Broads Authority
The Broads - a member of the National Park family

The Economic and Social Impact

of the

Broads Marine Industry

March 2008

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A Study to Determine the Economic and Social Impact of the Broads Marine Industry

1 Introduction

Purpose

1.1 The Broads Authority is working towards the preparation of its Local Development Framework (LDF) documents which will set out the planning policies for the Broads. The adjacent district councils are also working on revisions to their planning policies. One of the key requirements for the LDF documents is a complete, robust and up-to-date evidence base to underpin the strategy and policies and the adequacy of this evidence base is one of the factors that the Secretary of State will take into account when assessing the LDF documents.

1.2 One of the major development issues for the Broads Authority and which will need to be addressed in the LDF documents will be the future of waterside sites currently in economic activity eg boatyards, pubs etc and the pressures for redevelopment and/or diversification.

1.3 The initial objective is to develop a picture of the economic value of the marine based economy and its contribution to the local economy. The principle concerns for the future are the potential impacts of planning policies on:

- Communities within and beyond the Broads boundary
- Long term viability of tourism

This is set against the national policy constraints on developing in areas at risk of flooding.

1.4 Settlements relying on and indeed supporting waterside businesses are outside the Broads Authority's planning jurisdiction. The aim is to avoid unintended consequences of land use policies across the sub area.

1.5 The Broads Authority is mindful to ensure the social & economic interactions of its communities and their interdependency with the management of the Broads are incorporated into planning policy. This study has been undertaken to understand and guide the future of water side employment areas. The overall purpose is principally to identify:

- the value of the sector locally and its social & economic impact on the wider community in adjacent districts and the region as a whole.

The study also identifies the issues facing the marine industry and the needs of the industry to remain viable.

Context of the Study

1.6 This study has been undertaken in the context of a lack of up to date data. The British Marine Federation (BMF) holds much data, but tourism data is dated. The Broads Plan was published in 2004 and the Strategy for Sustainable Tourism in 2006. The following facts and figures give the starting point for the study and where possible the figures are updated through the report.

1.7 The hire boat industry is the single most important provider of holidays in the Broads, accounting for 53% of trips by staying visitors. The East of England Tourism Board undertook an assessment of the value of tourism to the Broads based on 1998 figures and found the value was around £146.6m, of which around 82% was generated by staying visitors (Broads Plan 2004).

1.8 Boat building is an industry of international significance within the Broads and the region generally. In the East of England, the BMF estimated the total revenue from the leisure marine industry was £239.4 million in 2002, of which £141m was attributed to boat building, £36.9m to equipment manufacturers and £10.9m to inland hire and charter companies (Broads Plan 2004).

1.9 British Marine Federation data of 2004/5 indicated that around 700 people were permanently employed in the marine industry on the Broads itself, increasing to around 2,000 people in the surrounding hinterland. BMF data indicated that the Broads and surrounding hinterland had a value of £83m, some 27% of the East Anglian leisure marine sector.

1.10 Broads Authority surveys showed that in 1991 boatyards employed 1,622 people, compared to 1,557 in 1981. Yet while the numbers employed had risen, the number of boatyards had declined to 105 in 1991 from 116 in 1981. These figures include all boatyard-related employment, including boat hire, repairs and maintenance and boatbuilding. There was no subsequent survey in 2001.

1.11 There had been a contraction in the hire fleet from 2,630 motor cruisers and day launches in 1980 to 1,846 in 1994 and 1,243 in 2004. The total hire boat numbers had declined from over 4,000 in the late 1970s to around 2,300 in 1999 and around 1,700 in 2004.

1.12 In recognition of the major contribution that tourism makes to the economy of the Broads, a strategy and action plan for the revival of the hire boat industry was developed under the Broads Boating Holidays Project and a strategy for sustainable tourism was agreed in 2006.

1.12 Whilst there had been a decline in the hire boat fleet, the overall number of boats on the Broads had increased since 1980, peaking at 13,573 in 1993 and subsequently fluctuating between 12,700 and 13,200. Much of the increase can be attributed to the increase in private ownership of boats, many of which are ex-hire vessels and are moored at boatyards which have diversified into marina services.

1.13 The boating industry is not confined to the Broads Authority executive area. Supporting and complementary businesses are located in local settlements and on local industrial areas. The extent of this was to be the subject of this study.

Summary

- The nature of leisure boating and the marine industry has changed
- Data was out of date
- Justification for protecting, maintaining and enhancing boatyards was required for the Local Development Framework (Planning policies).

2 Issues

The Marine Economy

2.1 The boatyard industry has been subject to major change over the past 15 – 20 years leading to the loss of a number of waterside boatyards. When a boatyard closes there are pressures for other forms of development and these may be detrimental to the Broads' character and environment and/or may have an adverse impact on the social and economic prosperity of the community. The objective in the 1997 Broads Local Plan has been to retain boatyards in boatyard use wherever possible, whilst Guiding Principle 11 of the Broads Plan states that "Economic and social development will focus on sustaining thriving rural communities through key sectors, such as tourism, marine industry … based on the distinctive features of the Broads' natural and cultural resources ..."

2.2 The boatyard economy, however, is not only dependent on the boat hire element. The increase in private boat ownership can offer an opportunity for the provision of other services, such as boatbuilding, repair and maintenance, in addition to maintaining demand for re-fuelling, pump-out and mooring facilities. This can increase the diversity and robustness of the sector.

2.3 In a wider context, the boatyards also contribute to the viability and prosperity of communities, through local spending and employment opportunities. A thriving tourism based economy brings additional customers to support riverside amenities, shops, pubs, restaurants.

2.4 Much of the infrastructure of the industry was developed in the peak periods of the 1930s and 1970s and consequently is now in need of replacement.

Flood Risk

2.5 A strategic flood risk assessment (SFRA) has been prepared for the Broads. This indicates that the majority of the Broads taking into account 100 years of climate change, is functional floodplain using the national, PPS25 definition. The SFRA notes it is generally the case that flood events are likely to involve a slow speed of approach of a flood, slow water velocities, shallow depth and low hazard. The river system is "sluggish" not "flashy". The risks presented by tidal surges are covered by the Environment Agency flood warning system.

2.6 Flood Zone 3b is defined as the functional floodplain and the development allowed is that of a water-compatible nature as set out in PPS25. This will have severe implications for the Broads as it will in effect not only restrict development that is vital to the economic sustainability of the area but may also cause planning blight. This will therefore have consequences for the Broads and the achievement of strategic objectives which include economic sustainability. Much of the economy of the Broads is water or wetland related and the decline in recreation and tourism is of concern to the Broads Authority, businesses, residents and the wider population of Norfolk and Suffolk. The strict interpretation of PPG25 in respect of the functional floodplain and water-compatible developments will not help to reverse the decline.

2.7 The SFRA reports that it may be the case that the characteristics and needs of water environments like the Broads are not adequately allowed for in PPS25 and were not specifically contemplated during its drafting.

2.8 The Inspectors Report on the Core Strategy Development Plan Document commented on flood risk management and identified the fundamental question as "the extent to which flood risk management can reconcile with the needs of the Broads to modernise, adapt and prosper when much of the area is potentially at risk of increased flooding….” It also stated that there was "…general acceptance that all parties needed to co-operate to find ways forward in an area which traditionally dealt constructively with the changing balance between land and water".

2.9 There was recognition in the Inspector's Report that new or intensification of existing housing, holiday accommodation and economic development in the flood plain, would appear to be inconsistent with the precautionary approach and related tests in PPS25. It was the view of the Inspector that this could be addressed by site specific flood risk assessments (FRAs) and the sequential and exceptions tests. While this may seem a sensible approach and one that is fully consistent with PPS25 it may not help in delivering economic sustainability as most of the Broads is in Zone 3b. The reduction and minimisation of flood risk is central to all development decisions. Use of water resilient construction will be essential in places where development can take place. The safety and security of users will also be taken into account in development and include flood warning, escape routes, evacuation plans, etc. These are all aspects which are picked up in site specific flood risk assessments.

The Broads – the UK's premier wetland

2.10 The Broads is a protected landscape in the east of England, lying predominantly in the county of Norfolk, with a small part in Suffolk. It is the UK's premier wetland, covering an area of just over 300 square kilometres. The designated protected area lies within a tight convoluted boundary that is shaped by the areas of wetland that surround a number of rivers ie the floodplain. The area is mainly a flat landscape of water, fens, marshes and woodland. It is a landscape shaped by man, characterised by the 'broads' themselves, shallow reed-fringed lakes formed from pits dug for peat in medieval times. The designated area contains a few built environments, including waterside villages and some parts of the suburbs of Norwich, Great Yarmouth and Lowestoft. The river Wensum, which flows through the city of Norwich, is part of the Broads, though the designation is confined to the river and does not include the city. A very short stretch of the North Sea coast, near Winterton-on-Sea, is in the Broads.

2.11 In 1988 the Broads Authority was established as a member of the UK national park family under the Norfolk and Suffolk Broads Act. Two of the purposes of designation, and duties of the Broads Authority, are similar to those of other national parks in the UK, i.e. conserving and enhancing natural beauty and promoting enjoyment by the public. However a third purpose and duty is protecting the interests of navigation. Under the Broads Act, no one of these three purposes takes precedence.

2.12 The Broads Authority is the local planning authority for the designated area, with responsibilities for planning, conservation, development control and enforcement. It is also the navigation authority, with responsibilities for public safety provision for navigation and boats and maintenance of the navigation, including moorings, dredging and signing.

Summary

- The Broads is a protected landscape within which is a network of navigable waterways.
- The Broads is a wetland, much of which is functional floodplain; already floods and where flood risk will increase over a 100 year scenario.
- The marine industry is a key part of Broads life.

3 The Study

Methodology

3.1 The Authority has been working with the British Marine Federation (BMF) and the Broads Hire Boat Federation (BHBF) for many years seeking to ensure the economic and environmental sustainability of the Broads business base. The organisations have mutually compatible aims.

British Marine Federation

3.2 The British leisure marine industry is a distinct group of over four thousand firms and sole traders that provide specialised products and services to marine leisure users across the world. These include: new leisure craft, secondhand boats, engines, insurance, finance, mooring, berthing and storage, boatyard service and repair, chandlery, waterways holidays, sailing holidays, boating equipment, marine electronics, deck hardware, clothing, safety equipment, sailing schools, corporate events, watersports kit etc. Leisure marine is separate from commercial marine or maritime industries such as oil & gas, shipbuilding, port development, the cruise industry, port management, ship repair etc. BMF is predominantly leisure orientated but many members are also involved in commercial areas. For example British builders of small commercial workboats are strongly represented within BMF.

3.3 Every year the BMF carries out a survey of its members, which is combined with an assessment of non-members to produce a report on marine industry revenue and employment. They have carried out an analysis of their 2006/7 data specifically for this study and have produced a Broads wide picture of employment and turnover. Their data is drawn from 95 companies which is from 49 members in the Broads and 54 non-members. providing a complete picture of the marine industry. They now have a 92 -95% response rate from members and all non-members are taken from a list of the marine industry provided by Experian. The data was extracted for businesses with postcodes which covered the Broads. BMF members cover all sectors of the industry and the data therefore includes businesses whose primary purpose is moorings (and others such as business services and other companies not in BHBF or yellow pages and will also include businesses located away from the water's edge.

3.4 The BMF also shared their findings of "Economic Benefits of the UK Leisure Boating Industry 2006" and their coastal marinas report, "Economic Benefits of Coastal Marinas in the UK and Channel Islands 2007". The Federation is undertaking a project on the economic benefits of inland marinas during 2008, which will include the Broads.

Survey of Broads Marine Businesses 2008

3.5 In March 2008 the Broads Authority, with support from the Broads Hire Boat Federation (BHBF), undertook a survey of 70 Broads–based marine businesses. These were identified through marine classifications in Yellow pages and by the BHBF distributing surveys to its members. The survey aimed to collate more detailed local information than was available from the BMF national reports and to identify local economic and social impacts. Survey forms and an explanatory letter were distributed by post. A surveyor then undertook the survey by telephone to raise the response rate. The response rate following the telephone interviews was 72%. The survey form is appended.

3.6 The discrepancy between the number of businesses accounted for in the BMF and Broads surveys is due to different sources being used and the BMF membership covers a broader marine industy sector base than was defined in the Broads study.

Broads Authority Marine Business Survey 2008

Questionnaires sent:	
BHBF members	31
Other marine businesses	39
Returned by Royal mail: Address unknown	2
Completed questionnaires	49
Response rate	72%
Late response (not included)	1

Case Studies

3.7 More in-depth studies have been undertaken by Consultants Risk and Policy Analysts Limited of two businesses and one geographic concentration of businesses. These businesses depend intrinsically on their water-side location. They demonstrate how businesses have had to be flexible and adapt to changing demands in the past and have diversified across the marine and tourism industry. Implications are drawn on the continuing need for businesses to modernise and be consumer responsive, especially in the leisure market.

Funding

3.8 This report provides evidence for local planning authorities when drawing up planning policies and also raises awareness by the industry itself of their significance. In addition to funding by the Broads Authority and the industry, European funding was received from the Broads and Rivers LEADER+ scheme in recognition of the shared concerns that more needed to be understood about the relationship between the marine industry, the protection and enjoyment of the Broads and the vitality of the adjacent communities.

Summary

- The methodology employed to compile this report has resulted in an indepth understanding of economic impacts of boatyards.
- Consideration could be given to surveying the remaining 28 marina/moorings businesses to identify their contribution to the economy.
- The BMF are to include the Broads in their national study of marinas - this (BA) study will be a useful source for the desk research on the context of the Broads businesses before the BMF undertake the economic assessment in more specific detail for inland marinas ie the operation of marinas, the revenue from associated businesses, from tenants and from the wider tourism related spend and broader implications.
- BA is to consider contributing to additional surveys in the BMF study.

4 The UK Marine Economy

4.1 The leisure marine industry makes an important contribution to the national economy and one that has shown a consistent rise over the last few years. Research from the British Marine Federation[1] indicates the national turnover for the sector has been rising steadily at > 6% a year over the last 10 years[2].

BMF's headline figures for 2006/07 are:

- Total turnover of the UK leisure and small commercial marine industry is £2.952 billion - an increase of 6.5% from 2005/6
- Value added contribution, the principal measure of national economic benefit, is £1.053 billion (35.7% of turnover) – value comparable to 2005/6
- International trade revenue is £1.035 billion – an uplift in value of 12.7% from 2005/6. This revenue now represents 35.1% of total turnover.
- There are around 35,680 employees across the industry (Full Time Equivalent) – an increase of 1.9% from 2005/6
- In the UK, there are around 4,300 businesses in the UK leisure & small commercial marine market

4.2 In the East of England, turnover is £363.6m which is 12.3% of the UK total. The value added by this turnover is estimated at £129.7m.

4.3 The BMF has estimated the structure and size for both members and non-members in the leisure and small commercial marine industry in the UK to comprise a majority of companies with 5 or less employees (73.2%) who provide 20.9% of employees and 16.2% of all revenue. There are 70 companies with over 50 employees and these account for 37.2% of all employees and 43.5% of the total industry revenue. This means that employees in the larger companies are more productive in terms of revenue earned.

BMF Analysis of size of Company			
Size of company UK (No Employees)	% Total Companies	% Total Employment	% Total Revenue
1 - 5	73.2	20.9	16.2
Over 50	1.6	37.2	43.5
Totals	**4,297**	**35,682**	**£2,952m**

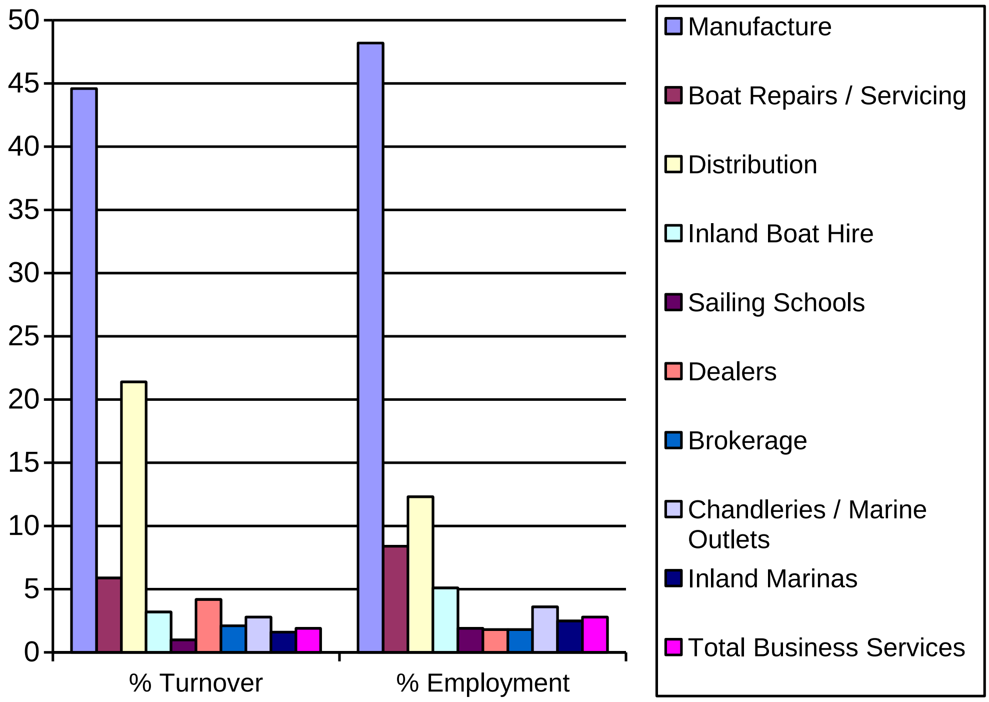
4.4 Looking at the industry revenue by sector, the BMF identified some trends are emerging when comparing year-on-year. Total revenue for boat manufacture and distribution has increased by 12% from last year, engines / systems by 3% and equipment by 6%. Services as a whole are at the same size in revenue as last year, with a slight increase in business services.

4.5 BMF data is just for marine sectors and therefore does not cover some of the business sectors found on boatyards such as angling retail, pub/cafe or self catering as this is all part of the tourism related spend.

[1] British Marine Federation - UK Leisure and Small Commercial Marine Industry, Key Performance Indicators 2006/7

[2] British Marine Federation – Industry Bulletins 2003,2003/4,2004/2005, UK Leisure and Small Commercial Marine Industry Key Performance Indicators 2005/6

UK Businesses	% Turnover	% Employment
Manufacture (boats, engines, equipment)	44.6	48.2
Boat Repairs / Servicing	5.9	8.4
Distribution (boats, engines, equipment)	21.4	12.3
Inland Boat Hire	3.2	5.1
Sailing Schools	1.0	1.9
Dealers	4.2	1.8
Brokerage	2.1	1.8
Chandleries	2.8	3.6
Inland Marinas	1.6	2.5
Other consumer services, including coastal marinas / charter**	12.9	11.6
Business Services	1.9	2.8
Source: BMF 2006/07 **excluded from Figure below		



4.5 In BMF's Economic Benefits of the UK Leisure Boating Industry report 2006, Gross Value Added of this industry was calculated using three economic measures (expenditure, output and income) to produce an overall estimated of the total. BMF has published detailed data by business sector.

BMF Industry Assessment of Value Added in the UK 2003/4 revenue			
Sector	Gross sales/turnover £m	Value added £m	Ratio
Manufacture	944	340	0.36
Marinas, moorings & Boatyard services	193	113	0.58
Hire businesses & training	105	73	0.69

4.6 BMF identifies the large manufacturing base of the industry and its strong export performance. In addition to industry revenue, the report details how the industry supports, generates and encourages participation in leisure boating activity and therefore has an important role to play in the tourism economy. This tourism related spend is estimated to generate up to a further £2.2 billion in the UK, of which £137 million in the East of England. This supports employment to the local economy of up to 3,900 jobs in the East.

Summary

- The manufacturing base of the industry is large and its export performance is strong.
- The industry supports, generates and encourages participation in leisure boating activity and therefore has an important role to play in the tourism economy.
- The value added appears to be more favourable in the hire business and marina sector than in manufacturing.

5 Contribution of the Leisure Marine Industry to the Economy of the Broads

Structure of Broads Marine Businesses

5.1 BMF estimate that Broads businesses employed some 1130 [3] Full Time Equivalent people in the marine industry locally and as would be expected they form an important part of the local economy. As with many aspects of the Broads, the relationship with immediately surrounding hinterland bears examination, and in this respect the Broads economy cannot be viewed in isolation. The companies were calculated as representing some 17% of the East Anglia region turnover and some 25% of the regional employment in the leisure marine sector. As a major tourist destination for boating the Broads area is a strong contributor to the national revenue for the "inland hire and charter" sector within the industry. Boatbuilding and equipment manufacture also figure prominently.

Size of Company

5.2 The industry is diverse in terms of the scale of companies that operate within the sector but there are a large number of small and single employee companies and this is reflected in the 2001 census which records that 16% of the resident population of the Broads Authority executive area are self-employed.

5.3 Broads marine businesses are small – medium scale. The businesses responding to this key question (48 out of 49) accounted for the direct employment of 670 people. The 42 small businesses employ 39% and the 6 medium sized businesses employ 61%. The table below can be compared to the table for the national structure.

	Size of business	Number of businesses	% Businesses	Employees	% Employees
Small	1	2		2	
	2 to 5	21	48	76	11.6
	6 to 10	14		105	
	11 to 25	5		78	
Medium	26 to 50	2		74	
	51 to 100	3		201	
	101 to 250	1	8	134	50.0
Total		48		670	
Source: BA survey 2008					

5.4 The nature of businesses is an important factor to the economy of an area. The boating industry is made up of small entrepreneurial businesses that are locally owned and managed. It is therefore more likely that a high proportion of the income generated will stay within the local area.

[3] British Marine Federation – unpublished data on the Broads and surrounding area

Business Sectors[4]

5.5 The majority of businesses surveyed in the Broads 2008 survey are multifunctional. Nearly all are involved in the leisure industry in some form.

Marine business only	Leisure marine uses only	Mixed uses	Total Number of Businesses
3	2	44	49

5.6 The four companies employing over 50 people were all involved in manufacturing – either boats or marine equipment. Three were mixed marine/leisure sites, one concentrated on the marine business. The two companies solely involved in leisure marine uses were single interest specialist companies – in contrast to the other companies.

BMF DATA FOR THE BROADS (members and non-members) 2006/07		
		%
Total Turnover	**£63,559,966**	
Manufacture		
Boat Manufacture	£19,980,205	31.44%
Boat services / repairs	£5,872,795	9.24%
Engine / Equipment Manufacture	£1,601,020	2.52%
Retail and brokerage		
Boat Distribution / Broker / Dealers	£6,241,513	9.82%
Engine / Equipment Distribution	£5,193,851	8.17%
Chandlery	£789,041	1.24%
Inland hire / Sea schools	£19,061,721	29.99%
Marinas & Moorings	£4,394,638	6.91%
Other	£268,880	0.42%
Estimated Value added contribution (national average)	**£25,163,391**	**39.59%**
Number of companies 95	Full time equivalent employees 1,133	

5.7 The figure below showing the percentage of turnover of Broads businesses by sector can be compared to the figure showing the participation in the sectors by Broads businesses from the 2008 survey. Boat manufacture/repair together with the Boat Hiring sector are important in terms of turnover and level of participation across the businesses. Boat manufacture/repair appears to be more significant in economic terms than in proportion to its activity level. Considering that marinas and moorings were under represented in the BA survey, they have a low value in the total turnover.

[4] Classifications of BA survey categories of activities

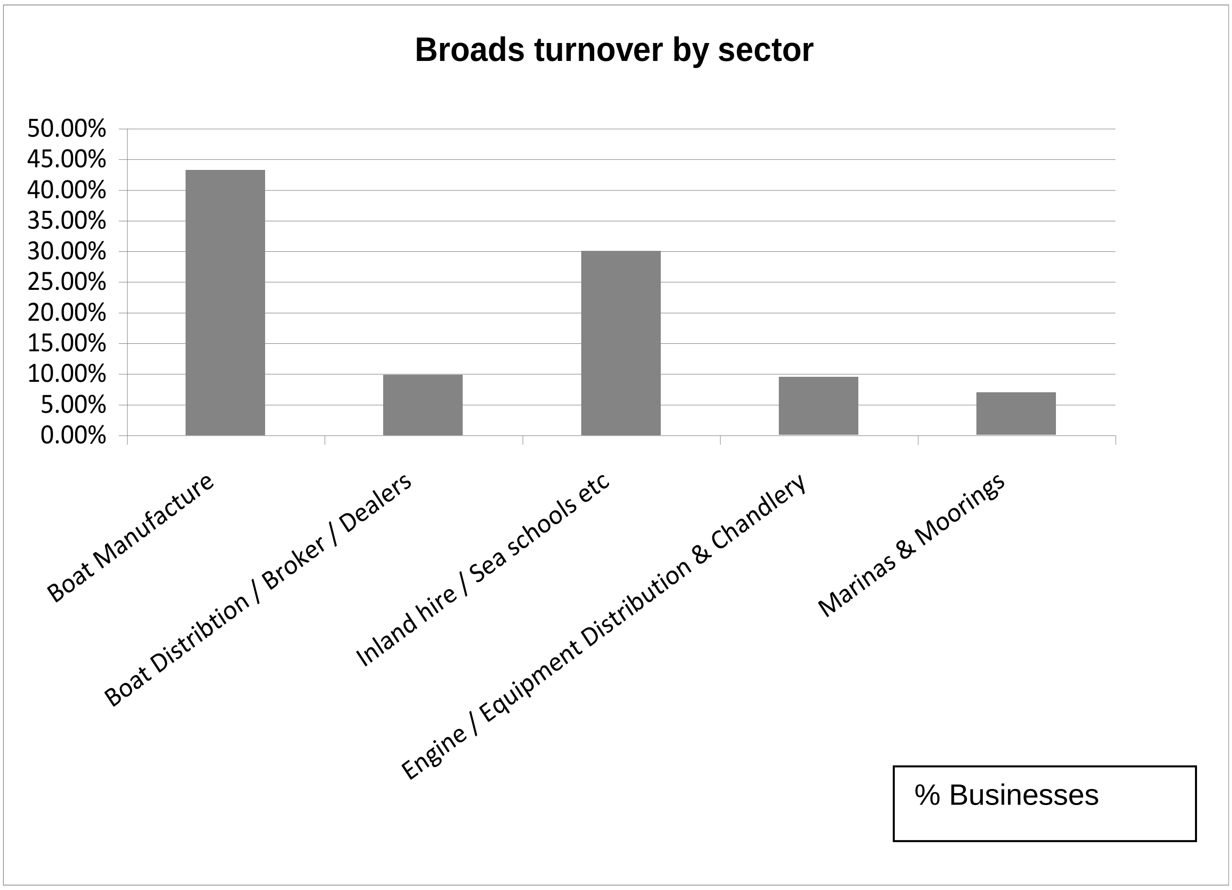
Manufacture: Boat building, Boat design, Fitting out of hulls, Marine equipment manufacture, Boat Repair and maintenance.

Distribution: Marine equipment supply, Wholesale marine equipment.

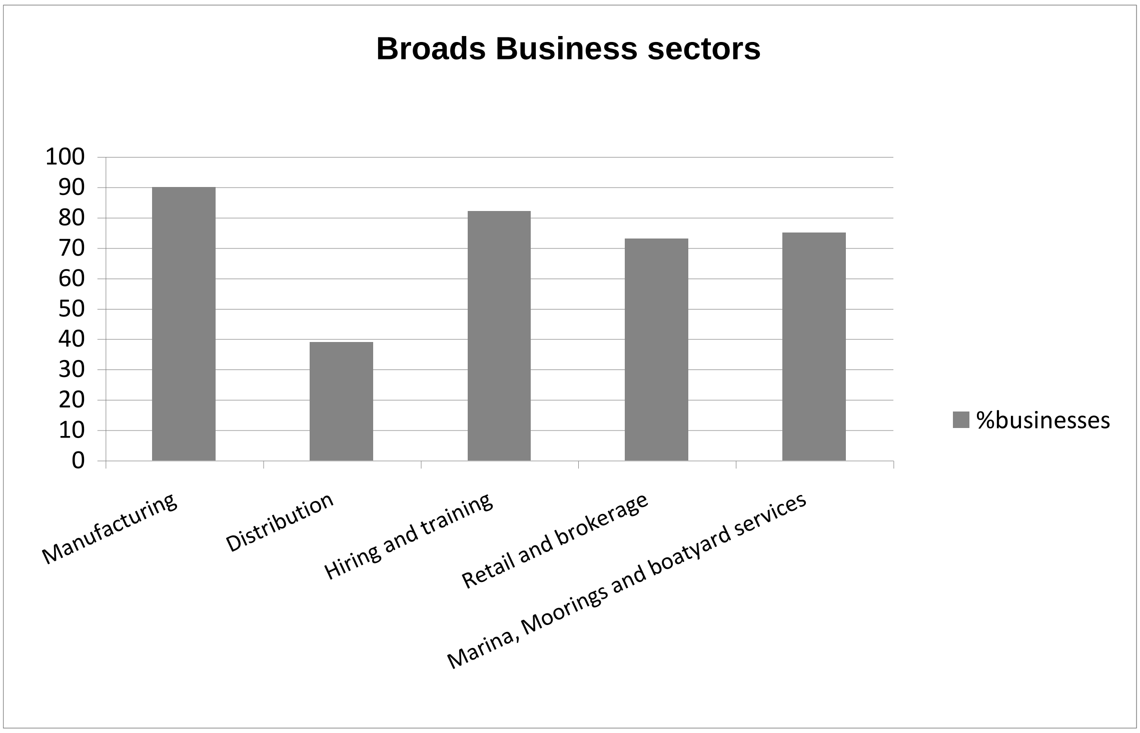
Charter/ Hiring and Training: Boat Hiring, Pleasure boat services, holiday chalets.

Retail and brokerage:, Sales of new boats, Sales of second hand boats, Chandlery sales, Angling retail, General retail, Pub/ cafe/ restaurant.

Marina, Moorings and boatyard services:, Winter private boat storage, Facilities for “do-it-yourself” maintenance of private boats, Permanent moorings for private leisure craft,

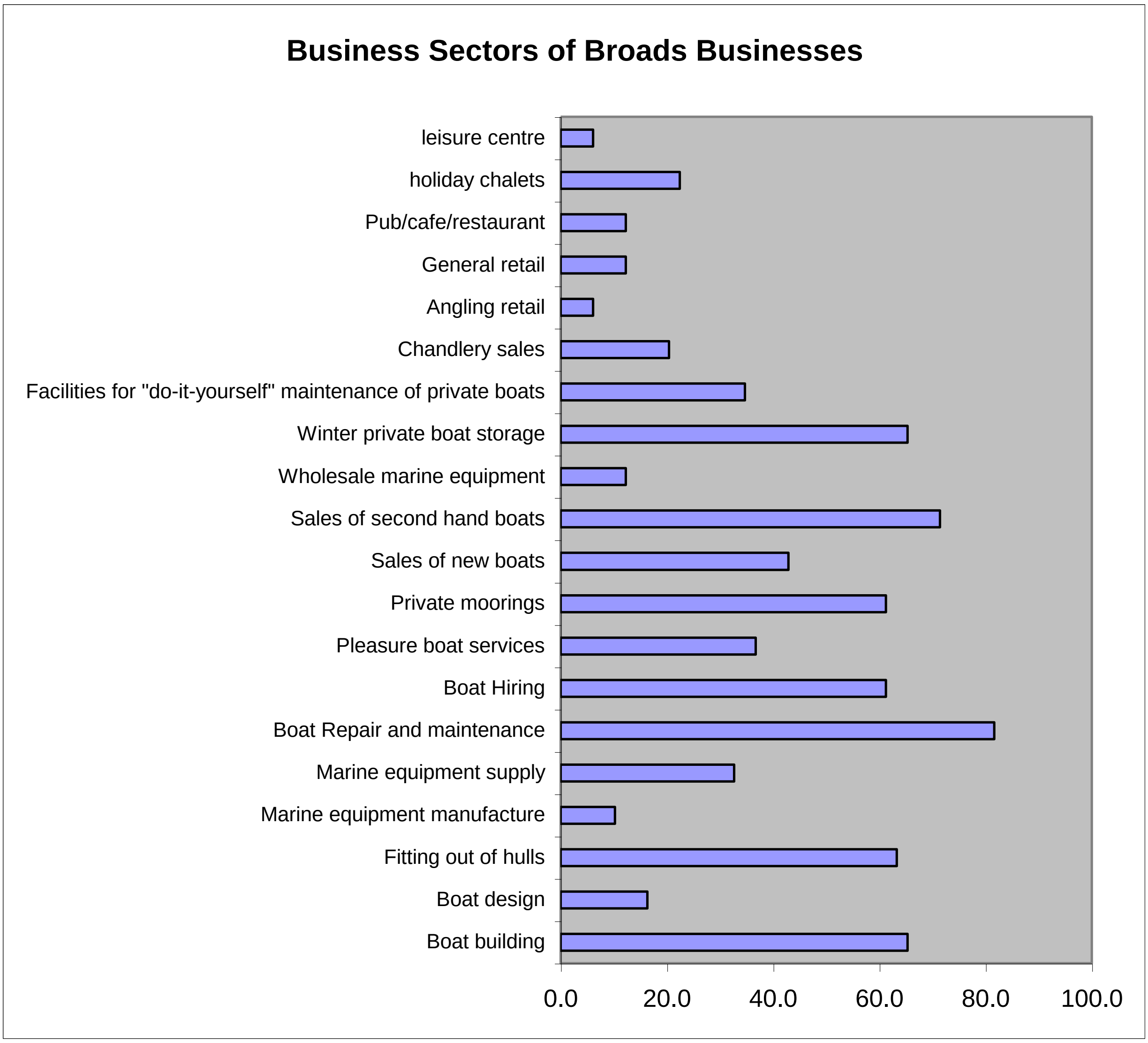


Source: BMF 2006/7 turnover data % businesses



Source: BA survey 2008 % of businesses doing each activity

5.8 In terms of value-added, the BMF identifies a total contribution of over £25m by applying the national average rate. The high percentage of turnover in the hire boat sector in the Broads combined with the high ratio of value added by this sector nationally reaffirms the importance of this sector to the local economy. Although the manufacturing sector does not have such a high ratio of turnover to value added, its significance in financial terms results in a strong contribution to the “value added” economy.



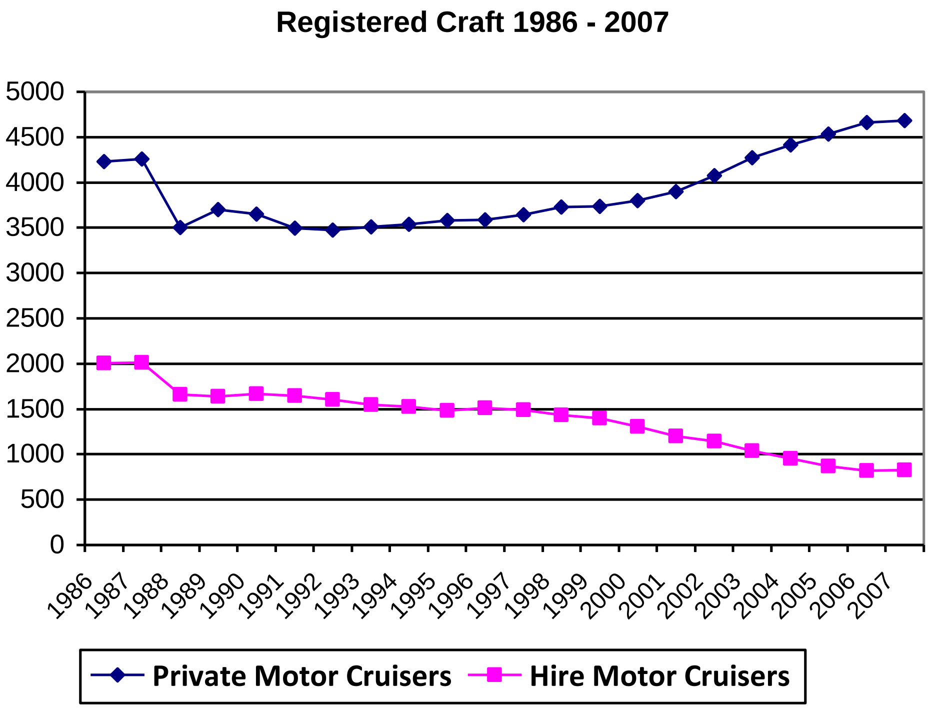
Source: BA survey 2008 Number of businesses doing each activity

<u>Boats on the Broads</u>

5.9 A total of 12,637 licences were issued by BA to enable boats to use the navigable waterways in the Broads in 2007. Boats will not necessarily be moored in the water, or even on land within the Broads and may use other waterways.

5.10 There are 829 licensed motor cruising boats for hire on the Broads (2007), a significant decline on the 2208 boats at the heyday of the hire fleet in 1981. The number of hire boats stabilised in 2007 after declining at an average rate of 5% per annum over the last 20 years, accelerating to a decline of 10% per annum over the 2 years 2005/2006, with the loss of several thousand bedspaces. This decline is likely to reflect a number of factors, including changing patterns of holidaytaking, market profile changes, quality and cost issues and competition from other destinations including overseas. More boats are based in the northern Broads than in the southern area.

5.11 By contrast the number of motor cruisers has steadily increased year on year to 4,685 in 2007. It is important to remember that they can also contribute to the visitor economy as well as the marine economy.



<u>Size of Boatyard</u>

Moorings within Boatyards			
Total mooring capacity of your boatyard	Permanent moorings for private leisure craft	Permanent moorings for private residential craft	Visitor moorings
1911	1231	34	348
Source: BA survey 2008			

5.12 There is a total mooring capacity of 1911 average berths on the boatyards represented in the 2008 survey. Those used for the hire fleets are traditionally available for visiting hire boats when vacated. In addition, since the decline of hiring and boats being sold into the private sector, some moorings are being safeguarded for *visitor moorings* for any visiting boats so that all boats can move around the system. ((Free 24 hour moorings are provided by the Broads Authority at a number of locations. Private moorings are offered by boatyards, landowners and riverside enterprises such as pubs.) Businesses involved in marine and brokerage sectors have their *operational moorings*. There are 18 boatyards with no private leisure moorings, utilising their own moorings. The survey revealed 34 moorings being used for *residential* craft. These were spread over 6 yards. One of which had 10 moorings and another 12. They are found on mixed use sites alongside boat building, brokerage, private moorings and/or hire fleets.

The marina, moorings and boatyard services sector

5.13 There are 33 businesses with permanent *moorings for private leisure* craft and they are all involved in other business sectors.

Marina, moorings and Boatyard services businesses: other sectors of their businesses	
Manufacturing (incl boat building , repair, maintenance)	30
Mixed marina & tourism uses (catering, boat hire, holiday accom, DIY maintenance)	29
Retail and brokerage	26
Boat Hiring	20
Static holiday accommodation	11
Total No Businesses	33
Source: BA survey 2008	

5.14 The local industry is polarised between a majority of small boatyards and a few large boatyards. Over 1200 private moorings were represented in the survey on 33 boatyards. Thirty seven percent of the capacity is spread over 27 sites and 63% is provided on just 6 sites.

5.15 The companies with hire boats require moorings for their own use. In general, the other companies let out their moorings and retain few if any.

Permanent moorings for private leisure craft	Number Boatyards with private moorings	Number private moorings
0	14	0
1-10	10	64
11-20	10	162
21-30	3	77
31-40	3	106
41-50	1	50
51-60		
61-70		
71-80		
81-90		
91-100		
101-110	2	215
111-120	2	235
121-130	1	122
0ver 131	1	200
Total with private moorings	33	1231
No response	2	
Source: BA survey 2008		

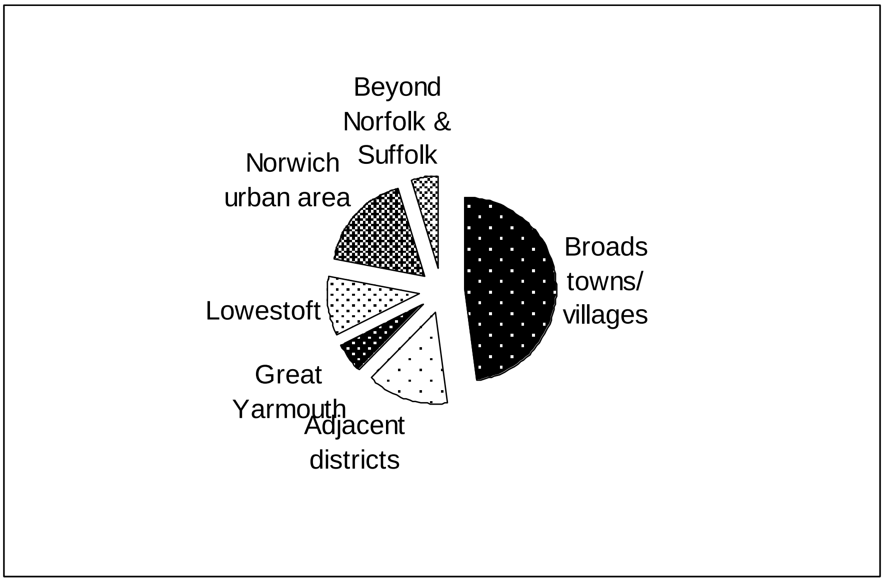
Economic and Social Impacts of the Marine industry

Where employees live

5.16 Nearly half the employees live in villages and towns which are immediately adjacent to the Broads boundary. A further third commute from the three urban areas.

5.17 It will be important for the continuation of the Broads economy that housing supply, community facilities and quality of life be maintained in the surrounding towns and villages. The businesses are employing a large proportion from the urban area and there is a need to ensure their travel to work is facilitated otherwise they may be attracted by alternative employment opportunities which are more easily available. Conversely, the supply of appropriate housing in more local market towns and villages might reduce distance travelled to work.

5.18 It is also important that companies are able to expand and relocate, if necessary, within a short distance of their current site due to the pool of local specialist labour. Their skills could easily be deployed in other more general industries.



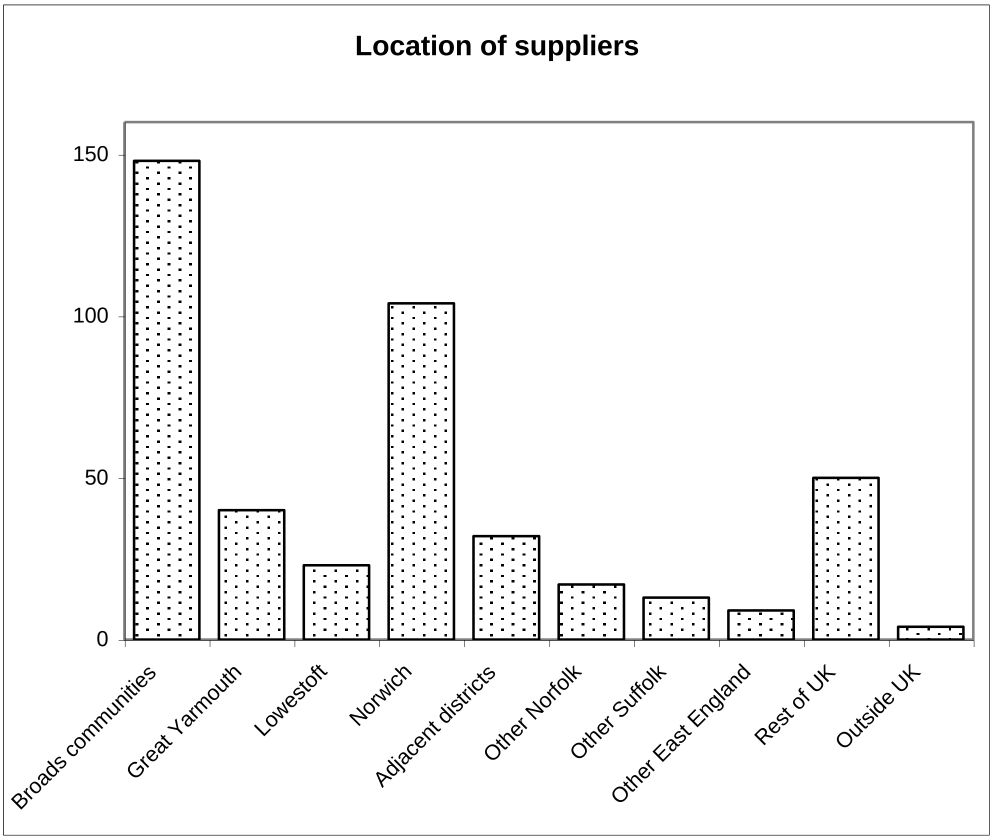
Residence	No Employees	%
Broads waterside towns/ villages	321	48
Elsewhere in adjacent districts	95	14
Great Yarmouth	37	5
Lowestoft	70	10
Norwich urban area	115	17
Beyond Norfolk & Suffolk	32	5
Total	**670**	
Source: BA survey 2008		

Suppliers

5.19 The Broads Marine Industry survey looked at Broads businesses' interaction with other businesses. The survey did not ask detailed questions about this interaction, but sought to show the geographic influence on further jobs and further expenditure beyond the waterside. This is the direct interaction of the business activities themselves. Tourism impact studies would identify the further jobs and expenditure created by those visiting the Broads for marine based activities. These might range from short visits to purchase a boat for use elsewhere through to boating holidays.

5.20 There were 48 companies who responded to this question. There is a strong local network of companies trading with each other in the case of materials, components and fuel. There is also a strong local business network based on the supply of professional business support services.

5.21 Care should be taken in interpreting the data which shows the number of interactions, not the number of supply companies. For example, 6 marine businesses could be using 6 different banks in Acle (there are actually 2) or all 6 businesses might be using one bank. However, when visiting the bank, it is possible the newsagent is also visited and perhaps lunch might be purchased. By helping to keep the bank in business, the other residents and businesses in Acle benefit. The employees of the bank(s) will in turn generate expenditure in Acle on their daily needs.



5.22 This information can therefore show where other businesses are benefiting from Broads businesses directly; and where the wider community is benefitting from the trade. The following communities are the most well used: Norwich, Wroxham / Hoveton, Great Yarmouth, Lowestoft, Acle, Brundall, Beccles, Stalham, North Walsham, Loddon, Oulton Broad and Wymondham.

Interactions with Suppliers	a	b	c	d	e	f	g	h	I	j	k	l	m	n	o	p	Total
Broads communities																	
Acle / Upton	6	3			1	4					1		1		1	3	20
Beccles	3	1	2		2	2			2	1			1			1	15
Blofield					2					1							3
Brundall	1						2		6	3	4					2	18
Bungay			2														2
Coltishall								1									1
Horning										1							1
Loddon	2	1	1		1	2											7
Martham														2			2
Oulton Broad		1							2	1	1			1		1	7
Potter Heigham				1			1										2
Reedham															1		1
Rockland St Mary		1															1
Salhouse		2															2
Somerleyton														1			1
Stalham	4		2	1	2				3			1		2			15
Wroxham / Hoveton	14	3	7	1				1	17	1	3					3	50
Sub total	**30**	**12**	**14**	**3**	**8**	**8**	**3**	**2**	**30**	**8**	**9**	**1**	**2**	**6**	**2**	**10**	**148**
Great Yarmouth	4	8	2		2	2	1	1	11		2	2	1	1	1	2	40
Lowestoft	4	3	3	3	1				2		2	2		3			23
Norwich	5	12	15	19	9	7	1	1	12		3	5		12	2	1	104
Sub total	**13**	**23**	**20**	**22**	**12**	**9**	**2**	**2**	**25**	**0**	**7**	**9**	**1**	**16**	**3**	**3**	**167**
Source: BA survey 2008																	

code	
Bank	A
Accountant	B
Solicitor	C
Insurance agent	D
Computing	E

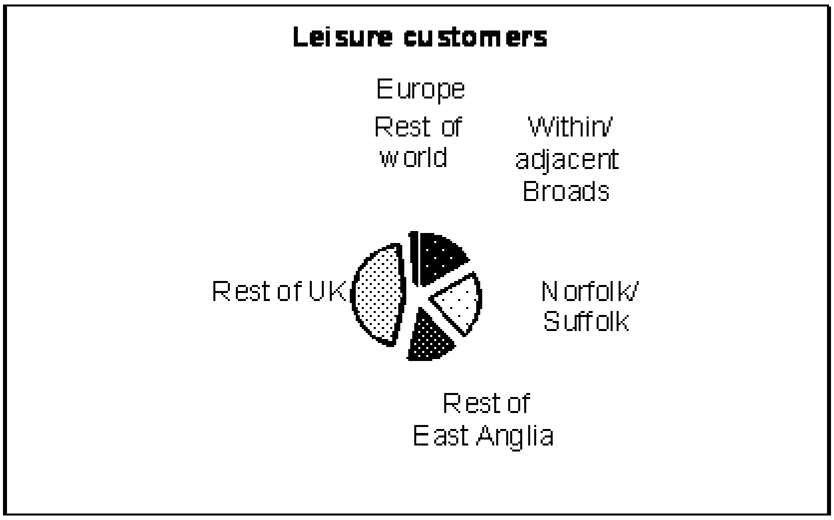
Printers	F
Cleaning (if external)	G
Other professional services	H
Materials/components	I
Boats/hulls	J

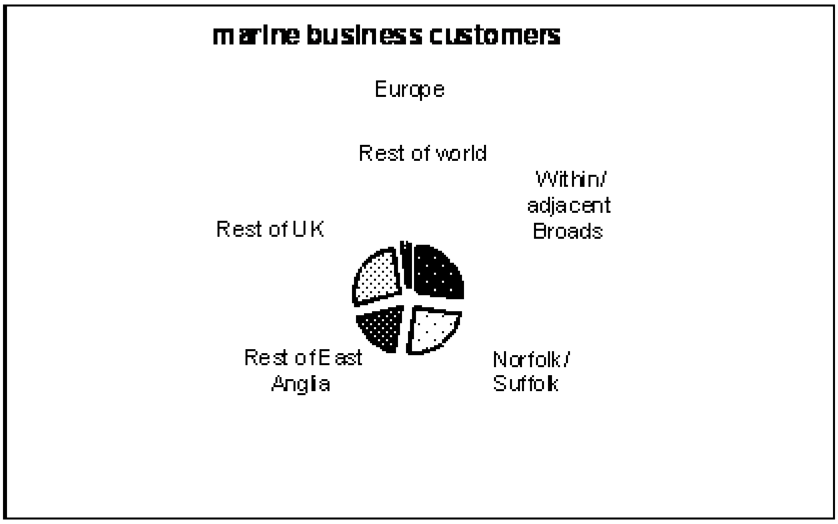
Equipment/machinery	K
Catering supplies	L
Builders/construction	M
Fuel	N
Transport	O
Other key suppliers	P

Customers

5.23 Businesses were asked to give an indication of where their customers come from. They were not required to carry out an in-depth analysis of their books. There were 46 responses to this question. This gives a geographical sphere of influence. It is not an economic evaluation.

5.24 In contrast to the businesses own sourcing of goods and services which tended to be local to the Broads, the customers of Broads goods and services come from further away. "Leisure" customers, whilst well represented in the local market are strongly represented in the UK beyond East Anglia. Customers of the marine manufacturing/repair side of the businesses are more focused within East Anglia and also have a customer base in the rest of the UK. A small proportion of customers come from beyond the UK





Summary

- The retention of the larger companies is critical to the employment of local people.
- The local structure is characterised by the large number of small businesses.
- The structure of the local industry is based on multifunctional businesses that have been able to diversify, offer wider services and spread their risks.
- The extent to which private boats are sub let for holidays and their pattern of use overall is unknown.
- Hire boats move away from their base for a week at a time for 20-24 weeks, spreading visitor spend over a wide area.
- Private boats generate moorings fees, boat repair/maintenance costs and some chandlery sales but have reduced contribution to the rest of the retail sector and servicing and upkeep of the boat supplied by the hire companies weekly.
- Boatyards without hire fleets require few moorings for their business use.
- Boatyards with hire fleets have spare capacity in the season for visitors moorings and the majority do allow this.
- A local supply of housing is required by employees.
- Businesses need the ability to rebuild or expand locally to retain specialist skills.
- There is a strong local network of companies trading with each other.
- Indirect economic benefits are felt across the local district council areas.
- Marine businesses are concentrated in the northern Broads, therefore the northern villages and towns benefit from most of the trading activity.
- Broads businesses exert an influence beyond the local area, well into the region as a whole and the rest of the UK beyond.
- Businesses are selling into the East Anglian marine supply chain.
- Businesses are selling products into the leisure market, boosting participation in water sports in the region.

6 Future of the marine businesses

Location

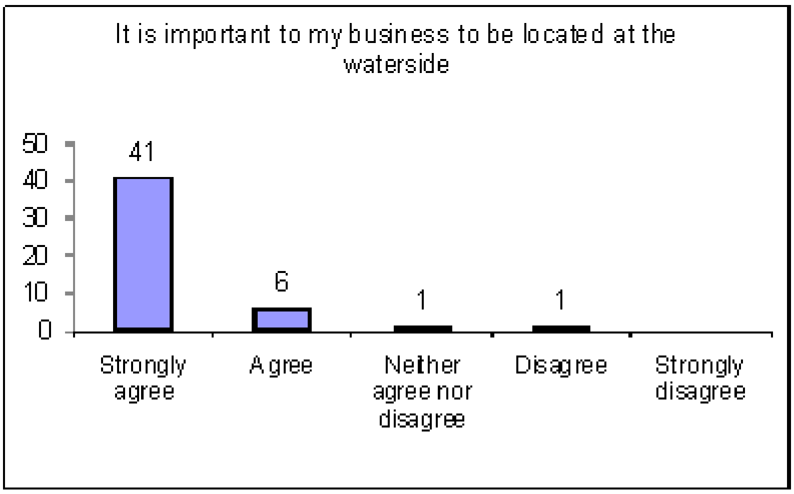
6.1 It is no surprise that nearly all the businesses surveyed in the 2008 survey think it is important to be located at the waterside. It was interesting to see that the businesses have a strong affinity to their location in the Broads. It is therefore important to maintain boatyards sites in employment use.

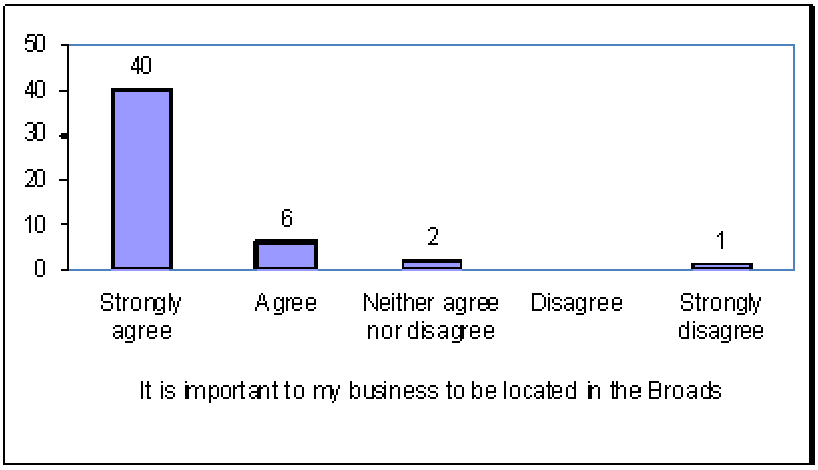
Aspirations

6.2 Eighteen boatyards expressed some future aspirations for their site. These included expansion of moorings/marina (3), more holiday accommodation (4), general rebuilding/modernising, being able to respond to changing demands in boat building, expansion of the boat building/repair facilities (9). One would invest in their hire fleet and another was more negative about that side of the business. One respondent thought their site had no future due to oversupply of boatyards and a lack of customer demand.

6.3 The case studies allowed greater insight to the way sites are developed. There is a distinct contrast between the northern and the southern sites. The northern site benefits from its urban location with a mix of facilities and services within a short distance. It maintains a viable hire fleet. The southern site is isolated and suffers from a general reduction of visiting hire and private craft and so has had to become more self-sufficient in its offer. The concentration of small businesses, mostly single purpose, with its small hire fleets replaced by private moorings could be viewed as a “co-operative” in that a wide variety of marine and retail services are available albeit provided by a multitude of small businesses. All case studies illustrate the need to respond to the changing leisure market and to invest in their physical structures on the land, whether for boat repairs maintenance or to offer a higher quality leisure experience (accommodation, services, retail). The importance of the economic chain is illustrated and, indeed, what happens when it is broken.

6.4 The case studies illustrate the North/South divide in the structure of marine businesses. In the north, complementary businesses support each other and there is a critical mass. The southern business has become isolated with the general decline and now finds it has to have a mix of supporting services and facilities on site. It is a vital link in the chain of facilities through the waterways as it has no near competitors and boaters do not have such a wide choice of suppliers. The network of boatyards has safety implications for boaters apart from the business opportunities.





- The companies rely on their waterside location in order to carry out their diversified businesses.

- Single focused businesses are able to relocate away from the waterfront and become suppliers to the rest of the industry eg window manufacturers, (non-Broads) boat builders.

- Where there is an internal market between boat owners and the manufacturing/supply sector there is greater optimism.

- The loss of operational boat yards in the southern Broads, not even able to supply private moorings, means that remaining operators are more reliant on land based business and this in turn reduces the market for marine services.

- Customers demand higher quality facilities, businesses need to reinvest to retain custom.

- The "value added"/indirect economic benefit of the marine industry is higher where a site can provide a variety of services on site or in close proximity.

- Larger companies on larger sites have been more responsive to the decline in the hire boat fleet than small operators and have been able to maintain direct and indirect economic benefits.

- Small operators have consolidated their business activities to provide space for moorings.

7 Conclusions

7.1 The Broads is a wetland already characterised by fluctuating water levels due to tidal, fluvial and geological influences. In addition, the Broads is designated a protected landscape and a network of navigable waterways. It is within this context that the leisure marine industry has flourished and maintains an important economic and social presence today.

7.2 The majority of the executive boundary is functional floodplain. Flood risk management must become integral to and explicit in the operational management of waterside sites. Businesses must therefore consider how the nature of the waterside landscape and character of rivers will change over time.

7.3 There has been a decline/potential stabilisation of number of hire boats and an increased private boat ownership. This has maintained a customer base, in fact one that serves local residents for recreational boating rather than long stay visitors from outside the region as in the past. The recreational opportunities will be attractive to future residents of greater Norwich and this should eventually be a potential growth business.

7.4 Businesses are multifunctional. This allows them to spread risks and redeploy resources according to seasonal activities. Diversified businesses require waterside locations and are Broads-specific. The larger sites can respond more easily to new market opportunities and can accommodate a range of activities on their sites. The subdivision of boatyards and selling away from marine uses has undermined the ability of smaller businesses to survive market changes.

7.5 Employees live very locally. Businesses rely on this pool of specialist skills. Policies should therefore ensure an adequate housing supply and the ability for businesses to reinvest or relocate to provide suitable accommodation within the local area. This is particularly true of the Manufacturing/boat repair sector.

7.6 Broads businesses are small, locally owned and managed, with a high proportion of income generated retained in the local area. There is a strong local/internal market in professional services and components trading with each other. However, the benefits of the marine industry are felt unevenly across the Broads. Towns and villages in the south are losing out because of the loss of boatyards to residential redevelopment. Future opportunities may arise with the redevelopment of Lowestoft and a move from commercial to leisure marine.

7.7 The manufacturing base of the industry is large and its export performance is strong. Together with the tourism elements eg the hire boat fleet, these sectors bring money into the area from outside.

7.7 The relationship between number of private moorings/boat movements/ecological impacts/economic activity in visitor and marine business has yet to be understood. It is recommended that a study of private boats be undertaken to ascertain their pattern of use. To what extent does increasing capacity of private moorings have positive effect? How beneficial is it for provision of private moorings to be increased with little/no control (size, location)?

7.8 Moorings themselves require limited investment when on the navigation but basins require dredging. Both require maintenance of quay heading, and generally water and power supplies and car parking as a minimum. There is limited ongoing management and they have limited direct business impacts. The added value is low in comparison with the use of those moorings for fully utilised hire boats. As there is currently a small and consolidated hire fleet, income must be generated through alternative sources.

7.9 However, the study concludes that it is preferable to allow private moorings on a site than for it to be redeveloped away from marine related uses to safeguard its future return.

7.10 A decline in the industry brought about by planning restrictions would have serious implications for the villages close to the Broads. The Broads marine industry contributes to the regional economy and should receive greater recognition for its role in providing a positive image to the East of England. This study has not even assessed the intrinsically related tourism business sector which would greatly increase significance locally and regionally.

7.11 The Authority and Broads Hire Boat federation are grateful to the many businesses who took the time and trouble to contribute to this study. The BMF data and Broads specific analysis has added to knowledge of the economic impact of the industry. The grant received from LEADER+ programme has enabled the study to be completed and published. The Authority and neighbouring district councils now have a much greater understanding of the economic and social impact of the industry and why boatyards should be protected.

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Case Study 1 – Waveney River Centre – Burgh St Peter

Background

The Waveney River Centre is on the River Waveney close to Burgh St Peter. There is a mix of holiday accommodation on the site including lodges, mobile homes, pitches for touring caravan and tents and moorings for visiting craft. The Centre also has a boat building and repair business and moorings for private boats. The facilities on the site include the pub and restaurant, a shop and swimming pool.

The Centre has built up around the staithe and pub and originally relied heavily on visiting holiday-makers arriving by boat. The traditional boating holidays in the 1960s and 1970s would comprise a family on a boat for two weeks which gave ample time to explore all the Broads system (northern and southern Broads). The Waveney River Centre provided a stopping off point for those on the River Waveney being close to Beccles and Oulton Broad.

However, as the hire boat holidays declined, boat yards on the southern rivers closed and the move to shorter breaks led to a decline in the number of hire boats. This had a much greater effect on the southern rivers as it is not easy to navigate from the northern rivers and return within a week. Where there had been 30 boats visiting in a day this gradually reduced to 30 a week.

To provide a viable business development has taken place over the years with the majority of the new works being undertaken in the past 4 years.

Development

The development at the Site has included:

- mooring basins and private moorings,
- boat building and repair workshop;
- static caravans;
- swimming pool;
- extension to pub;
- lodges (replacing static caravans);
- office;
- shop;
- holiday accommodation (penthouses) above shop; and
- touring caravan and tent site and facilities.

The Site enjoys a quiet river side location and the development makes full use of the views and river location. The Centre also hires out day boats, dinghies, canoes and cycles.

All the lodges, cottages and penthouses are equipped to a high standard and can provide accommodation for most of the year. The changing holiday market and in particular people taking shorter breaks throughout the year has seen a two-thirds occupancy of the lodges this February.

Benefits of development

The Centre provides facilities for a wide range of visitors but not primarily for the traditional boat holiday maker although some do still visit. The mix of lodges and camping provide a high level of occupancy throughout the summer and the moorings attract private boat-owners. The nature of the development is such that it has not spoilt the riverside location but due to its ‘remote’ location visitors to the Centre will make more use of the on site facilities such as pub and restaurant than if it had been in a location such as Hoveton. However, it does provide employment servicing the accommodation and other facilities on the site. The level of employment provided by the Centre is 19+ made up from:

- Year Round:
  - 4 full time boat builders;
  - 2 full time site workers;
  - 2 full time admin staff,
  - 1 part time housekeeper;
  - 1 part time cleaner; and
  - 1 part time office assistant.

- Seasonal
  - 1 full time leisure centre supervisor;
  - 3 additional part time cleaners;
  - 2 part time shop and leisure centre assistants; and
  - 2 holiday job (teenagers).

The pub also has a number of full and part time staff which fluctuates throughout the year.

Flood Risk

All the development has taken place above flood level either by location in the higher parts of the site or raising floor levels.

Access to higher ground is within the site due to its sloping nature. The location of the centre on the River Waveney some 20 miles from the Mouth of the river system at Great Yarmouth means there is adequate warning time for tidal floods. The low lying parts of the Centre and access roads do flood but velocities are low and the depth of water is usually between 200mm to 400mm deep. The hazard is therefore low and any flooding is not unexpected.

There are no specific arrangements for emergency access/egress during flooding due to the nature of the flood (time, velocity and depth). Boats are on site should evacuation by water be necessary.

Conclusions

The development of the site has provided a well used holiday facility in keeping with the Broads area. It gives a mix of types of holiday and also caters for private boat owners. The Centre has redeveloped to the changing needs of visitors to the Broads and provides a variety of good quality facilities. This is of economic benefit to the Centre, the local and wider Broads area. It is important that facilities such as at the Waveney River Centre can adapt as necessary to changing holiday and recreation demands of visitors

Aerial View of Waveney River Centre (from website)

Case Study 2 – Barnes Brinkcraft, Hoveton

Background

Barnes Brinkcraft is situated in the boatyard complex at Hoveton. The company provides a mix of holidays afloat and ashore from its hire fleet and holiday lodges. At present there are some 24 holiday hire boats, a number of day boats and 12 lodges.

Over the last 10-15 years the decline in the holiday hire boat industry had serious financial implications for the company as it could not survive as a holiday hire boatyard. The company land holding at Hoveton included a number of boatsheds, offices and mooring facilities. However, as wooden boats were replaced by GRP boats, the need for covered storage to protect paint and varnish through the winter was not required.

The company now run approximately the same number of hire boats but only require one workshop for repair and maintenance.

Although there has been a decrease in hire boat numbers in the Broads there has been an increase in private boats. This has meant an increased demand for private moorings and repair and maintenance facilities.

Development

The development over the last 10 years includes four individual lodges, five apartments in 'The Sail Loft' and three in 'The Boathouse' (for 2008 season). All the accommodation is to a high standard with the type of facilities required by many holiday makers today such as TV & video, fridge/freezer, microwave, etc. All the apartments have river views being set within or on the edge of the working boatyard.

A new workshop has been constructed to carry out maintenance of the hire fleet and private boats. Car parking areas have also been provided for users of the apartments and hire boats.

Benefits of Development

The development of the boatyard from one based solely on a hire fleet to a mix of hire fleet, holiday apartments, private moorings and day boats provides the modern facilities that draws a wider clientele and makes for a viable business. The standard of accommodation offered also extends the letting period. This is around 24 weeks for boats and 30 weeks for apartments but the trend for shorter breaks throughout the year could certainly see the occupancy extended.

The variety of boats and land-based accommodation and the extended usage of the facilities are of benefit not just to the boatyard but the wider area. Visitors to the lodges will use local restaurants and shops and those on boats will use the same types of facilities but on the Broads system.

Employment is also provided in maintaining the hire fleet and holiday accommodation and this amounts to 30 full time and 35 seasonal staff..

Flood Risk

Hoveton is on the River Bure near to the tidal limit and therefore there is the opportunity for long lead in times for flood warning from both fluvial and tidal events. This could be well over 24 hours in most circumstances.

The new developments are on piled foundations and therefore do not sink over time (as was experienced with the older buildings). Floor levels of the accommodation have been set above flood levels and much of the area of the boatyard has been raised over the years.

The low lying parts of the boatyard and access roads do flood but velocities are low and the depth of water is usually between 200mm to 400mm deep. The hazard is therefore low and any flooding is not unexpected.

All the development has been undertaken by replacing old boatsheds and workshops no longer required for the modern boat hire business and therefore is not ‘new’ development but has re-developed an existing boatyard.

There are no specific arrangements for emergency access/egress during flooding due to the nature of the flood (time, velocity and depth) and there are boats on site should evacuation by water be necessary.

Conclusions

The boatyard has redeveloped to the changing needs of visitors to the Broads and provides a variety of good quality facilities. This is of economic benefit to the boatyard, the local area at Hoveton and the wider Broads area.

The development has been carried out in a manner sympathetic to the local area and in such a way that flood risk is minimised.

If development of the boatyard had not taken place it would have led to a rundown area with boatsheds in poor states of repair, a non-viable business attracting few visitors and a subsequent reduction to the economy of the area.

Barnes Brinkcraft – moorings, offices and ‘The Sail Loft’

Case Study 3 – Brundall Riverside

Background

The riverside in Brundall comprises a mix of boat yards providing moorings, boatbuilding, chandlery, hiring; some retail outlets and holiday bungalows. The present mix of use has evolved over the years in response to changes in holiday requirements. For example, the number of hire boats has decreased but the need for private boat moorings has increased dramatically. Brundall now provides moorings for some 1000 boats.

The decline in the boat hire industry has led to boatyards diversifying into areas such as boat engine sales (nationally), angling shops and marinas.

The holiday bungalows' lettings have also had to respond to changing requirements such as improved facilities and extended season into the autumn. In addition to the normal summer lets autumn lets have increased through demand from those wanting a fishing holiday out of the main tourist season when the rivers are quieter.

For the businesses to survive they need to be able to respond to changing demand. This may be a change of use or redevelopment depending on the need and opportunities. The holiday chalets are of primarily wooden construction and therefore have a relatively short life. To provide the high quality required by the market it is necessary to either refurbish or replace the bungalows as the need arises.

However, if the Government guidance on Development and Flood Risk and (PPS 25) is strictly interpreted then it will/may not be possible to change the use of businesses or reconstruct bungalows. This will lead to a reduction in visitors and hence income to the area, potential blight and areas becoming derelict leading to a degradation of the landscape for which the Broads is noted.

This case study explores some of the issues and is based on real examples.

Development proposals

For this case study it is assumed that one of the boatyards wants to change the use of a workshop to a small convenience shop with holiday accommodation above and one of the bungalows requires replacing as it fell into disrepair and was demolished.

Benefits of the development

The holiday industry is a main economic driver for Norfolk. The Norfolk Broads are a nationally important area and tourism in the Broads attracts 2.3 million visitors per year. Visitors to Norfolk come to visit the Broads or the coast and there is no 'passing' trade as it is not en-route to any other destination.

Although the number of hire boats has decreased there is still a buoyant market for land based holiday accommodation and over an extended season. For this to remain viable the properties need to be in good repair, in locations people want to stay such as on the river's edge, and of construction and with facilities that reflect the needs of today's society.

Those staying in the area also require shops for food and possibly equipment from angling stores and chandleries. If these facilities are not available locally then visitors will either chose to holiday elsewhere or bring their own supplies, both to the detriment of the local economy.

There are therefore economic benefits from providing visitors with their needs locally. This extends to jobs associated with retail outlets and also with managing the holiday accommodation including servicing.

Flood Risk

The riverside area in Brundall is in Flood Risk Zones 3a (high probability) and 3b (functional floodplain) and over time with climate change will all be in Flood Zone 3b. This Zone is described as the area flooding with an annual probability of 1 in 20 or greater and only suitable for water compatible or essential infrastructure (where an exception test has been undertaken).

Development in Flood Zone 3b will therefore be severely restricted and this can be seen in a recent application to rebuild a demolished bungalow on the river bank at Brundall. Residential development is classed as 'more vulnerable' in PPS 25 and therefore not allowed in Flood Zone 3b.

However, the development on the river bank has been there for many years and lives with the flood risk. The properties are raised above the flood level and any flooding of the surrounding area is slow to happen with the opportunity for many hours to warn people. In addition, flood velocities are minimal due to the nature of the flooding and the rise in water level is slow. There is high ground to the north (towards the village) which can be accessed to provide refuge and the depth of flooding is such that access can be gained by larger vehicles.

Floods in the area also have relatively short duration of days (typically two days but with the levels reducing on the low tide making the road passable) and the construction of the buildings is such that normal activities can be resumed relatively quickly and easily.

Planning Issues

The development is within Flood Zone 3b and is not water-compatible as defined by PPS 25. The bungalow and holiday accommodation is classified as 'more vulnerable' and the shop as 'less vulnerable'.

However, as both the workshop and chalet are solid buildings in developed areas, their functionality is not as a functional floodplain, and therefore the area could be defined as Flood Zone 3a. However, there are still limitations on development to ensure risk is as low as possible and for both the intended uses, accommodation and shop, the exception test has to be passed.

For this case study the exception test is passed as:

a. the benefits of the developments accord with the Broads Authority core strategy relating to tourism and the economy;
b. they are on previously developed land; and
c. they do not increase flood risk elsewhere and can be demonstrated to be safe.

Flood Resistance, resilience and safety

In order to reduce the risk to people and property the following actions would need to be undertaken.

Property
Construction should be water resilient in accordance with current guidance including 'Preparing for Floods' (DETR February 2002) and 'Improving the Flood Performance of New Buildings: Flood Resilient Construction' (CLG 2007). This would include using water resilient materials, placing all electrics above flood level, non return valves for drainage and designing to facilitate clearing up after the flood.

People
A flood plan should be produced to:

a. inform residents and visitors of the risk of flooding;
b. identify safe egress routes in an evacuation plan; and
c. list what to do in the case of a flood warning.

Both the shop and holiday bungalow could have seasonal occupation from Easter to end October. This means that occupation will be outside of the main flood season.

Conclusions

The Broads is a wetland environment and has always been subject to flooding. The interest of the Broads to both visitors and residents is the water and wetland environment either from being on the water or close to it. The lack of limited development such as replacement of holiday accommodation and provision of facilities for visitors will give rise to blight, derelict areas of land and lack of confidence in businesses all of which will have a negative economic effect on the area.

Limited development which is resilient to floods and safe can be provided. This will give the necessary infrastructure to encourage visitors which is vital for the economic well being for the area.

Aerial view of Brooms boatyard (from website)

Survey of Marine Businesses in the Broads

Broads Authority
The Broads - a member of the National Park family

The Broads Authority very much hopes you can help us provide evidence to back up our planning policies to protect marine industries in this area.

We have been working with the British Marine Federation (BMF) and the Broads Hire Boat Federation. Every year the BMF carries out a survey of its members. They have produced a Broads wide picture of employment and turnover of its Broads based members. Now we need some more local information so that we can draw a map to show how important Broads businesses are to the local economy. The information will not be attributable to individual companies as it will be amalgamated and also portrayed on a map.

I would be very grateful if you could answer a few questions it should take about 10 minutes. The questions cover where your staff come from, where your suppliers are located, where your customers come from.

It would be helpful if a range of different sizes of companies could answer the questions. This will enable us to illustrate on a map the economic influence of Broads businesses. It will also support us when advising neighbouring authorities on their planning policies eg for local housing.

Please could you complete as much of this survey as possible and return it to me. If I do not hear from you, you will receive a telephone call from a surveyor who will go through the questions on the telephone if this is easier for you. I aim to feedback the results at a meeting of the BHBF in April.

Please return this survey before 3 March 2008

Many thanks for your time

Gillian

Gillian Morgan

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If you would like further information on planning, extensive information on Planning policy and making planning applications is available on our website: www.broads-authority.gov.uk

Survey of Marine Businesses in the Broads

Firstly, please can you tell me the different commercial activities you undertake at your site.

Boat building	Yes/No
Boat design	Yes/No
Fitting out of hulls	Yes/No
Marine equipment manufacture	Yes/No
Marine equipment supply	Yes/No
Boat Repair and maintenance	Yes/No
Boat Hiring	Yes/No
Pleasure boat services	Yes/No
Private moorings	Yes/No
Sales of new boats	Yes/No
Sales of second hand boats	Yes/No
Wholesale marine equipment	Yes/No
Winter private boat storage.	Yes/No
Facilities for "do-it-yourself" maintenance of private boats	Yes/No

Chandlery sales	Yes/No
Angling retail	Yes/No
General retail	Yes/No
Pub/cafe/restaurant	Yes/No
holiday chalets	Yes/No
leisure centre	Yes/No
Other uses (list)	

Name of your Company	
Full Postcode	

In which towns or villages do you and your Employees live?

	Enter Number of staff
Norfolk	
Acle	
Attleborough	
Aylsham	
Blofield	
Brundall	
Caister	
Costessey	
Cromer	
Dereham	
Dersingham	
Diss	
Downham Market	
Earlham	
Fakenham	
Gaywood	
Gorleston	
Great Yarmouth	
Harleston	
Hellesdon	
Hethersett	
Hingham	
Holt	
Hunstanton	
Kings Lynn	
Loddon	
Long Stratton	
Martham	
Mundesley	
Norwich	
North Walsham	
Poringland	
Reepham	
Sheringham	
Sprowston	
Stalham	
Swaffham	
Taverham	
Thetford	
Tuckswood	
Watton	
Wells	
Wroxham	
Wymondham	
Other Norfolk	

	Enter Number of staff
Suffolk	
Aldeburgh	
Beccles	
Brandon	
Bungay	
Bury St Edmunds	
Capel St Mary	
Clare	
Debenham	
Elmswell	
Eye	
Felixstowe	
Framlingham	
Glemsford	
Gt Cornard	
Hadleigh	
Halesworth	
Haverhill	
Ipswich	
Ixworth	
Kedington	
Kesgrave	
Kessingland	
Lakenheath	
Lavenham	
Leiston	
Long Melford	
Lowestoft	
Mildenhall	
Needham Market	
Newmarket	
Oulton Broad	
Saxmundham	
Southwold	
Stowmarket	
Stradbroke	
Sudbury	
Thurston	
Wickham Market	
Woodbridge	
Other Suffolk	
Other	

<u>In Which towns or villages do *YOUR* suppliers of goods and services have their premises?</u>

	code
Bank	A
Accountant	B
Solicitor	C
Insurance agent	D
Computing	E
Printers	F

Cleaning (if external)	G
Other professional services	H
Materials/components	I
Boats/hulls	J
Equipment/machinery	K
Catering supplies	L

Builders/construction	M
Fuel	N
Transport	O
Other key suppliers ie:	P

Please insert letter code(s) against all relevant places

eg if you accountant comes from Acle

Acle	*B*

Norfolk	
Acle	
Attleborough	
Aylsham	
Blofield	
Brundall	
Caister	
Costessey	
Cromer	
Dereham	
Dersingham	
Diss	
Downham Market	
Earlham	
Fakenham	
Gaywood	
Gorleston	
Great Yarmouth	
Harleston	
Hellesdon	
Hethersett	
Hingham	
Holt	
Hunstanton	
Kings Lynn	
Loddon	
Long Stratton	
Martham	
Mundesley	
Norwich	
North Walsham	
Poringland	
Reepham	
Sheringham	
Sprowston	
Stalham	
Swaffham	
Taverham	

Thetford	
Tuckswood	
Watton	
Wells	
Wroxham	
Wymondham	
Other Norfolk	
Suffolk	
Aldeburgh	
Beccles	
Brandon	
Bungay	
Bury St Edmunds	
Capel St Mary	
Clare	
Debenham	
Elmswell	
Eye	
Felixstowe	
Framlingham	
Glemsford	
Gt Cornard	
Hadleigh	
Halesworth	
Haverhill	
Ipswich	
Ixworth	
Kedington	
Kesgrave	
Kessingland	
Lakenheath	
Lavenham	
Leiston	
Long Melford	

Lowestoft	
Mildenhall	
Needham Market	
Newmarket	
Oulton Broad	
Saxmundham	
Southwold	
Stowmarket	
Stradbroke	
Sudbury	
Thurston	
Wickham Market	
Woodbridge	
Other Suffolk	
Other East England	
Rest of UK	
Outside UK	

Moorings	Number of Boats
What is the total mooring capacity of your boatyard	
How many are permanent moorings for private leisure craft	
How many are permanent moorings for private residential craft	
How many are visitor moorings	

We would like to plot the general area that your customers come from

I only need rough approximations & it would be useful to separate the holiday and leisure visitors from the marine business. Table 1 & Table 2 should together add to 100%:

Firstly, Moorings, chalets, boat hirers

Table 1

Leisure Customers	**% Turnover Approx**
Within/adjacent Broads	
Norfolk/Suffolk	
Rest of East Anglia	
Rest of UK	
Europe	
Rest of world	

Secondly, the rest of the business

Table 2

Marine business Customers	**% Turnover Approx**
Within/adjacent Broads	
Norfolk/Suffolk	
Rest of East Anglia	
Rest of UK	
Europe	
Rest of world	

Here are 2 statements. To what extent do you agree with them or not.

	Strongly agree	agree	neither agree nor disagree	Disagree	Strongly disagree
It is important to my business to be located at the waterside					
It is important to my business to be located in the Broads					

Do you have any future aspirations for your site? ....

....
....

Thank you very much for sparing your time today Would you like to be sent a copy of the report of this survey?   YES / NO