

Economic Appraisal (Detailed Planning Application) **THE EDGE, GREAT YARMOUTH**



Economic Appraisal Report for
'The Edge' Mixed-Use Leisure Complex
Vacant Land South of Great
Yarmouth Pleasure Beach, South
Beach Parade, Great Yarmouth

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1 Introduction

Introduction

- 1.1 This report appraises the economic and social background to the proposed development. It draws to a certain extent on material already submitted by RPS, but adds information in greater depth from the 2001 Census and more up to date sources where appropriate. The proposed development consists of a multiplex cinema (8-10 screens), 20-22 lane ten pin bowling, a 180 bed hotel, 6-8 restaurants, a 'large' casino (as defined by the Gambling Act 2005) and multi-storey car parking. It is fully described in the Planning Supporting Statement, which also assesses its degree of compliance with planning guidance and policy.
- 1.2 A list of references forms Appendix 1, and Appendices 2 comprises a series of tables of figures.

2 Economic and Social Background

Introduction

- 2.1 This section contains RPS's analysis of primary and secondary data sources before going on in Section 3 to consider material published by the Borough Council. In this context, 'primary' means the 2001 Census. 'Secondary' includes the NOMIS Labour Market Profiles, as these provide summary data in convenient form rather than large quantities of raw data.
- 2.2 It considers the issues raised by a significant piece of research on Britain's coastal towns carried out by Sheffield Hallam University. One of its authors gave oral evidence to the House of Commons Communities and Local Government Committee, whose Second Report of Session 2006-2007 on coastal towns, and the Government's response to it, are also referred to.

'The Seaside Economy'

- 2.3 The Centre for Regional Economic and Social Research at Sheffield Hallam University (SHU) published a report entitled The Seaside Economy in 2003. It provided a profile of and examined trends in Britain's 43 principal seaside towns in the period 1971-2001.
- 2.4 At the outset it must be acknowledged that the study has been criticised for painting what was regarded by some as too optimistic a picture of conditions in and the prospects for some of the coastal towns. Nevertheless, RPS's own view is that the more straightforward analysis in this report is not capable of wide interpretation. In particular, it showed that Great Yarmouth was the worst performing town in terms of claimant unemployment, and was also the worst in terms of SHU's widely accepted measures of hidden unemployment. More detail is given below, and SHU's interpretation and analysis is also referred to under other topic headings.

Population

- 2.5 Great Yarmouth Borough has a population of 93,400 (ONS mid year estimate 2006). The population of the town itself was estimated by SHU as 53,800 (2001). The remainder is concentrated in coastal settlements to the north such as Caister on Sea and Hemsby, and in larger villages such as Martham and Belton.
- 2.6 Working age population in 2006 is estimated at 54,400, at 58% of the total population slightly lower than for the region (61%) and Great Britain (62%).

Economic Activity

- 2.7 Of the 54,400, 40,600 (72.6%) are considered economically active, compared to about 80% in the region and 78.5% in Great Britain. The Government's Response notes that Great Yarmouth had in 2006 the lowest employment rate (similar but not identical to the economic activity rate) of all the coastal towns, at 69.2%, but had shown the greatest improvement since 1997. [It also notes in the following paragraph that employment grew by 30% in Great Yarmouth between 1997 and 2006].
- 2.8 There is a bigger percentage point gap between the Great Yarmouth and national activity rates for men (75.6%; 83.3%) than for women (69.3%; 73.4%).
- 2.9 The Labour Market Profiles also present data for the economically inactive. The total of 14,400 for Great Yarmouth represented 27.4% of the working age population, compared with 19.6% in the region and 21.3% nationally. A far greater proportion (6,300 out of 6,700, or 91%) of men were described as "not wanting a job" than women (5,100 out of 7,700, or 66%).

Employment

- 2.10 The figures for occupational groups presented in the Labour Market Profile show differences in occupational structure between the Borough and the country as a whole. The principal differences are:
- 2.11 25.2% of people in Great Yarmouth are in Groups 1-3 (managers and senior officials, professional occupations, and associate professional and technical), compared with 42.3% in Great Britain
- 2.12 17.2% in Great Yarmouth are in skilled trades (Group 5) compared with 10.9% in Great Britain
- 2.13 30.8% in Great Yarmouth are in Groups 8 and 9 (process plant and machine operatives, elementary occupations), compared with 18.6% in Great Britain.

Employment in Tourism

- 2.14 Data for Great Yarmouth and seven other districts containing coastal towns are set out in Table 1 in Appendix 2. The seven others were selected from the 43 identified by SHU on the basis of the population of the towns being similar, or a reasonable fit between the town and the whole district. The employment in tourism category cuts across some of the broad categories of SIC92 (the current standard industrial classification), but uses a consistent definition based on eight sectors starting with 551 (hotels) and 552 (camping sites etc).
- 2.15 It should also be noted that the Labour Market Profiles provide figures for employment in tourism for all districts, not just coastal towns, and in many cases the figures for inland districts fall not far short of those for coastal towns.

- 2.16 The figures show that 6,400 jobs in Great Yarmouth were defined as being in tourism, out of a total of 37,000 employee jobs. The percentage of 18.5% is at the higher end of the range, slightly higher figures still being observed in Scarborough and Weymouth.

Qualifications

- 2.17 Data from the ONS annual population survey for Great Yarmouth and the seven other districts are presented in Table 2 in Appendix 2. The percentages are cumulative; in other words, the figure for NVQ3 and above includes NVQ4 and above. NVQ4 means degree standard, and NVQ3 is equivalent to 2 'A' levels.
- 2.18 The most striking feature of the table is the very low percentage (9.8%) of the resident population with qualifications at NVQ4 equivalent or above, barely more than a third of the national figure of 27%, and lower than for any of the other coastal areas for which data are presented. This percentage is so surprisingly low that corroboration was sought from Table UV24 of the 2001 Census – in which the figure was 8.9%.
- 2.19 At NVQ3 level, the differences are less marked, although the percentage of people qualified to this level and above in Great Yarmouth is still significantly lower than for all other areas in the table except Tendring.
- 2.20 This raises the question of the level (rather than the precise nature) of qualifications required in the leisure industry, and the extent that the existing population in Great Yarmouth will be able to meet those requirements.

Earnings

- 2.21 Part (a) of Table 3 in Appendix 2 sets out data for earnings for Great Yarmouth, together with figures for the region and Great Britain, for both residence and workplace.
- 2.22 The figures show that earnings among residents of Great Yarmouth are lower than for the region and Great Britain. Men earn about 90% of the national average, and women less than three-quarters. In contrast, the workplace data show that the median earnings for men working in Great Yarmouth are higher than the national average. Although earnings for women working in Great Yarmouth are still less than the national average, the gap is significantly smaller.
- 2.23 The implication of this is that many of the higher paid jobs in Great Yarmouth, especially those held by men, are occupied by those living outside the Borough. Furthermore, the relatively small levels of interaction between Great Yarmouth and other areas revealed by the travel to work data (see below), and the fact that there is a modest net outflow of workers

from Great Yarmouth, implies that there may be a wide range of income levels among men working in the Borough.

- 2.24 Part (b) of the table compares residence and workplace earnings for men and women together, for Great Yarmouth and the seven other coastal districts. Great Yarmouth is the only district in which the workplace figure is higher than the residence figure. The residence figure is higher in four of the seven districts than in Great Yarmouth; but the workplace figure is higher in Great Yarmouth than any of the seven districts.

Unemployment and Benefit Claimants

- 2.25 The SHU study sets out unemployment rates for the 43 towns for claimant unemployment in January 2002, along with rates for the surrounding area, usually the county in which the town is located. The rate for Great Yarmouth was 10.3%, compared with the next highest of 7.8% (in Bridlington) and an average for all seaside towns of 4.2%. The rate for the surrounding area (in this case Norfolk) was 2.9%, or three and a half times less. The rate in the seaside towns as a whole was only 20% more than the national rate.
- 2.26 SHU's work on hidden unemployment covers not only the seaside towns but also the former coalfields, separately published. It defined 'real unemployment' and the claimant count plus for other categories; those unemployed under the International Labour Organisation (ILO) definition, people on Government schemes, claimants of sickness-related benefits (mainly incapacity benefit) and people taking early retirement. The third of these is by far the largest single category.
- 2.27 The results of this analysis again placed Great Yarmouth at the head of the table, with a level of real unemployment of 5,200 and a rate of 20%. Greater numbers were found; but in much larger towns such as Blackpool and Bournemouth, so that the real unemployment percentage rate was lower, often significantly so.
- 2.28 The December 2007 unemployment figures show that there were 1705 men (6.0%) and 671 women (2.6%), a total of 2376 people (4.4%), who were claimants of Jobseekers Allowance (JSA) in Great Yarmouth.
- 2.29 This figure of 4.4% is of course very much lower than the 10.3% quoted for Great Yarmouth in the SHU study. The difference is explained by the fact that claimant unemployment has fallen since then throughout the country, and the SHU study defined Great Yarmouth as the urban area, for which higher unemployment rates could be expected, not the Borough as a whole.
- 2.30 Nevertheless, 4.4% is still significantly higher than for the Eastern region (1.6%) and Great Britain (2.1%).

- 2.31 Furthermore, the updating of SHU's original (2002) work on hidden unemployment in 2007 found that although claimant employment had fallen considerably in most areas in the previous five years, hidden unemployment remained high. This can be simply explained: claimants form the majority of those seeking work, and it is at claimants that most effort towards re-employment is directed. There is no reason to suppose that this general conclusion is not also applicable to the coastal areas in particular. As the Government's response (May 2007) to the CLG Committee Report on coastal towns succinctly put it, "as in other urban areas throughout the country, the problem is not a shortage of work but one of high inactivity".
- 2.32 The issue is well illustrated by the data in the Labour Market Profiles, which provide details of key benefit claimants. The total number of claimants in Great Yarmouth was 10,720 in May 2007, representing 19.7% of the working age population of 54,400. This compares with 10.9% in the Eastern region and 14.2% in Great Britain. Of the 10,720 claimants, nearly half (5150) were claiming incapacity benefit. This represented 9.5% of the working age population, compared with 5.1% in the region and 7.2% nationally. There were 2120 job seekers, 3.9% of the working age population, compared with 1.8% in the region and 2.3% in Great Britain.
- 2.33 People on incapacity benefits form the largest single category in SHU's definition of the hidden employed, a definition employed not only in its study of coastal towns but in other research elsewhere in the UK, particularly the former coalfields.

Age and Duration

- 2.34 The data show that the proportion of JSA claimants employed for more than six months is no greater in Great Yarmouth (30%) than in the Eastern Region or in Great Britain. However, the SHU study identifies large numbers of people who have been without work for very much longer, but who do not show up in the official measures of unemployment because they are not claimants.

Job Density

- 2.35 Job density is a measure of the ratio of the number of jobs in an area to working age population. The figure for Great Britain (and in this case, for the Eastern region) is less than one, as the denominator includes economically inactive people.
- 2.36 Data for Great Yarmouth, the three adjoining districts in Norfolk plus Norwich, and selected coastal towns by local authority are set out in Table 4. In the table, Lancaster includes Morecambe, Tendring includes Clacton, and Thanet consists of Margate, Broadstairs and Ramsgate.

- 2.37 There are an estimated 40,000 jobs in Great Yarmouth Borough, and the job density figure is 0.74, less than the Great Britain and regional figures. In all the districts for which data are presented except Norwich, the figure is less than one, although Bournemouth (0.95) approaches it. Among the coastal towns, figures for some areas are even lower than in Great Yarmouth; in the adjacent Norfolk districts, they are much the same.
- 2.38 Norwich is the largest settlement in Norfolk by some way, larger even than the population figure for its administrative area suggests, as many of its outer suburbs lie in other districts. It is the employment, retail service and cultural centre for a wide area and as expected (and like other comparable places such as Exeter) has a job density well above one. Great Yarmouth's figure is in contrast relatively low for an urban area; a town would normally expect to have a higher job density figure than the rural or semi rural districts which surround it.
- 2.39 This measure is not examined in the SHU study, but the values presented in the table are consistent with the SHU findings.

Travel to Work

- 2.40 Table 5 presents data for travel to work flows between the seven districts in Norfolk. The table also includes figures for Suffolk as a whole, and treats all other origins and destinations as "elsewhere".
- 2.41 Taking net flows first, the net outflow of about 2100 people from Great Yarmouth is small compared to that for Breckland, Broadland, and South Norfolk Districts. Despite the fact that the City is underbounded, the net inflow to Norwich is very large indeed – nearly 39,000 people. What is striking about Great Yarmouth is the relatively small level of interaction with other areas: with the exception of the inflow from Broadland District (about 1400 people) and outflow to Norwich (2,100 people) all flows to and from other districts in Norfolk are less than 1,000. There is greater interaction with Suffolk; it can be inferred that most of this is with the adjacent Waveney District.
- 2.42 This is broadly consistent with the extent of the Great Yarmouth Travel to Work Area (TTWA) which covers the Borough and small parts of North Norfolk and Broadland Districts only. In contrast, the Lowestoft and Beccles TTWA to the south covers a wider area, and the Norwich TTWA is much more extensive still, covering the City, most of Broadland and South Norfolk Districts, and significant parts of Breckland and North Norfolk Districts.
- 2.43 TTWAs have not been redefined on the basis of 2001 data; but the 1991-based TTWAs are still considered to be helpful indicators of spheres of economic influence.
- 2.44 The SHU report makes a general point about the inaccessibility of many (though not all) coastal towns, and in particular their distance from the motorway network. This is true of

Great Yarmouth, where in addition the town is hemmed in by the rivers Yare and Waveney and their extensive marshes.

- 2.45 The explanation for the low job density figure combined with a relatively small net outflow of workers is that the denominator for the job density calculation includes all people of working age, not just the economically active. It is the high levels of economic inactivity which lead to a low job density figure and relatively low levels of net outflow.

3 Casinos and the Borough Council

- 3.1 As indicated in Section 1, a casino forms a significant element of the proposed development. This will be a 'large' casino, which is the second of the three new types of casino allowed for by the Gambling Act 2005. The first and largest category was the 'regional' casino, of which eight were originally proposed. By the time the Casino Advisory Panel published its report in January 2007, this number had been reduced to one, for which the recommended location was Manchester. This proposal has now been abandoned.
- 3.2 These changes however made no difference to the number and size of the 'large' and 'small' categories. A definition of both appears in paragraph 2, Chapter 1 of the Panel's report: the former has a minimum customer area of 1,500 square metres, and with a maximum of 150 category B gaming machines.
- 3.3 The process by which the locations for one 'regional', eight 'large' and eight 'small' casinos were chosen by the Panel included bidding by local authorities to be chosen as locations for one of the casinos. About 50 local authorities took part; some withdrew before the Panel's Final Report was published. Great Yarmouth was one of the eight recommended locations for a large casino, and the only coastal one.
- 3.4 Nothing in the Panel's recommendations diminishes the need for planning permission to be secured for a casino development, and for such applications to be accompanied by such information as local planning authorities requires. However, the bidding process involved the local authorities themselves providing, to the Panel, the kind of supporting information which they often require from applicants. It is to Great Yarmouth BC's submissions to the Panel that this section now turns.
- 3.5 The first submission, dated March 2006, summarised the economic and social characteristics of the Borough. The following are the key points:
- Great Yarmouth is described as the third most popular seaside destination in the UK, receiving 1.33m staying visitors and 3.7 million day visitors a year. This accounts for 32% of all employment in the Borough (paragraph 1.3). This is a larger proportion than indicated by the Labour Market Profiles (see paragraph 2.14 above), and indicates a different method of calculation.
 - Visitor numbers have fallen from a peak of 12 million in the 1970s to about 7 million in the early 1990s to level off (for the time being) at about 5 million (paragraph 1.4).
 - Paragraph 1.6 summarises the Borough's principal attractions: a racecourse, a greyhound stadium, 2 casinos, the Pleasure Beach complex and over 30

amusement arcades – but does not name, as it might have done, other significant features such as the Sea Life Centre, Model Village, Amazonia and the two piers.

- Paragraph 1.9 describes the Borough's 'traditional catchment area' which extends beyond the Eastern region to take in London and the East and West Midlands; 33% of visitors are however from the Eastern region.
- Paragraph 1.15 summarises the benefits of the new deep water outer harbour now under construction.

3.6 Paragraph 1.19 states that average weekly earnings are low. The source is the New Earnings Survey of 2003, although it is unclear whether the figures are for residents or the workforce.

3.7 Paragraph 1.20 draws attention to educational attainment in the Borough, which shows poorer results at GCSE level than for Norfolk or for England. It also refers to "the highest drop out rate from further education colleges in the whole country".

3.8 Paragraph 1.22 asserts that despite the availability (currently) of all forms of gambling, a low wage economy and the 'intense deprivation' suffered by some of the population, there are no social problems arising from existing gambling. The following paragraph (2.1) suggests the evidence for this: information from the Citizens Advice Bureau and the police.

3.9 Section 3 of the submission is entitled Regeneration Need. Its key points are as follows:

- The Index of Multiple Deprivation (2000) identified Great Yarmouth as 43rd most deprived in the scale of deprivation out of the 350 or so local authorities in England.
- It summarises the findings of the SHU study, The Seaside Economy.
- It provides estimates of the likely number of jobs that would be created by the 3 types of casino: 1,200 (regional), 400 (large) and 200 (small). The submission attempts to make the case for the largest of these, and states inter alia that 90% of the client base of a small casino, and 80% of a large casino, would consist of existing tourists.
- Paragraph 3.32 asserts without offering evidence that "we feel that the Borough and sub region are able to meet the employee numbers and skill sets needed to staff a Regional Casino and other related developments".
- Paragraph 3.33 sets out assumed salary bills for economic modelling purposes for the three sizes of casino and figures for the 'multiplier effect' for the local economy. It does not however explain the origin of the multiplier figures or work out the effects for the local economy.

- 3.10 The response to the Casino Advisory Panel's questions raised the job estimates downwards – to 350 for a large casino and 140 for a small. The former figure nevertheless still exceeds the applicant's calculations set out in Section 4.
- 3.11 The Panel also asked about the existence of education and training facilities. The Borough Council's response indicated a commitment to provide for training in the leisure industry in the same way as already provided for food, hospitality, and the hotel and security industries.

4 Job Creation

- 4.1 The proposed development will create jobs in the construction phase and in the operational phase. These are considered in turn below.

Construction Phase

- 4.2 It is understood that the total costs of construction are estimated at £40m. On the basis that the average output of a construction worker is £50,000 a year, the proposed development would create 800 person/years of employment.
- 4.3 It is estimated that the period of construction will be 2½ years. On this basis, the proposed development will create about 320 full time equivalent jobs over the period as a whole. Labour demand will not be constant over the period, however. Although there is no profile of employment available, it is likely that the demand for labour will follow the usual pattern: relatively small numbers at the beginning and end, and relatively large numbers in the middle. There will also be the usual phased requirement for people with different skills – for basic construction skills at the beginning and for ‘finishing’ (joinery, electrical, plumbing and plastering) towards the end.
- 4.4 These figures compare with the total of 1,200 people working in the construction sector in Great Yarmouth in 2006, 18,000 in Norfolk and 16,100 in Suffolk.
- 4.5 One of the main issues arising in the consideration of the construction phases of major developments is the extent to which contractors rely on specialist workers brought in from outside the area and the extent to which, on the other hand, jobs go to local people. Previous experience has indicated that construction workers are prepared to travel up to 90 minutes each way for the duration of major projects.
- 4.6 On the basis of the AA drive time guidelines (www.theaa.co.uk), a 90 minute isochrone extends as far as (clockwise from the south) Ipswich, Newmarket and Kings Lynn. This broadly covers the whole of Norfolk and Suffolk. It is concluded that despite its scale the proposed development will not lead to demand for construction workers that cannot be satisfied within the region.

Operational Phase

- 4.7 The applicants have provided estimates of the likely employment in a “large” casino as defined by the Casino Advisory Panel. These estimates are set out in Table 1 below, and are based on assumptions about for example the number of gaming tables and slot machines, the provision of a restaurant and two bars, and the nature of the operation in terms of its opening hours and seasonal fluctuations in demand and visitor levels.

- 4.8 The estimated number of jobs, in full time equivalents and taking into account the broad categories of employment – managerial, gaming, hospitality, security and surveillance, housekeeping, cleaning and maintenance – is 250.
- 4.9 Table 6 in Appendix 2 sets out estimates of the number of jobs created in the development as a whole in the operational phase. These are mostly based on Arup Economics and Planning (2001), the most recent and comprehensive work on the relationship between floorspace and employment.
- 4.10 That relationship is known as job density and the table shows that it varies considerably between the different uses in the proposed development, from very high in the restaurants (a labour intensive operation) to very low in the cinema complex (where relatively few jobs are created). Bowling falls midway between the two.
- 4.11 Section 4.3 of the Arup report covers density variations within uses. Paragraph 4.3.4 refers to a figure of 6 square metres per person for a “middle-upper market” casino in London. Application of this figure to the proposed casino floorspace, however, results in an implausibly high job figure; but on the other hand to apply the standard 40 square metres per person for amusement and entertainment centres (the most appropriate general category) results in a much lower figure than that provided by the applicants. In Table 6 therefore the applicant’s estimates have been used for the casino and the Arup figures for all other uses. The table shows that just over 700 jobs would be created altogether.
- 4.12 These are full time equivalents. Given the nature of the proposed uses, with activity in all the proposed uses extending well beyond the conventional working day, into the night and at weekends, a significant proportion of the jobs are likely to be part time or involve shift work.
- 4.13 Insofar as the total number of jobs can be calculated with confidence from a figure for full time equivalents, it is estimated that the total number of jobs arising from the scheme as a whole will be in the order of 900.

5 Conclusions

- 5.1 The data examined in Section 2 present a mixed picture of economic conditions in Great Yarmouth Borough. Despite the fact that claimant unemployment rates have fallen considerably since the SHU report on seaside towns was first published in 2003, claimant unemployment in Great Yarmouth remains high by national standards. More recent work by SHU has concluded that even though claimant unemployment has fallen throughout the country, rates of hidden and therefore real unemployment remain high. The data for the number and type of benefit claimants presented in the Labour Market Profiles show the high proportion in Great Yarmouth on sickness or incapacity benefits. Also on the debit side is the small proportion of the resident population educated to degree standard or above, and a relatively small proportion to NVQ Level 3 and above.
- 5.2 At the same time, however, although more people travel out of Great Yarmouth Borough to work than come in, the net outflow is not especially large, representing less than 6% of the total resident workforce. Also, the data for earnings, insofar as they can be considered to be wholly reliable, suggest that there is a significant amount of relatively highly paid employment, especially for men, in the Borough – but occupied mainly by people commuting in from outside.
- 5.3 A key phrase in the SHU work on hidden unemployment generally and on the coastal towns in particular is that the hidden unemployed “are those who could reasonably be expected to have been in work in a fully-employed economy”. The same paragraph in “The Seaside Economy” however goes on to say that “sickness claimants are disproportionately male, over 50 and have relatively few formal qualifications”. The high proportion of economically active men in Great Yarmouth described as “not wanting a job” has already been noted in paragraph 2.10 above.
- 5.4 However, the level of claimant unemployment, is sufficient to justify, subject to reasonable limits, any efforts to provide for more employment in the Borough. An incidental benefit would also be to claw back some of the net out-commuting, although this is not at such high levels as to be unsustainable. However, self containment could be regarded as a reasonable aim for the longer term; this would contribute towards sustainability provided that the gross flows were not excessively large.
- 5.5 In RPS’s opinion, this evidence taken in the round points firmly to the need for the local economy to be strengthened in appropriate ways. The material examined in this report also identifies another issue which will need to be examined separately – the fit of suitably qualified people to the employment on offer in the proposed development. The leisure industry increasingly demands a suitable level of appropriate qualifications among its staff to operate effectively – but not all by any means necessarily at degree standard. The proposed development will provide opportunities for local residents, and a challenge to providers of further and higher education – but a challenge which the Borough Council is confident can be met. This is an issue outside the

scope of this report. What this report has done is to establish beyond reasonable doubt the need for new employment opportunities in the Borough.

Appendices

Appendix 1

References

Appendix 1: References

1. Final Report of the Casino Advisory Panel, DCMS, January 2007
2. Regional/Resort Casino Proposal, Great Yarmouth BC, March 2006
3. Additional information for the Casino Advisory Panel, Great Yarmouth BC, August 2006
4. Response to Casino Advisory Panel Supplementary Questions, Great Yarmouth BC, October 2006
5. The Real Level of Unemployment 2007 Centre for Regional Economic and Social Research, Sheffield Hallam University 2007
6. The Seaside Economy Centre for Regional Economic and Social Research, Sheffield Hallam University 2003
7. Coastal Towns: Second Report of Session 2006-07: House of Commons Communities and Local Government Committee 2007
8. Government Response to the Communities and Local Government Committee Report on Coastal Towns [CM7126] 2007
9. Arup Economics and Planning Employment Densities: A Full Guide 2001

Appendix 2

Tables

Table 1

Employment in Tourism

	Total Jobs	Jobs in Tourism	Percent
Great Yarmouth	37000	6400	17.3
Bournemouth	78700	10100	12.8
Lancaster	53600	5300	9.9
Scarborough	41000	7400	18.0
Tendring	36700	3700	10.1
Thanet	38600	3700	9.6
Waveney	40900	4700	11.5
Weymouth	18500	3600	19.5

Source: NOMIS Labour Market Profiles

Table 2

Qualifications

	NVQ4 and above (%)	NVQ3 and above (%)	No qualifications (%)
Great Yarmouth	9.8	31.5	17.0
Bournemouth	27.2	48.3	8.6
Lancaster	26.3	50.2	6.8
Scarborough	21.2	38.1	19.2
Tendring	19.1	23.4	24.5
Thanet	22.9	37.4	16.4
Waveney	18.4	37.3	15.1
Weymouth	17.8	38.1	13.3
Great Britain	27.4	45.3	13.8

Source: NOMIS Labour Market Profiles

Table 3

Earnings

	By residence	By workplace	Difference
Great Yarmouth	409.20	445.50	36.30
Bournemouth	414.00	403.30	-10.70
Lancaster	475.20	441.20	-34.00
Scarborough	378.10	367.20	-10.90
Tendring	423.70	345.40	-78.30
Thanet	424.70	407.00	-17.70
Waveney	400.50	358.60	-41.90
Weymouth	383.40	337.20	-46.20

Source: Annual Survey of Hours and Earnings

Table 4**Job Density**

	Population	Jobs	Job Density
Great Yarmouth	93400	40000	0.74

Adjacent Districts

	Population	Jobs	Job Density
Broadland	122000	49000	0.68
North Norfolk	100600	41000	0.76
Norwich	129500	103000	1.22
South Norfolk	116200	50000	0.75

Selected Coastal Towns (by local authority)

	Population	Jobs	Job Density
Bournemouth	161200	93000	0.95
Lancaster	143000	62000	0.69
Scarborough	108300	48000	0.77
Tendring	144600	42000	0.55
Thanet	128600	50000	0.69
Weymouth	64900	21000	0.55

East of England			0.82
Great Britain			0.84

Source: NOMIS Labour Market Profiles

Table 5

Norfolk Travel to Work

Origin	Destination							Total	Suffolk	Elsewhere	Grand total
	Breckland	Broadland	Great Yarmouth	King's Lynn	North Norfolk	Norwich	South Norfolk				
Breckland	35762	1686	93	2259	1040	4574	2652	48066	5075	3568	56709
Broadland	865	24441	1372	279	2554	23602	2524	55637	674	2588	58899
Great Yarmouth	195	913	28727	112	833	2113	540	33433	2583	2285	38301
King's Lynn	1333	212	105	47942	872	561	130	51155	1499	8091	60745
North Norfolk	647	2748	676	898	30317	3994	557	39837	194	1727	41758
Norwich	926	5965	561	129	924	38806	3762	51073	971	1705	53749
South Norfolk	2267	2327	638	132	275	14156	26013	45808	4881	1924	52613
Total	41995	38292	32172	51751	36815	87806	36178	325009			
Suffolk	2571	564	3395	934	187	2728	3097				
Elsewhere	758	344	593	3714	546	2029	617				
Grand total	45324	39200	36160	56399	37548	92563	39892				

Net flows

Breckland	-11385
Broadland	-19699
Great Yarmouth	-2141
King's Lynn	-4346
North Norfolk	-4210
Norwich	38814
South Norfolk	-12721

Source: 2001 Census via Norfolk CC

Table 6**Estimates of Employment**

Use	Fisp	Terrace	Total	Fisp/person	Jobs
Restaurant 1	460	50	510	13	39
Restaurant 2	305	55	360	13	28
Restaurant 3	547	106	653	13	50
Restaurant 4	461	32	493	13	38
Restaurant 5	434	158	592	13	46
Restaurant 6	363	142	505	13	39
Subtotal			3113		239
Casino*			5660	N/A	250
Bowling			1585	40	40
Cinema			2905	90	32
Subtotal			10150		322
Total			13263		
			Beds	Persons/bed	Jobs
Hotel			180	0.8	144
Site Management (car parking, maintenance, security, etc)**					25
Grand total					730

Floorspace in square metres

*Number of jobs calculated on the basis of figures in Arup Economics and Planning Employment Densities: A Full Guide July 2001 except casino, where the applicant's estimates are given

** It is estimated that about 25 jobs will be created by the owner for general management operations - car parking, maintenance, security, management and cleaning.