

Brief for a study into the tourism sector of the North Norfolk Economy

Introduction

As part of the formulation of the Core Strategy and Site Specific policies for the North Norfolk Local Development Framework (LDF) the District Council needs to gather evidence and develop a deeper understanding about issues impacting on the tourism sector of the district's economy.

We are therefore seeking to appoint consultants to produce a study of the tourism sector of the district's economy, including an analysis of the district's continued strong appeal as a visitor destination and how this position can be maintained in the future; an analysis of recent trends in employment and business activity within the sector and a review of Government policy statements with respect to the development of tourism and cultural attractions and thereafter make recommendations to the Council as to the policy interventions which could be incorporated within the new LDF being prepared for the district. Such policies should seek to support and encourage the continued competitive performance of the tourism sector of the North Norfolk economy.

In addition to undertaking primary research into those issues impacting upon tourism businesses in North Norfolk over the past decade and undertaking a review of Government Guidance in respect of such matters, the study should also evaluate the effectiveness of existing Local Plan policies to establish whether they have been successful in their objective of seeking to support continued investment in the diversity and quality of tourism infrastructure in the district in terms of the accommodation, attractions, natural and built environment and resort infrastructure and propose how these policies should be adapted / revised in the context of preparing a new LDF for the district covering the period to 2021.

Background

The North Norfolk District covers an area of 960 sq km of attractive rural countryside with a coastline of almost 75 kilometres. The District has a strong and diverse tourism offer and over the past decade considerable success has been achieved in extending the tourism season beyond the traditional "summer" seaside holiday attractive to young families and the older generation. Whilst such markets are still important to the District – the district has increasingly developed a reputation as a "quality" short break destination – based upon its relative accessibility from key markets in London and the Home Counties and the East Midlands; its high quality natural environment; quality of tourism accommodation and the attraction of its independent and specialist retail offer.

Research on the Economic Impact of Tourism to North Norfolk in 2003 undertaken by the East of England Tourist Board on behalf of the District Council identified the following:

Total direct tourism spend - £357.1 million
Total number of visitor nights in district – 3.91 million
Total staying visitor spend - £133.6 million
Total number of day visitors – 8.5 million
Total day visitor spend - £223.5 million

Significantly because of the high number of second homes in the district and the attraction of the area to visits by Friends and Family staying with local people; there is further significant spend from these two sources within the district - valued at £1.9 million and £11.7 million respectively in 2003.

The report estimates that up to 7,100 FTE (or just under 10,000 actual) jobs in the district are supported by the tourism sector. This accounts for approximately 25% of total employment within the district.

Probably needs a little more in terms of nature of offer, investment in regeneration, decline of Broads, award winning businesses, Blue Flag beaches etc.

Objective

The District Council therefore needs to develop a deeper understanding of such issues in the formulation of policies for inclusion within the Local Development Framework to be prepared for the district and to this end wants the appointed consultants to prepare a report which considers such matters and makes some comparative assessment of the experience of other remote rural districts with respect to similar issues. The study needs to look at the impact of changing visitor and investment trends **from a land-use, development and planning policy perspective**. The Council is **not** seeking from this study commentary on the position of / opportunities for the district in terms of market segmentation, place marketing or branding of the district's tourism product.

Scope and Methodology

It is suggested that the study takes the following form:-

1. Context statement

To cover the following issues:

To understand the changing nature of tourism businesses and activity in North Norfolk over the period since 1990 relative to national and international trends; to include:-

- - the relative decline of the traditional bed and breakfast sector
 - the significant investment made in “quality” serviced accommodation both in the bed and breakfast and small hotel sectors
 - the continued absence of investment by any of the national and / or budget hotel chains in the district; except the YHA which has invested in a new hostel at Wells next the Sea (opened in 2002) and has also upgraded its Sheringham facility
 - the significant growth of the quality self-catering market in the district
 - the decline of the “chalet” park product and the potential land-use implications of this particularly in the east of the district – ie Cromer, Mundesley, Bacton and Walcott; but also inland at North Walsham and at Potter Heigham on the Broads
 - changing trends within the holiday park market – suggested shift away from touring to static pitches on holiday park developments often linked to investment in on-site leisure facilities
 - continued investment in facilities at some touring caravan and camping sites and demand for new sites
 - decline of the traditional Broads boating holiday
- Commentary on the changing nature of the visitor attraction offer in the district – perceived change away from “attractions” to wider appreciation of the natural environment – birdwatching, walking, cycling; the historic built environment – both seaside resorts and market towns and historic houses and parks; and specialist shopping / quality eating
- Commentary on the strength of the district’s attraction as a “day visitor” destination – in the short, medium and longer terms
- Commentary on the growth / changes in tourism employment – numbers, skills, age of workforce etc over the period since 1990; reliance on seasonal or migrant labour
- Commentary on levels of profitability of tourism businesses and the drivers for change – eg evidence of increasing turnover of tourism businesses with a number of locally significant businesses currently up for sale and an increasing number of proposals for converting hotels and guest-houses to private residential properties

- Anticipating the future in terms of increased leisure time, increasing consumer expectations and the extent to which these may provide opportunities for North Norfolk tourism businesses.
- Assess the value of the School Group / Youth Market to the district and comment on the future performance of this sector.
- Potential to grow the overseas visitor market in the district with the proposed development of Eastport at Great Yarmouth and the longer distance “domestic” short-break market through the introduction of budget air routes through Norwich International.
- Anything else?

2. Review of current Local Plan policies as they relate to the tourism sector

The study should review existing Local Plan policies as they relate to the tourism sector and consider the extent to which they can be seen to have achieved their original objectives. Some assessment should also be made to the extent to which existing policies might need revision in order to assist the District Council and its partners through the North Norfolk Community Partnership address community aspirations in the future.

Policies to be reviewed would include:-

those within Chapter 13: Tourism of the adopted Local Plan – ie:

Policy 120: Heritage Attractions;
 Policy 121: Large-Scale Leisure Proposals;
 Policy 122: Hotels;
 Policy 123: Static Caravan Sites;
 Policy 124: Cliff-Top Caravan Sites between Sheringham and Overstrand;
 Policy 125: Touring Caravan Sites;
 Policy 126: Permanent Holiday Accommodation;
 Policy 127: Holiday and Seasonal Occupancy Conditions;
 Policy 128: Loss of Unserviced Holiday Accommodation;

together with:

Policy 5(m): The Countryside (recreation and tourism);
 Policy 20: Norfolk Coast Area of Outstanding Natural Beauty;
 Policy 24: The Broads and its Setting;
 Policy 25: Historic Parks and Gardens;
 Policy 26: Undeveloped Coast;

Policy 29: The re-use and adaptation of buildings in the Countryside;
Policy 83: Amusement Centres;
Policy 109: Golf Courses;
Policy 110: Golf-Course-related Developments;
Policy 112: Access to the Countryside;
Policy 118: Motorised Water Sports

- specifically whether these policies support or constrain the competitive performance of tourism enterprises.

With particular reference to Policy 29 some analysis needs to be undertaken regarding the extent to which the local supply of self-catering holiday accommodation available for let might have reached saturation point resulting in diminishing returns for businesses given the level of investment made. The District Council would wish to develop some understanding of the policy implications which might arise through such a situation if businesses cease trading and attempts were made to remove the holiday occupancy restrictions thereby resulting in an increase in the number of permanent dwellings in the countryside.

3. Review of national planning policy guidance

The study should make appropriate references and linkages to PPS7 – Sustainable Development in Rural Areas and the Rural White Paper and any other relevant recent reports / policy papers issued by organisations such as the DCMS, VisitBritain; VisitEngland, the East of England Tourist Board, CLA, CBI, Countryside Agency, CPRE.

4. Comparative assessment of the experience of other remote rural districts with respect to similar issues

The report should make some assessment of the experience of other remote rural districts with respect to the development of policies which support the tourism sector. Particular reference should be made to those authorities which have obtained “Beacon” status in their support for the Rural Economy.

Output

Delivery of a report addressing each of the four issues detailed above; together with a series of recommendations which can be considered by the Council in the context of developing policies for inclusion within the new LDF being prepared for the district.

Timescale

*It is anticipated that the appointment of consultants to undertake this task will be made during the week commencing **tbc** 2005; with the final report to be presented to the Council by **tbc 2005**. It would be expected that the consultants would be asked to give a presentation of their report to the Council's Local Development Framework Working Party at a date to be agreed in late May / early June.*