

**Draft Strategy and Action Plan for
Sustainable Tourism in the Broads 2016 – 2020**
Report by Tourism and Promotion Officer

Summary: This report presents the first draft of a Strategy and Action Plan for Sustainable Tourism in the Broads, for the years 2016–2020, following the review of the strategy covering the previous five years.

Comments from Broads Forum members are invited so that these can be considered in the production of the final strategy document.

1 Background

- 1.1 The Strategy and Action Plan for Sustainable Tourism in the Broads 2011–2015 has reached the end of its five-year term. This coincides with the conclusion of the five year period for which the Broads Authority was awarded the European Charter for Sustainable Tourism in Protected Areas. The Authority is due to reapply for the Charter in 2016 and a valid strategy document forms an integral part of the application process. A strategy is necessary in any case, however, to properly inform the management of tourism in the fragile ecosystem of the Broads.
- 1.2 The Tourism Company was commissioned in September 2015, to assist with the revision and updating of the strategy. Shortage of resources within the Communications Team was a factor in the decision to bring in external consultants, but it was also considered important to ensure impartiality in the review process. The strategy is not intended as solely for the Broads Authority's use. It provides guidance for a wide range of stakeholders; any organisation or individual with an interest in (or who is affected by) tourism in the Broads area.
- 1.3 An extensive round of consultations has taken place, with a wide range of individuals and organisations. Many of these conversations were on a one-to-one basis, others by telephone and some in the form of group meetings. All available statistical evidence and survey data has been utilised and a survey of businesses was specially commissioned. Now, after considering all of the information gathered, The Tourism Company has produced a draft strategy document for further consultation.
- 1.4 Broads Authority members considered the draft strategy at the full Authority meeting on 22 January 2016.

2 Key Elements

- 2.1 The Draft Strategy identifies a vision for 2020 and three strategic objectives that are the drivers of the strategy and provide the basis for action. They are:

Vision for sustainable tourism in the Broads in 2020:

Working together effectively to provide a brilliant visitor experience of a unique National Park, delivering year round benefits to the local economy – through engaging and supporting local businesses and protecting, enhancing and celebrating the special natural and cultural heritage of the Broads.

Objective 1: Creative promotion

To raise awareness of the Broads as a unique wetland National Park based on its waterways, heritage, landscapes and wildlife

Objective 2: Captivating products

To strengthen the variety, distinctiveness and quality of the Broads tourism offer, capable of generating visits throughout the year

Objective 3: Supportive management

To stimulate and manage the flow of visitors around the Broads with consequent benefits for communities and the environment

- 2.2 In the delivery of the Strategy the Draft document has some specific recommendations. The way forward should involve the following approach:

- The relationship between Broads Tourism and the Broads Authority should be clarified and strengthened. A *modus operandi* should be agreed between the two bodies for implementation of the strategy.
- Broads Tourism and the Broads Authority should be co-signatories and owners of the strategy and action plan and it should be published in their joint names.
- The Broads Authority, as the statutory body responsible for the management and conservation of the Broads, promoting enjoyment of its special qualities and protecting the interests of navigation, and with a staff whose roles relate to the subject matter of the strategy, should be ultimately responsible for the strategy and its delivery. The Authority should strengthen its commitment to sustainable tourism, reflected at member level.
- Broads Tourism, as an independent body wholly engaged in tourism and in the Broads, should provide the overseeing vehicle that brings together the necessary stakeholder representatives.
- Broads Tourism should broaden its stated purposes to reflect the wider aims of the strategy and the needs of this special destination. It should seek to expand its membership to include a higher proportion of bodies representing local community and conservation interests.

3 Role of the Broads Authority

- 3.1 Promoting the area for tourism is an important element in the Authority's second purpose "*promoting opportunities for the understanding and enjoyment of the special qualities of the Broads by the public*". The work of the organisation in this regard has been recognised as exemplary as a Beacon Council in 2004-5 and through the European Charter awarded by Europarc. The level of National Park resources available for this activity has always been modest. Part of the challenge has always been the level of engagement and commitment by the industry to a common programme of promotional activity.

4 Broads Forum Involvement

- 4.1 Broads Forum Members represent a wide range of stakeholder organisations and interests in the Broads, many of whom may be involved directly or indirectly in delivering actions in the Broads Tourism Strategy's Action Plan. Forum members' comments are therefore invited for consideration in the production of the final strategy document.

5 Financial Implications

- 5.1 The cost of preparing the Draft Strategy and Action Plan of less than £15,000 has been funded from National Park Grant principally Planning Delivery Grant as agreed by the Broads Authority in July 2015.
- 5.2 National Park Grant funds a wide range of tourism work beyond that of the dedicated officer and a small direct budget of £12,000. Other activity includes the provision of three visitor centres and two yacht stations and a presence at Reedham Quay. The Authority also plays a significant role in promotion of and information about the Broads through publications such as Broadcaster, Eating Out Guides, Outdoors Festival, on-line platforms and more recently targeted promotion in north London and Holland.
- 5.3 Funds are limited and STEP (Sustainable Tourism in Estuary Parks) demonstrated the enhanced activity that would be possible with additional financial support. In recent times there has been success in gaining local funding for activity such as the sponsorship of Outdoors Festival and Eating Out Guides.

6 Conclusions

- 6.1 The new Draft Strategy and Action Plan is very welcome and at its heart raises the question as to how the true potential for Broads tourism can be realised.

Background papers:	Strategy and Action Plan for Sustainable Tourism in the Broads 2011 – 2015
Author:	Bruce Hanson
Date of report:	31 December 2015
Broads Plan Objectives:	TR1, TR2, TR3
Appendices:	APPENDIX 1 – Draft Strategy and Action Plan for Sustainable Tourism in the Broads 2016 – 2020



Sustainable Tourism in the Broads 2016 - 2020

**A Tourism Strategy and Destination
Management Plan for the Broads
National Park**

DRAFT

The Tourism Company
www.thetourismcompany.com

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INTRODUCTION

The Broads is a unique destination for tourism in England. In turn, tourism is a mainstay of the local economy. This strategy and action plan is about securing the best possible benefits from tourism for businesses, local communities and the environment of the Broads, as well as for all the visitors who come to enjoy this special place.

The purpose of the strategy and action plan is to guide how tourism is developed, managed and promoted in the period from 2016 to 2020. It is a document for everyone engaged with and affected by tourism in the Broads. It provides the basis for agreeing annual priorities and actions and for checking progress. This strategy and action plan builds on two previous versions, covering 2006-10 and 2011-15.

The document has been prepared to comply with VisitEngland's requirements for local Destination Management Plans and serves as the DMP for the Broads. It has also been designed to meet the requirements of EUROPARC for the European Charter for Sustainable Tourism in Protected Areas, which has been held by the Broads since 2006.

The document was commissioned by The Broads Authority and prepared by The Tourism Company, international consultants in sustainable tourism. It has been based on considerable evidence gathering and consultation including:

- Analysis of data on the volume and value of tourism
- Analysis of recent surveys of visitors, local stakeholders and boat users
- Conducting a new on-line survey of Broads tourism businesses
- Assessment of relevant national and local plans and policies
- Direct consultation with key stakeholders
- A stakeholder workshop to identify and explore together key issues and priorities

The document is in four parts, presenting

- An analysis of the current situation of tourism in the Broads
- Strategic direction for the next five years
- A framework action plan
- Structures and processes for delivering and monitoring the strategy and action plan.

Broads National Park branding

In this draft Strategy and Management Plan we are adopting the use of the brand 'Broads National Park'. The Broads has equivalent status to a National Park but, in addition to the other parks' two purposes of conservation and promoting enjoyment, it has a third equally weighted purpose of managing the navigation. As such it is defined under a different act of Parliament to the other Parks and has been known as a 'member of the National Park family'. In 2015, the Broads Authority voted to brand the area as the 'Broads National Park' to promote more clearly its national park credentials and special qualities. Although Defra was content with this decision, it is currently under legal challenge. For the purposes of this key tourism and marketing document, we are using the branding pending the outcome of the judicial review.

1 TOURISM IN THE BROADS – SITUATION ANALYSIS

This section presents the context for sustainable tourism in the Broads, considers how it has been performing and changing and identifies some key issues as identified from the consultation. It looks at how tourism services are being delivered and at the external influences which will affect the product and market prospects over the period of the strategy.

1.1 The economic, environmental and cultural context

The socio-economic condition of the area

A number of aspects of the area's social and economic profile have a bearing on the need and opportunity for tourism development.

There is a relatively low rural population of under 6,000 people within the designated area of the Broads itself. This limits the level of local demand and makes the provision of services more dependent on the visitor economy.

Norwich is a prosperous city and one of the ten fastest growing urban areas in the country, whose expansion will lead to growth in local demand for leisure and recreation and pressure on resources. The other two urban centres on the edge of the Broads, Great Yarmouth and Lowestoft, have some areas of relative economic deprivation. Initiatives such as the Business Improvement District schemes in and around Yarmouth are seeking to support more growth in the visitor economy there.

In Norfolk as a whole, while unemployment levels are generally low, so too are levels of economic productivity. Tourism already contributes around 16% of employment in the county¹. While many of the jobs it supports are full time, seasonality of tourism demand limits the ability of the sector to deliver year round employment.

The Broads environment and natural heritage

The Broads is the UK's premier lowland wetland. It is one of the most important freshwater wetlands in Europe, with many sites and areas designated internationally as well as nationally for their importance to nature conservation. The ecosystems of the Broads provide a wide range of goods and services, including tourism as one of a number of cultural services.

The quality of the natural environment as an asset for tourism lies not only in the fine wetland landscapes but also in the very rich wildlife. The fact that the Broads supports 11,000 species, accounting for 25% of the UK's biodiversity, may not be well enough known by existing or potential visitors. The quantity and variety of the birdlife alone is a highly valuable tourism resource. Recognised threats to the area's fragile environment and natural heritage should also be seen as threats to the future of tourism in the area.

¹

Economic Impact of Tourism – Norfolk 2014, Destination Research

A particular set of issues surround water, in terms of resources, quality, levels and management (including flooding), and these affect not only habitat and wildlife but also local livelihoods and tourism. Water management has been identified as a priority topic for the work of the Broads Authority during the period of this strategy.

Climate change is a major issue in this low lying coastal location, with very significant current and future implications for all activities in the Broads.

Compared to other pressures, the impact of tourism development and activity on the local environment and natural heritage has been relatively limited. However, a number of specific threats from disturbance to habitat and species, in specific locations and at certain times, require sound planning and management and a responsible approach by visitors and the sector as a whole. Examples include the Upper Thurne Catchment, where wildlife protection zones have been established through user agreements, and wildlife sensitive sites which have been identified through partnership working on the Trinity Broads. Increased visitor access to the upper reaches of rivers, primarily from extension of canoeing activity, also poses some threat.

The cultural heritage of the Broads

The Broads contains a landscape of very significant cultural value, with extensive evidence of past human settlement and landscape change. Particular elements of the cultural heritage have seen investment in their restoration and conservation in recent years.

A large number of individual sites, often small in scale, relate to the area's history of peat extraction, sedge cutting, drainage and other activities associated with the wetland environment. A particular example is the significant number of windpumps and windmills in various states of repair, access and use. A number of individual schemes have helped to restore some of these. From 2016, the Broads Landscape Partnership's Water, Mills and Marshes project, which has secured HLF funding, will provide a major new impetus to the appreciation, restoration and interpretation of this aspect of the area's cultural heritage.

Churches are a strong feature of the Broad's landscape, some of which provide access to their towers affording fine views. Some churches and other historic religious sites, such as St Benet's Abbey, have been the subject of conservation and interpretation projects in recent years.

Boating on the Broads, both for commercial reasons and for pleasure, is in itself an important part of the area's cultural heritage. The Broads' wherry fleet, which has seen considerable further restoration work since 2010, provides a special additional dimension to the cultural landscape. This sense of place enjoyed by visitors is also delivered to some extent by all sailing craft as their tall masts and sails weave through the flat countryside.

The towns and villages of the Broads are an important part of the area's built heritage and appeal to visitors, notably their water frontages including parish staithes and other waterside features. The quality of the public realm and the conservation and presentation of the built heritage varies and requires improvement in some places.

1.2 The changing Broads tourism offer

An outline of the tourism product in the Broads is provided below, noting the main changes and trends in the last five years.

The water-based product

Cabin hire motor cruisers continue to provide the basis of the traditional Broads boating holiday of a few nights to a week or, now much less commonly, a fortnight on the water. In 2015 there were 885 registered cabin hire boats (including auxiliary motor yachts) on the Broads. Trends include:

- A slow growth in numbers between 2006 and 2011, followed by a steady decline back to 2006 levels by 2015.
- Closure of some smaller and less profitable boatyards hiring cruisers.
- A general increase in the quality of cruisers, with a particular increase in larger cruisers offering high end luxury.
- Provision of a small number of cruisers using alternative environmentally friendly fuels, although demand and supply has remained quite static.

Private motor cruisers (including auxiliary motor yachts) on the Broads outnumber hire boats in a ratio of approximately 7 to 1. Their numbers have increased slightly between 2010 and 2015.

Day hire motor boats may be let for periods of one hour up to one day. In 2015, 279 day motor launches and outboards were licensed for hire, a small decrease from 2010. Some operators provide electric day boats for hire.

Sailing craft licensed for hire numbered 108 in 2015, showing a steady decline from 2010 (120) and 2006 (143). They are considerably outnumbered by private sailing craft (1,191).

Other non-powered craft, include rowing boats, canoes, punts and other small craft. 184 were licensed for hire in 2015, showing a small increase in the last five years. Ten locations are involved with the Canoe Hire Network. Additional canoe trails have been established in the last two years, giving eight in total, on both the northern and southern Broads.

Boat trips are offered by a range of different operators, using boats of varying size and providing different levels of interpretation. Ten passenger vessels were licensed in 2015, two less than in 2010. This figure may not include all trips, especially smaller vessels

Water-based activities provide an increasingly important component of the Broads offer. Sailing, rowing, canoeing and stand up paddle boarding are part of this.

Angling is a highly popular activity on the Broads, with participation reported by 43% of boat hirers², and accounting for a particular increase in bookings at the end of the closed season in mid-June. The Environment Agency have worked with Broads Angling Strategy Group to develop several projects to improve bank and boat angling access across the Broads.

² BHBF Hirers Survey, 2012

The land-based product

Serviced accommodation (hotels, inns, guest houses, B&B) is relatively limited in the area, outside of Norwich and Great Yarmouth. In 2010 it was estimated that there were around 750 serviced rooms in and around the Broads and it is unlikely that this figure will have changed significantly by 2015. While overall the quality appears to be in line with the average for the UK, there has been improvement and some establishments provide a distinctive personalised product. A small amount of investment in new or refurbished hotels has occurred or is in the pipeline.

Self-catering accommodation is quite prevalent in the Broads. This includes individual cottages or clusters of units, including barn conversions, with some new investment delivering a high quality distinctive experience. Waterfront accommodation is in demand, especially from anglers. The area contains a significant number of touring caravan and camping parks, which may also include static units, and also receives visitors from the sizeable holiday parks on the nearby coast.

Pubs, restaurants and cafés play a very important role in the Broad's offer, often in waterside locations. This has been a changing scene, with some declining and closing and others seeing significant investment and improvement in ambience and food. There have been a number of refurbishments or new developments. With support from the Broads Quality Charter, overall quality has improved but there is a remaining need for consistency and reliability. Locally produced or sourced food and drink is increasingly prevalent.

Visitor attractions add considerably to the diversity of the Broad's experience. Some are directly, sometimes loosely, based on the area's heritage and provide access to both land and water based experiences. Others offer an eclectic mixture of themes. A very small number attract considerably over 100,000 visitors per year while others are quite small. Most close out of season but a few are open all year. The number of attractions has shown some growth with a few new openings.

Nature reserves and wildlife sites can be found throughout the Broads in the ownership and management of a number of different conservation bodies as well as private landowners. These sites are highly important in providing access to the area's unique biodiversity and birdlife, especially for land based visitors. Many sites have informal access available year round and from dawn to dusk. A small number have facilities and infrastructure in place to provide a welcome to visitors, especially those seeking an introduction to the special habitats and species that characterise the Broads. Some facilities, such as visitor centres and guided boat trips, operate on a seasonal basis, while general access is available year round.

Retail, arts and craft centres range from sizeable outlets in Wroxham receiving high visitor numbers to a small but growing number of arts and crafts studios mainly in rural areas. In 2015, Norfolk Open Studios included around 50 studios within the Broads.

Walking in the Broads is largely conditioned by the rights of way network, which is quite limited in parts of the area. There are concerns over the future of permissive access which has been negotiated within agri-environment schemes with life-limited agreements. Walking conditions can be tricky, including on managed reserves, with muddy surfaces due to wetland habitats an ongoing challenge and resources for on the ground management have been reducing. While a number of short walks have

been identified and promoted the product is quite fragmented. Three longer distance routes have been named and waymarked and are maintained and promoted within the Norfolk Trails programme of the County Council.

Cycling is well suited to the flat landscapes. National Cycle Network 1 and Regional Route 30 skirt the Broads, while recent improvements in Norwich are paving the way for further connectivity. Fourteen circular cycle routes have been identified and promoted under the banner of Broads by Bike network. These are mostly on-road with limited off-road provision, but this will be extended by the proposed Three Rivers Way traffic free cycle route. Phase 1 Horning to Hoveton has recently received funding and work is due to start in January 2016. At least seven cycle hire operators are active in the Broads.

1.3 Delivery structures and activities

The main organisations involved with the delivery of sustainable tourism in the Broads are described briefly below. Between them they have been responsible for a wide range of activities in delivering the previous sustainable tourism strategy and action plan. A list of some specific activities is contained in Annex 1.

Broads Tourism is a membership body whose mission is to be 'the voice of Broads tourism businesses'. It has around 50 members, the majority of whom are tourism businesses but also include the Broads Authority, local authorities and other bodies. Broads Tourism was assigned overall responsibility for coordinating implementation of the 2011-2015 Sustainable Tourism Strategy and Action Plan. Since 2011 it has engaged in a number of activities including branding development, media work, marketing campaigns, promoting quality and environmental management amongst business, and facilitating communication and networking.

The **Broads Authority** is the statutory body with responsibility for conserving and enhancing the natural beauty, wildlife and cultural heritage of the Broads, promoting understanding and enjoyment of the area's special qualities and protecting the interests of navigation. Many of the Authority's activities contribute to the tourism in the Broads, including conservation of the area's heritage assets and provision of access, infrastructure, information, interpretation, ranger services and other management and communication activity. Delivery of sustainable tourism, including the revision of the strategy and action plan, is a strategic priority of the Authority. Specific services aimed at visitors include, amongst others:

- The destination website www.enjoythebroads.com
- A range of visitor print, including (with Broads Tourism) a promotional booklet Enjoy the Broads, and the information magazine Broadcaster
- Provision of three visitor centres at How Hill, Hoveton (both seasonal) and Whitlingham (having withdrawn from three further centres in 2011)
- Provision of guided boat trips in three centres and yacht stations in Norwich and Great Yarmouth.

A number of other bodies play a specific role in the development and promotion of tourism in the area:

- **Visit Norfolk** is a brand delivery vehicle which provides a web portal and active marketing campaign for the county, featuring the Broads as a strong component of the Norfolk offer.

- **Visit Norwich** is a membership body that promotes tourism in the city and the surrounding area, of which the Broads forms a part.
- **Greater Yarmouth Tourism and Business Improvement Area Ltd** undertakes promotions and supports projects that bring more tourism spending to Great Yarmouth Borough, which includes part of the eastern Broads.

The above three bodies are increasingly reliant on commercial activity and private sector funding raised through a range of different mechanisms.

Norfolk County Council and the **District Councils** that contain parts of the Broads provide additional services that are important for tourism, including the maintenance of access and the public realm.

A key issue for the strategy and action plan is the relationship between Broads Tourism, the Broads Authority, the other destination bodies and private sector businesses in the delivery of sustainable tourism. This is addressed in Section 3 of this document.

1.4 Tourism performance in the Broads

Volume and value of tourism

It is estimated³ that in 2013 there were approximately 6.5 million visitors to the Broads National Park, the vast majority of which were day visitors. In addition, some 0.6 m visitors were staying outside the National Park but in its 'area of influence' and a further 0.2 m were staying on private boats and 0.14 m on hire boats in the Broads. This amounted to a total of around 7.5 million visitors. Visitor numbers showed a very slight increase between 2009 and 2013 but the overall picture was essentially static.

The economic impact arising from spending by these visitors is shown in Table 1.1.

Table 1.1: Economic impact of tourism, 2013 £000s

	Staying visitor spending	Day visitor spending	TOTAL
Broads National Park – land based	52,923		
Broads National Park – hire boats	55,581		
Broads National Park – private boats	54,166		
Broads National Park – TOTAL	162,670	212,548	375,218
Broads Area of Influence	189,798	NA	189,798
OVERALL TOTAL	352,468		565,017

Source: STEAM Multi-Area Comparison 2009 - 2013

Looking only at the spending by visitors staying overnight, the above estimates suggest that within the designated area of the Broads National Park the economic impact of visitors staying in land based accommodation, on hire boats and on private boats⁴ is very roughly equivalent and totals around £163m. However, this figure is more than doubled if the spending by visitors staying in the wider area influenced by the Broads is taken into account.

³ STEAM Multi Area Comparison 2009 - 2013

⁴ Although there are seven times more private boats than hire boats, the spending generated by them is equal as hire boats are used for many more days in the year.

Spending by day visitors in the designated area of the Broads National Park is estimated at over £212m. This accounts for around 57% of total visitor spending in the National Park. Day visitor spending in the wider area of influence is not included, as it is assumed in the model that day visits, as distinct from staying visitors, to this area will not have been influenced by the Broads.

Between 2009 and 2013 there was a small decline in the economic impact of visitor spending, at constant prices, albeit with year on year fluctuations. Although the data is not strictly comparable, the trend in performance of the Broads in terms of visitor numbers and spending appears to have been broadly in line with the trend for England as a whole outside London.

Visitor flows

A census of boat movements is undertaken every four years on the Broads during three days in August, using similar methodology. The census of 2014 shows the following results, compared with 2010 where relevant:

- Total boat movements recorded were 11,933, a small increase over the 2010 figure of 11,728
- The number of motor cruiser movements (both hire and private) was lower than in 2010, but day boats were higher
- By far the greatest growth in craft on the waterway was in rowing boats and canoes, which was up by 60% on the 2010 figure
- Almost three quarters (73%) of the boat movements were on the Northern Broads. An increase in the relative proportion of traffic on the Southern Broads that had been detected in 2010 had not been sustained, with a 6% drop in movement numbers by 2014.
- Within the Northern Broads high concentrations of movements continued to be found in the traditionally popular locations such as Wroxham, Horning and Thurne Mouth.

It is difficult to relate the performance of visitor attractions to visitor flows around the Broads, because information is not comprehensive and the attractions themselves are so different. The majority of visitor attractions are located in or around the northern Broads, and include top performers (100,000+) such as BeWildewood. Quieter attractions more suited to their remote location see more modest visitor numbers. Fairhaven Woodland and Water Gardens for example receives around 30,000 visitors a year. Attractions accessible to local population centres, including Wroxham Barns, Thrigby Wildlife Park and Whitlingham Country Park, receive higher numbers of visitors. In addition to Whitlingham the other seasonal Broads Authority Visitor Centres see quite high numbers of visitors (25-40K), but with just 5-10% joining a guided boat trip at the centres. Commercial passenger vessels, such as those operated by Broads Tours, are capable of attracting significant visitor numbers (85,000 in 2014).

Performance of tourism businesses

A survey of tourism businesses in the Broads, conducted for the purposes of this strategy in 2015, enquired about their recent performance. This revealed a broadly positive or static picture, with 48% reporting growth in the past three years and 41% no change. Only 7% reported a decline.

Despite this positive situation, when asked about the need to achieve a higher turnover and more income, almost half (48%) the businesses indicated that this was essential in order to achieve viability, with a further 20% saying that this was necessary in order to obtain a reasonable profit.

One quarter were seeking more business even in July and August. Around 50% of respondents were seeking more business in April, May, June and October, while the largest proportion of respondents pointed to a particular need in February, March and November.

Visitor profiles and activities

An approximate picture of the profile of visitors to the Broads can be obtained by asking businesses about their guests⁵. The results suggest that:

- Half of visitors are couples, most of whom are in the older age brackets (over 45)
- Families with children make up around one third of the market. They are almost twice as likely to have younger children (aged 11 or under) than older children.
- Groups of friends may account for as much as 20% of visitors, but older groups (over 45) are twice as common as younger groups.

These findings suggest that the Broads may be underperforming in its ability to attract young people and segments that are most likely to be activity seekers, including young couples and groups and families with older children. Some businesses have expressed concern that they are not renewing their client base by attracting younger people who may return in the future.

Activities undertaken by visitors to the Broads are shown in Table 1.2. The figures are based on a sample of known visitors to the Broads and show the percentage who have undertaken the activity there in the last five years and the percentage who would plan to do so on a future visit.

Table 1.2 Activities in the Broads % visitors to Broads

	Have undertaken in Broads in last 5 years	Plan to undertake in Broads in future
Walking	69%	68%
Heritage site visit	35%	49%
Day boat hire	33%	45%
Bird-watching	27%	33%
Hire boat holiday	26%	41%
Cycling	22%	30%
Fishing	18%	21%
Sailing	12%	17%
Canoeing	11%	17%

Source: BA Stakeholder Survey – Visitors, 2015

The results suggest a significant potential amongst visitors to become even more engaged than they have been in the past in accessing the heritage, boating opportunities and various activities that the Broads has to offer.

⁵ It is not possible to use the 2014 survey of visitors for profiling as it uses a quota sample based on age. The information here is from the 2015 survey of tourism businesses.

1.5 Issues, challenges and opportunities identified

This section identifies a number of priority issues for tourism in the Broads based on evidence and opinion obtained from surveys and consultation.

The survey of tourism businesses enquired about perceived barriers to improved performance and growth. The greatest barrier was seen as lack of market demand, identified as very important by 43% of businesses surveyed. This was followed by ability to recruit suitable staff (33%) and increasing operating costs (28%). Regulations, planning restrictions and lack of finance were considered less important overall but are significant issues for some businesses seeking to invest.

Businesses were also asked to score a set of destination management activities in terms of their importance to their business and also how well they were being delivered in the Broads. Particular note was taken of the size of the gap between importance and delivery performance. The results are presented in Annex 2 and, together with written and verbal comments from businesses, are taken into account in the identification of key issues below.

Some survey-based evidence is available on visitor motivations and satisfaction. When visitors are asked about their reasons for visiting the Broads⁶, aspects to do with the natural environment (beautiful scenery, wildlife, tranquillity) predominate. The opportunity to go boating is also very important. In general, visitors show a high level of satisfaction with both the availability and quality of facilities in the Broads. A high proportion of visitors are on a repeat visit and show a strong propensity to return and recommend the Broads to others⁷.

A survey of public awareness and opinion of Norfolk as a destination revealed the very significant importance of the Broads to the county⁸. It showed that the Broads is better known and more popular than most other parts of Norfolk. People most likely to visit Norfolk are those who have made a previous visit. Attracting non-visitors to Norfolk presents a particular challenge. However, the Broads is well placed to deliver on the key draws identified for the county (coastal scenery and outdoor activities such as bird watching and cycling). Additional evidence suggests that the chance of visitors recommending the Broads is higher than for Norfolk as a whole⁹.

Some evidence is available on views on tourism held by local residents and private boat owners compared with those held by hire boat operators and visitors¹⁰. Average scores suggest that residents and private boat owners would on balance welcome more visitors to the Broads and believe that there is capacity for tourism growth, although on both counts they are less positive than hire boat operators or visitors.

Based on the above evidence and from the consultation undertaken with a range of interests in the Broads, a number key issues, challenges and opportunities for tourism have emerged that need to be addressed in the strategy.

⁶ Broads Authority Stakeholder Research – visitors, 2015

⁷ The 2012 survey of boat hirers found that two thirds were repeat visitors and 93% were planning to return.

⁸ Norfolk Tourism SWOT research, 2014

⁹ Broads Authority Stakeholder Research, 2015

¹⁰ Broads Authority Stakeholder Research, 2015

- The seasonality of visits**
 Tourism businesses place the highest priority on attracting more visitors to the Broads. In particular they are looking for this to be strengthened out of season, in which the area is seen as currently performing poorly.
- Web and digital presence**
 The importance of having a strong visitor-facing website for the Broads is widely recognised. There is concern that the current site, www.enjoythebroads.com is not being kept fully up to date or regularly populated with content and it is generally felt that there needs to be more dynamic digital and PR activity to stimulate interest and drive enquirers to the site.
- National Park status**
 The fact that the Broads is now able to call itself a national park presents a number of opportunities for tourism. The business survey found that 81% of tourism businesses felt that the National Park status would make the Broads more appealing to visit, with 85% believing it would benefit their business and 77% believing that more should be done to promote this status¹¹. Visitors and residents are similarly positive about the appeal of the National Park status¹². This has implications for branding, marketing and the breadth of the visitor experience expected and on offer.
- Conservation of the natural and cultural heritage**
 Tourism businesses in the Broads recognise that conservation of the area's landscape and wildlife is highly important for the future performance of their business, scoring this second out of 44 factors. It is an activity which they believe is performed well in the Broads. Some businesses directly support conservation and 83 are engaged with the 'Love the Broads' programme, started in 2012, and through this are involved in raising funds to look after the landscapes and environment of the Broads.
- Wildlife as a tourism asset**
 The appeal of Broad's wildlife, notably birds but also other species such as the butterflies and coastal seals, as an existing and potential resource for tourism has been referred to frequently by businesses and other stakeholders and is more apparent now than five years ago. It is seen as highly relevant to boosting demand out of season, especially in spring when there is an abundance of wildlife. The strong following of the BBC Spring and Autumn Watch programmes is seen as evidence of the heightened level of public interest.
- Environmental impact, climate change and greening the tourism offer**
 The impact of tourism activity on the global and local environment is an issue for many stakeholders. Participation in the Green Tourism Business certification scheme, introduced in the Broads five years ago, has been maintained but has not grown, with 18 certified businesses in and immediately around the Broads in 2015. However, 57% of respondents to the business survey stated that "minimising the negative impact of my business on the environment" was very important to them (with a further 29% saying that it was important). The need to ensure that visitor activity does not damage habitats or disturb wildlife is widely

¹¹ Figures from the 2015 business survey conducted for this strategy. The BA Stakeholder Research found a less positive response from hire boat operators.

¹² Broads Authority Stakeholder Research – visitors, 2015

accepted. Visitors show a good level of sensitivity to environmental issues and see climate change as the greatest future challenge for the Broads¹³.

- **Facilities for water-based visitors**

Tourism businesses have indicated that the provision of mooring and of facilities for water-based visitors (such as toilets, water points and waste disposal) is the area where there is the greatest gap between importance and performance. In 2012, 42% of boat hirers reported difficulty in finding a mooring, and 44% said that providing better facilities at moorings should be a high priority¹⁴.

- **Broads experiences for land-based visitors**

The difficulty faced by land-based visitors in obtaining a Broads experience continues to be recognised as a challenge. Primarily, this is about making it as easy as possible for them to access waterside sites and open wetland landscapes and, if possible, to get onto the water during their visit, through the provision of facilities, and, in particular, clear information on where to go for this experience.

- **The walking and cycling offer**

Tourism businesses have identified provision for walking as a top-ten issue of high importance but also of poor performance. Walking is the most common recreation undertaken or planned by visitors to the area, yet compared with other National Parks the Broads walking offer is relatively under developed and under exposed. While cycling relates to a much smaller market, its popularity generally is growing and more could be done to exploit the potential.

- **The quality of visitor services, notably the food offer**

While the level of visitor satisfaction with a wide range of types of facility appears to be quite high, tourism businesses and other consultees point to the need for improvement as a relatively high priority. In particular, the need to further strengthen the consistency of the food offer in pubs and elsewhere has been identified, despite recent improvements. The future of the Broads Quality Charter scheme, or finding other ways to recognise and incentivise quality, remains an issue.

- **The availability of information at point of need**

The importance of information on where to go and what to do in the Broads, post arrival, is well recognised given the relative complexity, spread and hidden aspects of the destination. Visitor information centres are now few and far between. In the light of this, businesses have identified the need assistance and encouragement to improve their knowledge to pass on to their guests.

- **Broadband and mobile phone coverage**

The flatness and rural isolation of parts of the Broads presents a challenge for digital transmission. Parts still have limited or very slow broadband and mobile phone coverage. This has become an increasing issue in recent years with rising visitor expectations of full connectivity even while on holiday. It also affects the ability of visitors to access mobile visitor information. A number of businesses see this as a major problem increasingly affecting demand.

¹³ Broads Authority Stakeholder Research – visitors, 2015

¹⁴ BHBF Hirers Survey, 2012

- **Transport access**

The completion of the dualling of the A11 has already reduced the travel time from major markets in and round London, and the planned opening of the Northern Distributor Road around Norwich in 2018 will further improve access. This is widely understood locally but a challenge remains to use these facts to alter perceptions of the Broads as a destination that is relatively hard to reach. Poor transport links have been identified as the main barrier to visiting Norfolk.¹⁵ Businesses and visitors also point to poor public transport as a weakness. However, provision is to some extent better than perception. For example, the interesting network of themed local rail services is a strength that could be built upon and Abellio Greater Anglia are involved in a number of relevant promotions.

- **Attracting new and younger markets**

The need to expand the market base for the future has been identified as a challenge by tourism businesses. The opportunity is to establish and promote experiences, offers and messages relevant to younger, more active markets and those with special interests.

- **The environment for business investment**

While the main barrier is seen as insufficient market demand, there is still a significant level of interest amongst businesses in improving other conditions for investment. Amongst businesses responding to the survey, 72% indicated that they were very or quite interested in advice and training, with a similar proportion expressing an interest in strengthening dialogue on planning policies relating to tourism development. Labour supply, including the availability of volunteers as well as paid staff, has been identified as a problem by many businesses.

- **Coordination within and beyond the Broads**

Working together was an underling principle of the previous tourism strategy and the need for this to be strengthened further has been underlined throughout the consultation. Eighty percent of tourism business in the survey were interested in networking between businesses, with 60% very interested. Similar proportions underlined the importance of businesses working with the Broads Authority. The consultation also revealed a very strong belief that there should be closer coordination between the Broads and the tourism bodies/DMOs working in the surrounding areas.

- **Lack of funding**

Lack of funding has been identified as a major issue holding back action in recent years and this may become an even greater issue. This applies particularly to core public sector funding for the improvement of infrastructure and the delivery of services. While opportunities exist for raising some external funding, for example from European programmes, there is widespread recognition of the need to adapt to a situation where public resources are increasingly scarce and private sector support for destination management and marketing becomes even more important.

¹⁵ Norfolk Tourism SWOT research, 2014

1.6 External influences on the product and market

Recent years have seen a fluctuation in the performance of tourism in the UK, with a significant growth in domestic visits and spending between 2010 and 2012 followed by a decline in 2013 and 2014 and a revival in 2015.

Inbound tourism has grown between 2012 and 2015. Much of this growth has occurred in London, providing the challenge of spreading the benefit outside the capital. While fastest proportional growth has been from emerging markets such as China, significantly the greatest volume of visits and growth has come from traditional markets in Europe and North America and this is likely to be the case for some years.

Forecasts for tourism in the UK up to 2020 point to a yearly average growth in spending of 7.1% per annum for domestic tourism, 7.9% per annum for inbound tourism and 5.3% per annum for day trips, with even faster growth between 2020 and 2025¹⁶. This may be overly optimistic and exceeds the VisitEngland target of 5% annual growth in tourism spending.

In looking at influences on the future shape of tourism, VisitEngland have identified a number of factors that will influence the market and that should be taken into consideration in the development of products and the planning of destinations. These include:

- The speed of growth in digital, mobile, tablet and social media and the use of these in sourcing and sharing tourism information and experiences.
- Demographic changes, with an increase in senior and youth markets
- Growth of 3G holidays – multi-generational holidays consisting of at least three generations, which demonstrate a demand for small group facilities
- Greater diversity of ethnic groups with different product interests
- Income inequality leading to a wider variation in holiday spending budgets (from luxury to budget)
- Increasing demand for multiple last minute short breaks
- A desire for unique and engaging experiences, including an interest in regional and local character and distinct differentiated destinations
- Consumer interest in 'doing' not just 'viewing'. This includes a growing interest in holistic, wellbeing and healthy holiday activities.

1.7 Summary SWOT analysis

The evidence obtained and presented in this section can be summed up in the following table that provides a basis for developing the revised strategy.

¹⁶ Tourism, Jobs and Growth – the economic contribution of the tourism economy in the UK. Deloitte/Oxford Economics, 2013

<p><u>Strengths</u></p> <ul style="list-style-type: none"> • A fantastic waterspace and wetland landscape of international importance • Extensive uninterrupted inland waterways with long established cruising product • Distinctive cultural heritage themes and sites associated with the landscape • Exceptional and accessible birdlife and other wildlife • Close links to varied and complementary experiences in Norwich and the coast • Range of water-based activities, especially angling and canoeing • Some individual good quality accommodation and catering operations • Some unusual and popular visitor attractions • Good rail access 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Imbalance between north and south Broads in both supply and demand • Inconsistency in quality of accommodation and catering • Lack of coordination between tourism related bodies • Poor broadband and mobile coverage • Insufficient moorings and provision of waterside facilities • Undeveloped walking and cycling offer • Lack of funding for initiatives • Insufficient human resources to undertake necessary delivery • Seasonality of demand and of the offer
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> • Ability to use National Park brand • Recent improved access to London/South East • Forecast growth in domestic and inbound markets • Growing market interest in experiences, activities and wellbeing • Growing market interest in wildlife and natural heritage • Water, Mills and Marshes HLF project • EU funding for rural development • Private sector interest in sponsorship 	<p><u>Threats</u></p> <ul style="list-style-type: none"> • Reduction in public sector funding • Over-reliance on older markets • Concentration of visitor numbers/pressure on certain areas • Labour, skills and volunteer shortage • Climate change • Damage to natural and cultural assets (including from tourism) • Lack of business support for destination bodies • Inability to coordinate between key bodies • Competition from other destinations

2 STRATEGIC DIRECTION FOR TOURISM IN THE BROADS

This section presents the overall strategic direction for tourism in the Broads from 2016 to 2020. It is informed by the analysis contained in the previous section. It starts by taking account of existing policies at different levels, with which the strategy is aligned.

2.1 The policy context

The European context

The **European Charter for Sustainable Tourism in Protected Areas** is awarded by the EUROPARC Federation. The framework and language of the Charter were revised in 2015. Its vision requires that “Sustainable tourism in European protected areas provides a meaningful quality experience, safeguards natural and cultural values, supports local livelihoods and quality of life and is economically viable”. The Charter has five principles: Giving priority to protection; Contributing to sustainable development; Engaging all stakeholders; Planning sustainable tourism effectively; and Pursuing continuous improvement.

In order to meet these principles, the Charter has two fundamental requirements:

- there is a sustainable tourism strategy and action plan for the protected area; and
- this is overseen by a structure that brings together the protected area authority, tourism businesses, and conservation and community interests.

The Charter requires that actions are taken that address ten key topics:

1. Protecting valuable landscapes, biodiversity and cultural heritage
2. Supporting conservation through tourism
3. Reducing carbon footprint, pollution and wasteful resource use
4. Providing safe access, quality facilities and special experiences of the protected area, available to all visitors
5. Effectively communicating the area to visitors
6. Ensuring social cohesion
7. Strengthening prosperity in the local community
8. Providing training and capacity building in sustainable tourism
9. Monitoring tourism performance and impacts
10. Communicating actions and engaging with the Charter.

The national context

Backing the Tourism Sector – A Five Point Plan is a policy statement issued in 2015 that reaffirms government commitment to tourism as a key economic sector. Its main thrust is to spread tourism growth and spending, especially by overseas visitors, to areas of England outside London

The **Strategic Framework for Tourism in England** 2010 – 2020 has been revised by VisitEngland in 2015. The primary purpose of the strategy is to deliver a globally competitive tourism industry that acts as a key driver of the economy and of local prosperity across England. The strategy recognises that tourism supports England’s varied natural and cultural assets and is “an enabler of enjoyable, active

and fulfilling experiences, which should be available to all, bringing strong dividends in terms of health, education and quality of life”.

One of five pillars of this growth strategy is ‘Investing in the infrastructure and environment on which tourism growth relies’. Supporting conservation and improving access in natural landscapes and heritage sites is a key action identified within this pillar. Other actions identified that are particularly relevant to tourism in the Broads include: investing in products that address the seasonality of demand; developing locally differentiated experiences; highlighting product distinctiveness in marketing; influencing planning policies to support sustainable tourism investment; increasing digital and mobile connectivity; and improving transport provision for visitors in rural areas.

The UK Government **Vision and Circular on English National Parks and the Broads**, back in 2010 called for action to make tourism sustainable, as one of the ways of fostering vibrant communities. A number of **position papers by National Parks England** have subsequently underlined the importance of National Parks as environmental and cultural assets that play a valuable role in national and local economies. Tourism and the visitor economy are seen as crucial to this, mainly delivered through small and micro businesses that should be supported. At the same time, the need to ensure protection of landscapes and wildlife is underlined.

A **Partnership Statement** between VisitEngland and National Parks England was issued in 2013, entitled ‘Delivering Sustainable Economic Growth in the Visitor Economy through England’s National Parks’. This sets out agreed partnership actions under five priorities: Building partnerships and collaboration; Supporting good destination management; Delivering sustainable visitor economy growth; Promoting England’s National Parks; and Effective implementation and use of resources.

The local context

The **New Anglia Strategic Economic Plan 2014** for Norfolk and Suffolk, produced by New Anglia LEP, sets a direction for sustainable development in the region. Central to this is policy on the green economy “seeking to maximise value and growth across the whole economy while managing natural assets sustainably”. The ‘natural capital’ basis for this brings together landscape, tourism, farming, wildlife and quality of life. Tourism is recognised as a key component of the regional economy and the Broads National Park is specifically identified as a key asset for tourism.

Local Development Strategies (LDS) have been produced in 2014 for two areas covering parts of the National Park – the Broads and Waveney Valley. They provide the basis for allocating European funding through LEADER, part of the Rural Development Plan for England (RDPE). Both strategies seek to stimulate the rural economy and grow businesses while ensuring environmental sustainability and enriching the natural and cultural assets. Both refer specifically to tourism as a priority. Each places particular emphasis on extending the season, with the Broads LDS referring to creative products, information, interpretation and support for events.

The **National Character Area Profile for The Broads**, published by Natural England in 2015, identifies and provides guidance on critical issues which could help to achieve sustainable growth and a more secure environmental future. It outlines the threats to the Broads from non-native species, variability of river flows, depleted groundwater, saltwater incursion, pollution and climate change. It presents four

Statements of Environmental Opportunity, with SEO4 specifically aimed at improving opportunities to enhance people's enjoyment of the area and protecting high levels of tranquillity by conserving the marshland and heritage that contribute to sense of place. Examples of actions to meet this include encouraging ecotourism, providing appropriate visitor experiences, managing visitor pressures, encouraging environmental management by tourism businesses, promoting walking and cycling access and conserving assets.

The **Broads Plan 2011** is the key strategic management plan for the Broads and ensures that the various challenges and opportunities are addressed in an integrated way. The Plan draws on the previous sustainable tourism strategy as part of its approach to encouraging sustainable use and enjoyment of the Broads. A new Broads Plan will be produced for 2016 and this new sustainable tourism strategy will feed into it.

The **Broads Local Plan** is the document that sets out statutory planning policies for the Broads, especially relating to the control of new development. A new Local Plan will be completed in 2016 which again will be informed by this strategy.

2.2 Aims and vision for sustainable tourism in the Broads

The World Tourism Organisation and United Nations Environment Programme define sustainable tourism as 'tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities'.¹⁷

The 2011 – 2015 strategy expressed some overlying aims for sustainable tourism in the Broads. These are considered still to be appropriate in 2015.

Primary aim:

- To develop, manage and promote the Broads as a high quality sustainable tourism destination, in keeping with its status as an internationally renowned environment.

Associated aims:

- To provide all visitors with a fulfilling and enjoyable experience of the Broads.
- To foster a prosperous tourist industry in the Broads, that provides secure year round jobs.
- To enhance the quality of life within Broads communities and support for local services.
- To increase appreciation and understanding of the special landscape, biodiversity and heritage of the Broads and support for their conservation.
- To minimise negative impacts of tourism on the environment.

The vision for 2020 reflects the key requirement to improve effective coordination in delivering the strategy, together with a widely held belief amongst all those involved with tourism and its management that the future lies in high quality visitor

¹⁷ World Tourism Organisation and United Nations Environment Programme, *Making Tourism More Sustainable* (2005)

experiences that are based on, and help to maintain, the unique qualities of the Broads.

Vision for sustainable tourism in the Broads in 2020:

Working together effectively to provide a brilliant visitor experience of a unique National Park, delivering year round benefits to the local economy – through engaging and supporting local businesses and protecting, enhancing and celebrating the special natural and cultural heritage of the Broads.

2.3 Key principles

The issues, challenges and opportunities for sustainable tourism in the Broads that were identified in Section 1 of this document, together with the key European, national and local policy directions, point to the following principles that should lie behind the strategy moving forward.

Pursuing sustainable growth

This should be a strategy for tourism growth, underpinning the performance and viability of tourism businesses across the Broads. VisitEngland's target of 5% annual growth in tourism spending should be at least matched in the Broads. However, it must follow the principles of sustainable development, taking full account of impact on the global and local environment, heritage and local communities.

Achieving more year-round visitor spending

A clear focus for marketing and product development should be to get more visitors to come in the spring, autumn and winter months. This will help tourism businesses to gain maximum economic benefit and provide more year round jobs. It will also lead to a more efficient use of resources and add a further dimension to the visitor experience of the Broads.

Prioritising conservation and environmental management

The quality of the Broads natural and cultural heritage is a key asset for tourism. This adds an economic dimension to the argument for maintaining public support for conservation. At the same time the tourism sector should recognise its responsibility for helping to conserve this asset and for minimising its own environmental impacts. This should not be an afterthought but become an accepted priority amongst tourism businesses across the area

Promoting and living up to the National Park status

The decision by Broads Authority members to use 'Broads National Park' to promote the area provides an exciting new opportunity to underpin its claim to be a leading destination for sustainable tourism in England. A principal should be to communicate this dimension of the Broads brand creatively and effectively, while also recognising the implications for delivering the rounded, quality visitor experience expected of a National Park.

Spreading benefits to all parts of the Broads

A number of parts of the Broads experience visitor congestion at certain times while others are under-visited. The imbalance between the northern and southern Broads should continue to be addressed. Exploration of lesser known areas and the fringes of the Broads should be encouraged, subject to respecting environmental limits.

Providing a National Park for all

Tourism in the Broads should be inclusive, ensuring that all potential visitors are able to enjoy a visit to the National Park irrespective of their personal circumstances, encouraged and facilitated by accessible and appropriate facilities, experiences, information and promotion.

Working in partnership

At a time of limited resources, the need for collaborative action is more apparent than ever. There is widespread opinion that the structures and processes for partnership working have not been as effective as they should have been. The new strategy and action plan should become a key tool for agreeing, coordinating and reporting on action amongst all tourism stakeholders.

2.4 Priority markets

A number of factors determine the identification of target markets for the Broads. These include:

- Fit with Broads strengths, products and location
- Growth trends and potential
- Ability to reach and influence cost-effectively
- Relevance to strategic objectives.

It is helpful to relate target markets for the Broads with those pursued for the county by Visit Norfolk, as the above factors are likely to be the same for the wider destination and the Broads plays such a strong part in the Norfolk offer. Following research undertaken in 2014, Visit Norfolk is concentrating on the domestic market, especially within a 2-hour drive time, together with London and urban areas on the eastern side of England and in the Midlands. It is keen to attract more day visitors but also to be active in converting them into staying visitors. Visit Norfolk is taking an opportunistic approach to overseas markets and promotions.

The following identification of target markets for the Broads is largely similar to that contained in the 2011- 2015 strategy as it is still relevant.

Primary target markets

- **Domestic short breaks and holidays - Couples post-family**
A flexible market. Can be high spending and prepared to travel at all times of the year on multiple trips. Empty-nesters and early retired perhaps most active. Enjoy gentle exploring, walking, cycling, nature, gardens and cultural heritage. Quality of food and service is important. Couples travelling together with others in small groups of friends are important – particularly relevant to Broads boating breaks.
- **Domestic short breaks and holidays – Families**
Currently around 30% of the market in the Broads are families with children. Fits well with boating and land-based camping, caravanning and self-catering product as well as the range of activities and attractions, including interest in wildlife. Attracting families is important for growing future loyalty to the destination. Adherence to school holidays is a disadvantage strategically, but families can be attracted for breaks out of season.

- **Day visitors**

A relatively stable market, important for generating year round business in local enterprises. Looking for attractions, activities, events, pubs, good food, places to walk and cycle, trip and day boats. Market includes:

Local residents, Norwich, East of England – year round
Coastal holidaymakers – more seasonal

Secondary target markets

- **Young independent travellers**

A flexible market. Interested in activities and experiences. Seeking a range of places to stay, from hostels and camping to quality serviced accommodation.

- **Groups**

Organised day trips and short breaks. May include a boat trip as primary draw, but also attracted by a varied programme and venues. Require catering and other facilities suitable for groups.

- **People with disabilities**

A sizeable market, especially if this includes related family/group members. Boating has appeal to people with mobility impairment and the Broads has a strong product offer.

- **Special interest**

Birdwatchers. A significant niche market. Could also be linked to Norfolk coast. Relevant to different seasons.

Anglers. Sizeable market nationally and currently within the Broads, including those hiring boats,

Sailors. The Broads has a strong competitive advantage for inland sailing compared with other destinations. Relates to the area's special qualities. Includes novice and experienced sailors.

- **Overseas visitors**

Forecast to grow faster than domestic markets. An opportunity exists to promote the Broads within Norfolk to near European markets. Also should as an adjunct to London for more extended or repeat visits.

2.5 Strategic Objectives

The aims, vision and principles behind the strategy, together with consideration of target markets, can be reflected in three strategic objectives that are the drivers of the strategy and provide the basis for action.

Objective 1: Creative promotion

To raise awareness of the Broads as a unique wetland National Park based on its waterways, heritage, landscapes and wildlife

Relates to European Charter key topics 5 and 7

This is the marketing objective. It is about articulating the Broads National Park brand and building on the opportunity it presents to create a new level of awareness and interest in the Broads. It builds on the unique character of the Broads within the family of National Parks. It requires effective promotional activity that is able to convey creatively the range of distinctive experiences available in the Broads, and which is well coordinated across all those involved in destination marketing in the area.

Objective 2: Captivating products

To strengthen the variety, distinctiveness and quality of the Broads tourism offer, capable of generating visits throughout the year

Relates to European Charter key topics 4,6,7,8

This is the product development objective. It is about delivering on the brand promise of the Broads National Park, developing a breadth and depth of product in keeping with its status which can also be used strategically to generate more year-round spending. It requires specific actions relating to different types of product and visitor experience together with actions to support investment, skills and quality improvement.

Objective 3: Supportive management

To stimulate and manage the flow of visitors around the Broads with consequent benefits for communities and the environment

Relates to European Charter key topics 1 to 8 inclusive

This is the management objective. It is about encouraging exploration and increasing visitor spending throughout the Broads and improving the overall visitor experience, while at the same time delivering sound visitor management to ensure that impacts are positive and not negative. It holds sustainability principles at its core. It requires specific actions to strengthen and deliver on the environmental credentials of the Broads National Park as a sustainable tourism destination and to further develop the positive relationship between tourism and conservation.

3 ACTION PLANNING FRAMEWORK

3.1 The framework for action 2016 - 2020

Based on the three strategic objectives, the table set out below provides a framework for action over the period of this strategy 2016 – 2020.

Its main purpose is to act as a tool for all the key tourism stakeholder bodies in the Broads to use in coordinating, delivering, reporting and monitoring actions.

From this framework, an action plan should be agreed annually which selects and develops further a limited number of priority actions to form a programme for that year.

Partners: **Bold** = Lead partner(s)

Abbreviations used in the table:

BA	Broads Authority
BHBF	Broads Hire Boat Federation
BHOs	Boat hire operators
BMF	British Marine Federation
BT	Broads Tourism
DMOs	Destination Management Organisations in and around the Broads (includes Visit Norwich, Great Yarmouth Tourism and Business Improvement Area Ltd. and others)
LAs	Local authorities
LEP	New Anglia Local Enterprise Partnership (and related services)
LOs	Landowners in the Broads
NCC	Norfolk County Council
TBs	Tourism businesses
VNfk	Visit Norfolk
WCOs	Wildlife, heritage and conservation organisations

Priority levels:

Top – High – Medium – Low

Years:

1 (2016) – 2 (2017) – 3 (2018) – 4 (2019) – 5 (2020)

Cost implications:

H High (over £20,000) – M Medium (£5,000 - £20,000) – L Low (under £5,000)

Objective 1: Creative promotion**To raise awareness of the Broads as a unique National Park based on its waterways, heritage, landscapes and wildlife**

	ACTION AREA	Priority	Year	Cost	Partners	Indicators
1.1	Maintain a high quality up-to-date destination website The visitor facing website Enjoy the Broads should be actively managed to ensure that it delivers strong images and messages, points users to practical information and specific products, and is effectively linked to other websites. <ul style="list-style-type: none"> • Review site ownership and responsibility and resources for management • Strengthen content to reflect seasons and special qualities/experiences • Ensure language motivates target markets and gives reasons to visit • Clarify coverage of standardised paid entries on site • Agree how Enjoy the Broads is to be featured on other destination websites • Maintain active management of the site 	Top	1	M-H	BA, BT, VNfk, DMOs	Site usage stats User feedback
1.2	Maintain a strong digital/social media presence and PR activity Actively maintain a visitor facing Facebook presence, Twitter account and use of other media – focussing on messages that underpin the Broads brand and strategic priorities (e.g. seasonal themes, wildlife, immediate stories, events etc.) <ul style="list-style-type: none"> • Establish a social media team for tourism in the Broads, with agreed responsibilities, coverage and protocols • Develop a communication process with tourism businesses and other local stakeholders to encourage story/message sharing and dissemination processes, including protocols and technology for use on their own websites and media feeds 	Top	1	L	BA, BT, VNfk, DMOs	Facebook metrics Number of tweets and re-tweets Take up by stakeholders
1.3	Work with others on linked marketing campaigns Destination marketing of the Broads will mainly occur through ensuring strong and appropriate featuring of the Broads in wider campaigns. <ul style="list-style-type: none"> • Ensure strong Broads coverage in domestic and overseas campaigns featuring Norfolk and East Anglia • Pursue Broads presence in generic domestic and overseas marketing of Britain's waterways • Feature the Broads in generic promotion of British National Parks 	High	1-5	H	BT, VNfk, BA, BMF, DMOs, LEP	Recorded features Response and Rol measures

1.4	Spread visibility of the Broads National Park brand identity Tourism benefits to be gained from the use of the Broads National Park brand to promote the area should be secured through ensuring that this identity is visible to all. <ul style="list-style-type: none"> • Prepare and disseminate design and use guidelines for Broads National Park branding • Clarify relationship with previous visitor-facing branding • Include Broads National Park branding in on-line and print media • Strengthen presence of Broads National Park branding on signing, especially at key gateways to the area • Promote and monitor use of the Broads National Park branding 	Med	1	L-M	BA, BT	Brand guidelines disseminated Record of take up
Objective 2: Captivating products To strengthen the variety, distinctiveness and quality of the Broads tourism offer, capable of generating visits throughout the year						
	ACTION AREA	Priority	Year	Cost	Partners	Indicators

2.1	<p>Ensure that the Broads continues to provide the UK's leading boating holiday offer</p> <p>The provision of boating holidays and the investment needed to meet, anticipate and attract future market demand is largely up to the boat yards and operators, who need to be encouraged and assisted in this where possible. However, an essential requirement is for the waterways and bankside facilities to be of appropriate capacity and of high quality. A number of different bodies have a role to play in this.</p> <ul style="list-style-type: none"> • Share knowledge of market trends in relation to Broads' strengths/capacity • Encourage engagement in quality improvements and certification • Work together to agree priority locations for new moorings and on implementing spatially specific solutions • Ensure boat users are aware of alternative mooring options • Monitor waste management arrangements at moorings and marinas and seek opportunities to improve • Improve bankside visitor facilities and information 	High	1-5	H	BA , BHOs, LOs BHBF, LAs	Boat licenses Quality grading New moorings Visitor satisfaction
2.2	<p>Promote and improve opportunities for land-based visitors to experience the Broads' special wetland environment</p> <p>The lack of visibility of the water and wetland to land-based visitors is a challenge and means that some visitors never experience the true essence of the Broads or appreciate why it has equivalent status to a National Park. This challenge needs to be further addressed through facility provision, information and promotion.</p> <ul style="list-style-type: none"> • Review the range of waterside, fen and marshland access and view points for casual visitors and identify opportunities for improvement and promotion • Collate and actively promote one-stop information on all boat-trips throughout the Broads • Promote interest and confidence in day boat hire and raise awareness of opportunities across the Broads • Further develop provision of canoe and other non-powered craft and promote/ package for less experienced visitors as well as frequent participants. 	High	2-3	L-M	BA , BT, HBOs, TBs, LAs	Information produced and disseminated Boat trip numbers Day boat, canoe, sail and other usage

2.3	Develop and package high profile wildlife experiences The potential to make far more of the wildlife experiences available in the Broads, especially outside of the summer season, is widely recognised. These should be aimed at non-specialist but interested visitors as well as bird/wildlife watchers. <ul style="list-style-type: none"> • Identify a small range of opportunities for viewing specific wildlife spectacles • Review potential impacts on species and habitats and determine capacities and approaches • Bring together wildlife and conservation organisations and interested tourism to develop and promote workable itineraries and packages • Step-up coverage and promotion of more general and accessible wildlife opportunities across the Broads 	Top	1	L	BT, BA, WCOs, TBs	Wildlife itineraries and packages created Visitor response Visitor numbers at all managed wildlife sites
2.4	Extend and diversify the walking and cycling offer Strengthening the walking and cycling product and its promotion will underpin this important dimension of the visitor expectations of a National Park, provide more environmentally friendly access, contribute to the health agenda and help to spread visitor spending. Opportunities should be provided and promoted to different users at all levels.	Top	1-2	H	BA, NCC	Numbers of circular walks promoted Lengths of traffic free cycle route Usage counts
	<ul style="list-style-type: none"> • More actively promote the three themes Norfolk Trails that include parts of the Broads • Undertake a systematic spatial study and audit of existing and potential short and extended circular and linear walks, establishing priorities for identification, maintenance and promotion • Complete the Three Rivers Way cycle route project and identify options for further traffic free provision leading to further implementation • Review and strengthen information on, and promotion of, walking and cycling opportunities, including links to public transport. 					

2.5	Strengthen access to, and interpretation of, cultural heritage themes This is important in order to add further breadth and depth to the Broads tourism offer while enhancing understanding and appreciation of aspects of the area's unique heritage. Action can be delivered over time across a range of themes and sites as opportunities arise. <ul style="list-style-type: none"> • Ensure that the tourism sector is informed about and engaged in the Water, Mills and Marshes HLF project as it is developed and implemented, leading to new opportunities for visitor access and appropriate tourism-related uses • Develop and link opportunities for increased access to, and interpretation of churches and other small historic buildings across the Broads • Support initiatives that underpin and celebrate the living cultural heritage, including traditional skills and contemporary art and crafts 	Med	1-5	L-M	BA , LAs, WCOs	Sites with new/ extended access Interpretation schemes delivered Visitor numbers
2.6	Improve the quality and distinctiveness of places to stay, eat and drink This action area is primarily in the hands of individual private businesses and their investments, operations and profitability. However, it is highly important to the overall visitor experience and success of the destination. Quality and distinctiveness can be encouraged, assisted and recognised in a number of ways. <ul style="list-style-type: none"> • Provide early, clear, practical and positive guidance and advice on planning policies relating to new investments, favouring quality and local distinctiveness • Work with local tourism businesses to identify and meet training needs • Maintain, extend and actively promote the Broads Quality Charter and other quality certification/awards 	High	1-5	L-M	BA, BT , TBs, LEP	Planning approvals Consumer generated ratings and reviews Media reviews Quality grading
	<ul style="list-style-type: none"> • Disseminate information on local produce/products for use in tourism establishments and encourage business to business networking • Identify establishments that meet quality standards in promotional material. 					

2.7	Strengthen availability of human resources and skills required by tourism-related businesses and activities The labour and skills shortage within the sector has become particularly apparent in recent years. This requires a longer term approach by the industry but some supportive actions should be considered. This is an issue for the wider area but aspects of are Broads focussed, such as the considerable need for marine engineering skills. <ul style="list-style-type: none"> • Work with tourism businesses to identify main labour and skills gaps • Identify and address training needs and delivery • Support initiatives to promote tourism-related careers to young people • Encourage awareness of, and interest in, spare time and volunteering opportunities 	Med	2-5	L	DMOs, BT, TBs, BHBf LEP, BA	Take up of vacancies Skills training places
2.8	Deliver and coordinate a year-round programme of events The programme should include a range of events in the low season to attract more visitors at these times. Events should relate to themes, products, places and activities associated with the Broads National Park brand and can be provided by a wide range of players. Where possible they should involve and benefit local communities. <ul style="list-style-type: none"> • Maintain and promote the Broads Outdoor Festival and keep it fresh • Encourage and support communities in promoting local festivals and events to visitors • Facilitate information exchange in order to schedule existing and proposed events to avoid clashes and duplication and encourage spread • Promote an events calendar/programme directly and for use by tourism businesses. 	Med	1-5	L	BT, DMOs, BA	Number and spread of events Attendance
Objective 3: Supportive management To stimulate and manage the flow of visitors around the Broads with consequent benefits for communities and the environment						
	ACTION AREA	Priority	Year	Cost	Partners	Indicators

3.1	<p>Deliver effective visitor information through a range of services and media</p> <p>Information should be available when and where visitors need it and so should be delivered flexibly and in a variety of ways. The information content should promote sustainable exploration and new experiences, picking up on the priorities of the strategy and other actions in this plan</p> <ul style="list-style-type: none"> • Maintain Broads Visitor Centres in strategic locations while monitoring their use and improving their effectiveness in influencing visitor activity • Provide information displays at entry points and other key sites (including selected railway stations) • Support delivery of Broads information in visitor centres in neighbouring areas and at appropriate local centres in the Broads • Maintain and extend events and courses to provide tourism businesses (and other local stakeholders) with information on the Broads and guidance on how to put this across to their guests • Encourage hire boat operators and other tourism businesses to continually improve information material, local itineraries etc. provided to their guests • Maintain and up-date the Enjoy the Broads information App and monitor and promote its use • Maintain and effectively distribute Broadcaster and other information print and monitor its use to enable improvement and adaptation. 	Top	1-5	M-H	BT, BA DMOs, TBs	Visitor centre use Business engagement Print distribution App usage Visitor satisfaction
3.2	<p>Strengthen the greening of the tourism offer in the Broads</p> <p>A range of actions can be taken to make tourism in the Broads more sustainable. These need to build on past initiatives, adapting them to current circumstances in order to improve response – for example by encouraging actions that are more flexible and designed to engage the interest of more stakeholders.</p>	High	1-5	L	BT, BA, LEP	Take up of green certification Businesses taking green actions and training Percentage of low carbon boats

	<ul style="list-style-type: none"> • Maintain engagement with the Green Tourism certification scheme • Provide access to training for businesses in aspects of environmental management • Encourage networking and mutual promotion between sustainability certified businesses and others that are taking similar actions • Assess trends in the supply and use of electric and other low-carbon boats and agree actions to stimulate their take up in future • Give prominence to green options and products in marketing and information 					
3.3	<p>Support the conservation of natural and cultural heritage through tourism</p> <p>The Broads has already demonstrated the positive link between tourism and conservation in generating support and awareness and this can be built upon.</p> <ul style="list-style-type: none"> • Strengthen exposure and promotion of the Love The Broads giving scheme to increase business and stakeholder engagement and numbers of visitors giving • Clearly communicate key conservation priorities and actions being taken to address them – generally across the Broads and site-specific • Ensure that Love the Broads support is informed by priority conservation issues • Encourage tourism investment that supports conservation of heritage features • Promote the use of income from tourism spending, for example on car parking or admissions, to support conservation 	Top	1-5	L	BA, WCOs, BT	Engagement in visitor giving scheme Income raised for conservation
3.4	<p>Encourage and facilitate use of public transport services by visitors</p> <p>The availability and use of public transport (bus and rail) services by visitors should be pursued for the purpose of providing access and encouraging exploration and enjoyment as well as for environmental reasons.</p> <ul style="list-style-type: none"> • Ensure public transport options are included in all marketing and visitor information • Assist tourism businesses in identifying relevant links and itineraries for guests • Work with transport operators to develop offers and promotions • Compare visitor use and needs with availability of services and seek to address identified gaps 	Low	2-5	L	BA, NCC, TOs, TBs	Percentage visitor using public transport New routes or services added

3.5	Improve broadband and mobile phone coverage While tourism is not the only reason for strengthening coverage, the importance for the sector may give impetus to the speedy completion of a comprehensive network with the required level of functionality. <ul style="list-style-type: none"> Clarify priority locations for improvement of coverage in terms of tourism need Seek to influence network development/improvement programme. 	High	1-2	(L)	BT, LEP, BA	Measures of connectivity
3.6	Improve access and the public realm at key sites and locations A number of locations exist across the Broads where there is a particular need or opportunity to improve the quality of access or amenity with consequent benefit for visitors, local residents, businesses and the environment. They require a programme of investment and improved management over time. <ul style="list-style-type: none"> Make more of the riverside in Norwich through the Wensum River Strategy and corridor initiative Address visitor and traffic congestion, amenity issues and development pressure in Wroxham and Hoveton Improve amenity around the rail and yacht stations in Great Yarmouth, recognising their role as gateways. Improve amenity and visitor management in the vicinity of Potter Heigham bridge. 	Med	1-5	H	BA, LAs	Amenities improved Visitor satisfaction Local stakeholder feedback
3.7	Provide and promote access for visitors with a range of needs Providing inclusive access and opportunities for visitors with special needs is a principle behind the strategy and should be built in to all the actions presented here. However, some specific action should also be taken in this area. <ul style="list-style-type: none"> Continue to add to access opportunities for people with a range of mobility or sensory needs Encourage the provision of visitor facilities and experiences, including boats, purposely designed for people with a range of mobility or sensory needs Provide dedicated information on opportunities for visitors with particular needs 	Med	1-5	L-H	BA, BT, DMOs, WHOs, TBs	Lengths of accessible access Number of dedicated facilities Info usage User satisfaction

3.2 Top priorities for action as of 2016

The action planning framework should be used as guidance for the five year period 2016 – 2020. Not all action areas will be able to be addressed, certainly at any one time. As stated earlier, the framework should be used as a basis for identifying and agreeing annual action plans.

The action planning framework table above suggested levels of priority against the action areas. Six action areas were identified as 'top' priority as of 2016, two under each of the three objectives. These are as follows, including some specification of particular priorities where required:

- 1.1 Maintain a high quality up-to-date destination website
- 1.2 Maintain a strong digital/social media presence and PR activity
Emphasis should be placed on messages relating to the diversity of experiences associated with the Broads National Park brand and especially activity in the spring, autumn and winter
- 2.3 Develop and package high profile wildlife experiences
- 2.4 Extend and diversify the walking and cycling offer
- 3.1 Deliver effective visitor information through a range of services and media
Priority should be given to increasing the knowledge of the Broads and its distinctive visitor experiences amongst tourism businesses and helping them in passing this on to their guests
- 3.3 Support the conservation of natural and cultural heritage through tourism
Demonstrating that practical commitment to the principles of sustainable tourism is integral to the National Park brand, by capitalising on the Love the Broads scheme, strengthening support for it and its contribution to meeting priority conservation needs.

4 DELIVERING AND MONITORING THE STRATEGY AND ACTION PLAN

This section considers the structures necessary for effective delivery of the strategy and action plan. It then identifies potential sources of funding and sets out requirements for monitoring and review.

4.1 Delivery structures, relationships and communication

Successful delivery of the strategy and action plan will require a clear structure behind it that provides leadership and enables effective coordination.

It is widely accepted across the UK and globally that effective destination management requires a partnership approach and this is one of the principles of the strategy. For tourism in protected areas the European Charter requires that a permanent forum, or equivalent arrangement, should be established between the protected area authority, local municipalities, conservation and community organisations and representatives of tourism businesses.

In most protected areas where a partnership approach of this kind has been adopted, the protected area authority has continued to play the lead role in tourism, while securing the necessary engagement of the tourism trade and wider interests through setting up a separate stakeholder group or body. This body is then responsible for bringing together a balanced group of stakeholders to oversee the sustainable tourism strategy and action plan and winning support for it and has been facilitated by the protected area authority.

In the Broads, rather than setting up a new separate overseeing body, Broads Tourism was invited to fulfil this function, with responsibility for overseeing the two previous sustainable tourism strategies and action plans. However there have been some issues with clarity of responsibility and with the capacity of Broads Tourism to perform the overseeing function, given its very limited resources.

The balance of opinion in the area is that the creation of a new body or structure would be duplicative and time consuming. It is therefore proposed that Broads Tourism should continue to be the body that provides the vehicle for stakeholder oversight of the strategy and action plan and promoting engagement with it. However, it is unrealistic to expect Broads Tourism to take overall responsibility for the strategy and action plan, and this should rest with the Broads Authority.

The way forward should involve the following approach:

- The relationship between Broads Tourism and the Broads Authority should be clarified and strengthened. A *modus operandi* should be agreed between the two bodies for implementation of the strategy.
- Broads Tourism and the Broads Authority should be co-signatories and owners of the strategy and action plan and it should be published in their joint names.

- The Broads Authority, as the statutory body responsible for the management and conservation of the Broads, promoting enjoyment of its special qualities and protecting the interests of navigation, and with a staff whose roles relate to the subject matter of the strategy, should be ultimately responsible for the strategy and its delivery. The Authority should strengthen its commitment to sustainable tourism, reflected at member level.
- Broads Tourism, as an independent body wholly engaged in tourism and in the Broads, should provide the overseeing vehicle that brings together the necessary stakeholder representatives.
- Broads Tourism should broaden its stated purposes to reflect the wider aims of the strategy and the needs of this special destination. It should seek to expand its membership to include a higher proportion of bodies representing local community and conservation interests.

In order to ensure effective implementation of the strategy and action plan a small group of key people should meet regularly to provide the necessary coordination, management and decision making, including checking on progress and planning future work.

As has been previously stated, the process of delivering the strategy should involve use of the action planning framework to agree on priorities and an annual action programme.

This will require careful dialogue with a number of organisations who will lead or be partners in some of the actions.

It is particularly important to maintain a close working relationship with the other tourism bodies in the area, especially Visit Norfolk, the neighbouring DMOs, Broads Hire Boat Federation and other interest groups and networks.

A communication process should be established with the Broads Tourism membership and with all tourism stakeholders in the Broads, to inform them of the programme and progress and encourage involvement and support.

Tourism stakeholders should be brought together at least annually in a Broads tourism conference. The conference should be invited to endorse the work on delivering the strategy.

4.2 Funding

Sources of funding for implementing the action plan, as of 2016, are limited. Potential sources can be grouped as follows:

- Core public sector funding
The Broads Authority will provide support for a number of the actions from its own budgets and programmes of work. Similarly, there should be some use of core budgets by other bodies, including seeking collateral benefit from spending on other priorities.

- **Local development funding**
The Local Action Groups for Broads and Waveney Valley administer European funding from the Rural Development Programme England. Tourism is included in each of their programmes so they should be in a position to support part of the action plan. The New Anglia LEP is also a potential source of local project funding.
- **Project funding from national bodies**
Discretionary project funding is available at certain times from various national bodies and programmes. This is often competitive. These may include programmes related to transport, the environment, National Parks, health, culture and tourism, as well as any successor to the Regional Growth Fund. Funding may be from central government departments and associated bodies, Lottery or other sources.
- **Other European funding**
Programme funding from the EU played an important part in the implementation of the 2011 – 15 strategy. Tourism, environmental management, culture and sustainable rural development are eligible for support from a range of European programmes and further applications could be considered.
- **Private sector funding**
This will be an important source of funding for the action plan. In addition to individual investments by local businesses, support could come from:
 - Buy-in to specific actions, such as marketing activity
 - Existing mechanisms for channelling business funding to projects, such as the Greater Yarmouth T-BID
 - Collateral support from private sector investment schemes (such as new development in the Norwich Growth Triangle)
 - Sponsorship, by tourism enterprises or other businesses. This should be handled transparently through an open process, providing opportunities for a range of potential sponsors without deterring engagement by other businesses in the sponsored actions.
- **Visitors**
Income may be raised directly or indirectly from visitor spending on services provided or from visitor giving schemes.

4.3 Monitoring and review

Indicators

The action plan framework identified a number of indicators for use within each action area. These are mainly output indicators. In addition, overall output and outcome indicators can be identified for more generic monitoring of tourism performance and impacts in the Broads. A short range of indicators, amended from previous strategies, is given below.

Volume and spread of tourism

- Estimates of trips, nights and spending in the region
- Visitor numbers (monthly) at attractions and main sites

- Number of boats using the Broads (Boat census).
- Traffic counts at main locations (monthly).
- Number of tourism development projects receiving planning permission.

Visitor satisfaction

- Percentage of visitors satisfied in general and with types of facility/service.
- Proportion of repeat visitors.

Tourism enterprise performance

- Monthly accommodation occupancy rates and attraction visitor numbers.
- Performance increase or decrease compared to previous year.
- Number of jobs supported – full time, part time: all year, seasonal.
- Proportion of enterprises with quality certification.
- Number of enterprises using local produce.

Community reaction

- Proportion of residents surveyed saying they are happy with tourism levels.
- Number of complaints received relating to tourism.

Environmental impact

- Records of air and water quality.
- Levels of litter in key sites.
- Number of boats electric-powered or using bio-diesel.
- Proportion of visitors arriving by public transport.
- Number of enterprises in Green Tourism Scheme or equivalent.
- Number of enterprises taking environmental management measures eg recycling.
- Proportion of sensitive wildlife areas in favourable/unfavourable condition.

Monitoring

Monitoring activity should be based on use of various data sources, a small number of regular surveys, systematic feedback processes and observation. The main components should include:

- Use of statistics on volume and value of tourism, including joint data with Visit Norfolk and the DMOs.
- Surveys of visitors to the Broads, covering profiles, activities and satisfaction
- Surveys of tourism businesses in the Broads, covering performance, needs, perceived trends, opinion etc.
- Feedback from local communities (possibly including surveys of local residents)
- Counts, checks and observation of visitor numbers and impacts.
- Records of development activity.

Review

A regular review of progress in delivering the strategy should be undertaken. This should be based on the annual action plans and their implementation. Progress should be assessed at stages during the year and reported on at least annually.

The five year strategy and action plan should be reviewed and renewed in 2020.

ANNEX 1 Activities in 2011-2015

The following list of activities are indicative and not necessarily fully comprehensive

Marketing and communications

- 'Enjoy the Broads' tourism website, developed in partnership with Broads Tourism
- 'Enjoy the Broads' smartphone app
- Refreshment and continued promotion of Britain's Magical Waterland branding work, developed in partnership with Broads Tourism
- 'Know the Broads' courses developed and offered to Broads tourism businesses
- Commercial sponsorship secured to support specific show attendance, events and publications
- Production of 'Broadcaster' and range of other publications such as 'Enjoy the Broads', 'Wild Days Out', 'How Hill', Boat Trips' etc.
- Targeted attendance at consumer travel shows (RSPB Birdfair, Telegraph Outdoor Adventure and Travel Show, London/Southampton Boat Shows)
- Engagement with Visit England and Visit Britain thematic campaigns and work with the Greentraveller and Cool Places media marketing groups
- Co-ordination of press familiarisation trips
- Promotional videos of Broads businesses
- Decision by Broads Authority members to use 'Broads National Park' for promotional and marketing purposes

Product development and enhancement

- New and improved facilities for boat users, including new and upgraded moorings and electric charging points, and refurbishment of Great Yarmouth Yacht Station
- Creation of the Broads Outdoors Festival and supporting website
- Adoption of Broads Integrated Access Strategy
- Engagement with Visit Norfolk Board COOL Tourism project enabling improved promotion of Norfolk Trails in vicinity of Broads
- Production of the 'Broads by Bike' booklet; funding secured for Phase 1 of Three Rivers Way
- Development and production of canoe trail maps and new canoe access launch and mooring facilities
- Revised Broads Angling Strategy and installation of new fishing platforms
- Continued development of the Broads Quality Charter/ 'Eating Out in the Broads'
- Refurbishment of Broads Authority Visitor Centres and feasibility study for new information building near Toad Hole Cottage
- New interpretation facilities, including 'Welcome' refurbishment/interpretation at Hoveton & Wroxham station; giant touch-screens running Broads Wildlife Explorer programme; 'Augmented Reality' smartphone interpretation for How Hill; Buttle Marsh
- Restoration of St Benet's Abbey and 1905 Wherry Yacht Hathor

Management and environmental impact

- Development and ongoing support for 'Love the Broads' visitor giving initiative
- Inspirational introductory book – 'A Green Traveller's Guide to the Broads'
- Promotion of the Green Tourism Business Scheme

- Development of the Green Boat Mark
- Strategic review of waste facilities in the Broads; monitoring of new arrangements
- Trial of water ski and wakeboarding zone on Breydon Water.

ANNEX 2 Results of the business survey 2015

About your business

3. With which of the following sectors is your business involved? *(please tick any which apply)*

4. If your business is involved in more than one sector, which do you regard as your main enterprise? *(select one)*

	3. Sectors involved (%)	4. Main enterprise (%)
Hotel	7	0
Guest House / B&B	7	9
Campsite	14	4
Caravan or holiday/home park	14	0
Group accommodation	3	0
Self-catering accommodation	38	26
Food and drink	28	26
Retail / shop	10	0
Boat repair / maintenance	7	0
Day boat hire	14	0
Holiday motor cruiser hire	10	9
Other hire business (eg cycles, row boats, canoes, sailing craft)	24	4
Visitor attraction	21	4
Tour operator	0	0
Other (please specify)	28	17

5. How many people worked in your tourism business (all sectors) in SUMMER 2015?

Full-time	17 (average)
Part-time/casual	12 (average)

6. In which year did your tourism business commence trading?

	% respondents
Pre 1950	25
1950-1999	29
2000-2004	11
2005-2009	14
2010+	21

7. Does your tourism business hold any accreditations or awards?
(Please tick all those which apply)

	% respondents
National Quality Assessment Scheme	14
Visitor Attraction Quality Scheme	14
National Accessible Scheme	0

Green Tourism Business Scheme	11
Walkers Welcome	7
Cyclists Welcome	7
Broads Quality Charter	18
Other (please specify)	18

8. Is your business a member/business partner of the Love the Broads visitor giving scheme?

Yes	57%
No	43%

9. Are you a member of any tourism association or trade organisation?

Yes	75%
No	25%

If yes, which one(s)? Please list

Broads Tourism	43%
Visit Norwich	18%
Visit Norfolk/North Norfolk/East Anglia	25%
Other	21%

Your business performance

10. Over the last three years, would you say that your business or visitor numbers have:

Declined	7%
Stayed about the same	41%
Grown	48%
My business is less than three years old	3%

11. What is your attitude to the need to achieve more turnover/income for your business?

Please select one

Essential, to achieve viability	43%
Necessary, if a reasonable profit is to be achieved	21%
Would provide welcome additional income	17%
Not particularly necessary	10%
Not sought at all, my turnover meets my current ambitions	3%

12. In which months of the year, if any, do you particularly wish to see more business?

(Please tick any months in which you wish to see more business)

January	48%
February	56%
March	56%
April	48%
May	52%
June	52%
July	26%
August	30%
September	37%

October	48%
November	59%
December	33%

13. How important are the following as barriers to improved performance and growth of your business? Please rate them from 1 to 5, where 5 = very important and 1 = not at all important.

	Very important (%)	Important (%)	Combined (%)
Planning restrictions on new development	21	11	32
Lack of financial capital	18	14	32
Ability to recruit suitable staff	32	25	57
Not enough tourists / market growth	43	18	61
Increasing operating costs	29	21	50
Regulations on business	14	18	32
Other	11	3	14

Visitor profiles

14. Roughly what percentage of your customers do you think are ...

	Average percentage reported
families with young children (<11 years)	19
families with older children (11+)	11
couples - younger (under 45)	14
couples - older (45+)	35
groups of friends - younger (under 45)	6
groups of friends - older (45+)	13
singles	3

15. Visitors to the Broads spend their time in different ways. How far does each of the following descriptions fit your customers?

1= this describes most of our customers

2= this describes some of our customers

3= this describes very few of our customers

	Most (%)	Some (%)	Very few (%)
they spend most of the time on the water making occasional visits to the land	15	35	50
they are based on the water but make regular visits to the land	8	54	38
they are based on the land but enjoy spending time on the water	31	58	12
they are based on the land and rarely, if at all, go onto the water	19	50	27

Business approach

16. Please indicate the importance to you of each of the following in the way that you operate your tourism business (on a scale of 1 to 5, where 5 = very important and 1= not at all important)

	Very important (%)	Important (%)	Combined (%)
Delivering a quality experience to my visitors	96	4	100
Minimising negative impacts of my business on the environment	57	29	86
Achieving a profitable business that can be maintained over time	75	14	89
Offering a distinctive experience of the Broads to my visitors	75	14	89
Supporting the natural and cultural heritage of the Broads	46	32	78

Improving tourism in the Broads

Listed below are a number of ways in which the Broads might be managed and promoted for economic and environmentally sustainable tourism.

1. Please indicate how well you think the Broads currently performs as a tourism destination on each issue.
2. Please indicate how important each issue is to your business.

Most important issues to business (decreasing order of importance)

Attracting visitors to the area in general
Conserving the area's landscape and wildlife
Provision of moorings
Improving quality of existing facilities for tourists
Maintaining a destination website
Provision of facilities for waterborne visitors (eg toilets/disposal/water points)
Provision for walking
Provision for sailing
Availability of places to eat and drink
Information on where to go, what to do in the Broads, post-arrival
Improving tourism operator knowledge of the Broads to pass on to guests
Provision for bird-watching
Conserving the area's built environment - heritage features
Initiatives to improve water quality
Visitor signposting

Least good performance of Broads as a destination (ascending order of performance)

Public transport provision
Attracting visitors at less busy times of year
Provision of facilities for waterborne visitors (eg toilets/disposal/water points)
Visitor signposting
Packaging of accommodation and activities in the Broads
Increasing awareness of the Broads as a destination with a land-based offer
Spreading visitors across a wider area of the Broads
Provision for water skiing
Improving range of facilities for tourists
Provision of moorings
Provision for walking
Extending and promoting quality grading of enterprises
Extending and promoting environmental accreditation of enterprises
Improving quality of existing facilities for tourists
Availability of shops and general supplies

Importance vs performance – gap (decreasing size of gap)

Provision of facilities for waterborne visitors (eg toilets/disposal/water points)
Public transport provision
Attracting visitors at less busy times of year
Visitor signposting
Provision of moorings
Improving quality of existing facilities for tourists
Provision for walking
Increasing awareness of the Broads as a destination with a land-based offer
Attracting visitors to the area in general
Improving range of facilities for tourists
Availability of shops and general supplies
Maintaining a destination website
Spreading visitors across a wider area of the Broads
Improving tourism operator knowledge of the Broads to pass on to guests
Managing the image / branding of the Broads

The Broads Authority and its involvement with tourism

21. Are you aware that the Broads has the status of a National Park?

Yes	92%
No	8%

22. Do you think the Broads Authority should do more to promote the fact that the Broads has the status of a National Park?

Yes	77%
No	23%

23. To what extent do you think that the status of the Broads as a National Park makes the area more appealing to visit, on a 5-point scale, where 1 = a lot less appealing and 5 = a lot more appealing?

A lot more appealing	62%
A little more appealing	19%
Neither more nor less appealing	15%
A little less appealing	0%
A lot less appealing	4%

24. To what extent do you think that the status of the Broads as a National Park will be of benefit to your business, on a 5-point scale, where 1 = a significant disbenefit and 5 = a significant benefit?

Significant benefit	38%
Some benefit	46%
Neither a benefit nor a disbenefit	8%
Some disbenefit	0%
Significant disbenefit	8%

25. The Broads Authority has three purposes. Please rank how relatively important you think these are.

Purpose	Most important (%)	Second most important (%)	Third most important (%)
To conserve and enhance the natural beauty, wildlife and cultural heritage of the Broads	54	21	17
To promote opportunities for the understanding and enjoyment of the Broads by the public	17	50	29
To protect the interest of navigation	33	25	42

Future engagement, co-ordination and partnership working for tourism in the Broads

27. Please indicate your interest in the following (scale of 1 to 5 where 5 = very interested and 1 = not at all interested)

	Very interested (%)	Interested (%)	Combined (%)
Opportunities for tourism businesses in the Broads to work together with each other	60	20	80
Opportunities for tourism businesses in the Broads to work together with the Broads Authority and other bodies	60	32	92
Processes for keeping tourism	60	28	88

businesses up to date on tourism issues in the Broads			
Provision of advice / training for tourism businesses	40	32	72
Dialogue on planning policies relating to business and tourism development	40	32	72

The Tourism Company
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