

# Broads Recreation and Tourism Strategy 2024-29

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# 1. Introduction

**Note:** The Broads Authority is currently preparing the Recreation and Tourism Strategy 2024-29 and linked Broads Integrated Access Strategy 2024-29. Both draft plans will be subject to public consultation, and the final plans are due to be adopted in Spring 2024.

**Comments on this draft strategy should be submitted by 5pm on 17 February 2024 to Rob Leigh, Broads Authority, Yare House, 62-64 Thorpe Road, Norwich NR1 1RY, or by email to [Rob.Leigh@broads-authority.gov.uk](mailto:Rob.Leigh@broads-authority.gov.uk)**

## 1.1 About this strategy

The Broads National Park is an internationally important wetland, and a unique member of the UK National Parks family. The landscape has been shaped by centuries of human intervention, creating a rich mosaic of water and land habitats that host some of the rarest wildlife in Europe.

The **Broads Authority** is responsible for the management of the Broads executive area, and one of its statutory purposes is to promote opportunities for the understanding and enjoyment of the special qualities of the Broads by the public. The area attracts more than seven million visitors a year, and tourism is vital to the local economy.

The **Broads Recreation and Tourism Strategy** sits under the [Broads Plan](#), the high level statutory management plan for the area, and sets priorities for the next five years.

## 1.2 Resources

The Broads Authority's Communications Team (within the Strategic Services Directorate) promotes the Broads National Park through print and digital information and interpretation, signage, events, and visitor services including information centres and yacht stations.

With limited staffing and financial resources, partnership working and external funding are vital to the successful delivery of this strategy. In particular, the Authority works closely with [Visit the Broads](#), the Destination Management Organisation (DMO) for the area and the Authority's main delivery partner for the strategy.

**Visit the Broads** provides a unified voice for local tourism-related businesses and others with an interest in visitor activity. It is funded by its members, and staffed by a part-time officer who manages business memberships and marketing activity. The Authority supplies staff time and financial resources to support marketing and promotions activity including events, the Visit the Broads website and Broads National Park social media accounts, and advertorial pages in the 'Broadcaster' visitor magazine. In the past, the Authority has also secured external funding for interpretation, signage and paid social media advertising.

The Authority also works closely with the Broads Charitable Trust, which runs the Visitor Giving Scheme for the Broads.

The [Landscapes Review](#) (2019) states that the Government's approach to funding national protected landscapes is not as diverse and sustainable as it should be. However, as Government core funding is unlikely to rise, it will become increasingly important to pursue commercial and other opportunities provided by each area's unique brand to help support local projects and services. Current ideas include corporate sponsorship, National Parks Partnership initiatives, visitor giving schemes, trusts and charities, and increased retail sales.

## 2. Where we are now

Much has changed since the last tourism strategy for the Broads was produced in 2016<sup>1</sup>. The Covid-19 pandemic prompted a positive shift in peoples' attitudes towards the benefits of nature for health and wellbeing, and protected landscapes like the Broads saw a surge in visitors, including many visiting for the first time.

At the time of writing, the local tourism and hospitality sector is still adjusting to the 'new normal' following the end of the pandemic. While initial sector trends were encouraging, ongoing recovery faces other challenges, including the slowing global economy and the UK cost of living crisis. International tourism has also been affected by industrial action in the travel industry, and by the impacts of climate change, with irregular weather patterns, extreme heat, wildfires and flooding recently seen in popular visitor destinations.

The figures in paras 2.1 to 2.11 are from STEAM<sup>2</sup> reports, and from Broads Authority records including boat registrations. References to 'the area' relate to the economic impacts of tourism within the Broads executive boundary and the immediately surrounding areas that staying visitors use as a base for visits into the Broads.

### 2.1 Visitor numbers

The number of visitors to the area peaked at 8.2m in 2019. 2020 and 2021 (the pandemic years) saw 4.8m and 7.2m visitors respectively, and 2022 saw 7.6m. Figures for 2023 are awaited, but anecdotal evidence from the Broads and other UK National Parks suggests a decline from 2022, affected by the ongoing cost of living crisis, poor summer weather, and more people returning to overseas holidays.

The unplanned surge in visitors to the Broads during the easing of Covid travel restrictions helped the local economy, but also created significant issues for the management of visitor safety and environmentally friendly behaviour. This has highlighted areas for improvement, including the need to manage future uncertainty.

### 2.2 Visitor profile

The 2016 tourism strategy showed the area's visitor profile as approximately 50% couples, mostly aged over 45; 30% families, mostly with children under 11; and 20% groups of friends, mostly aged over 45. This profile changed dramatically in 2020 and 2021, when travel was severely restricted by the pandemic, and the Broads saw

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<sup>1</sup> [Broads Sustainable Tourism Strategy \(2016\)](#)

<sup>2</sup> The [STEAM](#) model measures tourism economic impact within UK regions.

much higher numbers of first-time and younger visitors, a common theme across UK National Parks.

While most visitors are from the UK, external funding in recent years has supported initiatives to attract more international visitors to our National Parks, including the [English National Park Experience Collection](#). The 'Broads Experience Collection' has developed into ongoing promotion to the international travel trade, led by [Visit East of England](#). In 2024 there will be renewed focus on attracting American visitors, to coincide with the Apple TV mini-series 'Masters of the Air' and the associated documentary 'The Friendly Invasion', produced by Spielberg and Hanks. It is hoped these \$295m productions will inspire more Americans to visit the UK, particularly to the East of England to retrace the steps taken by relatives during World War 2.

### 2.3 Tourism economy and employment

The economic impact of tourism in the area was £593m in 2016, peaking at £666m in 2019 before declining to £382m in 2020 (the height of the Covid lockdowns). The figures of £618m in 2021 and £711m in 2022 look more positive, but are distorted by high inflation; people have less disposable income, and are not visiting in higher numbers, but businesses have been affected by significant rises in energy, fuel, services and supplier costs, resulting in higher prices being passed on to their customers.

Tourism in the area supported 6,974 FTE jobs (5,323 directly related to tourism) in 2022.<sup>3</sup> The 2022 figures show an employment decrease of 4% compared to 2016, when the previous strategy was adopted. Factors affecting staffing levels include challenges in recruitment and retention, pressures from increased costs (energy, services and supplies), and greater competition for talent from other sectors. While many jobs are full-time, the seasonality of tourism limits the sector's ability to provide year-round employment.

### 2.4 Broads Tourism Business Survey

In Dec 2022-Jan 2023, the Broads Authority surveyed Broads' tourism providers to gather evidence on their business performance, challenges and opportunities, and approaches to sustainable tourism. 48 businesses responded across the full range of sectors. Most were sole traders, micro or small businesses, with only 5 businesses having more than 51 employees. This is a fair reflection of the business profile in the Broads' tourism sector. The key findings are noted below.

- **Business performance in 2022 compared to 2019 (pre-pandemic):** 63% reported it was the same or better; 12% didn't know or had traded for less than 3 years. Future confidence in the 2023 season was lower, with 51% predicting it would be the same or better than in 2019; early indications are for a slower recovery compared to 2021 and

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<sup>3</sup> FTE = Full time equivalent. Directly related FTEs are generated directly through visitor expenditure (food and drink, accommodation, recreation, shopping, transport), while indirect FTEs are supported through the supply chain and further expenditure, including employee spend.

2022, potentially due to the ongoing domestic cost of living crisis and poor weather throughout the summer season.

- **Visitor markets:** The markets targeted as the highest priority were UK stay visitors, local residents and domestic day visitors.
- **Staff recruitment:** Only 17% of businesses said they had no challenges recruiting; 27% had no employees or did not recruit. 37% had difficulties recruiting to seasonal roles, 27% to year-round roles and 32% to some specific roles. Several businesses reported difficulties in more than one of these areas.
- **External factors:** Of 23 listed factors directly affecting business performance, the most common were: Increased energy/fuel costs (83%); poor UK economy / less money in consumer's pockets (81%); increasing supplier costs (78%); poor/unpredictable weather (46%); seasonality of the destination (44%); availability of people to fill vacancies (37%).

All factors attracted at least 3 responses, with increasing operating costs seen as the biggest barrier to improved performance and growth (46%). In response, 68% of businesses had increased their prices and 25% had delayed investment, building or maintenance works.

- **Seasonality:** When asked which quieter months had the most potential for extra trade if better promoted, March, April, May and October all attracted scores of over 80%.

## 2.5 Accommodation

About 15% of all visitors stayed overnight in 2022, with the average stay of 5.3 days being one of the highest among all UK National Parks. There is no reliable data on bed space numbers.

There are more than 700 hire boats with cabin accommodation, and 67 hire houseboats, each accommodating 2-12 people. Typically, hire boats are available from March to the end of September. More than 6,000 privately owned boats and houseboats have cabins that can provide leisure accommodation.

Land-based accommodation is varied, with self-catering a key sector.

Accommodation ranges from budget, luxurious and boutique hotels to pubs, B&B establishments, self-catering cottages and holiday parks. In recent years there has been an increase in AirBnb properties including log cabins, shepherds huts and yurts. Glamping, camping, caravans and touring motorhomes also increased in popularity following the Covid pandemic, with people seeking cheaper holidays and landowners opening pop-up sites.

## 2.6 Waterborne activities

The boating offer includes privately owned boats and a hire fleet offering boating holidays and day trips. Boating is a major influence on the performance of the visitor economy, and the tolls paid by all registered boat owners contributes directly to the Broads Authority's ongoing maintenance of the waterways, without which the



appeal of the Broads would be lost.

Comparisons of registered boat numbers between 2016 and 2022 show some important trends. Of the 12,549 vessels registered on the Broads in 2022, 89% were privately owned. The number of privately owned boats increased by c.6% with the biggest increases being houseboats (+49%, 22 more boats) and paddle craft such as rowing boats, canoes, kayaks and paddleboards (+35%, 541 more craft). Notable decreases were sailing craft (-22%, 246 fewer craft) and auxiliary yachts (-9%, 103 fewer craft).

Although the hire fleet only represents only c.11% of the registered boats on the Broads, they contribute around a third of the BA's toll income. Notable changes to the hire fleet were a decrease in motor cruisers (-15%, 116 fewer cruisers) and sailing craft (-29%, 29 fewer craft). There were increases in day launches (+23%, 68 more launches) and rowing craft (+20%, 38 more craft). The context behind some of these changes is that boatyards have been changing their motor cruiser fleet to larger, more luxurious boats with more onboard facilities. These extend the usual hire season (late Spring and Summer) and command greater hire fees. The vast majority of hire boatyards are in the Northern Broads, which means the waterways south of Breydon Water are traditionally quieter.

Paddle sports are becoming increasingly popular, particularly since the pandemic, when many young people discovered paddleboarding and canoeing as an affordable and easily accessible way to experience the waterways, especially the quieter reaches. 2,026 more paddle/rowing craft used the Broads in 2022 compared to 2016. Members of British Canoeing can use their craft on the Broads and other English waterways, with some of the membership revenue directed to the Broads Authority. Membership of British Canoeing increased from 36,407 to 93,306 members between 2018 and 2022, a rise of 259%.

The BA sells 'short visit' tolls to people who do not need an annual toll. These sales have increased by 23% since 2016. 3,477 short visit tolls were sold in 2022, of which 2,012 (58%) were non-powered craft. Short visit tolls for paddle/rowing craft has increased by 72% since 2016.

The demand for day boats has risen since 2020, with an increasing number of them being electrically powered.

## 2.7 Walking and cycling

The area has 303km of public rights of way, including three county long distance trails and part of the national England Coast Path trail. However, while the landscape is mostly flat, walking conditions can be tricky, including on managed reserves, with muddy surfaces due to wetland habitats, and the rights of way network is limited in parts of the area. There are also concerns about the future of permissive access negotiated within Agri-Environment Schemes with life-limited agreements. While some short and circular walks are promoted, the offer is fragmented. The three

longer distance routes are waymarked and maintained within Norfolk County Council's Norfolk Trails programme. Promotion of walking trails includes the [Norfolk Trails access-tested trails booklets](#) and the Broads Park Rangers' Favourite Walks book (2022, Harper Collins), and routes are also featured on the Visit the Broads website.

The flat landscape of the Broads is well suited to leisure cycling and there are many quiet country lanes ideal for less experienced cyclists. National Cycle Network Route 1 and Regional Route 30 both skirt the Broads, and are long distance routes rather than short circular rides for half or full-day rides. The Broads by Bike website and printed booklet offer 16 circular rides using the country lane network, with some short off-road sections. These routes were originally mapped by the Cycle Hire Operators Forum, but this organisation no longer exists and the booklet will need updating within the next few years, potentially linked with established, widely used cycling route apps.

The number of cycle hire operators has decreased in the last 20 years from around 10 hire points throughout the Broads to only three, as a result of the poor business case for cycle hire and the lack of good off-road routes. External investment is needed to improve the situation.

## 2.8 Angling

The Broads has a thriving angling scene. The coarse fishing season runs from 16 June to 14 March, meaning angling visitors help to extend the tourism offers from the boat hire, land-based accommodation, retail and hospitality sectors. According to the [Broads Angling Services Group](#), angling accounts for at least 16% of visitors to the area and contributes c. £120m to the local economy each year.

## 2.9 Wildlife, heritage and culture

The Broads is one of the most important freshwater wetlands in Europe, with many sites designated internationally and nationally for their importance to nature conservation. The area is home to more than 25% of the UK's rarest species of wildlife.

There are nature reserves and wildlife sites throughout the Broads, owned and managed by a variety of conservation bodies and private landowners. These sites are highly important in providing access to the area's unique biodiversity, especially for land-based visitors. Many sites have informal access throughout the year and from dawn to dusk, and a small number have visitor facilities and infrastructure. Some facilities, such as visitor centres and guided boat trips, run on a seasonal basis.

Water quality and quantity have to be carefully managed, both for nature and for people. The increasing impacts of climate change and rising sea levels present significant challenges for the management of this low-lying coastal location, as identified in the [Broads Plan 2022-2027](#). Compared to these pressures, the impacts of tourism development and activity on the natural environment have been relatively



limited. However, threats from human disturbance to habitats and species in specific locations and at certain times of year require sound management and a responsible approach by visitors and the tourism sector as a whole.

The Broads has significant cultural heritage value, with extensive evidence of past human settlement and landscape change. Many individual sites, often small in scale, relate to the area's history of peat extraction, reed and sedge cutting, land drainage and other activities associated with a wetland environment. There are around 63 remaining windpumps and windmills in various states of repair, access and use. Among a number of schemes, the HLF-funded [Water, Mills and Marshes project](#) has given major impetus to restoring and interpreting these iconic structures.

The area's settlements are an important part of its built heritage and visitor appeal, notably for their staithes and other waterside features. The quality of the public realm (outdoor, publicly accessible spaces) and the conservation of the built heritage is variable, and in need of improvement in places. Churches feature strongly in the flat landscape, and some have accessible towers providing fine views. Some churches and historic religious sites, such as St Benet's Abbey, have benefited from conservation and interpretation projects in recent years. Boating is in itself a hugely important part of the area's heritage, and the remaining wherry fleet gives a special dimension to the physical and cultural landscape.

## 2.10 Attractions, food and drink, shopping

There are relatively few visitor attractions within the Broads, and they tend to be related to the culture and heritage of the area. The largest attractions such as 'Bewilderwood' have c.150,000 visitors a year.

Pubs, restaurants, tearooms, takeaways and cafés play an important role, with many sited in waterside locations. It is felt that the quality and breadth of the offer has generally improved in recent years. There has been a small number of closures, while other businesses have benefited from significant investment. Locally produced or sourced produce is becoming more common, including several breweries and vineyards, and increasingly popular as visitors look to reduce their own carbon footprint.

The Broads sits between popular coastal resorts, market towns and the city of Norwich, and there are numerous food, drink and retail outlets and large-scale attractions within a short distance of the Broads, such as theme parks, cinemas, aquariums, miniature railways, formal gardens and racecourses. Shops and arts & craft centres within the area range from sizeable outlets in busy settlements like Wroxham to a small but growing number of craft studios, mainly in more rural locations; in 2023, the Norfolk Open Studios tour included c.50 studios within the Broads.

## 2.11 Physical access

Recreation and tourism in the area rely on good public access on land and between land and water, alongside appropriate services and facilities. The need to plan for the impacts of climate change (particularly changing water levels) is acknowledged, as is the need to provide access in ways that will not damage fragile wetland habitats or disturb wildlife.

Actions to maintain and improve the physical access network to and around the area are identified in the [Broads Integrated Access Strategy](#). Wider county and regional access, travel and local plans also recognise the need for more investment in public transport, walking and cycling facilities, and links between visitor hubs such as rail stations, town centres, tourist attractions and riverside access points and facilities.

The Visit the Broads website includes information on [Accessible visits in the Broads](#) including easier access walking routes, boats and boat trips, museums and nature reserves.

## 2.12 Information and events

Visitors need clear and consistent information, both before and during their visit.

As the DMO for the area, [Visit the Broads](#) is the official website for promoting information about the Broads National Park. A Visit the Broads mobile phone app is also available.

Budget cuts and a move to the provision of online information have led to the closure of Local Authority run Tourist Information Centres (TICs), including at Norwich and Great Yarmouth. The Broads is unique in that it is a somewhat hidden landscape to land based visitors and face-to-face advice regarding places to go and things to do is still valued. The Broads Authority TICs at Hoveton, How Hill and Ranworth remain very popular as do the boat trips which run from these locations, offering a taste of boating on the Broads. The Authority also runs 3 yacht stations at Norwich, Reedham and Great Yarmouth. The Norwich and Great Yarmouth yacht stations provide boating visitors a means of accessing all that the city and seaside town have to offer during their stay. Reedham and Great Yarmouth are popular mooring locations for those travelling between the Northern and Southern Broads, crossing Breydon Water. Because they are more tidal these can be tricky locations to moor and these staffed facilities provide safety benefits and reassurance to inexperienced boaters.

Other opportunities for physical information points have been developed, including the phone box visitor information point in Thurne and the Broads Discovery Hub network developed by the Broads Charitable Trust. The Authority has been participating in trials to reinstate a TIC at the Forum in Norwich alongside the Forum Trust, Norwich City Council and Norwich Bid. This is viewed as valuable way of inspiring city residents and visitors to access the Broads. A Broads National Park visitor centre is also proposed as part of a future substantial redevelopment of the Richardsons Leisure boatyard in Stalham.

There is still a demand for printed information, especially for popular publications like the annual visitor newspaper Broadcaster, published by the Broads Authority, but most people expect to access information digitally through websites, social media and phone apps. While

the use of digital media is increasing, poor Broadband and mobile phone coverage in parts of the Broads is an ongoing challenge.

Broads National Park representation at organised events like the Royal Norfolk Show, and self-led or guided visitor itineraries and packages such as the 'Broads Experiences Collection' and guided Ranger walks, are a useful way to introduce people to what the Broads has to offer. However, it is recognized that more should be done to produce information tailored to more diverse and hard-to-reach audiences.

Working alongside this strategy is the [Education Strategy for the Broads](#), which seeks to educate, increase awareness in and inspire future visitors to the Broads through education and outreach work with young people and under-represented groups.

### 3. Looking ahead

The UK's protected landscapes are facing significant challenges. They must work harder to mitigate and adapt to the increasing impacts of climate change, and are critical for the Government's ambitious target of protecting 30% of the UK's landscape for nature and halting the decline in species abundance by 2030. They also need to manage tourism and recreational activity in sustainable ways, and attract new and more diverse audiences.

These challenges are highlighted in the [Landscapes Review](#), which sets out 27 proposals for the future management of England's National Parks and AONBs, including priority actions for nature recovery, responding to climate change, and providing 'landscapes for everyone'.

#### 3.1 Sustainable recreation and tourism

For many years, the UK's National Parks and AONBs have promoted sustainable recreation and tourism as fundamental to meeting their statutory purposes and duties. Such activity has generally been welcomed where it supports local economies and employment, complements the area's natural and cultural heritage, and promotes physical and mental health and wellbeing.

In 2024, [National Parks UK](#) intends to invite its members to sign up to a common vision:

'UK National Parks will be leaders in regenerative tourism. We will champion and support tourism development that contributes to the enhancement and regeneration of the places and communities in which it operates, supporting tourism activity that helps reduce carbon emissions and increase nature recovery, whilst ensuring National Parks are relevant to everyone's needs.'

#### Greener tourism provision

Most respondents to the recent Broads tourism business survey said that reducing the impact of their business on the environment had become more important to them over the last 3 years. The most popular reasons were to reduce energy use/costs (73%), to reduce waste generation and costs (63%), and to highlight business commitment to climate change through actions such as local food offers and ethical purchasing (63%). Only one respondent said that sustainability was not important to their business.

The most common sustainability actions these businesses were taking were recycling (77%), preference for local suppliers (70%) and energy saving (68%). The most popular planned activity was to monitor utility and wastage (25%). 73% did not have, or had no plans to implement, an optional green donation scheme for customers.

However, membership of the Broads Green Tourism Business Scheme is low, and only 10% of respondents to the recent business survey were members of a green tourism accreditation scheme. Businesses said that barriers included financial implications, a lack of knowledge, other pressures taking priority, and being uncertain that the changes they could make would have a real impact.

When asked what would encourage businesses to be 'greener', the most popular response was more information (55%). The most common barrier was the fear that sustainable practices might have a negative impact on their financial bottom line (35%). The most important measures to drive sustainable tourism development across the Broads were seen as better promotion of the area as a sustainable tourism destination (63%), more electric vehicle/boat recharging points (60%), improved public transport (58%), and more provision for active travel (55%).

#### Reducing our carbon emissions

In 2022 the [Greenhouse Gas Emissions Assessment and Target Scenarios report for the Broads](#) was published by Small World Consulting Ltd. Similar reports were produced for all UK National Park Authorities and some Areas of Outstanding Natural Beauty (AONBs) to provide a robust and consistent evidence base for climate action across UK protected landscapes. The report for the Broads gives a consumption-based assessment of the greenhouse gas emissions attributable to residents and visitors, and recommends targets towards a low-carbon economy.

In 2019, total carbon emissions from tourism in the Broads were 198,322 tonnes of carbon dioxide equivalent (tCO<sub>2</sub>e)<sup>4</sup>; 112,728 tCO<sub>2</sub>e were from travel to and from the area, 70% being vehicle fuel. To give some context, Broads' residents contributed 252,105 tCO<sub>2</sub>e and Broads' industry contributed 341,896 tCO<sub>2</sub>e.

Of the 85,594 tCO<sub>2</sub>e emission from visitor stays in the area, 52% was from food and drink, 6% from vehicle fuel and 7% from boat use. Car travel was the single largest contributor, being 33% of the combined footprint of residents and visitors.

The report recommends a 10% reduction in visitor travel emissions to and from the Broads per year, and a 5% reduction in emissions from food and drink consumption and other goods bought by residents and visitors. Measured from the 2019 baseline, this would require a 61% reduction in visitor travel emissions and 37% reduction in food and drink emissions by 2029. The [Broads Climate Statement](#) (2019) includes an ongoing commitment to working with local organisations to reduce carbon emissions and to promote sustainable tourism.

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<sup>4</sup> tCO<sub>2</sub>e is a measurement covering the seven main greenhouse gases. It weights each gas based on its potential to cause [global warming emissions \(data.gov.uk\)](#).

## Managing flood risk

The [Broadland Futures Initiative](#) is currently developing a long-term integrated flood risk management strategy for the Broads and interrelated coast. This work includes engaging with a wide variety of stakeholders, including those with recreation and tourism interests, to improve the resilience of people, places and the environment to flooding and our changing climate.

## 3.2 Attracting wider audiences

Evidence shows that access to nature is beneficial to people's physical and mental health and wellbeing. While a positive outcome of the pandemic was a new perspective for many people on the appeal of the natural environment, the [Landscapes Review](#) pointed out that our protected landscapes are sometimes seen as an exclusive, mainly white and middle-class club, and they must do more to encourage greater visitor diversity. The Review names underrepresented groups as older people, the young, those from lower socio-economic groups, people with disabilities and Black, Asian and minority ethnic communities.

### Broads National Park brand identity

Clear and coordinated messages about the area help to strengthen visitors' understanding and enjoyment. In 2015, the Broads Authority adopted the Broads National Park brand, developed for Visit the Broads and its business members to promote the area with a consistent identity for the benefit of the visitor economy. The brand does not change the Authority's statutory purposes or the legislation for the management of the Broads. The Broads remains a unique member of the family of 15 National Parks in the UK.

Experiential travel is becoming an increasingly influential travel trend, as people look to immerse themselves fully in the areas they visit. The Broads Authority helped to develop a 'Broads Experiences' collection (part of the English National Park Experience Collection), which has developed into ongoing promotion to the domestic and international travel trade, led by [Visit East of England](#). Alongside the Broads National Park brand, this initiative is helping to increase awareness of the area's special status and qualities.

## 3.3 Destination management

The [UK Tourism Recovery Plan](#) notes that, as well as having a significant impact on supply and demand, the Covid-19 pandemic emphasized structural barriers holding back the tourism industry from reaching its full potential, including market fragmentation and a lack of information about the tourism offer across the UK.

Destination Management Organisations (DMOs) coordinate tourism marketing campaigns for a defined area. In 2021, the Government commissioned an [independent review of DMOs](#) to see whether there is a better model to support English tourism at the regional level. As a result, it is creating three tiers of DMO: A top tier of 15-20 Destination Development Partnerships, funded by Government; a second tier of up to 40 accredited Local Visitor Economy Partnerships (LVEPs) to be supported by Visit England; and a third tier of non-accredited DMOs that will receive little or no support from Visit England.

[Visit the Broads](#) does not meet the criteria to become a LVEP, and would be classed as a third tier DMO. Norfolk County Council has agreed to support Visit Norfolk to develop an application for a Norfolk LVEP, hopefully expanded to include Suffolk. If the bid is successful, the LVEP will provide an opportunity to get support from Visit England within a boundary that reflects the geography of the Broads.

### 3.4 Summary of strengths, weaknesses, opportunities and threats

The summary in Table 1 is based on updates from the last Broads Tourism Strategy, Sustainability Appraisal baseline data for the Broads Plan 2022-27, the Broads Tourism Business Survey 2022, and STEAM data.

**Table 1**

SWOT analysis of recreation and tourism in the Broads

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Unique wetland of international importance and member of the UK National Park family.</li> <li>• Diverse and highly valued biodiversity.</li> <li>• More than 200km of navigable and lock-free inland waterways; long-established leisure boating culture and economy.</li> <li>• Popular destination for boating, angling and land-based activities including walking, cycling and wildlife watching.</li> <li>• Significant cultural and heritage assets, including 60+ iconic drainage mills.</li> <li>• Wealth of archaeological remains (the Broads itself is identified as a site of Exceptional Waterlogged Heritage).</li> <li>• High levels of tranquility and dark skies through much of the area.</li> <li>• An established and independent charitable trust.</li> <li>• Close to varied and complementary visitor destinations, including Norwich and the East coast.</li> <li>• Good rail access in some areas.</li> </ul>	<ul style="list-style-type: none"> <li>• Imbalance between Northern and Southern Broads in supply and demand.</li> <li>• Inconsistent quality in accommodation and catering offers.</li> <li>• Lack of coordination between tourism-related bodies.</li> <li>• Lack of 'point of need' visitor information</li> <li>• Poor broadband and mobile coverage in some areas.</li> <li>• Insufficient provision of moorings and waterside facilities.</li> <li>• Poor transport links to Norfolk; high dependence on private transport and a lack of public transport in rural areas.</li> <li>• Undeveloped walking and cycling offer.</li> <li>• Lack of funding and human resources (paid staff and volunteers).</li> <li>• Seasonality of demand and offer.</li> <li>• Lack of diversity in visitor markets (general issue for National Parks family).</li> <li>• Protected area status resulting in greater restrictions on business activity/development.</li> </ul>



Opportunities	Threats
<ul style="list-style-type: none"> <li>• Ability to use the UK National Parks brand to raise public awareness and interest in the area's status and special qualities.</li> <li>• Enhanced use of multi-media to share visitor information.</li> <li>• Forecast growth in domestic and inbound markets.</li> <li>• Growing market interest in distinct 'Broads experiences' including wildlife, cultural heritage and active health and wellbeing.</li> <li>• Growing interest from multi-generational markets.</li> <li>• Trend of milder winters, giving potential to prolong the visitor season.</li> <li>• Private sector interest in sponsorship.</li> <li>• Interest among businesses in improving conditions for investment, including advice and training.</li> <li>• Public and business support for 'green tourism' initiatives.</li> <li>• Potential for complementary and mutually beneficial action across different interests.</li> <li>• Local communities interested in caring for the area.</li> <li>• Growth in paddle sports (SUPs &amp; kayaks).</li> <li>• Potential new international interest in area ('Masters of the Air' Apple TV series in 2024 featuring Norfolk &amp; Suffolk).</li> <li>• DMO tier changes and Norfolk LVEP bid.</li> </ul>	<ul style="list-style-type: none"> <li>• Impacts of UK economy and Brexit on costs (especially energy, food), supply chains and consumer spend.</li> <li>• Cheap international travel / package holidays especially those from countries with stronger currencies offering greater value for money.</li> <li>• Uncertainty about legacy of Covid-19 pandemic on visitor trends.</li> <li>• Impacts of climate change (e.g., flooding, drought, heatwaves).</li> <li>• Reduction in public sector funding.</li> <li>• Over-reliance on repeat visitor markets.</li> <li>• Decline in hire boat fleet and in boatyard/ boat building industry.</li> <li>• Potential loss of mooring sites and other riverside facilities.</li> <li>• Pressures on 'honeypot sites' and on protected, remote and tranquil landscapes.</li> <li>• Impacts of traffic growth on safe cycling, walking and horse-riding routes.</li> <li>• Visitor provision not meeting expected standards.</li> <li>• Labour and skills shortages within tourism and hospitality businesses.</li> <li>• Competition from other destinations.</li> <li>• Vulnerability of subsidized public transport services to and within the Broads.</li> <li>• Other barriers to social inclusion.</li> </ul>

## 4. 5-year Action Plan

Actions are set out under three integrated themes. While this is a 5-year plan, many actions will continue beyond this period.

### 4.1 Nature: Greening the Broads

Overarching aims in Broads Plan 2022-27:

- Prepare a long-term flood risk strategy for the Broads, Great Yarmouth and interrelated coastal frontage and maintain current adaptive coastal, tidal and fluvial flood risk management approaches for the area. (A1)
- Promote action to reduce carbon emissions from BA operations and from within the Broads National Park, including business, recreational, travel and other sources. (A2, A3)

**Objective 1: More local businesses have green tourism credentials, and are becoming more resilient to climate change and flood risk.**

Ref	Key actions	Resources	Targets and timescales
1.1	Strengthen Broads Green Tourism Business Scheme (GTBS) participation, incl.: <ul style="list-style-type: none"> <li>• Seek advice from <a href="#">Green Tourism</a> and from green tourism schemes run by NPAs and other organisations.</li> <li>• Explore the potential to offer a local sustainable business scheme that acts as a 'stepping stone' to accreditation.</li> </ul>	BA, VtB  VtB	Min. 25 businesses accredited or committed to 'stepping stone' scheme from 2025
	• Update and promote ' <a href="#">Greening the Broads</a> ' Guide.	BA	Publish by 2025
	• Promote individual business measures for energy and water efficiency, local and ethical purchasing, and waste management and recycling.	VtB	Ongoing activity
	• Offer training, advice and support to individual businesses on GTBS membership and <a href="#">Green Tourism</a> accreditation.	BA/ VtB	Ongoing once 'stepping stone' scheme introduced
1.2	Highlight greener options (e.g., businesses using green energy, locally sourced produce, recycled products) in tourism marketing and visitor information.	VtB, BA	Ongoing once 'stepping stone' scheme introduced
1.3	Seek partnership and funding opportunities to support green initiatives, incl. UK Government, county council, corporate and <a href="#">National Parks Partnerships</a> schemes.	BA, VtB, external funders BCT	Ongoing

Ref	Key actions	Resources	Targets and timescales
1.4	Support <a href="#">Broadland Futures Initiative</a> planning for integrated flood risk management in Broadland.	BA, VtB	Ongoing

**Objective 2: Visitors are making more sustainable travel choices to and around the Broads.**

Ref	Key actions	Resources	Targets and timescales
2.1	Provide orienteering and booking information on 'Active Travel' opportunities (e.g., walking routes, bridleways, non-powered boating trails & hire facilities, cycle routes & hire facilities).	VtB, tourism businesses, BA	Ongoing
2.2	Promote public transport options and itineraries (incl. links to destination & access points) in all tourism marketing and visitor information, and work with public transport operators to promote customer incentives.	VtB, tourism businesses, BA	Ongoing
2.3	Promote ' <a href="#">Electrifying the Broads</a> ' and other green energy options, incl. solar/electric charging point network and tourism hotspots in Electric Vehicle and Alternative Fuels strategies.	BA	Ongoing

## 4.2 Place: Valuing the National Park

Overarching aims in Broads Plan 2022-27:

- Promote the Broads National Park identity; Provide information and other resources to encourage environmentally responsible visitor behaviour; Provide safety information and support to recreational users and tourism providers. (E3, C4)
- Create and promote year-round, high quality/low impact 'experiential' itineraries, events and packages, linked into coastal and urban visitor offers. (E2)
- Increase income generation to support Broads-themed projects. (F5)

**Objective 3: The Broads National Park identity is more widely recognized and valued.**

Ref	Key actions	Resources	Targets and timescales
3.1	Promote Broads National Park brand at local and neighbouring visitor events and destinations, and in print and digital media.	BA, VtB	Ongoing

Ref	Key actions	Resources	Targets and timescales
3.2	Supply Broads National Park brand assets and guidelines to local and neighbouring visitor facing businesses and organisations.	BA, VtB	Ongoing
3.3	Maintain and continue to install Broads National Park signage and interpretation (e.g., artworks and exhibitions) at appropriate locations, incl. public transport, Discovery Hub network and hospitality venues.	BA BCT	Existing signage maintained; new signage installed as funding and locations available.
3.4	Strengthen the Broads presence within UK National Parks campaigns and project activity (e.g., calendars, newsletters, competitions).	BA	Ongoing
3.5	Support the delivery of VtB multi-media marketing and awareness campaigns	BA, VtB	Ongoing

**Objective 4: The Broads National Park and its links to the region, UK waterways and UK National Parks are well known, and there is a year-round tourism offer.**

Ref	Key actions	Resources	Targets and timescales
4.1	Support application for Norfolk Local Visitor Economy Partnership (expanded to include Suffolk).	<b>Norfolk CC, Visit Norfolk</b> , BA, VtB	LVEP application completed by end 2024
4.2	Provide multimedia Broads National Park content for marketing campaigns featuring Norfolk/Suffolk, East Anglia, UK waterways and UK National Parks (with focus on sustainable tourism, access for all, visitor itineraries and year-round tourism offer).	BA, VtB, VEE	Ongoing
4.3	Promote 'out of season' offers to visitors through blogs, newsletters and social media campaigns.	VtB, BA	Ongoing
4.4	Promote staff recruitment, training, apprenticeship and volunteering opportunities within local hospitality sector.	VtB, other local tourism businesses	Ongoing

**Objective 5: Visitors are enjoying the Broads National Park safely and responsibly.**

Ref	Key actions	Resources	Targets and timescales
5.1	Supply information, codes of conduct and other resources to guide responsible visitor behaviour (e.g., use of barbecues, accessing fragile habitats, invasive species, minimising bank erosion, recycling and litter disposal).	BA	Additional new assets created by 2025
5.2	Promote recreational access, facilities and attractions across Broads network (being aware of pressure points and environmentally sensitive sites).	VtB, BA	Ongoing
5.3	Supply targeted safety information and support to visitors through BA Ranger Service, tourism businesses, promotional activity and events.	<b>BA</b> , tourism providers, event organisers	Ongoing, min. 5 events per year

**Objective 6: More Broads-related projects and services are being supported through partnership, commercial and sponsorship funding.**

Ref	Key actions	Resources	Targets and timescales
6.1	Pursue private sector funding initiatives through National Parks Partnerships.	BA, NPP	Ongoing
6.2	Deliver projects via current public sector funded schemes (e.g., GI-RAMS) and with partners to identify new funding opportunities (e.g., Visit England funding via Norfolk & Suffolk LVEP).	<b>BA</b> , VtB	Ongoing
6.3	Run 'Love the Broads' visitor giving scheme, and Discovery Hub project and monitor progress of Broads Trust 5-year business plan (2023-2028).	<b>BCT</b> , BA, VtB	Member, volunteer and supporter base network increased and diversified. Funding secured for min. 1 major operation or project.

### 4.3 People: A landscape for all

Overarching aims in Broads Plan 2022-27:

- Increase and promote accessible and ‘taster’ activities that foster physical and mental health and wellbeing for all, including under-represented groups. (F1)
- Offer volunteering opportunities and associated skills training; provide outreach environmental opportunities for young people, using the Broads as a learning resource. (F2, F3)
- Maintain and upgrade the range and provision of integrated multi-media interpretation and ‘point of need’ information for visitors; Provide and promote annual, year-round visitor events programme. (E2, E3)

**Objective 7: More people from all walks of life are experiencing the Broads National Park for their physical and mental health and wellbeing.**

Ref	Key actions	Resources	Targets and timescales
7.1	Provide guidance and promotional materials on easier access routes, facilities and services for people with mobility or sensory needs.	BA, VtB	Ongoing
7.2	Promote accessible and affordable entry-level recreational activities.	BA, VtB, District and County Councils	Ongoing
7.3	Work with <a href="#">National Parks Partnerships</a> to develop local health and wellbeing partner initiatives, and seek advice from NPAs running relevant schemes, incl. green social prescribing and other nature-based interventions (e.g., <a href="#">Peak District Nature Prescriptions</a> ; <a href="#">South Downs Health and Wellbeing Strategy</a> )	BA (Funding Officer), NPP,	Ongoing
7.4	Create and promote information and interpretative material tailored for target audiences, incl. local urban areas (Norwich, Lowestoft, Gt. Yarmouth) and currently under-represented groups.	BA	Ongoing



**Objective 8: Visitors are getting the information they need, both before and during their visit, and information is available in multimedia, accessible formats.**

Ref	Key actions	Resources	Targets and timescales
8.1	Provide visitor information presence at TICs, yacht stations, Discovery hubs and gateway sites (e.g., rail stations), and develop initiatives to increase provision of physical information points.	BA BCT	Ongoing
8.2	Maintain and review Visit the Broads website, linked to destination websites at local to international level; maintain and increase social media presence, incl. use of influencers/ peer generated content.	BA, VtB	Website homepage reviewed by 2024/25.  Reach and dwell time of website and social media following up by 5% p.a. to 2029
8.3	Produce and expand reach of visitor newspaper (Broadcaster) and interactive tools (e.g., phone apps, TIC display touchscreens).  Increase walking and cycling route information available on third party apps and Visit the Broads website; refresh the Broads by Bike booklet and online resource.	BA, VtB	Broadcaster distribution min. 95,000 p.a.  Broads by bike refresh by March 2026  <i>VtB app targets to be agreed</i>
8.4	Curate and promote bookable events, itineraries and packages (incl. 'Broads Experiences'), e.g., for wildlife watching, arts and cultural heritage, active health and wellbeing.	BA, VtB, District and County Councils, VEE	Broads NPE collection reviewed and expanded.

## 5. Linked guiding strategies

As noted in Section 1, the Broads Recreation and Tourism Strategy sits under the **Broads Plan**. It also cross-relates to other guiding strategies produced by the Broads Authority, including the following:

- The **Broads Integrated Access Strategy** identifies actions to maintain and improve the physical access network within the Broads, linked to visitor facilities and sustainable transport.
- Through the **Broads Education Strategy**, the Broads Authority works with educational and outreach providers to connect children and young people with the Broads National Park.
- The **Broads Volunteer Strategy** aims to offer ‘hands on’ opportunities for local people, including those from disadvantaged backgrounds and underrepresented communities, to experience the Broads and play an active part in its management.

More information is available on the [strategy pages of the Broads Authority website](#).

*(End of draft document)*