetings (38%) constitute important secondary foci. Training courses (26%) are important to a significant minority of participants. The sites visited most frequently by respondents were Aldeburgh, Slaughden, Orford town, Orford Quay, Thorpeness and Snape Maltings, in approximately descending order of frequency of visit.
- Among these respondents sailing is by far the most frequent leisure activity while shopping occupies the second position. Also amongst the most frequent pursuits are countryside and coastal walking. An equally wide range of pursuits are followed by progressively smaller but still significant minorities.

A number of overall conclusions were drawn from the study including:

It was evident from all the visitor groups, residents, second home owners and members of the Sailing Clubs that the existing “environmental attractions”, both physical and social, were fundamental to their reasons for living in or visiting the area.

Similarly, the “attractions of the environment” were equally important for the sites visited and patterns of behaviour undertaken in the area for all those interviewed.

It was also apparent that the flourishing riverine environment was important for all the activities of all the businesses interviewed, and that this largely depends upon the attractiveness, viability, safety of access and navigability of the rivers.

The overall impression from the surveys, is that this is an area, albeit delicately balanced, which is doing “quite well” and that the principal reasons for the growth, distinctiveness and current attractiveness of the area for its residents, visitors and second-home owners are indeed the distinctive characteristics of Orfordness shingle spit, its sheltered leeward sailing waters, leading to the Rivers Ore, Alde and Butley and their associated water-based settlements.

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3b: SPSS printout of questionnaire responses

(NB. This is 690 pages in length. The first pages are included as an example with the left hand column giving the Respondent Number while the other columns give the Variable responses. The entire printout is provided on disc for ease of access).

Appendix 4a: Questionnaire Yacht and Sailing Club Survey

4b: SPSS printout of questionnaire responses

(NB. This is 187 pages in length. The first pages are included as an example with the left hand column giving the Respondent Number while the other columns give the Variable responses. The entire printout is provided on disc for ease of access).

Appendix 5: Biographies of consultants