APPENDIX A

Broads Local Plan

Employment and Economy Topic Paper

June 2017

Contents

1. Introduction

The economy is an important element of plan-making. The NPPF identifies a need for the planning system to perform '*an economic role – contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure'*

As the new Local Plan for the Broads is produced, this report seeks to bring together primary evidence (obtained through surveys and interviews) and other relevant findings of related reports to inform the economy section of the Local Plan. Furthermore, general thoughts of stakeholders and the public have been ascertained through the Issues and Options and Preferred Options consultations and these too will be taken into account as the Economy section of the Local Plan is produced.

2. Key findings

The content of this Employment and Economy Topic paper is contained primarily in the various Appendices. This part of the report identifies the key areas, lists the Appendices and summarises what is in each one and brings out findings relevant to the Broads.

NPPG and NPPF requirements relating to the economy - Appendix A:

The National Planning Policy Practice Guide (NPPG) and National Planning Policy Framework (NPPF) set out requirements for Local Plans in relation to the economy, business and employment. Relevant parts of these documents are included at Appendix A. The following shows how the Broads Local Plan responds to these requirements:

- The Broads Authority has produced a Housing and Economic Land Availability Assessment (HELAA) (as required by the NPPG https://www.gov.uk/guidance/housing-and-economic-land-availability-assessment)
- With regards to 'ensuring the vitality of town centres'(NPPF Para 23 onwards), the Authority has produced a joint policy approach for Oulton Broad district Shopping Centre with Waveney District Council and a joint policy approach for Hoveton Town Centre with North Norfolk District Council.
- Housing and economic development needs assessments (NPPG https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments) have been produced by our constituent district Councils.
- The Local Plan has a housing target (para 47 of the NPPF).
- There is no employment target for the Broads as the evidence in the district wide studies does not require this.
- The Local Plan does not identify strategic sites for employment as the work undertaken for the entire districts does not require the Broads Local Plan to find such sites (NPPF para 21).
- The Economy, Tourism and Retail section sets out the strategy (NPPF para 21)..
- The Broads Authority does not undertake Economy Development functions; the constituent Councils undertake this function.

- The surveys completed by businesses and the interviews with some businesses have helped identify barriers and issues that businesses in the Broads tend to face (NPPF para 160).
- Retail work has been undertaken by district councils and incorporated into the Broads Local Plan in relation to Oulton Broad District Shopping Centre and Hoveton Town Centre (NPPF Para 23 onwards).
- Quantitative employment work has been undertaken by district councils and none of these studies identify a jobs target for the Broads. Qualitative work has been undertaken by the Broads Authority through surveys and interviews.

Literature Review - Appendix B:

Amongst the literature reviewed are the Economy studies produced by the Authority's six constituent Councils. These studies provide the basis for forming an economic strategy. Each district is different and therefore the needs are different. The work undertaken by our six constituent councils does not require employment land to be allocated within the Broads to meet the Council's target. The various studies show the following:

- South Norfolk, North Norfolk and Great Yarmouth economies are 'stuck' and Norwich's is 'stifled.
- The Tourism sector is important to the Broads. The Broads has a zone of influence in relation to tourism. The Tourism Strategy identifies priorities for the next five years as well as states the land and water based tourism uses in the Broads and suggest markets to target.
- Other documents are of general relevance to the Broads and need to be considered. Indeed, those documents need to ensure they consider the Broads when they are prepared and delivered.

Economic Baseline - Appendix C:
There are a variety of sources for data on the local economy and analysis has given a broad picture.

- The 2011 Census is completed every ten years and gives a baseline estimate of the population trends of the UK. According to the Census, the' top three' of each of the following economy related categories for the population of the Broads is as follows:
    - **Occupations**: Manager, professional and skills
    - **Industry**: Manufacturing, wholesale, retail and repair and human health and social work
    - **Employment:** Full time and retired
    - **Qualifications:** Degree and no qualification
- As a general summary, in terms of agriculture, it seems that holdings are fairly constant however there are some fluctuations in livestock.
- Tourism: Visitor numbers 7.4 Million, Direct spend £431 Million, Economic impact £584 Million, Jobs dependent 7,245.
- Retail and Arts, recreation and other employ the most people.
- Retail, construction and Agriculture, forestry & fishing are the sectors with the largest turnovers
- Most sectors have seen an increase in newf businesses. The sectors with more business closure than start up s are Water supply, sewerage, waste management and remediation activities, Wholesale and retail trade; repair of motor vehicles and motorcycles, Finance and insurance,

Interviews with some larger organisations which operate within the Broads -Appendix D

In order to understand the issues and barriers faced by some industries in the Broads, in June 2017, some larger organisations were met to understand the specific issues that they experience. We met with four businesses and an umbrella organisation. In general the key emerging themes were:

- Businesses understand the special qualities of the Broads;
- Some say the Broads Authority does not understands businesses, some say the Authority is very good at understanding businesses;
- Some say there is good support from the Planning teams when they apply for planning permission; and
- Generally frustrated they cannot do what they want to do without asking the Broads Authority.

Analysis of Survey of Businesses that operate within or near to the Broads - Appendix E:

In May and June 2017, businesses that operate within or near to the Broads were asked to fill out an on-line survey. Of the more than 500 businesses contacted, 64 filled out the survye, a response rate of 12.8%. This is a good response rate for this type of survey. . The full results are at Appendix E, however as a summary:

A variety of business sectors filled out the survey, but the majority seem to relate to the outdoors and use of the water. The majority of the businesses that responded have operated in the Broads for over 25 years. The vast majority of the businesses that responded employ a few people only (less than ten).

Businesses operate from a variety of premises. The most common premises of those who responded to this survey were boatyard, then office, then Industrial unit. Respondents seem to be content with the premises itself. The internet in the area is poor to average and so too is the road network although this depends on location and need. A variety of reasons are given for choosing the actual premises ranging from liking the area and cost to acquiring the property and it being near to home. Needing more space reflects the particular circumstances of the business. Some responded saying they would like more space and others are content with the size of their property.

The main reasons for a business being located within the Broads reflect historical reasons as well as being linked to the Broads experience. Some responses indicated there were no advantages to operating within the Broads. Others rely on the Broads themselves and the tourists attracted to the area. General theme of the location being attractive.

Planning rules, internet and mobile signals, the Broads Authority itself and many different organisations to deal with seem to be common issues. The ability to change the facilities was a common response and linked to this is the planning rules for the area. Better internet and support from organisations like the Broads Authority were also common suggestions. The category with the most responses was average but most were satisfied or very satisfied with operating their business in the Broads.

Generally, , the business survey indicates the following in respect of business change over the last five years:

Your workload/demand/orders…	Number
Increased	30
Decreased	3
Stayed the same	12

Your turnover…	Number
Increased	28
Decreased	5
Stayed the same	12

Your business premises…	Number
Increased	10
Decreased	0
Stayed the same	35

Your workforce…	Number
Increased	17
Decreased	2
Stayed the same	26

Your business offer…	Number
Changed	17
Stayed the same	28

Your location…	Number
moved into the Broads	1
moved away from the Broads	1
been at this location for over five years	42
moved but stayed within the Broads	2

We have…	Number
Ceased operating the business	0
Opened a branch of the business elsewhere	4
Neither of these options	41

Generally, the surveyed business predicted the following for the coming five years:

Your workload/demand/orders…	Number
Probably increase	25
Decrease	1
Stay the same	19

Your turnover…	Number
Probably increase	25
Decrease	2
Stay the same	18

Your business premises...	**Number**
Probably increase size	8
Decrease size	0
Stay the same size	37

Your workforce...	**Number**
Probably increase	14
Decrease	1
Stay the same	28

Your business offer...	**Number**
Change	16
Stay the same	27

Your location...	**Number**
move away from the Broads	1
move elsewhere but within the Broads	1
Stay where we are	43

We have...	**Number**
Cease operating the business	1
Open a branch of the business elsewhere	2
Neither of these options	40

Comments received as part of the Issues and Options consultation - Appendix F:
As part of this consultation, we asked the question: what should the Authority's approach be for redundant boatyards or boatyard buildings? The three options for consideration were:

Option 1: no change to the policy,
Option 2: Less restrictive;
Option 3: Seek to retain sites in employment use.

As a general summary, there seems to be support for the general approach taken currently, with updates to reflect National Policy as required. There was some support for allowing other uses of employment sites more generally but also retaining the sites in employment use.

Comments received as part of the Preferred Options consultation - Appendix G:

We did not include policies relating to the Economy at this stage of the Local Plan production as this report had not been completed. We did ask a general question: Do you have any further thoughts on the economy and employment needs of the Broads? As a general summary, it was considered that policies need to be flexible and able to respond to a changing economy. In relation to waterside sites and boatyards, there was emphasis on retaining the moorings and services but an acknowledgement that it is better for a building to be used rather than become derelict. There was a suggestion of a hierarchy of potential uses of a boatyard site with boat related businesses being the preference.

3. Analysis and summary

The following key issues and themes have been identified as a result of the work detailed above:

Limited access to broadband and poor internet speeds are a common theme raised in the literature review and business surveys. This is also important for the community. There is already much being done to tackle this issue in Norfolk and Suffolk. Please see the analysis in the Local Infrastructure Study[1]. In relation to the Broads Local Plan, there is a policy proposed that relates to utilities infrastructure. It provides a framework to guide the delivery of utilities infrastructure (like telecommunications related infrastructure) in a protected landscape like the Broads.

The work undertaken by our six constituent councils does not require employment land to be allocated within the Broads to meet the Council's target. As such there is no apparent jobs target for the Broads. That being said, there are general and site specific policies in the Local Plan that will help determine applications for development and change.

South Norfolk, North Norfolk and Great Yarmouth economies are 'stuck' and Norwich's is 'stifled. The Broads is located within each of these economies and whilst it may operate as a separate area in many respects, it is influenced by the characteristics of the surrounding economy. This may be illustrated by the responses to the business survey, which shows that whilst some businesses are expanding others are contracting and this variation in performance relative to the whole Broads area may be a function of more local factors.

The Tourism sector is important to the Broads. The Authority has a Tourism Strategy which was recently adopted and this will help guide tourism over the coming years. The Local Plan has a section on tourism which is in conformity with this guide and seeks to balance provision for tourism whilst protecting the special qualities of the Broads which brings people to the area in the first place.

Businesses seem to understand the special qualities of the Broads. The businesses the Authority interviewed all understood and appreciated how special the Broads is. Indeed the success of some businesses is down to these special qualities. This is pleasing to hear and it is intended that the policy framework in the Local Plan can help businesses to continue to succeed whilst protecting the special qualities of the Broads.

Some businesses say the Broads Authority does not understand businesses; some say the Authority is very good at understanding businesses. Some say there is good support from the Planning teams when they apply for planning permission. But generally frustrated they cannot do what they want to do without asking the Broads Authority. Better support from organisations like

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[1] http://www.broads-authority.gov.uk/planning/planning-policies/development/future-local-plan/evidence-base2

the Broads Authority was also suggested. The following ideas could be undertaken to help businesses that operate in the Broads. They have come about as a result of the responses to the interviews and the surveys.

There could be scope to hold business forums for businesses which operate in the Broads. These Forums could provide a planning update as well as updates from relevant Economic Development Officers or indeed the LEP. There could be thematic workshops and officers could be on hand to offer some generic planning advice.

There could be potential for a planning for businesses in the Broads guidance written in plain English, sent out annually to businesses to help them with any changes they wish to do. This would explain the process rather than give advice about proposals. This would also help householders wishing to undertake schemes.

The Authority could meet with businesses in the area to get a flavour of the types of issues they are experiencing as well as learning about successes. This could be in the form of a training session effectively run by the businesses in the Broads.

The vast majority of the businesses that responded to the survey employ a few people only (less than ten). The needs of these 'macro' sized businesses needs to be understood. It is also important to note that the Authority acknowledges that such small businesses and indeed residents of the Broads need assistance in relation to understanding and meeting the requirements of planning. The ideas discussed previously can help and so too can the various guides[2] which the Authority has produced. Furthermore, using flood risk as an example, the Authority has produced a Flood Risk Assessment Tick Sheet for minor development proposals and also a template for producing a Flood Response Plan if required[3].

Respondents to the survey seem to be content with their premises. This could be an obvious conclusion; it could be argued that if businesses were not content with their premises, they could move elsewhere. That being said, sometimes the business is located where it is for traditional reasons or to make the most of the location. There could be a need or desire to change or expand the premises. The various policies of the Broads Local Plan contain a framework to help determine such proposals.

Businesses have given a general positive picture looking to the next 5 years. This is positive and welcomed. Of course there are going to be some businesses whose future may not be so positive. This is where working with the Economic Development Officers of the Councils is important as well as the ideas suggested previously regarding working with businesses to help the Authority's understanding of businesses and indeed their understanding of planning.

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[2] http://www.broads-authority.gov.uk/planning/Planning-permission/design-guides

[3] See flood Risk SPD for these: http://www.broads-authority.gov.uk/__data/assets/pdf_file/0006/917844/Broads-Flood-Risk-SPD-Final-March-2017.pdf

There was a suggestion of a hierarchy of potential uses of a boatyard site with boat related businesses being the preference. There was some support for allowing other uses of employment sites more generally but also retaining the sites in employment use. It is clear that some businesses would like to be able to do more on their site and such changes can make businesses more viable and successful. That being said, the businesses also appreciate the special qualities of the Broads, so a balance does need to be struck and that is what the policy approach of the Local Plan seeks to do.

Appendix A: NPPG and NPPF requirements relating to the economy.

Generally, the NPPG refers to the following. As these sections are quite long, they have not been copied over, but the link added.

- Housing and Economic Land Availability Assessment (HELAA) https://www.gov.uk/guidance/housing-and-economic-land-availability-assessment
- 'Ensuring the vitality of town centres' https://www.gov.uk/guidance/ensuring-the-vitality-of-town-centres
- Housing and economic development needs assessments https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments

The following are the relevant references in the NPPF (https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/6077/2116950.pdf).
NPPF 7 refers to '*contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure'.*

NPPF17 says '*proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities'*.

NPPF21 says '*In drawing up Local Plans, Local Planning Authorities should:*

- *set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;*
- *Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;*
- *support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;*
- *plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;*
- *identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and*
- *facilitate flexible working practices such as the integration of residential and commercial uses within the same unit'.*

NPPF28 says that '*Planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development. To promote a strong rural economy, local and neighbourhood plans should:*

- *support the sustainable growth and expansion of all types of business and enterprise in rural areas, both through conversion of existing buildings and well designed new buildings;*
- *promote the development and diversification of agricultural and other land-based rural businesses;*
- *support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside. This should include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres; and*

- *promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship'.*

The Business section of the NPPF says:
160. 'Local Planning Authorities should have a clear understanding of business needs within the economic markets operating in and across their area. To achieve this, they should:

- *work together with county and neighbouring authorities and with Local Enterprise Partnerships to prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market; and*
- *work closely with the business community to understand their changing needs and identify and address barriers to investment, including a lack of housing, infrastructure or viability.*

161. Local Planning Authorities should use this evidence base to assess:

- *the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;*
- *the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land;*
- *the role and function of town centres and the relationship between them, including any trends in the performance of centres;*
- *the capacity of existing centres to accommodate new town centre development;*
- *locations of deprivation which may benefit from planned remedial action; and*
- *the needs of the food production industry and any barriers to investment that planning can resolve'.*

The NPPF defines economic development as *' Development, including those within the B Use Classes, public and community uses and main town centre uses (but excluding housing development)'.*

Appendix B Literature Review

The following documents have been produced by various organisations, but all have relevance to some extent to the Broads. This section summarises the documents briefly.

a) ***Sustainable Tourism in the Broads 2016 – 2020***[4]

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 water-based product

- Cabin hire motor cruisers
- Private motor cruisers
- Day hire motor boats
- Sailing craft licensed for hire
- Other non-powered craft, include rowing boats, canoes, punts and other small craft.
- Boat trips
- Water-based activities provide an increasingly important component of the Broads
- offer. Sailing, rowing, canoeing and stand up paddle boarding are part of this.

The land-based product

- Serviced accommodation (hotels, inns, guest houses, B&B
- Self-catering accommodation
- touring caravan and camping parks
- Pubs, restaurants and cafés play a very important role in the Broad's offer, often in waterside locations.
- Visitor attractions add considerably to the diversity of the Broads experience.
- Nature reserves and wildlife sites can be found throughout the Broads
- Retail, arts and craft centres
- Walking
- Cycling is well suited to the flat landscapes.

Volume and value of tourism

It is estimated 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

[4] http://www.broads-authority.gov.uk/__data/assets/pdf_file/0012/769773/Sustainable-Tourism-in-the-Broads-2016-20-May-2016.pdf

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. 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.

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. Sustainable Tourism in the Broads 2016 – 2020 The Tourism Company 9 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, with 50% seeking more business in April, May, June and October. The largest proportion of respondents pointed to a particular need in February, March and November

Issues, challenges and opportunities identified

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

- Internationally protected wildlife sites
- The seasonality of visits
- Web and digital presence
- National Park status

- Conservation of the natural and cultural heritage
- Wildlife as a tourism asset
- Environmental impact, climate change and greening the tourism offer
- Facilities for water-based visitors
- Broads experiences for land-based visitors
- The quality of visitor services, notably the food offer
- The availability of information at point of need
- Broadband and mobile phone coverage
- Transport access
- Attracting new and younger markets
- The environment for business investment
- Coordination within and beyond the Broads
- Lack of funding

SWOT Analysis

Strengths	Weaknesses
• A fantastic waterspace and wetland landscape of international importance • Extensive uninterrupted inland waterways with long established boating product, including motor cruisers and yachts for hire and river trips • 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	• 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
Opportunities	**Threats**
• 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	• 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

Primary target markets

- Domestic short breaks and holidays - Couples post-family A flexible market.
- Domestic short breaks and holidays – Families
- Day visitors A relatively stable market, important for generating year round business in local enterprises

- Overseas visitors Forecast to grow faster than domestic markets.
- Young independent travellers A flexible market.
- Groups Organised day trips and short breaks.
- People with disabilities
- Special interest Birdwatchers.

Key principles

- Pursuing sustainable growth
- Achieving more year-round visitor spending
- Focussing on conservation and environmental management
- Promoting and living up to the National Park status
- Spreading benefits to all parts of the Broads
- Providing a National Park for all
- Working in partnership

b) Broads Plan2017[5]

The Broads Plan is the Management Plan for the Broads and was adopted in 2017. The Broads Plan is the single most important strategy for the Broads. It sets out a long-term vision for the area, and shorter-term actions to benefit the environment, local communities and visitors. As a high level, overarching document it draws together and guides a wide range of partnership plans, programmes and policies relevant to the area. The Broads Plan is reviewed and updated on a regular basis. This plan covers the period 2017-2022. There are elements of the plan that relate to businesses, employment and the economy and these are as follows:

- The hire boat industry, while experiencing a gradual decline in boat numbers since 2010, remains a significant part of the Broads economy.
- Angling is another major contributor to the local and regional economy, and the Broads offers some of the best coarse fishing in England.
- One long term aim is that the hire boat industry, while experiencing a gradual decline in boat numbers since 2010, remains a significant part of the Broads economy.
- Another long term aim is that angling is another major contributor to the local and regional economy, and the Broads offers some of the best coarse fishing in England.
- 'Climate smart' planning and action is helping to retain the beauty and value of the Broads as a special place of high quality landscape, wildlife and heritage that provides people with opportunities
- for recreation, learning, wellbeing, employment and economic sustainability is another aim.
- Tourism is a major product in the local economy of the Broads National Park and wider economy of the East of England, bringing in nearly £600m a year and supporting more than 7200 jobs (full-time equivalent). The attractions of the Broads also recognise the significant appeal of the surrounding area. This includes the historic city of Norwich, the bustling market towns of Beccles and Bungay in the Southern Broads, the popular seaside resorts of Great Yarmouth and Lowestoft, and the sweeping stretches of the North Norfolk coast, part of which is designated as an Area of Outstanding Natural Beauty.
- Globalisation, new legislation and management expectations are putting pressure on farming businesses, and many have to diversify to survive.

[5] http://www.broads-authority.gov.uk/__data/assets/pdf_file/0012/976728/Broads-Plan-2017.pdf

c) ***Valuing England's National Parks. Final Report for National Parks England. May 2013***[6]

This report seeks to present the latest economic and socio-economic data relating to the National Parks, to assess the contribution of National Parks to economic prosperity and well-being, and to identify future opportunities for National Park Authorities to further support sustainable rural economies in partnership with local communities, businesses and local government partners.

The following is the economic profile of the Broads. We note that this was produced in 2013, but it still provides an interesting analysis of the economy of the Broads.

The Broads

The Broads are a wetland, a network of rivers, lakes and fens in Norfolk and Suffolk in the East of England of international significance and a member of the National Park family. The Broads is a small area compared to other English National Parks, covering an area of approximately 30,000 hectares. The local area also has a relatively low population density of 0.21 persons per hectare, which is slightly lower than the average of 0.26 across the English National Parks.

Population and age profile
The Broads has a relatively small population of approximately 6,300, according to the latest Census data. The data in Table A1.1 show that the local population is very much an ageing population, with a larger proportion of people aged 60 and over (40%), compared to those aged younger than 45 (36%). Across the English National Parks as a whole there are more people aged under 45 (44%) than aged 60 and over (33%), while the national average has 59% aged under 45 and just 23% aged 60 and over.

Table A1.1 – Population of the Broads by Age Group, 2011

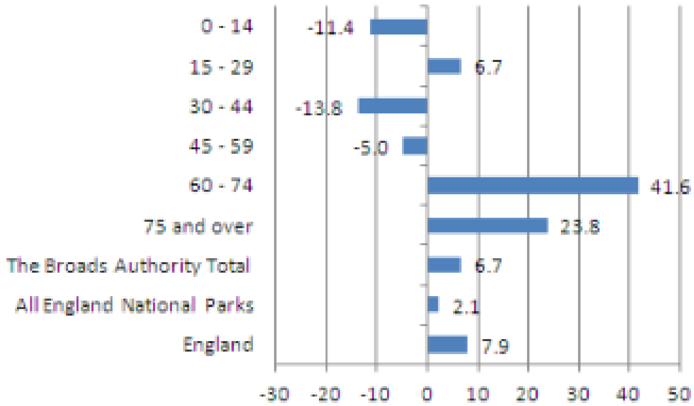
	The Broads		All England National Parks	England
Age 0 to 14	655	10%	16%	19%
Age 15 to 29	778	12%	12%	19%
Age 30 to 44	892	14%	16%	21%
Age 45 to 59	1,451	23%	23%	19%
Age 60 to 74	1,672	27%	22%	15%
Age 75+	823	13%	11%	8%
Total	**6,271**	**100%**	**100%**	**100%**

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

[6] http://www.nationalparksengland.org.uk/__data/assets/pdf_file/0004/717637/Valuing-Englands-National-Parks-Final-Report-10-5-13.pdf

Figure A1.1 shows that the Broads population has experienced strong growth of 6.7% between 2001 and 2011, according to Census data. This is the second strongest growth rate of all English National Parks and, although slightly lower than the 7.9% population growth across England as a whole, is significantly higher than the average across all English National Parks (of 2.1%). However, the local population has become more aged over time, with significant declines in the number of people aged younger than 60 and significant growth amongst those aged 60 and over.

Figure A1.1 – Population Change in The Broads, 2001 to 2011



Source: ONS (2013) Characteristics of National Parks, 2011; Census 2001 and 2011 data

Economic activity
The latest Census data suggest that The Broads has a relatively small 'working age' population of approximately 4,700 people. The data in Table A1.2 also show that the local rate of economic activity (65%) is significantly lower than the National Park and England averages of 70%, due to relatively low rates of part time, full time and self

employment. Unemployment is also slightly higher than the wider National Park average, although it remains lower than the national average of 4%. Corresponding rates of economic inactivity are therefore higher than average, due primarily to the large number of retired people.

Table A1.2 – Economic Activity in the Broads, 2011

	The Broads		All England National Parks	England
Working Age Population (aged 16-74)	**4,732**	**100%**	**100%**	**100%**
Economically Active	**3,077**	**65%**	**70%**	**70%**
Part-time employees	618	13%	14%	14%
Full-time employees	1,464	31%	32%	39%
Self-employed	773	16%	19%	10%
Unemployed	141	3%	2%	4%
Full-time student	81	2%	2%	3%
Economically Inactive	**1,655**	**35%**	**30%**	**30%**
Retired	1,143	24%	19%	14%
Student	123	3%	4%	6%
Looking after home or family	149	3%	4%	4%
Long-term sick or disabled	167	4%	2%	4%
Other	73	2%	2%	2%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Occupational profile
Table A1.3 shows that there are almost 3,000 employed people living in The Broads, including a relatively large number of managers, directors and senior officials. In contrast, there are relatively few people with professional and elementary occupations compared to both the National Park and national averages.

Table A1.3 – Occupations of residents in The Broads, 2011

	The Broads		All England National Parks	England
Employed residents (aged 16-74)	**2,925**	**100%**	**100%**	**100%**
Managers, directors & senior officials	529	18%	16%	11%
Professional occupations	480	16%	20%	17%
Associate professional & technical occupations	322	11%	11%	13%
Administrative & secretarial occupations	299	10%	9%	11%
Skilled trades occupations	421	14%	16%	11%
Caring, leisure & other service occupations	263	9%	8%	9%
Sales & customer service occupations	162	6%	5%	8%
Process, plant and machine operatives	174	6%	5%	7%
Elementary occupations	275	9%	10%	11%

Source: ONS (2013) Characteristics of National Parks, 2011; and Census 2011 data

Household income
The 2010 Defra economic profiles suggested that the average gross income of households on The Broads was £35,341 in 2009/10[69]. This was the fourth highest of all English National Parks but was also significantly lower (-6.1%) than the average household income for the East of England region.

House prices
The Defra economic profiles also estimated, based on 2009 Land Registry sales data, that the average house price on The Broads was almost £285,000 (which was fairly average across the English National Parks) but almost a third higher (32%) than the average house price in the East of England at the time.

Number of businesses

The latest IDBR data record that there were approximately 170 businesses[70] operating from 185 establishments (local units) in The Broads in 2012. These numbers have remained relatively stable since 2009. The data in Table A1.4 show that the large majority of businesses and establishments in The Broads has fewer than ten employees, which is consistent with the other English National Parks and the national average.

Table A1.4 – Businesses and Establishments in the Broads by Size, 2012

Businesses	**The Broads**		**All England National Parks**	**England**
0-9 employees	150	88%	91%	89%
10-49 employees	15	9%	8%	9%
50-249 employees	5	3%	1%	2%
250+ employees	0	0%	0%	0%
Total	**170**	**100%**	**100%**	**100%**
Establishments (Local units)				
0-9 employees	160	86%	88%	83%
10-49 employees	20	11%	10%	14%
50-249 employees	5	3%	1%	3%
250+ employees	0	0%	0%	0%
Total	**185**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Table A1.5 shows the distribution of businesses by sector. The numbers are very small for The Broads but show a concentration of businesses in 'agriculture, forestry and fishing', 'retail' and 'professional, scientific and technical' sectors. These sectors account for around 45% of local businesses, which is similar to the other English National Parks but higher than the national average. The data also reveal a relatively large number of businesses in the 'retail', 'transport and storage', 'property', 'business administration and support services', and 'arts, entertainment, recreation and other services' sectors compared to the other National Parks and the national average. In contrast, the number of local businesses in 'manufacturing', 'motor trades', 'information and communication', 'finance and insurance' and 'education' sectors is relatively low.

Table A1.5 – Businesses in The Broads by Sector, 2012

Businesses	**The Broads**		**All England National Parks**	**England**
Agriculture, forestry & fishing	35	21%	24%	5%
Production	5	3%	5%	6%
Construction	15	9%	10%	12%
Motor trades	0	0%	2%	3%
Wholesale	5	3%	3%	5%
Retail	20	12%	7%	9%
Transport & Storage (inc. postal)	10	6%	2%	3%
Accommodation & food services	15	9%	9%	6%
Information & communication	0	0%	5%	8%
Finance & insurance	0	0%	1%	2%
Property	10	6%	3%	4%
Professional, scientific & technical	20	12%	13%	17%
Business administration & support services	15	9%	6%	7%
Public administration & defence	0	0%	0%	0%
Education	0	0%	2%	2%
Health	5	3%	3%	4%
Arts, entertainment, recreation & other services	15	9%	6%	7%
Total	**170**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Employment

Employment in The Broads has grown by almost 11% between 2009 and 2012. The 170 local businesses in The Broads provided employment for approximately 2,000 people in 2012. This suggests that the average business employed 11.5 people in 2012. Much of the local employment data in Table A1.6 has been suppressed due to the small number of local businesses, but it does suggest a relatively high proportion of employees in The Broads work for businesses employing between 10 and 49 people compared to the other National Parks and the national average.

Table A1.6 – Employment in the Broads by Size of Business, 2012

	The Broads		**All England National Parks**	**UK**
0-9 employees	..C	..C	35.1%	14.1%
10-49 employees	399	20.4%	19.1%	13.9%
50-249 employees	..C	..C	5.3%	12.9%
250+ employees	..C	..C	17.6%	59.0%
Total	**1,960**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Broads and England National Park figures do not sum to the totals.

Similarly, much of the sectoral employment data has been suppressed in Table A1.7. The disclosed data suggest a particularly high level of local employment in the 'arts, entertainment, recreation and other services' sector, which accounts for 15% of employment in the Broads, compared to 5% across the other National Parks and 4% across the whole of the UK.

Table A1.7 – Employment in the Broads by Sector, 2012

	The Broads		**All England National Parks**	**UK**
Agriculture, forestry & fishing	142	7.2%	9.6%	0.9%
Production	..C	..C	5.9%	10.2%
Construction	..C	..C	4.9%	4.5%
Wholesale & retail (inc. motor trades)	..C	..C	11.7%	16.5%
Transport & Storage (inc. postal)	..C	..C	1.6%	4.2%
Accommodation & food services	..C	..C	14.7%	6.4%
Information & communication	..C	..C	2.0%	3.9%
Finance & insurance	..C	..C	0.1%	3.9%
Property	19	1.0%	2.3%	1.6%
Professional, scientific & technical	..C	..C	5.0%	6.3%
Business administration & support services	94	4.8%	3.9%	8.1%
Public administration & defence	0	0.0%	0.0%	4.0%
Education	..C	..C	15.6%	12.9%
Health	..C	..C	10.9%	12.5%
Arts, entertainment, recreation & other services	288	14.7%	5.2%	4.1%
Total	**1,960**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Broads and England National Park figures do not sum to the totals.

Alternative employment estimates have been produced in Table A1.8 based on 2011 data from the Business Register and Employment Survey (BRES). In this case the 'Broads' area is defined as covering all the lower super output areas (LSOAs) which had some part, however small, in The Broads area, rather than focusing only on the LSOAs where more than half of the population falls in The Broads area. This has a significant impact on the total level of employment associated with The Broads, which increases to more than 140,000 jobs. The proportion of jobs in 'agriculture, forestry and fishing' and 'arts, entertainment, recreation and other services' falls significantly when adopting the larger area, which then becomes more closely matched to the UK average than the other national parks.

Table A1.8 – Employment in the Broads by Sector based on BRES data, 2011

	The Broads	
Agriculture, forestry & fishing	195	0.1%
Production	12,510	8.9%
Construction	6,429	4.6%
Wholesale & retail (inc. motor trades)	27,715	19.8%
Transport & Storage (inc. postal)	4,864	3.5%
Accommodation & food services	10,409	7.4%
Information & communication	3,873	2.8%
Finance & insurance	5,903	4.2%
Property	2,586	1.8%
Professional, scientific & technical	8,516	6.1%
Business administration & support services	14,669	10.5%
Public administration & defence	8,795	6.3%
Education	12,598	9.0%
Health	12,810	9.1%
Arts, entertainment, recreation & other services	8,282	5.9%
Total	**140,154**	**100.0%**

Source: BRES (2011 data), accessed via NOMIS on 17 April 2013

Turnover and GVA

The IDBR data estimate that the 170 local businesses generated a combined annual turnover of approximately £114 million in The Broads in 2012. This equates to an average turnover of £59,500 per employee, which is considerably lower than the English National Park and UK averages of £68,000 and £167,000 per employee respectively. Although much of the data in Table A1.9 is suppressed it again shows a relatively high turnover amongst businesses in The Broads with between 10 and 49 employees compared to the national average.

Table A1.9 – Turnover (£m) in The Broads by Size of Business, 2012

	The Broads		All England National Parks	UK
0-9 employees	..C	..C	37.9%	12.6%
10-49 employees	21.1	18.5%	32.2%	11.6%
50-249 employees	..C	..C	5.1%	13.6%
250+ employees	..C	..C	4.6%	62.2%
Total	**114.3**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Broads and England National Park figures do not sum to the totals.

The unsuppressed data in Table A1.10 shows a relatively high turnover in the primary (agriculture, forestry and fishing) sectors and business administration and support services sector in The Broads, compared to the other English National Parks and the UK average.

Table A1.10 – Turnover (£m) in The Broads by Sector, 2012

	The Broads		All England National Parks	UK
Agriculture, forestry & fishing	19.1	16.8%	7.8%	0.8%
Production	..C	..C	9.6%	15.9%
Construction	..C	..C	7.1%	4.4%
Wholesale & retail (inc. motor trades)	..C	..C	17.2%	24.6%
Transport & Storage (inc. postal)	..C	..C	1.7%	3.3%
Accommodation & food services	..C	..C	9.2%	1.7%
Information & communication	..C	..C	2.4%	4.1%
Finance & insurance	..C	..C	1.0%	27.3%
Property	1.1	1.0%	1.9%	1.1%
Professional, scientific & technical	..C	..C	5.2%	4.7%
Business administration & support services	6.0	5.3%	4.0%	3.6%
Public administration & defence	-	0.0%	0.2%	0.6%
Education	..C	..C	4.0%	1.7%
Health	..C	..C	7.4%	3.6%
Arts, entertainment, recreation & other services	..C	..C	3.0%	2.7%
Total	**114.3**	**100%**	**100%**	**100%**

Source: ONS (2013) UK Business: Activity, Size and Location, 2012 and additional analysis of IDBR data

Note(s): '..C' shows where data has been suppressed so that they do not reveal the identity of any individual or business. As a result of this, the Broads and England National Park figures do not sum to the totals.

GVA has been estimated for The Broads using the three different approaches described in Section 2. Unfortunately, the relatively high levels of suppressed data in the above turnover and employment data mean that the GVA estimates based on turnover and employment are likely to underestimate the true level of GVA in The Broads, while the GVA estimates based on county level productivity are likely to over-estimate GVA because of the concentration of agricultural activity in the Broads. These estimates suggest that the businesses in The Broads generated GVA of between £11 and £83 million per annum in 2012. However, if the GVA estimates are based on the higher level of employment (associated with all LSOAs which had some part in The Broads area) the estimate of GVA could be as high as £6 billion.

d) The Making of an Industrial Strategy – Localis 2017 [7]

Localis are an independent, cross-party, leading not-for-profit think tank that was established in 2001. The work promotes neo-localist ideas through research, events and commentary, covering a range of local and national domestic policy issues. This particular piece of research relates to the economy of the country.

The stifled and the stuck. Our research also identifies two sets of places which require special intervention in the industrial strategy. Firstly, the places that are growing quickly but whose growth is restricted by their boundaries are the stifled. Our research suggests these are the places that are successfully reorienting their economies based on demographic and economic trends. They are fast growing, with associated growing pains, but are often stymied by their administrative boundaries. They need the power to grow. Secondly, the places that are still dealing with the fallout of the industrial trauma of the 1980s are the stuck. Our research suggests these are the thirty most structurally challenged local economies in England, which perform poorly on multiple indicators, both long term demographic trends and more immediate short term economic performance. They are penumbra economies that have not recovered from the 1980s. They have weak labour markets and much of the growth experienced in the past few decades has been in poorly-paid and insecure sectors such as retail. Many have attracted a great deal of investment from central government and

[7] http://www.localis.org.uk/wp-content/uploads/2017/03/004_Localis_IndustrialStrategy_AWK_WEB-1.pdf

the European Union, but structural issues persist. Local council's political make-up is often multi-party coalitions or, at the other end of the scale, 'one party states'. Greater top-down intervention is required, focused on building local capacity in leadership and skills.

Great Yarmouth, South Norfolk and North Norfolk are in the top 30 structurally weakest economies in England and classed as Stuck. Norwich is classed as stifled.

e) ***Building our Industrial Strategy Green Paper (consultation ended April 2017)***[8]

This green paper sets out the Government's approach and some early actions they have committed to take. The objective of our modern industrial strategy is to improve living standards and economic growth by increasing productivity and driving growth across the whole country. We identify 10 pillars we believe are important to drive forward our industrial strategy across the entire economy: science, research and Summary 10 Building our Industrial Strategy innovation; skills; infrastructure; business growth and investment; procurement; trade and investment; affordable energy; sectoral policies; driving growth across the whole country; and creating the right institutions to bring together sectors and places. These pillars frame our approach, and across each of them we set out a programme of new policy.

The pillars

1. **Investing in science, research and innovation –** we must become a more innovative economy and do more to commercialise our world leading science base to drive growth across the UK.
2. **Developing skills –** we must help people and businesses to thrive by: ensuring everyone has the basic skills needed in a modern economy; building a new system of technical education to benefit the half of young people who do not go to university; boosting STEM (science, technology, engineering and maths) skills, digital skills and numeracy; and by raising skill levels in lagging areas.
3. **Upgrading infrastructure –** we must upgrade our standards of performance on digital, energy, transport, water and flood defence infrastructure, and better align central government infrastructure investment with local growth priorities.
4. **Supporting businesses to start and grow –** we must ensure that businesses across the UK can access the finance and management skills they need to grow; and we must create the right conditions for companies to invest for the long term.
5. **Improving procurement –** we must use strategic government procurement to drive innovation and enable the development of UK supply chains.

[8] https://www.gov.uk/government/consultations/building-our-industrial-strategy

6. **Encouraging trade and inward investment** – government policy can help boost productivity and growth across our economy, including by increasing competition and helping to bring new ways of doing things to the UK.
7. **Delivering affordable energy and clean growth** – we need to keep costs down for businesses, and secure the economic benefits of the transition to a low-carbon economy.
8. **Cultivating world-leading sectors** – we must build on our areas of competitive advantage, and help new sectors to flourish, in many cases challenging existing institutions and incumbents.
9. **Driving growth across the whole country** – we will create a framework to build on the particular strengths of different places and address factors that hold places back – whether it is investing in key infrastructure projects to encourage growth, increasing skill levels, or backing local innovation strengths.
10. **Creating the right institutions to bring together sectors and places** – we will consider the best structures to support people, industries and places. In some places and sectors there may be missing institutions which we could create, or existing ones we could strengthen, be they local civic or educational institutions, trade associations or financial networks.

f) Ipswich and Waveney Economic Areas Employment Land Needs Assessment 2016[9]

Waveney District Council, along with Ipswich Borough Council, have produced the Ipswich and Waveney Economic Areas Employment Land Needs Assessment (March 2016)[10]. The report assesses the entire District, including that part which is the Broads.

It provides an update to the economic needs evidence base for the respective local authority areas to 2031 by assessing economic development needs objectively in line with the National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG). The study considers future quantitative land and floorspace requirements alongside related qualitative factors for individual sectors and employment uses.

The Waveney area is self-contained, particularly in terms of its workforce. Therefore, basing a functional area on the administrative boundary is justified through the focus on travel to work.

Lowestoft and Great Yarmouth collectively function as a leading centre for renewable energy, with much of the demand for commercial property driven by these energy and related sectors.

The Waveney Economic Area comprises the Waveney District administrative area, the most easterly District in Britain. Historically, Waveney's economy has been based on farming, printing, manufacturing, food processing and industries taking advantage of the coastal location, but in recent years has become increasingly recognised for its growing potential to support the offshore energy sector. Its close proximity to planned and operational wind farms has generated economic benefits for the District's key town of Lowestoft and this trend is expected to continue in future.

Total employment stands at 47,109, having declined by 3% over the last four years. This suggests that Waveney's economy has particularly suffered from the effects of the recession, together with longer term structural challenges in the local economy. The key sectors in employment terms are public administration, health and education, finance and business services, retail and manufacturing.

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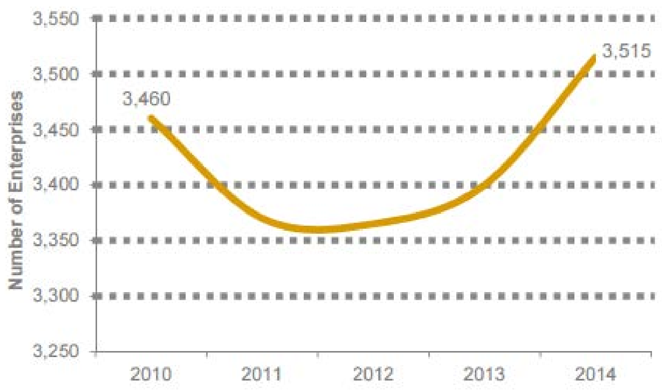
[9] https://www.ipswich.gov.uk/sites/default/files/ipswich_and_waveney_elna_final_report_09.03.16.pdf

[10] http://www.eastsuffolk.gov.uk/assets/Planning/Waveney-Local-Plan/Ipswich-and-Waveney-Employment-land-Needs-Assessment-2016.pdf

GVA per capita in Waveney is one of the lowest in the East of England and whilst the District's business base has been growing in size, this rate of growth also falls behind the regional and national average, with smaller sized businesses (0-9 employees) driving the majority of this growth. Waveney performs poorly across a range of labour market indicators including economic activity, unemployment, earnings and skilled occupations.

Figure 3.9 Stock of Businesses across the Waveney Economic Area



Source: ONS (2015)

In functional economic terms, Waveney is closely connected with neighbouring Great Yarmouth, with both towns playing an important role in servicing the renewable energy sector, and to a lesser extent the oil and gas industry. It has significantly weaker economic linkages with other Suffolk authorities, due in part to the relative distance between these locations and relatively poor condition of the highway network south from Lowestoft.

Waveney is characterised as having a buoyant industrial market, with the town of Lowestoft accommodating the majority of industrial space and occupier requirements. Demand is particularly strong for modern, small and medium sized industrial units with a typical size range of between 1,000sqft/100sqm and 25,000sqft/2,300sqm.

The recent designation of an Enterprise Zone has encouraged new commercial development (including speculative development) to come forward in the area over the past few years, including at Mobbs Way and Riverside in Lowestoft. However, employment land supply within the northern part of the town is nearly exhausted and in absence of new development land being identified, requirements are likely to be displaced to Great Yarmouth which benefits from greater availability of land.

Waveney is not an established office location and lacks the critical mass of office occupiers to compete for office based activity and firms. What limited demand there is comes from local business churn in financial and business services, with some office occupiers connected to the energy sector.

Demand for rural employment space across the two Economic Areas is reported to be limited, with demand generally catered for by existing provision. These types of premises can play an important role in providing affordable workspace and retaining home based businesses within the local community, albeit local commercial property market agents do not expect to see any significant growth within this sector over the short to medium term. It will nevertheless be important that the various Councils continue to safeguard against any future downturns in traditional rural activities by encouraging the conversion and re-use of rural buildings for non-agricultural uses in order to grow and diversify the employment offer in the sub-region's rural economy.

Some of the key findings of the business survey include the following:

1. Key factors influencing choice in business premises within the sub-region include the cost and quality of premises, provisions of ICT and on-site car parking, while key factors influencing choice in business location within the sub-region include internet speeds, access to road networks, quality of the environment, local labour markets and access to local and regional markets.
2. Businesses were generally satisfied with the quality of their premises with an average score provided across the sub-region of 3.4 (out of 5, with a score of 5 representing an 'excellent' quality); with firms in the Ipswich Economic Area indicating a slightly higher perceived quality than those in the Waveney Economic Area.
3. The majority of surveyed businesses within the sub-region indicated that the space provided by their premises was 'about right' to meet their needs, although a quarter of all respondents indicated that they had 'not enough space' to meet their space requirements. This shortage of space was most prevalent in the Waveney Economic Area.
4. Around half the surveyed businesses indicated they have previously had difficulties in finding suitable premises to relocate within the sub-region, with the most commonly cited difficulties including shortage of affordable and modern premises (for both office and industrial premises), high rents and rates and limited on-site car parking. The difficulty in finding suitable premises was reported to be greater in the Waveney Economic Area.
5. The surveyed businesses highlighted a strong ambition for growth, with almost three-quarters of respondents indicating they expected to expand their business operations in terms of land and premises during the next five to ten years. The majority of these businesses anticipated a need for additional office accommodation.
6. To meet their growth requirements, nearly all respondents indicated they would most likely either relocate to another site in the same town or local area, or expand on their existing employment site.
7. Generally the surveyed businesses within the sub-region were satisfied with their local area as a business location, with an average score given of 3.5 (out of 5, with a score of 5 representing 'very satisfied'). A greater satisfaction was indicated by respondents in the Ipswich Economic Area compared to the Waveney Economic Area.
8. The respondents identified a number of strengths and weaknesses of their local areas as business locations, as well as key barriers to growth that primarily related to a shortage of suitable and affordable premises, poor internet infrastructure, attracting and retaining skilled workers, local traffic congestion, and the significant costs of relocation and expansion.

Table 7.10 EEFM Baseline Net Land Requirements 2011 - 2031

Use Class	Ipswich Economic Area (ha)					Waveney Economic Area (ha)
	Babergh	Ipswich	Mid Suffolk	Suffolk Coastal	Total IEA	
Offices (B1a/B1b)	11.9	14.5	12.6	12.1	51.1	9.6
Industrial (B1c/B2/B8)	2.0	9.0	2.1	24.3	37.4	3.4
All B Uses	**13.9**	**23.5**	**14.7**	**36.4**	**88.5**	**13.0**

Source: EEFM 2014 / NLP analysis

Table 7.11 EEFM Offshore Scenario Net Land Requirements 2011 – 2031 (Waveney Only)

Use Class	Waveney Economic Area (ha)
Offices (B1a/B1b)	10.6
Industrial (B1c/B2/B8)	5.9
All B Uses	**16.5**

Source: EEFM 2014 / Waveney District Council / NLP analysis

Table 7.12 Annual Job Growth Implied by Scenario compared with Past Trends

Location		Annual Average Total Job Growth p.a.		
		Baseline EEFM (Scenario 1) (2011-31)	Offshore Renewables Expansion (Scenario 2) (2011-31)	Historic EEFM Trend (2009-13)
Ipswich Economic Area	Babergh	266	n/a	619
	Ipswich	618		-30
	Mid Suffolk	286		436
	Suffolk Coastal	471		596
	Total	1,641		1,621
Waveney Economic Area	Waveney	160	220	-398

Source: EEFM 2014 / Waveney District Council / NLP analysis

Table 7.13 Annual Floorspace Increase Implied by Scenario compared with Past Trends

Location		B Use	Annual Average Floorspace Increase p.a.		
			Baseline EEFM (Scenario 1) (2011-31)	Offshore Renewables Expansion (Scenario 2) (2011-31)	Historic VOA Trend (2000-12)
Ipswich Economic Area	Babergh	Offices	3,120	n/a	1,500
		Industrial	400		1,085
	Ipswich	Offices	4,850		2,335
		Industrial	1,810		-5,170
	Mid Suffolk	Offices	3,310		1,915
		Industrial	420		12,500
	Suffolk Coastal	Offices	3,190		915
		Industrial	4,860		5,585
	Total	Offices	14,470		6,665
		Industrial	7,490		14,000
Waveney Economic Area	Waveney	Offices	2,530	2,780	1,415
		Industrial	680	1,190	1,585

Source: VOA 2012 / NLP analysis Note: Totals rounded

<u>Specific relevance to the Broads Local Plan</u>

The evidence does not indicate the need for employment land in the Broads part of the district's to meet the overall employment land and jobs figures.

g) ***Great Yarmouth Borough Council Employment Land Update 2012***

The Borough Council have produced the Employment Land Update dated November 2012[11]. This study is a selective review of the Employment Land Study (Bone Wells, 2006) and the Lowestoft and Great Yarmouth Area Action Plans – Employment Land Evidence Base Report (DTZ, 2009). The report assesses the entire Borough, including that part which is the Broads.

About the Great Yarmouth Borough economy

Great Yarmouth is dominated by two major industries; the energy industry and tourism. The port is also a major economic driver.

Tourism – As a holiday destination for generations, Great Yarmouth is now the third largest seaside resort in the UK and the tourism industry contributes £460 million annually to the local economy through both overnight visitors and day visitors.

Energy & Engineering - Since the discovery of gas in the Southern North Sea in the 1960s, Great Yarmouth has grown to be one of the largest service bases in the country, rivalled only by Aberdeen. Great Yarmouth is well placed to take advantage of the opportunities soon to arise due to its location close to a new 1,000 turbine wind farm and its expertise in the sector due to the installation and maintenance of Scroby Sands, one of the first offshore wind farms to be completed in the UK.

Port & Logistics – The other main economic driver is the port. With the completion of the deep water outer harbour, the prospects for new business for the port are starting to be realised.

The key employment sectors in Great Yarmouth are health (6,679 employees), retail (5,053 employees), accommodation and food services (4,340 employees), education (3,271 employees) and manufacturing (2,909 employees) (source BRES 2009).

Residents in Great Yarmouth earn significantly below the regional and national averages (£403 per week compared with £523 in the East of England and £502 in Great Britain) but employees in Great Yarmouth are some of the highest paid in Norfolk (£451 with only those in Norwich and South Norfolk earning more at £466 and £476 respectively). This shows that higher paid jobs are taken by those who live outside the borough but the statistics can also be skewed due to the high number of offshore workers whose companies are based in Great Yarmouth.

Employment Sites

From the sites identified as potential new allocations of employment land only those adjacent to Beacon Park are considered suitable. In addition the ground conditions around Beacon Park are good so the land would be unconstrained. Reclaiming land from the sea at South Denes is currently under investigation and it is considered as suitable due to the benefits of the sites location for the offshore renewable sector making development viable.

[11] https://www.great-yarmouth.gov.uk/CHttpHandler.ashx?id=1246&p=0

The historic demand of 2.3 hectares per annum suggests there is a need for 34.5 hectares of employment land between 2013 and 2028. The 2009 DTZ demand forecast indicates that there is a need for 20.81 hectares for the same period.

Summary of Available Land and Demand

- Demand for employment land (15 years) 20.81 – 34.50 hectares
- Undeveloped land 52.74 hectares
- Unconstrained undeveloped land 24.85 hectares
- Potential new allocations Up to 42 hectares

It is recommended that more employment land is designated than is required to meet the forecast demand and that new allocations are made to provide unconstrained land. This is because a high proportion of the undeveloped employment land is constrained by poor ground conditions. Therefore it is considered necessary to provide a surplus and a range of sites as it is likely that not all of the sites will be developed without intervention. It is also important to maintain a surplus in order to allow for market choice, facilitate any need to relocate businesses and to cater for any additional growth that can be achieved from emerging industries, particularly the offshore renewable sector.

The distribution and character of the recommended employment land areas offers a range of land, building and locations which suggests that the differing needs of potential businesses can be met.

Occupation levels evident at the Beacon Park Business Park, Gapton Hall Industrial Estate, Harfreys Industrial Estate and Yarmouth Business Park estates suggest that these locations are viable and desirable and that there are good prospects for further development being delivered where space exists.

The largest single area of undeveloped land is at Beacon Park which is in the Enterprise Zone. Occupation rates of the buildings already on the site suggest that there is now a reasonably healthy demand for this location.

There are issues with constrained land largely due to poor ground conditions. These sites may become viable when the economy recovers however it is likely that the most significantly constrained sites will require intervention. It should be noted however that while development costs and low returns will discourage speculative developers companies with specific location requirements, such as those with port related businesses, these constraints may not be insurmountable especially in the longer term.

Not all of the existing businesses are located in the most appropriate locations for example there are businesses in South Denes that are not connected to port activities. If there is demand additional land for port related, such as renewable energy, activities there is potential for these businesses to be relocated to alternative locations.

<u>Potential New Allocations</u>

Due to the geology of the borough much of the land in Great Yarmouth consists of unconsolidated estuarine deposits and is of very poor building quality. Therefore much of the available undeveloped employment land is constrained by poor ground conditions, there may be a need to provide unconstrained employment land that would be available for development in the short term and does not require intervention.

The only undeveloped land of good building quality adjacent to existing employment areas is around Beacon Park.

There is potential to provide additional land in close proximity to the outer harbour by reclaiming land from the sea to the north of the outer harbour. Such land reclamation might provide additional space where it is most needed, allowing for storage of large plant and materials immediately adjacent to the outer harbour.

Specific relevance to the Broads Local Plan

Of note, the study identifies employment land in the Borough and recommends some areas to become employment land; some of these sites are located near to the Broads (go to maps after page 36 at https://www.great-yarmouth.gov.uk/CHttpHandler.ashx?id=1246&p=0). The evidence does not indicate the need for employment land in the Broads part of the Borough to meet the overall employment land and jobs figures.

h) ***Greater Norwich Councils Employment Work (ongoing)***

At the time of writing, this work was underway. Jobs in the BA do count towards the Greater Norwich baseline and needs/targets as all data is at the district level. However, the initial work illustrates that Greater Norwich have significantly more employment land allocated/permitted than we need so there is no general need to provide land in the BA.

i) ***North Norfolk District Council Business Growth and Investment Opportunities Study 2015***

This Business Growth and Investment Opportunities Study has been prepared for NNDC by the BE Group to assess the local business dynamics and provide recommendations as to encouraging further business investment in North Norfolk. The study forms part of the evidence base for the development of policies in the evolution of the Local Plan and to identify means of attracting inward investment.

Economic Context

The North Norfolk community is characterised by an ageing population, low (but positive) population growth, low unemployment and a moderately skilled workforce. The economy is centred on retailing, tourism, manufacturing and services such as health. The largest employment nodes are Fakenham and North Walsham.

Commuting patterns in North Norfolk show a net outflow of workers from the District, predominantly to other areas of the County, particularly Norwich. However, a high degree of working residents of North Norfolk also live locally, including over half the workforce also living within the same MSOA (town or small area).

The overall functional economic market area for North Norfolk has been defined as the County boundary, drawing together commuting, workforce, industry and policy considerations. The data also suggests that there are three sub-areas within North Norfolk that have differing economic characteristics, with the eastern area having a relationship to Great Yarmouth, Norwich and the Broads; the central area being particularly insular and self-contained and the western area having a relationship with King's Lynn and to the south.

Land and sites

There are two sites in Stalham which could benefit from Council involvement in bringing them forward. These are not within the Broads area according to the Site Allocations document.

Premises

The level of vacant premises in North Norfolk is low, with limited choice for industrial and office stock. In particular there is a lack of mid-sized (500-2,000 sqm) industrial premises, offices above 50 sqm and serviced offices.

Stakeholder Survey

The business survey revealed a high level of satisfaction among respondents with their existing employment premises in North Norfolk. A significant minority of respondents expressed some level of dissatisfaction with their broadband service.

Sector opportunities

Table E2 – Sector Opportunities for North Norfolk

Sector	Existing Situation	Opportunities
Tourism	• Seaside and market towns • Beaches • The Broads • Heritage attractions • Family attractions • Wildlife, including birdwatching • Food and drink • Festivals and events • Independent accommodation	• Improving/streamlining marketing of NN • Improving links between different areas within NN • Branded hotel at Cromer and Holt • Broadening offer for wildlife tourism • Broadening food and drink offer and improve cooperation and coordination between sector operators • Build upon the Deep History Coast project • Lengthening season through broader tourism offer
Food and Beverage	• Broad sector in NN including primary production, processing, retailing, pubs/restaurants and festivals • Good local brand and reputation • Some collaboration/networking in sector, though usually focussed on one aspect (e.g. hospitality) • Seafood and agricultural products	• Value-adding to existing offer • Build upon and protect Cromer Crab brand • Additional processing • High-end food products • Food and beverage built attractions • Cooperative model for local producers • Improved collaboration and industry links • Membership network for broad

Sector	Existing Situation	Opportunities
		sector • NNDC dedicated food and beverage officer
Energy	• Key regional industry • Multiple energy sources • Offshore oil and gas and wind • Bacton Gas Terminal key NN asset • Sheringham Shoal Wind Turbines serviced from Wells-next-the-Sea • Major oil and gas and wind servicing and construction based in Great Yarmouth • Regional growth potential in renewables, nuclear, oil and gas • Construction, servicing and decommissioning	• Continue to support servicing from Wells-next-the-Sea • NN businesses providing servicing and maintenance role for region • Construction of major regional projects (e.g. offshore wind, Sizewell C) provide engineering and construction opportunities throughout region • Engineering/machining to service sector • Build on N Walsham's manufacturing base • Improve local skills in engineering
Engineering/ Manufacturing	• Strength of the District • Key areas are Fakenham, N Walsham, Stalham • Key manufacturing sectors are food products, plastics, machinery, equipment and metal fabrication • Connected to and important for other local strengths (e.g. boatbuilding, rural machinery manufacturing)	• Energy sector (as above) • Boatbuilding, expanding on existing sector and improving supply chain links • Machinery and equipment, expanding on existing sector and improving supply chain links • Improve local skills in engineering and related disciplines
ICT/Creative Industries	• Strength of the region, with a strong Norwich focus • Good higher level skills development in Norwich's universities • NN has some micro businesses locating to District for lifestyle reasons • NN has periphery role in region's sector	• NN to continue to support sector, with focus in Norwich • NN to promote itself as lifestyle destination for sector, in close proximity to Norwich • Business/enterprise centre for NN could accommodate small businesses in sector

Source: BE Group, 2015

The study provides recommendations based on these sectoral opportunities, in particular:

- Promote collaboration between tourism operators and between tourism organisations;
- Encourage the development of a branded hotel in Cromer and Holt;
- Encourage and improve collaboration within sectors, including providing platforms/opportunities for networking and information sharing and promoting value-added opportunities;
- Facilitate and assist in the establishment of a broad-based North Norfolk food and beverage sector organisation;
- Encourage more active involvement of the energy and engineering sector in region-wide industry bodies;
- Encourage investment in growth opportunities in the energy and engineering sector.

Table E3 – Recommended Additional Tasks for Business Engagement Strategy

Activity	Description
Enquiries Protocols	Revise protocols for incoming business enquiries by phone and email with the objective of quickly and efficiently forwarding to the appropriate specialist officer
Specialist Sub-area Engagement	Specific economic development officers for North Walsham and eastern area (Sub-area 1), Cromer and central areas (Sub-area 2) and Fakenham and western areas (Sub-area 3) to have targeted engagement with these key employment areas.
Small Business Support	Develop a strategy for assisting new and small businesses to grow in conjunction with the LEP's Business Hub and the new NWES Enterprise Centre
Specialist Sector Engagement e.g. Food and Beverage (others may be energy, tourism or engineering)	Specific economic development officer for the food and beverage sector, to draw together the primary production, processing, retailing, hospitality and tourism aspects of this sector, with a remit to improve collaboration and interaction in the sector.

Table E4 – Skills and Training Tasks

Theme	**SKILLS AND TRAINING**
Issue	• There is a need to continue to develop the District's skills to ensure local businesses have the capacity to exploit growth opportunities
Tasks	• Continue to support the LEP and NCC initiatives for skills improvement • Seek to implement the recommendations of the Skills Analysis • Engage with North Norfolk businesses to identify priority skills area shortages in the District • Identify a list of local industry representatives that can be recruited to promote key industry sectors as career options in schools and colleges • Work with industry representatives such as EEF or EEEGR to develop a list of skills needs that would be addressed at the local school, further education and regional higher education levels • Promote the need and importance for business etiquette and social skills in schools and colleges • Engage with schools and colleges to promote specific vocations, including engineering trades, business computing, digital marketing, care services and other vocations identified through engagement with local businesses • Engage with region's universities and further education colleges to promote opportunities for internships and sponsored placements to be undertaken in North Norfolk • Engage with Skills Council and other skills providers to look at sector specific development • Encourage local businesses to sponsor scholarships in FE colleges and universities • Develop a programme of on-going collaboration with FE colleges and local businesses to guide apprenticeship and course curricula • Encourage apprenticeships in the rural sector • Facilitate a programme of skills improvements in the rural sector to promote value adding opportunities including crop diversification, organic certification, tourism and marketing • Assistance programmes for individuals and employers for reskilling of the 50+ age cohort • Investigation of apprenticeship-type programmes for long-term unemployed 50+ year olds • Encourage leading industry individuals in North Norfolk to present information to schools and colleges to generate interest in careers in the sectors

Table E5 – Inward Investment Tasks

Theme	INWARD INVESTMENT
Issue	• To promote investment in North Norfolk and increase the District's profile in the region
Tasks	• Continue to support and take an active role in NCC and LEP initiatives for business attraction identifying and promoting key priority sector – e.g. offshore wind, food and beverage, engineering • Continue to share resources, including staff secondments, to NCC and LEP programmes for economic development • Identify a clear and coherent message for potential investors as to North Norfolk's offer, its economy and its position within the broader region (see discussion on future investment prospectus) • Promote North Norfolk as a business location through NCC and LEP's channels for business investment • Encourage investment and sites within and around the existing townships • Encourage and contribute to the development of sector-specific business development strategies in the key target sectors for Norfolk and the LEP. • Support the region's collaboration and engagement with trade organisations and UKTI • Ensure there is sufficient employment premises and land to enable businesses to easily locate to North Norfolk, through an employment land review and regular monitoring

Table E7 – Property Provision Tasks

Theme	PROPERTY PROVISION
Issue	• To ensure there is adequate supply of appropriate employment land in North Norfolk to encourage business growth
Tasks	• Undertake a fresh and full audit of site allocations and built stock to fully understand the existing situation for employment premises and land • Review and amend site allocations, policies and strategic documents to reflect the updated audit information • Investigate options for the short term release of further employment land in Cromer, with a particular focus on industrial/warehouse units • Continue to engage with the proponents of the F01 site in Fakenham to deliver further employment sites as soon as possible • Investigate site options for further industrial land in North Walsham, deliverable in the short term • Actively encourage the speculative development of industrial sites in Cromer, North Walsham and Fakenham • Consider the appointment of a panel of developers to work directly with landowners not involved in the development of their own land • Serviced offices/start up space to be provided in the District, with potential locations in Fakenham, Holt or North Walsham • Continue to engage with NCC in regards to bringing forward premises in Scottow Enterprise Park • Review the planning provisions at Scottow with an objective of streamlining and reducing planning constraints on the site • Improve collaboration and information sharing between economic development and planning officers within NNDC and between NCC and NNDC officers • Establish more direct dialogue with the property industry through regular meetings, direct annual monitoring and possibly a property forum.

Supply chain improvements and sectoral collaboration should be further encouraged in North Norfolk, which will build upon the District's strengths. Recommended tasks for supply chain improvements are:

Table E8 – Supply Chain Improvements/Sector Collaboration Tasks

Theme	SUPPLY CHAIN IMPROVEMENTS/SECTOR COLLABORATION
Issue	• To support and improve economic growth in the identified key sectors for North Norfolk
Tasks	• Review Council's capability and resources for facilitating each of the key growth sectors for North Norfolk, including in-house knowledge, staffing, NCC and LEP resources available and budget • Encourage and incentivise large organisations in each key sector to widen supply chains with local smaller and medium operators • Establish a series of key cluster groups which should become self-managing, but with the aim of building collaboration, supply chain development, mentoring, including: • **Food and Drink:** Facilitate and assist in the establishment of a North Norfolk food and beverage sector body that includes and engages the primary production, processing, hospitality, retail and tourism aspects of the local industry • **Energy and Engineering:** Encourage higher involvement of North Norfolk firms in the East of England Energy Group, particularly support engineering and componentry businesses • **Small Business:** Offer hosting of County-wide and LEP wide business organisation events to encourage higher participation of District businesses, work with Enterprise Centres to promote services to small businesses • **Tourism:** Promote collaboration between north coast tourist facilities and The Broads tourist facilities to encourage visitations that incorporate both destinations • **Property:** Bring together developers and agents to advise informally, or even formally on development, marketing and regeneration.

Specific relevance to the Broads Local Plan

None of the development options considered in the report seem to be in the Broads.

j) Norwich City Deal[12]

City Deals are agreements between government and a city; giving that city greater control over decisions that affect it. It means that the city can decide how public money should be spent in order to help businesses grow and create economic growth. The City Deal Partners' ambition for the Greater Norwich City Deal is to enable the knowledge based industries to develop and grow. The deal focuses on turning world class knowledge and ideas into world class jobs.

Greater Norwich will use its City Deal to accelerate the growth, and help unlock the potential of, Norwich Research Park, acting as a catalyst to benefit the Greater Norwich area including the Norwich International Airport aviation cluster and city centre digital businesses. As a result of the City Deal the local partners predict the Deal will lead to:

i. A step change in commercialisation on the Norwich Research Park with a significant rise in spin-out businesses creating 3,000 new high value jobs by 2020
ii. At least 300 new businesses and 3,000 high value jobs across the Local Enterprise Partnership area established by 2015
iii. £100 million additional private sector investment to support business growth

12 https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/265424/Greater_Norwich_City_Deal_Document.pdf

iv. Over £2.3 billion private sector housing investment
v. Bringing forward 3,000 additional houses in the North East Norwich Growth Triangle
vi. 13,000 additional jobs across Greater Norwich

The Broads Authority is not directly involved in the Norwich City Deal, but it is of relevance to the Broads as part of the Broads Authority Executive Area is within Norwich City.

k) New Anglia LEP

Whilst there is no specific mention of the Broads in New Anglia documentation reviewed below, the Broads is located between Great Yarmouth, Norwich and Lowestoft which are all areas important to the economy reflecting their offers such as energy. Furthermore, the various businesses located within the Broads are mostly related to the 10 sectors on which the New Anglia LEP focuses on.

Sectors[13]

The LEP focusses on 10 sectors of genuine strength and economic opportunity to ensure that the East is recognised as a dynamic and thriving community of businesses.

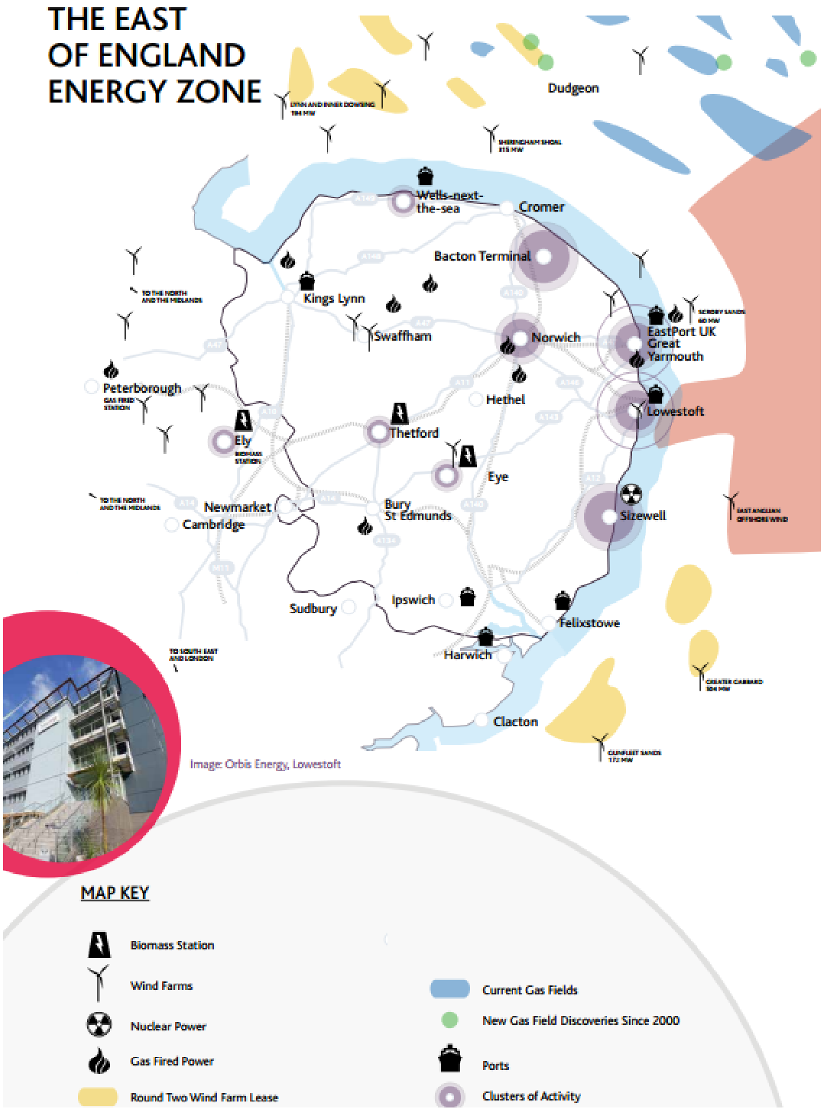
1. Advanced Manufacturing and Engineering. Technological advancements in manufacturing for the offshore, marine and agri-tech industries have been dramatic in recent years. As a result, the advanced manufacturing and engineering sector in Norfolk and Suffolk contains globally competitive and exportable businesses which have bucked the economic trend and grown significantly during recent recession periods.

2. Building Growth. Building Growth has been set up to drive sustainable economic growth in the construction and development industry. The sector group brings together a wide range of committed businesses and organisations including builders, architects and local authorities.

3. Cultural sector. The sector is a vital source of economic growth, both directly in terms of jobs and employment, and as a source of innovation and collaboration with other growth sectors. They make an enormous contribution to making our region a fantastic place to live, work, visit, and invest. They attract talent, support our visitor economy and drive investment into vital cultural assets in our towns and cities, making them more vibrant and attractive places.

4. Energy. The East of England offers a unique energy proposition, with its mix of offshore, onshore and nuclear enterprises. As a result of these sources of energy generation, the region is of key strategic importance to the UK.

[13] http://www.newanglia.co.uk/our-priorities/sector-groups-and-contacts/



5. Financial services. The financial services sector makes the largest single contribution to New Anglia's economy with 13.4% of GVA worth £3.1 billion. With a heritage going back more than 200 years, and two distinct bases in Norwich and Ipswich, New Anglia is globally respected as a centre of financial excellence. In 2010, more than 20,000 people were employed in the financial services sector and 792 businesses helped the region achieve a turnover of more than £7.5 billion.

6. Food, Drink and Agriculture. Norfolk and Suffolk have a world-class food, drink and agricultural sector, which is both the largest manufacturing and service sector. The sector employs 112,500 people and has a GVA of £2.2bn (10% of total GVA) in Norfolk and Suffolk. Our rural economy accounts for 12% of all England's cereal production, 20% of the UK's vegetables, 20% of its potatoes and 50% of its sugar beet. Intensive livestock is also a string sector, with 25% of the UK pig herd and 20% of the poultry.

7. ICT and Digital Creative. ICT and digital creative is one of the fastest growing sectors in the UK and a major driver for the economy in Norfolk and Suffolk. Both Ipswich and Norwich are recognised as Tech Clusters in the Government's Tech Nation report.

8. Ports and Logistics. Norfolk and Suffolk's long coastline combined with significant investment in offshore energy has resulted in the region's ports and logistics sector thriving over recent years. In 2010, the sector provided jobs for more than 23,520 people across 1,695 businesses. The GVA per employee was £55,695.

9. Tourism. Tourism in Norfolk and Suffolk generates £4 billion each year. We offer visitors an impressive choice of attractions and destinations, but there is potential to develop an even more compelling year-round offer. By creating a unified tourism brand for Norfolk and Suffolk which provides a reason to visit from January to December, we will attract more tourists, who will spend more money in the region.

10. Life science and Biotechnology. Life sciences and biotechnology have emerged as world-class clusters for Suffolk and Norfolk. New Anglia is home to leading edge research facilities and expertise within these areas, our region is seen as a true centre of excellence

New Anglia Strategic Economic Plan[14]

Our Strategic Economic Plan (SEP) sets out the LEP's ambition to harness the distinct sector strengths and our natural assets to deliver more jobs, new businesses and housing. It commits the LEP to work with government and local partners to deliver:

- 95,000 more jobs: In 2012 there were some 760,000 jobs in the New Anglia area. The East of England Forecasting Model predicts that continuation of pre-existing investment plans will see this grow by 63,000 by 2026. TheStrategic Economic Plan will significantly increase this business as usual number by 50 per cent to 95,000
- 10,000 new businesses: Small businesses are the lifeblood of our economy – accounting for more than 95 per cent of businesses in the area. By 2026 we will create a further 10,000 businesses. This equates to an average increase of 1,000 per year compared with an average increase of 516 per year between 2004 and 2008 and an average decrease of 615 per year between 2009 and 2011
- Improved productivity: Gross Value Added (GVA) perjob in the area was £36,244, some 10% below the UK average of £40,007. The East of England Forecasting Model predicts that pre-existing investment plans will see this gap remain. Our Strategic Economic Plan will enable us to extinguish the gap by 2026 when gross added value per job will equal the national average 117,000 new houses: Our local authorities have set ambitious house building targets to support economic growth. By 2026 we will have delivered at least 117,000 new houses in the New Anglia area – key Local Plans have the flexibility to deliver more if the demand arises. This equates to a 32% increase in delivery compared with the period 2001-12.

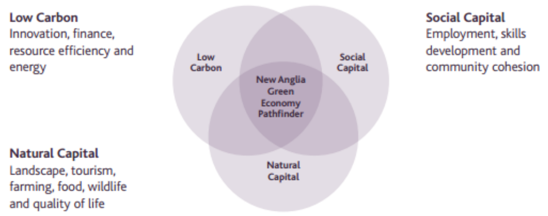
[14] http://www.newanglia.co.uk/wp-content/uploads/2014/03/New-Anglia-Strategic-Economic-Plan-V2.pdf

Our plan is to capitalise on our global strengths in areas such as agri-tech and life sciences, energy, ICT and creative digital, to accelerate growth in our economy.

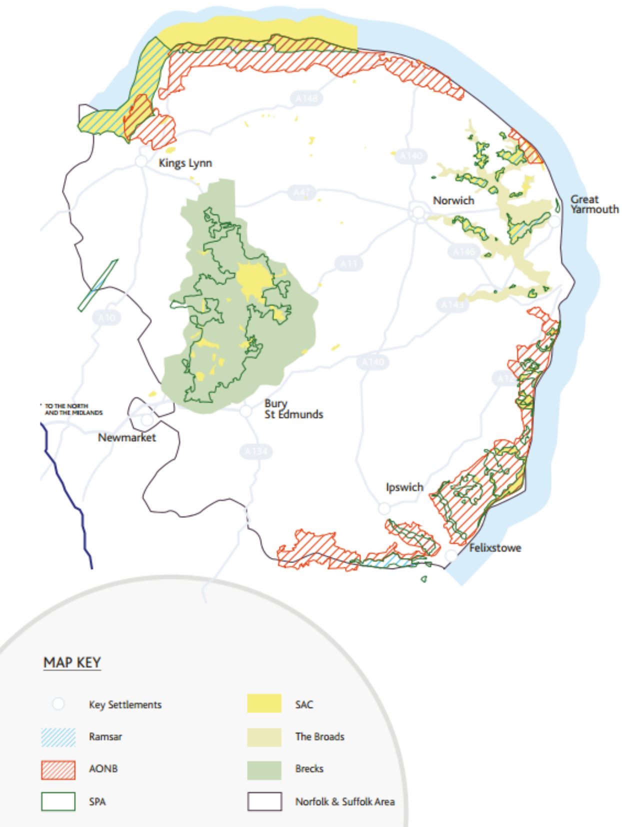
In addition to supporting our high-impact sectors we intend to strengthen our leadership role in the green economy.

Our strategy is focused on creating more high value jobs and improving the productivity of existing businesses. To achieve this, businesses need to make better use of support and that support needs to be targeted towards productivity growth.

To attain our goal of more high value jobs and more productive businesses, we need to improve our skills system. Our resident workforce is ageing, low skilled and low paid. As a result, many of the available high value jobs go to an imported workforce. Our businesses tell us that they struggle to find skilled employees, especially for the scientific and technical jobs in our high impact sectors. Concurrently, worklessness and a lack of social mobility reduce the prospects for individuals.



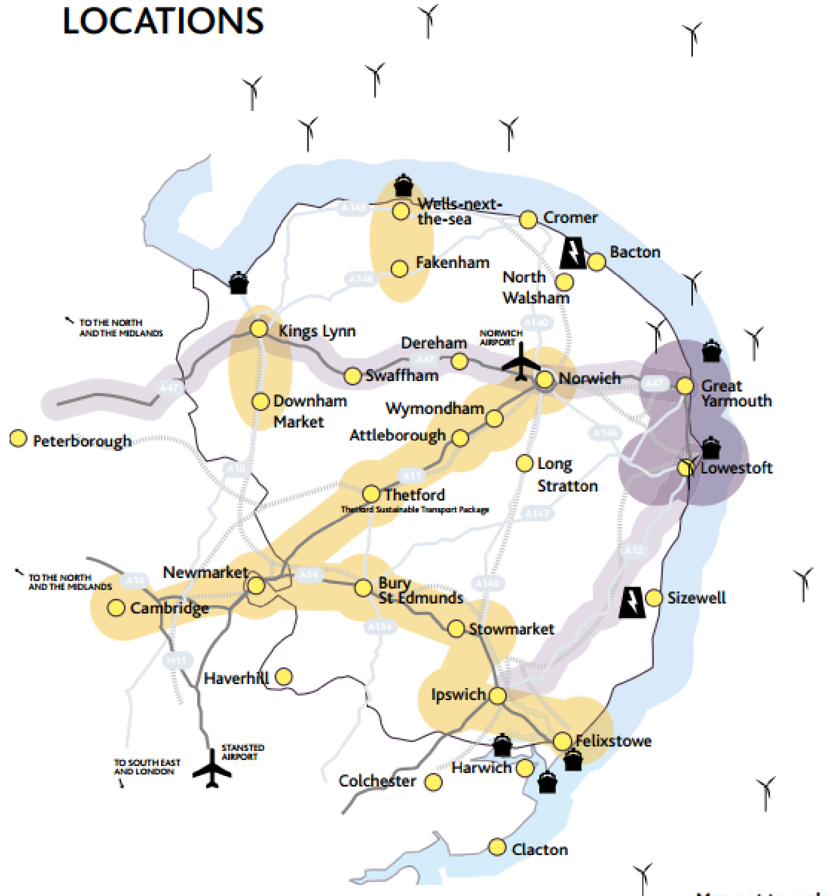
ENVIRONMENTAL ASSETS



New and expanding businesses need space to grow and high quality infrastructure to help them be productive and competitive.

We are planning for a further 117,000 homes to 2026, which represents a 30% increase on historic delivery rates. We intend to accelerate delivery wherever possible and encourage local authority partners (in line with government guidance) to prepare up to date estimates of housing need and to plan accordingly.

GROWTH LOCATIONS

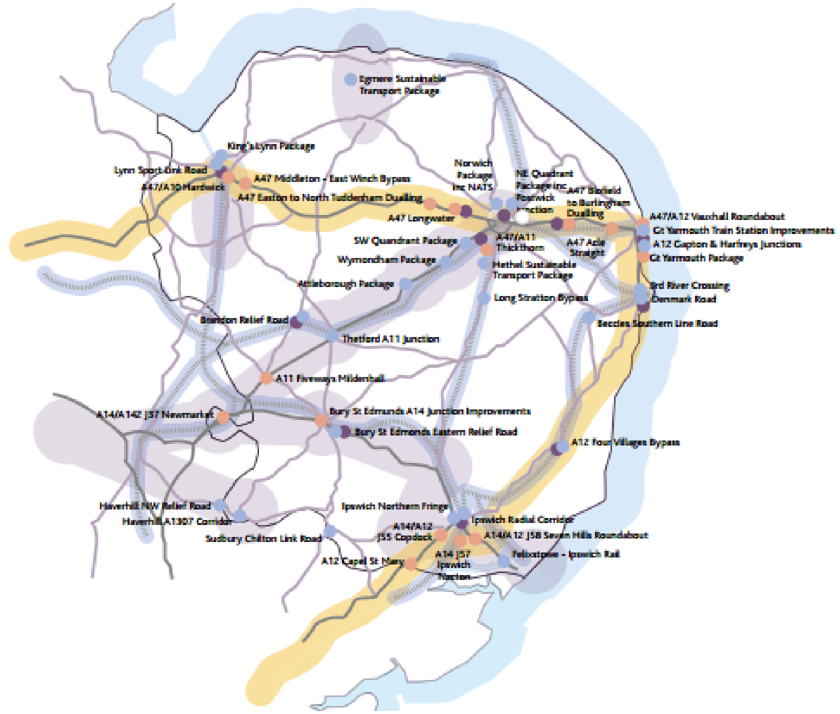


Map not to scale

MAP KEY

- Major Energy Infrastructure
- Wind Farms
- Ports
- International Airport
- Trunk Routes
- Primary Routes
- Rail Routes
- A12/A47 Key Links
- Growth Location
- Enterprise Zone
- Growth Corridor

TRANSPORT INFRASTRUCTURE



MAP KEY

- LTB Priorities
- National Network Improvement (Road)
- Single Local Growth Fund
- Norwich Northern Distributor Road
- Trunk Roads
- Principal Roads
- Rail Routes
- National Rail Improvements (Rail)
- A12/A47 Key Links
- Growth Corridor

New Anglia Growth deal[15]

New Anglia LEP's total Growth Deal from Government is £221.5m to 2021. It is forecast to create up to 16,000 new jobs, 3,000 new homes and the potential to generate an additional £240m public and private investment. Some of the key achievments of New Anglia's Growth Deal with Government are relevant to the Broads/located in communities near to the Broads:

- Lowestoft Third Crossing
- Norfolk Broadband Programme
- Suffolk Broadband Programme
- Norwich Area Transportation Strategy: City Centre
- Beccles Southern Relief Road
- Great Yarmouth Transport Package

[15] http://www.newanglia.co.uk/new-anglia-growth-deal-achievements/

Appendix C: Economic Baseline

a) STEAM Report 2015

This regularly updated report assesses the number of visitors and spend related to the Broads.

Visitor numbers	7.4 Million
Direct spend	£431 Million
Economic impact	£584 Million
Jobs dependent	7,245

These figures show a small decrease on 2014

Visitor numbers are down 4%, but 2014 was 3% up on the previous year and a drop of just 1% over two years is statistically insignificant.

(Source: STEAM)

b) Structure of the agricultural industry in England and the UK at June[16]

These data series show land and crop areas, livestock populations and agricultural workforce estimates for England and the UK as at 1 June each year. The results come from the long-running June surveys of agriculture and horticulture that are carried out each year in England, Scotland, Wales and Northern Ireland. The information includes long-term trends or detailed results for different types of farm, farm size or geographical area. The series are updated as new results become available.

Geographical breakdowns are only available in the years that correspond to the EU Farm Structure Survey. The latest available results are for 2010 and 2013. The next updates will relate to 2016 and then 2020. The following table shows information for the Authority's six districts:

[16] https://www.gov.uk/government/statistical-data-sets/structure-of-the-agricultural-industry-in-england-and-the-uk-at-june

Local Authority breakdown for the agricultural labour force on commercial holdings[(1),(2)]

Local Authority[(3)]	Farm labour[(4)]						
	Farmers, partners, directors and spouses full time	Farmers, partners, directors and spouses part time	Salaried managers	Regular workers full time	Regular workers part time	Casual workers	Total labour
	Number of people						
	% difference 2013/2010						
Broadland	11	- 8	- 1	16	- 10	- 82	- 22
Great Yarmouth	12	0	n/a	- 1	2	n/a	- 30
North Norfolk	2	0	- 2	1	13	213	25
Norwich & South Norfolk	7	- 2	- 19	- 5	- 2	22	1
Waveney	1	4	12	34	- 13	2	5
Eastern	**2**	**- 4**	**1**	**3**	**- 7**	**- 2**	**- 1**
England	**3**	**- 2**	**- 1**	**- 1**	**0**	**5**	**1**

Notes:

(1) Commercial holdings are those above the thresholds for the 2010 Census. Please see the metadata tab for further details.

(2) Comparisons are between 2007 and 2010 as the sample size on the June Survey was insufficient to produce robust local authority estimates in 2008 or 2009.

(3) Where Local Authorities have few commercial farms the information for these geographical units has been grouped in with an adjacent unit. These are denoted with an '&' in the description.

(4) Part time workers are those employed for less than 39 hours a week. Figures exclude school children but include trainees employed under an official youth training scheme and paid at Agricultural Wages Board rates or above.

#' - indicates that data has been suppressed to prevent disclosure of information about individual holdings, therefore totals may not necessarily agree with the sum of their components.

Department for Environment Food & Rural Affairs

The Broads National Park

	All holdings 2007	All holdings 2008	All holdings 2009	Commercial holdings[a] 2009	Commercial holdings[a] 2010	Commercial holdings[a] 2013
Number of holdings by farm type[b]						number of holdings
Cereals	21	25	25	25	17	19
General cropping	53	46	49	45	68	52
Horticulture	9	14	12	9	11	7
Specialist pigs	#	#	#	#	#	#
Specialist poultry	#	#	#	#	#	5
Dairy	8	9	9	9	9	#
LFA grazing livestock	0	0	0	0	0	0
Lowland grazing livestock	53	47	49	42	52	53
Mixed	15	14	16	14	19	24
Other	224	224	226	73	8	#
Total holdings	**393**	**393**	**396**	**222**	**190**	**170**
Number of holdings by total area size groups						number of holdings
<5ha	178	176	179	28	22	22
5 <20ha	84	84	82	65	47	41
20 < 50ha	44	49	43	43	38	27
50 <100ha	28	30	30	27	20	22
>=100ha	59	54	62	59	63	58
Land use						hectares
Total area	20 651	17 381	20 243	19 260	19 203	17 593
Rented	4 166	4 139	4 140	4 097	3 369	3 196
Owned	18 713	15 355	17 502	15 853	15 648	14 489
Crops and fallow	9 276	7 603	9 269	9 254	8 339	8 608
Temporary grass	401	358	304	269	234	310
Permanent grass	7 303	7 257	8 167	7 464	7 832	7 221
Sole right rough grazing	971	899	782	742	466	236
Woodland	973	519	932	920	1 185	674
Other land	951	745	788	610	1 147	543
Crops						hectares
Cereals	5 279	4 702	5 483	5 480	5 002	5 233
Other arable crops	3 028	2 113	2 820	2 814	2 889	2 744
Horticultural crops	738	587	621	617	83	305

	All holdings 2007	All holdings 2008	All holdings 2009	Commercial holdings[a] 2009	Commercial holdings[a] 2010	Commercial holdings[a] 2013
Cattle						number of animals
Dairy herd[c]	1 595	1 549	1 531	1 529	1 143	700
Beef herd[d]	2 806	2 707	2 466	2 443	2 762	2 897
Calves <1yr	4 201	3 903	3 747	3 726	3 469	3 165
Other cattle	5 804	4 031	4 298	4 267	4 675	4 745
Total cattle	**14 406**	**12 190**	**12 042**	**11 965**	**12 049**	**11 507**
Pigs						number of animals
Breeding herd	368	#	#	#	#	#
Other pigs	6 945	#	#	#	#	#
Total pigs	**7 313**	**7 450**	**6 886**	**6 522**	**6 115**	**8 602**
Sheep						number of animals
Breeding ewes	1 652	1 701	1 920	1 881	3 105	2 371
Lambs under 1yr	1 588	1 582	1 877	1 815	3 997	1 412
Other sheep	160	183	211	208	160	932
Total sheep	**3 400**	**3 465**	**4 009**	**3 904**	**7 261**	**4 715**
Poultry						number of animals
Total fowls	70 369	80 296	80 126	79 780	40 667	45 236
Other poultry	6 076	9 322	7 571	7 540	308	339
Total poultry	**76 445**	**89 617**	**87 697**	**87 320**	**40 975**	**45 575**
Other Livestock						number of animals
Goats	49	76	67	59	50	47
Horses	288	281	277	249	252	227
Labour						number of people
Farmers full time	123	133	132	125	116	119
Farmers part time	144	137	182	142	156	144
Salaried managers full time	19	14	#	#	16	17
Salaried managers part time	14	8	#	#	19	15
Employees full time	125	118	101	97	77	75
Employees part time	64	61	43	43	55	55
Casual workers	110	109	124	117	105	96
Total labour	**599**	**580**	**601**	**541**	**545**	**521**

(a) Results for 2010 and 2013 relate to commercial holdings only. Commercial holdings are those with significant levels of farming activity. These significant levels are classified as any holding with more than 5 hectares of agricultural land, 1 hectare of orchards, 0.5 hectares of vegetables or 0.1 hectares of protected crops, or more than 10 cows, 50 pigs, 20 sheep, 20 goats or 1,000 poultry. Results for 2009 have been displayed for all holdings and for commercial holdings to allow comparisons to be made.
(b) For 2010 onwards the methodology for classifying farm types has changed to one based on Standard Outputs. More details can be found in the standard output typology document on the June webpage: https://www.gov.uk/structure-of-the-agricultural-industry-survey-notes-and-guidance. Standard outputs were previously based on a five year average centred around 2007. In 2013 the five year average was changed to centre on 2010. Please see the metadata tab for more details on these methodological changes.
(c) Cows in the Dairy herd are defined as female dairy cows over 2 years old with offspring.
(d) Cows in the Beef herd are defined as female beef cows over 2 years old with offspring.
'#' - indicates suppressed to prevent disclosure of information about individual holdings. More information on suppression can be found on the metadata tab.

Local Authority breakdown for key crops areas and livestock numbers on agricultural holdings(1),(2)

Local Authority(3)	Number of holdings 2013	Hectares					Number of livestock			
		Total farmed area	Cereals	Arable crops (excl cereals)	Fruit and vegetables	Grassland (4)	Cattle	Sheep	Pigs	Poultry
		% difference 2013/2010								
Broadland	377	4	2	6	- 12	5	- 1	6	- 8	- 20
Great Yarmouth	143	11	14	4	32	- 5	- 19	9	- 2	- 38
North Norfolk	584	2	4	4	5	- 4	- 16	- 26	14	- 24
Norwich & South Norfolk	744	4	0	1	29	8	- 12	19	4	- 2
Waveney	283	1	0	- 1	250	- 2	12	- 73	19	- 17
Eastern	**11 678**	**- 1**	**- 5**	**2**	**- 4**	**- 1**	**- 5**	**- 3**	**11**	**- 8**
England	**102 836**	**2**	**0**	**4**	**- 4**	**1**	**- 3**	**5**	**13**	**- 4**

Notes:
(1) Figures for 2010 and 2013 refer to commercial holdings only whereas 2007 results apply to all holdings. Commercial holdings are those above the thresholds for the 2010 Census. Please
(2) Comparisons are between 2010 and 2013 as the sample size on the June Survey was insufficient to produce robust local authority estimates in 2011 or 2012.
(3) Where Local Authorities have few commercial farms the information for these geographical units has been grouped in with an adjacent unit. These are denoted with an '&' in the description.
(4) Grassland includes temporary grass under 5 years old, permanent grass over 5 years old and sole right rough grazing.
#' - indicates that data has been suppressed to prevent disclosure of information about individual holdings, therefore totals may not necessarily agree with the sum of their components.

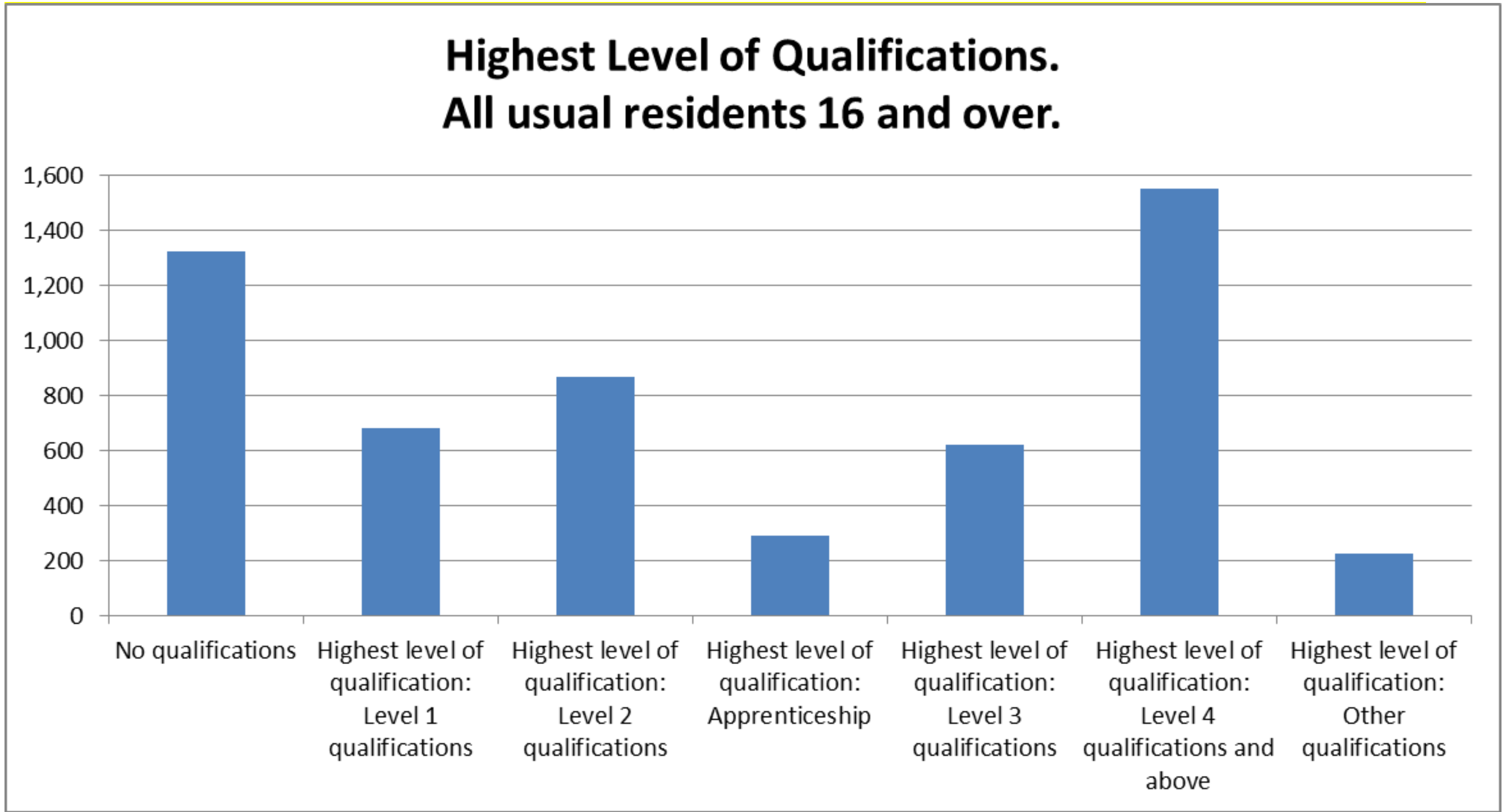
c) Out of work benefits (Wards)[17]

The Parishes that are in the Broads Executive Area are in the following Wards. The percentage figures show the number of out of work benefits claimants as a proportion of resident population aged 16-64. The average for Great Britain is 1.8%. Red highlights the highest level and green highlights the lowers level. Please note that in most cases only part of the Parish is in the Broads Executive Area; this is the best data available for monitoring unemployment levels in the Broads.

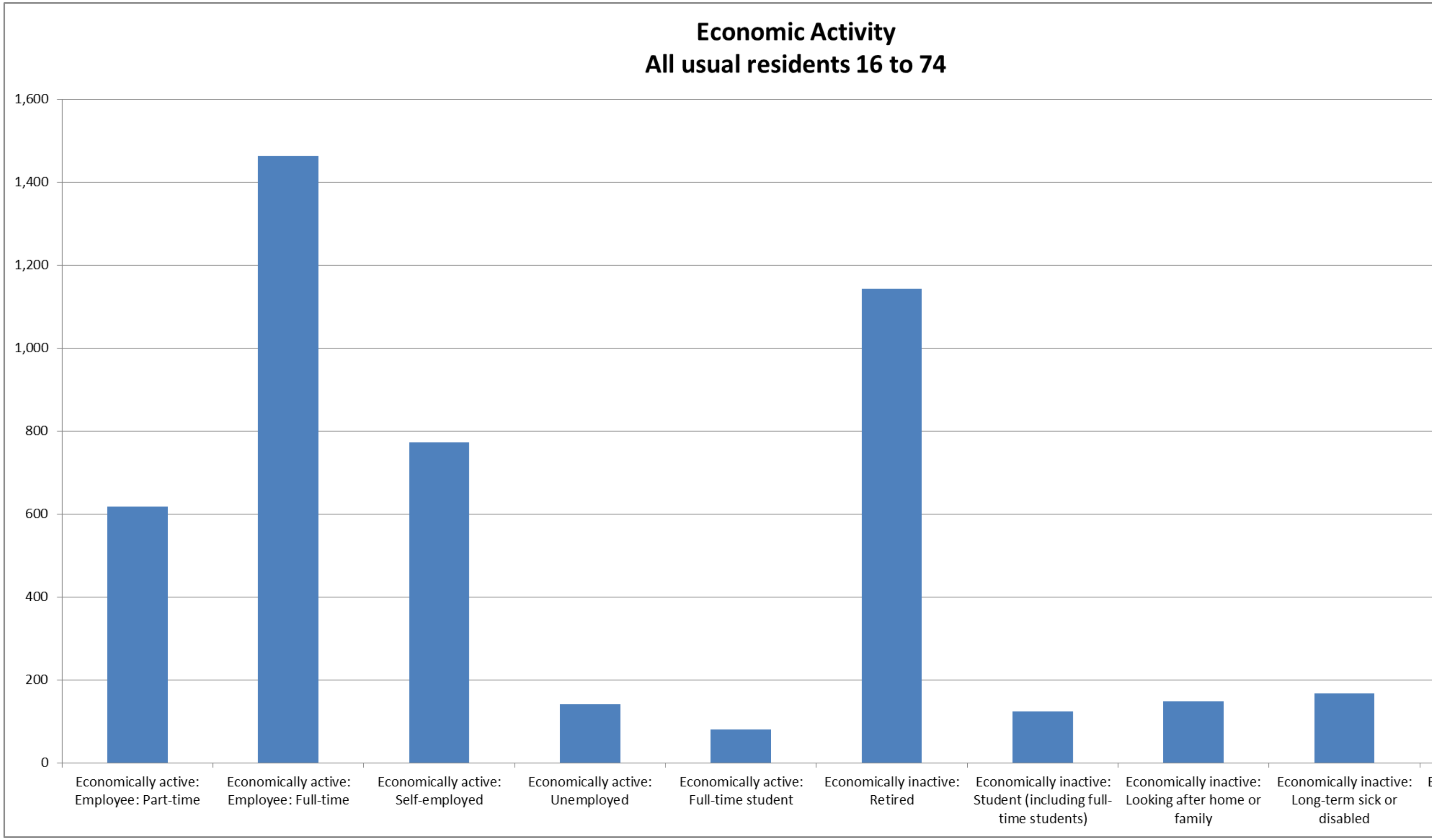
Ward	Out of work benefits June 2016	Out of work benefits September 2016	Out of work benefits December 2016
33UCGN : Acle	1.0%	0.8%	1.3%
33UCGQ : Blofield with South Walsham	0.5%	0.4%	0.4%
33UCGR : Brundall	0.8%	0.9%	0.7%
33UCGT : Buxton	0.2%	0.4%	0.5%
33UCGU : Coltishall	0.5%	0.4%	0.6%
33UCHE : Marshes	0.5%	0.5%	0.5%
33UCHQ : Thorpe St Andrew South East	0.6%	0.6%	0.7%
33UCHR : Wroxham	0.5%	0.8%	0.8%
33UDFY : Bradwell North	1.0%	0.8%	1.5%
33UDGB : Caister South	1.2%	1.4%	2.2%
33UDGE : East Flegg	1.1%	1.4%	2.1%
33UDGF : Fleggburgh	1.3%	1.0%	1.3%
33UDGL : Ormesby	0.9%	1.4%	2.0%
33UDGP : West Flegg	1.1%	1.2%	1.4%
33UFGY : Happisburgh	0.7%	0.6%	1.2%
33UFHB : Hoveton	1.0%	1.4%	2.1%
33UFHM : Scottow	0.5%	0.5%	0.5%
33UFHR : Stalham and Sutton	1.5%	1.7%	1.6%
33UFHX : Waterside	0.6%	0.7%	0.7%
33UFHY : Waxham	0.6%	0.9%	0.8%
33UHHA : Chedgrave and Thurton	1.0%	1.6%	1.3%
33UHHF : Ditchingham and Broome	0.5%	0.4%	0.6%
33UHHG : Earsham	0.6%	0.4%	0.6%
33UHHK : Gillingham	1.0%	1.1%	0.7%
33UHHQ : Loddon	1.2%	1.2%	1.4%
33UHHY : Rockland	0.7%	0.8%	0.7%
33UHJC : Stoke Holy Cross	0.4%	0.5%	0.5%
33UHJF : Thurlton	0.8%	0.6%	1.2%
42UHFY : Beccles North	1.2%	1.3%	1.8%
42UHGB : Bungay	1.0%	1.0%	1.1%
42UHGD : Carlton Colville	1.1%	1.2%	1.5%
42UHGE : Gunton and Corton	1.0%	1.3%	2.0%
42UHGK : Lothingland (GYBC)	1.2%	1.0%	2.1%
42UHGN : Oulton Broad (Whitton)	1.6%	1.6%	1.6%
42UHGT : Wainford	0.8%	0.9%	1.0%
42UHGW : Worlingham	0.9%	0.7%	0.9%

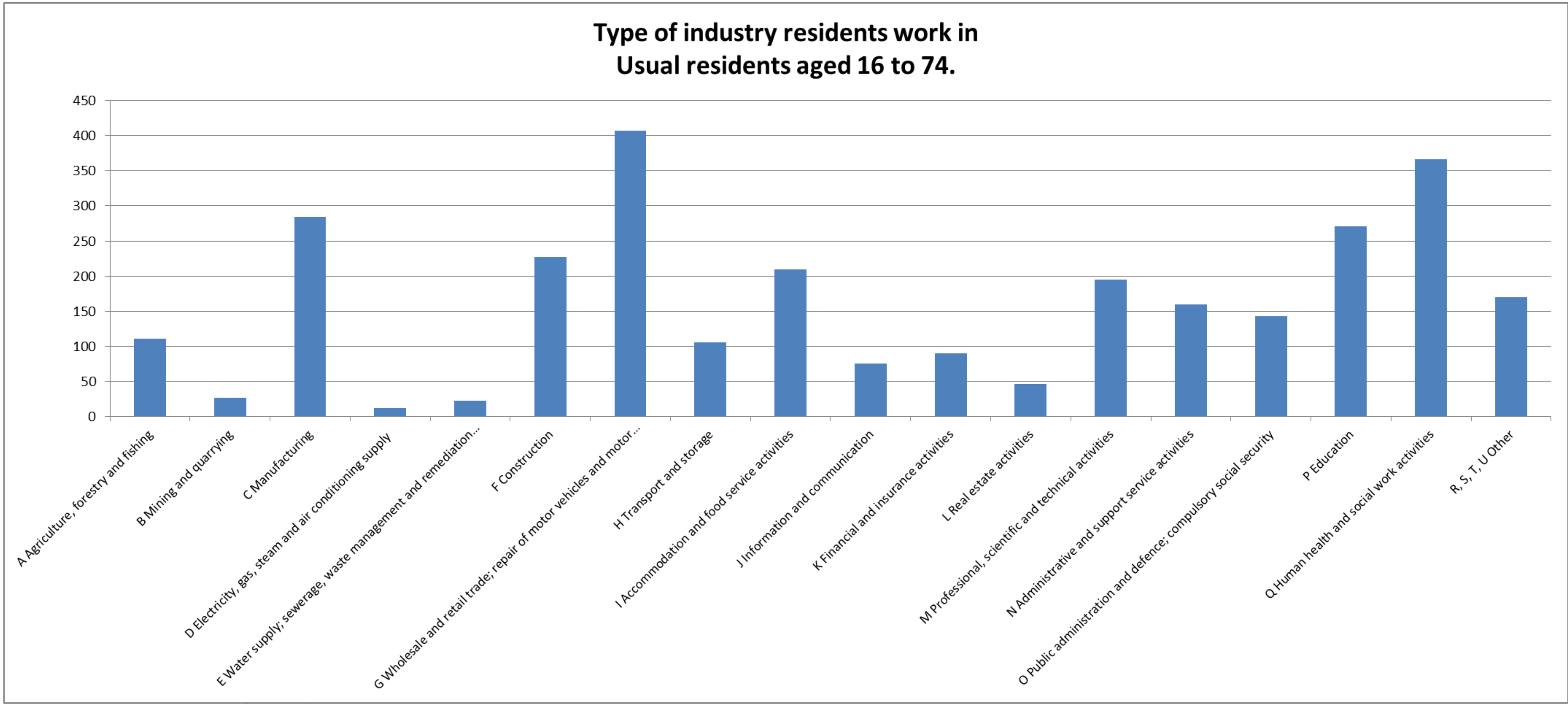
[17] http://www.nomisweb.co.uk

d) Census 2011 – statistics relating to the economy and employment.

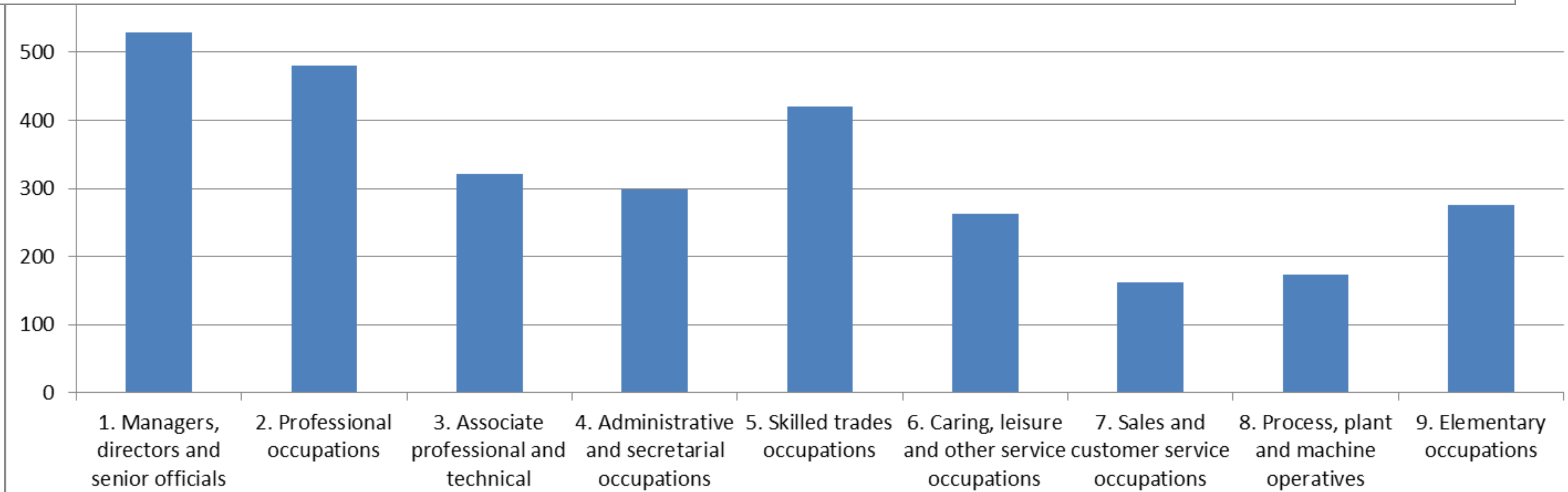


- No Qualifications: No academic or professional qualifications
- Level 1 qualifications: 1-4 O Levels/CSE/GCSEs (any grades), Entry Level, Foundation Diploma, NVQ level 1, Foundation GNVQ, Basic/Essential Skills
- Level 2 qualifications: 5+ O Level (Passes)/CSEs (Grade 1)/GCSEs (Grades A*-C), School Certificate, 1 A Level/ 2-3 AS Levels/VCEs, Intermediate/Higher Diploma, Welsh Baccalaureate Intermediate Diploma, NVQ level 2, Intermediate GNVQ, City and Guilds Craft, BTEC First/General Diploma, RSA Diploma
- Apprenticeship
- Level 3 qualifications: 2+ A Levels/VCEs, 4+ AS Levels, Higher School Certificate, Progression/Advanced Diploma, Welsh Baccalaureate Advanced Diploma, NVQ Level 3; Advanced GNVQ, City and Guilds Advanced Craft, ONC, OND, BTEC National, RSA Advanced Diploma
- Level 4+ qualifications: Degree (for example BA, BSc), Higher Degree (for example MA, PhD, PGCE), NVQ Level 4-5, HNC, HND, RSA Higher Diploma, BTEC Higher level, Foundation degree (NI), Professional qualifications (for example teaching, nursing, accountancy)
- Other qualifications: Vocational/Work-related Qualifications, Foreign Qualifications (Not stated/ level unknown).


Economic Activity
All usual residents 16 to 74
1,600
1,400
1,200
1,000
800
600
400
200
0
Economically active: Employee: Part-time
Economically active: Employee: Full-time
Economically active: Self-employed
Economically active: Unemployed
Economically active: Full-time student
Economically inactive: Retired
Economically inactive: Student (including full-time students)
Economically inactive: Looking after home or family
Economically inactive: Long-term sick or disabled



Type of industry residents work in
Usual residents aged 16 to 74.
450
400
350
300
250
200
150
100
50
0
A Agriculture, forestry and fishing
B Mining and quarrying
C Manufacturing
D Electricity, gas, steam and air conditioning supply
E Water supply; sewerage, waste management and remediation...
F Construction
G Wholesale and retail trade; repair of motor vehicles and motor...
H Transport and storage
I Accommodation and food service activities
J Information and communication
K Financial and insurance activities
L Real estate activities
M Professional, scientific and technical activities
N Administrative and support service activities
O Public administration and defence; compulsory social security
P Education
Q Human health and social work activities
R, S, T, U Other



500
400
300
200
100
0
1. Managers, directors and senior officials
2. Professional occupations
3. Associate professional and technical
4. Administrative and secretarial occupations
5. Skilled trades occupations
6. Caring, leisure and other service occupations
7. Sales and customer service occupations
8. Process, plant and machine operatives
9. Elementary occupations

e) Bespoke ONS data for the National Parks and the Broads

- Analysis showing the count, employment and turnover of VAT and/or PAYE based enterprises in the National Parks of England by employment size band (2016)

0-9 Micro			10-49 Small			50-249 Medium			250+ Large			Total		
Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)
365	926	82,023	50	999	64,731	10	..C	..C	5	..C	..C	**430**	**4,068**	**250,317**

- Analysis showing the count, employment and turnover of VAT and/or PAYE based enterprises in the National Parks of England by Broad Industry Group

Agriculture, forestry & fishing			Production			Construction			Motor trades			Wholesale			Retail			Transport & Storage (inc. postal)			Accommodation & food services		
Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)
65	232	29,480	25	246	11,151	50	296	30,558	10	..C	1,934	20	..C	9,626	40	1,023	71,646	10	143	19,709	40	380	14,048

Information & communication			Finance & insurance			Property			Professional, scientific & technical			Business administration & support services			Public administration & defence			Education			Health			Arts, entertainment, recreation & other services		
Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)	Count	Employment	Turnover (£'000s)
10	..C	..C	5	..C	..C	20	58	..C	50	141	8,521	40	123	8,776	5	..C	..C	5	..C	..C	5	310	8,428	30	483	17,338

Total		
Count	Employment	Turnover (£'000s)
430	**4,068**	**250,317**

- Analysis showing the count, employment and employees of VAT and/or PAYE based local units in the National Parks of England by employment size band (2016)

0-9 Micro			10-49 Small			50-249 Medium			250+ Large			Total		
Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees
400	1,047	..C	60	..C	1,171	15	1,478	1,478	5	..C	..C	**480**	**4,371**	**4,139**

- Analysis showing the count, employment and employees of VAT and/or PAYE based local units in the National Parks of England by Broad Industry Group (2016)

Agriculture, forestry & fishing			Production			Construction			Motor trades			Wholesale			Retail			Transport & Storage (inc. postal)			Accommodation & food services		
Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees
70	238	149	30	297	287	45	251	234	10	..C	27	20	..C	..C	45	684	655	15	166	160	50	524	494

Information & communication			Finance & insurance			Property			Professional, scientific & technical			Business administration & support services			Public administration & defence			Education			Health			Arts, entertainment, recreation & other services		
Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees	Count	Employment	Employees
15	..C	..C	5	4	..C	25	51	46	50	158	147	40	214	198	5	..C	..C	5	..C	..C	10	496	496	40	612	604

Total		
Count	Employment	Employees
480	**4,371**	**4,139**

C - That means the data has been redacted due to confidentiality. It could expose business data. For example, if there is only one business in an area, it can get redacted as it will show turnover and employment data.

TURNOVER
Turnover provided to the ONS for the majority of traders is based on VAT returns for a 12 month period. For 2016 this relates to a 12 month period covering the financial year 2014/2015. For other records, in particular members of VAT group registrations, turnover may relate to an earlier period or to survey data. For traders who have registered more recently, turnover represents the estimate made by traders at the time of registration.The turnover figures on the register generally exclude VAT but include other taxes, such as the revenue duties on alcoholic drinks and tobacco. They represent total UK turnover, including exempt and zero-rated supplies.

EMPLOYMENT
The employment information on the IDBR is drawn mainly from the *Business Register Employment Survey* (BRES). Because this is based on a sample of enterprises, estimates from previous returns and from other ONS surveys have also been used. For the smallest units, either PAYE jobs or employment imputed from VAT turnover is used.

EXCLUSIONS
Approximately 7,805 Composite and Managed Services Companies have been excluded where the address does not represent the location of the activities of these businesses to avoid giving a false impression of growth in these locations. Identification of Composite & Managed Services Companies may be incomplete, inflating business counts primarily in the Professional, Scientific & Technical sector. Further details on Composite and Managed Services Companies can be found on the HM Revenue & Customs website: http://www.hmrc.gov.uk/employment-status/msc.htm

- Analysis showing the count of VAT and/or PAYE based enterprise births and deaths in the National Parks of England by UK SIC 2007 Section for 2015

Sector	Births	Deaths	Growth or decline?
Mining, quarrying and utilities	5	0	g
Manufacturing	40	35	g
Electricity, gas, steam and air conditioning supply	5	0	g
Water supply, sewerage, waste management and remediation activities	0	5	d
Construction	85	70	g
Wholesale and retail trade; repair of motor vehicles and motorcycles	65	75	d
Transport and storage	20	20	even
Accommodation and food services	80	75	g
Information and communication	60	25	g
Finance and insurance	5	15	d
Real estate activities	20	15	g
Professional, scientific and technical	140	105	g
Administrative and support services	70	65	g
Education	10	5	g
Human health and social work	30	15	g
Arts, entertainment and recreation	15	15	even
Other service activities	25	25	even
Total	675	565	g

Appendix D: Interviews with some larger organisations which operate within the Broads.

Interviews were conducted with 5 of the largest organisations that operate within the Broads.. It is acknowledged that there are many other organisations that operate within the Broads, but it was considered useful to interview those with the largest number of employees and/or turnover to provide a snapshop of the economy. Those businesses interviewed cover retail, hire boat, tourism and industry and therefore cover many aspects of the economy of the Broads.

Latham's of Potter Heigham/QD

Latham's is a large retail outlet located at Potter Heigham Bridge area. It sells gardening products, food, drink, household goods.

Paul Lemmon, 30 May 2017

1. Business name:
   - Latham's/QD

2. Location:
   - Potter Heigham Bridge

3. Core business:
   - Retail. Let out some retail space. Apart from main building, also the fishing tackle shop.

4. Locally owned/run?
   - Head Office in Norwich. Consider themselves a Norfolk based business.

5. Expanding/contracting?
   - Have closed a number of sites as they are not viable any more.
   - Latham's is different as the site is freehold.
   - Other stores are leased.
   - Lots they would like to do there and want to help the local area e.g. through a pedestrian crossing.

6. Planning – enable or stifle?
   - Have worked closely with the Development Management Officers in the past.
   - Accept the area is special and sensitive.
   - Going by past dealings, BA is supportive and commercially minded.
   - Found the experience straight forward.
   - BA understands and accept business needs.
   - Pre-application planning service is very good.

7. What are the advantages/disadvantages of operating in Broads area?

+ captive audience. But petrol prices does affect customers willing to travel.
+see themselves as part of the community
+part of history of the Broads which is why the store is still called Latham's.
+Benefits of being associated with the Broads.
- Site is difficult to service and supply due to road network, but this has got better.
- Complaints from people new to area who don't understand how busy the Bridge area can get.

8. Any existing barriers to growth
   - There is no available land to buy.

- There are things they want to do to the site, but mostly aesthetics.
- Other changes are cost prohibitive due to land stability and flood risk.

9. Willingness to invest in people and plant/stock
    - Latham's is an important part of the business
    - Staff mostly locally employed.
    - Staff tend to have local connections and stay with company for many years.
    - People have worked their way up and many seem to have passed through Latham's as part of their career.
    - 70 employed (including cleaners etc.)

10. Is the commercial accommodation available for growth
    - Land is limited.
    - Parking is an issue – have sought to restrict length of time people can park.
    - Feels the Potter Heigham Bridge area is dying a little bit.
    - Do work with local community.

Barnes Brinkcraft

Barnes Brinkcraft's most prominent operation is as ahire boat and holiday accommodation provider, but they also have an arm of the business that sells boats. They have branches throughout the system. They are one of the larger hire boat operations in the Broads.

Daniel Thwaites, 23 May 2017

1. Business name:
    - Barnes Brinkcraft

2. Location:
    - Hoveton

3. Core business:
    - Hire boat and property and boat sales (two arms of the business)

4. Locally owned/run?
    - Yes.
    - Various bases in the area, including in Brundall.

5. Expanding/contracting?
    - Positive but not easy.
    - Recently taken over two businesses.
    - Success is despite of the Broads Authority (e.g. tolls and hire fees).
    - BA could help more.
    - Hire industry used as a cash cow to fund inept organisation. Would like BA to be more value for money and run on a commercial basis.
    - BA not efficiently run.
    - Was lots of places to get rid of rubbish, but BA and District Councils blame each other and should say what is going on. No one is sorting the issue.

6. Planning – enable or stifle?
    - Acknowledges area is special.

- Weird ideas for example cladding with corrugated iron.
- Need to move with times.
- A hire boat business needs at least 50 boats to make it viable. Last thing people want is just anything put up, but what about derelict sheds around the area? More allowance for businesses changing. More realistic and more understanding.

7. What are the advantages/disadvantages of operating in Broads area?
   - In area equivalent to a National Park, but this can be restrictive. Got to be located by the water – cheaper to be elsewhere, but struggle to run boats.

8. Any existing barriers to growth
   - Skilled labour
   - Price of property and second homes – difficult for employees to find a house.
   - Bureaucratic restriction e.g. minimum wage. Market forces usually determine wages.
   - Tolls a barrier – pay a disproportionate amount
   - Lack of moorings. Private boats do not leave a space to then be used by another boat unlike in boatyards.

9. Willingness to invest in people and plant/stock
   - Yes. Invested tremendous amount into business. Brought two businesses.

10. Is the commercial accommodation available for growth
    - Not really.
    - Have bought other places but that is not easy.
    - Likely to build what they need themselves.

11. Overall patterns of boat usage and numbers
    - Business expanding and doing well. Bookings are up. But is fragile. Does not take much to have a drop. Tolls and Planning not geared to small businesses expanding.

12. What would like to see more of?
    - More money and less bills! Moor moorings. Less bureaucracy. More flexibility. Another body to buy tolls from.

13. Moorings – what should we do?
    - Allow more moorings. Don't always get permission.

14. General comments.
    - Economy of the Broads is good.
    - Fewer people want to go abroad. Europe is expensive.
    - But this will not go on forever. Will turn around and then be a problem.
    - Rubbish is an issue.

Broads Hire Boat Federation

Part of British Marine, the BHBF are an umbrella organisation that represent many of the hire boat companies that operate in the Broads.

Tony Howes, 2 June 2017

1. Business name: Broads Hire Boat Federation – trade association. Part of British Marine.

2. Location: An umbrella organisation for Broads hire businesses.

3. Core business: Cabin hire cruisers and yachts, day launches.

4. Locally owned/run? Local to the Broads, part of British Marine.

5. Expanding/contracting?

Over recent years, hire boat industry contracted, but now static. Change down to market demand and changing holiday habits. Early 1900s, many more hire boats than private boats. Broads boating offered a rare British adventure holiday. There has been a continual decline in the numbers of Broads holidays sold and the average weeks booked up to 2 years ago. Now with pound weak and other overseas travel worries, business has stabilised and improved. Last year reached an average of 22 weeks. Looking good for this year.

6. Planning – enable or stifle?

Does not really stifle from BHBF over view. But some individual organisations think it does. Planning is complex and difficult and mind blowing. Many members think the BA is over zealous in protection of certain aspects. Rigid adoption of no building in flood plains for example has major implications. Members want to do things they deem reasonable but may be contrary to local and national policy.

7. What are the advantages disadvantages of operating in Broads area?

For businesses to succeed navigation needs to be viable and maintained and not spoiled. Wrong or unreasonable decisions can harm viability.

8. Any existing barriers to growth

Market demand and financial. Some opportunities subject to planning regulation. Most have premises but may seek to acquire additional or change use of existing. Businesses understand what the BA is trying to do regarding the special qualities.

9. Willingness to invest in people and plant/stock

All members are seeking to make businesses financially viable and healthy.

10. Is the commercial accommodation available for growth

Not normally – growth matched by additional facilities.

11. What would like to see more/less of?

More short stay visitor moorings in places with services and facilities e.g. Horning village.
More navigable water space for boating – issue of closed Broads.
Lower tolls and less bureaucracy regarding planning, content with way planning regulations preserve the Broads. But can go too far to preserve what is.

12. Moorings – what should we do?

Specific example mentioned was the potential for a pontoon for moorings at Ranworth, but landowner objected. Feels like land owner attitudes are an issue in relation to delivering more moorings.

13. Annual report?

BHBF have a business plan and the Chairman makes an annual report at the AGM.

Bewildwewood

BeWILDerwood, located near Hoveton/Horning is an outdoor and education centre aimed at school children. The Centre is based on books by Tom Blofeld and set in a wooded area.
Ben Jones, 23 May 2017

1. Business name:
   - Bewilderwood

2. Location:
   - Hoveton/Horning

3. Core business:
   - Outdoor adventure and education centre.

4. Locally owned/run?
   - Yes.
   - At that location as owner owned land and diversified from farming.

5. Expanding/contracting?
   - Very positive.
   - Last year was best year ever.
   - Norfolk more of a destination for staycation.
   - Region is more accessible to south east.
   - Offer targets families – parents will always spend on children.
   - Worked on brand and also linked with education.
   - Around 20% more expensive to go abroad that a year ago and this means internal tourism increases.

6. Planning – enable or stifle?
   - Understands reasons for policies.
   - But feels not enough appreciation from BA of what businesses must to do to continue to progress and be successful
   - Would be beneficial to shift policies to working together more and if possible, be more flexible with individual businesses
   - Can be stifled by red tape when wanting to do small projects.
   - Surprised no form of PDR for businesses.

7. What are the advantages/disadvantages of operating in Broads area?

+ in an area that is already an outdoor destination. Bewilderwood is complimentary to that.
+ Bewilderwood brings lots of people to the Broads which is beneficial to the region and brings an appreciation of the environment – allows people to get into the Broads in a managed way
- Policies seem to be focussed on protecting rather than allowing growth in a considered manner that allows accessibly and are delivered in a way that considers the setting
- Feel that if were located elsewhere, would be able to do more

- Some particular issues:
  - Back road cannot be used but for emergencies and limited number of deliveries. Therefore, had to build own access road.
  - Screening – lots of time and energy for something with limited benefit to anyone – be it the business or those for which the screening was put in place.

- Permitted Development Rights (lack of) – cost of applications and time for small things that are needed but would have little impact

8. Any existing barriers to growth
    - People's spend if income is squeezed. May stop going on holiday.
    - Change in habits – onset of technology.
    - new attractions elsewhere.
    - Funds and investment
    - Weather.
    - Customer base. Holidays are busiest periods but these are short.

Planning is not a barrier. Does not feel as though fighting against policies. But planners need to appreciate business' remit and recognise we value the environment with which we are in. Need help to understand planning and are willing to learn.

9. Willingness to invest in people and plant/stock
    - Always trying to develop people through building and training skills
    - 200 seasonal staff every year.
    - Tends to be 16 to 19 year olds.
    - Training provides key skills that can help in future and is important to our brand so that customers have a great day out with our team
    - Can struggle to employ people due to location and hard to be competitive with bigger companies.
    - Not as many people in Norfolk – small population.

10. Is the commercial accommodation available for growth
    - Build what need if can depending on our continuing success
    - Opening another park elsewhere – Cheshire.

Cantley Sugar Beet Factory

Probably the largest single site industrial area in the Broads, the Sugar Beet Factory has been located in the Broads for over 100 years and not only employs around 200 people directly, but supports the agricultural industry in the area.

Ian Redhead, 9 June 2017

1. Business name:

Cantley Sugar Beet Factory

2. Location:

Cantley, Norfolk

3. Core business:

Sugar beet processing, sugar production, pulp for anaerobic digestion and ingredients for bioethanol production.

4. Locally owned/run?

British owned. One of four manufacturing bases in UK.

5. Expanding/contracting?

As a business as a whole, in next four years will be at a cross roads as from October 2017 sugar production will be deregulated. Whereas whilst in the sugar regime there was a regulated market in the EU which set out how much sugar could be sold, over the last few years there has been a reduction in how much sugar to produce. From October, will be competing with EU producers. There will be pressure on the sugar price which will reflect the world price. This is an opportunity, if the market is right, to grow the business. Depends on supply and demand – especially relating to how well crops around the world do.

New Government and Brexit – uncertain. Note podcast by British Sugar Managing Director: https://blogs.spectator.co.uk/2017/02/brexit-sweet-british-beet-sugar-industry-european-union/. Trade agreements could work either way.

For the site, they will continue to do what they do now and invest in the right opportunities. Things are stable at the moment. Invest in efficiencies to help produce sugar for less cost. British Sugar is well placed as it has one of the lowest costs to produce sugar in Europe.

6. Planning – enable or stifle?

Not much bureaucracy in terms of planning.
Generally supportive – helpful and give good advice. Content with the site specific policy. Agree with focus on employment – their site plans aim to secure employment.

7. What are the advantages disadvantages of operating in Broads area?

Here since 1912.
Other sites have issues of large population being nearby.
Cantley does not have that issue, but has to consider the potential impact of the site on European Sits which are very close.
They have to be aware of where they are.
Benefit of using the river occasionally for transporting materials.
Field to factory mileage is low.
Visitors often remark on the views and it being a nice place to work!

8. Any existing barriers to growth

River and railway makes things more challenging.
Work near the railway has risks and a cost to mitigate these risks.
Access and shape makes things more expensive.
In flood plain – flooding and ground conditions. Have to understand and manage tides.
But there is the opportunity to grow the length of time they operate.

9. Willingness to invest in people and plant/stock

Yes, invested heavily over last five years in capital projects.
Workforce turned over – big people change. Spend a lot on training and succession planning. Have lost more experienced workforce.
Regular intake of apprentices and graduates.
Have recruited more in last three years that previous thirty years.
Have an active apprentice programme.

10. Is the commercial accommodation available for growth

Tend to buy readymade kit and install.
Tend to put things in and take them out.

11. What would like to see more/less of?

More local talent retained into local businesses.

More willingness for people to move to the area – businesses could do more to retain talent in Norfolk.
More promoting of business. Good story to tell. Push the fact that it is British Company and British Food.

12. General

Near zero waste from the process – good sustainability story.
Bioethanol – products from Cantley are part of manufacturing chain.
Pulp – goes to anaerobic digesters.

Appendix E: Analysis of Survey of Businesses that operate within or near to the Broads

Broads Authority Local Plan
Business Survey
April and May 2017
Analysis

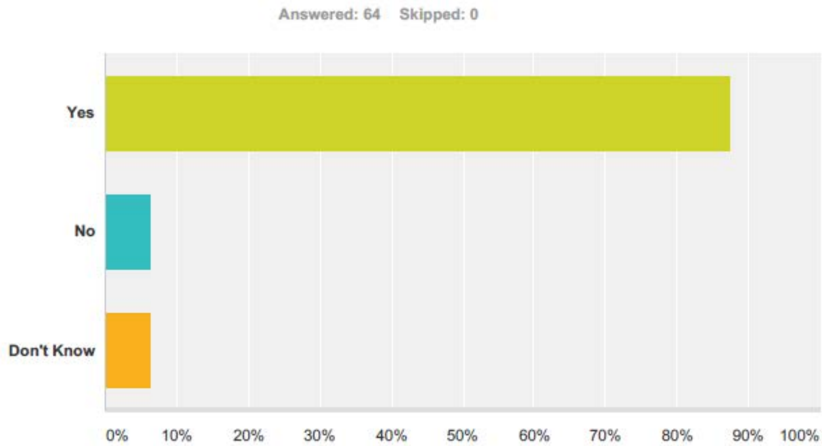
Introduction

A Business Survey[18] was produced to gather some primary data on the businesses that operate within the Broads Authority Executive Area.

The Broads Authority Executive Area is covered by certain postcodes. Part of a postcode area might be in the Broads and part out of the Broads. As such, we found out which companies paid business rates within the postcodes that are relevant to the Broads Authority Executive Area. We then searched for contact details for those businesses. So businesses asked to fill out this survey may or may not be within the Broads.

Around 500 businesses were contacted and asked to fill out the survey. 64 businesses responded. This document assesses the responses received.

Do you operate within the Broads Authority Executive Area?



What does your business do?

- Art Gallery
- Boat hire, canoe hire , boat repair, boat safety, gas safety, information.
- Boating Holidays
- Boatyard, moorings, storage, dayboats, caravan site (5), houseboats.
- Boatyard, specialising in the machinery (engines gearbox's etc)fitted to all types of boats
- Broads holidays, boat sales and estate agents
- Creation, management and publication of design and building data.

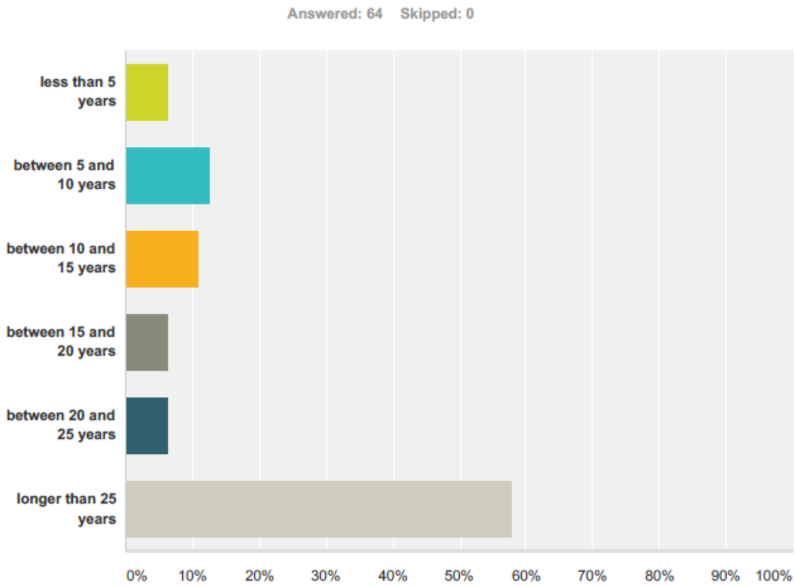
[18] The survey can be found here https://www.surveymonkey.co.uk/r/977FTWP

- Catering.
- Charity Shop
- Conservation Charity
- Cycle Hire
- Day boat & canoe hire, moorings
- Engineering
- ESTATE AGENTS
- Farming, Industrial Units, Storage Containers
- Fire Protection
- Furnished holiday letting
- Garage services
- Hire of Houseboats on River Ant
- Holiday let
- Holiday park and marina
- Holiday Park for Tourist
- Hospitality and tourism
- Hotel and resturant
- I own a boathouse for my personal use - I am listed as a business because I am forced to pay business rates. This is totally unfair.
- IT Consultancy
- Mail order classic motorcycle spares
- Manages 220 riverside properties
- Manufacture yachts and motor boats
- Marina and boatyard
- Marina and boatyard with boat building and repair business.
- MARINA AND HOLIDAY HOMES
- Marketing agency
- Moorings for privately owned broads motor cruisers
- Motor caravan accommodation
- Oil and watercolour paintings , Prints and cards, work in progress.
- Open Air swimming
- Outdoor activity & environmental education centre
- Outdoor Adventure Park
- Pottery
- Precision Engineering
- Private Moorings
- Produce Sugar
- Property developers
- Provide facilities and access to Hickling Broad for the purpose of Windsurfing for Club members.
- Provide mooring berths for private boats.
- Provides Foster Care services to Local Authorities
- Public House
- Restaurant/Tearooms

- Retail gift shop, and also clothing printing and embroidery on a retail and wholesale basis
- Sailing Club
- Sailing Yacht hire
- Sailmaker
- Self Storage Hire Business Units to local businesses, dairy, Milk delivery
- Specialist local publisher
- THE VILLAGE HALL IS A FACILITY FOR GROUPS IN THE VILLAGE
- Travel agent
- We are a charitable trust and a tourist attraction
- Hickling Visitor Centre enables people to experience the Reserve and learn about the species that live there

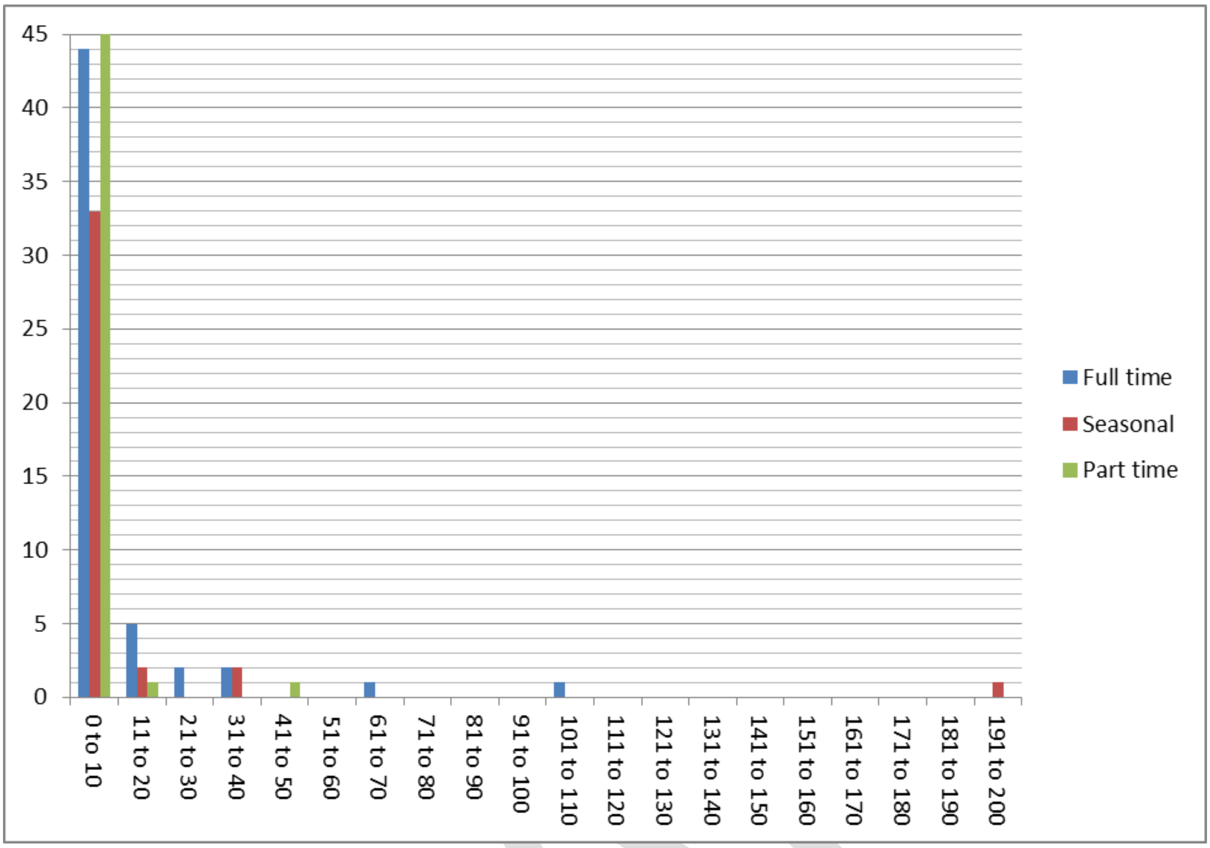
A variety of business sectors filled out the survey, but the majority seem to relate to the outdoors and use of the water.

How long has the business been operating in the Broads?



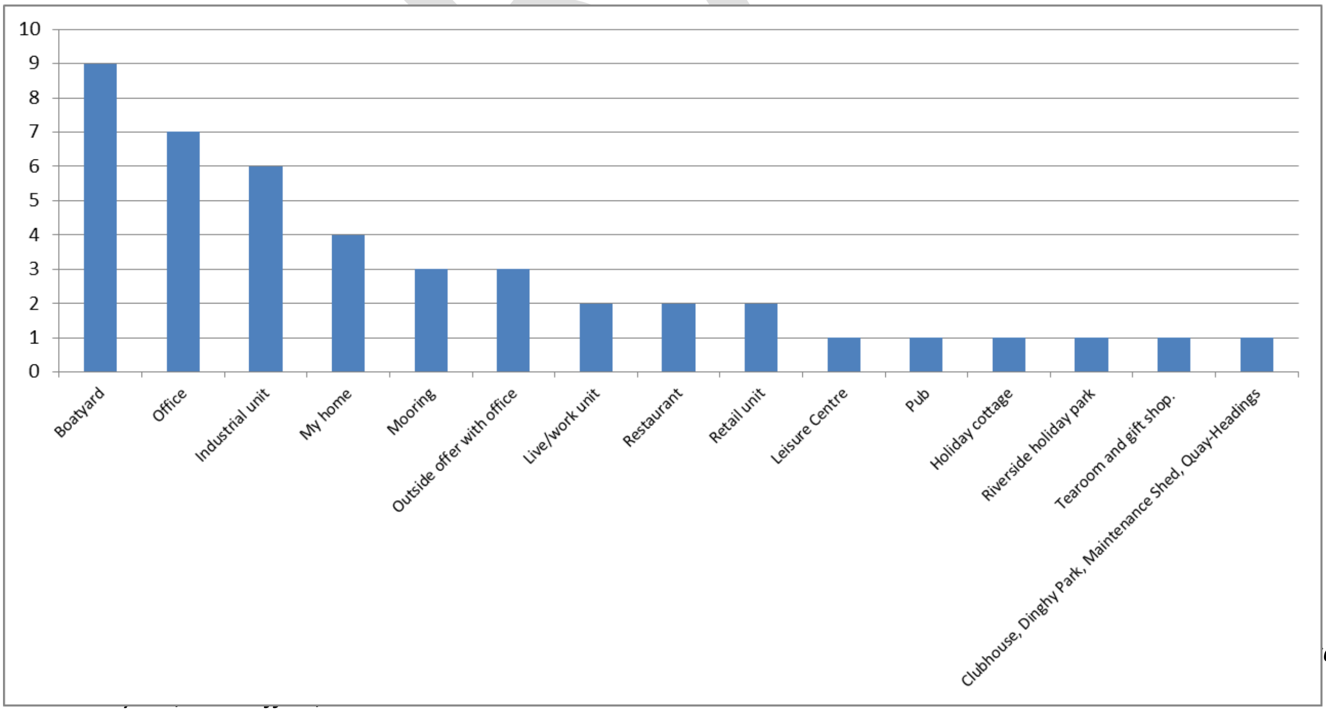
The majority of the businesses that responded have operated in the Broads for over 25 years.

Number of employees and status.



The vast majority of the businesses that responded employ a few people only (less than ten).

Type of business premises



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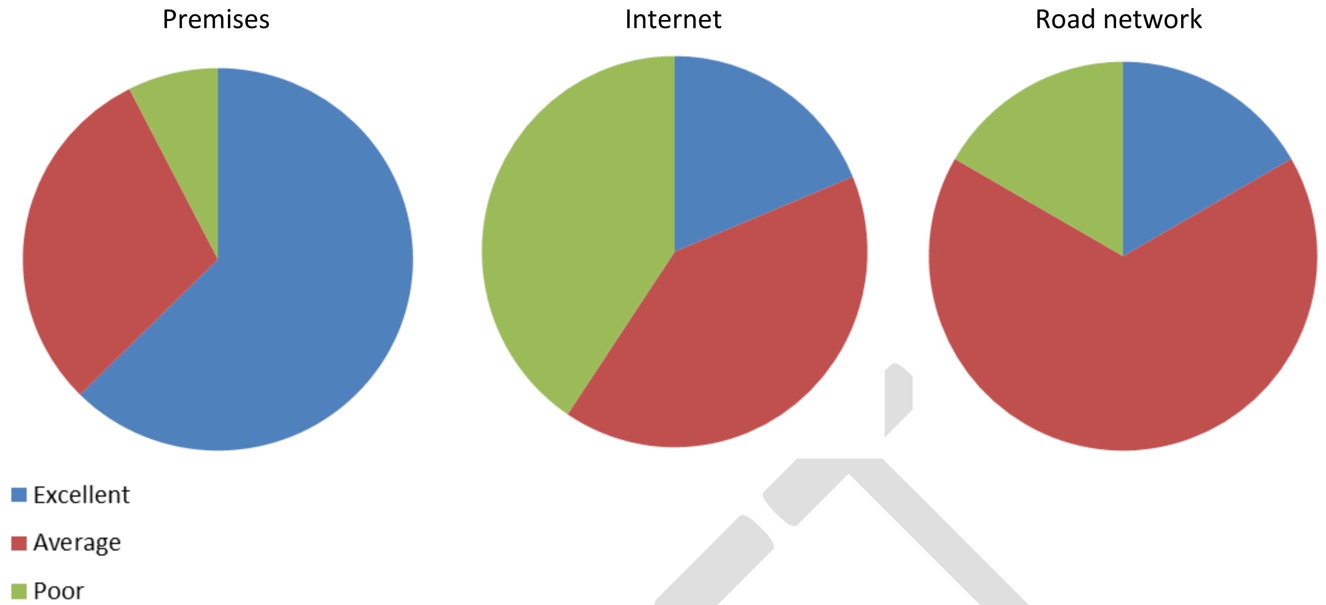
How would you rate the quality of…?

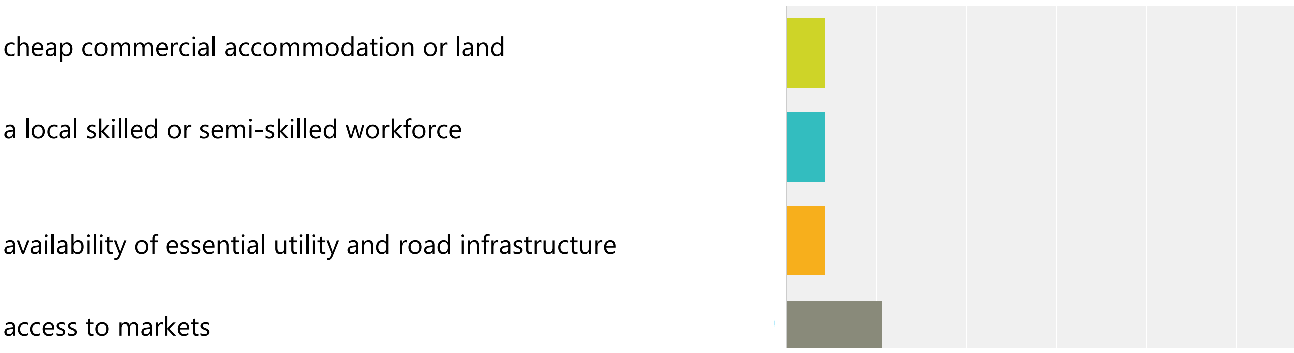


Respondents seem to be content with the premises itself. The internet in the area is poor to average and so too is the road network although this depends on location and need.

Comments received:

- Area is not too overcrowded (at the moment) and easy to get to onto A47
- BT internet is rubbish so are the roads in Horning. Unsuitable for commercial traffic
- BT Open Reach has taken over 1 year for a phone line in Horning.
- Could do with faster internet
- Good road networks and beautiful office settings.
- Having fibre leased line installed soon
- I need to use Vodafone Sure Signal for mobile reception
- Infrastructure quality is poor
- Intermittent internet, minor narrow roads
- Internet is very slow. Public transport is non-existent.
- Internet speeds are very slow and service is inconsistent
- It is old and out of the way
- It's a rural area with poor investment
- It's a single lane, we are at the bottom of the road/line
- Lack of enthusiasm from Norfolk County Council.
- My choice
- No internet has been installed at the boat yard
- Norfolk's broadband network is always years behind the rest of the country and we are located out of the main urban areas
- Not enough money spent by B.A on keeping moorings repaired
- Our precinct needs updating, although we have refitted the branch internally. Broadband is very slow.
- Perfect for our business
- Poor internet/average roads due to location; average premises due to being riverside in Natural habitat
- Premises are appropriate; the internet is appalling and the roads are drivable
- Premises need repair, internet is pants, and roads are rural
- RESTRICTIONS FROM LOCAL PLANNING
- Road access for large yachts is poor. Premises are 40 years old and are not adequate for modern large yachts
- Road network will be excellent when NDR is complete
- Takes forever to download anything or get anywhere
- The internet often stops working entirely
- We're just before major pub upgrade, rural roads as expected
- My building is excellent, because it is pretty and works. My internet is average because it keeps dropping out and my road network is better than average because the council keep digging it up!

Why is your business located within the Broads?



access to supply chains

historical reasons (such as it is an inherited family business)

Lifestyle

my business is linked to the Broads experience

The main reasons for a business being located within the Broads reflect historical reasons as well as being linked to the Broads Experience.

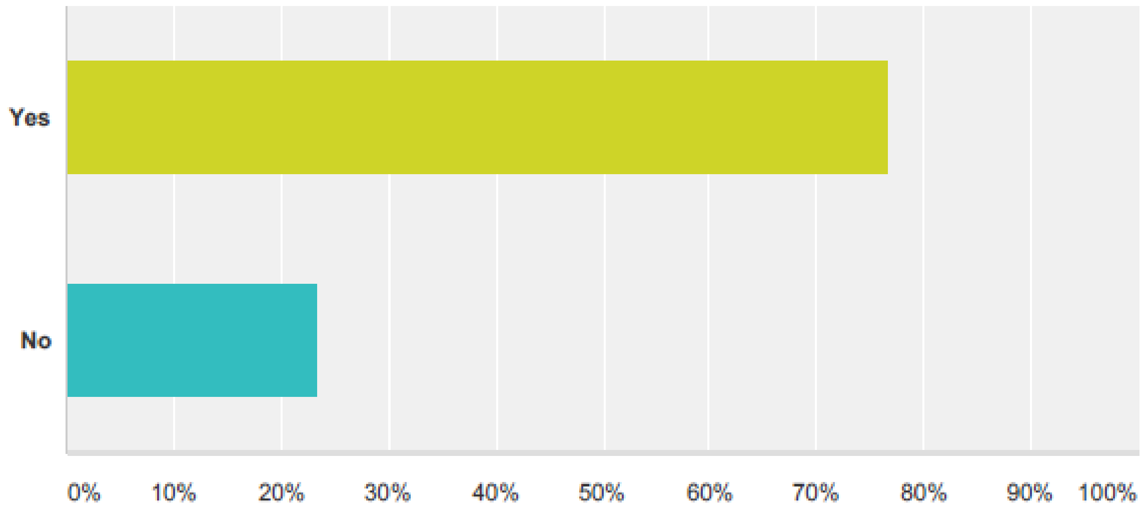
What factors influenced you to choose the PREMISES in which you operate?

- Property suitable for holiday letting.
- Geographical proximity and a wish to support the boatyard and marina which under previous ownership had declined.
- Woodland setting and marsh suit our operational needs perfectly.
- Available, just came up.
- The premises were purchased to run a hire fleet. This was the purpose for which the site had been developed, and was reasonably new at the time. The business changed from hire craft into private moorings.
- It is on the reserve itself
- Own the premises and live on site
- The space we have is ideal for the type of business we run
- I bought the existing business
- Location
- Size, facilities, car parking, internet, quality of office, location for access for staff
- Small boatyard
- Near to my home
- Inherited it
- We are a charity set up to take care of this historical fleet of Hunter's Fleet
- RIVERSIDE LODGES AND MARINA
- Good car parking plus access to reasonable network of cycle routes
- Peace and quiet.
- Close to home, affordable.
- Type of business wanted and location
- Proximity and access to Hickling Broad
- We bought the company in 2014 and were looking for a boatyard to suit our needs.
- Historical
- The holiday property was available when I chose to set up holiday let business
- Village centre location with good shop window and pedestrian footfall.
- It was cheap and big.
- Custom-built for purpose of Sailing Club
- Already established

- Contract with Herts County Council (who have run the Centre since 1970s)
- Central to the village
- Purchased the marina basin and boatyard securing its future.
- Adjoins existing business & home
- Commercial opportunity
- Historical
- Property in Horning
- Accessibility for clients to get to our offices
- We have been on this site for over 70 years.
- Location primarily
- I live there and love the area
- Local to home
- Good opportunity to buy land with potential for development

A variety of reasons are given for choosing the actual premises ranging from liking the area and cost to acquiring the property and it being near to home.

Do you have enough space?



- Customers expect more space; business needs to grow to be sustainable
- Property sleeps 4 people
- Additional boatyard sheds may be required as business picks up and depending on the success of upgrading the existing marina, a new marine might be needed in the future.
- Used to small spaces
- We are only a small team and most are out on the reserve
- Would like more mooring space
- 130 acres
- We need a bigger workshop but don't have the money to expand it.
- It's adequate
- DO NOT REQUIRE LARGE OFFICE
- 30 years of experience and steady membership levels

- I purchased the property as it was fit for purpose
- Because we haven't filled it yet.
- Currently extending 1st-floor facilities since nil room at Ground floor because on flood-side of bund
- Poor car parking
- Never had any complaints
- We may need to consider expanding the marina in the future.
- Restricted by amount of land - have purchased land away from premises to use as storage
- Because it is large enough
- Premises have room to grow into.
- Site is now surrounded by houses and we cannot expand
- As a pub there's enough space
- We need more moorings due to being 50% over subscribed

Needing more space reflects the particular circumstances of the business. Some responded saying they would like more space and others are content with the size of their property.

What are the advantages / positives / benefits /opportunities of operating a business in the Broads?

- Rivers and Broads are attractive in their own right, people love being near and on water, walking is growing in popularity, guests have increasing awareness of natural environment, peace and tranquillity of the Broads is a major draw.
- Attracting visitors to the Broads.
- Our business promotes families getting outside and enjoying the natural world, much in the same way as the Broads.
- We rely heavily on the tourist trade that comes to the region to visit the Broads.
- I like it
- Operating on the broads is not just a business but a way of life.
- Beautiful settings again and unique habitat which attract lots of rare wildlife
- Less competition than in city areas, Nice people to work with and good lifestyle
- The environment is interesting and constantly changing. We see many visitors to the area We are able to offer a unique experience to shoppers because we don't have any real competitors in the locale
- River access to site for large plant delivery
- Local retired people
- Natural Surroundings
- Close to major customer. Good road access for Norfolk for staff from Midlands, reasonable internet connection,
- It is a great location to bring up a family.
- Lots of open space. Community spirit. Businesses work together well.
- None for our type of work
- Launching your boat on the river
- Has a big following/number of visitors
- We have historic boats of non-engine craft which were built specifically for the Broads
- OUR BUSINESS IS FOR VISITORS TO THE BROADS
- Too many to list!
- Nil

- Nice location
- Location and visitors
- Safe and beautiful sailing venue
- Beautiful area, good river network, great wildlife, visitors are generally happy
- The Broads visitors are my guests.
- Always a strong demand for local property
- None.
- Sailing Waters; easily accessed by members; close to conurbation
- Visitors coming to the area.
- Without the Broads we have no business.
- None
- Location - idyllic surroundings
- Tourism and environment
- The total Broads experience
- Tranquillity. Norfolk business's like local traces
- Open spaces nearby
- For our manufacturing purposes there is no real benefit from being in our current position. We are able to maintain a good employee base
- Keeps me in an area I like
- Good quality of life
- None known
- Attractive to boat owners to enjoy the Broads and therefore need moorings

Some responses indicated there were no advantages to operating within the Broads. Others rely on the Broads themselves and the tourists attracted to the area. General theme of the location being attractive.

What are the negatives / issues / challenges /threats in operating a business in the Broads?

- Lack of imagination and understanding of needs of business by planners, rural road network is challenging but a fact of life, flood risk.
- Flooding, bad weather and lack of visitors
- Planning restrictions - whilst appreciated that there is a need to protect the Broads from unappealing developments, it is frustrating the Broads Authority do not support local business that fit well into the area further - by understanding those business's remits and making the planning process as simple as possible.
- The Broads authority
- Security is poor, with more incidents of theft from craft. It is generally felt the Northern Broads take priority over the Southern Broads for investment. With The Broads Authority, The Environment Agency, County Council etc. there are often too many agencies who do not all communicate with each other effectively to enable decisions to be made. Too much administration, not enough action. We in our area have also recently experienced problems with ideas from the general public being supported by the Broads Authority without consideration being given to land owners and the existing use and needs of their businesses.
- Poor connection to servers of the main RSPB headquarters
- Environmental and planning restrictions. However I have found the planning department to be most helpful and they are really trying to help businesses such as mine in the broads

- Trade is naturally affected a great deal by the fall in visitors in the winter
- None
- Wroxham is becoming run down with the empty buildings etc.
- Infrastructure
- Coping with the NDR construction. This is a time limited negative which will turn into a positive.
- Very difficult to improve premises because planning is very difficult & very expensive. Additional expense also as certain materials are dictated.
- Roads and signage is poor, Lack of public transport, Phone signal / internet is poor.
- We are stuck out in the middle of nowhere and therefore when we need engineers to come and fix machines costs are high because of the distances they have to travel
- Paying Business Rates with no allowance for the fact that it is in domestic use
- Road network, broadband
- We are limited to who our customers can be. There isn't much for people to do when they get on the Broads. Not enough showers/toilets, provisions, mooring spots, bins and good places to eat.
- RESTRICTIONS FROM LOCAL PLANNING
- Lack of good facilities for cycling
- The Broads Authority having an obsession in lying about the name of the area. It is The Broads, a member of the National Park family. It is NOT any other name that the BA wants to come up with.
- Rubbish Wi-Fi, road network,   any visitors expect to get a free "visitor experience" without actually spending any money.
- B.A. interferes too much with businesses, not concentrating on the rivers etc. damage caused to them and the environment.
- Increased weed levels
- No specific negatives come to mind.
- Poor mobile phone coverage for me and my guests and staff. Poor internet coverage and speed. Facilities at some Broads
- Access problems caused by traffic
- None.
- Situated on flood-side of Env.Agency Bund; 180º hinterland since situated 'at edge' of UK; poor trunk-road feeders; silting (as result of poor B.A. Planning controls) requires regular dredging.
- Again car parking
- Access to Norfolk is perceived as difficult and expensive (even though _we_ know we're only 2.5 hours from London by road)
- It is important that the Local Plan review sets a clear and positive policy framework for future development investments to be gauged against.
- Too many different authorities to deal with - District/parish/County Councils, then Broads Authority as well - and they don't always have a joint policy. Lack of appreciation by service users of appropriate behaviour (e.g. boat hirers leaving engines running until early hours of the morning, a small proportion of holiday makers behaving very badly)
- Local house prices make it difficult even for myself as a business owner moving near my business.
- Poor mobile and internet signals
- Poor communication by broadband and mobile telephone
- Becoming quite built up and spoiling landscapes

- Expensive rates, unable to expand due to planning restrictions.
- Limited customer base
- Keeping to planning requirements
- All my customers have to travel from afar to reach us
- Overly tight controls on creating new moorings. Changes in wood treatments mean quay headings last less than half the time they used to. Unwillingness for BA to allow natural looking alternative products which last much longer for quay headings

Planning rules, internet and mobile signals, the Broads Authority itself and many different organisations to deal with seem to be common issues.

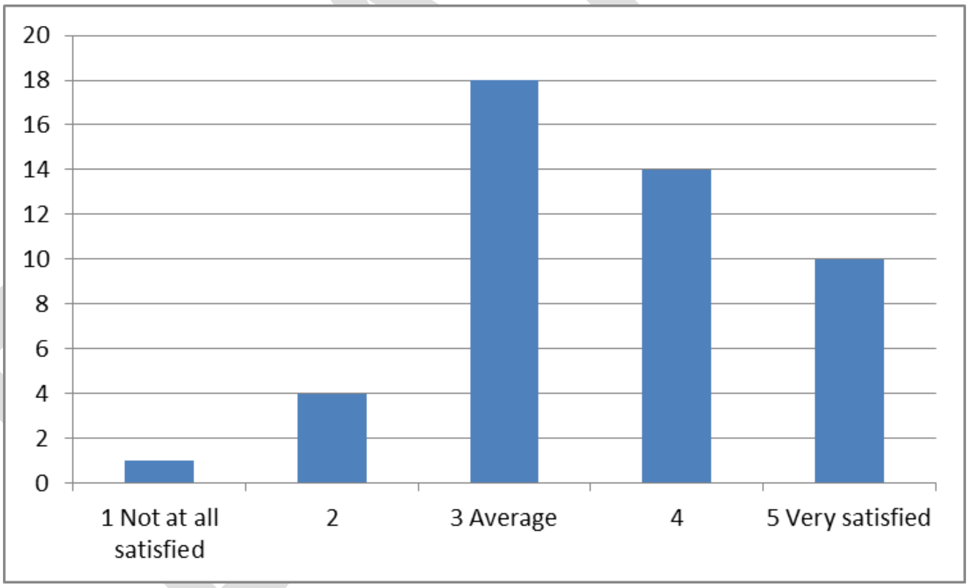
In order to run a successful business in the Broads, I need…

- To be allowed to get on running my business without unnecessary interference
- Holiday visitors
- A positive planning policy framework upon which to orientate investment decisions.
- To continue to develop and change
- It left alone
- Practical understanding and support from the Broads Authority
- Easy signage to reserve
- In order to run a successful business in the broads I need to offer very good facilities and be allowed to grow my business as I have less customer foot fall to draw on compared to larger more urban areas. Dairy needs to offer excellent local products to local customers
- The area to offer a diverse range of attractions and facilities to draw visitors to the area
- Customers with easy parking
- Support from local authorities
- Good internet, access to road network, quality offices
- More customer mooring spaces around southern Broads
- Good transport links
- A reduction in rates
- Better signage and increased partnership between broads businesses
- More facilities for our customers once they arrive
- TO BE ABLE TO DEVELOP MORE HOLIDAY HOMES
- Improved cycle paths and traffic free facilities
- The BA to look after boaters, to dredge the waterways, to maintain moorings.
- A decent phone signal and Wi-Fi
- Support from B.A. not conflict
- Access and navigation to the main sailing area of Hickling Broad
- To implement my vision.
- Better promotion of facilities and experience of The Broads nationally.
- Better Broadband and mobile signals.
- Less red tape to complete.
- Confidence in continual deep (dredged) and clear (weed-free) waters
- More car parking

- Outside investment!
- To be nearer the river
- Positive planning policies so that future development potential/risk can be quantified.
- Transparency & accountability from the policy making powers
- Money ;-)
- Better mobile and internet infrastructure
- Good staff, good communications
- Easy access, good internet (fibre would be advantageous)
- Better premises and infrastructure
- Ability to modify the premises to improve facilities
- People to buy our houses
- Customers
- More moorings

The ability to change the facilities was a common response and linked to this is the planning rules for the area. Better internet and support from organisations like the Broads Authority were also common suggestions.

How satisfied are you with the Broads as an area to operate your business in?



- Promotion of the Broads is still underwhelming despite best efforts, due to fragmented messaging
- Positive feedback from visitors
- We dont operate a boatyard anywhere else so have nothing to compare against.
- A growing number of organisations, which should be amalgamated
- perfect setting again
- very satisfied
- wroxham has become very shabby it needs sorting
- Costs are too high
- I DO NOT THINK THE BROADS AUTHORITY WANT BUSINESS IN THE SO CALLED NEW NATIONL PARK

- You are not looking after boaters, you are not maintaining moorings and dredging is seriously lacking.
- 35 years of continued success as a Club
- We like it here.....
- Cornwall, the Lakes seem to better at encouraging visits, quality of accommodation can be poor and put people off staying.
- We make a healthy profit
- The broads gives nothing to our business.
- Ready market for visitors, popular Market Town
- it's ok so far
- lovely surroundings
- Its no different to the rest of east anglia
- Business is growing but it needs other external attractions such as more local river based restaurants/pubs/cafés

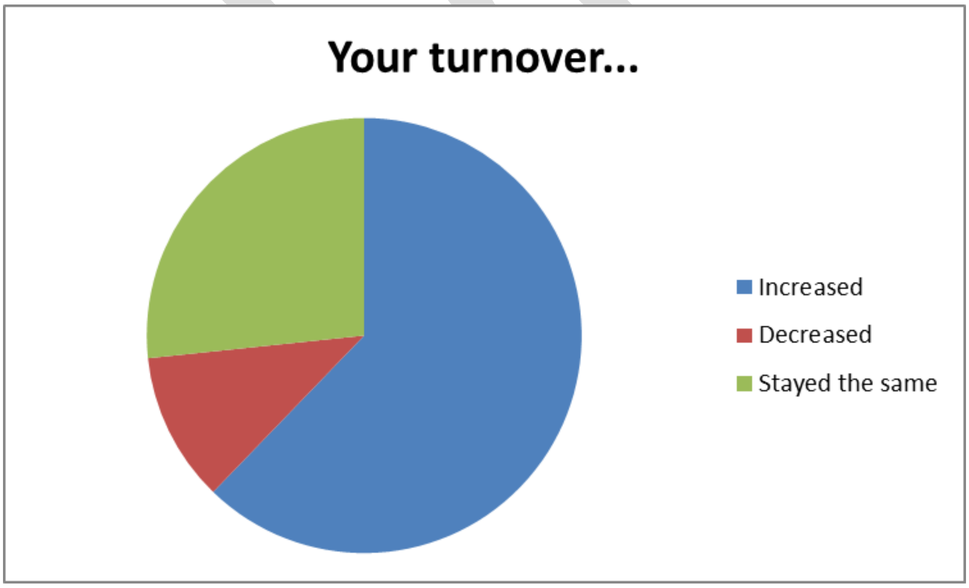
The category with the most responses was average but most were satisfied or very satisfied with operating their business in the Broads.

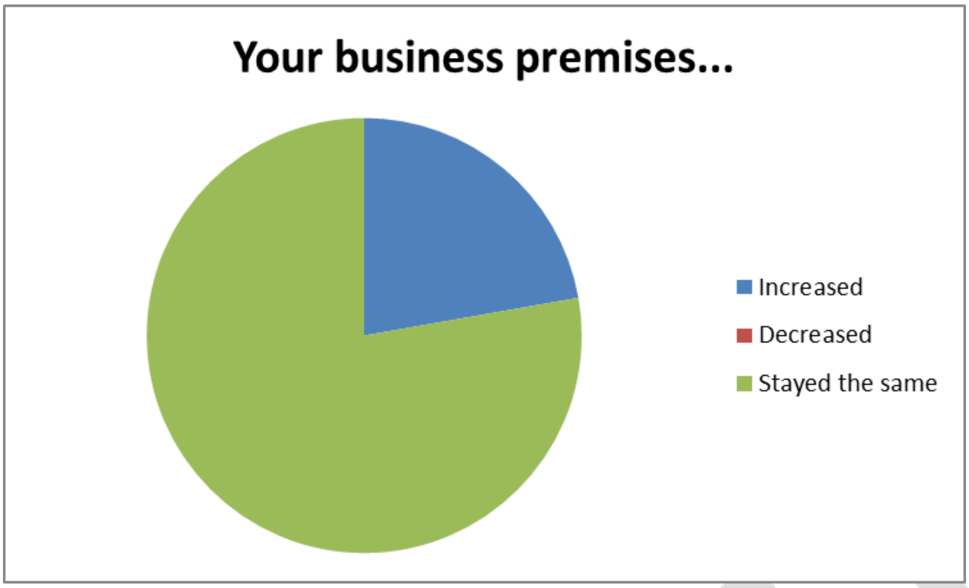
What are the key barriers to growth?

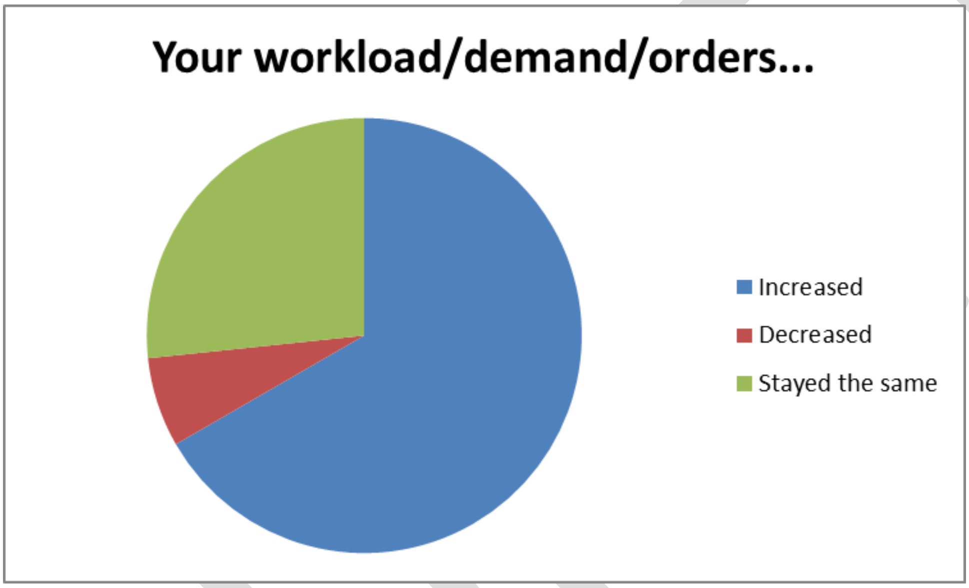
- Beauracracy/red tape, too many licensing and regulatory regimes, too many obstacles preventing speedy planning decisions
- Wet weather and lack of visitors
- Planning uncertainty is one.
- Economy failing, tourism dropping, recruitment issues due to brexit
- Economy
- Lack of practical understanding from planning and environmental agencies
- parking limitations and building restrictions making it hard to improve the infrastructure on the reserve
- Knowing your market and delivering the best possible product/service at a reasonable price
- Our particular location on the main road through Wroxham means that visitors on foot have to cross a busy road to reach us and we know this puts people off. In an ideal world this would be resolved The others businesses in Wroxham are very seasonal so we see a big drop in customers in the winter
- No barriers linked to Broads
- repeat business
- Growth undesirable for area
- At present few. Most of our staff work remotely, so quality of broadband throughout the area is our main issue. It is reasonable at our offices, but less so throughout Norfolk and East Anglia generally.
- Physically, mooring space is limited at our boatyard so we are unable to grow. And financially, tolls are 10% of turnover which is too high.
- Being a charity
- Funding
- High costs
- Lack of partnership, decent broadband, planning restrictions
- for us, not enough room to grow with more boats and not enough funding to help us change the fleet to be easier for 'different' types of customers (people who need engines)
- TOURISM PROVIDING MORE ACCOMODATION FOR PEOPLE TO VISIT

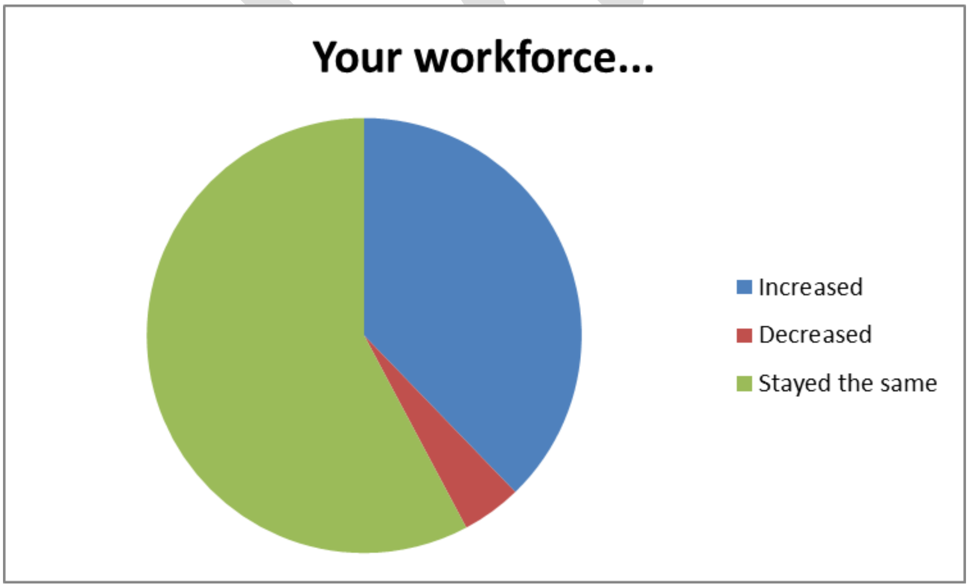
- Limited market
- The Broads Authority.
- Why grow ?
- Size and the Broads Authority. I do not have loads of money which seems to be main criteria for getting assistance/ support from B.A.
- Promotion - of the Club's facilities and windsurfing experience
- Physical space, but we are happy with the business size, will continue to optimise and develop it
- Quality of accommodation Access via A140 is poor More things to do for families, they don't all just want to go for a walk around the The Broads, they want to get on it without paying a fortune for boat hire.
- Competition
- Qualtiy of staff.
- Physical: land-space; Perceptual: sailing is perceived as expensive; Legal: lease & Planning constraints
- Unable to expand
- Being a seasonal business.
- In terms of planning the key barriers would be an inflexible or negative planning policy regime.
- Increased costs - there is a limit to how much service users will allocate for leisure activities, so increased costs cannot always be passed on
- housing for workers and young people.
- VAT rate is too high compared with other international tourism businesses
- Planning permissions
- Limited site space
- Premises a bit worn - need improvements to kitchen, dining areas, possible extra facilities like letting rooms and improved loos.
- Availablility of development land
- Lack of customers
- Lack of moorings... we could easily double in size in 6 months if planning was easier to achieve without the huge quango costs of various surveys

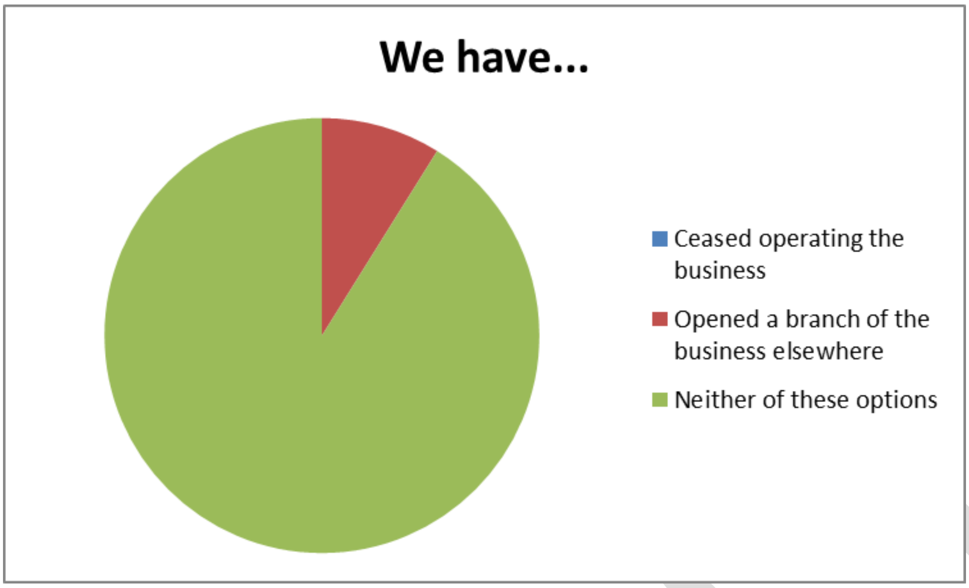
Looking back over the last five years

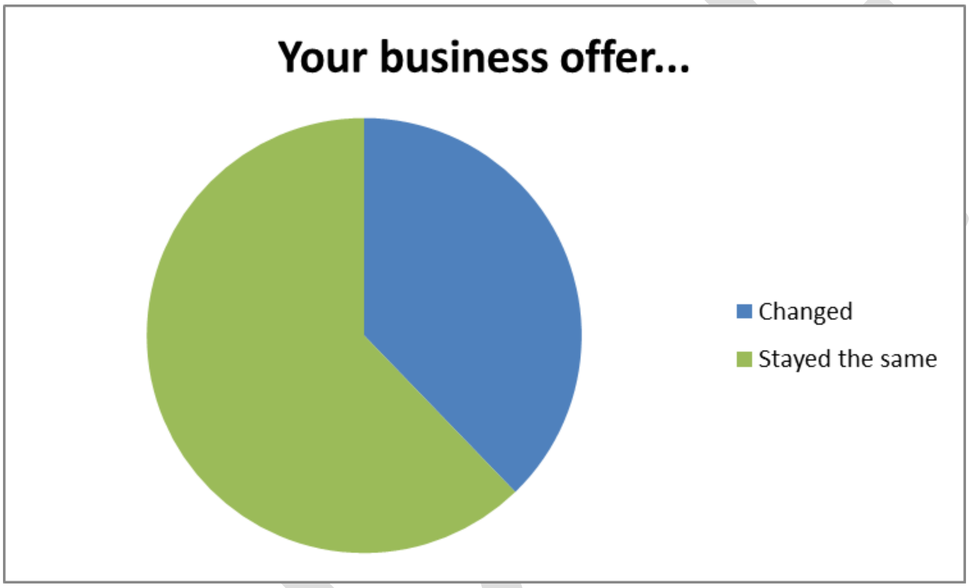


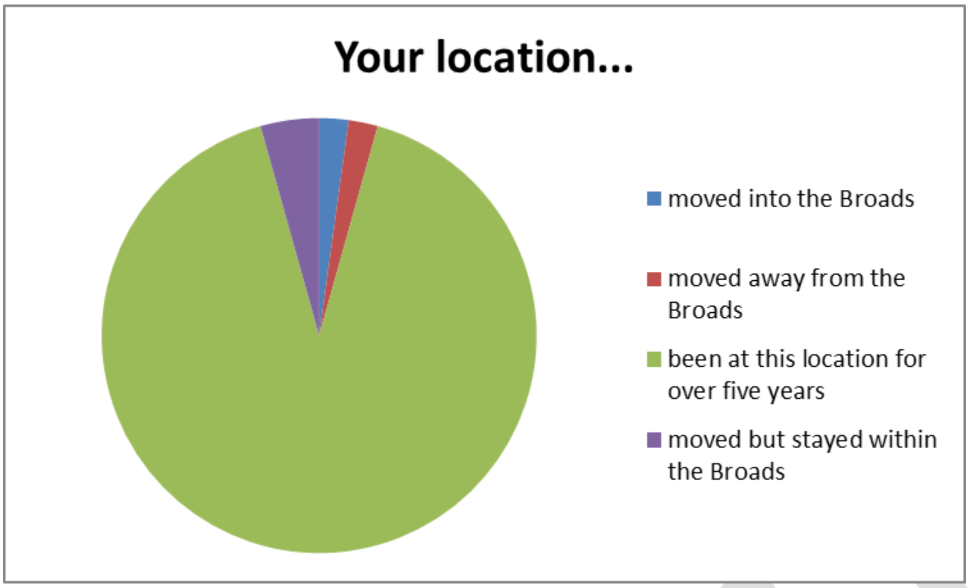

Your business premises...
Increased
Decreased
Stayed the same


Your workload/demand/orders...
Increased
Decreased
Stayed the same


Your workforce...
Increased
Decreased
Stayed the same


We have...
Ceased operating the business
Opened a branch of the business elsewhere
Neither of these options


Your business offer...
Changed
Stayed the same

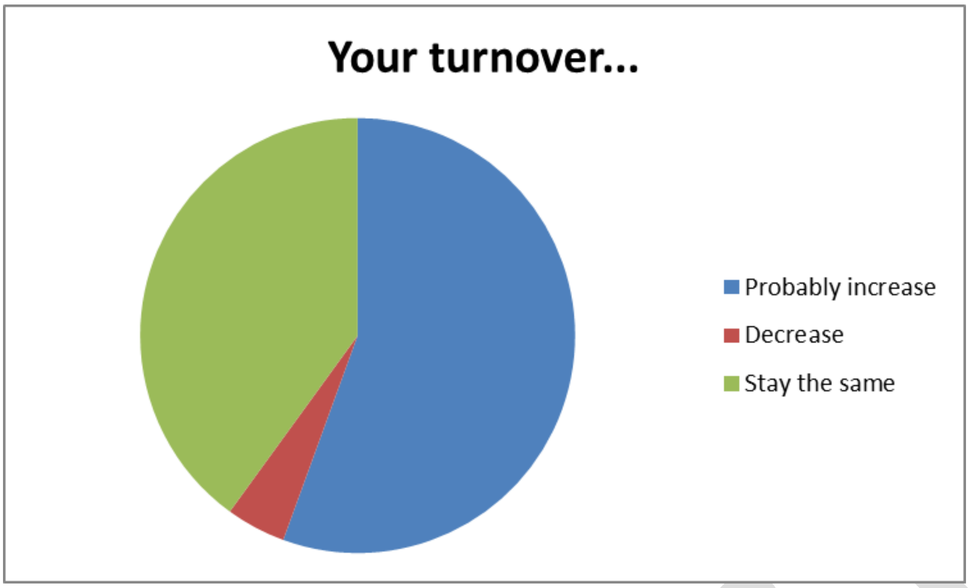


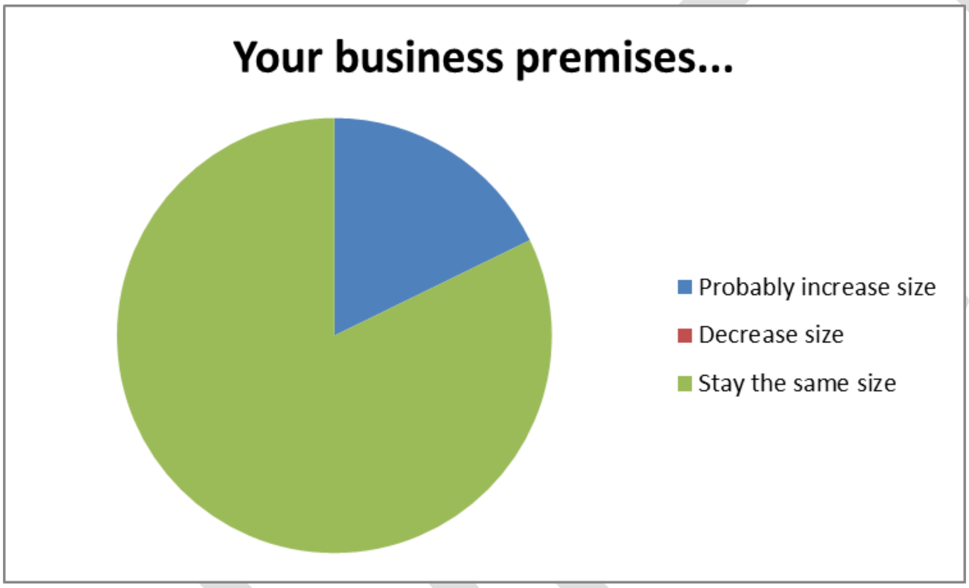
- I'm just beginning some major improvements to the pub.. could always do with more investment of course. Really needs better loos and disabled facilities.
- concentrating more on selling away from the workshop and to galleries, less time wasters and higher prices.
- DEVELOPEMENT RESTRICTIONS
- Mainly the public have cut back on holiday's abroad and want a reasonable cost for day;s out.
- Our business has grown because we have a vision, we've been able to invest in that vision, our staff have developed with us and helped deliver that vision and our customers tell us that they like it.
- People are staying in UK for their holidays.
- Presently under umbrella of a £200k development-project
- The business benefits from its location, I'm not sure there would be much benefit from re-location or large scale expansion
- we have also expanded into aylsham
- We have expanded our facities on our current site
- We now operate a sub office near Derby to support our Midlands operation with Head Office in Norwich

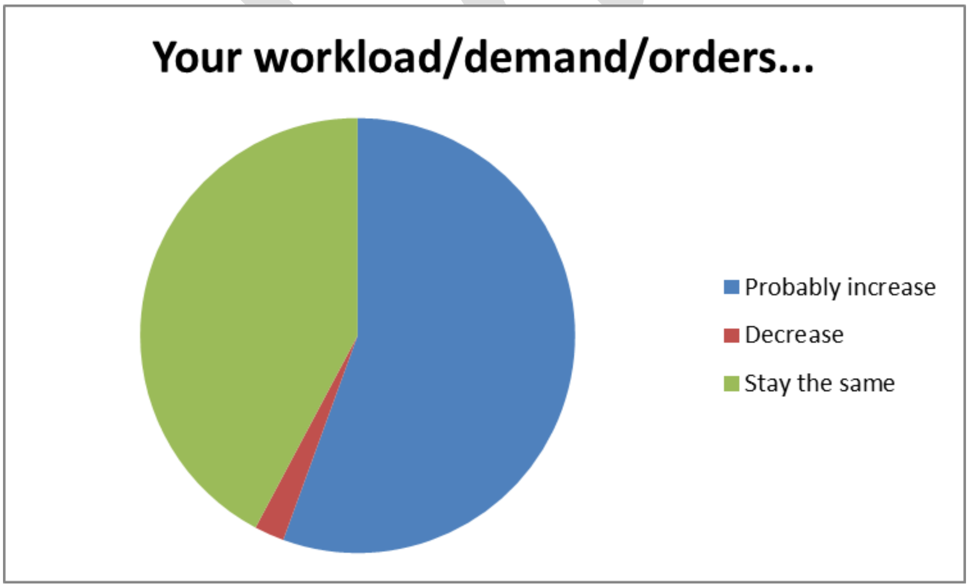
Generally, over the last five years:

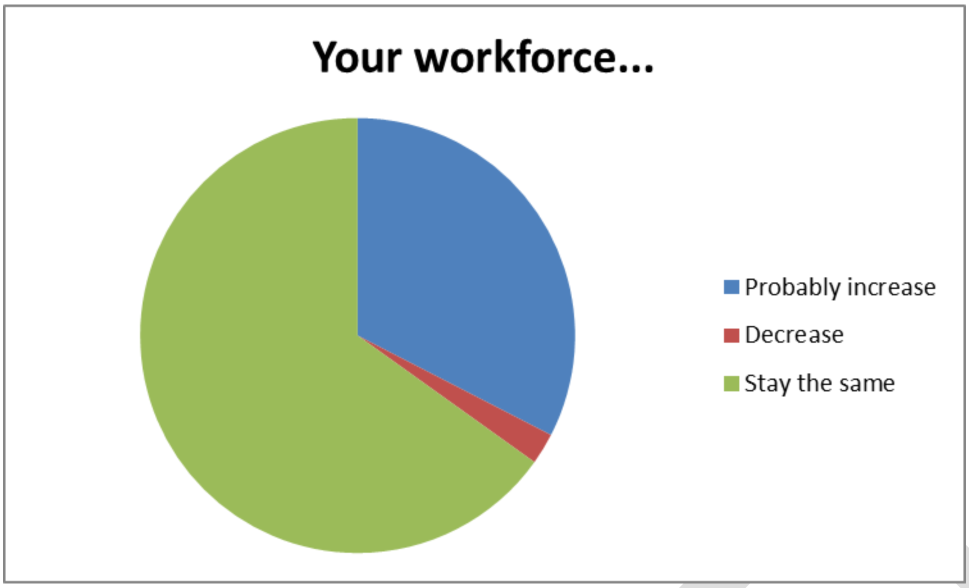
- *Turnover has stayed the same (with some experiencing increases);*
- *Permises has stayed the same (with some experiencing increases in size);*
- *Workload has mainly increased;*
- *Workforce has stayed the same with around 1/3 experiencing increases;*
- *Offer has mostly stayed the same at 2/3 with the other third changing; and*
- *The vast majority have stayed in the same location.*

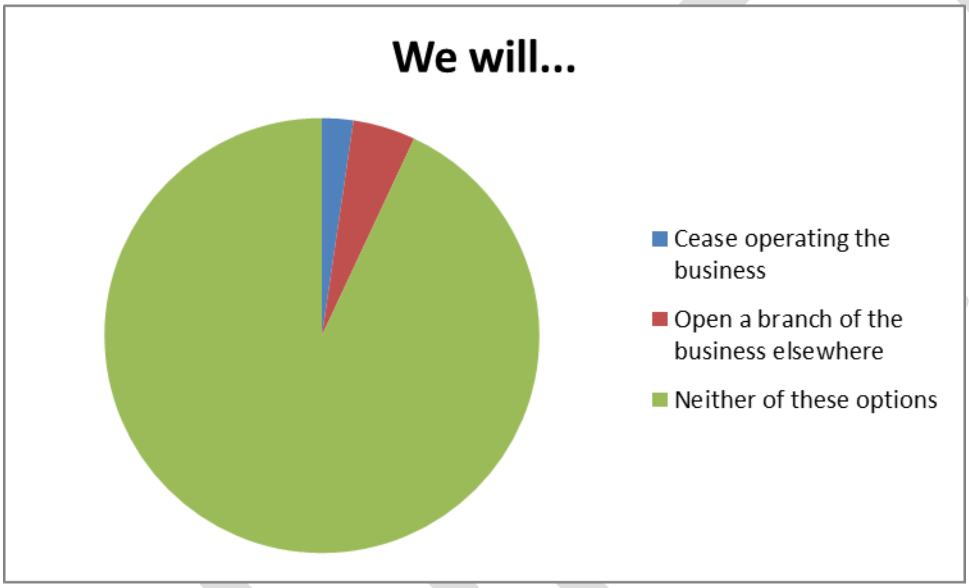
Looking to the next 5 years…


Your turnover...
Probably increase
Decrease
Stay the same

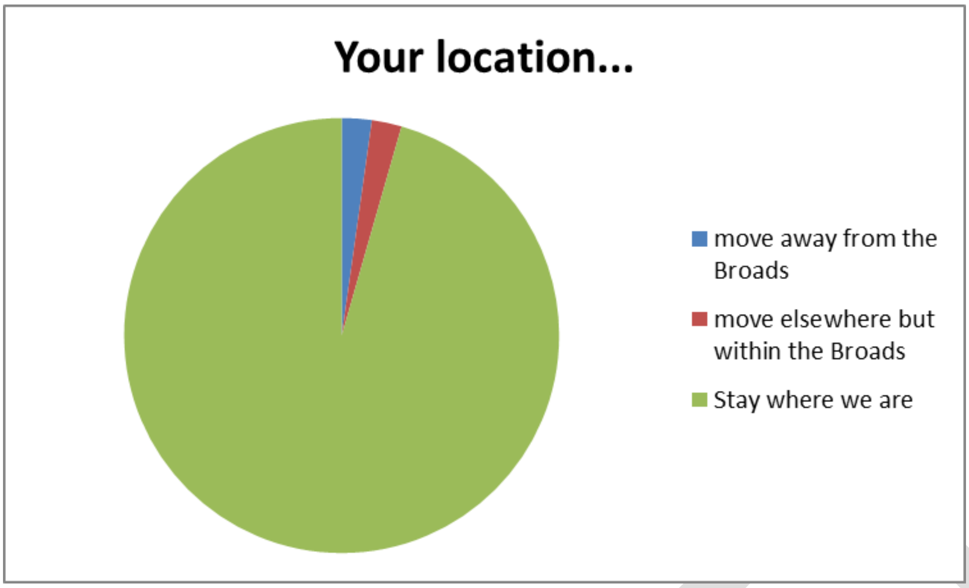

Your business premises...
Probably increase size
Decrease size
Stay the same size


Your workload/demand/orders...
Probably increase
Decrease
Stay the same


Your workforce...
Probably increase
Decrease
Stay the same


We will...
Cease operating the business
Open a branch of the business elsewhere
Neither of these options


Your business offer...
Change
Stay the same



- Because we will continue to focus on delivering high quality holidays and will maintain our policy of diversification and rapid response to customer demand, if we can.
- My wife is ill.
- I have no desire to increase the size of the business, I would be more than satisfied to maintain the status quo. Other than general maintenance/improvements the only change I may wish to make to the boat yard would be to move my residence to the business site for reasons of security, as per neighbouring yards.
- UNHELPFUL PLANNING AUTHORITY
- See previous comments, we will improve and increase what we offer here, rather than move and expand.
- There are possibilities opening which might result over 5-years to increased activity within the general Leisure sector
- We are in our sixties, but live on our business premises - we have no idea whether we will continue/retire & sell/retire but stay so cannot answer the last 2 questions.
- The global economy is improving and people are willing to spend money on luxury items. Although we would need to move premises, due to restrictions, we would have to remain on our current site.
- Improvements.. Hopefully letting rooms. Better facilities, better chefs, better food :)
- this is not really applicable as we are family working from home

Generally, over the coming five years:

- *Just over half say the turnover will increase;*
- *Permises will the same (with some experiencing increases in size);*
- *Just over half say the workload will increase;*
- *Workforce will stayed the same with around 1/3 experiencing increases;*
- *One business said they will cease operating, and a few more will open another branch but the vast majority will stay the same.*
- *Offer reflects the last five yeears with most staying the same and with the other third changing; and*
- *The vast majority intend to stay in the same location.*

Final comments

- I don't really think this survey applies to my furnished holiday letting business which consists of one property.
- I feel that in recent years the Broads Authority have become much more helpful and really understand the need to support local business growth in order for then to survive or stop them leaving for more urban areas
- Some questions not answered due to commercial sensitivity. All answers on this survey are to be treated as commercially sensitive and the business name should not be published linked to any of the responses
- I would like to see The Broads Authority being kinder & friendlier, more easily approachable & all lines of communication open towards small boatyard owners.
- The Broads really do need to have more facilities for our customers. It's OK to bring people here but if there isn't much for them to do on the water, if they struggle to find moorings, bins, showers, provisions etc. then they could leave unhappy and word of mouth can also hurt the area as much as help it. We are changing some of the things we do here and adding things to help our diminishing customer base by doing things like Airbnb to help our income stream on boats that are not out sailing. More things for people to do on the rivers in my opinion.
- Wish that the BA would stop attempting to change the name and invoking the Sandford Principle. The area will NOT become a national park and by calling it such, you are lying. Do the job you are paid to do, to look after the area. Keep the waterways dredged, moorings maintained and boaters happy.
- This questionnaire is hardly appropriate for a sailing club!
- I wish to let my holiday home throughout the year, currently just April to October, it's difficult to promote this to my guests by myself and as a tourist industry we need to work together to promote The Broads out of the main season.
- Very badly designed and written questionnaire.
- We also run a riverside holiday complex of 5 cottages. Answers are the same as for Bank Boats
- BA planning departments make tough rules then don't enforce them
- I'm investing everything. Could do with more customers. Encouraging sailing and other uses of the broad. Dredging of course. And a little flexibility on planning decisions for our improved facilities.
- Our comments are probably not relevant as you are looking for businesses who actually work in the Broads area rather than ourselves who just happen to live here and that's where we work.

Summary

- Around 500 or more businesses were contacted to ask to fill out the survey using emails, post or on-line contact forms.
- 64 organisations responded.
- A variety of business sectors filled out the survey, but the majority seem to relate to the outdoors and use of the water.
- The majority of the businesses that responded have operated in the Broads for over 25 years.
- The vast majority of the businesses that responded employ a few people only (less than ten).
- Businesses operate from a variety of premises. The most common premises of those who responded to this survey were boatyard, then office, then Industrial unit.
- Respondents seem to be content with the premises itself. The internet in the area is poor to average and so too is the road network although this depends on location and need.
- The main reasons for a business being located within the Broads reflect historical reasons as well as being linked to the Broads experience.
- A variety of reasons are given for choosing the actual premises ranging from liking the area and cost to acquiring the property and it being near to home.

- Needing more space reflects the particular circumstances of the business. Some responded saying they would like more space and others are content with the size of their property.
- Some responses indicated there were no advantages to operating within the Broads. Others rely on the Broads themselves and the tourists attracted to the area. General theme of the location being attractive.
- Planning rules, internet and mobile signals, the Broads Authority itself and many different organisations to deal with seem to be common issues.
- The ability to change the facilities was a common response and linked to this is the planning rules for the area. Better internet and support from organisations like the Broads Authority were also common suggestions.
- The category with the most responses was average but most were satisfied or very satisfied with operating their business in the Broads.
- Generally, over the last five years:
    - Turnover has stayed the same (with some experiencing increases);
    - Permises has stayed the same (with some experiencing increases in size);
    - Workload has mainly increased;
    - Workforce has stayed the same with around 1/3 experiencing increases;
    - Offer has mostly stayed the same at 2/3 with the other third changing; and
    - The vast majority have stayed in the same location.
- Generally, over the coming five years:
    - Just over half say the turnover will increase;
    - Permises will the same (with some experiencing increases in size);
    - Just over half say the workload will increase;
    - Workforce will stayed the same with around 1/3 experiencing increases;
    - One business said they will cease operating, and a few more will open another branch but the vast majority will stay the same.
    - Offer reflects the last five yeears with most staying the same and with the other third changing; and
    - The vast majority intend to stay in the same location.

Appendix F: Comments received as part of the Issues and Options consultation

South Norfolk Council

Issue 38: South Norfolk Council would support the retention of redundant boatyards or boatyard buildings for commercial/employment use before the consideration of alternative uses. The Council would support Option 2, a less restrictive approach, to have a hierarchy of acceptable uses with boat related employment as the preferred use. This acknowledges that boatyards are part of the unique culture of the Broads and should be retained where possible but recognising that a less restrictive policy may see such buildings brought back into life for other commercial uses more quickly.

Issue 39: How to address location of new employment land in the Local Plan: South Norfolk Council would support a combination of Option 2 and 3 aimed at directing employment uses to sustainable locations. It would be for the Broads Authority to assess whether any allocations for employment land are needed. Close working with constituent authorities would be needed to ensure they are no conflicts with potential allocations in neighbouring authorities.

Broadland District Council

Issue 38: what should the Authority's approach be for redundant boatyards or boatyard Buildings?

It is felt that the approach could involve a combination of the following options:

[Agree] Option 2: Less restrictive policy and allow other uses and,

[Agree] Option 3: Seek to retain sites in employment use. Taking full account of flood risk per NPPF guidance.

Issue 39: How to address location of new employment land in the Local Plan

[Agree] Option 3: allocate employment areas.

Another option could be to prepare a 'criteria based policy'. Location will depend on what type of employment and other constraints such as proximity and impact on nature conservations, flood risk etc. It is unclear whether there is an employment need, apart from the obvious demand for tourism related.

Environment Agency

27.2 Economic Issues & 27.3 Location of Economic Development:

Flood risk is a key issue for many development proposals in the Broads area. Where sites are considered in flood risk areas, the selection of sites must be based on the application of the Sequential Test. Suitability will be subject to the Exception Test (where applicable), and an appropriate Flood Risk Assessment.

Inland Waterways Association

What should the Authority's approach be for redundant boatyards or boatyard buildings? Option 3: Seek to retain sites in employment use. This should be modified to ensure moorings, slippage and parking facilities for visiting boats and canoes are retained. This will have the advantage that continued provision of services to boaters such as water, visitor moorings etc. will be maintained. These facilities are important to retain, otherwise gaps will appear along the water network. Any new development on the site must also be so designed to prevent a wind shadow or turbulence impairing the use of the adjacent navigation by traditional yachts and wherries. For certain marine uses, providing starter units might also work well in retaining some of the character and boat interest in a site.

How to address location of new employment land in the Local Plan: It is better to do encouragement through 'promote starter units' and other ways to provide what is needed, than try to guess where businesses want to go and make them go there. What does BA know about what conditions businesses need to go somewhere? What shortfalls are there currently?

Littlewood, Mr & Mrs P

The adjacent working boat yards are an important area for the continued survival for both Chedgrave and Loddon business, as these facilities bring in important trade and employment to the area. We therefore support Options 1 or 3 in Issue 38, Broads Economy Chapter 21.

Norfolk County Council

Response to Issue 38

It is felt that either no change to the existing policy or having a less restrictive policy would be the preferred options in relation to redundant boat yards or buildings from an economic development perspective.

Response to Issue 39

It is felt that reintroducing the approach from the 1997 Local Plan with development boundaries relating to employment development would be the preferred option from an economic development perspective.

Residential Boat Owners Association

Boatyard Industry: The RBOA supports the increase in the diversity and robustness of this sector, which would very effectively support the viability of adjoining communities. Appropriate residential moorings can support the viability of boatyards by maintaining regular income streams, regular need for boatyard facilities, maintenance, fuel etc and by providing affordable accommodation for boatyard operatives. Whilst understanding that some boatyard operations do not need to be carried out adjacent to the water, it is important to conserve this traditional connection.

River Thurne Tenants Association

It is becoming increasingly difficult for small boat yards to succeed and so do we leave the sites vacant? It would be better to encourage a wide diversity of uses and/or businesses rather than a derelict site which could then be vandalised and become an eyesore.

Evolution Town Planning

(Please note that the actual representation had much background in. This text relates to the Issues and Options consultation).

As stated above Somerleyton Marina Ltd are looking to achieve a future policy context that is flexible and positive towards the potential extension of the Somerleyton marina and boatyard supporting and responding to the demands of economic development and tourism.

As we have identified above; existing strategic objectives and Development Management policies DP16, DP19 and DP20 in particular currently provide a clear and positive framework but work is needed to bring them in line with more up to date national planning policy.

6.6 Despite recognising the importance of marinas and boatyards to economic prosperity the Issues and Options consultation document does not identify the need to provide policy guidance on the identification, recognition, development and expansion of existing sites. Issue 38 deals with redundant boatyards and is not relevant to the aspirations for Somerleyton Marina.

Issue 39 questions how the Broads Authority should address the location of new employment land and this is the closest to the matter we are concerned with:

Issue 39 Option 1:

Option 1 proposes to continue the approach in the Development Management DPD. As we set out above we would find this approach acceptable on the proviso that the new strategic policies were more positive and went further than they often do in 'maintaining' employment sites by 'encouraging' their expansion in circumstances where it is shown to be sustainable to do so. I.e. Somerleyton marina and boatyard. For example CS23 states "a network of waterside employment sites will be maintained throughout the system in employment use…". A simple but effective addition to this policy would be to say "a network of waterside employment sites will be identified, maintained and enhanced/promoted throughout the system in employment use…". Therefore at Somerleyton Marina the potential expansion of the marina and the boatyard could be encouraged rather than the status quo maintained. This approach would respond to "the increase in private boat ownership can offer an opportunity for the provision of other services, such as boatbuilding, repair and maintenance, in addition to maintaining demand for re-fuelling, pump-out and mooring facilities" discussed in the Issues and Options document. It would also reflect the sustainable location and the proximity to facilities and services in the village of Somerleyton nearby.

Issue 39 Option :

Option 2 proposes to reintroduce the approach taken to new employment sites reportedly taken in the 1997 Local Plan; which was to allow employment development in principle inside [residential] development boundaries and to resist it elsewhere unless it related to 'certain circumstances' such as 'boatyards' . Insofar as Somerleyton Marina are concerned the reintroduction of the approach taken in the 1997 Local Plan would only be acceptable if the earlier policy exception for 'certain circumstances relating to boatyards' was included. Otherwise, being outside of any development boundary and unlikely to feature in any future development boundary, sustainable expansion of the existing employment offer at the marina and boatyard could find itself contrary to Local Planning policy. The Broads Authority would also need to satisfy themselves that the approach taken in the 1997 Local Plan was compliant with current national planning policy imperatives.

Issue 39 Option 3:

Option 3 proposes to identify existing employment sites and to allocate land for this use. Somerleyton Marina could accept this way forward provided that, if a site specific approach were taken, a hierarchy of sites were developed that allowed smaller rural employment sites such as Somerleyton marina and boatyard to come forwards and be recognised for its sustainable characteristics. The criterion based approach discussed against Option 3 would be favourable to Somerleyton Marina if it contained updated policy criteria from DP16, DP19 and DP20. Any less than this and we could not support it. However recognising that such a policy would need to be applicable to many different types and sizes of sites this approach may be impractical. It is conceivable that a site specific policy, such as that for St Olaves in the adopted Site Specific Policies DPD, could be written for Somerleyton marina providing a bespoke framework for its expansion. It is acknowledged that a Call for Sites would need to be undertaken and contextual information and evidence would need to be provided to support this approach.

Our Preferred Option:

Given that existing Development Management policies are broadly acceptable in their current form as a means to judge the future potential expansion of the marina and boatyard at Somerleyton, and on the proviso of more positively worded strategic policies, we would prefer Option 1 as a means to guide and support our clients development aims. Option 3 would require a greater amount of input and therefore be less efficient than Option 1. Plus Option 3 includes a degree of uncertainty at this stage about whether and how generalised criteria intended for all employment sites could apply to Somerleyton marina. Equally if a site specific approach were taken, whether a size threshold might mean Somerleyton marina were excluded, despite is sustainability credentials. We would prefer Option 1 over Option 3. Option 2 could be acceptable but the risk to Somerleyton marina that the boatyard exception criteria were missed out or poorly worded is too great at this stage to lend this Option any support. We would prefer Option 3 over Option 2 and then Option 1 over Option 3. I.e. our preferred ranking of the options with the most preferable first is:

• Option 1 (preferred) maintain the approach in the Development Management DPD on the proviso that the strategic policies were more positively worded.
• Option 3 could be supported provided a bespoke site specific policy for Somerleyton marina and boatyard were adopted.
• Option 2 could only be supported if the boatyard exception were retained.

Appendix G: Comments received as part of the Preferred Options consultation

Broads Hire Boat Federation
Redundant Boatyards: Whilst we are anxious to see boatyard facilities retained as far as economically and practically possible for service and moorings provision, where this is not a realistic possibility it would be preferable to permit suitable development rather than allow the site to become derelict.

Evolution Town Planning (for Somerleyton Marina Ltd)
We look forward to discussing with the Broads Authority how the economy section of the Local Plan Review is taken forwards. As set out in our representations to the Issues and Options consultation the Somerleyton Estate are keen to secure a positive policy landscape in order to consider the potential for expanding the existing boatyard buildings in order to maintain and enhance the boat repair and service function. It will be important for the Broads Authority to recognise the unique range of facilities and services at Somerleyton Marina (moorings, hardstand, storage, boat lift, slipway, nearby pub, footpath access to railway station and a village with facilities in walking distance).

Knight, J (Broads Authority Navigation Committee Member)
Question 6: Planning needs to be able to react to changes in the economy and market demands. Positive planning which lists 'desirable' uses of land and buildings in the minds of planners rarely matches what is commercially viable and this can result in derelict buildings and delays in project delivery. The National Planning Policy Framework makes clear that there should be a presumption in favour of sustainable development and it is inappropriate, time consuming and ultimately fruitless for planning authorities to draw up lists of 'appropriate' uses for existing buildings for which there may be no demand. Proposals for change of use of existing buildings should be considered in the light of the wider policies for protecting and enhancing the Broads (which should themselves be compliant with the NPPF) rather than getting hung up on historic uses of buildings for which there is no longer a demand. The Broads economy is changing at an ever increasing pace, in common with the rest of the UK. Retailing has been - and will continue to be - greatly affected by changes in shopping habits driven by the availability of online options. Traditional boat building and other manufacturing will be affected by technological changes allowing rapid prototyping and more efficient build processes, which will inevitably result in the redundancy of some jobs and the creation of new ones with different skill requirements. Businesses may have to relocate, consolidate or close, and the planning process must be able to cope with these rapidly changing circumstances. Flexibility is therefore essential, meaning that policies should not be overly restrictive and must be capable of evolving over the life of the Local Plan. The tourism industry has also experienced significant and accelerating change over the past 2 decades and there is every reason to suppose that this will continue. Customers demand ever higher quality at a lower price, and are constantly looking for something different to their previous experiences. This presents huge challenges to businesses which must be able to adapt quickly in order to compete, and planning policies should facilitate necessary changes without delay. A delay of a few months can easily mean that a whole year is lost, due to the seasonal nature of UK tourism. More generally, the Authority should be proactive in encouraging developers to create employment opportunities and improved facilities both for visitors and the local community. Economic development should be at the heart of good planning, as a vibrant local economy provides the means of preserving the special characteristics of the Broads.

Norfolk County Council
It is felt that either no change to the existing policy or having a less restrictive policy would be the preferred options in relation to redundant boat yards or buildings from an economic development perspective. It is felt that reintroducing the approach from the 1997 Local Plan with development boundaries relating to employment development would be the preferred option from an economic development perspective.

South Norfolk Council
Question 6: South Norfolk Council would support the retention of redundant boatyards or boatyard buildings for commercial/employment use before the consideration of alternative uses with a hierarchy of acceptable uses with boat related employment as the preferred use. This acknowledges that boatyards are part of the unique culture of

the Broads and should be retained where possible but recognising that a less restrictive policy may see such buildings brought back into life for other commercial uses more quickly. South Norfolk Council would suggest that if any allocations for employment land are needed then these should be directed to sustainable locations, working with neighbouring authorities to ensure that no conflicts arise. South Norfolk would welcome the commissioning of work to better understand the economy and employment needs of the Broads and would be keen to work with the Broads Authority in developing any economic policy for the publication version of the plan to ensure that any cross boundary issues are addressed.