NORTH
NORFOLK
DISTRICT
COUNCIL

Sheringham and Dudgeon Extension Projects (EN010109)

DEADLINE 3 SUBMISSION

NORTH NORFOLK DISTRICT COUNCIL

02 MAY 2023

Table of Contents

1. Introduction

1.1. This document comprises the Deadline 3 Submission of NNDC for the SEP & DEP Project including additional information requested from NNDC by the ExA linked to Tourism and Recreation impacts and responses to the ExA second written questions (attached at **Appendix A** with NNDC responses highlighted in yellow).

2. Tourism, Recreation and Socio-Economics

2.1. During Issue Specific Hearing 4 (Agenda Item 6) NNDC set out concerns that the localised impacts associated with the on-shore construction phase of the SEP & DEP project had likely been underestimated by the Applicant. NNDC explained that there was little in the way of conclusive evidence from existing NSIP projects linked to impacts on tourism businesses.

2.2. The Applicant referred to a report by Biggar Economics Wind Farms and Tourism Trends in Scotland (July 2016). NNDC dispute the relevance of the Biggar Report and agreed to provide extracts of NNDC's observations to the Biggar Report from its Local Impact Report for Norfolk Boreas scheme. These are attached at **Appendix B** (see paragraphs 14.6 and 14.7).

2.3. NNDC suggest that the lack of available evidence does not mean that there will conclusively be no harm to tourism dependent businesses during the construction phases of NSIP windfarm schemes either individually or cumulatively. It is simply that, a lack of collated evidence. NNDC would welcome a commitment from Equinor to contribute towards further studies which will help establish conclusively the impact of offshore wind during the construction phase on tourism dependent businesses. This evidence will prove invaluable for future NSIP projects.

Appendix A – NNDC Response to ExA Second Written Questions

Q2.13. Habitats and Ecology Onshore			
Q2.13.1 Effects on Protected and Priority Species			**North Norfolk District Council Response**
Q2.13.1.1	Natural England	**Construction Sites and Compounds** a) Does the Applicant's comment on responses to the ExA's first written questions [REP2- 040, Q1.13.2.2] adequately identify the need for mitigation of effects from lighting and noise on bat species and their prey resulting from construction works in the vicinity of watercourses? b) Would the mitigation proposed reduce the potential effects on bat species and their prey to an acceptable level?	
Q2.13.1.2	Royal Society for the Protection of Birds	**Weybourne Cliffs** Question repeated for RSPB It is identified that populations of sand martins nest within the cliffs [APP-106]. Would noise and vibration from the landfall construction operations, with particular regard to vibrations from the HDD, have any effect upon the integrity of the cliffs or the living conditions of the sand martins such that nesting could be abandoned?	
Q2.13.1.3	Natural England	**Weybourne Cliffs** Does the Applicant's response [REP1-036, Q1.13.2.4] provide sufficient information to demonstrate that there are no effects predicted on the living conditions for sand martins in this location as a result of vibration related HDD activity? If not, please expand with further reasoning.	

Q2.13.1.4	South Norfolk District Council North Norfolk District Council	**Reptiles** Provide your response, or provide signposting which directs to your response during the Examination, indicating whether the Applicant's response [REP1-036, Q1.13.2.5] sets out the level of detail requested by SNDC [AS-034].	**The Applicant's response states the potential for translocation requirements only affects areas around the substation which lies within South Norfolk. Therefore, NNDC have no further comment regarding the requirement for reptile translocation details.**
Q2.13.2 Effects on Ancient Woodland, Trees and Hedgerows			
Q2.13.2.1	Applicant	**Wensum Woods**	

		Provide a response to NE's suggestion [REP1-138] that Wensum Woodlands may become a SSSI due its Barbastelle bat colony and whether this impacts upon the Proposed Development in any way?	
Q2.13.2.2	Interested Parties Local Authorities Applicant	**Ancient Woodland** a) Does the Applicant's response [REP1-036, Q1.13.3.1] provide sufficient clarity on their proposed approach to mitigation of possible impacts to Ancient Woodlands? b) Is the Applicant's proposed approach to mitigation of possible impacts on Ancient Woodlands satisfactory at this stage? c) If not, set out which adverse effects would require further mitigation.	**NNDC are satisfied adequate buffer zones will be afforded and embedded mitigation utilised to avoid and minimise potential impacts upon Ancient Woodlands and ancient/veteran trees. The information provided is deemed sufficient to protect the interests of Ancient Woodland and ancient/veteran trees in North Norfolk at this stage of the process.**
Q2.13.2.3	Applicant	**Moveable Hedgerows** Provide further comment on the Applicant's position relating to the use of 'bat fencing' as set out in SNDC's response to WQ1 [REP1-102, Q1.13.3.3]	
Q2.13.3 Effects on Rivers and River-Based Wildlife			
Q2.13.3.1	Mr Hay-Smith	**Chalk-based Streams** In your OFH oral representation [EV-074], [EV-075] you made reference to a self-funded community program, in collaboration with EA and Norfolk Rivers Trust, carried out at Spring Beck. Please provide further details of the works carried out to date and any further intended program of works for Spring Beck. In addition, please outline the risks to the chalk-based stream that you believe could result from the Proposed Development.	

Q2.13.3.2	Applicant Environment Agency	**Signal Crayfish** Clarify whether the Applicant's proposed procedures for minimising risk of transmission of both crayfish plague and transmission of signal crayfish between watercourses [REP1-036, Q1.13.4.4] is agreed. Submit an updated SoCG which includes the current agreed position on this topic.	

Q2.16. Land Use		
Q2.16.1 Effect on Agricultural Land and Businesses and Recreational Assets		
Q2.16.1.1	Applicant National Farmers Union	**Outline Management Plan for Agricultural Matters** Further to discussions at ISH3 [EV-036] [EV-041], both parties provide a joint update on discussions about whether there is a need for an outline management plan for agricultural matters to be linked to the OCoCP. Include details of any remaining disagreements.
Q2.16.1.2	Applicant	**Agri-environmental Schemes** The Applicant set out at ISH4 [EV-058] [EV-062] that it was willing to alter the wording of the dDCO to give 28 days notice where surveys or the construction works will impact on Agri-environment schemes. Provide a revised dDCO that includes this change.
Q2.16.1.3	Applicant	**Outline Landscape Management Plan** The Applicant's response [REP1-036, Q1.16.1.6] appears to accept that monitoring requirements for land use, agriculture and recreation are not set out explicitly in the OLMP. On this basis, provide a revised OLMP to include such requirements.
Q2.16.1.4	National Farmers Union	**Effect on Individual Businesses** The Applicant is of the view [REP1-036 Q1.16.1.8,] that it is not possible to meaningfully estimate of the amount of land in each holding or therefore the amount of land affected. What is the view of the NFU on this matter?
Q2.16.1.5	Applicant	**Abbey Farm and Home Farm, Weybourne** The operators of Abbey Farm and Home Farm, Weybourne [REP1-172] have raised concern that the Proposed Development would prevent access to the farm buildings and have a business critical impact on farming operations and both farm businesses. Applicant, explain how access would be maintained and how is this secured in the dDCO.
Q2.16.1.6	Applicant	**Reinstatement Best Practice** Mr Clive Hay-Smith, Mr Paul Middleton and Priory Holdings Limited [REP1-158, REP1-171, REP1-183] are concerned that NSIP EIA's routinely assume reinstatement best practice is followed but in practice they frequently are not and that due to compaction, disturbance of the soil structure, scarcity of top-soil at re-instatement and the proximity of buried infrastructure there is routinely a permanent reduction in soil fertility and productivity.

		Whilst noting the Applicant's reply to their WR's [REP2-017] please provide more detail on how such impacts will be mitigated.	
Q2.16.2 Soils and Soil handling, Ground Conditions, Contamination and Minerals			**North Norfolk District Council Response**
Q2.16.2.1	Applicant Local Authorities	**Soil Degradation Mitigation** Further to discussions at ISH4 [EV-058] [EV-062] in relation to a mechanism for securing thermal resistance mitigation measures to prevent soil overheating where needed: a) Applicant to consider where the best place is to secure such measures (such as dDCO, OPEMP and/or OCoCP). b) Applicant and LAs is there a need for such matters to be considered and signed off by the relevant LA?	**(a) N/A** **(b) NNDC do not hold the requisite expertise in-house on maters of soil quality linked to potential over-heating. There would therefore appear to be little benefit in requesting relevant authorities to sign-off on matters of detail. It would be more appropriate to ensure the key principles for preventing soil overheating or secured within key outline documents such as OCoCP.**
Q2.16.2.2	Applicant	**Contamination** The Applicant's response [REP1-036, Q1.16.2.5] sets out that *"Geophysical surveys at the airfield are ongoing and the initial results indicate that there are areas of rubble present which are likely to be associated with the construction of the airfield. Further surveys will help identify whether any contamination does exist onsite and if so next steps including micro-siting the cable and any remedial works".* Will the full results of such surveys be available during the Examination?	
Q2.16.2.3	Applicant	**Pre-construction Investigations and Control Measures for Contaminated Land** The Applicant's response [REP1-036, Q1.16.2.8] notes that pre-construction investigations and control measures for contaminated land are detailed in Section 4.1 of the OCoCP [REP1-023]. However, this	

		does not explicitly refer to the mitigation relied on in the ES for impacts on the built environment. To appropriately secure such mitigation should specific wording be added to the OCoCP?	

Q2.17.	**Landscape and Visual Effects**		
Q2.17.1 Effect on Landscape Character and Views			**North Norfolk District Council Response**
Q2.17.1.1	Local Authorities Interested Parties	**Scope of the ES and LVIA** Is the Applicant's approach to the assessment of sequential views within its LVIA [APP- 112], as described in its response to ExQ1 [REP1-036, Q1.17.1.6] reasonable and sufficient to demonstrate that effects on receptors in this context have properly assessed?	**NNDC is satisfied with the Applicant's approach to the assessment and conclusions of effects on sequential views within the LVIA (e.g. England Coast Path)**
Q2.17.1.2	Applicant	**Viewpoints along PRoWs** During ASI2 [EV-028] the ExA noted that there was the possibility to view both the Norwich Main substation and the proposed onshore substation from the PRoW network. Provide a further illustrative viewpoint which depicts the effects on receptors on the PRoW in this location. Provide a similar level of information as that provided for viewpoint 2 [APP-159].	
Q2.17.1.3	Local Authorities	**Residential Receptors** Question repeated for response from LAs The Applicant notes that a RVAA has not been undertaken because the nearest receptors would fall below the relevant threshold [APP-112, Paragraphs 117-120]. a) LAs, is this a reasonable approach? b) LAs, in your view what weight should be given to private views from residential properties? Make reference to relevant national and local policies in your response.	**(a) The applicant has followed guidance set out within the best practice standard GLVIA3 and Landscape Institute Technical Guidance Note 02/2019 and NNDC considers this to be a reasonable approach. The ExA refers to APP112, p. 117-120 which refers to the substation which is not in the jurisdiction of NNDC.** **(b) This refers to weight to be given to private views from residential properties. This is not relevant to the onshore cable route within the NNDC District.**

Q2.17.2 Effects on designated and historic landscapes, including Areas of Outstanding Natural Beauty and Ancient Woodlands			
Q2.17.2.1	The Countryside Charity Norfolk North Norfolk District Council Norfolk Wildlife Trust Norfolk Coast Partnership	**Areas of Outstanding Natural Beauty** Do you consider that the Proposed Development prejudices the special qualities of the affected AONB and, if so, state which ones and why conflict is considered to arise?	**NNDC considers that the onshore cable route will incur minor temporary effects during construction, and that the residual effects will be minimal. It is the off-shore element of the development that will impact the following special qualities of the AONB:** **<u>1. Sense of remoteness, tranquillity and wildness</u>** **This quality arises from the low level of development and population density in the area, resulting in dark night skies and a sense of wildness within the undeveloped coastal regions and habitats.** **The existing off-shore wind infrastructure has already eroded this quality to a degree. The proposed development with significantly taller turbines extending from the existing arrays will make the structures more readily apparent from the land, especially so at night due to lighting. That said, this quality will still be experienced, albeit to a slightly lesser degree.** **<u>2. Strong and distinctive links between land and sea</u>** **It is recognised that the area's distinctive character is derived from not only visual links between land and sea, but also ecological, socio-economic and functional connections. Rather than erode this quality, this development reinforces three of these links, as a means of adapting to climate change and current geo-political forces.** **<u>3. Diversity and integrity of landscape,</u>**

			seascape, and settlement character **The dynamic coastline of North Norfolk is integral to the ecology, land-use, economy and settlement of the area. Coastal adaptation in this low-lying area has long been an influencing factor and this development represents large scale adaptation in terms of renewable energy.**
Q2.17.3 Effectiveness of mitigation proposals			

Q2.17.3.1	Local Authorities Natural England National Trust Woodland Trust	**Removal of Existing Trees and Hedgerows, Replanting and Management** a) Are you satisfied that the Applicant's proposals for the removal, replanting and management of existing trees and hedgerows have been set out to a sufficient level of detail at this stage [REP1-036, Q1.17.1.11]? b) In particular, is the Applicant's approach to managing the likelihood of damage occurring to existing trees and hedgerows during the construction period sufficiently clear [REP1-036, Q1.17.1.11]?	**NNDC do not agree with the applicant's confirmation in response to REP-1, Q1.17.1.11 c) that the ratio of replacement tree and hedge planting will be 1:1, e.g. one new tree planted to replace a felled tree and 10m of hedgerow planted to replace 10m of hedgerow removed.** **The preference would be for replacement tree planting to be equal to the lost biomass of removed trees. However, NNDC consider that a 3:1 ratio would be proportionate and more feasible, whilst also contributing to the voluntary 10% BNG.** **With regard to hedgerows, NNDC considers that a 1.5 to 1 ratio (i.e. 15m of replacement hedgerow to replace 10m of removed hedgerow) would be proportionate, to account for establishment.**

Q2.17.3.2	Applicant	**Removal of Existing Trees and Hedgerows, Replanting and Management** Provide details of, or provide signposting to documents within the Examination which provide details of, the tree protection measures likely to be required during the detailed design and construction stages. Information should include, but may not be limited to: a) Requirements and information for pre-commencement operations and briefings; b) The roles and responsibilities associated with the delivery of the protection measures, control and communication associated with works affecting existing trees and hedgerows; c) Mitigation measures to be recorded, monitored and implemented; and d) Review and monitoring mechanisms that would be adopted. e) If not contained within a single document for reference, consider whether the Examination would be assisted by the collation of this information into one document. f) If this information is not currently within the Examination, provide reasoning which explains why it would not be possible for it be included this information in outline form before the close of the Examination.	
Q2.17.3.3	Applicant	**Removal of Existing Trees and Hedgerows, Replanting and Management** Set out how the information provided in response to Q2.17.3.2 above is secured within the dDCO	

Q2.17.3.4	Local Authorities Natural England National Trust Woodland Trust Interested Parties	**Tree and Hedgerow Replacement** Set out whether the Applicant's approach [APP-303] and as further clarified in its response to WQ1 [REP1-036, Q1.17.1.12] is a reasonable one at this stage of the Examination.	**NNDC do not agree with the applicant's confirmation in response to REP-1, Q1.17.1.11 c) that the ratio of replacement tree and hedge planting will be 1:1, e.g. one new tree planted to replace a felled tree and 10m of hedgerow planted to replace 10m of hedgerow removed.** **The preference would be for replacement tree planting to be equal to the lost biomass of removed trees. However, NNDC consider that a 3:1 ratio would be proportionate and more feasible, whilst also contributing to the voluntary 10% BNG.** **With regard to hedgerows, NNDC considers that a 1.5 to 1 ratio (i.e. 15m of replacement hedgerow to replace 10m of removed hedgerow) would be proportionate, to account for establishment.**

Q2.20. Noise and Vibration			
Q2.20.1 Adequacy of the Assessments for Construction			
Q2.20.1.1	Broadland District Council South Norfolk District Council	**Main Construction Compound** Further to discussions at ISH3 [EV-036] [EV-041], provide more evidence to support your views that operational noise guidelines (BS4142) should be used at the main compound rather than construction guidelines (BS5228-1) and that any potential noise complaints cannot be adequately dealt with by other means.	
Q2.20.2 Construction Effects on Sensitive Receptors			**North Norfolk District Council Response**
Q2.20.2.1	Local Authorities	**Vibration** The Applicant notes [REP1-036, Q1.20.1.5] that the assessment for both building damage [APP-109, Table 23-14] and human disturbance [APP-109, Table 23-16] are based on exceedance of a fixed limit (specified in peak particle velocity (PPV)) by one event (in this case, one HGV passby). Further, that the number of HGVs passing a property would therefore not affect the PPV experienced at a receptor in the way that it does for noise and hence, annoyance impacts due to vibration associated with construction traffic will be no worse than those due to noise. LA's are you content with this reply?	**NNDC have previously commented as follows in the Statement of Common Ground – at ID13** **"The impact of noise, road traffic noise and vibration have been assessed and receptors requiring further mitigation have been identified. Impacts during the construction phase are short term and potential suitable mitigation measures are highlighted."** **NNDC consider that vibration impacts from traffic on resident's amenity are closely linked to those for noise and as such these have been adequately assessed.** **Vibration due to road traffic is linked to poor road surface quality and as such NNDC would support the proactive inspection of the road surface for repair/works, prior to the construction programme, at selected road links where**

			potential noise and vibration impacts have been highlighted.
Q2.20.2.2	Applicant	**Construction Noise Management Plan** Following discussions at ISH3 [EV-036] [EV-041], provide examples of other OWF developments where significant noise effects had been identified and were dealt with in a CNMP that was provided post consent.	
Q2.20.2.3	Applicant	**HDD at Oulton** Further to discussions at ISH3 [EV-036] [EV-041], Applicant confirm, as a worst case scenario, whether the use of HDD under the solar farm at Oulton would result in the need for night time works/ drilling.	
Q2.20.3 Cumulative Effects Assessment			
		No further questions in this section as this stage.	

Deadline for responses is Deadline 3, Tuesday 2 May 2023

Q2.22. Socio-economics effects			
Q2.22.1 Effects on recreation, tourism and business			**North Norfolk District Council Response**
Q2.22.1.1	Applicant North Norfolk District Council	**Tourism Reports** Following discussions at ISH4 [EV-058] [EV-062], in relation to effects of the Proposed Development on tourism: a) NNDC submit the evidence supplied to Norfolk Boreas Examination with regards to effects on tourism and disputing the findings of the BIGGAR report. b) The Applicant to consider whether a contribution could be made towards tourism studies to assess the impacts of Offshore Wind developments on tourism and businesses in Norfolk.	**(a) Evidence Provided – See Extract from NNDC Local Impact Report for Norfolk Boreas (dated 10 Dec 2019). The ExA are directed towards paragraphs 14.6 and 14.7 in relation to NNDC position on the BIGGAR report.** **(b) NNDC would welcome the Applicant contributing to the development of evidence about the impact of NSIP offshore wind projects on tourism and businesses in Norfolk.**
Q2.22.1.2	Applicant Local Authorities	**Correlation with Local Planning Policies** NPS EN1 at Paragraph 5.12.4 sets out that applicants should refer to how the development's socio-economic impacts correlate with local planning policies. a) Applicant, confirm where this has been undertaken. b) LAs, please set out whether you consider the Proposed Development correlate with your local planning policies that relate to socio-economic matters.	**(a) N/A** **(b) NNDC consider that the Applicants has generally described the existing socio-economic conditions in the areas surrounding the proposed development and, in broad brush terms have referred to how the development's socio-economic impacts correlate with local planning policies. NNDC Core Strategy Policies do not specifically address the individual or cumulative socio-economic impacts of multiple development projects happening within a similar geographical area. Within the Spatial Strategy, Polices SS 5 considers the Economy with a focus on job creation in the tourism, retail and rural economy sectors. The Applicant's approach to assessing socio-economic impact is**

			generally focussed more at the higher level through assessing the net increase in jobs from construction and the operational and maintenance elements. **NNDC accept that, taken as a whole, the project will deliver economic benefits but these benefits will likely be derived for businesses away from the construction zones and come at some short-term costs to businesses affected by construction phases of individual and cumulative NSIP projects taking place in the area.**
Q2.22.2 Effects on jobs and skills			**North Norfolk District Council Response**
Q2.22.2.1	Applicant Local Authorities	**Outline Skills and Employment Plan** Following discussions at ISH4 [EV-058] [EV-062], provide an amended OSEP to include the additional measures proposed by the Applicant [REP1-036, Q1.22.2.8].	**NNDC will work with the Applicant, Norfolk County Council and other Relevant Authorities in producing an amended OSEP.**
Q2.22.2.2	Applicant	**Outline Skills and Employment Plan** Do the figures in the OSEP [APP-310, Paragraph 24] need to be updated, taking into account your response [REP1-036 Q1.22.1.7]?	
Q2.22.3 Effects on Individuals and Communities			
Q2.22.3.1	Applicant	**Impact on Bed Spaces** As discussed at ISH4 [EV-058] [EV-062], provide further qualitative evidence regarding bed spaces in terms of price points. Further, revisit the cumulative bed space availability	

		assessment given that this did not include the delayed A47 Tuddenham to Easton highway improvement scheme.
Q2.22.4 Inter-related Effects on Human Health and Community Well-being		
		No further questions in this section as this stage.

Appendix B – Extracts from NNDC Local Impact Report for Norfolk Boreas dated 10 Dec 2019 in relation to 'Biggar' Report

Norfolk Boreas Offshore Wind Farm

LOCAL IMPACT REPORT

NORTH NORFOLK DISTRICT COUNCIL
(INTERESTED PARTY REF: 20022969)

10 DEC 2019

Table of Contents

14. Tourism, Recreation and Socio-Economics

14.1. NNDC notes the information contained within Chapter 30 of the ES [APP-243]. During the examination of the Norfolk Vanguard NSIP, NNDC made numerous submissions concerning the impact of the proposed windfarm construction activities on tourism within North Norfolk, arising from direct impacts and from the impacts of negative perceptions caused by awareness of the construction activity taking place. NNDC have concerns that the impact of the project on tourism is again being downplayed by the Applicant. Because of the high level of dependence of the North Norfolk economy on tourism (£511m total tourism value, 11,461 jobs (29% of total employment) in 2018) any impact upon that sector will have a disproportionately high impact upon the overall economy of the District. (Source: Economic Impact of Tourism – North Norfolk 2018 produced by Destination Research/Sergi Jarques – Copy attached at **Appendix G** and 2017 report attached at **Appendix H**).

14.2. In respect of the baseline environment set out in ES Chapter 30 NNDC would challenge the assumption set out at paragraph 259 that *'Outside of The Norfolk Coast AONB, the countryside of North Norfolk and Breckland is not regarded as a direct draw for tourism although it is well regarded by local recreational users and an intrinsic aspect of the visitor's experience'*.

14.3. Due to high quality landscapes and the existence of many important heritage assets, tourism benefits are not just limited to areas within the Norfolk Coast AONB or coastal resorts. Many popular cycle and walking routes are located outside of the AONB.

14.4. In respect of the ES assessment findings, NNDC consider that the onshore cable route goes through some attractive and sensitive parts of North Norfolk District, especially between Happisburgh and North Walsham and this area is attractive to tourists throughout the year and host to visitor accommodation, facilities and some attractions including walking and cycling.

14.5. In this regard, whilst NNDC believes the long-term impacts of the cable route on the tourism economy will be benign, the Council has very significant concerns that during the cable corridor construction phase there will be serious impacts on local tourism businesses such that the construction works will have a substantial impact on the income of tourism businesses in the Happisburgh to North Walsham area, which needs greater recognition by Vattenfall.

14.6. During the Norfolk Vanguard examination, NNDC made representations in its Deadline 3 submission in respect of the report by Biggar Economics *Wind Farms and Tourism Trends in Scotland* (July 2016) referred to by the Appellant within ES Chapter 30.

14.7. NNDC invited the Examining Authority to place little weight on this report, for the following three reasons:

- The focus of the report, and the research it cites in section 3, concerns <u>onshore</u> wind farms, not on the construction impacts of large offshore wind farms. Indeed, "construction impacts" are not considered at all;
- The report and the underlying research on which it was based concerned <u>visual impact</u> of onshore turbines or wind farms, not disruption impact experienced during the construction period of very large offshore projects;
- The report concerns Scotland and examines the relationship "between the development of onshore wind energy and the sustainable tourism sector in Scotland" (pg 1). "Sustainable tourism" has a definition specific to Scotland, which is referenced but not set out in footnote 4 on pg 6. It is therefore not relevant to general tourism impact in North Norfolk.

14.8. Within its Deadline 3 submission for Norfolk Vanguard, NNDC also included a report by Destination Research entitled *Economic Impacts of Tourism 2017.*

This showed the value of the tourism economy to NNDC and that seasonality is levelling out. A copy of this report is attached at **Appendix H**. The 2018 report by Destination Research entitled *Economic Impacts of Tourism* has also been published which shows an increase in total tourism value, an increase in the number of tourism jobs and an increase in the percentage of tourism jobs as a percentage of total employment. A copy is attached at **Appendix G**.

14.9. At Deadline 4 of the Norfolk Vanguard examination NNDC expressed concern within the Norfolk Vanguard Statement of Common Ground that:

> ‘The applicant does not appear to recognise…[the]…potential impact on small tourism businesses nor has an appropriate mitigation strategy been proposed. Whilst the impact on local tourism may not be considered ‘significant’ at a regional level, at a local level the impacts have the potential to be lasting and, in some cases could be permanent if businesses are forced to close due to loss of trade attributable to the impact of construction activities affecting tourism draw, no matter how well managed or controlled. The applicant needs to go further to identify mitigation to help tourism (and related) businesses adversely affected by construction activities including how smaller businesses can be compensated so as to avoid their permanent loss/closure’.

14.10. NNDC considered that addressing the impacts on tourism and related businesses needed to be included within the DCO Requirements and, at Norfolk Vanguard Deadline 6, put forward wording for a new Requirement concerning Tourism and Associated Business.

14.11. Following this the Applicant and NNDC met to discuss potential tourism impacts and agreed that they would undertake further work together with a view to formulating some sensible joint actions for assuaging the concerns of local tourism-reliant businesses. NNDC welcomed and supported this collaborative approach.

14.12. By Deadline 7 of the Norfolk Vanguard examination, there remained a substantive disagreement between the parties – the Applicant disagreed that there will be significant local tourism impacts within NNDC's boundaries and emphasised that the construction time within the area will be short. What was considered to be missing in the Applicant's analysis is the perception impact, which is different from the Applicant's fine and precise understanding of the construction process. NNDC's position is that short-term impacts do not necessarily translate into short-term perception of tourists about where they will visit and stay. Evidence attached in **Appendix I** shows perception impact on tourism which NNDC has experienced in other comparable circumstances (this evidence was also provided to the Norfolk Vanguard examination.

14.13. As a result, NNDC's view remained that the Applicant has, in the ES and its later analysis, underestimated the significance of the impact on tourism. Accordingly, in order to make the development acceptable in planning terms, a requirement mitigating tourism impact was considered necessary.

14.14. Such a requirement is supported in policy terms. The Overarching National Policy Statement for Energy (EN-1) requires applicants to assess relevant socio-economic impacts, including effects on tourism (§5.12.3). NNDC's Core Strategy sets out the importance of tourism to the economy of North Norfolk: see §§2.7.19. The Core Strategy also acknowledges that "the main tourism appeal in North Norfolk is based on the unique natural environmental assets", so "it is important to protect these". Accordingly, policy SS5 on the economy provides that the tourism industry will be supported and that proposals should not have a detrimental environmental impact which in turn might negatively impact tourism.

14.15. NNDC has, since its Norfolk Vanguard Local Impact Report, challenged the Applicant's assumption that the countryside of North Norfolk is not a direct draw for tourism, outside of the Norfolk Coats AONB. The onshore cable route goes through attractive and sensitive parts of North Norfolk district, especially between Happisburgh and North Walsham. Figure 7 in the Core Strategy, entitled "Tourism Asset Zones" (pg 96), identifies Happisburgh as a "coastal service village" asset, and §3.4.28 identifies North Walsham as part of a "rural" asset zone.

14.16. The NPPF also recognises the importance of tourism to rural economies (such as North Norfolk) and paragraph 83 requires that decisions should enable "sustainable rural tourism" which "respects the character of the countryside". Plainly for this policy to achieve its aim, it requires both positive support for rural tourism businesses and, more relevant for present purposes, it requires mitigation of potential negative impacts from non-tourism development on sustainable rural tourism.

14.17. NNDC in its Norfolk Vanguard Deadline 6 submissions proposed the text of a draft requirement. The Applicant challenged the appropriateness and necessity of the requirement based on the ES. As set out above, the ES does not adequately address the tourism impact. If the Examining Authority accepts that the Applicant has underestimated this impact and accepts that there is the potential for substantial negative impact on tourism, then in order for permission to be granted that impact must either be mitigated by a requirement, or the Examining Authority must set out how the benefits of the proposal outweigh the negative impacts on tourism. In NNDC's submission, the Applicant has not provided any evidence that such a balancing exercise favours making the DCO despite the negative impacts on tourism. NNDC's evidence all points to the need for a requirement to be imposed.

14.18. As a matter of principle, a negatively worded requirement can require a mitigation strategy that envisages payment by the Applicant of a contribution to address an impact – see paragraph 005 of the PPG on the Use of Planning Conditions ("**the Conditions PPG**"). Furthermore, paragraph 011 of the Conditions PPG states that, where a condition or a section 106 agreement could be used to overcome a planning objection to a development, then a condition should preferably be imposed.

14.19. The requirement proposed by NNDC at Norfolk Vanguard Deadline 6 envisaged a mitigation scheme which addresses tourism impact in two ways:

- Via the payment of a contribution out of which compensation can be awarded to local tourism and associated businesses impacted by the development; and
- Via marketing activity to combat negative perception and to assist with generating tourist footfall and spend.

14.20. The Appellant in discussions raised concerns about the practicality of linking the payment of the contribution to compensation to local tourism and associated business. Although NNDC considers that such a scheme could be workable, it recognises the need for the Applicant to be confident in what is being proposed. Accordingly, NNDC suggested a different destination for the payment of the contribution: it could be paid to existing Tourism Information Centres and to Visit North Norfolk and/or Visit Norfolk, both organisations with which NNDC works closely. **Appendix J** provides further information about Visit North Norfolk (including the pages on areas relevant to the DCO and the “About” page of the organisation) and **Appendix K** provides further information about Visit Norfolk. Appendix K and L were provided to the Examining Authority for Norfolk Vanguard

14.21. NNDC therefore proposes the following amended wording to the draft DCO requirement:

Tourism and Associated Businesses

X.- (1) No part of Works No. 4C or Work No. 5 within the District of North Norfolk may commence until such time as a tourism and associated business impact mitigation strategy has been submitted to and approved in writing by NNDC.

(2) The tourism and associated business impact mitigation strategy referred to in sub-paragraph (1) must include:

(a) Details of a contribution to be paid by the undertaker to Tourism Information Centres, Visit North Norfolk, Visit Norfolk and any other relevant organisations supporting and promoting tourism in North Norfolk;

(b) Details of a method by which the contribution by the undertaker in (a) will be apportioned to the above organisations;

(c) Details of who will administer the strategy;

(d) Details of how the strategy will be funded including the cost of administration;

(e) Details of how any monies unspent are to be returned to the undertaker;

(f) Details of marketing campaigns (including funding) to be run in order to market North Norfolk in advance of, during and after construction works have been completed for Norfolk Vanguard for the purpose of generating tourist footfall and spend.

(3) The tourism and associated business impact mitigation strategy must be implemented as approved.

14.22. The payment of a contribution to improve and support tourism services like information centres or such as Visit North Norfolk and payment of a contribution to develop and run a targeted marketing campaign are well-trodden ways of mitigating negative impacts of development on tourism. A mitigation strategy incorporating these measures would be reasonable and enforceable, and the detailed scheme would be precise. Accordingly, the proposed requirement would meet all the tests in paragraph 55 of the NPPF and paragraph 3 of the Conditions PPG.

14.23. NNDC welcomed the subsequent Norfolk Vanguard Examining Authority schedule of changes to the draft Development Consent Order (Issued 09 May 2019) and the proposed inclusion of new Requirement 34 (tourism and associated business impact mitigation strategy) which address concerns raised by NNDC at Deadline 7. A copy of Requirement 34 set out by the Norfolk Vanguard ExA is attached at **Appendix L**.

Evidence of Perception Impact

14.24. At Norfolk Vanguard Deadline 8, the Appellant provided a Position Statement on NNDC's Request to Address Perceived Tourism Impacts [REP8-071]. This document challenged the evidence provided by NNDC at Deadline 7 concerning the tourism impact of negative perceptions in relation to particular areas. The Applicant also made submissions concerning the lawfulness of the proposed tourism requirement.

14.25. It should be noted that in these submissions the Applicant's use of "perceived tourism impact" is a misnomer – it is not the tourism impact that is "perceived". The impact arises from negative perceptions. A better description would be "Actual Tourism Impact of Negative Perceptions".

14.26. In essence, the Applicant challenged NNDC's Norfolk Vanguard Deadline 7 evidence, provided by NNDC's specialist officer with significant experience of tourism matters in general and tourism in NNDC in particular, on the basis that it would have been preferable to address the perception impact from the construction of the Dudgeon Offshore Wind Farm (onshore construction 2015/2016) and the Sheringham Shoal Offshore Wind Farm (onshore construction 2010/2011). The Applicant asserted, based on the statistics from NNDC's Norfolk Vanguard Deadline 6 evidence showing overall growth in tourism over the period 2013-2017, that there was no adverse perception impact on tourism as a result of the construction of the other off-shore windfarms.

14.27. NNDC considered that the Applicant's approach belied its lack of expertise in assessing tourism impact. The statistics at §17 of the Applicant's Position Paper were district-wide statistics. In other words, they were at a macro level, not a micro level. They did not show anything about tourism impact in the particular areas where Dudgeon and Sheringham Shoal made landfall and where construction took place. They certainly did not undermine NNDC's evidence concerning coastal erosion perception impacts, which was based on micro-level impact at particular places when perception of those areas changed. NNDC's choice of comparator was the correct choice.

14.28. Furthermore, the overall district-wide levels of tourism are contingent on a wide number of factors, including the weather and the exchange rate, which again showed why those statistics cannot be assumed to show a lack of tourism impact from the Dudgeon or Sheringham Shoal schemes.

14.29. The Applicant also relied on the approach taken by the Hornsea 3 Examining Authority. NNDC did not, during that examination, propose the type of Requirement now under consideration in relation to the Norfolk Vanguard project. NNDC therefore wrote to the Hornsea 3 Examining Authority and the Secretary of State, bringing their attention to the approach of the Norfolk Vanguard Examining Authority and inviting them to take a similar approach.

Lawfulness of the Proposed Requirement

14.30. The Applicant contested the lawfulness of the proposed requirement on two bases. The first is that it is not necessary or directly related to the proposed development because the tourism impact from negative perception has not been evidenced, relying again on the fact that tourism “steadily increased” following the onshore construction periods of the last two offshore wind farms (§§22-23). For the reasons given above, this was a misunderstanding of what the tourism statistics show. NNDC relies on its evidence, provided at both Norfolk Vanguard Deadline 6 and Deadline 7, that the proposed requirement was necessary and directly related to the development.

14.31. The second basis on which the Applicant contested the lawfulness of the proposed requirement is that it will not be fairly and reasonably related in kind and scale to the development because there is no “mechanism”, either in policy or currently agreed with the Applicant, to assess the requisite level of financial contribution.

14.32. However, there is nothing in the case law concerning conditions, or in the PPG, that suggests a requirement for financial contributions will fail the test if there is no mechanism in an SPD or similar policy document for its calculation. The proposed requirement envisages the Applicant producing a mitigation strategy for submission and approval by NNDC. That will ensure that NNDC and the Applicant agree suitable figures for the requisite contributions. As

NNDC submitted at Norfolk Vanguard Deadline 7, this is a well-trodden way of mitigating negative impacts of development on tourism. A mitigation strategy incorporating these measures would be reasonable and enforceable, and the detailed scheme would be precise. Accordingly, the proposed requirement would meet all the tests in paragraph 55 of the NPPF and paragraph 3 of the Conditions PPG.

14.33. NNDC's position in light of what is set out above is that the Norfolk Boreas DCO should include a requirement for a tourism and associated business impact mitigation strategy to address the likely adverse impacts on the tourism sector within North Norfolk.

Appendix G - Economic Impact of Tourism – North Norfolk 2018 produced by Destination Research/Sergi Jarques

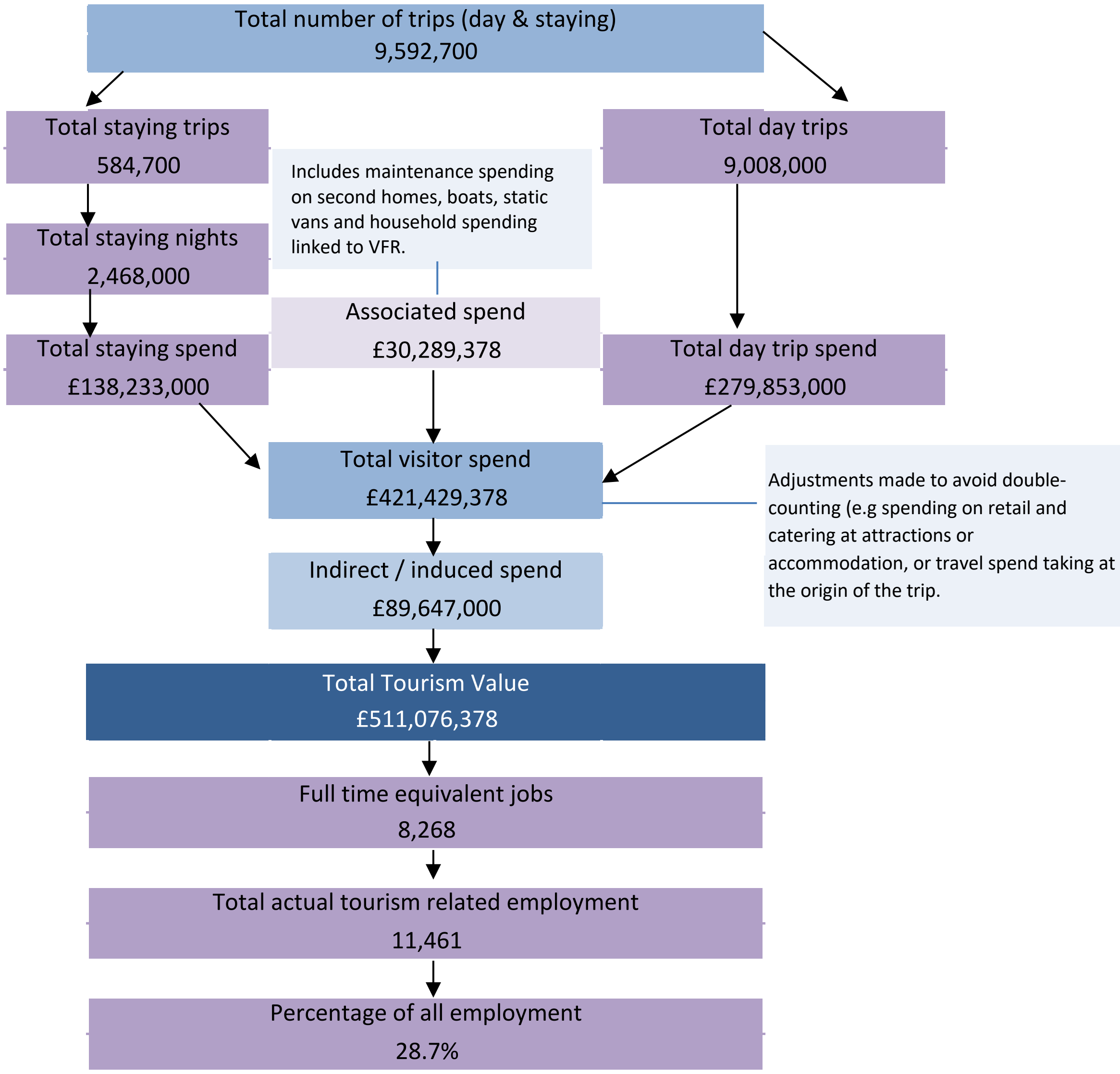
destinationresearch
delivering results : measuring what matters

Economic Impact of Tourism

North Norfolk - 2018

Contents	Page

Economic Impact of Tourism – Headline Figures North Norfolk - 2018

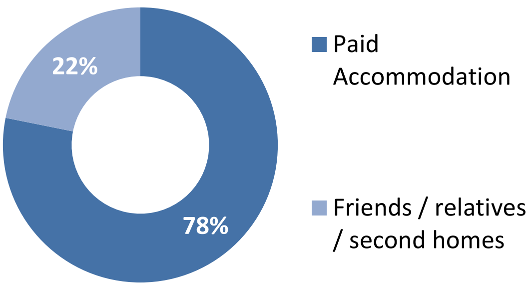


Economic Impact of Tourism – Year on year comparisons

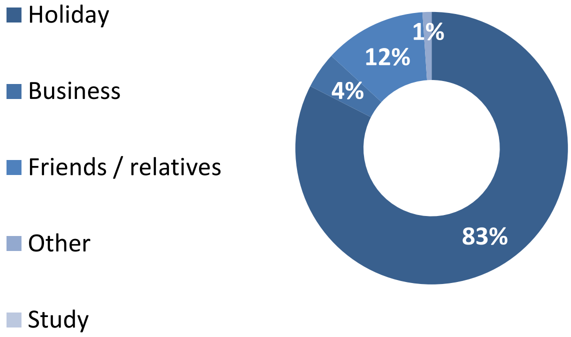
Day Trips	2017	2018	Annual variation
Day trips Volume	8,207,000	9,008,000	10%
Day trips Value	£268,710,000	£279,853,000	4%
Overnight trips			
Number of trip	620,700	584,700	-6%
Number of nights	2,644,000	2,468,000	-7%
Trip value	£145,523,000	£138,233,000	-5%
Total Value	**£505,109,250**	**£511,076,378**	**1%**
Actual Jobs	**11,352**	**11,461**	**1%**

	2017	2018	Variation
Average length stay (nights x trip)	4.26	4.22	-0.9%
Spend x overnight trip	£ 234.34	£ 236.30	0.8%
Spend x night	£ 55.04	£ 56.01	1.8%
Spend x day trip	£ 32.74	£ 31.07	-5.1%

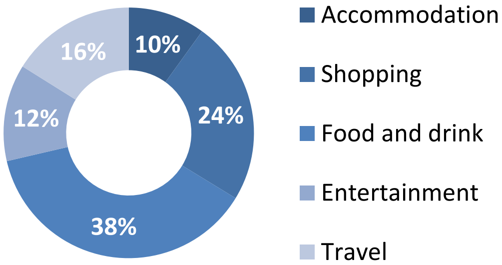
Type of Accommodation



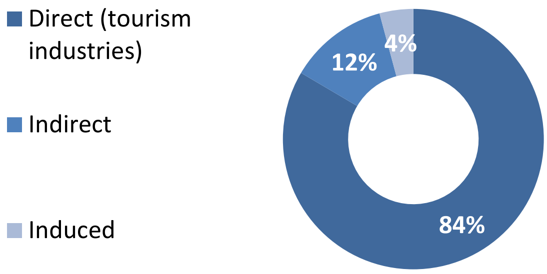
Trips by Purpose



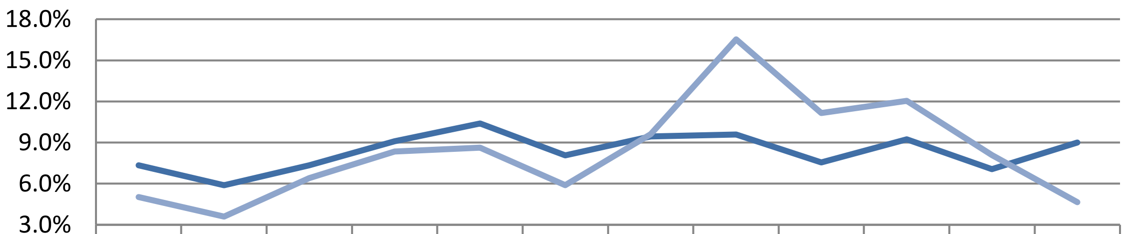
Breakdown of expenditure



Type of employment

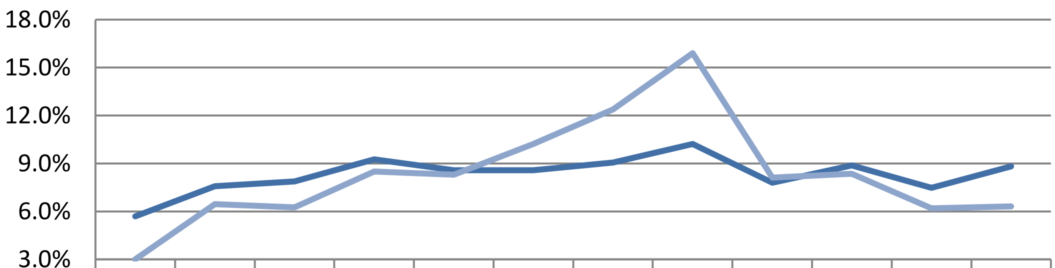


Seasonality - Day visitors (East of England)



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	7.3%	5.9%	7.3%	9.1%	10.4%	8.1%	9.4%	9.6%	7.6%	9.2%	7.0%	9.0%
Day spend	5.0%	3.6%	6.4%	8.4%	8.6%	5.9%	9.6%	16.5%	11.2%	12.0%	8.1%	4.7%

Seasonality - Overnight visitors (East of England)



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	5.7%	7.6%	7.9%	9.3%	8.6%	8.6%	9.1%	10.2%	7.8%	8.9%	7.5%	8.8%
Overnight spend	3.0%	6.4%	6.3%	8.5%	8.3%	10.2%	12.4%	15.9%	8.1%	8.4%	6.2%	6.3%

Contextual analysis

INTRODUCTION

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2018 and provides comparative data against previously published data. The results are derived using the Cambridge Economic Impact Model under licence by Destination Research Ltd based on the latest data from national tourism surveys and regionally/locally based data.

CONTEXTUAL ANALYSIS

The three key surveys used to measure volume and expenditure from tourism trips are the GB Tourism Survey (for domestic overnight trips), the International Passenger Survey (IPS) for visits from overseas, and the BG Day Visitor Survey (GBDVS), which measures tourism day visits.

Domestic tourism

National Performance

In 2018, British residents took 97.4 million overnight trips in England, totalling 296 million nights away from home and expenditure of £19 billion, with an average trip length of 3 nights. The number of domestic trips to England was 3% lower than in 2017. Holiday Trips in England in 2018 decreased by 4% compared to 2017, with 45.2 million trips recorded.

Regional performance

The East of England region experienced a 12% drop in overnight trips during 2018. Bednights were down by 14% on 2017 and expenditure was also down by 8%. However, these results are on the back of a positive 2017 when the region experienced a 3% increase in overnight trips on the previous year. Bednights were up by 13% on 2016 and expenditure was also up by 13%.

The average spend per night in 2018 was £55.97 (up from £52.5 in 2017) and the spend per trip was £179.51 (up from £172.58 in 2017). The region received less visitors in 2018 than in the previous year. But importantly, their length of stay was unchanged from 2017 and spent more money during their visit, compared average expenditure levels in 2017.

The GB Tourism Survey data is a key driver for the Cambridge model. However, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends. As such, county and district level results relating to 2018 are an average of 2016, 2017 and 2018.

Visits from overseas

National Performance

The number of visits in 2018 fell 3% (from the 2017 record) to 37.9 million, after several years of growth since 2010. The value of spending also decreased by 7% (compared to 2017) to £22.90 billion. Average spend per visit was £604 in 2018, down from £625 per visit in 2017. The number of visitor nights spent in the UK fell by 7% in 2018 to 266 million, with the average number of nights per visit declining to 7.0 (from 7.3 in 2017).

Regional performance

The number of Overseas trips to the East of England in 2018 was down 9% at 2.2 million overnight trips (2.4 million in 2017). The total number of nights was down by 14% to 13.9 million. Spend was down by 13.6% to £704 million in 2018 (£815.2 million in 2017).

The International Passenger Survey (IPS) data is a key driver for the Cambridge model. However, as with the GBTS, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends.

Tourism Day Visits

National Performance

During 2017, UK residents took a total of 1,703 million Tourism Day Visits (down from 1,793 in 2017). Around £63.8 billion was spent during these trips, about 2.2% up on 2017.

The largest proportion of visits were taken to destinations in England (1,431 million visits or 84% of the total). The distribution of expenditure during visits broadly reflects this pattern, with a total value of day trips to England totalling £53.04 billion (83% of the total for GB).

Regional performance

During 2018, the volume tourism day visits in the East of England increased by 3.5% to 137.4 million. Spend was also up by 31% to £5.04 billion.

The Day Visitor Suvey (GBDVS) data is a key driver for the Cambridge model. However, as with the GBTS and IPS, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends.

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	89,000	16%	1,600	6%	90,600	15%
Self catering	98,000	18%	3,800	14%	101,800	17%
Camping	68,000	12%	1,400	5%	69,400	12%
Static caravans	111,000	20%	600	2%	111,600	19%
Group/campus	32,000	6%	4,100	15%	36,100	6%
Paying guest	0	0%	0	0%	0	0%
Second homes	32,000	6%	1,400	5%	33,400	6%
Boat moorings	18,000	3%	0	0%	18,000	3%
Other	17,000	3%	1,200	4%	18,200	3%
Friends & relatives	94,000	17%	12,600	47%	106,600	18%
Total 2018	**558,000**		**27,000**		**585,000**	
Comparison 2017	**592,000**		**29,000**		**621,000**	
Difference	**-6%**		**-7%**		**-6%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	242,000	11%	7,000	3%	249,000	10%
Self catering	363,000	16%	79,000	30%	442,000	18%
Camping	319,000	14%	6,000	2%	325,000	13%
Static caravans	577,000	26%	2,000	1%	579,000	23%
Group/campus	78,000	4%	71,000	27%	149,000	6%
Paying guest	0	0%	0	0%	0	0%
Second homes	132,000	6%	8,000	3%	140,000	6%
Boat moorings	82,000	4%	0	0%	82,000	3%
Other	102,000	5%	3,000	1%	105,000	4%
Friends & relatives	312,000	14%	86,000	33%	398,000	16%
Total 2018	**2,208,000**		**260,000**		**2,468,000**	
Comparison 2017	**2,348,000**		**296,000**		**2,644,000**	
Difference	**-6%**		**-12%**		**-7%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£24,895,000	20%	£604,000	4%	£25,499,000	18%
Self catering	£24,774,000	20%	£4,980,000	33%	£29,754,000	22%
Camping	£22,083,000	18%	£296,000	2%	£22,379,000	16%
Static caravans	£26,802,000	22%	£170,000	1%	£26,972,000	20%
Group/campus	£5,203,000	4%	£4,051,000	27%	£9,254,000	7%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£2,876,000	2%	£729,000	5%	£3,605,000	3%
Boat moorings	£3,108,000	3%	£0	0%	£3,108,000	2%
Other	£5,449,000	4%	£157,000	1%	£5,606,000	4%
Friends & relatives	£8,093,000	7%	£3,965,000	27%	£12,058,000	9%
Total 2018	**£123,283,000**		**£14,950,000**		**£138,233,000**	
Comparison 2017	**£128,362,000**		**£17,161,000**		**£145,523,000**	
Difference	**-4%**		**-13%**		**-5%**	

Serviced accommodation includes hotels, guesthouses, inns, B&B and serviced farmhouse accommodation. Paying guest refers to overseas visitors staying in private houses, primarily language school students. Other trips includes nights spent in transit, in lorry cabs and other temporary accommodation.

Staying Visitors - Purpose of Trip

Trips by Purpose

		UK		Overseas		Total	
Holiday		471,000	84%	12,300	46%	483,300	83%
Business		24,000	4%	1,300	5%	25,300	4%
Friends & relatives		59,000	11%	11,800	44%	70,800	12%
Other		5,000	1%	1,300	5%	6,300	1%
Study		0	0%	0	0%	0	0%
Total	**2018**	**558,000**		**26,700**		**584,700**	
Comparison	**2017**	**592,000**		**28,700**		**620,700**	
Difference		**-6%**		**-7%**		**-6%**	

Nights by Purpose

		UK		Overseas		Total	
Holiday		1,882,000	85%	101,000	39%	1,983,000	80%
Business		75,000	3%	10,000	4%	85,000	3%
Friends & relatives		237,000	11%	138,000	53%	375,000	15%
Other		14,000	1%	12,000	5%	26,000	1%
Study		0	0%	0	0%	0	0%
Total	**2018**	**2,208,000**		**260,000**		**2,468,000**	
Comparison	**2017**	**2,348,000**		**296,000**		**2,644,000**	
Difference		**-6%**		**-12%**		**-7%**	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£107,487,000	87%	£7,064,000	47%	£114,551,000	83%
Business		£6,418,000	5%	£732,000	5%	£7,150,000	5%
Friends & relatives		£8,083,000	7%	£6,396,000	43%	£14,479,000	10%
Other		£1,295,000	1%	£758,000	5%	£2,053,000	1%
Study		£0	0%	£0	0%	£0	0%
Total	**2018**	**£123,283,000**		**£14,950,000**		**£138,233,000**	
Comparison	**2017**	**£128,362,000**		**£17,161,000**		**£145,523,000**	
Difference		**-4%**		**-13%**		**-5%**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

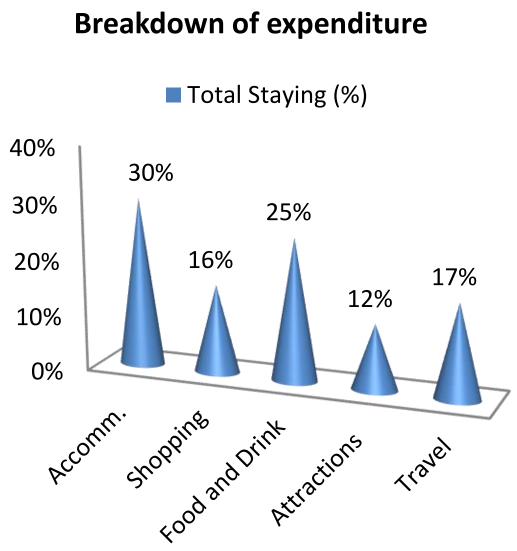
		Trips	Spend
Urban visits		3,302,000	£118,421,000
Countryside visits		3,489,000	£103,036,000
Coastal visits		2,217,000	£58,396,000
Total	**2018**	**9,008,000**	**£279,853,000**
Comparison	**2017**	**8,207,000**	**£268,710,000**
Difference		**10%**	**4%**

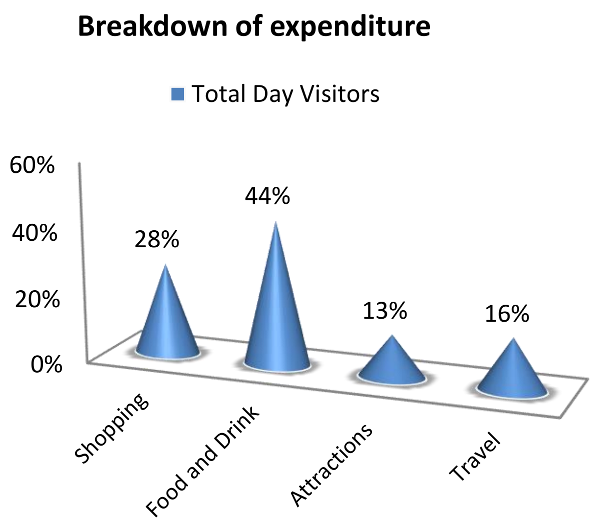
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£37,664,000	£17,368,000	£31,711,000	£14,683,000	£21,858,000	£123,284,000
Overseas tourists		£3,994,000	£4,430,000	£3,495,000	£1,497,000	£1,535,000	£14,951,000
Total Staying		£41,658,000	£21,798,000	£35,206,000	£16,180,000	£23,393,000	£138,235,000
Total Staying (%)		30%	16%	25%	12%	17%	100%
Total Day Visitors		£0	£77,538,000	£122,202,000	£36,139,000	£43,974,000	£279,853,000
Total Day Visitors		0%	28%	44%	13%	16%	100%
Total	**2018**	**£41,658,000**	**£99,336,000**	**£157,408,000**	**£52,319,000**	**£67,367,000**	**£418,088,000**
%		**10%**	**24%**	**38%**	**13%**	**16%**	**100%**
Comparison	**2017**	**£44,166,000**	**£97,465,000**	**£154,364,000**	**£51,869,000**	**£66,368,000**	**£414,232,000**
Difference		**-6%**	**2%**	**2%**	**1%**	**2%**	**1%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£10,071,000	£768,930	£4,204,448	£15,245,000	£30,289,378

Spend on second homes is assumed to be an average of £2,100 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,100 on berthing charges, servicing and maintenance and upgrading of equipment. Static van spend arises in the case of vans purchased by the owner and used as a second home. Expenditure is incurred in site fees, utility charges and other spending and is estimated at £2,100. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £185 per visit has been assumed based on national research for social

Direct Turnover Derived From Trip Expenditure

Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending.

	Staying Visitor	Day Visitors	Total
Accommodation	£42,362,000	£2,444,000	£44,806,000
Retail	£21,580,000	£76,763,000	£98,343,000
Catering	£34,149,000	£118,536,000	£152,685,000
Attractions	£16,749,000	£38,137,000	£54,886,000
Transport	£14,036,000	£26,384,000	£40,420,000
Non-trip spend	£30,289,378	£0	£30,289,378
Total Direct 2018	**£159,165,378**	**£262,264,000**	**£421,429,378**
Comparison 2017	**£163,905,250**	**£251,781,000**	**£415,686,250**
Difference	**-3%**	**4%**	**1%**

Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Supplier and Income Induced Turnover

	Staying Visitor	Day Visitors	Total
Indirect spend	£24,318,000	£36,565,000	£60,883,000
Non trip spending	£6,058,000	£0	£6,058,000
Income induced	£17,532,000	£5,174,000	£22,706,000
Total 2018	**£47,908,000**	**£41,739,000**	**£89,647,000**
Comparison 2017	**£49,318,000**	**£40,105,000**	**£89,423,000**
Difference	**-3%**	**4%**	**0%**

Income induced spending arises from expenditure by employees whose jobs are supported by tourism spend.

Total Local Business Turnover Supported by Tourism Activity – Value of Tourism

	Staying Visitor	Day Visitors	Total
Direct	£159,165,378	£262,264,000	£421,429,378
Indirect	£47,908,000	£41,739,000	£89,647,000
Total Value 2018	**£207,073,378**	**£304,003,000**	**£511,076,378**
Comparison 2017	**£213,223,250**	**£291,886,000**	**£505,109,250**
Difference	**-3%**	**4%**	**1%**

Employment

Employment

The model generates estimates of full time equivalent jobs based on visitor spending. The total number of 'actual' jobs will be higher when part time and seasonal working is taken into account. Conversion of full time equivalent jobs into actual jobs relies on information from business surveys in the sectors receiving

Direct employment

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Accommodation		853	32%	49	1%	902	14%
Retailing		217	8%	771	20%	988	15%
Catering		626	23%	2,172	55%	2,798	42%
Entertainment		321	12%	732	19%	1,053	16%
Transport		106	4%	199	5%	305	5%
Non-trip spend		561	21%	0	0%	561	8%
Total FTE	**2018**	**2,684**		**3,923**		**6,607**	
Comparison	**2017**	**2,759**		**3,768**		**6,528**	
Difference		**-3%**		**4%**		**1%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Accommodation		1,263	34%	73	1%	1,336	14%
Retailing		325	9%	1,156	20%	1,482	15%
Catering		939	25%	3,258	56%	4,197	44%
Entertainment		453	12%	1,032	18%	1,485	16%
Transport		149	4%	281	5%	430	4%
Non-trip spend		639	17%	0	0%	639	7%
Total Actual	**2018**	**3,769**		**5,800**		**9,569**	
Comparison	**2017**	**3,894**		**5,571**		**9,465**	
Difference		**-3%**		**4%**		**1%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	Day Visitors	Total
Indirect jobs		563	677	1,240
Induced jobs		325	96	420
Total FTE	**2018**	**887**	**773**	**1,660**
Comparison	**2017**	**913**	**743**	**1,656**
Difference		**-3%**	**4%**	**0%**

Estimated actual jobs				
		Staying Visitor	Day Visitors	Total
Indirect jobs		641	772	1,413
Induced jobs		370	109	479
Total Actual	**2018**	**1,011**	**881**	**1,893**
Comparison	**2017**	**1,041**	**847**	**1,888**
Difference		**-3%**	**4%**	**0%**

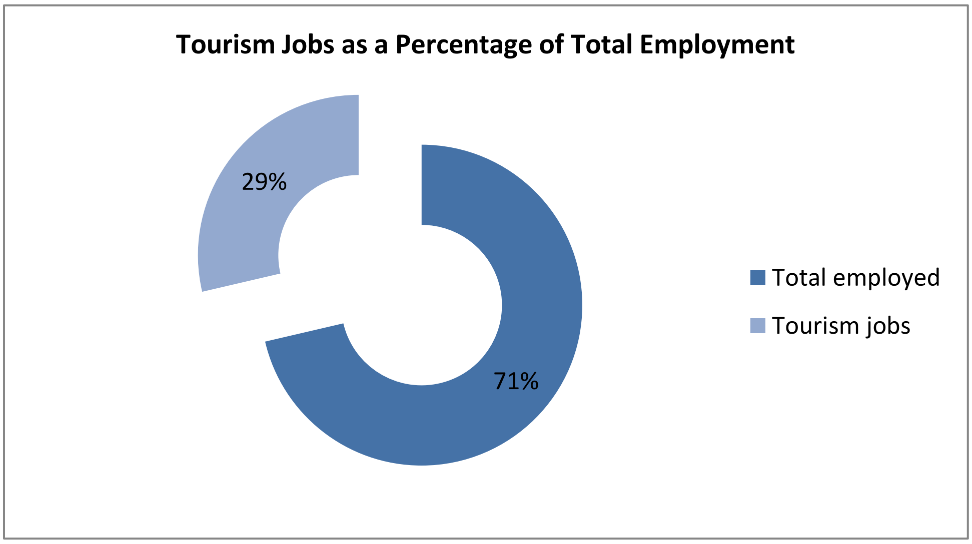
Total Jobs

Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitor		**Day Visitor**		**Total**	
Direct		2,684	75%	3,923	84%	6,607	80%
Indirect		563	16%	677	14%	1,240	15%
Induced		325	9%	96	2%	420	5%
Total FTE	**2018**	**3,571**		**4,696**		**8,268**	
Comparison	**2017**	**3,673**		**4,511**		**8,184**	
Difference		**-3%**		**4%**		**1%**	
Estimated actual jobs							
		Staying Visitor		**Day Visitor**		**Total**	
Direct		3,769	79%	5,800	87%	9,569	83%
Indirect		641	13%	772	12%	1,413	12%
Induced		370	8%	109	2%	479	4%
Total Actual	**2018**	**4,780**		**6,681**		**11,461**	
Comparison	**2017**	**4,935**		**6,417**		**11,352**	
Difference		**-3%**		**4%**		**1%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day visitors	Total
Total employed		40,000	40,000	40,000
Tourism jobs		4,780	6,681	11,461
Proportion all jobs		**12%**	**17%**	**29%**
Comparison	**2017**	**4,935**	**6,417**	**11,352**
Difference		**-3%**	**4%**	**1%**



Appendix I - Introduction about Cambridge Model

This report examines the volume and value of tourism and the impact of that expenditure on the local economy. The figures were derived using the Cambridge Economic Impact Model and the research was undertaken by Destination Research.

The model utilises information from national tourism surveys and regionally based data held by Destination Research. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

Limitations of the Model

The methodology and accuracy of the above sources vary. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. It is important to note that in the national tourism surveys the sample sizes for each area changes year on year. This is as a result of the random probability nature of the methodology. As such, the results of the Cambridge Model are best viewed as a snapshot in time and we would caution against year-on-year comparisons.

It should be noted that the model cannot take into account any leakage of expenditure from tourists taking day trips out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas, in locations receiving significant numbers of day visitors from London, there is likely to be an underestimate in relation to the number of overseas day visitors staying in holiday accommodation in London.

Whilst it is important to be aware of these issues, we are confident that the estimates we have produced are as reliable as is practically possible within the constraints of the information available.

Rounding

All figures used in this report have been rounded. Therefore, in some tables there may be a slight discrepancy between totals and sub totals.

Data sources

The main national surveys used as data sources in stage one include:

- Great Britain Tourism Survey (GBTS) - information on tourism activity by GB residents;
- International Passenger Survey (IPS) information on overseas visitors to the United Kingdom;
- Day Visits in the annual Great Britain Day Visitor Survey using information on visits lasting more than 3 hours and taken on an irregular basis

These surveys provide information down to a regional level. In order to disaggregate data to a local level the following information sources are used:

- Records of known local accommodation stock held by Destination Research;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Mid- 2018 estimates of resident population as based on the 2011 Census of Population;
- Selected data from the 2011 Census of Employment;
- Selected data on the countryside and coast including, national designations and length of the coastline.

Staying Visitors

The GBTS provides information on the total number of trips to the region and the relative proportions using different types of accommodation. By matching these figures to the supply of such accommodation, the regional average number of trips per bedspace or unit of accommodation can be derived. The IPS provides information on the total number of trips by overseas visitors to the region. The model uses three year rolling averages to reduce extreme highs and lows which are due to small sample sizes, rather than being a reflection on drastic changes in demand year-on-year.

Day Visitors

Information on day trips at the regional level is available from the Day Visits in Great Britain survey. The survey includes all leisure-related trips from home. It should be noted that a large proportion are local trips made by people resident in the locality. The model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

Impact of tourism expenditure

This section examines the impact of the tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of the actual jobs (both direct and indirect) supported by tourism expenditure in the district.

The GBTS, IPS and Day Visits to Great Britain survey data on the breakdown of visitor spending. The impact of this initial round of expenditure will be subsequently increased by multiplier effects. These arise from the purchase of supplies and services by the businesses in receipt of visitor expenditure (indirect impacts), and by the income induced-effects arising from the spending of wages by employees in the first round of business and in subsequent expenditure in supplier business (induced impacts).

The New Earnings Survey which provides information on wage levels by industry sector and region; An internal business database which includes data on the structure of business expenditure, local linkages and multiplier ratios drawn from a wide range of business and economic studies carried out by Geoff Broom Associates, PA Cambridge Economic Consultants and others. By applying the breakdown to the estimates of visitor spending, the model generates estimates of total direct spending.

Evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover – for example, some expenditure on food and drink actually takes place in inns and hotels that fall in the accommodation sector and within attractions. More significantly, expenditure on travel costs associated with individual trips is equally likely to take place at the origin of the trip as the destination. Therefore the model assumes that only 40% of travel expenditure accrues to the destination area.

Number of full time job equivalents

Having identified the value of turnover generated by visitor spending, it is possible to estimate the employment associated with that spending. Wages for staff and drawings for the proprietors will absorb a proportion of that turnover. By applying these proportions to the overall additional turnover in each sector, the amount of money absorbed by employment costs can be calculated. The New Earnings Survey provides data from which the average costs by business sector, adjusted to take account of regional differences, can be calculated.

After allowing for additional costs such as National Insurance and pension costs, an average employment cost per full time equivalent job can be estimated. The number of such jobs in the local area can then be estimated by dividing the amount of business expenditure on wages and drawings by the average employment cost per job.

Number of Actual Jobs

The model generates estimates of full time equivalent jobs based on visitor spending. However, the total number of actual jobs will be higher when part time and seasonal working is taken into account. The full time equivalent jobs arising directly from visitor spending are converted into actual jobs using information from business surveys in the sectors receiving visitor spending (principally accommodation, food and drink, retail, attractions, transport). In general, the conversion factor between full time equivalent jobs and actual jobs varies around 1.5 in those sectors.

The indirect and induced jobs arise across a much wider range of employment sectors. Therefore, the average 1.16 for all sectors based on Census of Employment data has been used to convert full time equivalent jobs in this sector to actual jobs.

The employment estimates generated by the model include both self-employed and employed people supported by visitor expenditure. The model also includes an estimate of the additional jobs arising in the attractions sector, which are not related to visitor expenditure. However, the numbers do not include other tourism-related employment such as jobs in local authorities arising from their tourism functions, e.g. tourist information staff, additional public health, parks and gardens, public conveniences, maintenance sections and jobs arising from capital investment in tourism facilities.

Produced by:

destination**research**
delivering results : measuring what matters

Registered in England No. 9096970
VAT Registration No. GB 192 3576 85

45 Colchester Road
Manningtree
CO11 2BA

Sergi Jarques
Director
Tel: 01206 392528
[redacted]

Appendix H - Economic Impact of Tourism – North Norfolk 2017 produced by Destination Research/Sergi Jarques

Economic Impact of Tourism

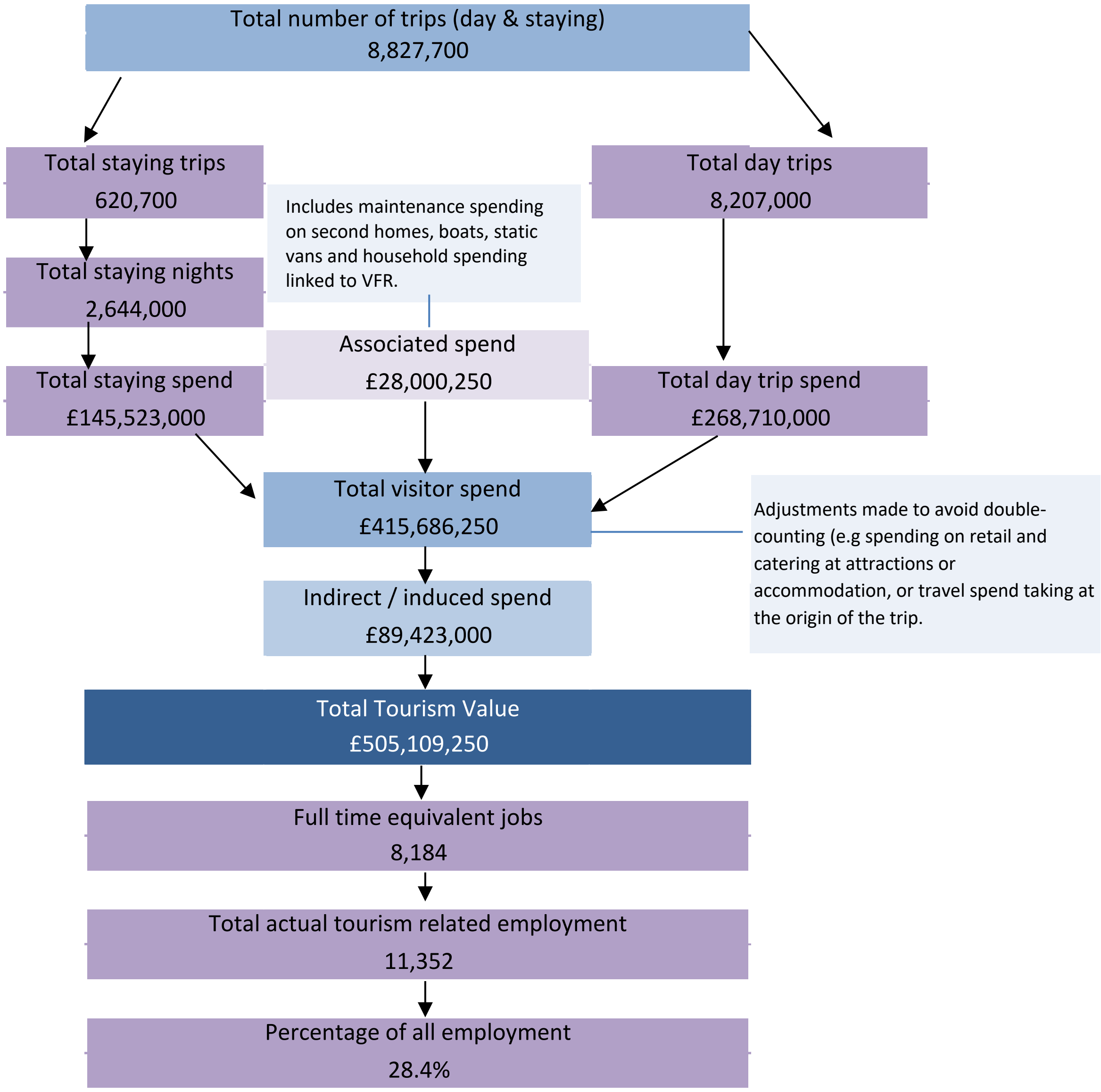
North Norfolk - 2017

Produced by:

Destination Research
Sergi Jarques, Director

Contents **Page**

Economic Impact of Tourism – Headline Figures North Norfolk - 2017

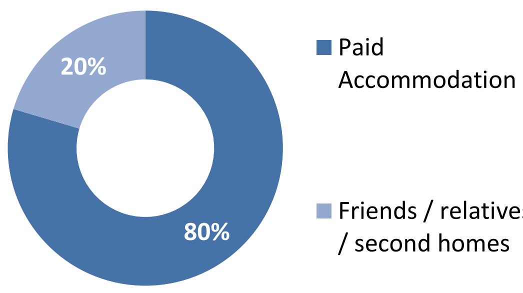


Economic Impact of Tourism – Year on year comparisons

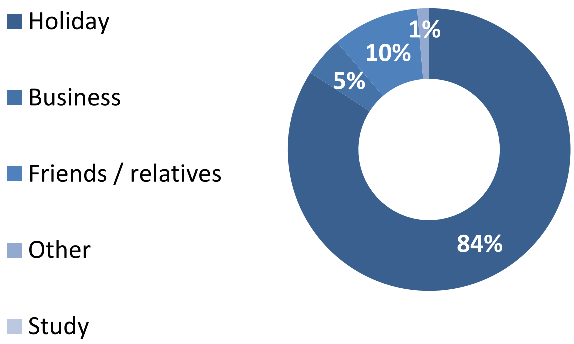
Day Trips	2016	2017	Annual variation
Day trips Volume	7,755,000	8,207,000	5.8%
Day trips Value	£261,055,000	£268,710,000	2.9%
Overnight trips			
Number of trip	553,500	620,700	12.1%
Number of nights	2,415,000	2,644,000	9.5%
Trip value	£141,018,000	£145,523,000	3.2%
Total Value	£490,357,250	£505,109,250	3.0%
Actual Jobs	11,020	11,352	3.0%

	2016	2017	Variation
Average length stay (nights x trip)	4.36	4.26	-2.3%
Spend x overnight trip	£ 254.55	£ 234.34	-7.9%
Spend x night	£ 58.39	£ 55.04	-5.7%
Spend x day trip	£ 33.66	£ 32.74	-2.7%

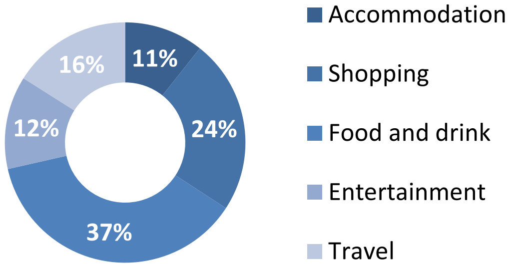
Type of Accommodation



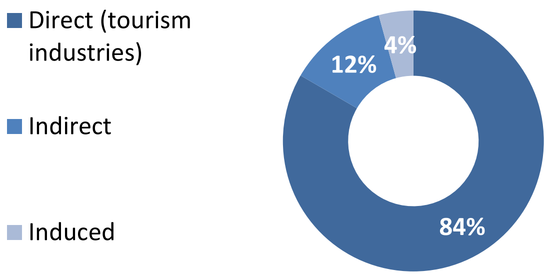
Trips by Purpose



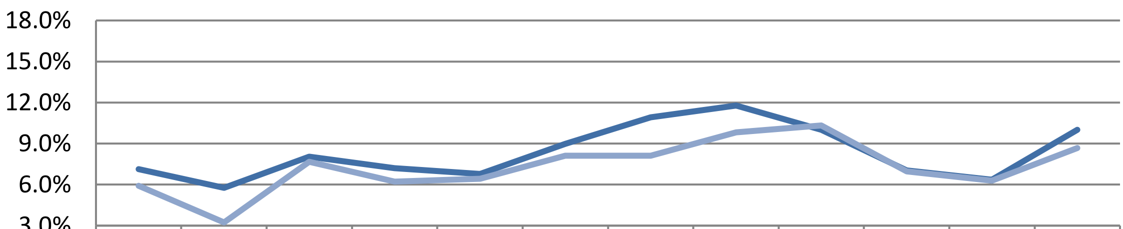
Breakdown of expenditure



Type of employment

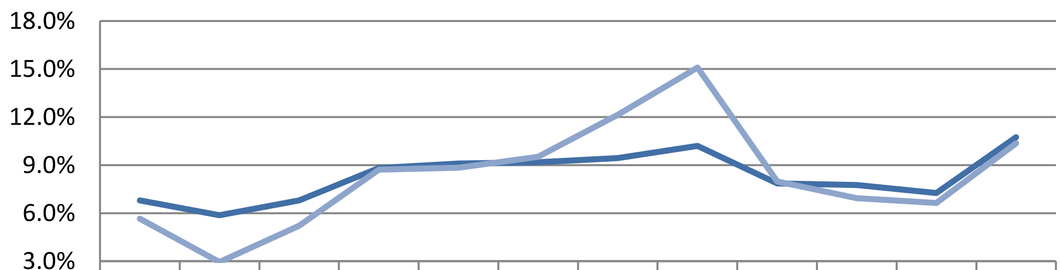


Seasonality - Day visitors



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	7.1%	5.8%	8.1%	7.2%	6.8%	9.0%	10.9%	11.8%	10.0%	7.0%	6.4%	10.0%
Day spend	5.9%	3.2%	7.7%	6.2%	6.4%	8.1%	8.1%	9.8%	10.3%	7.0%	6.3%	8.7%

Seasonality - Overnight visitors



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	6.8%	5.9%	6.8%	8.8%	9.1%	9.2%	9.4%	10.2%	7.8%	7.8%	7.3%	10.7%
Overnight spend	5.6%	2.9%	5.2%	8.7%	8.8%	9.5%	12.1%	15.1%	8.0%	6.9%	6.6%	10.4%

Contextual analysis

INTRODUCTION

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2017 and provides comparative data against previously published data. The results are derived using the Cambridge Economic Impact Model under licence by Destination Research Ltd based on the latest data from national tourism surveys and regionally/locally based data.

CONTEXTUAL ANALYSIS

The three key surveys used to measure volume and expenditure from tourism trips are the GB Tourism Survey (for domestic overnight trips), the International Passenger Survey (IPS) for visits from overseas, and the BG Day Visitor Survey (GBDVS), which measures tourism day visits.

Domestic tourism

National Performance

In 2017, British residents took 104.2 million overnight trips in England, totalling 299 million nights away from home. The number of domestic trips was 5% higher than in 2016, and nights were up by 4% compared to the 2016. Holiday Trips in England in 2017 increased by 9% compared to 2016, with 48.9 million trips recorded.

Regional performance

The East of England region experienced a 3% increase in overnight trips during 2017. Bednights were up by 13% on 2016 and expenditure was also up by 13%. This resulted in an increase in the average length of trips (the number of night per trip) from 3 nights per trip in 2016 to 3.3 in 2017.

The average spend per night was unchanged at £52.5 and the spend per trip was up from £159.53 in 2016 to £175.54 in 2017. The region received more visitors in 2017 than in the previous year. But importantly, they stayed for longer, which resulted in an average greater expenditure levels per trip.

The GB Tourism Survey data is a key driver for the Cambridge model. However, it is not specifically designed to produce highly accurate results at regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends.

Visits from overseas

National Performance

The number of visits in 2017 grew 4% to a record 39.2 million, after several years of growth since 2010. The number of visitor nights spent in the UK increased by 3% in 2017 to 286 million, with the average number of nights per visit declined slightly from 7.4 in 2016 to 7.3 in 2017. The value of spending increased by 9% to £24.5 billion. Average spend per visit was £7625 in 2017, up from £599 per visit in 2016.

Regional performance

The number of Overseas trips to the East of England in 2017 was unchanged at 2.4 million overnight trips. The total number of nights was down by 2% to 16.1 million. Spend was down by 4.5% to £815 million in 2017.

The International Passenger Survey (IPS) data is a key driver for the Cambridge model. However, as with the GBTS, it is not specifically designed to produce highly accurate results at regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends.

Tourism Day Visits

National Performance

During 2017, GB residents took a total of 1,793 million Tourism Day Visits to destinations in England, Scotland or Wales, 2% down on 2016. Around £62.4 billion was spent during these trips, about 2.4% down on 2016.

The largest proportion of visits were taken to destinations in England (1,505 million visits or 84% of the total). The distribution of expenditure during visits broadly reflects this pattern, with a total value of day trips to England totalling £50.9 billion (81.5% of the total for GB).

Regional performance

During 2016, the volume tourism day visits in the East of England decreased by 5% to 133 million. However, spend was up by 10% to £3.85 billion).

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	94,000	16%	1,800	6%	95,800	15%
Self catering	112,000	19%	4,100	14%	116,100	19%
Camping	71,000	12%	1,500	5%	72,500	12%
Static caravans	119,000	20%	600	2%	119,600	19%
Group/campus	34,000	6%	4,500	16%	38,500	6%
Paying guest	0	0%	0	0%	0	0%
Second homes	37,000	6%	1,500	5%	38,500	6%
Boat moorings	17,000	3%	0	0%	17,000	3%
Other	17,000	3%	1,300	4%	18,300	3%
Friends & relatives	92,000	16%	13,500	47%	105,500	17%
Total 2017	**592,000**		**29,000**		**621,000**	
Comparison 2016	**525,000**		**29,000**		**554,000**	
Difference	**13%**		**0%**		**12%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	258,000	11%	8,000	3%	266,000	10%
Self catering	386,000	16%	84,000	28%	470,000	18%
Camping	340,000	14%	7,000	2%	347,000	13%
Static caravans	614,000	26%	2,000	1%	616,000	23%
Group/campus	84,000	4%	84,000	28%	168,000	6%
Paying guest	0	0%	0	0%	0	0%
Second homes	140,000	6%	8,000	3%	148,000	6%
Boat moorings	87,000	4%	0	0%	87,000	3%
Other	109,000	5%	3,000	1%	112,000	4%
Friends & relatives	332,000	14%	100,000	34%	432,000	16%
Total 2017	**2,348,000**		**296,000**		**2,644,000**	
Comparison 2016	**2,100,000**		**315,000**		**2,415,000**	
Difference	**12%**		**-6%**		**9%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£25,350,000	20%	£710,000	4%	£26,060,000	18%
Self catering	£25,581,000	20%	£5,590,000	33%	£31,171,000	21%
Camping	£19,358,000	15%	£336,000	2%	£19,694,000	14%
Static caravans	£27,416,000	21%	£196,000	1%	£27,612,000	19%
Group/campus	£5,914,000	5%	£4,732,000	28%	£10,646,000	7%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£4,081,000	3%	£821,000	5%	£4,902,000	3%
Boat moorings	£6,101,000	5%	£0	0%	£6,101,000	4%
Other	£6,022,000	5%	£183,000	1%	£6,205,000	4%
Friends & relatives	£8,538,000	7%	£4,592,000	27%	£13,130,000	9%
Total 2017	**£128,362,000**		**£17,161,000**		**£145,523,000**	
Comparison 2016	**£123,066,000**		**£17,952,000**		**£141,018,000**	
Difference	**4%**		**-4%**		**3%**	

Serviced accommodation includes hotels, guesthouses, inns, B&B and serviced farmhouse accommodation. Paying guest refers to overseas visitors staying in private houses, primarily language school students. Other trips includes nights spent in transit, in lorry cabs and other temporary accommodation.

Staying Visitors - Purpose of Trip

Trips by Purpose

		UK		Overseas		Total	
Holiday		509,000	86%	13,200	46%	522,200	84%
Business		27,000	5%	1,400	5%	28,400	5%
Friends & relatives		49,000	8%	12,700	44%	61,700	10%
Other		7,000	1%	1,400	5%	8,400	1%
Study		0	0%	0	0%	0	0%
Total	**2017**	**592,000**		**28,700**		**620,700**	
Comparison	**2016**	**525,000**		**28,500**		**553,500**	
Difference		**13%**		**1%**		**12%**	

Nights by Purpose

		UK		Overseas		Total	
Holiday		2,039,000	87%	115,000	39%	2,154,000	81%
Business		77,000	3%	11,000	4%	88,000	3%
Friends & relatives		216,000	9%	157,000	53%	373,000	14%
Other		16,000	1%	13,000	4%	29,000	1%
Study		0	0%	0	0%	0	0%
Total	**2017**	**2,348,000**		**296,000**		**2,644,000**	
Comparison	**2016**	**2,100,000**		**315,000**		**2,415,000**	
Difference		**12%**		**-6%**		**9%**	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£117,351,000	91%	£8,108,000	47%	£125,459,000	86%
Business		£4,749,000	4%	£841,000	5%	£5,590,000	4%
Friends & relatives		£5,049,000	4%	£7,342,000	43%	£12,391,000	9%
Other		£1,214,000	1%	£870,000	5%	£2,084,000	1%
Study		£0	0%	£0	0%	£0	0%
Total	**2017**	**£128,362,000**		**£17,161,000**		**£145,523,000**	
Comparison	**2016**	**£123,066,000**		**£17,952,000**		**£141,018,000**	
Difference		**4%**		**-4%**		**3%**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

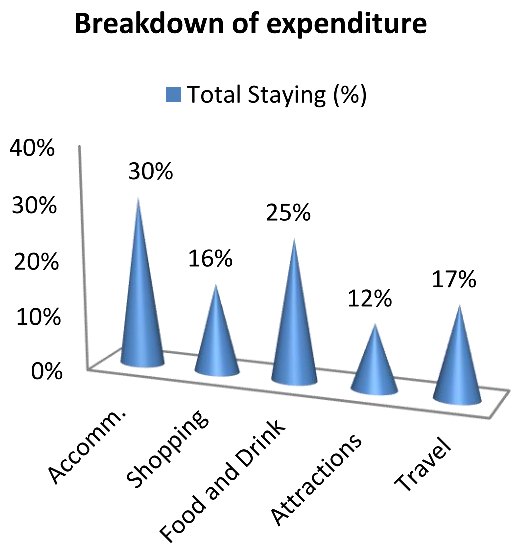
		Trips	Spend
Urban visits		2,979,000	£112,692,000
Countryside visits		3,201,000	£99,707,000
Coastal visits		2,027,000	£56,311,000
Total	**2017**	**8,207,000**	**£268,710,000**
Comparison	**2016**	**7,755,000**	**£261,055,000**
Difference		**6%**	**3%**

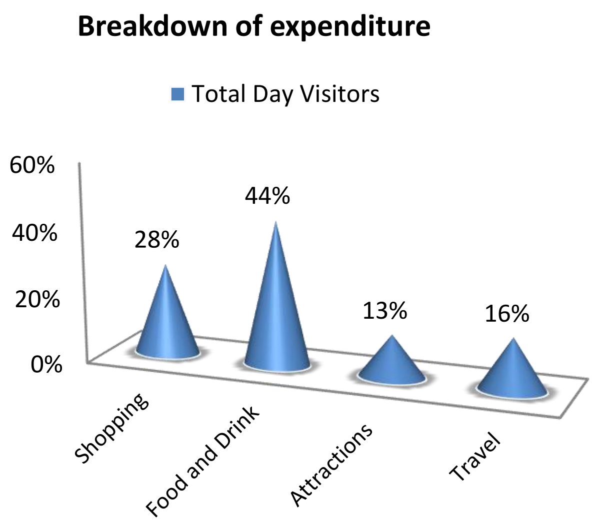
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£39,582,000	£18,204,000	£32,909,000	£15,383,000	£22,284,000	£128,362,000
Overseas tourists		£4,584,000	£5,085,000	£4,011,000	£1,718,000	£1,762,000	£17,160,000
Total Staying		£44,166,000	£23,289,000	£36,920,000	£17,101,000	£24,046,000	£145,522,000
Total Staying (%)		30%	16%	25%	12%	17%	100%
Total Day Visitors		£0	£74,176,000	£117,444,000	£34,768,000	£42,322,000	£268,710,000
Total Day Visitors		0%	28%	44%	13%	16%	100%
Total	**2017**	**£44,166,000**	**£97,465,000**	**£154,364,000**	**£51,869,000**	**£66,368,000**	**£414,232,000**
%		**11%**	**24%**	**37%**	**13%**	**16%**	**100%**
Comparison	**2016**	**£42,765,000**	**£94,627,000**	**£149,908,000**	**£50,322,000**	**£64,451,000**	**£402,073,000**
Difference		**3%**	**3%**	**3%**	**3%**	**3%**	**3%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£10,047,000	£767,125	£4,195,125	£12,991,000	£28,000,250

Spend on second homes is assumed to be an average of £2,100 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,100 on berthing charges, servicing and maintenance and upgrading of equipment. Static van spend arises in the case of vans purchased by the owner and used as a second home. Expenditure is incurred in site fees, utility charges and other spending and is estimated at £2,100. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £185 per visit has been assumed

Direct Turnover Derived From Trip Expenditure

Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending.

		Staying Visitor	Day Visitors	Total
Accommodation		£44,904,000	£2,349,000	£47,253,000
Retail		£23,057,000	£73,434,000	£96,491,000
Catering		£35,813,000	£113,921,000	£149,734,000
Attractions		£17,703,000	£36,684,000	£54,387,000
Transport		£14,428,000	£25,393,000	£39,821,000
Non-trip spend		£28,000,250	£0	£28,000,250
Total Direct	**2017**	**£163,905,250**	**£251,781,000**	**£415,686,250**
Comparison	**2016**	**£158,985,250**	**£244,584,000**	**£403,569,250**
Difference		**3%**	**3%**	**3%**

Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Supplier and Income Induced Turnover

		Staying Visitor	Day Visitors	Total
Indirect spend		£25,688,000	£35,132,000	£60,820,000
Non trip spending		£5,600,000	£0	£5,600,000
Income induced		£18,030,000	£4,973,000	£23,003,000
Total	**2017**	**£49,318,000**	**£40,105,000**	**£89,423,000**
Comparison	**2016**	**£47,808,000**	**£38,980,000**	**£86,788,000**
Difference		**3%**	**3%**	**3%**

Income induced spending arises from expenditure by employees whose jobs are supported by tourism spend.

Total Local Business Turnover Supported by Tourism Activity – Value of Tourism

		Staying Visitor	Day Visitors	Total
Direct		£163,905,250	£251,781,000	£415,686,250
Indirect		£49,318,000	£40,105,000	£89,423,000
Total Value	**2017**	**£213,223,250**	**£291,886,000**	**£505,109,250**
Comparison	**2016**	**£206,793,250**	**£283,564,000**	**£490,357,250**
Difference		**3%**	**3%**	**3%**

Employment

Employment

The model generates estimates of full time equivalent jobs based on visitor spending. The total number of 'actual' jobs will be higher when part time and seasonal working is taken into account. Conversion of full time equivalent jobs into actual jobs relies on information from business surveys in the sectors receiving

Direct employment

Full time equivalent (FTE)						
	Staying Visitor		Day Visitor		Total	
Accommodation	904	33%	47	1%	952	15%
Retailing	232	8%	738	20%	969	15%
Catering	656	24%	2,087	55%	2,744	42%
Entertainment	340	12%	704	19%	1,044	16%
Transport	109	4%	192	5%	301	5%
Non-trip spend	519	19%	0	0%	519	8%
Total FTE 2017	**2,759**		**3,768**		**6,528**	
Comparison 2016	**2,676**		**3,661**		**6,337**	
Difference	**3%**		**3%**		**3%**	

Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	1,339	34%	70	1%	1,409	15%
Retailing	347	9%	1,106	20%	1,454	15%
Catering	984	25%	3,131	56%	4,115	43%
Entertainment	479	12%	993	18%	1,472	16%
Transport	154	4%	270	5%	424	4%
Non-trip spend	591	15%	0	0%	591	6%
Total Actual 2017	**3,894**		**5,571**		**9,465**	
Comparison 2016	**3,775**		**5,413**		**9,188**	
Difference	**3%**		**3%**		**3%**	

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	579	651	1,230
Induced jobs	334	92	426
Total FTE 2017	**913**	**743**	**1,656**
Comparison 2016	**885**	**722**	**1,607**
Difference	**3%**	**3%**	**3%**

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	661	742	1,402
Induced jobs	381	105	486
Total Actual 2017	**1,041**	**847**	**1,888**
Comparison 2016	**1,009**	**823**	**1,832**
Difference	**3%**	**3%**	**3%**

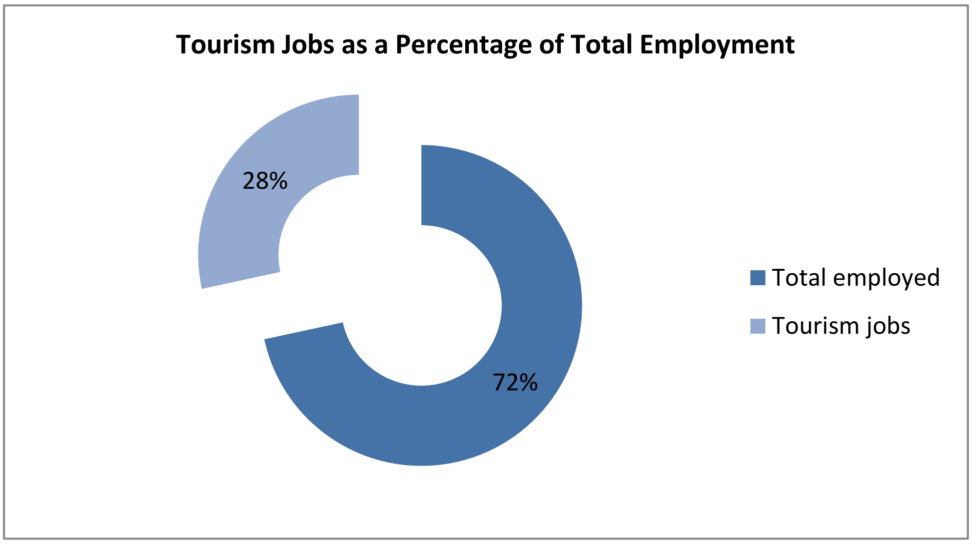
Total Jobs

Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Direct		2,759	75%	3,768	84%	6,528	80%
Indirect		579	16%	651	14%	1,230	15%
Induced		334	9%	92	2%	426	5%
Total FTE	**2017**	**3,673**		**4,511**		**8,184**	
Comparison	**2016**	**3,561**		**4,383**		**7,944**	
Difference		**3%**		**3%**		**3%**	
Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		3,894	79%	5,571	87%	9,465	83%
Indirect		661	13%	742	12%	1,402	12%
Induced		381	8%	105	2%	486	4%
Total Actual	**2017**	**4,935**		**6,417**		**11,352**	
Comparison	**2016**	**4,784**		**6,236**		**11,020**	
Difference		**3%**		**3%**		**3%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day visitors	Total
Total employed		40,000	40,000	40,000
Tourism jobs		4,935	6,417	11,352
Proportion all jobs		**12%**	**16%**	**28%**
Comparison	**2016**	**4,784**	**6,236**	**11,020**
Difference		**3%**	**3%**	**3%**



The key 2017 results of the Economic Impact Assessment are:

8.8 million trips were undertaken in the area
8.2 million day trips
0.6 million overnight visits

2.6 million nights in the area as a result of overnight trips

£414 million spent by tourists during their visit to the area
£35 million spent on average in the local economy each month.

£146 million generated by overnight visits
£269 million generated from irregular day trips.

£505 million spent in the local area as result of tourism, taking into account multiplier effects.

11,352 jobs supported, both for local residents from those living nearby.
9,465 tourism jobs directly supported
1,888 non-tourism related jobs supported linked to multiplier spend from tourism.

Appendix I - Introduction about Cambridge Model

This report examines the volume and value of tourism and the impact of that expenditure on the local economy. The figures were derived using the Cambridge Economic Impact Model and the research was undertaken by Destination Research.

The model utilises information from national tourism surveys and regionally based data held by Destination Research. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

Limitations of the Model

The methodology and accuracy of the above sources varies. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. It is important to note that in the national tourism surveys the sample sizes for each area changes year on year. This is as a result of the random probability nature of the methodology. As such, the results of the Cambridge Model are best viewed as a snapshot in time and we would caution against year-on-year comparisons.

It should be noted that the model cannot take into account any leakage of expenditure from tourists taking day trips out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas, in locations receiving significant numbers of day visitors from London, there is likely to be an underestimate in relation to the number of overseas day visitors staying in holiday accommodation in London.

Whilst it is important to be aware of these issues, we are confident that the estimates we have produced are as reliable as is practically possible within the constraints of the information available.

Rounding

All figures used in this report have been rounded. In some tables there may therefore be a slight discrepancy between totals and sub totals.

Data sources

The main national surveys used as data sources in stage one include:

- Great Britain Tourism Survey (GBTS) - information on tourism activity by GB residents;
- International Passenger Survey (IPS) information on overseas visitors to the United Kingdom;
- Day Visits in the annual Great Britain Day Visitor Survey using information on visits lasting more than 3 hours and taken on an irregular basis

These surveys provide information down to a regional level. In order to disaggregate data to a local level the following information sources are used:

- Records of known local accommodation stock held by Destination Research;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Mid- 2014 estimates of resident population as based on the 2011 Census of Population;
- Selected data from the 2011 Census of Employment;
- Selected data on the countryside and coast including, national designations and length of the coastline.

Staying Visitors

The GBTS provides information on the total number of trips to the region and the relative proportions using different types of accommodation. By matching these figures to the supply of such accommodation, the regional average number of trips per bedspace or unit of accommodation can be derived. The IPS provides information on the total number of trips by overseas visitors to the region. The model uses three year rolling averages to reduce extreme highs and lows which are due to small sample sizes, rather than being a reflection on drastic changes in demand year-on-year.

Day Visitors

Information on day trips at the regional level is available from the Day Visits in Great Britain survey. The survey includes all leisure-related trips from home. It should be noted that a large proportion are local trips made by people resident in the locality. The model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

Impact of tourism expenditure

This section examines the impact of the tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of the actual jobs (both direct and indirect) supported by tourism expenditure in the district.

The GBTS, IPS and Day Visits to Great Britain survey data on the breakdown of visitor spending. The impact of this initial round of expenditure will be subsequently increased by multiplier effects. These arise from the purchase of supplies and services by the businesses in receipt of visitor expenditure (indirect impacts), and by the income induced-effects arising from the spending of wages by employees in the first round of business and in subsequent expenditure in supplier business (induced impacts).

The New Earnings Survey which provides information on wage levels by industry sector and region; An internal business database which includes data on the structure of business expenditure, local linkages and multiplier ratios drawn from a wide range of business and economic studies carried out by Geoff Broom Associates, PA Cambridge Economic Consultants and others. By applying the breakdown to the estimates of visitor spending, the model generates estimates of total direct spending.

Evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover – for example, some expenditure on food and drink actually takes place in inns and hotels that fall in the accommodation sector and within attractions. More significantly, expenditure on travel costs associated with individual trips is equally likely to take place at the origin of the trip as the destination. Therefore the model assumes that only 40% of travel expenditure accrues to the destination area.

Number of full time job equivalents
Having identified the value of turnover generated by visitor spending, it is possible to estimate the employment associated with that spending. Wages for staff and drawings for the proprietors will absorb a proportion of that turnover. By applying these proportions to the overall additional turnover in each sector, the amount of money absorbed by employment costs can be calculated. The New Earnings Survey provides data from which the average costs by business sector, adjusted to take account of regional differences, can be calculated.

After allowing for additional costs such as National Insurance and pension costs, an average employment cost per full time equivalent job can be estimated. The number of such jobs in the local area can then be estimated by dividing the amount of business expenditure on wages and drawings by the average employment cost per job.

Number of Actual Jobs

The model generates estimates of full time equivalent jobs based on visitor spending. However, the total number of actual jobs will be higher when part time and seasonal working is taken into account. The full time equivalent jobs arising directly from visitor spending are converted into actual jobs using information from business surveys in the sectors receiving visitor spending. In general, the conversion factor varies around 1.5 in those sectors.

The indirect and induced jobs arise across a much wider range of employment sectors. Therefore, the average 1.16 for all sectors based on Census of Employment data has been used to convert full time equivalent jobs in this sector to actual jobs.

The employment estimates generated by the model include both self employed and employed

Produced by:

destination**research**
delivering results : measuring what matters

Registered in England No. 9096970
VAT Registration No. GB 192 3576 85

45 Colchester Road
Manningtree
CO11 2BA

Sergi Jarques
Director
Tel: 01206 392528
[redacted]

Appendix J - Information About Visit North Norfolk

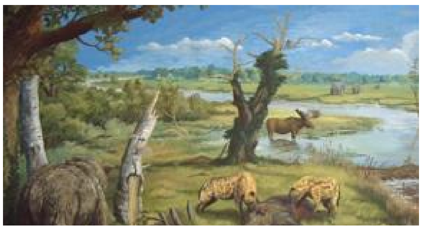
THE DEEP HISTORY COAST

The unique Deep History Coast in north-east Norfolk is home to some of the earliest evidence of human British civilisation with footsteps left by the UK's first tourists nearly one million years ago. The world's biggest mammoth skeleton remains were found at West Runton and a 550,000 year old flint axe was discovered in Happisburgh. Discover more about this fascinating coastline steeped in millions of years worth of history.

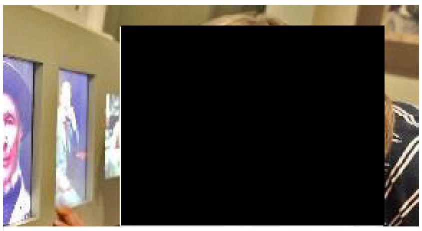
FIND OUT HOW TO BEACHCOMB

DEEP HISTORY COAST FILM

FIND OUT ABOUT WEST RUNTON BEACH



CROMER FOREST-BED FOSSIL PROJECT



FIND OUT ABOUT CROMER MUSEUM

DISCOVER MORE HISTORY AND HERITAGE

EXPLORING THE DEEP HISTORY COAST

This part of Norfolk has universally changed understanding of pre-prehistoric times. Discoveries have meant the Norfolk Deep History Coast has contained some of the most important archaeological finds in Western Europe, the country's best preserved Neanderthal site and is the only county where evidence of four species of human have been found. This part of the country is where, pre-Ice Age, Britain was connected via a land mass to the Continent known as Doggerland.

Footprints dating back 850,000 years have been left at Happisburgh by the first visitors to Norfolk. These footprints, belonging to nomads hunting bison, rhinos, deer and mammoths, have become the oldest evidence of humans outside Africa's Great Rift Valley. The footprints were found in 2013 by chance when a team of scientists were, after high seas had scoured the shoreline revealing estuary mud, conducting a geophysics survey.

Historically, this area would have been a great plain, similar to East Africa's Serengeti, grazed by animals. The footmarks were discovered in what would have been an estuary of a river system that flowed into the North Sea and included the Thames, which was fed by an extinct river from the Midlands called the Bytham. The footprints were found to be the marks of toes and heels of five adults and children.

Along the coast at West Runton, the remains of a 600,000 year old mammoth were discovered. This discovery is the oldest mammoth skeleton to have been found in the UK and the most complete specimen of the species to have been found in the world. After a stormy night in 1990, a couple walking by the bottom of the cliffs discovered the pelvic bone of the mammoth. A year or so late after another storm, more bones were revealed. This lead to an exploratory dig taking place in 1992 and then an excavation in 1995. The most complete skeleton of a mammoth was revealed, identified as the species Mammuthus trogontherii (Steppe Mammoth).

Most of the skeleton was there; about 85%, and the missing parts were nibbled off by scavenging hyaenas as shown by hyaena bitemarks and fossilised hyaena dung! The skeleton is 4m tall at the shoulder and weighs 10 tonnes, making it twice as large as discoveries on the Jurassic Coast. You can see some of the remains in Cromer Museum, Gressenhall Farm and Workhouse and Norwich Castle Museum. Along the West Runton Freshwater Bed, rhino teeth and bones have also been found.

Furthermore, around 550,000 years ago, there was the discovery of a flint hand axe at Happisburgh. This Palaeolithic tool had been preserved in a former forest within a dense peaty deposit. The axe was discovered by a dog-walker in 2000, which led to even older tool and bone finds. The significance of this find changed history. It pushed back the evidence for human colonisation this far north by 100,000 years or more. You can see the flint tool at Norwich Castle Museum, just a short drive from north Norfolk.

Beachcombing along the Deep History Coast at beaches including West Runton and Happisburgh which is 16 miles away, can be fascinating with finds including amber, fossil sea urchins and belemnites. Search the shores of Hunstanton and you may find sharks teeth and look out for fossilised coral along Sheringham beach. There is also Cromer's underwater chalk reef 200m from the shore, the Cromer chalk ridge (the hightest point in East Anglia) and the prehistoric Cromer Forest-Bed in Weybourne. Each year, there are more than 20,000 fossil finds! You can take any fossil finds to the Cromer Museum for identification.

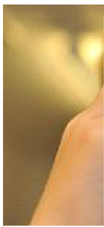
Please note: As long as you are not in a protected area, you can pick up small fossils that are lying around on the ground. Please do not remove any fossils from rocks or cliffs, and large fossils are best left for all to enjoy. If you are lucky enough to come across a rare find, please report it to a museum and if you're in a Site of Specific Scientific Interest, please follow any rules they might have. They are there to protect geology for future generations.

NATURE & WILDLIFE IN NORTH NORFOLK

SIGN UP AND KEEP UPDATED

HAPPISBURGH

BEST PLACES TO FIND FOSSILS



M [redacted] NORFOLK

EXPLORE MORE OF NORTH NORFOLK

UNIQUE FACTS ABOUT NORTH NORFOLK

SEARCH FOR PLACES TO STAY

(Any Property Type) ▼

From

Night(s) 1

Near

(Any town) ▼

or Property name

SEARCH

DISCOVER HAPPISBURGH

The historic village of Happisburgh has a secluded sandy beach and a fascinating history showing the earliest signs of humans in Britain. The constantly changing coastline, its 18th century lighthouse and 15th century church makes Happisburgh a fascinating place to explore.

Happisburgh is home to the oldest working light in the county and the only independently operated lighthouse in the UK. The famous red and white striped lighthouse was built in 1790 and offers wonderful views of the coast and countryside. In the summer, it is open to visitors on occasional Sundays.

HISTORY AND HERITAGE OF NORTH NORFOLK

Coastal erosion is constantly changing the landscape of the coastline at Happisburgh and that has also revealed evidence of humans being present in Britain 200,000 years earlier than had previously been known. Flint axes and early fossilized human footprints dating back 800,000 years signified the oldest evidence of man outside the Great Rift Valley in Africa! These finds, as well as the mammoth skeleton in West Runton, have earned this coastline the name, the Deep History Coast.

FIND OUT ABOUT THE DEEP HISTORY COAST

WATCH 'HOW TO BEACH COMB'

St Mary's church also dominates the Happisburgh skyline and dates back to the 15th century. Its 110ft tower, overlooks the sea and is an important landmark warning mariners of the nearby sandbanks. Indeed, the

FIND A PLACE TO STAY

graveyard has memorials to the many sailors who lost their lives in the treacherous waters, including the 119 sailors of HMS Invincible, who in were on their way to join Nelson in Copenhagen in 1801. If you climb the 133 steps up the tower, you can see 30 churches, two lighthouses, seven water towers and even the Cathedral spire in the city of Norwich over 16 miles away.

VISIT NORWICH

The secluded, sandy beach is dog friendly and great for days out. From the beach, you can walk as far as Sea Palling taking in wonderful views. Happisburgh is a pretty village and is an ideal base for a north Norfolk holiday.

FIND A PLACE TO EAT

FIND THINGS TO DO

EXPLORE MORE OF NORTH NORFOLK

EXPLORE THE OUTDOORS

FIND THE HIDDEN GEMS OF NORTH NORFOLK

FIND A PLACE TO STAY

(Any Property Type) ▼

From

Night(s) 1

Near

(Any town) ▼

or Property name

SEARCH

DISCOVER MUNDESLEY

Mundesley is a pretty Victorian seaside village where families can enjoy a traditional holiday away from the hustle and bustle. Set in an Area of Outstanding Natural Beauty, Mundesley offers great coastal walks and is close to the Broads National Park.

The coastal village of Mundesley became popular with the Victorians, when visitors were brought to the area with the opening of a railway in 1889. Visitors were able to sample the finest air in the country! The railway has long gone, but the fresh sea breezes off the North Sea still attract visitors.

The village is a great starting point for country walks with plenty of footpaths and circular routes. Close by is Southrepps Common, an important area for wildlife with woodland and wild flowers.

MUNDESLEY CIRCULAR WALK

Mundesley's Blue Flag wide sandy beach, with colourful beach huts and shallow rock pools, are an ideal playground for children of all ages, and there is also great year-round sea fishing.

A fine nine-hole golf course built in 1901, sits on the hillside of the River Mun valley and offers unrivalled views over the coast and countryside, which is a designated Area of Outstanding Natural Beauty.

FIND OUT ABOUT GOLFING IN NORTH NORFOLK

AREA OF OUTSTANDING NATURAL BEAUTY

FIND A PLACE TO STAY

BLUE FLAG BEACHES

The charming village has pretty cottages, shops, pubs and places to eat and stay with pretty thatched buildings and stone walls. Mundesley is also home to the Maritime Museum, believed to be one of the smallest museums in England! Opposite the museum is a World War II memorial to the men who were killed while clearing landmines from the cliffs and beaches.

MUSEUMS IN NORTH NORFOLK

Mundesley is perfect for those seeking a traditional seaside holiday, scenic walks and family friendly activities.

FIND A PLACE TO EAT

FIND THINGS TO DO

EXPLORE MORE OF NORTH NORFOLK

FIND OUT WHATS ON IN NORTH NORFOLK

EXPLORE NORTH NORFOLK

FIND A PLACE TO STAY

(Any Property Type) ▼

From

Night(s) 1

Near

(Any town) ▼

or Property name

SEARCH

DISCOVER NORTH WALSHAM

North Walsham is steeped in history dating back to Anglo-Saxon times. Close to the Broads National Park and north Norfolk coast, and surrounded by scenic countryside, North Walsham is an ideal holiday base to explore north Norfolk.

The market town, North Walsham, became a centre for weaving in the Anglo-Saxon era, along with the nearby village of Worstead (from where the cloth gets its name). The wealth generated, enabled the local people to build St. Nicholas Church which dates back to 1330. Its tall tower is the second tallest in Norfolk after Norwich Cathedral.

CHURCHES IN NORTH NORFOLK

The market place houses a 16th century cross with clock, the focal point of the town, which was built to collect rent from the market traders. Today, a market runs on Thursdays and the rest of the town has plenty of shops, eateries, places to stay and historical buildings including Paston College where Horatio Nelson, spent his school days between 1768 and 1771.

For Nelson enthusiasts, you can visit Nelson's birthplace, Burnham Thorpe, about an hour away from North Walsham. A stroll around the village reveals the site of the Parsonage where Nelson was born (which was knocked down in 1803) and raised before going to sea at the tender age of 12. You will also find All Saint's Church where Nelson's father Edmund was rector and Nelson's local pub, The Lord Nelson, known at the time as the Plough Inn.

FIND A PLACE TO STAY

NORTH NORFOLK HISTORY AND HERITAGE

Nearby Bacton Woods has 280 acres of ancient woodland, dating back to Saxon times. The marked trails through the beautiful woodland offers great walking routes and terrain for mountain biking.

BACTON WOODS LEAFLET

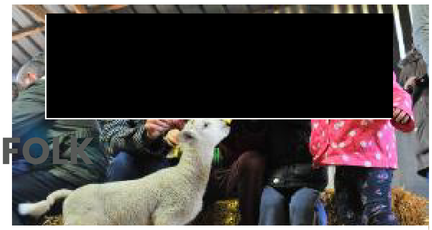
Its historic buildings and proximity to the Broads National Park and coast, makes North Walsham well worth visiting.

DISCOVER THE BROADS NATIONAL PARK

WATCH 'HOW TO MOOR A BOAT'

EXPLORE MORE OF NORTH NORFOLK

FIND A PLACE TO EAT



FIND THINGS TO DO

SIGN UP TO OUR ENEWS TO HEAR MORE

NORTH NORFOLK ON FILM

FIND A PLACE TO STAY

(Any Property Type) ▼

From

Night(s) 1

Near

(Any town) ▼

or Property name

SEARCH

VISIT NORTH NORFOLK

Visit North Norfolk is the offically commissioned Destination Management Organisation and visitor guide for north Norfolk.

ABOUT VISIT NORTH NORFOLK

Visit North Norfolk, a membership organisation, is the official Destination Management Organisation (DMO) for the area, operating on a not-for-profit basis and delivering the official tourism website and marketing activity for North Norfolk District Council.

DMOs are organisations charged with representing a specific destination and helping the long-term development of the local tourism economy through targeted and strategic campaigns. Visit North Norfolk is responsible for promoting all that the area has to offer at local, regional and national levels and is affiliated with Visit East of England and Visit Norfolk. Visit North Norfolk, as the accredited authoritative DMO for north Norfolk, is also affiliated with Visit Britain.

Visit North Norfolk delivers two key aspects of the local tourism economy: support for businesses and the promotion of the area to potential visitors, providing a major channel for communication, support and access to market for the tourism industry.

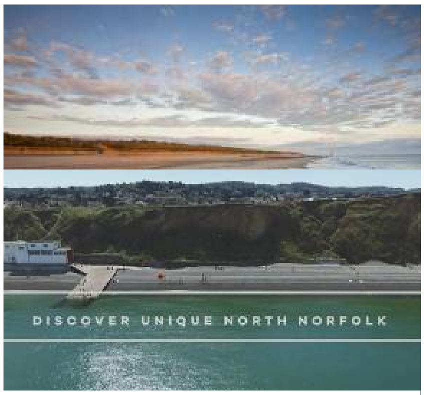
By developing promotional campaigns and initiatives, Visit North Norfolk works with other DMOs to grow the area's visitor economy which is worth £505m and supports over 11,000 jobs. Marketing activity is supported by North Norfolk District Council and private business sponsorship and its core business is self-sustaining through business membership funding. Visit North Norfolk is a business-led DMO, operated by a group of local business leaders (in partnership with North Norfolk District Council). This meets the Government's stated direction of encouraging businesses to become more directly responsible for tourism promotion.

The board comprises the following directors:

Chairman: Andrew Hird, General Manager of Woodland Holiday Park
Mark Noble, Trustee of Pensthorpe Conservation Trust
Bee Hopkins, owner of The Hoste.

THOUGHT ABOUT MEMBERSHIP?

SIGN UP TO KEEP UPDATED



LATEST MARKETING CAMPAIGN

Appendix K - Information About Visit Norfolk

THE PERFECT YEAR-ROUND DESTINATION

GET AHEAD OF THE CROWD... BOOK YOUR 2019 HOLIDAY IN NORFOLK

WHERE TO GO IN NORFOLK

Great Yarmouth: one of the UK's top seaside resorts

North Norfolk: beautiful beaches, cliffs and tidal

Pensthorpe Natural Park - Naturally inspiring every generation

There's Nowhere Like Norfolk

Norfolk is a great all-year holiday, weekend or short break destination

On the mid-east coast of England, we enjoy over 90 miles of unspoilt coastline, beautiful countryside, the unique Broads National Park, forests and heathland, internationally important nature reserves, picturesque market towns, amazing birdwatching and the fabulous seaside resorts of Great Yarmouth, Cromer, Wells-next-the-Sea and Hunstanton.

There's Norwich, a fantastic city of heritage, culture and shopping, as well as countless outdoor activities, a fantastic variety of family theme parks and attractions, historical sights and Royal connections.

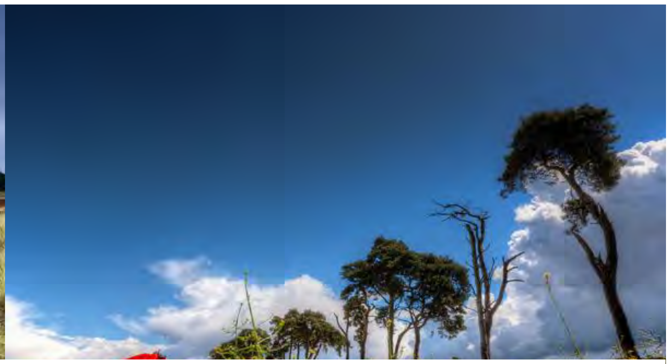
What are you waiting for? Come and Visit Norfolk...

WHAT'S ON IN NORFOLK

BOOK YOUR STAY IN NORFOLK

Where would you like to go in Norfolk?

Coast and seaside



Countryside

THINGS TO DO IN NORFOLK

Your essential Visit Norfolk Bucket List

Top 10 beaches in Norfolk

EXPLORE OUR COUNTY

Explore the seven areas of Norfolk - each one offering a superb range of things to do and see, attractions and accommodation...

Brecks & Thetford Forest

Broadland & Broads

Greater Yarmouth

King's Lynn & West Norfolk

North Norfolk

Norwich

South Norfolk & Waveney Valley

LEARN MORE ABOUT NORFOLK

Friendly Invasion: When Norfolk was 'Little America'

READ MORE

Special Relationship: The Norfolk man who saved the American Revolution

READ MORE

How a Norfolk man and his native Indian wife started The Special Relationship

READ MORE

SIGN UP FOR OUR NEWSLETTER

WHAT'S ON

FIND A PLACE TO STAY

NORTH NORFOLK COAST AND COUNTRYSIDE

North Norfolk is renowned for its spectacular coastline, fantastic wildlife, miles of glorious beaches, seaside communities and a beautiful hinterland of rolling countryside and picturesque market towns and villages. North Norfolk must be the birdwatching capital of the UK, and you can even take a boat trip to see our seal colony at Blakeney Point.

HIGHLIGHTS OF NORTH NORFOLK

An Area of Outstanding Natural Beauty

Between the lively seaside resort of Hunstanton and the pretty town of Sheringham is a spectacular coastline, most of which is designated as an Area of Outstanding Natural Beauty.

Here the landscape of tidal marshes, creeks, shingle spits, and sweeping golden beaches is backed by explorable pine woods. It includes the Holkham Hall and Estate, and its beach at Wells-next-the-Sea, consistently voted the best in Britain.

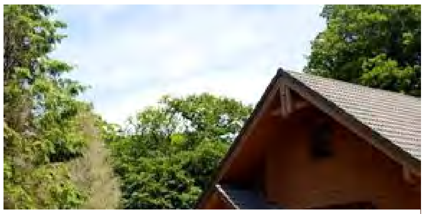
Further to the East is the imperious clifftop setting of Cromer, with its Victorian pier striding proudly out to sea. The coastline then meanders southward to the secluded beaches of Mundesley and Happisburgh, with its striped lighthouse, and inland to the traditional market town of North Walsham.

The magic of North Norfolk is that as the seasons and tides change, it offers completely different qualities and scenery.

The North Norfolk Railway begins at Sheringham and ends at genteel Holt, a fabulously handsome market town which has become a mecca for discerning visitors looking for independent shops. Most of Holt was burned in its famous fire of 1708, and in its place rose a splendid Georgian town focusing on an appealing Market Place.

This is also Deep History Coast, where the biggest and best-preserved mammoth skeleton was found, along with a prehistoric flint axe and 850,000 year old human footprints – the oldest evidence of man found outside the Great Rift Valley in Africa.

PLACES TO VISIT IN NORTH NORFOLK



Book your north Norfolk stay

Things to do in north Norfolk

Inland in north Norfolk, UK

WELLS TO HUNSTANTON

ABOUT VISIT NORFOLK

Visit Norfolk is the strategic voice of the county's visitor industry. Visitnorfolk.co.uk is run under contract by Visit East Anglia Ltd. and is responsible for promoting all that the county has to offer at local, regional and national levels.

It aims to develop promotional campaigns and initiatives and work with other DMOs (destination marketing organisations) to grow the county's visitor economy which supports some 61,521 jobs, 17.3% of all employment in Norfolk. The sector also supports thousands more jobs in retail, food production, culture and transport.

The visitor economy is the largest industry sector in the county, worth £3.055 billion.

Visit East Anglia won the contract to manage the development of Norfolk tourism from November 2012, following a tendering process overseen by New Anglia Local Enterprise Partnership and Norfolk County Council.

Visit Norfolk's marketing activity is supported by local district councils, the Broads Authority, and private sector partnerships including Visit Norwich, Enjoy The Broads, Visit North Norfolk, Norfolk and Suffolk Tourist Attractions and Gt Yarmouth Tourism Business Improvement District.

One of Visit Norfolk's key objectives is to encourage all the county's tourism organisations involved in promoting Norfolk to become more self-sustaining and less reliant on public funding. This meets the Government's stated direction of encouraging businesses to become more directly responsible for tourism promotion.

Visit Norfolk within the national context

Visit Norfolk works closely with its partner organisations, regional and national bodies to promote the county. The national tourism structure is:

Visit Britain: Britain's national tourism agency, responsible for marketing Britain overseas, working with thousands of organisations in the UK and overseas. Visit Britain promotes Britain in 35 markets around the world via a range of campaigns, and also promotes the tourism industry within the UK itself. Their consumer facing website is www.visitbritain.com.

Visit England: The strategic leadership body representing the public and private sector stakeholders of English Tourism. Visit England works in partnership with Visit Britain, local and regional DMOs, and the private sector, creating a national tourism strategy, optimising marketing investment, and developing the visitor experience across England.

Visit East Anglia: A business-led, not-for-profit organisation to promote tourism across East Anglia. It is supported by some of the most successful tourism businesses in Norfolk and Suffolk, including Adnams, Africa Alive!, Banham Zoo, BeWILDerwood, Dinosaur Adventure, Flying Kiwi Inns, Gough Hotels, Norfolk Broads Direct, Norfolk Country Cottages, Suffolk Secrets and T&A Hotel Collection and Wroxham Barns. Consumer, customer and membership focussed, Visit East Anglia is managed by experts and brings a unified tourism voice to East Anglia.

Visit East Anglia is working closely with Greater Anglia, the new East Anglian rail franchise operator, and has established links with the major airports, seaports and other gateways in both East Anglia and neighbouring counties.

Visit East Anglia Limited is also supported by the New Anglia Local Enterprise Partnership (LEP) and is therefore fully aligned with the Tourism Strategy for England.