

# NEWHAVEN

## Economic and Social Impact Study

The Value of the Ferry between Newhaven (Sussex, UK)  
and Dieppe (Région Normandie, France)

**FINAL REPORT**

December 2025





Newhaven Enterprise Zone

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Specialists in Economic Development

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## 1. Introduction

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### 1.1 The Brief

During Autumn 2025, a team led by Rubicon Regeneration Limited worked with the Newhaven Enterprise Zone (NEZ) to evidence the economic and employment contributions of the Newhaven to Dieppe Ferry service, also known as “the Bridge”, to the town, the wider sub-region and the United Kingdom (UK).

The core questions that were addressed included:

- What is the net positive economic and social impact of the Bridge between Newhaven and Dieppe on an annual basis for the UK? This includes assessing the current net positive tourism and freight flows between Newhaven and Dieppe, as well as additional direct and indirect benefits that the ferry service delivers to Newhaven, Sussex and the UK.
- What would be lost if the service ceased?
- What are the top five investments/actions that need to be made on the UK side to secure the ferry service for the next 20 years and to make it thrive as a piece of strategic Sussex infrastructure?
- What is required for the 1.7 million residents of Sussex and 60,000 businesses to use the service more often?

### 1.2 Our Approach

Our approach has been informed by UK government guidance on assessing economic impacts and builds on methods and approaches that have previously been undertaken, both in relation to the ferry service and good practice in relation to economic impact assessments.

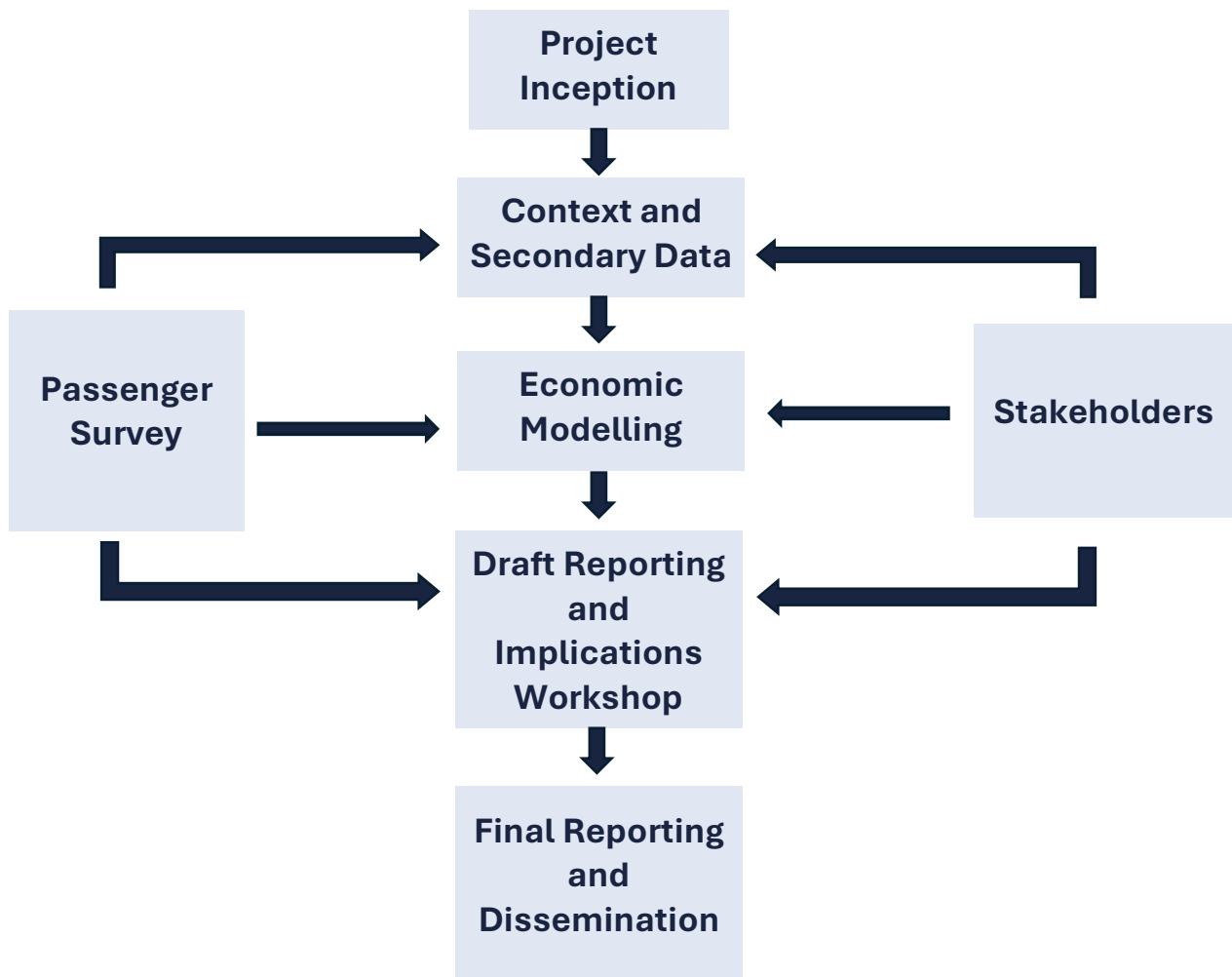
It has included:

- A survey of ferry passengers, conducted online and face to face to establish spending levels and choices in Newhaven, other parts of Sussex and the UK (Annex 1);
- Engagement with key stakeholders both in the UK and in France to understand the benefits and the future potential of the ferry service locally, within Sussex and across the UK;

- Robust economic modelling, informed by HM Treasury Green Book guidance (see Annex 2); and
- Recommendations on priority investments and actions to consolidate and grow the ferry service's position as a piece of strategic Sussex infrastructure.

Our approach is summarised in Figure 1.1.

**Figure 1.1 Approach Undertaken for this Study**



### 1.3 Report Structure

The report is structured as follows:

**Section 2** sets out the broad context for the study;

**Section 3** summarises our approach to consultation and engagement;

**Section 4** presents the approach to impact modelling and assesses the economic contributions that the ferry service provides to Newhaven, Sussex and the UK;

**Section 5** assesses the full-time equivalent (FTE) employment benefits of the ferry service

**Section 6** sets out the sensitivity tests and what the impact of increasing the number of passengers could be

**Section 7** recommends several areas for action to sustain and grow the contribution of the ferry service to the town and region; and

**Section 8** outlines concluding remarks about the study and its findings.

## 2. Background and Context

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### 2.1 Newhaven Enterprise Zone

Over the last eight years, the Newhaven Enterprise Zone (NEZ) has worked in partnership with the public, private and voluntary sectors to unlock inclusive growth and transform the town's fortunes. **Newhaven Unleashed**, the current three-year investment plan, sets out a focused, place-based approach to unlocking growth, resilience and opportunity in Newhaven based around four investment themes:

- Enabling infrastructure projects that create conditions for private sector success such as site development, transport and public realm improvements;
- Investment that focuses on innovation specifically in our growth sectors — creative, marine and advanced manufacturing;
- Supporting net-zero transition and the wider impacts of clean growth; and
- Building on the Newhaven Story<sup>1</sup> to make Newhaven one of the most investable towns along the south coast.

Since its designation, the NEZ has committed, on average, more than £1.5m each year to support a range of economic and social projects across the town. A core programme focus has been to sustain and grow the maritime sector in the town, of which the Newhaven–Dieppe ferry is the key component.

### 2.2 The Newhaven-Dieppe Ferry Service

The Newhaven-Dieppe ferry service provides the most direct route between London and Paris. It currently operates two ferries, *Côte d'Albâtre* and the *Seven Sisters*. Both can accommodate up to 600 passengers and a maximum of 200 cars or 40 commercial vehicles<sup>2</sup>. Between October and April there are two crossings per day in both directions and between May and September there are three crossings per day each way, although this can increase to four per day on some summer weekends.

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<sup>1</sup> <https://newhavenenterprisezone.com/our-story/the-newhaven-story/>

<sup>2</sup> <https://newhavenport.com/commercial/ferries/>

The ferry service has been a key feature of the Newhaven economy ever since its opening in 1825. The arrival of the railway in 1847 made the crossing more accessible and transformed Newhaven into a major international transit point, significantly boosting passenger numbers.

The Newhaven-Dieppe ferry has passed through a succession of operators over the last two centuries, reflecting the shifts in ownership, subsidy and strategic priorities (see Table 2.1).

Following the sale of Newhaven Port & Properties Ltd to SMEL de Coopération Transmanche in 2001, the Syndicat Mixte de Promotion de l'Activité Transmanche (SMPAT) was established to safeguard the ferry service. It has survived due to repeated financial interventions: first by SNCF and now by the French regional authority.

SMPAT now has five members: The Department for Seine-Maritime, the Dieppe Regional Agglomeration Community (Dieppe-Maritime), the Rouen Métropole CCI, the Falaise due Talou and the Terroir de Caux CC. The SMPAT missions are to:

**Table 2.1 Timeline of Ownership of the Newhaven-Dieppe Ferry**

Period	Operator	Note
<b>1825–1847</b>	Early private paddle steamer operators	First recorded foot passenger services across the channel
<b>1847–1984</b>	British Railways / Sealink (UK) & SNCF (France)	Joint Anglo-French operation
<b>1984–1985</b>	Sea Containers (UK)	Acquired Sealink from British Rail
<b>1985–1992</b>	SNCF (France)	Took over full responsibility: operated under Sealink Dieppe Ferries
<b>1992–1996</b>	Stena Line (UK)	Operated the route after SNCF's withdrawal
<b>1996–2001</b>	P&O Stena Line (UK)	Joint Venture eventually closed the service in 2001
<b>2001–present</b>	Transmanche Ferries (France)	Created by the Conseil de Seine-Maritime to safeguard the route. DFDS contracted to run the service from 2012

- Develop and promote cross-Channel activity between Seine-Maritime and the South of England;
- Encourage and take part in cultural, economic and other actions; and
- Initiate tourism and economic development actions directly linked to cross-Channel activity.

SMPAT owns the two ferries that traverse the 66-mile route, and it contracts DFDS Seaways to operate the service on five-year terms. The current contract runs from 2023 to 2027. The Newhaven-Dieppe ferry service is considered to be a strategically important route by the French authorities. Therefore, as part of the contract, SMPAT provides a reported annual subsidy of €25.5 million (circa £23.1 million)<sup>3</sup>, which covers the deficit that is incurred by maintaining the service throughout the year.

While DFDS employs the ferry crew, who are almost exclusively France-based, this investment provides direct land-based employment on both sides of the English Channel, including in port management and operations, bookings and security.

In 2024, both ferries benefited from a significant upgrade, funded by a £7.3 million investment by SMPAT. This included expanding the on-board retail footprint, re-designing public spaces and passenger cabins, installing a new children's play area, installing a new '40-pod hotel' for freight passengers and improving lighting, seating and USB charging points.

Alongside this, the Newhaven Ferry Terminal was also refurbished, supported by investment from the Government's Towns Fund. These investments are aimed at improving the passenger experience for people using the Newhaven-Dieppe ferry service.

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<sup>3</sup> <https://www.shipandoffshore.net/ship-repair/detail/news/dfds-completes-major-interior-upgrades-to-transmanche-ferries-two-sisterships.html>

## 2.3 UK National Passenger and Freight Trends

### 2.3.1 Short Sea Passenger Routes

Nationally, in 2024, more than 15 million passengers used the 18 major<sup>4</sup> short sea international passenger routes to and from the UK. Dover to Calais accounted for half (49.6%) of these journeys and Dover to Dunkirk a further 10.9%. Newhaven accounted for 6.8% of the remaining 6 million journeys.

Apart from the Dover routes, the only other short international sea routes that carried more passengers were Holyhead to Dublin (1,495,000), Harwich to the Hook of Holland (628,000), Portsmouth to Caen (816,000), Tyne to Ijmuiden (480,000) and Hull to Rotterdam (491,000).

The number of passengers using short sea international routes fell by a quarter (25%) between 2013 and 2024. There was already a modest decline between 2013 and 2019 (-10.2%). However, the Covid-19 pandemic affected passenger numbers hugely — there were just 5.5 million international short sea passengers in 2021, compared with 20.5 million in 2013. Since then, passenger numbers across the UK have not recovered to pre-Covid levels.

### 2.3.2 Short Sea Freight and Cargo

In 2024, 334.5 million tonnes of cargo was transported through the UK's major ports<sup>5</sup>. Most of this (69%) was goods imported to the UK and 31% was accounted for by exports. The European Union (EU) remains the largest regional partner, accounting for 53% of all international tonnage traffic between the UK and the rest of the world.

Short sea trade accounts for around 68% (225.9 million tonnes) of all international UK tonnage traffic with imports accounting of 63% of this, in tonnage terms. In 2014, around 270 million tonnes of cargo was transported on short sea routes to and from the UK. This fell to around 220 million tonnes during the Covid-19 pandemic. Imports recovered sharply after 2021. After a brief post-Covid recovery, the volume of exports fell again between 2021 and 2023, before stabilising in 2024.

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<sup>4</sup> More than 50,000 passenger journeys

<sup>5</sup> Port freight annual statistics information; Department for Transport; 2025

## 2.4 Newhaven-Dieppe Ferry Usage

### 2.4.1 Ferry Passengers

Usage of the Newhaven-Dieppe ferry service has fluctuated over time. In 1993, passenger numbers peaked at 1.2 million, after which the numbers declined, largely due to the opening of the Channel Tunnel in 1994. By 2007, around 250,000 passengers used the service, after which there was a steady recovery to 399,000 in 2015. The Covid-19 pandemic precipitated another steep decline in passenger numbers – in 2021, just 95,000 passengers were transported by the ferry service between Newhaven and Dieppe. There has been strong post-Covid recovery, with passenger numbers reaching 410,000 in 2024 — 8% above the pre-Covid (2019) levels<sup>6</sup>.

Figure 2.1 compares the number of passengers (in thousands) using the Newhaven-Dieppe ferry route, compared with other UK international short sea ferry routes in 2024. It also compares the percentage change in the number of passengers using the route between 2013 and 2024 with the other UK short sea passenger routes.

Newhaven-Dieppe is one of the UK's most successful international short sea passenger routes. Since 2013, the number of passengers using the route has increased by 133,000 (+47.9%). The only other route that has seen a significant increase in passengers is from Plymouth to Santander (+50,000 or 76%).

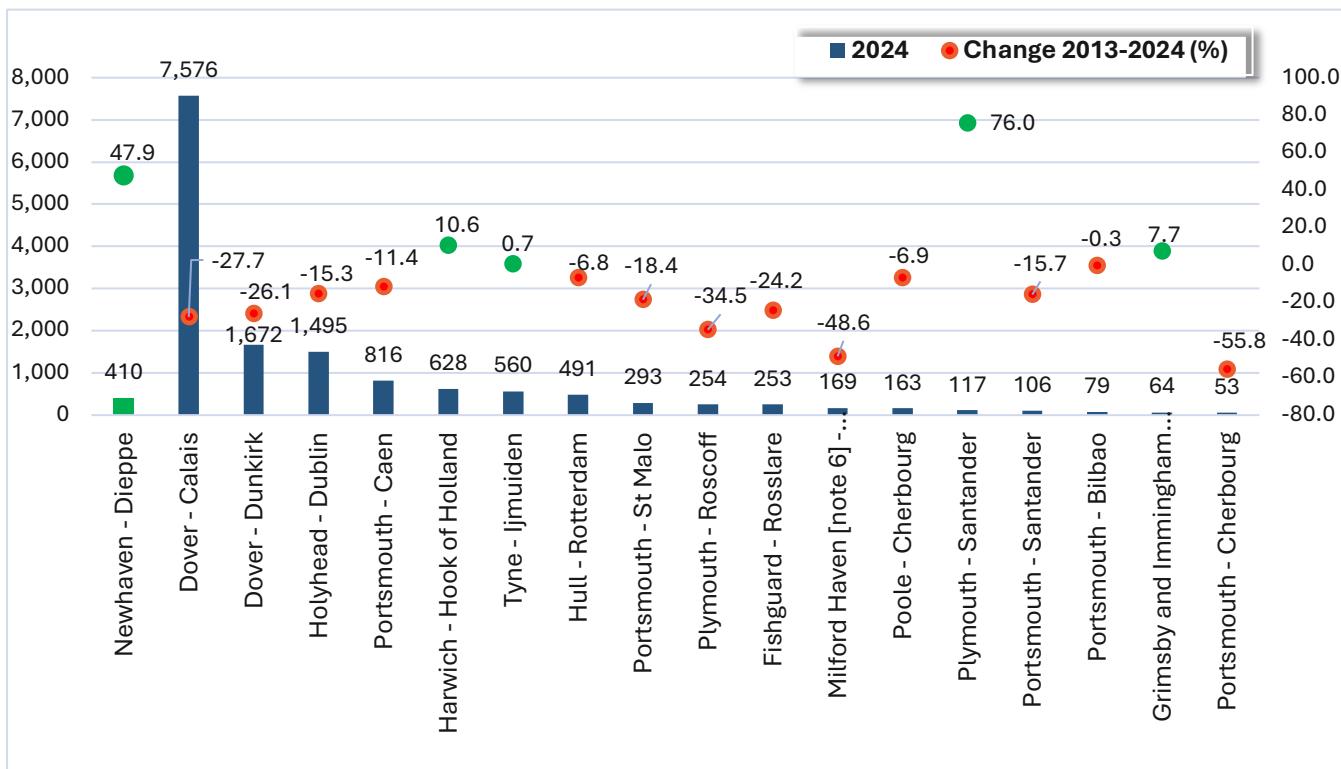
The Newhaven-Dieppe service's post-Covid recovery has been much stronger than many other routes. By 2022, the number of passengers using the route had virtually recovered to its pre-Covid levels, whilst for all the short sea routes, the numbers are more than 6.2 million (33%) lower. In 2013, the ferry service transported 83,972 passenger vehicles<sup>7</sup>, but by 2024 this had increased to 150,522 — an increase of 79%.

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<sup>6</sup> SPAS0102; UK International short sea passenger movements, by ferry route from 20023; Marine Statistics; Department for Transport; 2025

<sup>7</sup> Cars, motorcycles and accompanying trailers/caravans,

**Figure 2.1 Number of Passengers (000s) on International Short Sea Ferry Routes from the UK 2024 and Change 2013-2024<sup>89</sup>**



Source: UK international short sea passenger movements, by ferry route: from 2003; Department for Transport; 2025

However, it still operates well below capacity. The contracted minimum number of crossings is 1,690 per year in both directions. At full capacity, the service could, theoretically, accommodate 1,014,000 passengers. In 2024, just under 410,000 passengers used the service. This represents 40.4% of the total passenger capacity.

#### 2.4.2 Freight Transportation

The Newhaven-Dieppe ferry link offers several advantages for users, especially for hauliers in western and southern France, Spain and Portugal due to reduced mileage and travel time<sup>10</sup>.

<sup>8</sup> Note 1: The green dots show the routes where there has been a percentage increase in passenger numbers; the orange dots show where there has been a percentage decrease in passenger numbers.

<sup>9</sup> The Newhaven Bar is shown in green for emphasis only.

<sup>10</sup> Newhaven Port Freight Assessment; AECOM; 2022

**Table 2.2 Goods Vehicles and Cargo Tonnage between Newhaven and Dieppe 2024**

Category	Both Directions		Inbound		Outbound	
	Tonnes	Units	Tonnes	Units	Tonnes	Units
Road goods vehicles with or without accompanying trailers	281,673	21,811	210,405	14,571	71,268	7,240
Unaccompanied road goods trailers and semi-trailers	27,481	2,524	22,336	1,257	5,145	1,267

Source: UK major port freight traffic, by port and year (filter by direction and cargo type), from 2000

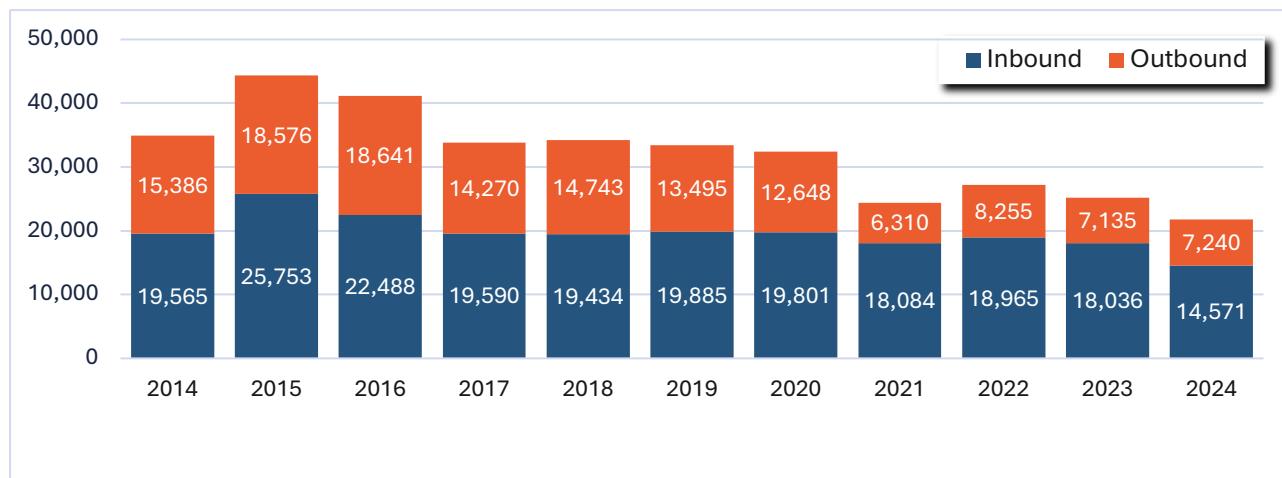
In 2024, 21,811 road goods vehicles carried 281,673 tonnes of cargo between Newhaven and Dieppe. Around two-thirds (66%) of the goods vehicles travel inbound to the UK, carrying around 75% of the cargo, in tonnage terms (see Table 2.2). This reflects the national trade imbalance highlighted earlier. Consultation evidence suggests that it is not uncommon for goods vehicles to return to France empty, whilst other travel back via other routes where (on the European sides) there are greater opportunities for picking up loads for transportation within the European Union.

The vast majority of this (14,571 goods vehicles and 210,405 tonnes) were inbound to Newhaven. In addition, 27,481 tonnes of cargo was carried on 1,907 unaccompanied trailers. Again, the majority (22,336 tonnes) was transported to Newhaven from Dieppe.

Figures 2.2 and 2.3 demonstrate that there has been a steady decline in the use of the Newhaven-Dieppe ferry service as a gateway for transporting cargo. The first chart shows the number of road goods vehicles (with or without accompanying trailers) that used the ferry service between 2014 and 2024; and the second chart shows the change in the tonnage of cargo transported on the route over the same period.

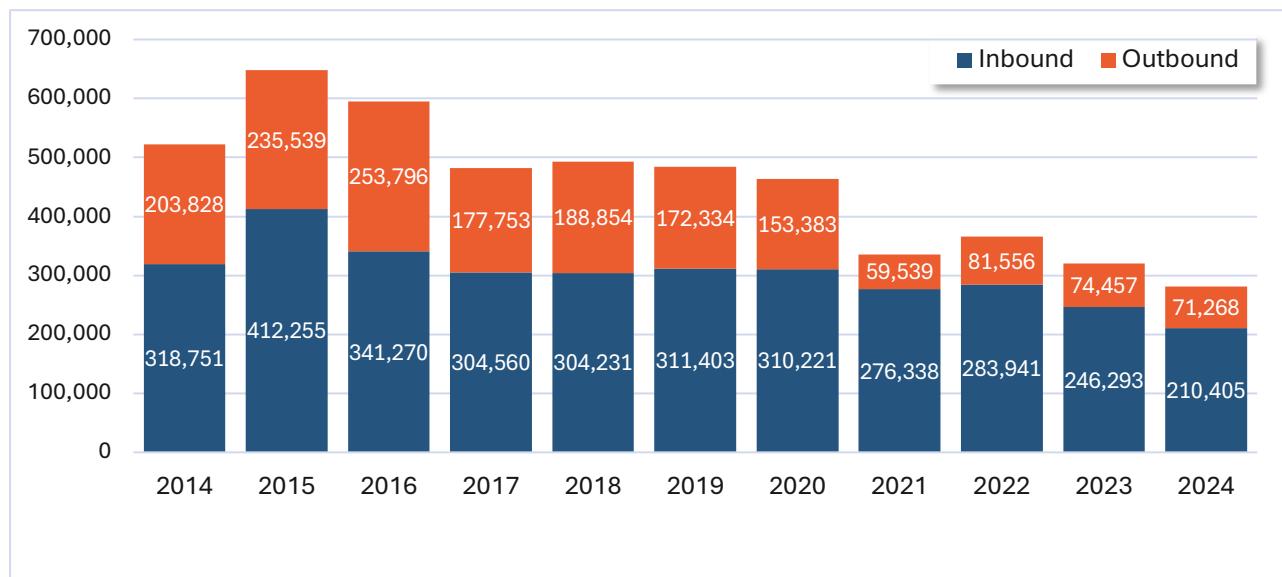
In 2014 nearly 35,000 vehicles transported cargo on the Newhaven-Dieppe ferry service, carrying over 520,000 tonnes of cargo. Around 56% of the goods vehicles and 61% of the goods that they carried was in-bound.

**Figure 2.2 Number of Road Goods Vehicles by Direction between Newhaven and Dieppe, 2014–2024**



Source: UK major port freight traffic, by port and year (filter by direction and cargo type), from 2000

**Figure 2.3 Tonnage of Goods Transported by Direction on the Newhaven-Dieppe Ferry Service, 2014–2024**



Source: UK major port freight traffic, by port and year (filter by direction and cargo type), from 2000

There was a significant increase in cargo traffic in 2015, when over 44,300 cargo vehicles transported 648,000 tonnes of goods on the Newhaven-Dieppe ferry service, but inbound traffic continued to increase as a proportion of all traffic using the service.

After a significant drop in both goods vehicles and tonnage in 2017, volumes stabilised until 2021, when they fell significantly once again. In 2021, during the Covid-19 pandemic, the overall number of goods vehicles fell to 24,400, carrying 336,000 tonnes of cargo. Inbound vehicles accounted for 74% of all vehicles and 82% of the transported goods on the route.

There has been no recovery since then. Indeed, in 2024, just under 22,000 good vehicles used the ferry service, transporting just under 282,000 tonnes of goods. This is 51% fewer goods vehicles than in 2015 and 57% less cargo in tonnage terms. Inbound freight traffic continues to be much more significant than outbound freight. While the tonnage of inbound cargo has fallen by 49% since its peak in 2015, the tonnage of outbound cargo has dropped by 72% since its peak in 2016.

## **2.5 Economic Contribution of the Ferry Service to the French Economy**

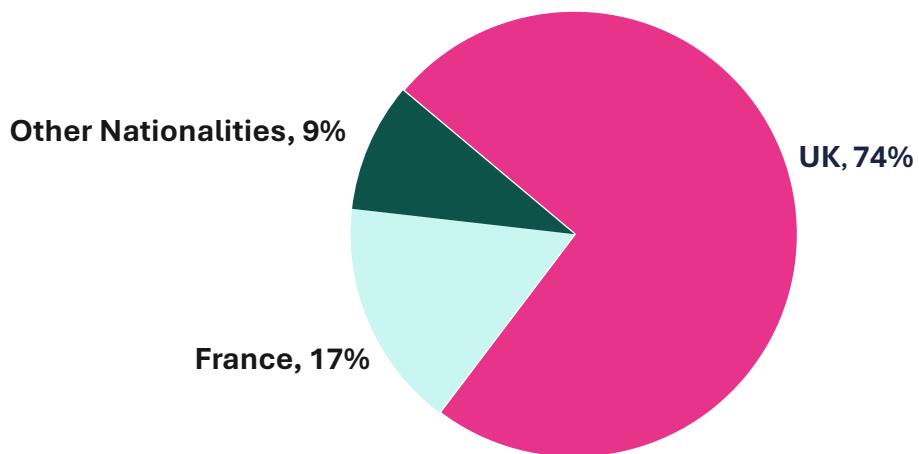
SMPAT commissioned a study in 2019 into the impact of the Newhaven-Dieppe ferry service on the French economy. This found that 74.2% of passengers were from the UK and 16.5% were from France, with the remaining 9.2% from other countries (see Figure 2.4).

Its data showed that 150,673 vehicles were transported via the ferry service, including 10,486 bikes. There were 23,290 drivers transporting goods in 26,787 units (lorries).

The report concluded that the Newhaven-Dieppe ferry service generated 3 million visitor nights between the two countries, including 2.25 million (75%) in France and 750,000 (25%) in the UK.

From this, the analysis calculated that the ferry service supported 1,306 jobs in France and 525 in the UK. The economic impact of the line to Seine-Maritime was EUR 40 million (including EUR 21.5 million for Dieppe Pays Normand); and EUR 50.9 million for Normandy).

**Figure 2.4 Ferry Passengers by Nationality 2024, by Percentage**



Source: SMPAT Transmanche Ferries (October 2025)

## 2.6 Economic Impacts of Other Ferry Services

An analysis into the post-Brexit and post-Covid Roll-on/Roll-off (Ro-Ro) ferry market undertaken in 2022 found that both had “severely impacted” the Ro-Ro freight network for moving goods between the UK and the European Union (EU) in the short term. However, the long-term impact was expected to be minimal, largely because of the sector’s adaptability. However, the report suggested that the UK Ro-Ro market was particularly vulnerable, given the high volume of EU traffic<sup>11</sup>.

There has been an impact on direct cargo transport between the European Union and Ireland, largely attributed to Brexit. This has meant that the UK is being circumvented as a land bridge between the Ireland and the EU. This is likely to be less of an issue for the Newhaven-Dieppe ferry service than for routes, such as Holyhead to Dublin.

In 2015, the Department for Transport produced nine regional case studies that focused on port connectivity<sup>12</sup>. It highlighted the “key rail corridor” between Newhaven and other destinations, including Surrey, Oxfordshire and Kent.

<sup>11</sup> An industry-level analysis of the post-Brexit and post-Covid 19 Ro-Ro ferry market and critical maritime freight transport links between the UK and the EU; Paraskevadakis D. and Ifeoluwa A.; 2022

<sup>12</sup> England’s Port Connectivity: the current picture – 9 regional case studies; Department for Transport; 2017

Most economic impact studies focus on whole port activities, rather than ferry services specifically. In 2019, a study of the economic impact of Portsmouth Port was undertaken. This concluded that the Port contributed £390 million to the UK economy and supported 5,590 jobs. This included £135m of direct Gross Value Added (GVA) and 1,420 direct jobs with a multiplier of 2.9 accounting for the remaining impacts. The local economic contribution was calculated at £189 million of GVA, including £135m of direct GVA, and a further £54m of indirect and induced GVA, with a local multiplier of 1.4. The port supported 2,410 local jobs, including 1,420 direct jobs.

Portsmouth is one of the UK's major ports. It carries 2.6 million tonnes of Ro-Ro cargo and is a major route for importing non-EU fresh produce. When the study was undertaken, it carried around 9 million passengers (nearly half of these were to and from the Isle of Wight), including 1.8 million passengers along six routes between the UK and France and Spain. Ferry routes to the Channel Islands at the time of the study carried 674,000 tonnes of cargo and 50,000 passengers.

In 2022, Maritime UK published a report Cebr<sup>13</sup>, which assessed the economic contributions of the UK ports industry. This concluded that the ports industry, as a whole, directly contributed £37.1 billion in turnover and £10.8 billion in GVA to the UK economy in 2019. The sector's overall contribution was calculated at £28.8 billion in GVA, once indirect and induced impacts were included. Overall, the sector supported 798,000 jobs, including 126,000 direct jobs. Direct turnover (£10.9 billion) and GVA (£3.1 billion) was highest in the South East (excluding London), supporting 33,000 direct jobs.

Newhaven port includes a fishing industry, the operations and maintenance base of the Rampion windfarm, the Marine Workshops building, which is used for a range of commercial and community activities, Newhaven Marina and associated leisure activity, and other aggregates, logistics and cargo businesses. These all contribute to the local economy. However, the Newhaven-Dieppe ferry service is a key part of the port's activity and the town's identity.

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<sup>13</sup> The Economic Contribution of the Ports Industry; Cebr on behalf of Maritime UK; 2022

## 2.7 The Economic Value of the Newhaven and Sussex Economies

The Newhaven economy is worth around £603 million<sup>14</sup> and has 5,775 jobs<sup>15</sup> and the Sussex economy has a value of £47.5 billion (2023 prices) and has 743,000 jobs.

“The Economic Impact of Tourism – Newhaven Town” (2024)<sup>16</sup> found that there were 569,000 tourism trips to Newhaven, including 77,000 staying trips, resulting in 396,000 visitor nights; and 492,000 day trips. Visitors spend £35.9 million in the local economy, resulting in £47.2 million of economic benefits and supporting 699 full-time equivalent jobs.

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<sup>14</sup> Table 1: Gross value added (GVA) statistics for lower layer super output areas, data zones and super output areas (2023; Office for National Statistics: 2025. Note: This includes the following LSOAs: Lewes 008A-008D and Lewes 009A-009D; uprated from 2023 prices to 2025 prices

<sup>15</sup> Business Register & Employment Survey (2024); Office for National Statistics; 2025

<sup>16</sup> Economic Impact of Tourism – Newhaven Town – 2024; Cambridge Model; Destination Research

### **3. Consultation Approach**

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#### **3.1 Primary Research**

An important element of developing the Impact Model has been to collect spend and stay data from passengers using the Newhaven to Dieppe ferry. The questionnaire was structured to identify:

- Day and time of travel
- Mode of transport
- How many days they spent in the UK, or if they were UK residents
- How many days they spent in Newhaven
- If they stayed overnight, the type of accommodation (e.g. hotel, B&B etc)
- How much they spent in Newhaven, elsewhere in Sussex and the UK
- Type of spend (e.g. accommodation, food and drink, attractions etc)
- Did they visit any other attractions in Newhaven
- The main reason for choosing the Newhaven to Dieppe ferry
- The main purpose of their trip (e.g. business, leisure etc)

The survey was uploaded to an online platform in both English and French languages. To help promote the survey, a passenger information card was designed and printed which contained a QR code for passengers to access the survey. A prize draw was included to incentivise passengers to complete the survey. With the agreement of colleagues at SMPAT, the information card was made available on all ferries during the consultation period which took place between the end of October 2025 until 30<sup>th</sup> November 2025.

To help secure passenger responses, a member of the NEZ Executive Team also used the ferry on 20<sup>th</sup> November and 21<sup>st</sup> November with a paper version of the survey seeking additional responses.

In total 69 survey responses were completed, of which 29 were online (18 English and 11 French) and 40 paper versions. The results of the survey are set out in the following sections.

### **3.2 Stakeholder Consultation**

In addition to the primary research, an extensive programme of consultation was undertaken with key partners both in the UK and with SMPAT to understand the importance of the ferry route from their perspective and to discuss ways of enhancing the contribution of the Bridge to the town and wider subregion. The results of the one-to-one consultations have played an important role in shaping future priority actions (see Section 8, Future Priorities).

## 4. The Economic Benefits

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### 4.1 Summary: Gross and Net Benefit

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**Table 4.1 Gross and Net Benefits of the Newhaven-Dieppe Ferry, by Place**

Benefit	Newhaven	Sussex
Gross Spending	£14,940,639	£42,174,526
Net Spending	£13,446,575	£31,630,894
Gross FTE Jobs	233	655
Net FTE Jobs	209	495

- The total gross economic benefit of the Newhaven-Dieppe ferry to Newhaven has been calculated at £14.94 million, supporting 233 FTE jobs.
- The ferry service's gross economic benefit to Sussex has been calculated as £42.17 million, supporting 655 gross FTE jobs.
- The net economic benefit of the Newhaven-Dieppe ferry service to Newhaven has been calculated as £13.45 million, supporting 209 FTE jobs. This is the impact that the loss of the ferry service would have on the town, if it ceased to operate.
- The ferry service's net economic benefit to Sussex has been calculated as £31.63 million, supporting 495 FTE jobs. This is the impact that the loss of the ferry service would have on Sussex, if it ceased to operate.
- The economic impact to the UK of the loss of the ferry service is likely to be much less significant, as passengers and goods will enter and leave the UK via other routes.

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## 4.2 Introduction

This section outlines the economic benefits of the Newhaven-Dieppe ferry service at Newhaven, Sussex and the UK level.

It considers:

- The methods and assumptions that have been used in developing the model, including how the passenger survey has been used to inform the calculations; and
- The passenger and non-passenger economic benefits in gross and net terms at each spatial level.

The economic and employment benefits for Newhaven, Sussex and the UK are shown in

Table 4.2.

For all the gross calculations, Newhaven is included in Sussex, and Sussex is included in the UK. Different multipliers and additioality factors have been applied to Newhaven and Sussex.

Indirect and induced benefits reflect multipliers. That is, the additional economic benefits that accrue to other parts of the economy in Newhaven, Sussex and the UK as a result of the direct spending. This includes spending by staff and businesses in the supply chain. Multipliers are

**Table 4.2 Economic and Full Time Equivalent Employment Benefit**

Gross Benefit	Net Benefit
<ul style="list-style-type: none"> <li>• Gross direct passenger spend benefit</li> <li>• Gross direct non-passenger spend benefit</li> <li>• Gross indirect and induced passenger spend benefit</li> <li>• Gross indirect and induced non-passenger spend benefit</li> <li>• Total gross benefit</li> </ul>	<ul style="list-style-type: none"> <li>• Net direct passenger spend benefit</li> <li>• Net direct non-passenger spend benefit</li> <li>• Net indirect and induced passenger spend benefit</li> <li>• Net indirect and induced non-passenger spend benefit</li> <li>• Total net benefit</li> </ul>

smaller at local level than they are at regional and national levels because there is less geographical scope for significant supply chain activity in smaller geographies (see Annex II: Applying HM Treasury Green Book guidance) — there is greater supply chain activity across the UK, as a whole, than there is in local areas.

## 4.3 Applying the Survey Responses

The tourism spend impacts are based on the passenger survey responses that were completed in November 2025. There were only 69 completed questionnaires, which is fewer than would have been desirable.

### 4.3.1 Number of Passenger Visits and Visiting Days

The survey established that the 69 respondents spent 187 days in the UK as part of their trip (see Table 4.3). This includes people travelling both to and from Newhaven. Nearly half of the respondents (32) were UK residents. They did not spend any additional days in the UK as a direct result of their trips.

On average, each trip generated 2.71 visiting days in the UK. In 2024, 409,695 passengers used the ferry service. Based on the survey findings, the ferry service generated 1,110,333 visits to or from the UK. This is more than the 2019 SMPAT study calculation (750,000).

**Table 4.3 Number of Passenger Visits and Visiting Days by Respondents**

Type of Visit	Survey	Total Annual
Survey responses	69	409,695
Days in the UK	187	1,110,333
Average days per visit	2.71	
Day visits to Newhaven	5	29,688
Staying visits to Newhaven	5	29,688
Staying nights in Newhaven	11	65,314
Staying nights per passenger	0.16	

In total, 7% of all passengers spent up to a day in Newhaven (excluding passengers who stated that they were ‘just passing through’). A further 7% stated that they were staying overnight in Newhaven as part of their trip. If these figures are applied to the overall passenger numbers, this equates to 29,688 day visitors during the year and the same number (29,688) staying visitors.

Survey respondents who stayed overnight in Newhaven, spent an average of 2.2 nights in the town on their visit, whilst an average of 0.17 staying visitor nights were spent by all survey respondents. In both cases, this equates to 65,314 nights spent in Newhaven by ferry users over the course of the year. Many of these are likely to be people staying with friends & family, although it is also worth noting that 13 of the 69 survey respondents stated that they were travelling in campervans.

For context, the “Economic Impact of Tourism – Newhaven Town” report suggests that, overall, there were 492,000 day trips to Newhaven and 77,000 staying trips to Newhaven in 2024. Based on this, 6% of all day visits and 39% of staying visits to Newhaven are linked to the ferry. The ferry service accounted for 16% of all the 392,000 staying visitor nights spent in Newhaven in 2024.

While the day trip figures may be an underestimate, given that the survey was undertaken in November, the number of staying visits seems high. However, at 16%, the number of staying nights that are attributable to the ferry service may be more reasonable.

Given these two competing factors, the central case in this assessment retains the assumptions that are based on the survey findings, although a sensitivity test (Section 6, Sensitivity Testing) has been applied to account for lower visitor spending.

#### **4.3.2 Gross Passenger Spending in Newhaven, Sussex and the UK**

Survey respondents spent or expect to spend a total of £1,380 in Newhaven, an additional £3,068 in other parts of Sussex and a further £4,021 in other parts of the UK during their trip

**Table 4.4 Gross Passenger Spending in Newhaven, Sussex and the UK**

Type of Spend	Survey	All Passengers
Overall spend in Newhaven	£1,380	£8,190,931
Spend per passenger		£19.99
Overall spend in Sussex	£4,447	£26,404,546
Spend per passenger		£64.45
Overall spend in the UK	£8,468	£50,276,702
Spend per passenger		£122.72

(see Table 4.4). This means that £1,380 was spent in Newhaven, £4,447 was spent in Sussex and £8,468 was spent in the UK by survey respondents<sup>17</sup>.

This equates to £19.99 per passenger in Newhaven, £64.45 per passenger in Sussex (including Newhaven) and £122.72 per passenger in the UK (including Sussex). According to the Economic Impact of Tourism – Newhaven Town (2024) study, visitors to Newhaven spent an average of £61.57 per trip. The figure for the ferry study is considerably lower because it includes a large number of passengers who did not visit Newhaven as part of their trip.

If these figures are applied to the 409,695 passengers who used the ferry service in 2024, the total visitor spending generated by the service is £8,190,931 in Newhaven, £26,404,546 in Sussex (including Newhaven) and £50,276,702 in the UK (including Sussex).

#### 4.3.3 Spending by Item in Newhaven

Passengers were asked about their expenditure in Newhaven, but not in the rest of Sussex or in other parts of the UK. Nearly a quarter (22.7%) was spent on transport, much of which is likely to be on vehicle fuel (which, arguably has only limited benefit to the Newhaven economy); 19.2% was spent on groceries, which is likely to be by staying visitors; 17.2% was spent on

<sup>17</sup> Note: The Sussex calculation includes spend in Newhaven and the UK calculation includes spend in Sussex.

food and drink; 12.3% was spent on both accommodation and shopping; 7.6% was spent on attractions; and 8.6% was spent on other, unstated items (see Table 4.5).

If these proportions are applied to the overall £8.19 million of passenger spending in Newhaven, £1.86 million was spent on transport; £1.57 million was spent on groceries; £1.41 million was spent on food and drink; £1.01 million was spent on both accommodation and shopping; £0.62 million was spent on attractions; and £0.71 million was spent on other items.

**Table 4.5 Spending by Item, Newhaven**

Item	Percentage of Spend	Aggregated Annual Spend
Accommodation	12.3%	£1,008,684
Food and drink	17.2%	£1,410,870
Groceries	19.2%	£1,574,963
Transport	22.7%	£1,857,297
Attractions	7.6%	£624,998
Shopping	12.3%	£1,007,879
Other	8.6%	£706,240

As the survey was undertaken outside peak season, the amount spent on attractions, in particular, is likely to be an under-estimate. The same may also apply to accommodation spend. Transport spend, in particular, is likely to remain more constant throughout the year than other items. The Economic Impact of Tourism – Newhaven Town (2024) study suggests that around one-third (32%) of spending by visitors to the town was on catering, just under one-quarter (22%) was spent on retail, 13% on attractions and 8% on transport, and a further 8% on non-trip expenditure.

The differences are likely to reflect the large number of passengers, who do not spend time in Newhaven, but who may spend on vehicle fuel (transport) and the off-season timing of the survey.

## 4.4 Non-Passenger Economic Benefit of the Ferry Service

The Newhaven-Dieppe ferry service does not just support tourism-related jobs. It is an important route for transporting cargo, particularly in-bound cargo. In 2024, the ferry service transported over 280,000 tonnes of goods in around 22,000 freight units. The majority of this was associated with goods being transported into the UK. There is significant economic activity associated with the movement of goods in Newhaven, including security checks, documentation and booking services. The passenger survey specifically excluded expenditure on ferry tickets and at the departure and arrivals areas.

Seine-Maritime invests around £23.0 million per year to maintain the ferry service. A proportion of this will directly benefit Newhaven, including through fees paid by the ferry to Newhaven Ports & Properties (NPP) Ltd and to LCT Support Services, which provides the support services to DFDS, the ferry operator. In addition, there are likely to be a small number of other jobs that are directly linked to the ferry service, but which are not linked to passenger spending. These include Border Force and logistics jobs, for example. It has not been possible to establish whether the level of these directly benefits Newhaven.

In the absence of information on the direct income from DFDS to Newhaven, the non-passenger economic benefits of the ferry service have been calculated by applying the value of the output per job for Transport & Storage at UK level in 2023 (£55,542), uprated to 2025 prices (£59,381) to the number of the 70 direct FTE jobs (see section 5, below) for each spatial area.

## 4.5 Gross Spend Benefit

This section assesses the gross benefits of the ferry service to Newhaven, Sussex (including Newhaven) and the United Kingdom (including Sussex).

### 4.5.1 Gross Direct Spend Benefit

Based on the calculations and assumptions set out above, the Newhaven-Dieppe ferry service contributes £12.35 million of gross direct benefit to Newhaven. This includes £8.19 million of gross direct passenger spend benefit and £4.16 million of gross direct non-passenger spend benefit (see Table 4.6).

**Table 4.6 Gross Direct Spend Benefit**

Type of Benefit	Newhaven	Sussex	UK
Gross Direct Passenger Spend Benefit	£8,190,931	£26,404,546	£50,276,702
Gross Direct Non-Passenger Benefit	£4,156,705	£4,156,705	£4,156,705
Total Gross Direct Benefit	£12,347,636	£30,561,250	£54,433,406

The ferry service provides £30.56 million of gross direct benefit to Sussex, including £26.40 million of gross direct passenger spend benefit and £4.16 million of gross non-passenger spend benefit.

It provides £54.43 million of gross direct benefit to the UK, including £50.28 million of gross direct passenger spend benefit and £4.16 million of gross direct non-passenger spend benefit.

#### 4.5.2 Gross Indirect and Induced Spend Benefit

For the purposes of this assessment, multipliers have been applied to Newhaven (1.21)<sup>18</sup>, Sussex (1.38)<sup>19</sup> and the UK (1.61)<sup>20</sup>.

Based on the calculations and assumptions set out in Table 4.7, the Newhaven-Dieppe ferry service contributes £2.59 million of gross indirect and induced benefits to Newhaven. This includes £1.72 million of gross indirect and induced passenger spend benefit and £0.87 million of gross indirect and induced non-passenger spend benefit.

The ferry service provides £11.61 million of gross indirect and induced benefit to Sussex, including £10.03 million of gross indirect and induced passenger spend benefit and £1.58 million of gross indirect and induced non-passenger spend benefit.

<sup>18</sup> Table 4.12 (local retail), Additionality Guide 4<sup>th</sup> Edition, Homes & Communities Agency (now Homes England); 2014

<sup>19</sup> Table 4.12 (local retail), Additionality Guide 4<sup>th</sup> Edition, Homes & Communities Agency (now Homes England); 2014

<sup>20</sup> Type 12 Multipliers – Retail; Table 2022 Input-Output Analytical Tables; Office for National Statistics; 2024

**Table 4.7 Gross Indirect and Induced Spend Benefit, by Location**

Type of Benefit	Newhaven	Sussex	UK
Multiplier	1.21	1.38	1.66
Gross indirect and induced passenger spend benefit	£1,720,096	£10,033,727	£33,182,623
Gross indirect and induced non-passenger benefit	£872,908	£1,579,548	£2,743,425
<b>Total</b>	<b>£2,593,004</b>	<b>£11,613,275</b>	<b>£35,926,048</b>

It provides £35.93 million of gross indirect and induced benefit to the UK, including £33.18 million of gross indirect and induced passenger spend benefit and £2.74 million of gross indirect and induced non-passenger spend benefit.

#### 4.5.3 Total Gross Benefit

The total gross benefit combines the gross direct and gross indirect and induced passenger and non-passenger spend benefits (see Table 4.8).

The total gross benefit of the ferry service to Newhaven is £14.94 million. This includes £9.91 million of gross passenger spend benefit and £5.03 million of gross non-passenger spend benefit.

The ferry service provides £42.17 million of gross benefit to Sussex, including £36.44 million of gross passenger spend benefit and £5.74 million of gross benefit.

**Table 4.8 Total Gross Benefit, by Location**

Type of Benefit	Newhaven	Sussex	UK
Total gross passenger spend benefit	£9,911,027	£36,438,273	£83,459,325
Total gross non-passenger spend benefit	£5,029,613	£5,736,252	£6,900,130
<b>Total</b>	<b>£14,940,639</b>	<b>£42,174,526</b>	<b>£90,359,454</b>

It provides £90.36 million of gross benefit to the UK, including £83.46 million of gross passenger spend benefit and £6.90 million of gross non-passenger spend benefit.

## 4.6 Net Spend Benefit

The net spend benefit is the amount of benefit that would be lost to Newhaven and Sussex, if the ferry service ceased to exist. It takes into account ‘deadweight’, or the extent to which passenger and non-passenger spend benefits would occur anyway, if the ferry service no longer operated.

‘Additionality’ for Newhaven is assumed to be 90%. In other words, 90% of the gross benefits from the ferry are retained within the town and would be lost in its absence. This is a ‘high’ level of additionality. For Sussex, ‘additionality’ is assumed to be 75%. Some of the benefit (25%) may still accrue to Sussex if passengers and goods were transported by other routes, but there would still be substantial losses if the service ceased to exist.

The gross benefits to the UK are assumed to be largely retained and are not dependent on the ferry service continuing to operate. UK level calculations are not, therefore, included in the tables below. Although most of the passenger and non-passenger spend benefits would be lost to Newhaven and to Sussex, passengers and goods would be transported by other routes into and out of the UK, suggesting that any spending losses at national level are likely to be modest.

### 4.6.1 Net Direct Spend Benefit

Based on the calculations and assumptions set out above, the net direct benefit of the Newhaven-Dieppe ferry service to Newhaven is £11.11 million (see Table 4.9). This includes £7.37 million of net direct passenger spending benefit and £3.74 million of net direct non-passenger spend benefit.

The net direct benefit of the ferry service to Sussex is £22.92 million, including £19.80 million of direct passenger spending benefit and £3.12 million of direct non-passenger spend benefit.

**Table 4.9 Net Direct Spend Benefit, by Location**

Type of Benefit	Newhaven	Sussex
<b>Additionality (%)</b>	<b>90</b>	<b>75</b>
Net direct passenger spend benefit	£7,371,838	£19,803,409
Net direct non-passenger spend benefit	£3,741,034	£3,117,528
<b>Total</b>	<b>£11,112,872</b>	<b>£22,920,937</b>

#### 4.6.2 Net Indirect and Induced Spend Benefit

Based on the calculations and assumptions set out above, the Newhaven-Dieppe ferry service contributes £2.33 million of net indirect and induced spend benefit to Newhaven (see Table 4.10). This includes £1.55 million of net indirect and induced passenger spend benefit and £0.79 million of indirect and induced non-passenger spend benefit.

**Table 4.10 Net Indirect and Induced Spend Benefit, by Location**

Type of Benefit	Newhaven	Sussex
<b>Multiplier</b>	<b>1.21</b>	<b>1.38</b>
Net Indirect and induced Passenger Spend Benefit	£1,548,086	£7,525,296
Net Indirect and induced Non-Passenger Economic Benefit	£785,617	£1,184,661
<b>Total</b>	<b>£2,333,703</b>	<b>£8,709,956</b>

The net indirect and induced benefit to Sussex is £8.71 million. This includes £7.53 million of net indirect and induced passenger spend benefit and £1.18 million of indirect and induced non-passenger spend benefit.

#### 4.6.3 Total Net Benefit

The total net benefit combines the net direct and net indirect and induced passenger and non-passenger spend benefits (see Table 4.11).

**Table 4.11 Total Net Benefit, by Location**

Type of Benefit	Newhaven	Sussex
Net passenger spend benefit	£8,919,924	£27,328,705
Net non-passenger economic benefit	£4,526,651	£5,162,627
<b>Total</b>	<b>£13,446,575</b>	<b>£32,491,332</b>

The Newhaven-Dieppe ferry service contributes £13.45 million of net benefit to Newhaven. This includes £8.92 million of passenger spend benefit and £4.53 million of non-passenger spend benefit.

The ferry service contributes £32.49 million of net benefit to Sussex. This includes £27.33 million of passenger spend benefit and £5.16 million of non-passenger spend benefit.

## 5. Full-Time Equivalent Employment Benefits

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Spending by ferry passengers directly creates jobs in Newhaven, Sussex and the UK.

According to the “Economic Impact of Tourism – Newhaven Town” report, it took £71,642 of visitor spend to create one direct full-time equivalent (FTE) tourism job.

The gross and net passenger spending calculations have been divided by this figure to calculate number of gross and net FTE jobs created by ferry passenger spending in Newhaven, Sussex and the UK.

The ferry service also has non-passenger related employment. This includes around 20 of the 34 jobs at Newhaven Ports & Properties Ltd (NPP). LCT Support Services, which provides the bookings, security and other services to DFDS, also directly employs 45 FTE staff, and a further 5 FTE jobs associated with the Border Force and logistics have been added to the direct jobs calculation. This results in an estimate of 70 direct jobs that are not related to tourism spending.

### 5.1 Gross FTE Employment

#### 5.1.1 Gross Direct FTE Employment

The Newhaven-Dieppe ferry service supports 184 gross direct FTE jobs Newhaven (see Table 5.1). This includes 114 direct FTE jobs as a result of passenger spending and a further 70 in other activities that are linked to the ferry service.

**Table 5.1 Gross Direct FTE Employment, by Location**

Type of Spend	Newhaven	Sussex	UK
Gross direct passenger spend – FTE jobs	114	369	702
Gross direct non-passenger spend – FTE jobs	70	70	70
<b>Total</b>	<b>184</b>	<b>439</b>	<b>772</b>

The ferry service supports 439 direct FTE jobs in Sussex (including Newhaven). This includes 369 direct FTE jobs as a result of passenger spending and a further 70 in other activities that are linked to the ferry service.

It supports 772 direct FTE jobs in the UK (including Sussex). This includes 702 direct FTE jobs as a result of passenger spending and a further 70 non-passenger spend FTE jobs that are linked to the ferry service.

### 5.1.2 Gross Indirect and Induced FTE Employment

The spending by ferry passenger also supports jobs indirectly through spending on goods and services by tourism businesses and by their employees in the wider economies of Newhaven, Sussex and the UK.

According to the “Economic Impact of Tourism – Newhaven Town” report, it takes £53,642 of indirect and induced spending to create one FTE job in the tourism supply chain. The gross and net passenger spending calculations have been divided by this figure to calculate number of gross and net FTE jobs created by ferry passenger spending in Newhaven, Sussex and the UK.

The Newhaven-Dieppe ferry service supports 48 gross indirect and induced FTE jobs Newhaven (see Table 5.2). This includes 32 indirect and induced jobs as a result of passenger spending and a further 16 as a result of other activities that are linked to the ferry service.

**Table 5.2 Gross Indirect and Induced FTE Employment, by Location**

Type of Spend	Newhaven	Sussex	UK
Gross indirect and induced passenger spend – FTE jobs	32	187	617
Gross indirect and induced non-passenger spend – FTE jobs	16	29	51
<b>Total</b>	<b>48</b>	<b>216</b>	<b>668</b>

The ferry service supports 216 gross indirect and induced FTE jobs in Sussex. This includes 187 gross indirect and induced passenger spend FTE jobs and a further 29 gross indirect and induced non-passenger spend FTE jobs.

It supports 668 gross indirect and induced FTE jobs in the UK. This includes 617 gross indirect and induced FTE jobs as a result of passenger spending and a further 51 gross indirect and induced non-passenger spend FTE jobs

### 5.1.3 Total Gross FTE Employment

Table 5.3 shows the gross FTE employment benefits to Newhaven, Sussex and the UK. This includes the direct, indirect and induced jobs created by passenger and non-passenger spending.

The Newhaven-Dieppe ferry service supports 233 gross FTE jobs Newhaven. This includes 147 as a result of passenger spending and a further 86 as a result of other activities that are linked to the ferry service.

The ferry service supports 654 gross FTE jobs in Sussex. This includes 555 gross FTE jobs as a result of passenger spending and a further 99 in other activities that are linked to the ferry service.

It supports 1,440 gross FTE jobs in the UK. This includes 1,319 indirect gross FTE jobs as a result of passenger spending and a further 121 in other activities that are linked to the ferry service.

**Table 5.3 Gross FTE Employment Benefits, by Location**

Type of Spend	Newhaven	Sussex	UK
All gross passenger spend – FTE jobs	147	555	1,319
All gross non-passenger spend – FTE jobs	86	99	121
<b>Total</b>	<b>233</b>	<b>654</b>	<b>1,440</b>

## 5.2 Net FTE Employment

The net FTE jobs adopts the same approach as in the gross FTE jobs analysis. The net benefits are divided by the turnover it takes to create one FTE job. These are the jobs that could expect to be lost to Newhaven and Sussex, if the service ceased to exist.

Net job calculations for the UK have not been included. This is because, at UK level, any job losses are likely to be modest: In the absence of the ferry service, passengers and goods are likely to continue to be transported between France and the UK, but via other routes. This means that most of the jobs that would be lost to Newhaven and Sussex are likely to be replaced by employment in other parts of the UK.

### 5.2.1 Net Direct FTE Employment

Based on this analysis, the Newhaven-Dieppe ferry service supports 166 net direct FTE jobs in Newhaven (see Table 5.4). This includes 103 net direct FTE jobs as a result of passenger spending and a further 63 in other activities that are linked to the ferry service.

It supports 329 net direct FTE jobs in Sussex. This includes 276 net direct FTE jobs as a result of passenger spending and a further 53 in other activities that are linked to the ferry service.

**Table 5.4 Net Direct FTE Employment, by Location**

Type of Spend	Newhaven	Sussex
Net direct passenger spend — FTE jobs	103	276
Net direct non-passenger spend — FTE jobs	63	53
<b>Total</b>	<b>166</b>	<b>329</b>

### 5.2.2 Net Indirect and Induced FTE Employment

The Newhaven-Dieppe ferry service supports 43 net indirect and induced FTE jobs in Newhaven (see Table 5.5). This includes 29 net indirect and induced jobs as a result of passenger spending and a further 14 as a result of other activities that are linked to the ferry service.

**Table 5.5 Net Indirect and Induced FTE Employment, by Location**

Type of Spend	Newhaven	Sussex
Net indirect and induced passenger spend – FTE jobs	29	140
Net indirect and induced non-passenger spend – FTE jobs	14	26
<b>Total</b>	<b>43</b>	<b>166</b>

The ferry service supports 166 net indirect and induced FTE jobs in Sussex. This includes 140 net indirect and induced FTE jobs as a result of passenger spending and a further 26 in other activities that are linked to the ferry service.

### 5.2.3 Total Net FTE Employment

Total net FTE employment combines the net direct, indirect and induced FTE jobs for resulting for passenger spend and non-passenger spend in Newhaven and Sussex (see Table 5.6).

The Newhaven-Dieppe ferry service supports 209 net FTE jobs Newhaven. This includes 132 as a result of passenger spending and a further 77 as a result of other activities that are linked to the ferry service.

It supports 495 net FTE jobs in Sussex. This includes 416 net FTE jobs as a result of passenger spending and a further 79 in other activities that are linked to the ferry service.

**Table 5.6 Total Net FTE Employment, by Location**

Type of Spend	Newhaven	Sussex
All net passenger spend – FTE jobs	132	416
All net non-passenger spend – FTE jobs	77	79
<b>Total</b>	<b>209</b>	<b>495</b>

## 6. Sensitivity Testing

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### 6.1 GVA and Employment

All economic appraisals are based on assumptions. They are, therefore, subject to uncertainty. It is worth comparing the gross and net calculations within the context of the wider economies of Newhaven, Sussex and the UK.

While the cargo estimates can reasonably be equated to Gross Value Added (GVA), the tourism spend estimates cannot. To convert tourism spending to GVA, we have applied the average turnover to GVA ratio for the broad passenger spending areas (0.572)<sup>21</sup>. If this is done, the gross annual GVA benefit to Newhaven of the ferry service is around £10.70 million. Newhaven's economy is worth £603 million in GVA terms (2025) prices. At Sussex level, the gross annual GVA benefit is £26.58 million, within the context of an economy that is worth around £48.2 billion. At UK level, the gross GVA benefit is £54.64 million, within the context of an economy that is worth around £2,430 billion. The net calculations are £9.63 million, £20.79 million and £13.66 million respectively.

In terms of employment, the Newhaven-Dieppe ferry service supports 233 gross FTE jobs. This is within the context of 5,725 jobs in the town. It supports 644 gross jobs in Sussex, within the context of 743,000 jobs across the area. It supports 1,440 gross jobs across the UK, within the context of 31,476,000 jobs (in Great Britain).

### 6.2 Sensitivity Test 1 – 20% Decrease in Ferry Passenger Numbers

Sensitivity Test 1 assumes that there is a 20% decrease in ferry passenger numbers. This reduces the number of passengers from 409,695 to 327,756. All the other assumptions remain the same.

Under Sensitivity Test 1, the Gross Benefit to Newhaven is £12.96 million, supporting 203 jobs and the Net Benefit is £11.66 million, supporting 183 jobs (see Table 6.1).

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<sup>21</sup> Accommodation (0.576); Food and drink (0.514); Groceries (0.584); Transport (0.461); Attractions (0.529); Shopping (0.584); and Other (0.762) – adapted from UK Input-Output Analytical Tables; Office for National Statistics; 2024

**Table 6.1 Sensitivity Test 1 — 20% Decrease in Ferry Passenger Numbers, by Location**

Category	Newhaven	Sussex
Gross benefit	£12,958,434	£34,886,871
Net benefit	£11,662,591	£27,025,591
Gross FTE jobs	203	544
Net FTE jobs	183	412

At Sussex level, the gross benefit is £34.89 million, supporting 544 jobs and the Net Benefit is £27.03 million, supporting 412 jobs.

### 6.3 Sensitivity Test 2 – 50% Reduction in Passenger Spend

Sensitivity Test 2 assumes that the number of passengers using the ferry service remains the same, but that spending per passenger is halved. The non-passenger economic benefits are unchanged.

Under Sensitivity Test 2, the gross benefit to Newhaven is £9.99 million, supporting 159 jobs and the Net Benefit is £8.99 million, supporting 143 jobs (see Table 6.2).

At Sussex level, the gross benefit is £23.96 million, supporting 377 jobs and the Net Benefit is £18.83 million, supporting 287 jobs.

**Table 6.2 Sensitivity Test 2 — 50% Reduction in Passenger Spend, by Location**

Category	Newhaven	Sussex
Gross benefit	£9,985,126	£23,955,389
Net benefit	£8,986,613	£18,826,980
Gross FTE jobs	159	377
Net FTE jobs	143	287

## 6.4 Realising Growth Potential Scenario – 20% Increase in Ferry Passenger Numbers

The realising growth potential scenario assumes that there is an increase of 20% in ferry passenger numbers. This increases the number of passengers from 409,695 to 491,634.

All the other assumptions remain the same.

Under Sensitivity Test 3, the Gross Benefit to Newhaven is £16.92 million, supporting 262 jobs and the Net Benefit is £15.23 million, supporting 236 jobs (see Table 6.3).

At Sussex level, the gross benefit is £49.46 million, supporting 766 jobs and the Net Benefit is £37.96 million, supporting 579 jobs.

**Table 6.3 Realising Growth Potential Scenario – 20% Increase in Ferry Passenger Numbers, by Location**

Category	Newhaven	Sussex
Gross benefit	£16,922,845	£49,462,180
Net benefit	£15,230,560	£37,957,073
Gross FTE jobs	262	766
Net FTE jobs	236	579

## 7. Future Priorities

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### 7.1 Consultation themes

In general, the passenger survey highlights that most people view Newhaven as a functional ferry terminal to pass through on their way to where they're travelling. A number of comments were critical of the town and its tourism offer. In response to the question, “What would make you stay in Newhaven longer?”, comments included:

- The need for motorhome / camper friendly parking;
- Good value accommodation linked to the ferry;
- Different ferry times;
- More attractive advertising about what can be done in and around Newhaven; and
- Better urban design for pedestrians and cyclists.

What is clear from the survey is a general lack of information and knowledge about what Newhaven and the surrounding area has to offer visitors. This is unsurprising given the lack of promotional material about the area within the ferry terminals (particularly Dieppe) and indeed on the ferries.

A summary of the stakeholder consultation findings is set out in 7.1.1 and 7.1.2.

#### 7.1.1 General

- The Port and ferry service is recognised as a key UK/regional ‘gateway’ to Europe; however, UK Government investment packages (such as the recent £1.1bn Maritime Commitment) risk being dominated by larger ports, leaving smaller ports such as Newhaven struggling to secure capital for upgrades.
- Positive working relationship between East Sussex and Seine-Maritime councils.
- Current length of contract between Seine-Maritime and DFDS is too short to encourage the contractor to invest in the service and to facilitate opportunities for long-term collaboration with external partners.
- The post-Brexit era was identified as having a significant impact in reduced freight flows due to added costs and increased bureaucracy. Larger ports, such as Dover and Felixstowe, have invested heavily in digital customs systems and expanded capacity, while smaller ports face under-investment.

- The port is a key part of wider UK port resilience – when freight traffic is hampered by issues in Dover / M25 / or French strikes, freight users turn to Newhaven.
- Most of the larger global companies use air cargo and the development of a second runway at Gatwick will increase air cargo capacity. This may lead to some companies switching freight operations from Newhaven.
- Anecdotally, data from local tourist information centres shows the main visitors to East Sussex are from France, Germany, the Netherlands and the USA.

### **7.1.2 Impact of Closure**

- The port and ferry are key anchors for local economic growth, supporting tourism, hospitality and retail. The impact of the ferry service ceasing would be significant to Newhaven in terms of its economy and jobs (particularly in the short term), its identity, and the perception of it as a ferry port town.
- The impact of the ferry closing would likely impact far greater on Dieppe than on Newhaven – it was indicated that more than 2,000 jobs in Dieppe are dependent on the ferry.
- The removal of options to travel would likely have negative regional and national consequences and could result in higher transport costs on retained routes.
- If the ferry was to cease, the strategy would likely involve promoting the opportunity for new housing and commercial development, but this is speculative.

### **7.1.3 Future Opportunities / Priority Interventions**

#### **Visitor economy**

- There is significant potential to ramp up the visitor offer both for UK travellers using the ferry and for overseas travellers coming to the UK. The Experience Sussex pilot project is a move in the right direction. The planned increase in weekend sailings in summer 2026 provides a further opportunity to attract more visitors.
- There is a need to improve the visitor experience at the port when leaving and boarding the ferry for all users (ie. foot passengers, cars, and so on).
- There is a need for better coordination and promotion of the route through targeted marketing.
- The investment in place making in Newhaven needs to be continued to make it a genuine destination for visitors.

- The European Year of the Normans in 2027 provides a good opportunity for cross-border promotion initiatives.
- Seine Maritime has circa 1,000 schools, but predominantly young people are sent to Brighton. Opportunities for school-age children to visit Newhaven and Sussex attractions could be developed, with itineraries tailored according to age of pupils and, their learning outcomes and curricula.

#### **Trade**

- Increase awareness of the route throughout the UK as a trade route, rather than just as a passenger route.
- Improve facilities for hauliers.
- Work with organisations, such as Sussex Chamber of Commerce, to create a physical Export Hub to support and facilitate trade (Dieppe has such a facility).

#### **Infrastructure**

- Continue investment in local infrastructure to support the port and ferry operations.
- Despite public and private investment in the port facilities, the port will need additional infrastructure investment to support the move towards electric ferries.
- Invest in facilities for motorhome / campervans users at the port (aires de camping-cars<sup>22</sup>).

## **7.2 Enhancing the Contributions of the Ferry to the Town and Sub-Region**

The Newhaven-Dieppe ferry service makes a significant contribution to the local and sub-regional economies. The ferry service and port maintain Newhaven's visibility as a maritime town. They are key components of its identity and the regeneration narrative for the town.

However, there is available capacity to increase passenger numbers, particularly outside of the summer peaks, and to make the local area more attractive to the large number of passengers who currently pass through Newhaven without spending any time within it.

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<sup>22</sup> French term for a motorhome stopover area

SMPAT is planning to increase sailings to up to four per day each way during the summer months. The sensitivity analysis (see section 6.4) shows that a 20% increase in passenger numbers could make a marked increase in gross and net benefits, particularly to the Sussex region, if some of these additional passengers' spend can be retained locally. At the Sussex level, a 20% increase in passenger numbers could increase gross benefit to £49.46 million supporting 766 jobs and the net benefit could increase to £37.96 million supporting 579 jobs.

The remainder of this section draws together the findings from the qualitative and quantitative elements of the study. It sets out realistic priorities and actions for the Newhaven Enterprise Zone and its partners to consider to secure the future of the Newhaven-Dieppe ferry service, so that it delivers maximum benefits to Newhaven and Sussex in the future.

In broad terms, the recommended priorities for interventions are structured in three areas:

- Developing the tourism potential;
- Promoting trade and investment; and
- Infrastructure improvements.

### **7.3 Developing the Tourism Potential**

The tourism sector currently contributes just over £47 million to the Newhaven economy, supporting over 940 jobs (699 full-time equivalent (FTE) jobs)<sup>23</sup>, but there is significant potential to 'ramp up' the visitor offer in Newhaven, with ferry passengers a key target market. The shift in ferry usage towards leisure emphasises the potential benefits of capturing greater economic benefits from passengers.

However, there is currently an evident lack of information about visitor attractions in Newhaven and Sussex on both sides of the crossing, and on board the two ferries. Both consultation and passenger survey evidence suggests that the overall Newhaven visitor experience needs improving.

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<sup>23</sup> Economic Impact of Tourism (2024)– Newhaven Town; Destination Research; 2025

Actions are already in place to strengthen the town's visitor economy. There are investments in Newhaven, including in the town centre, in new attractions at West Beach, improvements to Newhaven Fort and Paradise Park. The planned increase in weekend sailings in summer 2026 provides opportunities to capitalise on these investments. Education exchanges and partnerships that strengthen links between young people Newhaven and Dieppe provide further development opportunities.

A more coordinated approach to tourism is already being progressed, shaped by the Newhaven Coastal Visitor Economy Action Plan (December 2023) and delivered by Experience Sussex, through an initial two-year programme of product and partnership development, marketing and promotion.

### **7.3.1 Priority Areas for Action – Tourism**

The priority areas for action within the tourism sector are identified below.

#### **Tourism 1: Innovative marketing and promotion**

An 'early win' is to promote the town and wider offer better, using literature and collateral, blending inspiring print (brochures, maps etc) with powerful digital content, focusing on the unique experiences of Sussex and the town. Partners need to make content available in both ferry terminals (particularly in Dieppe) and on the ferry.

#### **Tourism 2: Collaborative marketing**

The new tourism partnership, Working Alliance for Voyage and Economic Synergy (WAVES), provides an important platform for joint partnership working across the French and English sides. Public and private sector partners in both Sussex and Seine Maritime should consider how best to promote the broader area. This could include developing a joint branding approach, offering diverse, bundled experiences (like multi-destination itineraries), encouraging educational exchanges, and promoting the Avenue Verte cycle route, for example.

### **Tourism 3: Short-break packages and itineraries**

There are opportunities to encourage short breaks through the development of itineraries and packages that highlight local distinctiveness (heritage and history, food, the superb natural environment of the South Downs etc) emphasising quality, variety and ease of access.

### **Tourism 4: Facilities for campervans and motorhomes**

The research indicated the high usage of the ferry by campervan and motorhome users.

Consultation evidence suggests that these are often used by older, retired people who are reluctant to drive at night.

Developing “Aires de camping-cars”<sup>24</sup> (dedicated stopover areas for campervans and motorhomes) can be a smart way for smaller towns, such as Newhaven, to attract campervans, boost local spending and manage overnight parking in a controlled and sustainable way. Further work is needed to consider location, access, safety and capacity (our suggestion is to start small, for example 5 to 15 bays and scale based on demand).

## **7.4 Trade and Investment**

Freight trade using the ferry is strategically important, but relatively modest compared with larger south coast ports. Freight usage has reduced significantly post-Covid-19 pandemic and post-Brexit. However, this is not unique to Newhaven: freight traffic through English ferry ports has seen a decline since Brexit. There is a significant trade imbalance with more goods transported into the UK via Newhaven, than out of it. Units often travel back to the European Union empty or via other routes.

Discussions with freight operators suggests that the route tends to be attractive to hauliers who travel from longer distances because the length of the sailing lends itself to statutory rest periods – goods can still be in transit during drivers’ rest periods. Furthermore, “Ro-Ro” ferries enable seamless movement of trucks and trailers, supporting just-in-time supply chains in a range of sectors, including automotive, retail and fresh produce.

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<sup>24</sup> [French term for a motorhome stopover area](#)

Decisions about which route to use are mainly made at Head Offices, rather than by drivers themselves. Despite much of the cargo being transported to locations well beyond Sussex, stakeholders believe that there is a general lack of awareness about the Newhaven-Dieppe ferry route as a crossing for cargo.

Facilities for drivers at Newhaven could be improved. Free cargo spaces were lost due to port re-configuration resulting from enhanced Border Control checks post-Brexit, and there are few rest facilities for hauliers at the port.

Despite the steady decline in the transportation of cargo, the Newhaven-Dieppe service offers growth potential. With better infrastructure and improved marketing, it could make more of the benefits of longer crossing times to hauliers. Customs Clearance agencies and Sussex Chamber of Commerce, who provide an Export Documentation Service, are likely to be key partners in developing a targeted approach to promoting the Newhaven-Dieppe ferry service as an import/export route.

#### **7.4.1 Priority Areas for Action – Trade**

The priority areas for action within the trade sector are identified below.

##### **Trade 1: Raising awareness through effective promotion**

A targeted and intelligence-led approach to highlighting the benefits of the Newhaven-Dieppe route for freight is needed. These include the location (most direct route between London and Paris), the railhead, cost, reliability and sustainability, and the benefits of longer journey times that coincide with drivers' statutory rest periods.

This is likely to need to be in partnership with organisations, such as Sussex Chamber of Commerce, Customs Clearance Agencies and local authorities, to integrate the service into regional trade strategies.

##### **Trade 2: Driver facilities and an export trading hub**

Newhaven would benefit from improvements in its facilities for drivers, particularly those who need statutory rest time either side of the crossings. On a smaller scale, this could include improved food, drink and washing facilities and electrical charging points. A more strategic

approach would be to work with Sussex Chamber of Commerce to investigate developing an export brokerage service in Newhaven itself. This could provide export readiness services, customs and documentation support, as well as joint promotional campaigns highlighting the benefits of exporting, particularly using the Newhaven-Dieppe route.

## 7.5 Infrastructure Improvements

Infrastructure for both passengers and freight in and around Newhaven could be improved. Transferring on and off the ferry is often seen as an ‘uninspiring’ experience, although wayfinding investment is planned for around the transport interchange. However, there is nowhere outside the terminal to accommodate passengers when ferries are delayed or cancelled and, as stated previously, facilities for drivers remain basic.

The European Union’s ‘Fit for 55’ package and the UK’s Renewable Transport Fuel Obligation (RTFO) include regulations that encourage (or, in some cases, mandate) ferry decarbonisation and electrification. Pressure to invest in port-side facilities to support this transition is likely to remain an on-going issue. SMPAT has ambitions to decarbonise the Newhaven-Dieppe ferries and is assessing options to achieve this in an effective and efficient way.

Cargo transportation depends on having the right logistics and warehouse facilities in the right locations, in this case close to the ferry terminal. The development of a second runway at Gatwick Airport is likely to provide additional capacity for airborne cargo to be transported directly into Sussex, potentially threatening the Newhaven-Dieppe crossing as a route for cargo transportation. Warehouse expansion could help to develop Newhaven into a key route for transporting and distributing goods in accompanied and unaccompanied units.

The “Newhaven Port Masterplan”<sup>25</sup> sets out a programme of infrastructure improvements focused on sustainability, connectivity and supporting regional economic growth. An important priority is enhanced Ro-Ro ferry facilities, including upgrades to berths and terminal operations to improve turnaround times for freight and passenger vehicles.

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<sup>25</sup> [https://newhavenport.com/wp-content/uploads/2025/05/Newhaven\\_PortMasterplan\\_August2024.pdf](https://newhavenport.com/wp-content/uploads/2025/05/Newhaven_PortMasterplan_August2024.pdf)

### **7.5.1 Priority Areas for Action — Infrastructure**

The priority areas for action in terms of infrastructure are identified below.

#### **Infrastructure 1: Warehousing and logistics hubs**

The Port is already a key partner on the NEZ Board. Future actions should also focus on expanding facilities to attract new freight users including additional facilities and services for hauliers.

#### **Infrastructure 2: Ferry decarbonisation**

Partners in Sussex need to consider how best it can support SMPAT and its operator in achieving its aspiration to cut emissions, improve air quality and align with the UK's Maritime 2050 net-zero targets.

#### **Infrastructure 3: Gateway improvements**

As part of implementing the port masterplan, investment is needed to improve wayfinding, public realm and passenger facilities to create smoother, safer and a more welcoming arrival in Newhaven for ferry passengers.

## 8. Summary

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### 8.1 Economic Impacts of the Ferry

The assessment concludes that **the gross economic benefit of the ferry service to Newhaven is £14.94 million, supporting 233 gross FTE jobs**. The sensitivity tests reduce this to between £9.9 and £12.96 million, supporting between 159 and 203 gross FTE jobs.

**At Sussex level, the gross economic benefit is £42.17 million, supporting 655 gross FTE jobs.** The sensitivity tests reduce this to between £23.96 million and £34.89 million, supporting between 377 and 544 gross FTE jobs.

**At UK level, the gross economic benefit is £90.36 million, supporting 1,440 gross FTE jobs.** The sensitivity tests reduce this to between £48.63 million and £73.67 million, supporting between 781 and 1,176 gross FTE jobs.

In the absence of the ferry service, the majority of the benefits would be retained at UK level because most of the goods and people would still be transported between France and the UK via other routes. The ‘additionality’ of the ferry service to the UK, (i.e. the benefits that are specifically dependent on the service) is therefore modest.

However, the ferry service delivers significantly greater ‘additionality’ to Newhaven and Sussex. Passengers spend in the town and in Sussex **because** the ferry service is based in Newhaven. If it were not, this spending and the jobs associated with it, would largely be lost to the local area, but probably much less so to the UK. The Newhaven-Dieppe ferry service is, therefore, relatively more important to Newhaven and Sussex than it is to the UK. The net benefits can therefore, be considered in terms of potential economic and employment losses, should the service cease.

In the main assessment, **the net economic benefit of the ferry service to Newhaven is £13.45 million, supporting 209 net FTE jobs**. The sensitivity tests reduce this to between £8.99 and £11.66 million, supporting between 143 and 183 net FTE jobs.

The **net economic benefit to Sussex is £ 31.63 million, supporting 495 net FTE jobs.** The sensitivity tests reduce this to between £18.83 million and £27.03 million, supporting between 287 and 412 net FTE jobs.

The Newhaven-Dieppe ferry service is performing well, particularly in terms of passenger numbers. However, at around 40% capacity, there is scope to increase the number of passengers using the service, particularly outside the peak season.

If passenger numbers increased by 20%, this could add an additional £2 million of gross benefit to Newhaven, supporting a further 29 gross FTE jobs; and it could add £7 million of gross benefits to the Sussex economy, supporting a further 111 gross FTE jobs.

The 2019 SMPAT study calculated that the Newhaven-Dieppe ferry service had an economic benefit of EUR 21.5 million (£19 million) to Dieppe Pays Normand; EUR 40 million (£35.2 million) to Seine-Maritime; and EUR 50.9 million (£44.8 million) to Normandie. If these amounts are converted from 2019 to into 2025 prices, the benefits would be **around £24 million to Dieppe Pays Normand; £45 million to Seine-Maritime; and £57 million to Normandie.**

While the net economic benefits of the ferry service are greater to France, the UK net benefits are still significant, particularly at sub-national level, even if the calculations in the sensitivity tests are applied.

## 8.2 Impact of the Loss of the Ferry Service

The qualitative evidence indicates that if the ferry service was to cease, the impact on the town would be significant across economic, social and strategic dimensions particularly in the short and medium term. The viability of the port would be under threat with the potential loss of other jobs at the port and in the supply chain that are not directly linked to the ferry service. Furthermore, it would strip Newhaven of much of its social and cultural identity and potentially undermine the gains that have started to accrue from recent public investment in the regeneration of the town. This would adversely impact on direct and indirect employment, regional connectivity and community identity.

The experience of Ramsgate shows how difficult it is to reinstate a ferry service following closure. The last ferry between Ramsgate and Ostend sailed in 2013 and it has been a major strategic ambition of Thanet District Council to re-opening the service. The infrastructure investment required to re-open the Ro-Ro service increased to over £14 million and the council was successful in securing over £19.8 million Levelling Up Funding for the town - reinstating the ferry service was highlighted as its key flagship project. However, the Council has been unable to secure an operator to run the service and now the Levelling Up Fund (LUF) investment has been re-directed towards other regeneration projects. The Ramsgate experience demonstrates that if the Newhaven-Dieppe ferry service was to cease, it would be costly and difficult to re-open the service in the future.

### **8.3 Positioning and Maximising the Benefits of the Ferry Service**

Newhaven Enterprise Zone and its partners need to establish where the ferry service sits in terms of strategic importance, particularly to Newhaven and to Sussex. At national level, it is one of several routes across the English channel. It is a key route in its own right, but it also provides an alternative when other, busier routes have capacity constraints or are experiencing issues that prevent passengers and freight being transported across the Channel in optimum levels.

However, the ferry service appears to be relatively more significant to the local and sub-regional economies than it is to the national economy. Successive Governments have identified Newhaven as a key focus for regeneration, recognising the challenges that it has faced over several years. This has resulted in the establishment of the NEZ and a series of investments, including through the Towns Fund, Future High Streets Fund and the LUF.

Newhaven is on the cusp of making a step change as a result of these investments, attracting new private sector investment and re-positioning itself as an attractive place to live, work and visit. The ferry service, the port and the marine and maritime sector are central to many of these investments and if it ceased to operate, it risks undermining the economic and social gains that are starting to filter through the town. Whilst the Newhaven-Dieppe ferry service directly comes under the remit of the Department for Transport (DfT), it is also a Ministry of

Housing, Communities & Local Government (MHCLG) issue, in terms of its importance to the regeneration and revival of one of the UK's coastal towns.

The action areas set out in this report range from low cost “quick wins” to longer term and more strategic actions.

The ‘quick wins’ build on the work that is being delivered by Experience Sussex, including embedding cross border collaboration with SMPAT and building a more persuasive and better marketed visitor offer for Newhaven and Sussex that complements the work that is being done in Normandy.

Strategic actions may seem more challenging to deliver, but nonetheless, are important. They are likely to involve support and investment at national government level and may include pan-Sussex approaches that to establish how best to maximise the benefit of the area’s key transport gateways

## **Annex 1: Passenger Survey**

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Newhaven Enterprise Zone (NEZ) is undertaking research to assess the economic and social value created by the Newhaven and Dieppe ferry service (also known as the ‘Bridge’) to Newhaven and the UK. The Bridge has been a key feature of the Newhaven economy ever since its opening in 1825. In 2024, over 400,000 passengers used the service and in 2019 it delivered €219 million to the French economy and supported 669 jobs in Normandy.

You are invited to complete this short questionnaire. This survey is live until 5pm on 10<sup>th</sup> November 2025.

Please note: Newhaven Enterprise Zone and Rubicon Regeneration Ltd are committed to processing information in accordance with the General Data Protection Regulation (GDPR). The data presented in this survey will be processed anonymously.

### **Q1: Day of time of crossing**

	<b>Morning</b>	<b>Afternoon</b>	<b>Evening</b>
<b>Monday – Friday</b>			
<b>Saturday</b>			
<b>Sunday</b>			

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### **Q2: Mode of travel (please select one)**

- Foot passenger**
- Car**
- Motorbike**
- Bicycle**
- Campervan**
- Coach**

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### **Q3: How many days have you/will you spend in the UK during this trip?**

- 0 (live in the UK)**

- 1**
- 2**
- 3**
- 4**
- 5**
- 6**

**7+ Please state below**

**Q4: How long have you stayed or will you stay in NEWHAVEN during your trip? (Do not include time at the terminal or waiting to board the ferry)**

- Not visiting Newhaven — just travelling through**
- Up to half a day**
- More than half a day and up to 1 day, but not staying overnight**
- Staying for 1 night**
- Staying for 2 nights**
- Staying for 3 nights**
- Staying for 4 nights**
- Staying for more than 4 nights**

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**Q5: If staying overnight, where are you staying?**

- Hotel**
- B&B/guesthouse**
- Campsite**
- Airbnb**
- With friends/family**
- Other: (please state)**
- Not applicable**

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**Q6: Approximately how much have you spent or expect to spend PER DAY in each of the following areas during your trip? (please state in GB £s). Please DO NOT include money spent on the ferry ticket and on goods and services purchased on the ferry.**

**Q6a Spend in Newhaven**

- £0**
- £1-£25**
- £26-£50**
- £51-£75**
- £76-£100**
- £101-£150**
- £151-£200**
- £201+ (please provide an estimate)**
- Not applicable**

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**Q6b: Spend Elsewhere in Sussex**

**£0**

**£1-£25**

**£26-£50**

**£51-£75**

**£76-£100**

**£101-£150**

**£151-£200**

**£201+ (please provide an estimate)**

**Not applicable**

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**Q6c: Spend Elsewhere in the UK**

**£0**

**£1-£25**

**£26-£50**

**£51-£75**

**£76-£100**

**£101-£150**

**£151-£200**

**£201+ (please provide an estimate)**

**Not applicable**

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**Q7: Please estimate how much you will spend or expect to spend PER DAY in the following categories in Newhaven only. (Please do not include spending at the ferry terminal or on the ferry)**

Category	Accommodation	Food and drink	Groceries	Transport (buses, taxis, fuel)	Attractions	Shopping (e.g. clothes, gifts etc)	Other (please state below)
£0	—	—	—	—	—	—	—
£1-£25	—	—	—	—	—	—	—
£26-£50	—	—	—	—	—	—	—
£51-£75	—	—	—	—	—	—	—
£76-£100	—	—	—	—	—	—	—
£101-£150	—	—	—	—	—	—	—
£151-£200	—	—	—	—	—	—	—
£201+ (please provide an estimate)	—	—	—	—	—	—	—
Not applicable	—	—	—	—	—	—	—

**Q8: Did you or do you plan to visit any specific attractions or venues in Newhaven?**

Yes

No

If yes, please list:

**Q9: What would make you stay in Newhaven longer?**

**Q10: What were the key reasons for booking the Newhaven – Dieppe route?**

Convenience

Price

Service

Other (please state)

**Q11: Would you consider using the ferry again?**

- Yes**
- No**
- Maybe**
- If no, why not?**

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**Q12: Country of residence:**

- France**
- UK**
- Other: please state**

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**Q13: Main purpose of your trip?**

- Leisure**
- Business**
- Other (please state): \_\_\_\_\_**

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**Q14: How many people are travelling in your group?**

- 1**
- 2**
- 3**
- 4**
- 5**
- More than 5 (please state how many)**

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**Please complete this section if you wish to be included in the prize draw**

**Name:**  
**Email Address:**  
**Contact Telephone Number:**

**Many thanks**

## Annex 2: Applying HM Treasury Green Book Guidance

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The HM Treasury Green Book is the UK Government guidance that is used for evaluating public sector investment options. It is most commonly used when assessing decisions relating to capital investment, although there is a series of supplementary guidance documents that set ways in which other factors should be considered.

The Green Book has several core principles that contribute to the robustness of economic cases for investment. These are set out below and considered in relation to the approach that has been taken to assess the economic impact of the Newhaven-Dieppe ferry service:

- **Present Value** – all costs and benefits should be shown in Present Value terms. This means that costs and benefit that accrue in later years have less value than those that accrue in early years, based on applying an annual discount rate of 3.5% from years 1-30 and 3.0% beyond 30 years.

**Application to the Study:** This has not been used in this assessment because there are no future costs or benefits. The study is not considering an appraisal of different options. It is only considering the current economic impact over a single year – 2024.

- **Price base year** - present value assessments need to ensure that all monetary values are priced at the same year. This means applying deflators<sup>26</sup> to monetary values so that they are all equalised.

**Application to the Study:** Several variables that have been used have been up-rated to 2025 prices. These are set out in the full method section below.

- **Counterfactual and alternative options** - appraisals that are intended to inform investment decisions will normally consider a range of options that include a ‘Do Nothing’ or ‘Business as Usual (BAU)’, at least one Alternative Option and a Preferred Way forward.

**Application to the Study:** The findings from study implicitly show an alternative of there being no ferry service. The impact calculations can be assumed to be the current contribution with the loss of the ferry service being the loss of those benefits. In reality, it is possible that, over time, alternative economic activity will emerge that replace the benefits of the ferry service, but there is nothing tangible currently under consideration. Other factors to consider are the additional costs that will accrue to re-establish the ferry service if it is lost. This is discussed elsewhere in this report. Furthermore, the alternative may be a ferry service that is operational only at peak times. This is not within the scope of this study.

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<sup>26</sup> GDP Deflators at Market Prices and Money GDP; Office for National Statistics; 2025

- **Spatial Factors** – where the impact occurs is a key consideration in appraisals. The interest is about whether the benefit occurs at local, regional or national level. This has a significant bearing on additionality factors (see below) that are applied to the gross figures.

**Application to the Study:** This assessment is concerned with three spatial dimensions – the contribution of the ferry service to Newhaven, Sussex and the United Kingdom.

- **Additionality** – HM Treasury is concerned with the added value that accrues from public investment, not the gross benefits. The main dimensions of additionality are:

**Deadweight** - what would have happened anyway, without the investment;

**Displacement** – how much of the benefit has been or would be displaced from elsewhere; and

**Leakage** – how much of the benefit accrues outside the intended target area;

In the absence of detailed data, various publications, including the Additionality Guide 4<sup>th</sup> Edition, provide guidance on appropriate formulae that can be applied to convert gross to net impacts.

**Application to the Study:** Deadweight and displacement have been combined for this study. We have considered what would happen to passenger spend without the Newhaven- Dieppe at Newhaven, and Sussex levels. It seems likely that, at UK level visitors and cargo entering the UK or returning from Europe could use other routes and still benefit other parts of the country if the Newhaven-Dieppe ferry service did not exist. If other routes are used, the benefits are much more likely to be lost to Newhaven and Sussex, rather than to the UK. This means that the deadweight and displacement are likely to be much lower than at national level. Leakage is not considered to be a factor, because the model is based on the passenger survey, which specifically asked where expenditure occurred.

- **Multipliers** – spending in an economy leads to additional economic activity in supply chains. Multiplier formulae depend on a range of factors, including the type of activity and the spatial area that is being considered. Small areas are likely to have smaller multiplier factors than larger ones, for the obvious reason that the scope for supply chain and other spending activity is less and the leakage of supply chain benefits is higher.

**Application to the Study:** Multipliers have been used in this study. At Newhaven level a multiplier of 1.21<sup>27</sup> has been used. At Sussex level, a multiplier of 1.38<sup>28</sup> has been used,

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<sup>27</sup> Table 4.12 (local retail), Additionality Guide 4<sup>th</sup> Edition, Homes & Communities Agency (now Homes England); 2014

<sup>28</sup> Ibid – (regional retail)

and at UK level a multiplier of 1.66<sup>29</sup> has been used. These are based on government guidance documents and spreadsheets.

- **Optimism Bias and Sensitivity Testing:** All economic appraisals are subject to uncertainty, particularly if they are based on potential future benefits. In most business cases, there is a tendency to exaggerate (or be over-optimistic) about benefits and to downplay (or under-estimate) costs of projects. This is known as Optimism Bias and it is mainly applied to capital projects. For this reason, most economic appraisals apply 'Optimism Bias' factors to costs and undertake sensitivity tests to test the assumptions made to calculate costs and benefits – that is, considering what would happen if the benefits do not accrue to the same extent as in the 'central' case, or if the costs exceed what had been forecast.

**Application to the Study:** There is no requirement to apply Optimism Bias in this study, as there is currently no proposed capital investment. However, sensitivity testing has been undertaken on the benefits. This is particularly important, as the central case is based on a small sample of ferry passengers, who were travelling off-season, whilst the non-tourism spending is based on prudent assumptions, rather than real spending on goods and services in Newhaven by key organisations that are linked to the ferry service.

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<sup>29</sup> Type 12 Multipliers – Retail; Table 2022 Input-Output Analytical Tables; Office for National Statistics; 2024

## **Annex 3: Consulted Stakeholders**

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### **Conseil Departmental de la Seine-Maritime (CDSM) / Syndicat Mixte de Promotion de l'Activité Transmanche**

François Bellouard, Managing Director  
Alain Bazille, Département de la Seine-Maritime  
Christine Moulin, Département de la Seine-Maritime

### **East Sussex County Council**

James Harris, Assistant Director, Economy  
Richard Dawson, Head of Service, Economic Development

### **Euro Channel Groupe**

Bruno Beliard, Director

### **Experience Sussex**

Jo Williams, Strategic Manager  
Kat Beer, Development Manager

### **Groupe Developpement Normandie**

Graham Precey, Chief Executive Officer and Founder

### **LCT Logistics Ltd**

Szymon Kordacz, Newhaven Port Manager

### **Lewes District Council**

Lisa Rawlinson, Head of Regeneration  
Jack Brownell, Head of Tourism

### **Newhaven Chamber of Commerce**

Mike Shorer, President

### **Newhaven Port and Properties Ltd**

Captain Dave Collins-Williams

### **Premier Inn Newhaven**

Matt Campbell, Hotel Manager

### **Tomsetts Distribution Ltd**

Andrew Tucknott, Managing Director

