NORTH NORFOLK DISTRICT COUNCIL

TOURISM SECTOR STUDY

OVERVIEW & RECOMMENDATIONS

Final Report

November 2005

Prepared by ______________________

Checked by ______________________

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Contents

1 Introduction

1.1 The following report is designed to provide an overview of the tourism sector within North Norfolk to allow for more effective decision-making and policy formulation, and to aid the continued management of a sustainable tourism industry within the District.

1.2 Following a comprehensive framework of research and consultation into the tourism sector within the District a series of reports have been produced that provide:

- an appraisal of the key assets and appeal of North Norfolk as a tourism destination, and place this within a wider context of Norfolk as a whole;
- a comprehensive audit of the current tourism plant and infrastructure within the District, including visitor attractions, visitor accommodation, and additional amenities, services and facilities used by visitors during their stay;
- a review of the worth of tourism to the District in terms of volume, value and the number and types of jobs supported, and placed within the context of Norfolk, the East of England Region and the UK as a whole;
- an assessment of the current market against the key assets and attractions, and identified future market trends that could have impacts on the land-use of the District;
- a review of planning policy relating to tourism and its effectiveness in promoting or restraining certain types of tourism development based on detailed analysis of a comprehensive sample of planning applications and decisions; and finally
- a summary of the requirements of effective tourism management and rural economic development using examples of districts that have achieved Beacon Status.

1.3 The complete reports can be found in the annex to this report.

1.4 The purpose of this report is to provide a more concise overview of North Norfolk’s tourism sector based on the main findings of the background reports; to identify the key issues that will effect the prospects of tourism in the future; highlight the key development and policy issues that needs to be addressed; and to offer a series of conclusions and recommendations that can feed into the Local Development Framework in relation to tourism.

2 The Importance of Tourism to North Norfolk

2.1 The prosperity and welfare of North Norfolk and its community is irrevocably linked to the success of its tourism sector.

2.2 Tourist expenditure, recorded as an export measure, contributes an estimated £357.1million to the economy, underpinning 7,069 FTE jobs. 84% of these jobs are provided directly as a result of visitor spend activity, with the remainder being supported indirectly through tourism business linkages, and through the resultant expenditure of employees on local goods and services.

2.3 Moreover, the crosscutting nature of tourism means that these effects are felt on a whole range of employment and economic activities over and above the 'front-facing' accommodation and attraction enterprises normally associated with the hospitality industry, namely:

- the arts and crafts, with the visitors actually promoting this sector as they look for unique and locally produced goods or experiences, or whereby specific traditional skills are employed for the preservation and conversation of important heritage sites that are supported by visitor spend and entrance fees;

- leisure, through the pursuit of activities that have a participation fee such as golf, sailing, tennis, swimming, and other such sports;

- retail, through the purchase of clothes, gifts, specialist products such as antiques and arts and crafts, more general consumables, and food and drink for consumption off-site. Tourism can particularly sustain and improve the viability of markets and local shops that could otherwise struggle if reliant on the local population alone;

- catering, particularly pubs and restaurants in more vulnerable locations such as small villages in rural surroundings that have limited local markets;

- transport, with both day visitors and overnight visitors who use local transport helping to support routes that are a valuable resource for local residents that otherwise may have no other means of travel;

- agriculture, through the sale of produce to local businesses, and increasingly through helping farmers diversify their income through accommodation provision or opening up as attractions/activities;

- construction, through both maintenance works and new build developments that specifically cater for the visitor market;

- Real Estate, through land and property purchase specifically for tourism enterprises, and through second home ownership.

2.4 It is therefore essential that tourism continues its contribution to the local economy of North Norfolk within an increasingly competitive market, and in the face of more sophisticated developments that are ever expanding the choices available to visitors.

2.5 The Local Development Framework provides a new vehicle within which the District Council can express its ambitions and aspirations for tourism. Ideally, the Framework should seek to:

- detail the primary assets and introduce measures that seek their preservation, protection and enhancement;

- recognise opportunities for new investment that should be explored;

- actively involve stakeholders and partners in consultations over the future strategy for tourism, in line with the Council's statement of Community Involvement;

- suggest where improvements to the infrastructure, amenities, facilities and services can be made to enhance the visitor experience;

- introduce or revise current planning policy in order to assist the District Council, key stakeholders and partners involved in the tourism sector drive and deliver a tourism product that is based on the principles of sustainability, balancing the needs of the visitors, the economy, the community and the environment; and

- determine the involvement and role of the Council in developing a sustainable tourism product through a vision which can be adopted by the numerous internal and external stakeholders in tourism.

3 Overview of the North Norfolk Tourism Sector

3.1 A fundamental requirement for the future planning of tourism is to have concise portrait of the current position of North Norfolk's tourism sector.

3.2 A series of background reports have been conducted that provide the contextual position of the North Norfolk's Tourism Sector. The main findings from these background reports are summarised below.

Assets & Appeal

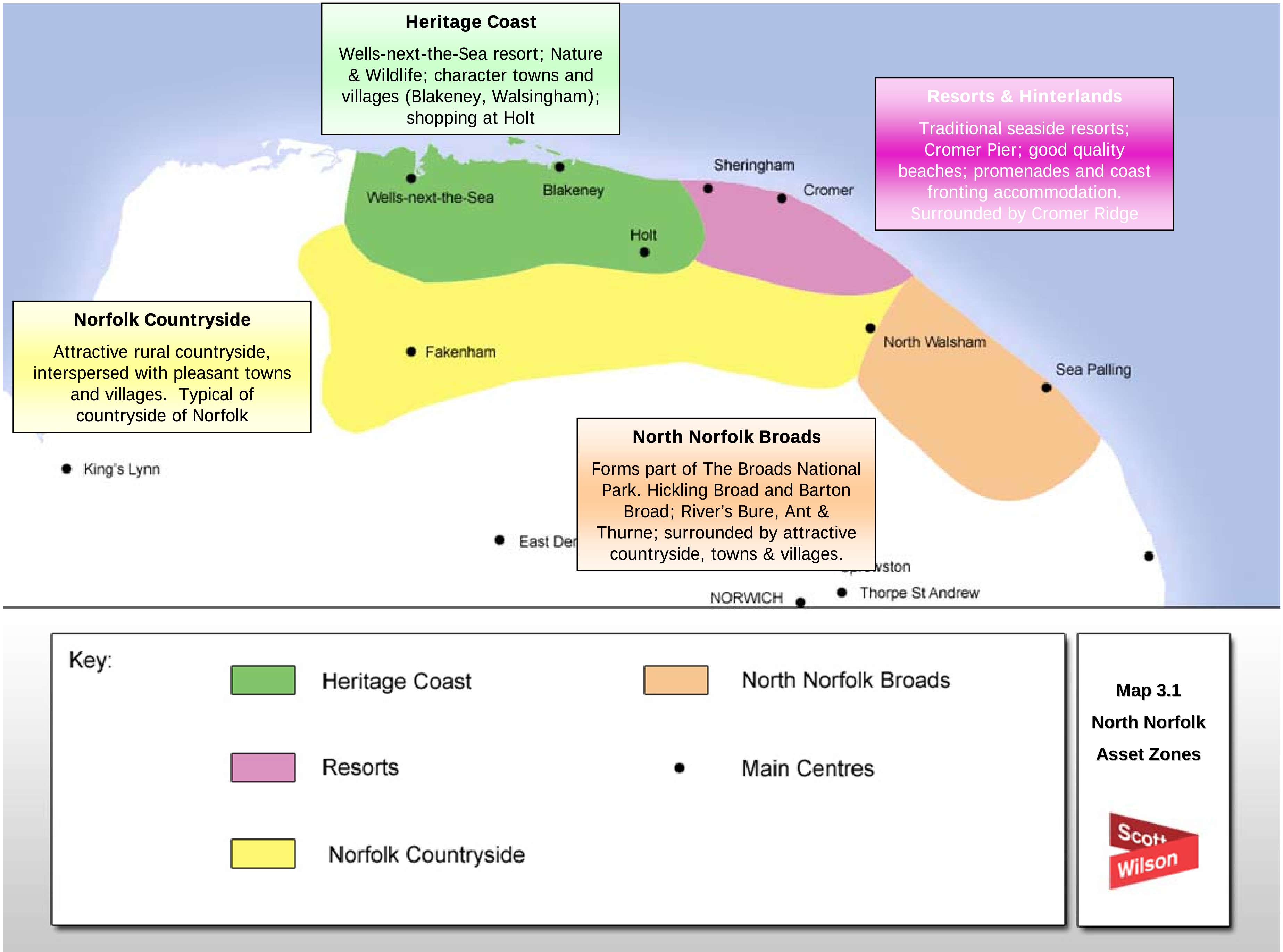
3.3 North Norfolk is one of the most distinctive and diverse tourism District's within the East of England region, with the main appeal being in regards to the District's unique environmental assets. Traditionally these assets have been defined as:

- its coastline and beaches;
- the Broads; and
- its rural countryside.

3.4 The future aspiration of tourism within the District needs to be rooted in the principle of enhancing the quality and character of these assets. However, the study revealed that there is considerable variety in the form and presentation of the countryside and coast across the District. Consequently, a visitor's view of the District will differ from one area to another in relation to their preference of destination, their motivation to visit, their expectations and their experiences; for example, visitors who choose to stay in Blakeney will have different expectations of the environment, activities, characteristics and ambience compared to visitors who stay in Cromer and Sheringham, or similarly North Walsham and Stalham. Therefore, to simply view the assets as described above is considered insufficient.

3.5 In order to provide a more reflective and considered approach to defining the core characteristics and appeal of the North Norfolk tourism assets, it is recommended that a zoning approach be adopted.

3.6 The purpose of the zoning approach is to help define the primary assets from a tourism perspective, which in turn emphasises the key motivations behind a visit, and yet are still reflective of the qualities and characteristics of the local economy, community and environment. Therefore, the benefit of adopting the zoning approach is that it allows development, land-use and planning policy recommendations to be more responsive to the specific issues and requirements of particular areas.


Heritage Coast
Wells-next-the-Sea resort; Nature & Wildlife; character towns and villages (Blakeney, Walsingham); shopping at Holt
Resorts & Hinterlands
Traditional seaside resorts; Cromer Pier; good quality beaches; promenades and coast fronting accommodation. Surrounded by Cromer Ridge
Norfolk Countryside
Attractive rural countryside, interspersed with pleasant towns and villages. Typical of countryside of Norfolk
North Norfolk Broads
Forms part of The Broads National Park. Hickling Broad and Barton Broad; River's Bure, Ant & Thurne; surrounded by attractive countryside, towns & villages.
Wells-next-the-Sea
Blakeney
Holt
Sheringham
Cromer
Fakenham
North Walsham
Sea Palling
King's Lynn
NORWICH
Thorpe St Andrew
Key:
Heritage Coast
Resorts
Norfolk Countryside
North Norfolk Broads
Main Centres
Map 3.1
North Norfolk
Asset Zones
Scott Wilson

3.7 With each of these values in mind, the key asset zones of North Norfolk can be defined as follows (see Map 3.1):

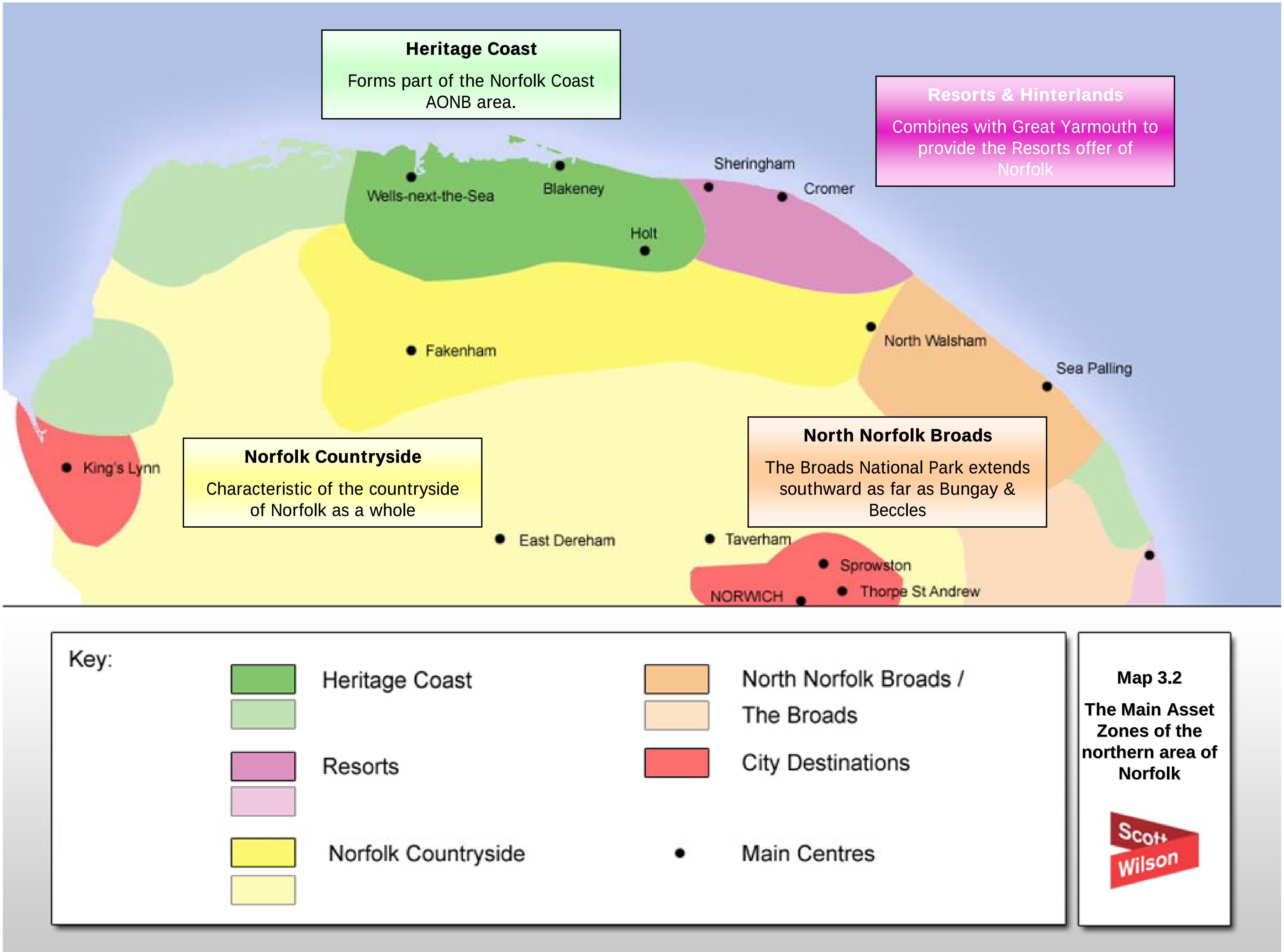
- **Resorts & Hinterlands**, which represents the hallmark of North Norfolk's tourism offer through the traditional seaside resorts of Cromer, Sheringham and Mundesley. This zone is a key strength of the current tourism offer for the District, and is the primary reason behind the District's long-standing success in attracting visitors. However, the zones high gearing towards tourism in terms of accommodation (48% of serviced, 59% of static, and 58% of touring pitches) means that there is a potential threat to the local prosperity of many businesses (not just accommodation operators) should a downturn in tourism volume and value be experienced.

- **North Norfolk Broads**, which forms part of The Broads National Park and is thus influenced more by the prosperity of The Broads as a visitor destination than other assets of North Norfolk. The Broads has experienced the greatest decline in terms of tourism prosperity in recent times, particularly amongst the boating rental market. The Broads Authority is seeking to increase the volume and diversify the product of the National Park, particularly in opening up the area to the activity market, and in improving the quality of the offer available. Continued association with The Broads could help to raise the profile of the eastern area of North Norfolk as part of this visitor destination.

- **Heritage Coast**, whose strength and weakness as a tourism resource is based on its AONB status, natural environment, and quaint countryside and coastal villages of individual character and charm. The zone already has the second highest concentration of accommodation enterprises within North Norfolk, and some of the more popular attractions in The Muckleburgh Collection, Holkham Hall and Estate, and the Shrine of Lady Walsingham; and the nature reserves of Blakeney Point, Cley and Salthouse. Any increase in the development of tourism in this zone could represent a threat to the preservation and conservation to the environmental that is recognised as being of national, and in some instances (the salt marshes) international importance.

- **Norfolk Countryside**, which represents the inland areas of North Norfolk. The current lack of tourism attractions and accommodation reflect the fact that it is very much a by-passed zone as tourists travel to the other destination zones. However, with the restrictions on development within the other zones, the Norfolk Countryside, which still has high quality landscapes, is deemed to have the most scope to accept and absorb suitable and sensitive tourism developments that could present new market opportunities for the District.

3.8 It should be noted that the definition of the zones have been selected not only reflect the tourism offer of North Norfolk, but also to highlight the role North Norfolk has to play in the wider prosperity of tourism in the northern reaches of the County of Norfolk (see Map 3.2). For instance:



Heritage Coast
Forms part of the Norfolk Coast AONB area.
Resorts & Hinterlands
Combines with Great Yarmouth to provide the Resorts offer of Norfolk
Wells-next-the-Sea
Blakeney
Sheringham
Cromer
Holt
Fakenham
North Walsham
Sea Palling
King's Lynn
Norfolk Countryside
Characteristic of the countryside of Norfolk as a whole
North Norfolk Broads
The Broads National Park extends southward as far as Bungay & Beccles
East Dereham
Taverham
Sprowston
Thorpe St Andrew
NORWICH
Key:
Heritage Coast
Resorts
Norfolk Countryside
North Norfolk Broads / The Broads
City Destinations
Main Centres
Map 3.2
The Main Asset Zones of the northern area of Norfolk

- Resorts – Great Yarmouth is actually the largest of the resorts within Norfolk as a whole, and has the strongest visitor association in terms of being a beach destination. In effect, Cromer, Sheringham and Mundesley combine with Great Yarmouth to create Norfolk's overall 'Resort' tourism offer;

- North Norfolk Broads – The overall extent of The Broads' extends southward across Broadland and South Norfolk. However, The Broads, through its National Park designation and unique boating offer, is very much considered a destination that is distinguishable from other key resources of the County, and East of England region. As a result, plans are already being made for The Broads to be branded and marketed as a tourism destination in its own right.

- Heritage Coast - The Norfolk Coast AONB crosses the administrative boundaries of King's Lynn and West Norfolk District Council, North Norfolk District Council and Great Yarmouth Borough Council. Therefore, the 'wildlife and nature' theme and the need for conservation practises for this zone has a much wider concern than just that of North Norfolk itself, and thus provides an important remit of the Norfolk Coast Partnership.

- Norfolk Countryside – As its name suggests, from a visitor perspective, this zone represents the more rural characteristics of Norfolk as a whole. Whilst certain aspects of the main rural features within North Norfolk may be considered unique, these are not strong enough to provide sufficient differentiation to other rural areas of Norfolk.

3.9 From a wider strategic perspective, therefore, the tourism sector within North Norfolk has a fundamental role to play in the prosperity of the tourism across the County. This is very much recognised by Norfolk Tourism, the County's Destination Management Organisation.

Attractions Sector

3.10 North Norfolk District has 54 attractions, crossing the full spectrum of typologies from historic houses to farm-based attractions, to nature reserves, to workshops.

Larger scale attractions

3.11 The attractions within the District which are considered to have the widest appeal include:

- Holkham Hall, which is gradually building a reputation as an estate of national repute;

- North Norfolk Railway Poppyline, as a fully operation rail route between Holt and Sheringham using steam and diesel engine traction trains, is an attraction in its own right as well as providing a more sustainable transport route;

- The Muckleburgh Collection, which has a unique collection of army vehicles and memorabilia, and provides civilians with a rare opportunity to drive vintage tanks;

- The Shrine of Lady Walsingham, which has been a place of pilgrimage for many centuries and continues to attract visitors interested in religious history and artefacts;

- The Thursford Collection, particularly through the growing appeal of its ‘Christmas Spectacular’ show;

- Blickling Hall, which because of its association with the National Trust and its nationwide membership network, has a national audience;

- Felbrigg Hall, again because of its association with the National Trust;

- Blakeney Point Nature Reserve, with boat tours also providing visitors with an opportunity to observe seals in their natural habitat; and

- Cley Nature Reserve, which provides visitors with an opportunity to access important wildlife habitats and eco-systems.

3.12 Whilst individually these attractions do play a role in the overall strength of the tourism product for North Norfolk, their current contribution is considered to be very much supplementary to the primary (natural) assets of the District.

3.13 This is because the attractions lack the distinction, mass, or status to really be deemed as attractions that generate significant volumes of visits in their own right, and help to raise the visitor profile of the local area, if not the County and Region. [Examples of such attractions include Stonehenge, Ironbridge Gorge, Hadrians Wall, The Eden Project and Alton Towers, are all of which are considered to be ‘iconic’ attractions. More locally, such attractions include Norwich Cathedral and Sandringham Palace.] This is not to say that the attractions of North Norfolk cannot be the main motivator for a trip, but rather this is generally restricted to special events at certain times of the year, or for specialist groups rather than having a mass appeal.

Small Scale Attractions

3.14 The remainder of the attractions are relatively small-scale, with many having annual attendance figures of less than 50,000. In addition, many of the attractions are in private or sole-ownership (i.e. not associated with ‘Norfolk Museums & Archaeology Service’, English Heritage or the National Trust), and/or those regarded as ‘lifestyle’-based.

3.15 These businesses operate in a delicate economic environment, often finding it challenging to sustain their medium or long term viability; have difficulty in securing funding necessary to finance up-grades to access, interpretative features, and facilities provision in order to compete in a increasingly sophisticated market; and there may not be the will to ensure that the legacy of the attraction can continue once the current operator/s relinquish their commitment and involvement in the attraction.

3.16 Given the level of businesses that fall into this category in North Norfolk, there is a concern that a large number of attractions could be lost at some stage in the future. Ultimately the loss of smaller scale attractions may be unavoidable. Whilst a regrettable situation, the impact that these closures would have in terms of the overall context of tourism in North Norfolk is regarded to be nominal as long as the attractions of wider significance remain.

Family Attractions

3.17 There are a selection of the attractions in North Norfolk that have a family appeal, not least with the provision of heritage railway attractions that can generate fascination amongst the young through associations with television and story book characters 'Ivor the Engine' and 'Thomas the Tank Engine'; the Norfolk Shire Horse Centre; Priory Maze; and the Maize Mazes.

3.18 However, the analysis of the attractions sector suggests that few of the attractions could be considered to be child-driven. Nearby attractions that fall under this category include Dinosaur Adventure Park, Thrigby Hall Wildlife Gardens, Norfolk Wildlife Centre, and Go-Ape! in Thetford Forest Park.

3.19 On the basis that the main assets and accommodation stock have a high orientation towards the family market, particularly in the Resorts zone, this type of attraction is considered to be a significant gap in the current stock within the District.

Further Attractions Development

3.20 The audit of attractions revealed two new potential developments proposed for North Norfolk:

- a 'Wildlife Garden' within Cromer;
- a new visitor centre at Cley Marshes, which forms part of a £2.5million investment programme to improve flood and coastline defences and better visitor and education facilities.

3.21 The audit also noted that a proposed £15million 'Climate Change Museum', which had the West Runton Elephant as its centre piece, was found to be economically unviable after a feasibility study determined that the centre would only receive around 70,000 visitors per annum, actually half of the number required for the museum to be self-sustaining. However, the Norfolk Museum and Archaeology Service, who are looking after the remains of the mammoth, are said to be keen to find an alternative at some stage in the future.

Existing Accommodation Stock

3.22 North Norfolk is well represented by all of the main types of accommodation. Altogether, it is estimated that the District has:

- 336 serviced accommodation establishments providing 3,496 bedspaces;
- 939 self-catering units, providing 4,320 bedspaces;
- 4,997 static caravans; and
- 4,100 touring pitches.

3.23 The current accommodation occupancy levels suggest the sector is in good health within North Norfolk, with the levels of both serviced establishments and self-catering units generally comparable to Norfolk and the East of England:

- Serviced Accommodation - At present, the bedspace occupancy level of North Norfolk's serviced provision (40%) is roughly equivalent to both Norfolk (43%) and the East of England region (43%). However, the seasonality of the occupancy in the District is much more pronounced, with levels peaking in August but falling sharply between September and November.
- Self catering - The average level of occupancy per self-catering unit is estimated to be 58% (EETB), re-enforced by the business survey results (57.2%). This equates to roughly 30 weeks occupancy per unit. This level is comparable to Norfolk as a whole, and is actually above the levels achieved by neighbouring districts and other districts in the region (King's Lynn & West Norfolk = 53%; Suffolk Coastal = 49%).

3.24 In addition, the accommodation sector remains fairly buoyant about the future prospects of tourism within the District, with nearly half (46%) suggesting that tourism is getting stronger. This is compared to 13% who suggest that tourism is in decline.

3.25 If the accommodation sector is to maintain its current healthy position, there are a number of key issues that need to be raised and addressed. These are outlined as follows.

The loss of serviced accommodation

3.26 There is evidence of a loss of serviced accommodation, both small-scale establishments and larger scale establishments.

3.27 The smaller establishments are generally lost due to changes in lifestyle (retirements, career change, moving from the area) and/or through lack of business to make the operation viable. These losses, in the main, are considered to be natural 'wastage' of unsuitable or outmoded properties

3.28 However, larger establishments are being lost to private developers with many being converted into residential accommodation, which means that this type of change in land-use may not be based purely on economic rationale alone. If this situation is allowed to continue unchecked, the likely change in the current mix of accommodation could have a crucial impact on changing the characteristics of visitors to the District; i.e. greater emphasis on property (static caravan, chalet, house) ownership; more seasonal dependency of other accommodation types (tourers in particular); and less scope to increase market share in certain markets such as business/conference, special occasion and overseas. Arguably, a reduction in the vitality of some town centres, and a change to the character of some historic areas, would also occur.

Monitoring the level of self-catering units

3.29 There is some suggestion that the number of self-catering units, particularly in the Heritage Coast, could be reaching saturation point.

3.30 However, the business survey highlights that opinion is very much polarised between those who feel it is an issue (29% agreeing) and those that don't (37% disagreeing).

3.31 A key test will be to monitor any rises in unit supply against demand and occupancy levels. The current benchmark in terms of occupancy is around 30 weeks; comparable to Norfolk and above the level of other District's within the East of England region. Any changes in this could underlie a growing trend; strong growth could indicate a positive performance which may in turn lead to new demand; a significant fall in occupancy could indicate an over-proliferation of units based on demand.

3.32 An additional benefit of the monitoring of occupancy would be to test the legitimacy of any application to change occupancy conditions from a holiday let to permanent residency, and also to provide a guide as an acceptable 'holiday' period per let. This is because a conversion to a holiday let, which is an acceptable form of conversion, may potentially be used as a means of developing a residential property, which is generally regarded less favourably, 'by the back door' with owners of the property claiming after a period of time that the business is unviable.

3.33 In this respect, encouraging a positive working relationship with self-catering providers, with good representation of units both within a marketing organisation and those let independently by owners required to provide a balanced view. Likewise, the EETB will require feedback of results to enable comparisons with other authorities within the region.

Quality standards & Accessibility for all

3.34 Currently, the District is estimated to have:

- 50% of all serviced bedspaces quality graded.

- 22% of self-catering units inspected under the ETB scheme, although further establishments also appear in specific self-catering marketing organisations, such as English Country Cottages, Countryside Cottages, Norfolk Cottages, Blakeney Cottages and Key Cottages. All of these organisations have strict guidelines as to the type and quality of each establishment accepted.

- 20 holiday and camping and caravan parks ETC quality graded, which represents over half (52%) of static caravans, and nearly two-thirds (62% of 3,283) of touring pitches. In addition, eight parks have received the 'David Bellamy Conservation Awards' for incorporating initiatives to raise environmental issues, awareness and sustainable practice within the operation of the business and amongst visitors with regards to their own behaviour.

3.35 However, this still leaves a high proportion of accommodation establishments that aren't quality assured.

3.36 In addition, in terms of disability access the District appears to have a very low level of provision that can cater for people with disabilities. This needs to be addressed in accordance with the strengthened 'discrimination' act which requires reasonable effort to be demonstrated in providing access to all.

3.37 The Council has taken a firm stance on the promotion of only quality-graded accommodation for all types of accommodation, and this is to be commended. Nevertheless, in conjunction with this stance, the Council needs to raise awareness of the importance of raising quality standards and that it is not just a decision that would benefit the business, but is based upon the principle that it would help raise the profile of North Norfolk as a quality-driven destination.

The loss of touring provision

3.38 The planning review has revealed that several planning applications have been given approval which resulted in touring pitches being converted into static units

3.39 From a business perspective, static provision provides a greater level of income generation in comparison to touring visitors through both the sale of units and land rental charged on an annual basis. From a strategic perspective, static ownership can generate year-round visits and guaranteed repeat visits. As such, there is a prevailing trend towards allowing these types of development.

3.40 However, a balanced approach is needed to ensure sufficient touring stock remains in the District. This is because touring pitches can have a stronger benefit from a wider tourism perspective, with tourers more likely to be new or infrequent visitors, and therefore have a greater propensity to visit attractions and places of interest, and spend their money in shops, particularly in having to replenish food stocks on a regular basis, and on entertainment. As such, tourers help to revitalise the visitor economy to a greater extent than property owners.

3.41 The visual impact of tourers is also very much temporary, and restricted to certain times of year. Static provision on the other hand provides a permanent structure within the landscape, particularly along prominent seafront/sea cliff positions where there is little or no evidence of screening. This is already highly evident within the Resorts zone of North Norfolk.

3.42 Whilst overall there is a good level of supply of touring pitches within North Norfolk. The Council should aim to maintain a balance of touring pitches and static provision. It is recommended that the current guidance on this type of development be expended to include consideration to the wider impacts, and to retain touring provision particularly in areas with low provision currently.

Decline in demand for Chalets

3.43 The Chalet product across within North Norfolk faces an uncertain future.

3.44 There is growing evidence from around the UK that chalet parks are being purchased and improved through the replacement of the now dated chalet blocks with static caravans, and/or woodland-style lodges.

3.45 However, evidence from other authorities suggests that care should be taken when reviewing proposals regarding Chalet accommodation:

- Caradon District Council, for instance, has noted that proposals they receive for this type of development would see the lodges sold to private owners or as part of a time-share offer, and therefore exacerbating the issue of secondary land/property owners within the tourism market mix. Even though conditions can be used to control this they require careful monitoring and enforcement.

- North Cornwall has had a recent occurrence whereby renovated chalets on a park were purchased mistakenly as residential properties. The new owners inadvertently breached the occupancy conditions on these properties and subsequently the Council was placed within the position of having to take legal action.

3.46 With the Chalet Park sector in North Norfolk representing only a small proportion of the overall accommodation stock within the District, neither situation is envisaged to be a critical issue in the future. The replacement of chalet with woodland lodge-style developments, if proposed, would present a growth opportunity for North Norfolk. These types of development require high value landscapes, with particular associations of exclusivity, low density and remoteness. Their design and available facilities are much more modern and attractive than the structures they replace, and they also have a strong appeal to AB socio-economic groups.

3.47 It is therefore recommended that permission be given to proposals that seek to improve or change the chalet product, but that strict stipulation and enforcement of occupancy conditions are.

Gaps in accommodation provision

3.48 The audit of accommodation found that there are gaps within current provision, including:

- high quality (4-5* graded) hotel, particularly one which includes spa and health facilities;
- hotels which have the capacity and appeal to attract groups, conferences and special occasions for example;
- inn-classified accommodation, i.e. pubs with accommodation space, rather than a 'self-defined' hotel with pub and/or catering facilities;
- woodland lodge-style developments, for the reasons outlined above; and
- a budget accommodation operation.

3.49 Whilst it is felt that there is potential for these types of developments to be encouraged in North Norfolk and that they would add a new dimension to the current stock, consideration must be given to siting these developments in areas that have capacity to absorb them, and where they would be complimentary to existing provision rather than competitive in nature. In particular:

- A top-quality quality hotel development will be likely to require high value landscapes. With the 'Resorts' and 'Heritage Coast' having high levels of current capacity, and the 'Heritage Coast' (AONB) and 'North Norfolk Broads' (National Park) both having policies which discourage large scale development, the most appropriate zone would appear to be within the 'Norfolk Countryside' zone.
- A large scale hotel that can cater for groups, conferencing, and special occasions will require siting close to good access routes that lead to the main centres within the area, i.e. routes leading to/from Norwich, King's Lynn, Great Yarmouth and Cromer.
- Inns should be encouraged to provide serviced accommodation in the zones of least current overall accommodation provision, with the benefits being quick, cheap and effective means of raising stock without the need for new builds and conversions; spreading the benefits of tourism

better across different zones; and providing new sources of revenue for pubs in more remote locations. The 'North Norfolk Broads', in particular, could benefit from expanding this type of provision, along with 'Norfolk Countryside'.

- Woodland lodge-style developments require high value landscapes. For similar reasons to the preferred siting of the top-quality hotel, 'Norfolk Countryside' is considered to have the best potential to cater for such a development. These types of developments could also be considered in other zones where the lodge application would see the replacement of old or redundant chalet and/or static provision. Evidence that design, density, and screening issues have been addressed appropriately should be an important component of the application.

- Budget accommodation operations have the benefit of helping raise the profile of the local area through the strength of the brand alone. However, disbenefits include competing with smaller operations such as inn accommodation and B&B's, and 2/3* hotels, for example, on a price basis in relation to quality or perceived quality. As a result, the location of any proposed budget hotel needs to be carefully measured in terms of its overall impacts to the surrounding area. The likelihood of siting a budget operation within North Norfolk is considered to be slight given the lack of business centres and trunk roads. If this situation changes, it is recommended that any interest be directed towards appropriate centres within the 'Norfolk Countryside', particularly around Fakenham, as the zone which has a greater requirement for serviced bedspace provision, profile raising, and is central to the main access routes.

3.50 In all cases, additional consideration should be give to the impact that accommodation developments would have on neighbouring zones and how visitor behaviour will be affected.

Additional Visitor Amenities

3.51 The additional visitor amenities and supporting services represent important components of the tourism offer of any destination, either through providing key features of interest, or defining the sense of place, or providing opportunities to participate in pursuits or activities of interest.

3.52 The review of visitor amenities found that North Norfolk has particular strengths in:

- **<u>Cromer Pier</u>** - Cromer Pier offers an amenity within the District that is 'iconic' of British Coastal resorts. The benefits of Cromer Pier over other piers in the UK is that it has managed to retain its heritage and ambience from days gone by and has resisted more modern day additions such as amusement arcades and fair rides for example.

- **<u>Shopping</u>** - The shopping experiences available are a key strength, particularly through the boutique and antique shops available at Holt; the mix of branded and 'trinket' shops at Cromer;

and the range of markets and farmers markets held across the District including North Walsham, Stalham and Fakenham.

- **Walking** - There are a variety of walking routes available throughout the District, including those which form part of nationally renowned routes (Paston Way, Weavers Way, The Norfolk Coast Path), and a wide range of circular walks, the majority of which start and finish at key towns or villages such as Blakeney, Sheringham, Fakenham, Holt and Stalham.

- **Cycling** - The audit has discovered that there is a concentrated effort amongst a number of organisations to promote cycling within the District, including:

  - Three SUSTRANS routes;

  - Quiet Lanes Cycle initiative being piloted in North Norfolk;

  - The Bittern Line encouraging cycle day-trips within North Norfolk by accepting the carriage of bikes, providing incentives to hire bikes through a money-off scheme, and the production of its own cycle route map 'Around the Bittern Line'.

  - Kelling Heath and NNR – Poppyline have combined to create a day-out combining bikes and rail.

  - The Broads Cycle route, complimented by The Broads Hopper Service which has bike carriage facilities.

- **Sports and Leisure Facilities** - The District has other sports and leisure amenities available to assist the promotion of North Norfolk to visitors including:

  - Three golf courses of repute;

  - An array of opportunities for fishing, be it fly-fishing, sea fishing or coarse fishing;

  - Other countryside-based activities, including hunting and shooting (though these tend to be controversial activities)

3.53 The annual carnivals that are held within the District, particularly Cromer and Sheringham, are also considered to be attractors of visitors to the District.

3.54 Despite this level of amenities, there are nonetheless some gaps in provision, noticeably in terms of outdoor adventure activities, and in promoting water-based activities. Given the context of the District in terms of its coastal location and association with The Broads, this is seen as a significant opportunity.

Visitor Facilities & Services

Visitor Information Services

3.55 The financing and management of Tourist Information Services represents a significant concession to tourism by Local Authorities. North Norfolk District Council, through the management of its four TIC's, is no exception.

3.56 The primary role of TIC's has traditionally been to provide a front-facing information service to visitors regarding where to stay and what to do in the area, either before the visit during the data gathering and decision-making process; and/or once visitors are at the destination.

3.57 The importance of the information network should not be underestimated. Whilst information is gathered before visitors arrive, the information network once at the destination has a key role in directing visitors to the key assets and fulfilling their expectations. Moreover, in an increasingly commercially driven environment, the role of the TIC now tends to include booking services for accommodation, transport, tours, etc; providing insightful guides as to the main activities that should be undertaken; and promoting linkages that will result in increased visitor spend within the District.

3.58 The information network in other districts are being developed to go beyond the TIC, to include:

- auxiliary visitor information points, based within businesses and services open to the public (i.e. a general store, news agency) in town's and villages that don't include TIC's. These points tend to include a notice board, area map, literature rack, and increasingly computer Kiosks for example; and

- stand-alone visitor information points at key locations, such as key landmarks and viewing points, or incorporated into attractions; with consideration also given to

- tourism signposting, which can help to create a positive first impression by enabling visitors to easily find their destination.

3.59 North Norfolk is considered to be lacking a comprehensive information network in comparison to other districts within the UK. With the exception of two 24-hour kiosks being placed in the towns of North Walsham and Fakenham (which have replaced the TIC's), there appears to be gaps in information provision outside of Cromer, Sheringham, Holt and Wells-next-the-Sea, a factor noticed by some businesses and consultees as a concern. Ideally, to spread the benefits of tourism throughout the District, an integrated information provision programme that raises the awareness of what there is to do and see across the District should be developed.

Transport Network

3.60 Whilst public transport is being developed further as a means of sustainable movement around the District, it should be recognised that utilising public transport can actually provide a significant part of the ‘enjoyment’ of any day trip out from a visitor perspective. This is particularly true in North Norfolk where attractions combine with transport with the NNR – Poppyline, from Sheringham to Holt, and to a lesser extent Wells & Walsingham Railway both provide combine alternative ways of travelling between the towns and villages, as well as being attractions in their own right.

3.61 A strength of the transport sector in terms of tourism within North Norfolk is that it already has services that have the needs to visitors very much in mind. This includes:

- the Norfolk Coast Hopper, from Cromer to King’s Lynn, and its Rover and Rover Plus tickets for hop-on/hop-off services;
- the Broads Hopper, from Blickling to Acle, including its cycle carriage facilities; and
- the Bittern Line, from Norwich to Cromer.

3.62 It is recommended that these routes be developed and enhanced in accordance with a recognised demand, and/or in response to the needs of certain areas to reduce car movement.

Car Travel

3.63 Despite moves both locally and nationally to promote the use of sustainable modes of transport by both local and visitors, the car will continue to dominate as the preferred method of travel to and around North Norfolk.

3.64 Any increase in the volume of traffic in North Norfolk could pose potential problems for the current road network and future tourism potential of the District. Traffic is already cited by some local residents (anecdotal evidence from Norfolk Coast Partnership) as being a key issue with regards to the impacts of tourism from their perspective. Moreover, visitors (RSPB survey) themselves highlight the volume of traffic as a key dislike of the District; and a quarter of businesses (business survey that accompanies this study) suggest that the poor local transport network is a major constraint to the success of their business.

3.65 In this respect, it will be essential to have a clear policy and guidance on traffic, travel, transport and tourism based upon shared principles and that is designed to attain the same goals. These policies will also need to bear in mind the sensitivities of each of the zones, with the Heritage Coast and North Norfolk Broads especially needing to encourage more sustainable modes of travel.

Market Context

Overnight Visitors

3.66 A key strength of tourism in North Norfolk is that it is still, on the whole, a long stay destination, with the average length of stay even for domestic visitors being 3.9 nights. This is in contrast to the UK where short breaks are much more prevalent. This situation is assisted by the high level of static caravan and second homes ownership which virtually guarantees long stay trips amongst owners.

3.67 However, the likelihood is that short breaks will become more prominent in North Norfolk over time, particularly amongst tourers and those who use serviced accommodation.

3.68 This study has revealed a noticeable lack of research across the whole of the District in relation to the characteristics of visitors, their composition, reasons for visiting, frequency of visiting, or their likes or dislikes. The most recent visitor survey was conducted by the RSPB in order to determine the Economic Benefits of Environmental and Wildlife tourism in the Norfolk Coast AONB in 1999. This survey revealed that the main character of visitors to the AONB were:

- predominantly adult groups;
- either on holiday (46%) within the study area, or on a day trip from home (28%);
- primarily interested in the combination of the wildlife (59%), scenery/landscape (58%), peace and tranquillity (47%), and beaches (39%);
- envisaging undertaking a walk (77%) and/or bird watching (60%);
- visiting because of the association of the area with peace and tranquillity, the scenery and landscape, the pace of life, and the birds and wildlife, suggesting that they view the area as a place to getaway from the stresses and strains of their lives; and
- disliked the lack of visitor facilities (toilets), parking (including high charges), traffic issues, and increasing numbers of visitors.

3.69 Whilst valuable, the information itself is considered to be dated. Moreover, the characteristics of visitors to Cromer or Sheringham, for example are likely to be considerably different; i.e. a high level of family groups and older age groups, predominantly staying in non-serviced or owned accommodation, with their main activities being related to the beach and shopping areas.

3.70 We are aware that The Broads Authority have initiated a visitor survey for the National Park as part of its strategy process which will cover the North Norfolk Broads zone, whilst the Norfolk Coast Partnership are also initiating a visitor survey to cover the Heritage Coast Zone. We would recommend that North Norfolk District Council complete a similar exercise for the Resorts and

Norfolk Countryside zones to build a more complete picture of the character and interests of visitors throughout the District.

Overseas Visitors

3.71 The overseas visitor market represents only a small proportion of the overall visitor sector to North Norfolk. However, the benefit of attracting the overseas market is in the overall duration of trip (7 nights) and spend per night (£44.66) which are much higher than domestic visitors.

3.72 Due to the lack of visitor research, there is little information to determine the motivation behind overseas visits to North Norfolk. However, the North Norfolk Broads (Broads National Park) and the Heritage Coast both have specific features of interest that have the potential to appeal to an international audience either interested in wildlife, landscapes, architecture, shopping and certain heritage aspects.

3.73 The two major developments in overseas travel, i.e. the growth of low cost airline travel at Norwich Airport and the proposed East Port facility, both have the potential to act as significant carriers of overseas visitors to Norfolk.

3.74 The disadvantage of North Norfolk in this respect is the lack of trunk roads to carry traffic (cars and coaches) to the District, particularly from the EastPort. In addition, the lack of awareness of the assets to overseas audiences, which contributes to the current low level of overseas visitors, would need to be addressed before the overseas market could become a more valued and valuable proposition for the District's tourism sector.

Day Visitors

3.75 There is some debate as to the volume and value of day visits received by North Norfolk. The latest figures produced by the EETB in 2003 appear to be somewhat overstated (8.5million trips), particularly in relation to the level of countryside visits (5.4million) versus coastal visits (910,000).

3.76 A Scott Wilson review of the drivetime catchment, using Cromer as the focal point, has revealed that North Norfolk has approximately 2.1million residents within a 2-hour drivetime. This reduces significantly to just over 665,000 within a 1-hour drivetime, and just 60,000 within 30-minutes, a consequence of the relatively low level of population within Norfolk and the lack of trunk roads once within District itself.

3.77 As such, the District relies nearly as much on pulling in tourists from other districts (i.e. Norwich, Great Yarmouth and West Norfolk and King's Lynn) as it does from its own catchment population. Evidence of this is provided by the RSPB research which found that 28% of respondents were out on a day trip from home, and 22% were on a day trip whilst on holiday in another area.

3.78 Overall, therefore, the day visitor potential of North Norfolk is considered to be constrained despite having appeal and assets that could have strong day visitor attractors (beach, wildlife, countryside). Moreover, this is likely to remain in the near future because of the District's relative isolation and lack of trunk road access.

3.79 In the longer term, there is a suggestion that the geography of the day visitor market is expanding, largely caused by innovations in air travel and the advent of the budget airline. This has opened up both domestic (from Newquay, to Aberdeen, to Norwich) and international destinations (Paris, Brussels, Munich, and even Krakow, Sarajevo, Marrakesh and St Petersburg). However, the ability of North Norfolk to exploit this development appears restricted at present due to lack of awareness, promotion and branding. Moreover, the capability of the District to maintain its overnight destination status is considered to be higher priority than driving increased numbers of day visits, with the economic potential of day visitors much less per head than their staying counterparts.

Niche Markets

3.80 The review of niche markets aims to place any further development within the context of the main potential of North Norfolk, but does not seek to provide commentary on specific techniques or branding that could be used to attract them.

3.81 It has already been recognised earlier in this report that the prime emphasis for tourism development within North Norfolk is to utilise its assets to their full potential. In this regard, the following markets have been identified as key areas for concentration for future development:

- **Cycling tourism** – Cycling as a tourism activity is growing in popularity across a broad range of groups. The advantage of North Norfolk is that the environment is fairly gentle and therefore lends itself to a more general cycling market, not least amongst families. North Norfolk should therefore aim to excel in providing opportunities for cycling, expanding on the wealth of initiatives that have already been introduced both by the public and private sector.

- **Walking** – Although North Norfolk is not a renowned walking destination, walking is the prime activity that people tend to undertake once at a destination regardless of whether it was a key motivation behind the visit. Therefore, opportunities for walking and provision for walkers is still considered a priority for further development within North Norfolk. This should be closely aligned with the wildlife, nature and natural environment, with walking perhaps not being the key driver but rather a by-product of wanting to view a specific feature of interest.

- **Water-sports** - Given the District's coastal region and proximity of the Broads, water sports provide a key opportunity for tourism within North Norfolk, and one that remains relatively under-exploited to date. Sailing, canoeing/kayaking, surfing, and fishing all present 'softer' activities related to the water, with jet-skiing, water-skiing and power boating having more adventurous overtones. Whilst the softer activities have a definite synergy with the environmental context of the Heritage Coast and North Norfolk Boards, the potential of the harder activities would need to be investigated further to determine the benefits versus any damaging environmental and social effects.

- **<u>Nature and Wildlife</u>** - The Norfolk Coast AONB, Heritage Coast and the Broads National Park all offer opportunities for visitors to experience and discover unique wildlife, habitats and environments, targeted towards this potential growth market. Nevertheless, the product needs to remain sustainable, which means that growth needs to be strictly managed and maintained. The Norfolk Coast Partnership and The Broads Authority will be particularly important stakeholders in agreeing the future principles behind any growth strategy for this market.

- **<u>Health & Wellness</u>** - The Health and Wellness sector appears to be relatively under-exploited in North Norfolk. The benefit of provision in health and wellness facilities is that they bring new markets to an area, with the provision itself being the prime motivator. In particular, facilities need to be associated with high value landscapes and environments, with a degree of exclusivity and remoteness in order to complete the full ideology of a health and wellness visitor. In this respect, it is felt that North Norfolk appears ideally suited to the health and wellness market, and thus is an opportunity that needs to be utilized.

3.82 Each of these markets will require some form of land designation specifically for their own purpose, either through the securing and developing of existing public rights of way and routes for walkers and cyclists; moorings and launch sites for water-sports; habitat and ecosystem protection zones and lookout/observation points for wildlife visitors; and site identification and facility construction for health and wellness visitors. Furthermore, all will need signposting, access/entry points, and associated facility and service provision (accommodation providers, food and drink establishments, secure lock-up facilities, etc), which needs to be considered as part of a holistic approach to developing the product to cater for these markets.

3.83 In addition to these, the traditional markets for tourism in North Norfolk should also remain a key priority:

- **Family market**, with growing evidence that children are being integrated into the lifestyles enjoyed by adults before parenthood, which means that rather than changing their attitudes and preferences, parents will look for ‘child friendly’ choices within their usual repertoire of spending habits including holidays;

- The more **mature market**, with the advent of the ‘silver surfers’, is now a recognised market associated with real potential. Benefits include the 50+ group being relatively affluent; heavily associated with ‘nostalgia tourism’, and reliving experiences of traditional English resort holidays from their youth; being able and willing to visit out-of-season; and having a tendency for more comfortable/luxurious accommodation types. As a result, it is envisaged that a concerted effort to target the more mature markets will be a high priority for many destinations in the UK.

- **Shopping**, with the need to build upon the reputation of Holt as an up-market shopping destination, and to drive distinguishing products through farmers markets and craft fares for example.

- **Disadvantaged groups** and groups with disabilities, which provide an important market for the tourism economy.

Schools Market

3.84 The schools market already represents a strength in the context of North Norfolk's visitor market.

3.85 Kingswood, one of the largest operators of education centres in the UK, has two centres located along the coastline; whilst a further four dedicated centres have been identified, with a mix of residential and activity centres.

3.86 Kingswood in particular has a valued reputation within the market, and has a business model that brings in large volumes of school trips, both in school term and outside of school term. At present, their operations are very much self-contained with all activities taking place in-situ. Nevertheless, there may be an opportunity to align attractions to certain programmes offered at both Kingswood and other education centres, including environmental education, biology and the study of sensitive ecosystems, conservation and sustainability practises, and so on. This should be explored further with the education centre providers, with particular emphasis on providing a fully pre-risk assessed offer to schools.

Groups Market

3.87 The Groups market is under-exploited within North Norfolk due to a lack of accommodation provision that can cater for large numbers of visitors. As a result, there are few coach tour operators that have links with North Norfolk as a group tour destination.

3.88 Currently, the main influx of coaches is derived from those who travel to North Norfolk on a day visit option from other overnight destinations, such as Great Yarmouth, Norwich and King's Lynn, or by those visiting the Norfolk Broads; or from coach tours organised day trip from home, with a tendency for these trips to be associated with specific groups such as the RSPB. This in contrast to Great Yarmouth, Norwich and the Norfolk Broads which have listings from key coach tour operators WA Shearings, National Holidays, and Epsom Holidays, for example.

3.89 The future potential of the Group Travel market will be largely dependent upon the availability of hotels that have the quality and capacity to cater for large numbers, with the majority of hotels in the

WA Shearings brochure for example being 4-star/diamond rated. This is considered a key weakness in the current provision within North Norfolk, especially given the Resort destinations of Cromer and Sheringham.

Tourism Benefits

3.90 According to the 2003 economic impact study, the overall tourism spend in North Norfolk supports 7,069 FTE's, of which 84% are employed directly as a result of visitor spend activity. It is estimated that the largest employment sectors supported are food & beverage facilities (40% of FTE's) and accommodation (26% of FTE's).

3.91 To highlight further the importance of tourism to the economy, in 2000 a review of the employment sector suggests that around 12% of the North Norfolk workforce is employed in the Tourism and Leisure sector. The 2001 Census suggests that the workforce of North Norfolk employed directly in Hotels and Restaurants could equal 7.3%.

3.92 The review of accommodation, however, revealed that the main opportunities for employment are at the lower end of the skills level; i.e. cleaning and maintenance, and service staff. Only the larger hotels, or holiday park sites offer opportunities for supervisor and management roles. As such, the main skills requirement for staff is with regards to effective communication and customer service, with other attributes being a willingness to learn; flexibility of working hours and conditions; personal appearance; ability to follow instructions; and ability to team-work. Employees need to be encouraged to promote tourism as an attractive career opportunity which has good pay, conditions and hours, and which attaches training programmes that aim to address these skill shortages.

3.93 Focusing on tourism employers, however, only depicts part of the make-up of tourism sector business and their skills needs. The majority of businesses are small-scale operations, which have a high proportion of self-employment. In addition, tourism is a sector that can lead to entrepreneurial growth, with new opportunities to supply a new service or to exploit a new market or activity. The individuals involved in these types of business require start-up, management, legislative, marketing and promotional skills.

4 Strengths, Weaknesses, Opportunities, Threats

Strengths	Weaknesses	Opportunities	Threats
The environmental assets and appeal: • Resorts • Heritage Coast • North Norfolk Broads • Norfolk Countryside	The assets aren't solely associated with North Norfolk; The Broads, Norfolk Coast AONB, Resorts, Norfolk Countryside all have a much wider area of concern.	Raise the profile of the assets to a wider audience Target specific assets at key user groups	Failing to conserve or protect these assets. Continued low awareness of the assets. Competition from overseas and other destinations in the UK with similar assets
The high level of attractions available. Attractions cover the spectrum of different types.	No 'iconic' attractions Few attractions of regional or national repute. Lack of family, child-driven attractions. The majority of attractions are small scale, many are 'lifestyle' attractions.	Attraction theming to strengthen attractions offer, to include those within the wider area of northern Norfolk. To develop a family, child-driven attraction.	Loss of small-scale, lifestyle attractions over time (no one to continue legacy) General decline of the tourism sector. Seasonality of tourism sector in the District.

Strengths	Weaknesses	Opportunities	Threats
Good level of accommodation stock across all sectors (serviced, self-catering, holiday parks, camping & caravan sites)	Serviced – mainly small scale with few large establishments. Serviced – some loss of larger hotels for residential and other uses. Self-catering – suggestions that number of units is reaching capacity. C&C – some evidence of touring pitches being converted into static units. Lack of quality within serviced accommodation stock, particularly amongst smaller establishments. Lack of provision for people with differing abilities	To develop a high quality hotel To investigate the potential for further woodland lodge development Accommodation to incorporate environmental practises LDF to address key issues	Continued loss of serviced accommodation. An over-proliferation of self-catering units. An over-proliferation of privately owned static units. General decline of the tourism sector. Seasonality of tourism sector in the District.

Strengths	Weaknesses	Opportunities	Threats
Good level of additional visitor amenities; cycling, shopping, walking, sports and leisure, carnivals and events. Some facilities used by visitors already have a visitor focus; i.e. certain public transport routes	There are some key gaps within the market in terms of provision: • Water sports, and adventure activities • Health & Wellness • Special events Perceptions of poor traffic systems, exacerbated by visitors.	To excel in cycling provision. Grow walking as an additional activity to undertake, associated with other features (wildlife watching). Seek opportunities to develop amenities for growth markets (wildlife, health and wellness). To aim to develop the District as a destination for certain/sustainable water sports.	Potential loss of local communities (purchase of local housing stock as second/holiday homes). Resident's resentment towards tourists at key spots if visitor levels rise.
New impetus for tourism within the Council as part of the LDF process.	Lack of recognition of tourism across Council departments. No current strategy, or vision for tourism. Little formal means of communicating with the industry sectors ("them and us mentality") and key stakeholders. No dedicated tourism officer. The Council has restricted the level of influence it can have on Norfolk Tourism by withdrawing membership.	LDF presents an opportunity to bring tourism high onto the agenda, recognise its contribution and define the role of tourism in the future prosperity of tourism. Recognising the role that North Norfolk could and should play in developing tourism across the County.	That the Council doesn't grasp this opportunity to recognise tourism and its potential, the need to maintain its current economic contributions, and therefore invest in appropriate projects to fulfil its vision for tourism.

5 Vision & Aspirations

5.1 North Norfolk is one of the most distinctive and diverse tourism District's within the East of England region. It is home to traditional 'English' beach resorts of Cromer, Sheringham and Mundesley; its eastern section forms the northern reaches of The Broads National Park; and its western reaches are renowned for the quality of its natural environment, and being home to some of the of the most precious ecosystems found along the English coastline.

5.2 These assets form the District's appeal from a tourism perspective, and therefore represent the core foundation for the future development of tourism within North Norfolk.

5.3 In providing a lead role in the future development of tourism within North Norfolk, the Council should establish a clear vision and aspiration for tourism in relation to how the sector should be developed, and how to manifest its contribution to the prosperity of the District.

Vision

5.4 The vision for North Norfolk is to develop a tourism sector that is synonymous with offering a quality experience to all visitors; has an emphasis on organic growth utilising current capacity; and seeks to maximise the value of tourism both in terms of additional visitor spend, and strengthening linkages between local businesses.

5.5 The approach needs to be balanced against the context of the natural environment as the most crucial aspect of the tourism offer; maintaining the prosperity of local businesses as the front line interface with the visitor; and which is reflective of the concerns of the community, who both have a reliance on tourism but who also feel the impacts of tourism first-hand.

5.6 Through the adoption of a zoning approach, the Council should seek to utilise the current assets and appeal to maximise the experience of visitors and promote strong value growth of tourism throughout the District:

- **Resorts & Hinterlands** – to build upon its position and reputation as the prime beach destination on the North Norfolk coastline, and as a destination that excels in catering for families. This zone will continue to drive visits to the District through its high accommodation stock. The strong associations of Cromer Pier, the promenades, and other traditional/positive perceptions of a typically 'English' beach resort (fish & chips by the sea; the 'end-of-pier' show), needs to be utilised fully to capture the imagination of the visitor, particularly in respect for generating 'nostalgia' driven tourism trips.

- **Heritage Coast** - to appeal to visitors whose prime focus will be on soft activities, who are more aware of the environment and its sensitivities, and who are less likely to inadvertently cause damage. This zone is best suited to tap into the growing 'wilderness and wildlife' visitor sector, though this will need to be carefully considered against environmental concerns.

- **North Norfolk Broads** – to be the northern gateway into The Broads National Park, emphasising the strengths of the Barton, Hickling and Hoveton broads, and the northern reaches of rivers Ant, Bure and Thurne. Particular attention should be given to encouraging alternative forms of exploring the broads, via walking, cycling, canoeing/kayaking, and the benefits they generate – discovering unique villages, architecture, and wildlife – and the relative piece and tranquillity of this section of the Broads (real escapism) [i.e. the real life Centre Parcs].

- **Norfolk Countryside** – to define its position as a buffer zone that can absorb and filter some of the visitor pressure away from the more sensitive zones such as the Heritage Coast; provide additional capacity where key gaps have been identified, i.e. a high quality hotel with spa facilities, a budget hotel, woodland lodges, and/or children-driven family attractions; and explore the potential for diversifying the tourism product through new market opportunities that have a specific synergy with the other assets, i.e. health and wellness tourism, conference, special occasions, and some forms of adventure activity tourism.

Tourism Development Principles

5.7 The underlying principles for all zones should be to:

- **Promote Sustainable Tourism Practise** - To adopt the principles of sustainable tourism development within all facets of the sector (public, private and voluntary), which seeks to maximise the potential of tourism against the background of preserving and conserving the assets that make the local character unique.

- **Maintain Visitor Volume** - To maintain and retain current visitor volume and markets, and seek organic growth within identified market opportunities by utilising spare capacity where appropriate, unless seeking to exploit a specific gap in current provision.

- **Increase Visitor Spend, and the Value of Spend** - To encourage growth in visitor spending to match/surpass the County and Region through strengthening the offer, quality and promotion of key spend categories such as food and drink, entertainment and attractions, and shopping; and to increase the value of local spend to the economy by strengthening the local supply chain.

- **Support Appropriate Investment** - To facilitate appropriate development, promotion and strengthening of front-facing tourism plant, (i.e. accommodation, attractions, amenities, facilities and services) across the District where it seeks to improve visitor experiences, or which is designed to generate interest from new visitor markets/diversify the current offer.

- **Delivering a Product Synonymous with Quality** - To encourage all businesses involved in tourism to deliver and promote a high quality of service, linked to specific programmes and classification schemes, and training courses that focus on customer care, communication, and service.

- **A Partnership Approach -** To promote confidence within the all stakeholders (local authorities and bodies, businesses, the local community and environment protection groups) by reinforcing the partnership approach which is inclusive and reflective of all interests.

- **An Integrated Approach** – To integrate the local tourism development framework within the different sectors of the Council that will have an influence on the prospects of the tourism sector as a whole (economic development, travel and transport, coastal protection, environmental health, emergency planning, homes and housing, waste and refuse, conservation and design, information services, marketing and promotion, public amenities); and within the wider context of tourism across the County and Region (The Broads, Norfolk Coast AONB, Resorts and Countryside).

Market Context

5.8 Whilst it is not the purpose of this document to act as a strategy for tourism, the study process has revealed opportunities and strengths that we feel that the District should aim to excel in:

- **Cycling-driven** day trips and overnight visits, through the provision of appropriate routes linked to accommodation and amenity establishments that are developed and promoted with the needs of cyclists in mind.

- **Nature-based tourism** linked to the Heritage Coast and the North Norfolk Broads, with the promotion of out-of-season trips associated with events in the wildlife calendar, with spring and autumn being the main periods, and summer and winter being secondary.

- **Water-sports** that are complimentary to the natural environment, such as sea kayaking along the Norfolk Coast; river kayaking and canoeing in The Broads; surfing at Cromer, Sea Palling, Mundesley and East Runton; sailing off the Norfolk Coast and within The Broads; river fishing; and sea fishing, including Boat Trips from Blakeney for example.

5.9 This should be in addition to providing a top-quality experience for families, within a child friendly atmosphere; and appealing to the more mature markets particularly targeting nostalgia driven trips.

5.10 There is also potential for the District to explore the benefits of other niche groups such as:

- **Health & Wellness** – this has a particular synergy with the local landscapes, rural characteristics, and sense of isolation that is apparent within North Norfolk;

- **Special interest** – particularly those which are match the countryside image of North Norfolk, such as landscape painting, country cooking, gardening, working farms.

- **Outdoor activity** - investigating the possibility of attracting outdoor adventure activity operators within the Norfolk Countryside to attract day visitors, and strengthen the mass of ‘activities’ that could be undertaken in District by activity enthusiasts. This could include hot air ballooning, skydiving, and off-road vehicle driving for example.

6 Recommendations

6.1 The following section highlights the key recommendations designed to assist the future development of tourism within North Norfolk.

Two Fundamental Issues

6.2 Prior to detailing the recommendations, it is important to consider two fundamental issues that will need to be considered in the context of the future prosperity of the tourism sector within North Norfolk, namely:

- maintaining Sustainable Communities; and

- protecting the Natural Environment.

Sustainable Communities

6.3 The unique character and high value landscapes of certain parts of North Norfolk, especially the 'Heritage Coast' zone, means that it is a very desirable place to visit amongst the more affluent groups. This is symptomatic of the AONB area as a whole, with areas within the AONB being dubbed 'Chelsea-by-the-Sea'. As a consequence, the area is susceptible to high levels of houses being purchased as second homes and holiday lets, a factor reflected by the zones high density of self-catering units.

6.4 The removal of houses from the local market is a concern for North Norfolk as a whole, but particularly for the AONB/Heritage Coast zone where it is estimated that as much as 15% of the housing is classified as a being second home rather than a permanent dwelling.

6.5 The impact of second and holiday homes is to dilute the sense of community within the location of residency; it can lead to the loss of essential local services that can no longer be sustained due to a lack of local residents; lead to a rise in property prices to a point whereby houses become unaffordable to the local market; which in turn can create a loss of essential workforce, particularly in the lower income areas such as tourism and 'key worker' sectors. Ultimately, therefore, the local residents can be resentful of second homeowners and holiday visitors who they feel have little or no benefit to the immediate community, and tourism as a whole.

6.6 This effect is being felt in many attractive rural environments in the UK, with potential changes in pension tax incentives that allow pension funds to be invested in the purchase of second homes, and a rise in people choosing to work from home both forecast to raise the appeal of second home ownership and blurring the grey area of permanent residential versus holiday occupancy.

6.7 This will not be an easy issue to resolve, with many authorities looking at potential solutions. To date, there is no evidence of any policy that effectively curtails the purchase of existing properties available on the open market as second or holiday homes. Previous attempts to do so (such as Exmoor National Park trying to introduce a policy aimed at restricting the sale of existing houses as second/holiday homes) have proved controversial and impossible to implement.

6.8 The extent of the influence of local authorities at present is focussed on proposed new housing developments, with evidence of National Park Authorities stipulating that any new developments must be based on evidence of local needs, and that occupancy conditions are applied through section 106 agreements. In the case of the Yorkshire Dales, for instance, the planning policy stipulates that new housing development will not be permitted within the National Park unless:

- it can successfully demonstrate that it will meet one of six specific ‘local needs’;
- it will be directed towards new buyers and young households,
- each house will be no greater than 90sq meters (a maximum of 3-bedrooms);
- the total development has no greater than 30-35 developments per hectare; and
- that each property is subject to a section 106 agreement that states it cannot be purchased as a holiday let or second home at some stage in the future.

6.9 North Norfolk, through the existing Local Plan, already encompasses certain elements of this type of policy. The potential for new housing development within North Norfolk as a whole is restricted given that the level of growth experienced exceeds the Structure Plan requirements. The exception to this is affordable housing, which may be permitted as long as there is a clear and identifiable need, and the applicant enters into a legal agreement that ensures that the accommodation will be managed so as to meet genuine local need in perpetuity.

6.10 Many Councils are continuing to investigate potential options available. North Norfolk needs to be an active partner in contributing to the national debate regarding preserving local communities in high value environments. In the South West, particularly Cornwall, the affects of second homes/holiday homes on communities is being investigated. It is recommended that North Norfolk initiates dialogue with Council’s in similar predicaments elsewhere in the UK and is therefore involved in this process and review the viability of any sensible solutions that come forward.

Protection and Enhancement of the Environment

6.11 The protection and enhancement of the environmental qualities of North Norfolk are paramount in relation to the tourism sector, as the environmental characteristics, as defined in the zoning approach, provide the prime attractors and motivations behind a visitor to the District.

6.12 However, tourism activity and visitor behaviour can actually damage the very assets that form this appeal. Likewise, tourism development in unsuitable locations, coastal defence measures, and/or lack of investment in suitable landscaping can actually lead to a degradation of the environment from a visitor perspective.

6.13 In terms of the Heritage Coast (AONB) and the North Norfolk Broads (National Park) zones, measures and policies are already in place that aim to discourage and deter developments and behaviour that will have negative effects on the natural environment. These should be further supported and enhanced through the Local Development Framework.

6.14 In terms of the 'Resorts' zones, the key issue to be addressed is with regards to the retention and enhancement of the coastal beaches, vista's, and promenades that characterise this zone, and provide the key motivation for visitation. The Town Centre Revitalisation Programme for Cromer has certainly helped aid this process, but this needs to be viewed as an on-going commitment.

6.15 The major concern is in relation to the protection of the zone from coastal erosion, with the Resorts zone particularly exposed. The majority of tourism activity (bathing on beaches) and tourism plant (accommodation, shops, cafes, restaurants and bars) is concentrated within this zone, and thus the economic interaction of visitors is more keenly felt here.

6.16 According to the Shoreline Management Plan (2004), a significant proportion of the beach will be eroded within Cromer and Sheringham within the next 25-50 years, even with the implementation of the preferred plan which is to 'hold the existing line' within these resorts. Beyond 50 years, the beach may no longer be present at all. Erosion of the beaches would, therefore, effectively remove the main asset and appeal from this zone. It is beyond the scope of this study to review this in more detail, however the envisaged implications of beach erosion would be hugely significant from a tourism and economic perspective.

6.17 In the interim, it should also be recognised that the coastal defence measures need to be aesthetically in tune with the surrounding areas, with the landscaping of seawalls and other structures necessary to ensure the character and ambience of the resorts are retained. Poorly integrated defences can end up being a blight on the landscape, and therefore can pre-empt a decline in tourism fortunes.

Tourism Planning Policy

6.18 Overall, the current planning policy and guidance provided by North Norfolk District Council in its Local Plan are deemed to be effective in both encouraging appropriate development and discouraging inappropriate development of the tourism sector. The following section:

- Briefly describes the policies we feel are working effectively;

- Outlines the policies for tourism that could benefit from slight revisions.

Effective Policies

6.19 The planning policies that are deemed to be effective overall in encouraging/restricting tourism development includes:

- **Improvements to existing hotels** – policies relating to the improvement of existing hotels have generally supported applicants where sufficient consideration has been given to design and scale, though care should be taken in ensuring that improvements will be as aesthetically in tune with the surroundings as well as complimentary to the building itself.

- **New hotels** – applications have been limited, but when they have been submitted they are generally approved, possibly subject to revisions to ensure no harmful impacts. It is not felt that the planning policy is a particular deterrent to new applicants, but rather the relatively isolated location of the District is a more fundamental issue for developers.

- **New/improved tourist attractions** – the majority of applications regarding attractions have concerned the improvement of existing sites rather than focussing on new builds. In the majority of cases, the improvements were granted permission. Those who were refused permission were generally on the basis of potential conflicts with environmental concerns and/or the local community.

- **New Visitor Centres** – all proposals for visitor centres were approved, with officers observing the scale, design, visual impact and the potential affect that the centre would have on visitor pressure within the area.

Policies to be reviewed

6.20 The policies and guidance which we feel should be reviewed in light of the key issues identified in order to encourage appropriate development within the tourism sector are outlined as follows.

Restricting the loss of large-scale serviced accommodation

6.21 The review of planning applications has revealed a noticeable lack of policy specifically relating to the loss of serviced tourist accommodation, or which considers the impact of hotel closures to the wider community from either an economic or facility provision perspective. Despite supporting text in the Local Plan which identifies the economic benefits of hotels, and that they often comprise attractive and historic buildings, the majority of applications for the conversion of hotels have been approved in recent years. Although the total number of cases has not been particularly large, it is a significant trend nevertheless.

6.22 This issue needs to be addressed to arrest any further closures of larger scale operations, particularly in zones that have a low level of serviced bedspaces. Greater emphasis needs to be placed on the economic performance of the hotel as a business over time; and looking at the wider benefits of the establishment to the community as a whole.

6.23 It is recommended that a new policy is devised as part of the emerging LDF that can act as an appropriate valve for considering and controlling such losses, in step with Structure Plan and PPG advice, and in common with the existing Local Plan policy relating to the loss of un-serviced accommodation (Policy 128).

6.24 Such a policy could use an either / or test :

- Either there are sufficient* alternative levels of provision in the locality*
- or it can be demonstrated that the serviced accommodation is no longer economically viable
- and that the new use will not result in harm to amenities or interests of acknowledged importance.
- * Please note that the definition of sufficient and locality will both need consideration bearing in mind the context and merits of the case.

Conversions of existing buildings to holiday units

Defining Holiday Occupancy Conditions

6.25 It is noticeable that the current holiday occupancy conditions attached to approvals of holiday lets do not specify a maximum letting period for any one holiday, and that the Local Plan policies and supporting text does not currently explore this.

6.26 Whilst not regarded as an issue at present, the system is open to potential misuse in the future as there is no clear definition as what is deemed to be an acceptable ‘holiday’ period and thus where the cut-off is between holiday occupancy and permanent residence. This could become a problem if there is a downturn in tourism fortunes in the self-catering sector or amongst certain accommodation types such as chalets, with other districts having experienced some units being sold as private residencies despite having holiday occupancy conditions attached.

6.27 It is recommended that the current policy 127, relating to holiday occupancy and seasonal occupancy, is separated out into two distinct policies. This would give clarity to the discrete reasons and justifications for both, and give greater weight to the specific considerations relating to the control of holiday occupation.

6.28 Consideration should also be given to the wording of conditions being attached to new holiday accommodation in the open countryside, to prevent their use in a manner that is tantamount to a private dwelling. It is recommended that the use of conditions stipulating a maximum period of 8 weeks per individual let is set out in the policy supporting text and adopted as a standard condition by Development Control officers, in order to provide a measurable, enforceable and pragmatic approach to controlling holiday occupancy.

Market Justification

6.29 As conversions of existing buildings to holiday lets can be a costly and often not straightforward, we feel that it would be appropriate to require applicants to seek input from tourism organisations and local land agents about the respective marketability and conversion costs. This should form part of a pre-application exercise in order to establish whether there are prospects of a reasonable return from their investment.

6.30 Such evidence will also provide a more robust basis on which to defend the retention of holiday occupancy conditions, should their removal be sought later (and even if a building has not been made available for let for some time).

Adopting a balanced approach to the conversion of touring pitches to static units

6.31 Whilst Policy 123 provides some advice in regard to amendments to the layout of existing static sites, it is noted that a general trend has been for the replacement of touring pitches with static vans or chalet lodges.

6.32 Noting the comments in PPG21 about the need to strike a balance between the levels of provision for touring and static van visitors, and bearing in mind comments provided earlier about the value that touring sites provide (due to the different habits and spending patterns of tourers when visiting the area) it is suggested that a specific policy is devised in the emerging LDF that provides for consideration and control over this shift, with particular emphasis on the current capacity of the different zones identified.

New Attractions Development

6.33 The Council appears to have taken a stance against the potential for an ‘iconic’ attraction to be developed within the District.

6.34 However, the audit demonstrates that the District does lack an attraction that can generate visits on a mass level in its own right; and a family-based, child driven attraction. It is important to recognise the value that an attraction, which is of appropriate scale and development, could have for the prosperity of the tourism sector within the District which, at present, lacks a coherent attractions offer. Whilst an attraction of the magnitude of 'The Eden Project' is deemed unsuitable, there may be other schemes and proposals which arise for a project that is more in keeping with the offer of North Norfolk. As such, the Council should view any new attractions proposals on its own merits. In particular, it is recommended that attractions proposals be able to support their application by demonstrating:

- that the project has the ability to generate new visitors from specific markets rather than competing from the same visitor pool;
- that it will support and compliment the attractions sector, and fits with the current attractions themes; and
- that the design is in keeping/sympathetic to the nature and overall characteristics of immediate zone.

Tourism Development

6.35 From a more strategic perspective, North Norfolk District Council should seek to investigate opportunities for improving the tourism offer and product, with key recommendations outlined for:

- theming attractions;
- utilising visitor amenities and facilities;
- developing transport networks.

Theming the Attractions Sector

6.36 The individual attractions within North Norfolk are not considered to be strong in their own right in terms of awareness and their ability to attract visitors. A method that could help raise the profile of the attractions sector as a whole would be to theme the attractions, and include them within the profile of the wider northern section of Norfolk.

6.37 As an example, concentrating on an area that can be loosely defined as the 'northern reaches of Norfolk' - i.e. an arbitrary line that runs across the county above Norwich, King's Lynn and Great Yarmouth – it is possible to distinguish the following key attraction 'themes':

- Heritage railway – NNR Poppyline, Wells & Walsingham Railway, Barton House Railway (Broadland) and Bure Valley Railway (Broadland);

- Stately Houses/Estates – Holkham Hall & Estate, Blickling Hall, Wolterton Hall & Park, Felbrigg Hall and Sandringham Palace (West Norfolk), Houghton Hall (West Norfolk), Norwich Castle (Norwich);

- Gardens & Parks - Holkham Estate, East Ruston Old Vicarage, Hoveton Hall Gardens, Mannington Gardens, Priory Maze & Gardens, Sheringham Park & Gardens;

- Wildlife/Nature Reserves – Penthorpe Nature Reserve, Cley Marsh/Salthouse Marshes Visitor Centre, Blakeney Point, Hickling Broad, Barton Broad, Thursford Wood, Foxley Wood, Ringstead Down (West Norfolk), Holme Dunes (West Norfolk), Cockshoot Broad (Broadland), Ranworth Broad (The Broads), Upton Broad & Marshes (The Broads), Ebb & Flow Marshes (The Broads).

6.38 By combining the attractions in terms of the relevant themes and expanding the area of focus to include the northern reaches of Norfolk, the attractions sector arguably becomes stronger and helps to provide a more cohesive product that will have a heightened resonance with visitors.

6.39 Measures to promote these themes could manifest itself in a variety of forms, from simple mutual promotion to encourage like-minded visits across the range of attractions within the theme; to actual joint promotional campaigns, ticketing initiatives, and targeted marketing ventures to actually drive increased visits.

Utilising fully the visitor amenities and facilities in the overall visitor product

6.40 In terms of future development, the study process has revealed that opportunities may exist for enhancing the key visitor amenities and facilities to provide a more cohesive and co-ordinated aspect of the visitor product, namely:

- utilising Cromer Pier, particularly in the Resorts zone, as a the most recognisable landmark to greater effect in promotion and marketing;

- reviewing the potential to integrate walking, cycling and bridleway routes into a more complete network of sustainable routes that link key attractions and features of interest to the main accommodation centres;

- encouraging Public House operators to invest in and/or promote opportunities for combining walking, cycling, horse riding activities with a visit to a Pub for eating and drinking;

- developing a series of opportunities to encourage participation in the range of leisure activities available within North Norfolk;

- promoting places to eat and drink through guides of quality establishments; and

- encouraging the purchase, use and promotion of local produce, to help strengthen the local supply chain, with some form of mark being designed to promote participants as 'local produce champions'.

6.41 In conjunction with these developments, consideration also needs to be given to the availability of important visitor facilities such as public toilets (always high on visitor complaints about an area if they aren't present), car parking, and appropriate visitor information.

Developing Public Transport Networks

6.42 Particular opportunities for enhancing existing transport services that have the needs of visitors as part of their overall strategy include developing a more integrated public transport network that link rail and bus systems and services to provide seamless travel between key start and finish points, and in particular:

- establishing the feasibility of developing a route between Cromer and The Broads, built around the same ethos as the Norfolk Coast Hopper and The Broads Hopper;

- reviewing the potential demand and ease of use of a bike carrier buses on certain North Norfolk routes, such as the Norfolk Coast Hopper, similar to that already in operation within The Broads; and

- reviewing the feasibility of establishing a link between The Bittern Line and The NNR – Poppyline.

Tourism Management

6.43 The management of tourism is a key issue for all local authorities where tourism forms a major part of the local economy.

6.44 Tourism is officially a discretionary role of Councils. Too often, this discretion is viewed purely in terms of whether or not to apply a budget to the sector, irrespective of its contribution to the prosperity of the District. However, the discretion should be viewed as an opportunity for Council's to determine the role of tourism on the basis of its importance to the wider economic prosperity of the District and then invest in the sector accordingly.

6.45 This situation is slowly changing, but it has taken the foot and mouth disaster of 2001 to bring many local authorities alive to the dangers that a severe drop in tourism fortune can have on overall prosperity of the communities they are responsible to.

6.46 North Norfolk was one of the few districts whereby the tourism sector was not to severely affected by the foot and mouth outbreak. There are, however, other potential threats that could see a downturn in tourism prosperity, not least being increased competition from both overseas and domestic destinations which have a similar coastal offer; but more crucially in the long-term, the loss of beaches to erosion and degradation of the environmental assets. If these events are left to come to fruition unchecked, and given the high level of reliance on the coastal based tourism, the consequences for the tourism sector could be as devastating to North Norfolk as foot and mouth was to Tynedale for example, which lost 20% of the value of tourism over the year.

6.47 With the spend of overnight and day visitors underpinning a substantial number of jobs within the District, it is recommended that North Norfolk takes the opportunity presented by the Local Development Framework to consider its own management of tourism. In particular, we would recommend that the Council aim to achieve the requirements detailed for obtaining Beacon Status in Sustainable Tourism, namely to demonstrate:

- cross-cutting excellence in supporting a modern, evolving tourism industry;
- a sustainable tourism ‘management process’ that aims to cement tourism’s ongoing contribution to the economy and maximise the benefit to local communities;
- that a vision and strategy for tourism is developed and championed at the highest level;
- an effective Tourism or Visitor Management strategy which applies to all sectors of the industry, and which is considered in other relevant strategies;
- the collection and collation of effective data on tourism industry and business; and
- regular consultation with the industry and industry representatives, and other key stakeholders;

6.48 Key issues for the Council in achieving this aim will be to:

- positively engage the private sector, with a current perception amongst some consultees that there is a ‘them and us’ attitude towards tourism development;
- initiating positive working relationships within all District level and County level departments whose decisions will have an impact on tourism (toilet provision, car parking, road signage for example).
- initiating positive working relationships and regular/formal dialogue with neighbouring districts and organisations that have a responsibility for tourism (Norfolk Coast Partnership, The Broads Authority, West Norfolk and King’s Lynn).

- determining the role North Norfolk should have within the Norfolk Tourism Destination Management Zone, and in particular recognising the Districts important strategic role in promoting tourism across the County.