

# **1. CONTEXTS, THE BRIEF, STUDY ELEMENTS AND METHODOLOGY**

## **1.1 The context - general**

The interfaces between the North Sea coastline, the rivers and estuaries of the Rivers Alde, Ore and Butley, and the adjacent rural and urban areas of eastern Suffolk have created a series of distinctive micro-landscapes. In combination, they have created a region which has attracted artists and artisans, farmers and fishermen, musicians and master masons.

Not one of these interfaces or landscapes or activities is a constant and each is subject to a variety of external and internal influences. Some are long term, such as changes in global climates and sea-levels or changes in employment structures, and are beyond local influence. Some are short term, such as foot and mouth disease, swine fever or BSE, also beyond local control and can have unexpected, immediate and destructive impacts upon local lives and businesses. Seemingly equally resistant to change and/or local influence are the distantly determined farming, fishing, industrial and environmental policies of the European Union in Brussels or HM Government in London.

To many, however, the endogenous impacts emanating from the decisions of elected representatives in local councils or of officials from non-elected quangos can cause equal concerns. In addition, changing attitudes and patterns in work, lifestyles, mobility, affluence, leisure, entertainment and the environment create new and unexpected pressures on the facilities and amenities of local urban and rural areas and communities of eastern Suffolk.

## **1.2 The context – specific**

As a result of these and other concerns, the Friends of the Rivers (FOTR) was formed by the Alde & Ore Association to consider proposals by the Environment Agency for the management of the morphology of the Ore/Alde Estuary and by English Nature in respect of Regulation 33 advice to ‘relevant authorities’, and to maintain a watching brief on behalf of those whose leisure and livelihoods depend upon the navigability and viability of the rivers Ore and Alde (1.1 of Tender Document).

FOTR identified a need for and lack of up to date and relevant economic data in the preparation of these and other reports in the area. In particular the Environment Agency considered only agricultural land values when assessing the costs and benefits of different estuarine management strategies. Similarly neither CHaMPS nor the Lowestoft to Felixstowe Shoreline management Plan considered socio-economic impacts (positive or negative) of any management proposals (1.2).

Likewise, local authorities concerned with planning for and management of local infrastructure and with the management and marketing of leisure and tourism in the area have not thus far been able to factor into their own thinking the economic significance of the recreational and commercial use of the rivers Alde and Ore (1.2).

### **1.3 The brief**

To explore in detail the economic contribution of businesses associated with the recreational and commercial use of the Estuarine Rivers Ore and Alde including the economic contribution associated with the special wildlife, commercial and leisure boating and environmental interests of the area (2.1)

### **1.4 Study elements**

1. identify current activities on the river
2. establish the unique attributes, including environmental attributes, of the area
3. create a socio-economic profile of users of the rivers and their hinterland
4. identify the range, scale and type of businesses supplying users of the rivers and their hinterlands
5. establish an expenditure profile of users of the rivers and their hinterlands
6. identify the economic contribution made by users of the rivers and their hinterland
7. identify the economic contribution made by users of the rivers and their hinterland elsewhere
8. identify additional economic activity attributable to the management of the rivers
9. establish seasonal patterns for use of the rivers and their hinterland
10. prepare case studies to illustrate different types of businesses and river users and promote understanding of the local spending mix.

### **1.5 Methodology**

The study comprises eight distinct but inter-related elements:

- i. Commissioning
- ii. Research approach
- iii. Identify and search documentary sources in public and non-public domains
- iv. Undertake original field and market research locally
- v. Organise original highly focused questionnaire surveys
- vi. Interview key stakeholders
- vii. Where appropriate to develop and apply relevant concepts and models to enhance understanding
- viii. Synthesise accumulated material and knowledge to make practical and viable recommendations regarding opportunities and potential contributions.

## **2. THE FRIENDS OF THE RIVERS study area (FOTRsa)described**

*The Deben Peninsula [ie the area between the Deben and Alde & Ore rivers] has a unique charm and varied natural beauty, its coastal heathlands contrasting with the undulating farmland to the west....The landscape quality of the area has been recognized nationally....The area is also important for nature conservation...The settlements of the area vary greatly in size, form and character...This combination of the high quality of the built and rural environments, the character of the settlements, its landscape quality, and the possible damaging effect of modern development pressures, make it imperative that any new development is carried out to a high standard of design (Suffolk Coastal Local Plan 2001,10.1-10.5, p.207)*

**2.1** The area which is defined for this study is shown on Figure 1 (Note – for the remainder of this study it will be referred to as FOTRsa, that is Friends Of The River study area). It approximates to a rectangular area which to the east is bounded by part of Aldeburgh Bay/ Hollesley Bay/Orford Beach, to the north by the B1094, to the west by the B1069, and to the south by the minor road from near Bromeswell to Hollesley. It includes the fourteen parishes of Aldeburgh, Boyton, Butley, Capel St Andrew, Chillesford, Friston, Gedgrave, Hollesley, Iken, Orford, Snape, Sudbourne, Tunstall and Wantisden. These had a combined population estimated at 7,350 in 2000.

### **2.2 Unique features**

The following descriptions of the uniqueness and significance of the area are taken from *A Report for the North America and UK Countryside Exchange Programme* (October 2002, Section 3).

*The Alde and Ore area is a unique site in a setting of an extensive river environment associated with a coastal estuary, set against a north seascape where many enjoy a pleasant climate and tranquil environment. The area has a rich diversity of natural and historical settings. Its location not too distant from major metropolitan sites offers the opportunity for weekend and tranquil holidays.*

*A sinuous estuary and river system lies on the landscape as an artery providing life to communities, agriculture, recreationists, unique wildlife and habitats that support them. The river corridor provides commerce, footpaths, and access to villages, towns and cultural opportunities. Its banks and marshes are grazed, walked and hunted, its channels sailed and fished, to put it simply the estuary is the 'centre of life'.*

*The coastline of Orford Ness is a unique geological feature of shingle beaches where generations have enjoyed innumerable sunrises. Communities are enjoyed by families with generations of traced ancestry and recently are being*

*enjoyed by new residents. It is clear many appreciate the area assets in retirement.*

*The area has a noteworthy historical significance, much of which is associated with coastal defence and maritime commerce. In the end result, it is an area that provides a variety of quality features that make this a 'North Sea Gem'. Maybe the consummate example of this fact is the plethora of special, natural areas that are the foundation for many designations all wrapped inside the Suffolk Coast and Heaths Area of Outstanding Natural Beauty.(3.1)*

*The major reasons why people are interested in the Alde and Ore were identified as*

- **Residential** – *the attractive towns and villages that have access to both the river and estuary and offer an opportunity for natural resources, work and pleasure.*
- **Commercial** – *traditional businesses are still available and thriving, these include fishing, farming and maritime services. The rise in tourism within the area has been of benefit to the service sector, including hoteliers, restaurants and businesses associated with the tourist sector.*
- **Recreational** – *the area is replete with opportunities to enjoy watching the surrounding water environments including sailing, fishing, bird watching and other leisure pursuits. The unique landscape also offers the opportunity to undertake activities such as rambling, horse riding, cycling, golf, and tennis among others.*
- **Conservational and Preservation** – *the outstanding number of designated natural sites is noteworthy. These include the heritage coast, an area of outstanding natural beauty, sites of special scientific interest, special protection areas, protected wildlife sites, and nature reserves to name but a few.*
- **Cultural** – *there is a variety of cultural opportunities to meet the interests of a broad spectrum of tastes. In particular, there are fine examples of local art, poetry and literature. The Snape Maltings is an example of a unique opportunity to experience the conversion of a maltings into a fine period concert hall. Here those interested in absorbing fine music can gather and those interested in developing their talent can grow. An example of the area's cultural depth is the Aldeburgh citizenship of Benjamin Britten.*
- **Historical** – *the area is rich in history especially as it pertains to coastal military defence and maritime commerce. The team discovered that from one place a continuum of coastal military defence persists at the time of Norman occupation through to the modern age. From the Orford Castle which was placed there to defend a seaport in the twelfth century one can view the Martello towers of the Napoleonic period, World War II bunkers and facilities constructed to develop atomic weapon components (3.2).*

**2.3** The Rivers Alde & Ore are unusually organized. [See Chapter 4]. Whilst the Crown owns the river bed upstream of Piggpail Sluice, New Orford Town Trust, a registered charity, actually owns the riverbed downstream to the river entrance at Shingle Street and has over many generations derived substantial revenues from this source. The River Ore has thus wound its ways irrevocably into the social, economic and physical fabric of the parish of Orford and indeed literally underwritten much of its infrastructure.

Moreover, although the rivers pass through several parish boundaries, public access to navigating them is limited to the slipways at Orford and Slaughden Quays and from the sea. Other launching areas are privately controlled by riparian owners/occupiers. This in turn means that numbers of users could be monitored and restricted if required.

## 2.4 Demographic

Major problems have been encountered in determining an accurate population total for FOTRsa. Traditional decennial Census sources have used parish boundaries, the most recent of these being that of 1991 (see below). These are then updated between Censuses through estimating procedures, mostly through comparing the balances of births and deaths and electoral registration returns but taking little account, for example, of migration balances. Table 4 illustrates the results of this approach.

**Table 4 : Resident population estimates by parish, 1991, 1995, 1998, 2000**

### Resident population estimates (mid-year)

	1991	1995	1998	2000*
Aldeburgh	2,710	2,630	2,780	2,760
Boyton	150	160	180	160
Butley	180	170	160	160
Capel St Andrew	80	70	70	70
Chillesford	140	100	120	120
Friston	360	350	340	340
Gedgrave	40	40	50	40
Hollesley	1,160	1,210	1,360	1,350
Iken	110	110	130	110
Orford	680	710	710	710
Snape	620	620	650	650
Sudbourne	340	320	300	300
Tunstall	510	490	530	540
Wantisden	40	30	30	40
Total	7,120	7,010	7,410	7,350

+3.2% (1991-2000)

Source: [www.suffolkcoastal.gov.uk](http://www.suffolkcoastal.gov.uk) 24Feb 2003

\* 2001 Census parish data not available until October 2003

This data suggests that FOTRsa is experiencing slow overall growth and its population is becoming increasingly concentrated into its larger centres of Aldeburgh, Hollesley, Orford and Snape.

Data from the most recent decennial Census, that of 2001, is available only at Ward level, the re-working of which at parish level is not yet available. In FOTRsa, the old parish of Aldeburgh alone now ranks as a ward; Orford Ward consists of the parishes of Orford, Gedgrave, Iken and Sudbourne; Hollesley Ward includes the parishes of

Hollesley, Boyton, Butley, Capel St Andrew and Wantisden; while the remaining parishes of Chillesford, Friston, Snape and Tunstall form part of larger wards with parishes beyond the boundaries of FOTRsa. Only three Census wards, namely Aldeburgh (3,538 People), Hollesley with Eyke (2,314), and Orford and Tunstall (1,855) fall completely within the designated boundaries of FOTRsa. In addition, Rendlesham (1,977) and Snape (1,914) Wards, fall partly within FOTRsa. We estimate that there is a population of 11,598 in FOTRsa and is very different from the 7,350 of Table 4. So until the 2001 Census data at the parish level is published, we are regarding population data with considerable caution.

Household numbers from the 2001 Census data total 5,113 for the above five Census Wards. This provides an average of 2.27 persons per household when divided into the above population total of 11,598.

## **2.5 Employment**

Employment data is impossible to obtain for the designated area of the FOTRsa. There are a number of reasons for this. First, Census data is published for wards rather than parishes. In FOTRsa, the old parish of Aldeburgh alone now ranks as a ward; Orford Ward consists of the parishes of Orford, Gedgrave, Iken and Sudbourne; Hollesley Ward includes the parishes of Hollesley, Boyton, Butley, Capel St Andrew and Wantisden; while the remaining parishes of Chillesford, Friston, Snape and Tunstall form part of larger wards with parishes beyond the boundaries of FOTRsa. Secondly, a second principal source of employment data is the Annual Employment Survey in which the lowest spatial data scale is Suffolk Coastal District. This may be accessed through the NOMIS system but there are major inconsistencies in the data – for example, the 1995 figure for persons employed in agriculture was 65 (41 males and 24 females) while for the latest data year of 2000 it was 1,983 (1,429 males and 554 females). Thirdly, most data refers only to recorded employees in employment and it is impossible to obtain additional figures for the self-employed and for those who travel out of the area to find employment. Thirdly, data from the 1991 decennial Census is woefully out of date while that from the 2001 Census is not available at the parish level. However, data is available for the three wards which fall within the designated area of FOTRsa (Table 5):

**Table 5: People aged 16-74 in employment, 2001 by ward**

<u>Empl type</u>	<u>Aldeburgh</u>	<u>Hollesley</u>	<u>Orford</u>	<u>Employment type</u>	<u>Aldeburgh</u>	<u>Hollesley</u>	<u>Orford</u>
Ag/Hu/For	42	115	79	Trans/Stor/Comm	80	97	45
Fishing	12	0	7	Finan Intermed	27	15	20
Min/Quarr	0	0	0	Real Estate/Rent/	133	117	121
Manuf	120	89	84	Pub Adm/Defenc	38	158	33
Ele/Gas/Wa	50	14	11	Education	95	74	59
Const	107	64	66	Health/Soc Work	114	97	63
Wh/Ret	211	138	95	Other	117	62	61
Trde							
Veh Repair							
Hotel/Cater	156	56	76	<b><u>TOTAL</u></b>	<b><u>1,302</u></b>	<b><u>1,096</u></b>	<b><u>820</u></b>

Source: Table KS11, 2001 Census Ward Employment

As might be expected, Aldeburgh ward provides the principal focus for employment although, perhaps surprisingly, this is not significantly greater than Hollesley with Eyke ward. There are some unexpected totals – such as the employment in the prison in Hollesley ward or the high number in Real Estate/Renting and Business Activities in Orford Ward.

Unemployment in FOTRsa is extremely low (Table 6) and what little there is can be regarded as frictional (i.e. people between jobs) rather than structural unemployment:

**Table 6: Unemployment by Ward, 2001 and 2003**

<b>Ward</b>	<b>December 2001</b>		<b>December 2003</b>	
	<b>Persons Unemployed</b>	<b>% rate</b>	<b>Persons unemployed</b>	<b>% rate</b>
Aldeburgh	12	1.2	14	1.4
Hollesley	12	1.7	20	2.9
Orford	4	0.7	9	1.5

### **3. DESK STUDY OF KEY PLANNING and POLICY DOCUMENTS**

This desk study of recommended research documents (see Appendix 1) has a primary emphasis upon economic fields but also draws upon environmental aspects when of relevance. It provides summaries, relevant information, conclusions, policy and planning proposals in both economic and environmental fields from a wide range of planning policy documents which have relevance to and impact upon the FOTRsa.

The section is divided into themed policy areas:

**3.1 FOTRsa and the wider context of sustainable development**

**3.2 Economic contexts at Regional, County and Local planning levels**

**3.3 The role of tourism**

**3.4 Environmental contexts at Regional, County and local planning levels**

**3.5 Aspects of Economic and environmental relationships**

**3.6 A Partnership approach to merged socio-economic and environmental planning**

### 3.1 FOTRsa and the wider context of sustainable development

- The single paramount theme which runs through almost all economic and environmental documentation reviewed in this section is that of ‘sustainability’

FOTRsa nests at the base of a hierarchical system of policies and planning. At the highest level are the two key *global* decisions of 1987 and 1992. The *World Commission of Environment and Development* (1987) identified the need for all planning, development and change to consider the implications of sustainable development. This it defined as “*Development that meets the needs of the present without compromising the ability of future generations to meet their own needs*”.

Sustainable development is concerned with

- (a) *development that respects the obligation to conserve and enhance the natural resource base;*
- (b) *an administrative system that secures effective citizen participation in decision making;*
- (c) *merging environment and economics in decision making;*
- (d) *the fair access to quality of life and environment for all social groups (Suffolk County Structure Plan 2001).*

This global perspective was linked to the local in 1992 (see below).

*Nation states* provide the second level of this hierarchy. The national government of the United Kingdom published *Sustainable Development: the UK Strategy* (1994) which required national, regional and local development plans to incorporate the above principles.

*Regions* provide the third strategy level and, here, the East of England Development Agency (*EEDA, 2001*) provides an ‘umbrella’ role for FOTRsa. While this is one of the UK’s strongest economic performing regions (ranked 10<sup>th</sup>), it is ranked only 34<sup>th</sup> out of 77 EU regions in terms of GDP per capita. A number of complementary strategies have been produced covering regional planning guidance, transportation, sustainable development, culture and Europe.

The Suffolk **County** Structure Plan (2001) provides the fourth level of this hierarchy but begins by putting its policies firmly within the 1987 and 1992 global initiatives noted above. It identifies two Strategic Aims and defines 32 objectives for the Plan.

***Strategic Aim 1***

*will be to sustain and enhance the health, quality and integrity of the built and natural environment, and to ensure that the overall aim of development does not result in material damage to critical environmental resources.*

***Strategic Aim 2***

*To an extent and in a manner consistent with Strategic Aim 1 the Structure Plan will:*

- (a) Promote a healthy economy*
- (b) Provide for leisure and social needs*

Finally, at the fifth level of the hierarchy is Suffolk Coastal District's ***Local Plan*** (2001). The global perspective was linked to the local when ***The Earth Summit in Rio*** (1992) called upon Local Authorities to initiate ***Local Agenda 21*** processes to deliver sustainable development. As a result, the District Plan

*has been prepared with a view to striking an appropriate balance between the need for growth and the need to conserve the unique environment of the District' (iii, p.1.).*

In short at every strategic planning level from the global to the local, policies must be prepared, interpreted and executed with an appropriate balance between socio-economic and environmental issues.

### **3.2 Economic contexts at Regional, County and District levels**

This Section again adopts a hierarchical framework to identifying, summarizing and analyzing key economic issues which impact upon FOTRsa.

***a) Regional***

FOTRsa economy falls within the overview of a number of government and quasi-government agencies of which, for the purposes of this report, the most important are the East of England Development Agency (EEDA) and the East of England Tourist Board (EETB).

In its ***Regional Economic Strategy*** (2001), the East of England Development Agency (EEDA) has a vision

*to make the east of England a world-class economy, renowned for its knowledge base, the creativity and enterprise of its people and the quality of life of all who live and work here (p.2)*

and to place it in the top 20 wealthiest European regions by 2010 (as noted in the previous section, it is currently ranked 34<sup>th</sup> in Europe). To achieve this, it has identified six major themes for economic growth:

- competitive businesses and organizations for a world-class region
- creativity, innovation and enterprise
- ‘invest in success’ wherever it is found
- regeneration plus – supporting our people and communities
- a clear identity and international profile
- leading-edge infrastructure and high-quality environment (p.6)

EEDA has also published an important study on the *Region’s Infrastructure* (2000). The study includes transport, telecommunications, development land for industry, commerce and housing, and major capital items such as hospitals and tertiary education. The study categorized the region into three types:

- declining, static or low growth areas, including remote/rural/coastal areas such as coastal Suffolk in which FOTRsa is located,
- high growth areas, and
- areas with high economic dependency on other areas - again relevant, at least in part, to FOTRsa.

Priorities for action within *the rural areas* of EEDA, including much of FOTRsa, have been highlighted in a *CRE (2002)* report, commissioned to examine key issues currently affecting rural areas, identify future scenarios, and suggest priority actions for practical delivery by RDAs. It notes that the fortunes of England’s rural areas are being shaped by a range of restructuring processes. These include international trade and European policy reforms, changes in economy and society, the development of new technologies, environmental pressures and changes in service provision. In addition, recent farming and food crises have impacted heavily upon key rural sectors. The Report portrays future scenarios for rural sectors in the fields of agriculture, tourism, other rural businesses, services and infrastructure; proceeds to discuss the challenges for rural development; and identifies a range of rural development priorities for RDAs.

#### ***b) County***

*The Suffolk Structure Plan 2001* begins with the national and regional contexts for the County’s development. It then specifies two Strategic Aims (noted above) before moving on to discuss environment, economy, transport, recreation/sport/leisure,

minerals and waste, and provides an environmental appraisal. Within the framework of the two Strategic Aims the Plan defines 32 objectives. In order to achieve Strategic Aim1 the control and promotion of development will need to:

- (a) protect and enhance natural assets, including the countryside, coast, wildlife, air and water;
- (b) increase the attraction of the towns as places to live and work.

Specific objectives relevant to the FOTRsa include measures designed:

1. to protect and enhance areas of recognized quality, including...Areas of Outstanding Natural Beauty (AONB), the Heritage Coast (HC) and Special Landscape Areas (SLA);
2. to minimize the impact of development on other landscapes, including towns and villages;
3. to protect and enhance important wildlife habitats;
4. to maintain and increase biodiversity;
5. to conserve water resources;
6. to locate new development only in areas not at risk from flooding;
7. to protect and enhance the quality of conservation areas; and
8. to minimize the impact of development on agriculture and forestry.

In order to achieve Strategic Aim 2 the key objectives relevant to the FOTRsa will need :

1. to enable the establishment, maintenance and expansion of employment uses;
2. to protect and improve the attraction, efficiency, vitality and functions of town, neighbourhood and village centers offering a range of community, shopping and employment opportunities.

The ***Suffolk Structure Plan*** notes that

*The value of the Suffolk countryside and coast as an economic, ecological, recreational, historical and aesthetic resource is widely acknowledged (6.10)*

### ***Socio-demographic issues***

Net inward migration provides the majority of the County's population growth. At the same time, its economy is restructuring away from agriculture, fishing, manufacturing and construction towards service and self-employment but, fortunately, unemployment is well below the national average. These trends will continue but will have additional internal dimensions of more part-time and fixed contract jobs, and more employment opportunities for women than men.

Although Suffolk has seen continued housing growth in villages, the Plan strengthens the emphasis on the role of medium-sized and smaller towns and larger villages in functioning as employment and service centers for their surrounding areas. Aldeburgh is identified as providing a focus for a wider hinterland (7.30) and under policy **ECON8**

*The ...vitality, viability and character of these (town and local) centers will be maintained and enhanced by:*

- (a) improving the quality and range of retailing facilities;*
- (b) providing for service, business, educational, leisure and residential uses;*
- (c) improving the environment and transport facilities through both public and private investment.*

**c) District**

Chapter 10 of the District Plan is devoted exclusively to the Deben Peninsula. In terms of **housing development** in settlements, Aldeburgh is identified as a very distinctive town under **POLICY AP26.....**

*In terms of the villages in the Deben Peninsula, infilling only will be allowed within Boyton, Butley, Chillesford and Sudbourne and infilling or a group of dwellings well related to their surroundings within the villages of Hollesley, Orford and Tunstall (10.7, p.208).*

The Local Plan gives special mention to the two Conservation Areas of Orford and Snape Maltings. Enhancement schemes will be encouraged for Market Square, Orford and Town Marsh car park, Orford. Snape Maltings, currently attracting ... (500,000 visitors a year) with its Concert Hall, School of Music, varied tourist attractions and its glorious riverside location, is a major visitor honeypot in the study area.

The FOTRsa also falls within the Suffolk Rural Priority Area of the EEDA and so is seen as suffering from rural disadvantage in the fields of employment, housing, transport and community facilities (4.10, p.64). The Council will support the retention and expansion of existing industry and services, where appropriate, will encourage new employment uses, and encourage employment diversification. Retail employment is seen as important in Aldeburgh and this will be further supported (4.34-39, pp.71-73).

### 3.3 The Role of Tourism

The role of tourism in Eastern England and FOTRsa is the primary responsibility of the East of England Tourist Board (EETB). First, however, a quotation:

*“Tourism is now one of the five largest industries in the UK, accounting for 10 per cent of all consumer spending and one in five of all new jobs. While leisure time has increased by just five per cent between 1971 and 1996, leisure spending has grown by a massive 89 per cent in real terms. The pattern of domestic tourism is also changing in line with social and demographic trends. In 1988 short breaks (one to three nights) accounted for over half of all UK holidays and one third of holiday expenditure. Short breaks are expected to experience continued growth as more people take them in addition to a main holiday abroad. Activity and special interest holidays are another growing sector, currently accounting for one in five holidays. With over a quarter of all households now consisting of only one person, traditional family holidays are declining and more holidays are being taken outside the summer season.”*  
(Rayment et al, 2000, para 1.2)

The **EETB (2000)** report begins with a national UK tourism profile, and discusses tourism in the East of England. It examines market trends, gives a profile of visitors, of tourism activities and of tourism by counties. Visitors’ perceptions of the region are analysed as are its tourism assets and weaknesses. In outlining its strategic framework for tourism in the region, it provides its ‘vision’ through eight distinct aspects and, to help translate the vision into action, five key principles are identified. These are:

- partnership
- quality
- sustainability
- competitiveness, and
- accessibility and inclusion.

The County Structure Plan identifies and analyses key general trends, many of which replicate the findings of the above quotation of Rayment on tourism. It notes the principal assets which attract visitors to Suffolk (7.45) including, for FOTRsa:

- (a) the natural beauty and wildlife interest of the countryside and coast;
- (b) the architectural heritage of castles, churches and country houses; the high quality built environments; and historic/archaeological sites;
- (c) the cultural heritage exemplified by associations of.....Benjamin Britten with Snape and Aldeburgh;
- (d) “activity tourism” such as sailing, walking, cycling and horse riding.

Trends in visitor numbers have been gathered for the County as a whole (Table 1) :

**Table 1 : Visitor numbers to County Attractions**

<b>Season</b>	<b>Countryside</b>	<b>Cultural</b>	<b>Historical</b>	<b>Museums</b>
1995	205,246	104,651	77,454	21,078
1998	224,105	111,500	67,578	20,168
2000	166,300	125,000	46,004	18,844

*Source: Suffolk Coastal District Website*

The tourist industry forms an important part of the District's economy and detailed data shows both fluctuations and some worrying declines in three of the four categories in the above table. These may be due, in part, to the influences of weather but it is not easy to sustain constant figures, let alone increases, for many types of visitor attraction. One exception is Snape Maltings where the Concert Hall saw more visitors while the retail and food/beverage facilities also drew in visitors.

In the **County Structure Plan**, three specific tourism policies are identified. **ECON12** recognises the need to extend the tourist season and/or enhance the range of tourist attractions while under

**ECON14** *The development of tourist accommodation in the countryside...may be acceptable.....It will not however be appropriate:*  
*(b) adjoining the estuaries of the Suffolk Coast and Heaths AONB;*  
*(c) in the Heritage Coast.*

In the Recreation, Sport and Leisure section of the Structure Plan (Section 9), it is noted

**REC3** In the countryside.....

*(e) in the Broads, Heritage Coast, the estuaries of the Suffolk Coast and Heaths AONB..., small scale recreation facilities will be acceptable.....*

*(f)*

while in the section dealing with Waterborne Recreation

**REC4** *Development of new marinas and yacht harbours and associated facilities will be acceptable within towns, particularly on existing derelict, redundant or under-used water frontages, where there is no material conflict with residential amenity or with policies for transport or protection of the environment...*

The *East of England Tourist Board* has published two important studies (2000, 2002) which include the FOTRsa and which use the Cambridge Tourism Model. They are in almost identical format which makes it possible to compare the patterns, structures and changes for the two study years of 1998 and 2000. There is considerable detail and numerous tables/graphs/diagrams and data in them, but the principal findings are as follows. Two key aspects are considered (Tables 2 and 3):

**Table 2: The volume and value of tourism in Suffolk, 1998 and 2000**

		(£mill)	<u>1998</u> (%)	(£mill)	<u>2000</u> %
1 Overall value of tourism		123.3		142.4	
2 Of this, staying visitors		38.5	31%	52.9	37%
3 And, by day visitors		84.8	69%	89.5	63%
		<b>No trips</b>		<b>Mill nights</b>	<b>£mill expend</b>
4 Staying visitors	<b>1998</b>	343,000		1.35	38.5
	<b>2000</b>	498,000		1.7	52.9
5 Day visitors	<b>1998</b>	4,100,000		---	84.8
	<b>2000</b>	4,100,000		---	89.5

**Table 3: The impact of tourism expenditure in Suffolk, 1998 and 2000**

		<u>1998</u>	<u>2000</u>
1 Fulltime job equivalents from the above		2,414	2,788
2 of which, supported by direct expenditure		79%	79%
	by linkage	16%	17%
	by multiplier expenditure	5%	4%
3 by sector,	in catering	40%	38%
	in accommodation	20%	22%
	in retail	16%	14%
	in transport	5%	5%
	in attractions/entertainment	19%	21%
4 actual jobs created by tourism		3,389	3,906

In 1999 EETB with EEDA developed through extensive consultation, a **Regional Tourism Strategy**. It presents an analysis of tourism trends, the region's tourism profile and performance, and the economic and policy context. It sets out a strategic

framework for action, based on five key, interlinked principles: partnership, quality, sustainability, competitiveness and accessibility.

## **b District**

Within Suffolk Coastal DC there is no tourism data which is specific to FOTRsa as a whole but there is information (Table 7) relating to the following selected individual attractions.

**Table 7: Visitor attractions 2001, 2002**

<b>Attraction</b>	<b>No. of visitors in 2001 season</b>	<b>No. of visitors in 2002 season</b>
<b><i>Boat trips &amp; Hire</i></b>		
Lady Florence River Cruises (Orford)	4,300 E	5,370 E
<b><i>Cinemas, Concert Halls, Theatres</i></b>		
Aldeburgh Cinema	32,000 E	35,000 E
Snape Maltings Concert Hall*	72,000 A	70,000 A
<b><i>Countryside</i></b>		
Havergate Island	625 A	625 A
Orford Ness	3,615 A	4,112 A
Iken Cliff Picnic	26,541 A	16,000 E
<b><i>Crafts, Potteries, Antiques</i></b>		
Butley Barns	7,500-12,000 E	7,000-12,000 E
Snape Maltings Riverside Centre	550,000 E	600,000E
<b><i>Golf Courses</i></b>		
Aldeburgh Golf Club	6,550 E	6,550 E
<b><i>Historic Houses etc</i></b>		
Orford Castle	22,974 E	25,920 A
<b><i>Museums</i></b>		
Moot Hall Museum, Aldeburgh	7,710 A	7,593 A

*Source: VAD/EMM/02/01/2002m: TICS Visitors to Suffolk Coastal*

\*A specific study of the **economic, social and cultural impact of Aldeburgh Productions** was carried out in 2001 (Aldeburgh 2002) and details are provided in Section 4.2 below.

### 3.4. Environmental contexts at Regional ,County and District levels

#### a) County

The “Dedham Vale and the Suffolk Coast and Heaths are designated as an AONB. In addition, 57km of coastline and adjacent land have been defined as Heritage Coast” (6.26). In addition, the Special Landscape Area of the Upper Deben, Ore and Alde Valleys is identified (6.32) where “Development will not be acceptable which would have a material adverse impact..(unless there is)..an overriding national or local need for development...”(ENV8). In its policy concerning flood protection, the Plan is guided by the Environment Agency on areas at risk from flooding. Here, under

**ENV14**        *Development will not be acceptable if it would impede materially the flow or storage of floodwater, increase the risk of flooding elsewhere or increase the number of people or properties at risk of flooding.*

Finally, reference is made to sea defences and embanked watercourses and, here, the Environment Agency “...has prepared shoreline management plans setting down strategies for sea defence” (6.56).

The Orfordness to Shingle Street Special Area of Conservation (SAC) includes both marine areas (i.e. land covered continuously or intermittently by tidal waters) and land which is not subject to tidal influence. The marine part of the SAC is termed a European marine site which

*has been chosen to reflect the more constant occurrence of the vegetation in association with larger, more stable areas of stony banks... the annual vegetation occurs on the shingle lying at or above mean high water spring tides.*

*The spit of Orfordness is composed of a series of ridges which have been deposited almost parallel to the coast and have resulted in the formation of an extensive area of stable shingle fringed by a dynamic coastal ridge. The area is in dynamic equilibrium with cycles of accretion and erosion...The vegetation of the coastal ridges is ephemeral, composed of annual or short-lived perennial species...Species are also tolerant of saltwater inundation..This area of annual vegetation of drift lines is one of only four outstanding localities in the UK...and has been subject to relatively little human modification... (English Nature, 2001, p.16-17)*

## b) District

Amongst the fundamental and common themes included in *The Suffolk Coastal Local Plan (2001)* (vii, p.2.) are:

- 1 the need to consider all proposals against the principles of sustainable development;
- 2 the need to protect the Countryside.
- 3 the need for special control in sensitive areas, such as AONB, SLA, and Conservation Areas (CA);
- 4 the provision of designated areas, wildlife habitats, vulnerable species, and sites of archaeological importance;
- 5 the need to protect the best and most versatile agricultural land;
- 6 the protection and enhancement of the rural economy...;
- 7 the protection of the vitality and viability of town centres...;
- 8 the need to encourage employment growth.

The attractive landscapes of the Peninsula are recognized and, in particular, under **POLICY AP163** all proposals for development on Orfordness and Havergate Island will be resisted. In the FOTRsa the AONB designation includes the estuaries of the Alde, Ore and Butley while the SLA includes the valleys of the River Alde and Ore together with their tributaries. Under **POLICY AP13 Special Landscape Areas** of the District Plan

*The valleys and tributaries of the Rivers Alde....Ore..are designated as SLAs... The District Council will ensure that no development will take place which will be to the material detriment of, or materially detract from, the special landscape.*

Finally, in the section on water recreation the Local Plan notes that

*The large numbers of moorings on the estuaries is also of concern.....on the Deben, Ore and Alde where there is a threat to ecology. The District Council would support initiatives to rationalize and manage the location and number of moorings on the estuaries in the District (7.49, p.147).*

## c) Regional

The publication *of the Suffolk Estuarine (Flood Management) Strategy for the Rivers Alde/Ore* (Posford Duvivier for the Environment Agency 1999) provides the key document relating to local estuarine issues and proposals for the next half century.

It notes that

*Pressures on the estuaries have increased. There is a greater appreciation of the value of the natural environment, reflected in international and national legislation. There is increased use of the estuaries for recreation and sport, and coupled to this a greater reliance of local economies on this use and the tourism it generates (1.5, p.3).*

Implicit throughout the study is the impact of changes in sea-levels which require the development of a long-term, high level, defence policy to provide an essential framework for the future physical management of each estuary (1.1, p.1). It begins with a general description of the strategy area and detailed descriptions of the eight distinctive sections of the estuary. It then discusses the four physical parameters of river inflow, water level, tidal volume and their interaction with the coastal region and notes that

*the use of the estuary, the activities it supports and the important environmental and economic interests within the estuary is at present reasonably in balance... (and)..the present regime of the estuary has achieved a relative balance with the coastal processes such that coastal processes of sediment drift are maintained' (2.2).*

However, there are indications that this delicate balance may be in the process of being disrupted and the loss of salt marsh, either due to actual change in sea level or due to increased river flow rates, may reflect this. The result is that there are areas of sea defence becoming more costly to maintain and so

*The problem now is the increased expenditure on defence in certain specific locations and the uncertainty as to future defence policy in areas where there is no apparent local economic justification for maintenance of defences (2.2).*

The Report provides a concise description of the three principal environments of the Estuary. In the context of the **Human and Built Environment** it discusses land use, residential development and industry, recreation and tourism, commercial and recreational fishing, agriculture and forestry, historic and archaeological heritage, and water quality. In the **Natural Environment** section it discusses geology and geomorphology and landscape while under **Habitats and Species** it looks at saltmarsh and mudflats, vegetated shingle, saline regions, grazing marsh, reedbeds, and conservation designations.

It argues that any strategy for the Estuary should aim to produce

*a sustainable and balanced framework for the future management of the estuary as a whole, reflecting natural processes, planning pressures, current and future land use, flood defence needs, and environmental issues*

To achieve this, it argues that a balance must be struck and the key factors are that:

- The volume increase of the estuary must be controlled;
- The pressures, both man made and natural, on the environment must be recognized and a balanced and adequate habitat resource must be built into the strategy in a sustainable manner; and
- The significant social, cultural and economic value of the estuary must be maintained. (5.3.1).

The report concludes with the outlining of six strategy options (5.3.3):

- S1. **Do Nothing throughout the estuary.** (This provides the economic baseline for the comparison of other options).
- S2. **Hold the Line to every flood compartment.** (This option provides a baseline on defence costs).
- S3. **Strategic Hold the Line.** (This option removes clearly uneconomic flood compartments from the economic assessment but still defends areas which while not being justified economically may have a significant strategic impact on the estuary. This policy, with the exception of DO Nothing at the northern end of Sudbourne Marsh, reflects very much the thinking behind the present defence policy for the estuary).
- S4. **Minimise defence commitments.** (This option develops from Option S3, and considers alternative policies for areas which are not economically justifiable on an individual basis. This has the effect of increasing the Net Present Value over the estuary).
- S5. **Reduce Impact 1.** (This option examines how impacts may be reduced through a gradual reduction in the level of flood protection at Lantern and King's Marsh while still retreating the line at Aldeburgh).
- S6. **Reduce Impact 2.** (This option examines the converse of option S5, allowing King's Marsh to be abandoned while maintaining the defence at Aldeburgh).

In comparing the options (5.3.5), the Study concludes that neither **Do Nothing** (S1) nor **Hold the Line** (S2) throughout the estuary are realistic in meeting the aims of the Strategy. **Strategic Holding the Line** (S3) provides a better baseline for comparison than the normal Do Nothing baseline while Option S4 offers a more economically favourable approach from the perspective of the estuary. Option S6 is less economically advantageous in comparison with S5 and fails to

address the need to maintain the environmental balance of the estuary through creating the opportunity for habitat re-location. Therefore

**Option S5 is the preferred strategy** (5.3.5, p78). This:

*provides a better balance in terms of the environment, the economics and the impact on the coastal regime. There are several areas of uncertainty which would need to be addressed; some, such as the rate of sea level rise, the response of the estuary entrance and the actual cost of maintaining defences, would be best addressed through monitoring. Others, such as the detailed mechanism for retreating from areas such as Aldeburgh Marsh, or the possible need to re-create freshwater grazing marsh, would require specific detailed investigation. The option does. However, provide the basis of a sustainable strategy for the estuary believed to be in line with the aim to maintain with minimum dependency on defence the interests and use of the area.*

Complementing the above study is one by the **Coastal Geomorphic Partnership** (CGP) referring specifically to saltmarsh change within the Suffolk estuaries between 1971, 1986 and 1998 (CGP, 2000). In the Conclusions and Recommendations of its Executive Summary document (Section 5) it found

- *...that net erosion occurred in the Rivers Blyth, Alde/Ore (combined), Butley and Deben.*
- *...a total of 93ha of saltmarsh was lost, some 18 ha due to reclamation and 75ha due to erosion.*
- *The implications of this included:*
  - a. *the observed loss might affect the integrity of the internationally designated nature conservation sites in Suffolk,*
  - b. *there will be progressively less wave and tidal energy attenuation by natural means, enabling higher forces to be impacted directly on existing flood embankments. This is likely to cause increasing structural damage and require increasing maintenance commitments by the Environment Agency.*
- *.....it is recommended that current coastal management policies are re-considered in terms of both their long-term sustainability and their impact on the integrity of internationally designated sites.*

The relationships between nature conservation and wild birds in the FOTRsa are studied in a detailed report by **English Nature** in its **Alde-Ore Estuary European Marine Site Regulation 33 Advice 2001** (an obligation under the **EC Habitat Directive**) which looks at the Alde-Ore Estuary Special Protection Area (SPA) and the Orfordness to Shingle Street Special Area of Conservation (SAC). The former is important because of the presence of internationally important bird populations, and the latter because of its perennial vegetation of stony banks and lagoons which includes the key sub-features of shingle areas, shallow coastal waters, intertidal

mudflats and saltmarsh communities. The study provides advice to authorities with obligations under the EC Habitat Directive on operations for the SPA and suggests which management of human activities should avoid, including:

- physical loss of habitats from removal
- physical damage from abrasion
- bio-physical disturbance through noise and/or visual presence
- toxic contamination from synthetic and non-synthetic compounds
- non-toxic contamination through changes in nutrient and organic loading, and
- biological disturbance through the selective extraction of species.

The publication of this advice in 2001 meant that the Posford Duvivier study of 1999 did not take account of the EC Habitat Directive. This, together with local concerns regarding the continued navigability of the rivers and the impact of the proposed strategy upon the local economy prompted the formation of Friends of the Rivers (FOTR), and the commissioning of this study in 2001.

The **Environment Agency** is now embarking upon a longer term (100 year) strategy with the aid of Black & Veatch Consulting Ltd and currently undertaking a consultation process with a view to presenting an appraisal of their preferred option for the Alde-Ore Estuary in the summer of 2004.

As their introduction to the new strategy, published in October 2003, states:

*“The Alde and Ore Estuary is an important area for those who live and work there. It has ecological and landscape importance, and associated economic, social and amenity value for the local community and tourists alike.*

*It will be critical for the development of any flood management strategy to consider these varied interests and to try and reach a balance between them within the constraints of national policy and legislation.”*

Likewise, the **Shoreline Management Plan for Lowestoft to Harwich (SMP)** prepared in 1998 by the Environment Agency with Waveney and Suffolk Coastal District Councils is due for revision in the next few years and may be replaced by a new Shoreline Strategy Plan for Thorpeness to Harwich.

In 2002, **Suffolk Coasts & Heaths AONB Partnership** produced a **Management Strategy** in which it sets out a 30 year vision for the AONB, together with a series of

practical actions designed to help to deliver short term improvements. Although not a statutory plan, each AONB is nevertheless obliged to prepare one under the terms of the **Countryside and Rights of Way (CROW) Act 2000**. Topics covered in the Strategy include recreation and enjoyment, visitor management, flood defence, agriculture and transport. **The Suffolk Coasts & Heaths Unit** takes a lead in promoting good management in the area and is also charged with taking account of the economic and social needs of the local communities within the AONB.

In 1991, the **Countryside Commission**, in re-stating the purpose of designating [areas as AONBs] stated “ *account should be taken of the needs of agriculture, forestry, other rural industries and of the economic and social needs of local communities.*”

*...recreation is not an objective of designation but the demand for recreation should be met so far as this is consistent with the conservation of natural beauty and the needs of agriculture, forestry and other uses.”*

In Spring 2003 **English Nature and the Environment Agency** developed for Suffolk one of six pilot **Coastal Habitat Management Plans (CHaMPs)**. Intended to provide a framework for managing European and Ramsar site complexes (such as the FOTRsa) located on or adjacent to dynamic coastlines, the CHaMP (which is not statutory) will act as an accounting system to record and predict losses and gains to habitat, and to set the direction for habitat conservation measures to address net losses and so inform the planning of, national, local government and other bodies and businesses.

Available information has been used to predict geomorphological change and the likely shoreline changes over the next 50 years, taking into account predicted climate changes and sea level rise over the study time-period.

*“the overall prediction for the Alde-Ore system is that the designated internationally important features cannot be retained in their existing extent and distribution either by intervention or by allowing the natural systems of the estuary to continue. Allowing ‘natural’ change to occur could have significant consequences with respect to the entire morphology of the estuary and its associated habitats and socio-economic*

*interests. While significant gains in intertidal habitats could be realized, the overall change is of such a scale that it would be difficult to justify”*

The study then considers a number of alternative defence scenarios and overall approaches to the management of the estuary the stated objective of which is to allow ‘a more controlled and adaptive approach’ to be taken.

It is considered inevitable that there will be change to Orfordness and in order prevent significant disruption to the rest of the estuary system and manage the change by maintaining the line and integrity of the estuary defences to Kings and Lantern Marshes, but make no attempt to raise their level, in effect lowering their level as sea level rise occurs.

*“this would allow, gradually, more frequent tidal inundation from extreme events over the next 50 years. A similar attitude would be taken to the seaward defence... in the face of sea level rise. The longer term intent of this approach would be to allow movement to a saline dominated environment, over the next 50 to 100 years, which would minimize the need for future intervention.”*

The report identifies areas for potential habitat creation, elsewhere within the FOTRsa and elsewhere within the Suffolk CHaMP area and , to offset predicted losses of freshwater and brackish habitats, notes that if necessary some of the intertidal requirement (saltmarsh) could be created in the Essex CHaMP area.

**The loss of freshwater and brackish habitats has of course significant implications for agriculture in the FOTRsa, and these are discussed in detail in Section 4.**

### 3.4 Aspects of environmental and economic relationships

As noted above, the World Commission of Environment and Development (1987) noted that sustainable development is concerned with **merging environment and economics in decision making**.

In recent years a number of studies have been made between environmental and economic relationships and the RSPB has been particularly active in this field. Five of their studies, all authored or co-authored by Rayment, are referred to below.

The first *Nature Conservation, Employment and Local Economies* (1995) examined the employment potential and local impact of nature conservation policies, beginning with an impressive literature review. It argued that nature and landscape conservation provided a significant and growing sector of the national economy, generating over 10,000 fulltime equivalent jobs in Britain in 1991/2, with typical estimates that conservation supported four to six times as many jobs by attracting visitors to rural areas than it employed directly. In addition, 'further employment is provided in peripheral activities such as museums, zoos, manufacture of optical goods and publishing' (p2). Further, conservation work 'often requires specialist skills and experience which are not always available among local people. There is therefore scope to increase the local employment impact of conservation measures through enhanced training' (p2). Visitor spending was also examined and the study of Orkney, for example, showed that 11% of tourist expenditure was associated with visits to wildlife sites. Related to visitor spending was the degree of leakage from local economies with smaller accommodation establishments tending to generate higher multipliers than hotels, rural locations generating more than non-rural, and green tourism often producing a larger local multiplier effect. Literature reviews revealed that in Scotland 'typically £1 of expenditure by visitors generates total expenditure of £1.20-1.35 and wages, salaries and profits of £0.25-0.40 in the local economy. One local job is created per £20-25,000 of expenditure by visitors. For every person employed directly in nature conservation, their wages are likely to create a further 0.2-0.25 extra jobs in the local economy' (p.3-4).

Rayment's 1997 study *Working with Nature in Britain* takes forward the findings of the above work. It examines 'in more detail the role which conservation plays in local economies on different parts of Britain, focusing particularly on the effects of conservation policies and activities on employment. The eight case studies throughout the UK (but none in or near the FOTR study area) identify opportunities and constraints to job creation through nature conservation, and suggest policy changes which will have both employment and conservation benefits. Finally, eight common themes and issues are identified:

- a. nature conservation activities can and do create jobs;
- b. the benefits to local economies are widespread;
- c. the jobs resulting from conservation activities are varied;
- d. public sector financial support is needed to maintain projects which provide conservation and employment benefits;
- e. conservation can greatly benefit the tourism industry by attracting visitors to rural areas and by helping to extend the season;
- f. support for training, advice about land management and assistance with product processing and marketing are often necessary to add value to conservation schemes and maximize the benefits to local economies;
- g. conflicts between different rural policies are often an obstacle to conservation activities and schemes; and
- h. there are opportunities for new job creation through restoration and management of heathlands, derelict coppice and other existing woodlands, and better management of agricultural habitats.

The RSPB manages more than 150 nature reserves in the UK and in 1998 published *Spending by Visitors to RSPB Reserves*. Self-administered questionnaires were issued in twenty and amongst the key findings were that:

- a. 38% of visitors were on holiday, 30% lived locally and 26% were on a day trip;
- b. 44% stayed 4-7 nights, 36% 1-3 nights, and 14% 8-14 nights;
- c. 28% of parties bought meals, 27% had drinks in pub/café and 27% bought petrol; 25% bought food from local shops and 20% were staying locally.

The assumed daily expenditure per visitor in 1998 on different items was: Accommodation £20, Petrol £7, Meals £5, drinks/food from shop and other items £3 each. Using these estimates, visitor expenditure in RSPB reserves in 1998 totalled £10.1 millions in 1998. Specific details for the three 'local' RSPB sites to FOTR study area:

**Table 8: Estimated Local Expenditures by Visitors to Suffolk/ Norfolk RSPB Reserves(£000)**

Reserve	Petrol	Accomm- odation	Drinks in Pub/café	Meals	Food from Shop	Other items	Total
Minsmere	138.5	395.8	69.6	122.8	57.3	61.4	845.6
Snettisham	5.1	15.1	2.2	2.8	2.3	1.5	28.8
Titchwell	298.9	1019.0	161.1	268.5	136.3	152.8	2036.6

(Source: Abstracted from Table 6, p8)

The most detailed, in-depth case study by the RSPB is *Valuing Norfolk's Coast – the Economic benefits of Environmental and Wildlife Tourism* (2000). The geographical area chosen stretched from Snettisham on the Wash to Weybourne in the east and up to 5 miles inland from the coast. Surveys were carried out in six nature reserve sites within this designated zone, viz:

- Blakeney Quay (est 14,000 visitors in 1999)
- Cley Marshes (est 100,000 visitors)
- Lady Anne's Drive, Holkham (est 110,000 visitors)
- Morston Quay (est 140,000 visitors)
- Snettisham Beach (est 41,000 visitors)
- Titchwell Marsh (est 135,000 visitors)

The key findings in the summary (3.11) of the impact of tourism relating to the study area and the six sites were:

- Visitor spending in the Study Area totaled £51 millions in 1999;
- Visitor spending in the Six Sites totaled £21 millions;
- Spending by visitors to the Six Sites attracted mainly by the area's birds and wildlife totalled £6.2 millions;
- And to the scenery and landscape totaled £2.7 millions;
- Visitor spending in the Study Area supported 3,266 actual or 2,325 FTE jobs;
- And to the Six Sites supported 620 actual or 442 FTE jobs;
- Visitors to view the birds and scenery supported 189 actual and 135 FTE jobs;
- And by scenery and landscape supported 82 actual and 59 FTE jobs.

The most recent RSPB report *Conservation Works....for local economies in the UK* (2001), argues that nature conservation benefits rural economies in a number of different ways:

- a. **direct employment** – estimated to total 18,000 full time jobs;
- b. **expenditures by conservation organizations** – providing local revenues and employment
- c. **conservation schemes** – which fund work, supporty incomes and employment;
- d. **the tourism sector** – where conservation activities attract visitors who spend money on local goods and services.

This report contains details of eleven local case studies of which two are of relevance to the FOTR study. Their summary conclusions are reproduced verbatim.

### **Minsmere RSPB Reserve and the Local Economy**

*Minsmere RSPB Reserve lies on the Suffolk coast between Felixstowe and Lowestoft. It has a variety of habitats, is rich in biodiversity, and receives almost 80,000 visitors per year. Based on a survey of visitors in 2000, we estimate that the reserve attracts tourism expenditure of £1.1 million per year into the local economy, supporting an estimated 27.5 Full Time Equivalent (FTE) tourism jobs. Direct employment on the reserve totals 20 FTE jobs. A survey of local businesses revealed a general recognition of these benefits, but also some concern about the environmental impact of tourism locally. The study emphasized the need to manage the environmental impact of reserve visiting, and suggested that further efforts should be made to spread visits more evenly across the year.*

### **Valuing Norfolk's Coast**

*A study of visitors to six sites on the Norfolk coast in 1999 estimated that they spent £21 million per year in the local economy. Visitors attracted to these sites mainly by their birds and wildlife were estimated to have spent a total of £6 million in the areas, supporting an estimated 135 FTE jobs. The Norfolk Wildlife's Trust's Cley Reserve and Titchwell RSPB reserve were estimated to bring extra visitor spending of £2.5 million and £1.8 million respectively into the Norfolk coastal economy in 1999. In addition, work by conservation organizations in managing sites in Norfolk's coast area supports 30 FTE jobs. The study identified a series of challenges for the management of Norfolk's coastal environment and the tourism that depends on it. These include maintaining the extent and quality of internationally important wildlife habitats in the face of sea level rise, reducing the environmental impact of traffic, ensuring that tourism benefits local communities, and managing the pressure of increasing visitor numbers.*

### **3.6 A Partnership Approach to merged socio-economic and environmental planning**

In 2002, following the commencement of this study, there was a visit to the FOTRsa by a team of US and UK experts selected from countryside and other management backgrounds formed under the auspices of the *US/UK Countryside Exchange* under the guidance of a local organizing committee. Their report identified key issues primarily to do with promoting better communications, and therefore mutual confidence between stakeholders, statutory bodies and decision makers.

It recommended the creation of an **Estuary Planning Partnership (EPP)** to serve all interests, serve as a communications forum and, as a priority, guide the process of creating an Estuary Strategic Plan. In 2003 the local organizing committee for the Exchange formed a steering group to develop proposals for an EPP and this is to be launched in early 2004.

The Exchange report further recommended that local authorities and others give priority to planning and funding affordable housing, that ways of providing better transport facilities and securing or providing retail outlets for basic supplies be explored, and finally that partnerships should be used to match and develop labour force skills, making better use of local entrepreneurial skills, taking advantage of the built and natural environmental assets of the area.

