

























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

### Structure of Broads Marine Businesses

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

### Size of Company

- 5.2 The industry is diverse in terms of the scale of companies that operate within the sector but there are a large number of small and single employee companies and this is reflected in the 2001 census which records that 16% of the resident population of the Broads Authority executive area are self-employed.
- 5.3 Broads marine businesses are small – medium scale. The businesses responding to this key question (48 out of 49) accounted for the direct employment of 670 people. The 42 small businesses employ 39% and the 6 medium sized businesses employ 61%. The table below can be compared to the table for the national structure.

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

Source: BA survey 2008

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

<sup>3</sup> British Marine Federation – unpublished data on the Broads and surrounding area

## Business Sectors<sup>4</sup>

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

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

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

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

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

<sup>4</sup> Classifications of BA survey categories of activities

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

Distribution: Marine equipment supply, Wholesale marine equipment.

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

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

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















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

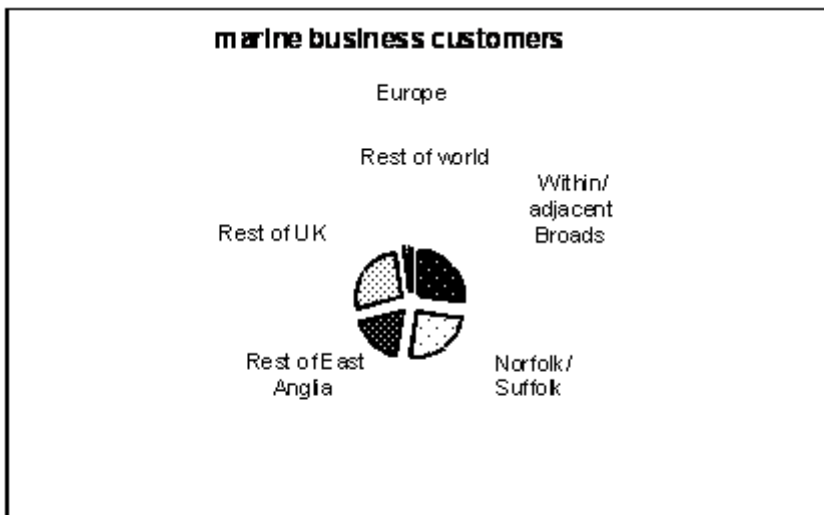
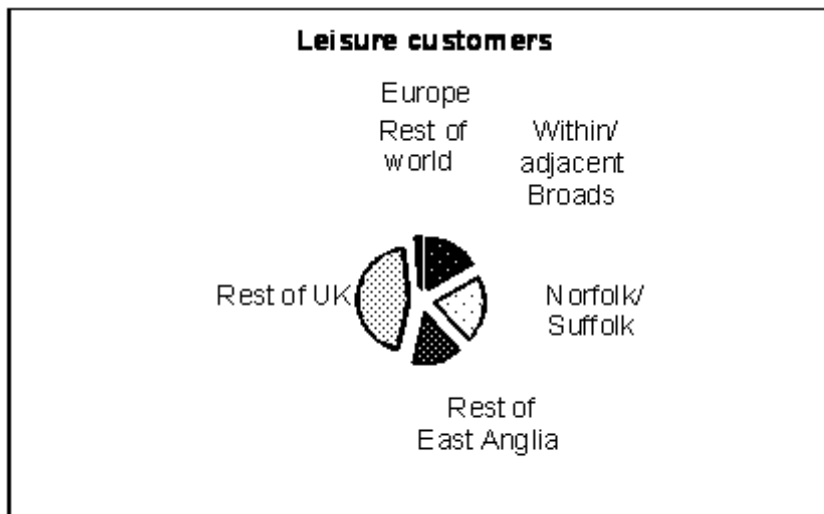
<b>code</b>	
Bank	A
Accountant	B
Solicitor	C
Insurance agent	D
Computing	E

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

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

## Customers

- 5.23 Businesses were asked to give an indication of where their customers come from. They were not required to carry out an in-depth analysis of their books. There were 46 responses to this question. This gives a geographical sphere of influence. It is not an economic evaluation.
- 5.24 In contrast to the businesses own sourcing of goods and services which tended to be local to the Broads, the customers of Broads goods and services come from further away. "Leisure" customers, whilst well represented in the local market are strongly represented in the UK beyond East Anglia. Customers of the marine manufacturing/repair side of the businesses are more focused within East Anglia and also have a customer base in the rest of the UK. A small proportion of customers come from beyond the UK



## Summary

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

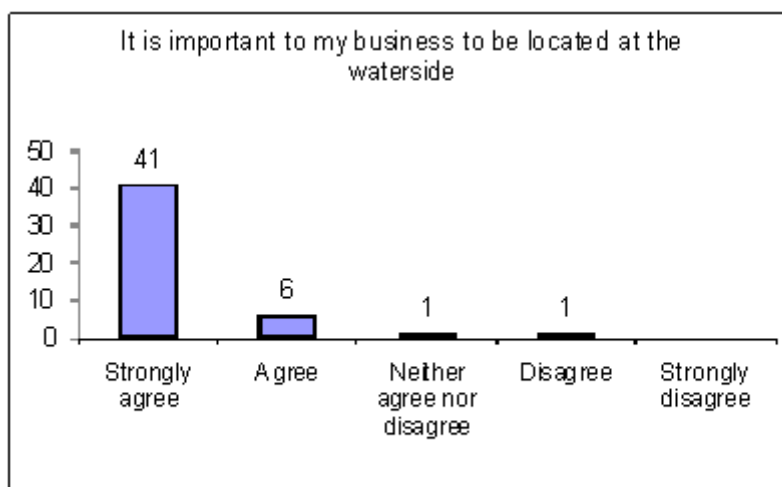
## 6 Future of the marine businesses

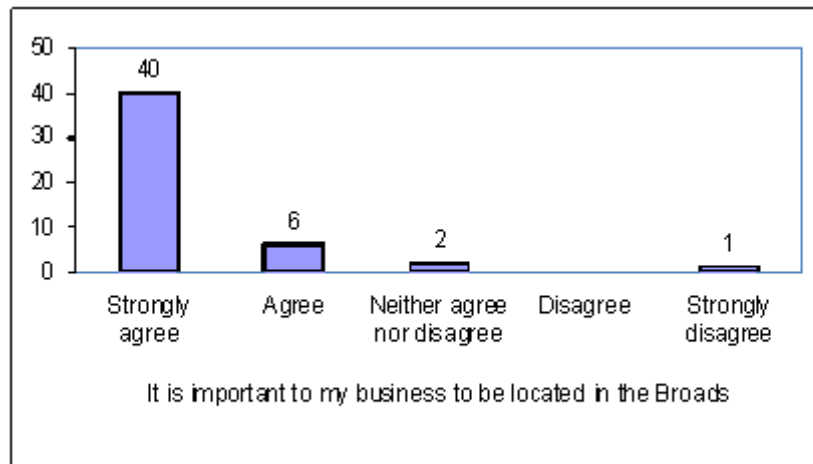
### Location

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

### Aspirations

- 6.2 Eighteen boatyards expressed some future aspirations for their site. These included expansion of moorings/marina (3), more holiday accommodation (4), general rebuilding/modernising, being able to respond to changing demands in boat building, expansion of the boat building/repair facilities (9). One would invest in their hire fleet and another was more negative about that side of the business. One respondent thought their site had no future due to oversupply of boatyards and a lack of customer demand.
- 6.3 The case studies allowed greater insight to the way sites are developed. There is a distinct contrast between the northern and the southern sites. The northern site benefits from its urban location with a mix of facilities and services within a short distance. It maintains a viable hire fleet. The southern site is isolated and suffers from a general reduction of visiting hire and private craft and so has had to become more self-sufficient in its offer. The concentration of small businesses, mostly single purpose, with its small hire fleets replaced by private moorings could be viewed as a “co-operative” in that a wide variety of marine and retail services are available albeit provided by a multitude of small businesses. All case studies illustrate the need to respond to the changing leisure market and to invest in their physical structures on the land, whether for boat repairs maintenance or to offer a higher quality leisure experience (accommodation, services, retail). The importance of the economic chain is illustrated and, indeed, what happens when it is broken.
- 6.4 The case studies illustrate the North/South divide in the structure of marine businesses. In the north, complementary businesses support each other and there is a critical mass. The southern business has become isolated with the general decline and now finds it has to have a mix of supporting services and facilities on site. It is a vital link in the chain of facilities through the waterways as it has no near competitors and boaters do not have such a wide choice of suppliers. The network of boatyards has safety implications for boaters apart from the business opportunities.





- The companies rely on their waterside location in order to carry out their diversified businesses.
- Single focused businesses are able to relocate away from the waterfront and become suppliers to the rest of the industry eg window manufacturers, (non-Broads) boat builders.
- Where there is an internal market between boat owners and the manufacturing/supply sector there is greater optimism.
- The loss of operational boat yards in the southern Broads, not even able to supply private moorings, means that remaining operators are more reliant on land based business and this in turn reduces the market for marine services.
- Customers demand higher quality facilities, businesses need to reinvest to retain custom.
- The “value added”/indirect economic benefit of the marine industry is higher where a site can provide a variety of services on site or in close proximity.
- Larger companies on larger sites have been more responsive to the decline in the hire boat fleet than small operators and have been able to maintain direct and indirect economic benefits.
- Small operators have consolidated their business activities to provide space for moorings.



## 7 Conclusions

- 7.1 The Broads is a wetland already characterised by fluctuating water levels due to tidal, fluvial and geological influences. In addition, the Broads is designated a protected landscape and a network of navigable waterways. It is within this context that the leisure marine industry has flourished and maintains an important economic and social presence today.
- 7.2 The majority of the executive boundary is functional floodplain. Flood risk management must become integral to and explicit in the operational management of waterside sites. Businesses must therefore consider how the nature of the waterside landscape and character of rivers will change over time.
- 7.3 There has been a decline/potential stabilisation of number of hire boats and an increased private boat ownership. This has maintained a customer base, in fact one that serves local residents for recreational boating rather than long stay visitors from outside the region as in the past. The recreational opportunities will be attractive to future residents of greater Norwich and this should eventually be a potential growth business.
- 7.4 Businesses are multifunctional. This allows them to spread risks and redeploy resources according to seasonal activities. Diversified businesses require waterside locations and are Broads-specific. The larger sites can respond more easily to new market opportunities and can accommodate a range of activities on their sites. The subdivision of boatyards and selling away from marine uses has undermined the ability of smaller businesses to survive market changes.
- 7.5 Employees live very locally. Businesses rely on this pool of specialist skills. Policies should therefore ensure an adequate housing supply and the ability for businesses to reinvest or relocate to provide suitable accommodation within the local area. This is particularly true of the Manufacturing/boat repair sector.
- 7.6 Broads businesses are small, locally owned and managed, with a high proportion of income generated retained in the local area. There is a strong local/internal market in professional services and components trading with each other. However, the benefits of the marine industry are felt unevenly across the Broads. Towns and villages in the south are losing out because of the loss of boatyards to residential redevelopment. Future opportunities may arise with the redevelopment of Lowestoft and a move from commercial to leisure marine.
- 7.7 The manufacturing base of the industry is large and its export performance is strong. Together with the tourism elements eg the hire boat fleet, these sectors bring money into the area from outside.
- 7.7 The relationship between number of private moorings/boat movements/ecological impacts/economic activity in visitor and marine business has yet to be understood. It is recommended that a study of private boats be undertaken to ascertain their pattern of use. To what extent does increasing capacity of private moorings have positive effect? How beneficial is it for provision of private moorings to be increased with little/no control (size, location)?
- 7.8 Moorings themselves require limited investment when on the navigation but basins require dredging. Both require maintenance of quay heading, and generally water and power supplies and car parking as a minimum. There is limited ongoing management and they have limited direct business impacts. The added value is low in comparison with the use of those moorings for fully utilised hire boats. As there is currently a small and consolidated hire fleet, income must be generated through alternative sources.
- 7.9 However, the study concludes that it is preferable to allow private moorings on a site than for it to be redeveloped away from marine related uses to safeguard its future return.

- 7.10 A decline in the industry brought about by planning restrictions would have serious implications for the villages close to the Broads. The Broads marine industry contributes to the regional economy and should receive greater recognition for its role in providing a positive image to the East of England. This study has not even assessed the intrinsically related tourism business sector which would greatly increase significance locally and regionally.
- 7.11 The Authority and Broads Hire Boat federation are grateful to the many businesses who took the time and trouble to contribute to this study. The BMF data and Broads specific analysis has added to knowledge of the economic impact of the industry. The grant received from LEADER+ programme has enabled the study to be completed and published. The Authority and neighbouring district councils now have a much greater understanding of the economic and social impact of the industry and why boatyards should be protected.

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## **Case Study 1 – Waveney River Centre – Burgh St Peter**

### **Background**

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

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

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

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

### **Development**

The development at the Site has included:

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

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

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

### **Benefits of development**

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

- Year Round:
  - 4 full time boat builders;
  - 2 full time site workers;
  - 2 full time admin staff,
  - 1 part time housekeeper;
  - 1 part time cleaner; and
  - 1 part time office assistant.
  
- Seasonal
  - 1 full time leisure centre supervisor;
  - 3 additional part time cleaners;
  - 2 part time shop and leisure centre assistants; and
  - 2 holiday job (teenagers).

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

### **Flood Risk**

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

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

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

### **Conclusions**

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



Aerial View of Waveney River Centre (from website)

## **Case Study 2 – Barnes Brinkcraft, Hoveton**

### **Background**

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

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

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

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

### **Development**

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

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

### **Benefits of Development**

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

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

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

### **Flood Risk**

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

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

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

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

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

## **Conclusions**

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

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

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



Barnes Brinkcraft – moorings, offices and 'The Sail Loft'

## **Case Study 3 – Brundall Riverside**

### **Background**

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

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

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

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

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

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

### **Development proposals**

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

### **Benefits of the development**

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

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

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

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

## **Flood Risk**

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

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

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

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

## **Planning Issues**

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

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

For this case study the exception test is passed as:

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

## **Flood Resistance, resilience and safety**

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

### **Property**

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



## People

A flood plan should be produced to:

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

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

## Conclusions

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

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



Aerial view of Brooms boatyard (from website)

## Survey of Marine Businesses in the Broads

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

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

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

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

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

**Please return this survey before 3 March 2008**

Many thanks for your time

*Gillian*

Gillian Morgan

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*If you would like further information on planning, extensive information on Planning policy and making planning applications is available on our website: [www.broads-authority.gov.uk](http://www.broads-authority.gov.uk)*

## Survey of Marine Businesses in the Broads

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

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

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

Name of your Company	
Full Postcode	

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

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

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

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

	<b>code</b>
Bank	A
Accountant	B
Solicitor	C
Insurance agent	D
Computing	E
Printers	F

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

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

*Please insert letter code(s) against all relevant places*

*eg if you accountant comes from Acle*

Acle	B
------	---

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

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

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

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

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

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

**Firstly, Moorings, chalets, boat hirers**

Table 1

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

**Secondly, the rest of the business**

Table 2

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

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

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

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

.....

.....

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