Investment in Places series

Framing a place-based investment strategy for Great Yarmouth

Authors:

Marianne Sensier[x]

Kate Penney[x]

Michael Francis[x]

Abhi Sharma[x]

Alfonso Silva Ruiz[x]

Philip McCann[x]

Date:

May 2026

The Productivity Institute

Productivity Insights Paper No. 089

[x] The Productivity Institute

Key words
Place, investment, labour productivity, infrastructure, transport.

Authors' contacts
marianne.sensier@manchester.ac.uk
kate.penney@manchester.ac.uk

Acknowledgements

We would like to thank Simon Best, Rebecca Moore, Natasha Hayes and Paul Gardener for their insights. We would like to recognise the value that has been added to our report from stakeholder's participation in the workshop and interviews.

Suggested citation

M. Sensier, K. Penney, M. Francis, A. Sharma, A. Silva Ruiz, P. McCann (2026) *Framing a place-based investment strategy for Great Yarmouth*, Productivity Insights Paper No. 089, The Productivity Institute.

The Productivity Institute is an organisation that works across academia, business and policy to better understand, measure and enable productivity across the UK. It is funded by the Economic and Social Research Council (grant number ES/V002740/1).

The Productivity Institute is headquartered at Alliance Manchester Business School, The University of Manchester, Booth Street West, Manchester, M15 6PB. More information can be found on The Productivity Institute's website. Contact us at theproductivityinstitute@manchester.ac.uk

Abstract

Productivity in Great Yarmouth is about how the area converts its resources into better outcomes for firms, workers and residents. These assets span physical infrastructure, population health and skills, community networks, finance, innovation, local leadership and natural resources (such as the coastline and the Norfolk Broads). Great Yarmouth has sectoral strengths in advanced manufacturing, clean energy and tourism offering promising avenues for growth, especially with the expansion of offshore wind and energy-related industries. Great Yarmouth does face significant challenges, including low productivity levels, health inequalities and lower financial and human capital.

Great Yarmouth has pro-active local leaders, natural beauty and historical and cultural assets. It has a vibrant creative sector, and unique coastal and wetland environments. It is a town at a point of transition with the opportunity to align local skills, cultural assets and natural capital to drive inclusive and sustainable growth. Great Yarmouth needs to develop joined-up strategies that integrate these assets into tourism and regeneration plans, and by aligning skills development with sectoral growth, the town can communicate a compelling place narrative. This approach will help attract investment, retain talent and deliver long-term social and economic benefits.

Contents

Executive Summary

Productivity in Great Yarmouth is about how the area converts its resources into better outcomes for firms, workers and residents. These assets span physical infrastructure, population health and skills, community networks, finance, innovation, local leadership and natural resources (such as the coastline and the Norfolk Broads). The outcomes we aim for are more productive firms, better jobs and wages, and higher living standards. We combine data analysis with wide engagement across government, business, education and the community to understand how the resources can be used more effectively and how long-term prosperity can be built through broad-based, sustained and evidence-led investment strategies.

Great Yarmouth has pro-active local leaders, natural beauty and historical and cultural assets. It has a vibrant creative sector, and unique coastal and wetland environments. It is a town at a point of transition with the opportunity to align local skills, cultural assets, and natural capital to drive inclusive and sustainable growth. Great Yarmouth faces significant challenges, including low productivity levels, despite experiencing short- and medium-term productivity growth. Health inequalities and limited financial and human capital may constrain regeneration and renewal efforts.

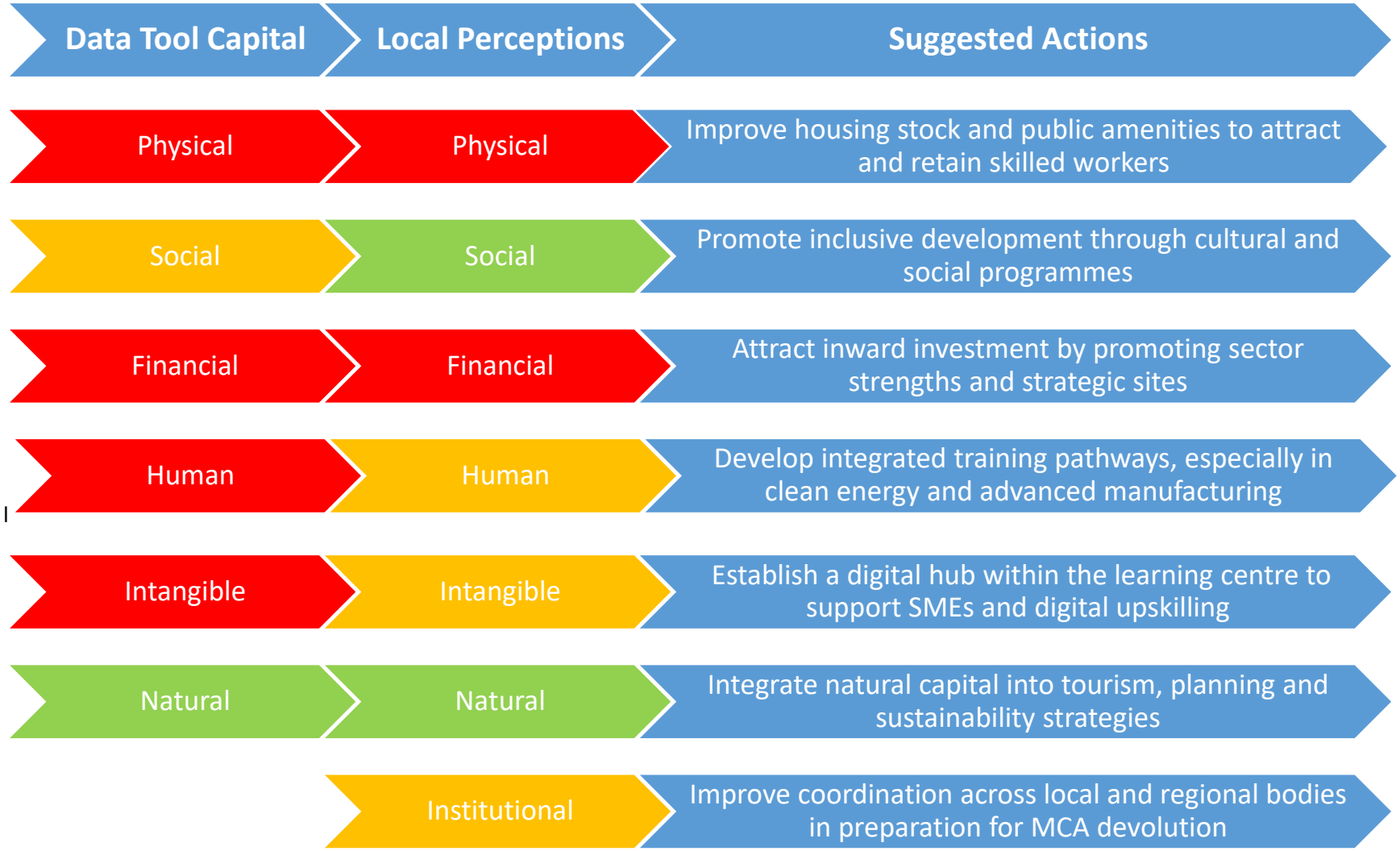
In Great Yarmouth the employment rate has been increasing, and the skills of the working population has been improving over time. Great Yarmouth has good digital infrastructure. The gas pipeline that is processed in Great Yarmouth adds a substantial and growing share to output. Great Yarmouth has sectoral strengths in advanced manufacturing, clean energy and a tourism offer promising avenues for growth, especially with the expansion of offshore wind and energy-related industries.

The town faces challenges in meeting the skills demands of emerging sectors such as offshore energy, where shortages in vocational roles highlight the need for targeted investment in training across a range of levels, including apprenticeships. A coordinated approach involving local authorities, industry, and education providers is essential to bridge this gap.

Despite some geographic constraints that affect recruitment in coastal towns, Great Yarmouth has significant untapped potential. By developing joined-up strategies that integrate cultural and natural assets into tourism and regeneration plans, and by aligning skills development with sectoral growth, the town can communicate a compelling place narrative. This approach will help attract investment, retain talent, and deliver long-term social and economic benefits. Collaborative intervention across governance, education, and industry is essential to unlock Great Yarmouth's potential and ensure inclusive, sustainable growth.

Great Yarmouth Strength of Capitals

The first column is from the Capitals data tool. The colours signify: green for authorities ranking 1-120, amber for those ranking 121-240 and red for those ranking 241-361. Local perceptions gauge the strength of capitals from the qualitative workshop and interviews.



Great Yarmouth Recommendations

Key to action: short term (within the next year); medium term (1-5 yrs); long-term (5-10yrs)

The recommendations cut across a number of different areas and need investment simultaneously to improve productivity:

Barriers to Productivity Growth	What Needs to Be Transformed	Opportunities for further collaborative intervention	Capitals
Economic Outcomes Comparatively challenging financial and physical capital indicators.	Infrastructure, connectivity, and business environment.	**Short-term:** Enhance broadband access, support business creation, and attract investment through targeted regeneration projects. **Medium-term:** Complete the North Quay redevelopment and launch the energy-focused business incubator at South Denes. **Long-term:** Upgrade transport links and digital infrastructure; improve access to amenities in deprived areas.	Physical Financial Human Intangible
Better Welfare Outcomes Skills mismatch with industry needs.	Skills development and training pathways.	**Short-term:** Engage with stakeholders to develop a joined-up skills strategy aligned with sectoral growth, including vocational training and apprenticeships. **Medium-term:** Partner with East Coast College and University of Suffolk to expand the new university learning centre and offer offshore energy apprenticeships. **Long-term:** Establish a digital hub within the new university learning centre to support SMEs and digital upskilling.	Human Social Institutional
Reframing Common Purpose Unhelpful preconceptions Limited communication of collectively owned place vision.	Local identity and branding.	**Short-term:** Strengthen regional governance frameworks and improve coordination between local and regional stakeholders. **Medium-term:** Use the proposed Mayoral Combined Authority (MCA) to align funding and strategy across Norfolk and Suffolk. **Long-term:** Build a compelling, positive narrative for Great Yarmouth to attract talent, visitors and investors. Create a campaign showcasing its offshore wind cluster and cultural vibrancy.	Intangible Human Social Institutional
Wellbeing Outcomes Underutilised cultural and natural assets. High levels of deprivation and poor health outcomes.	Integration of place identity into economic planning. Human capital and social inclusion.	**Short-term:** Promote The Drill House and Hippodrome as cultural anchors; develop eco-tourism packages around The Broads National Park. Undertake an asset mapping exercise. **Medium-term:** Invest in health, education, and community infrastructure to improve life chances and reduce inequalities. Expand community health outreach and digital inclusion programs to support residents with limited access to technology. **Long-term:** Embed cultural, social and natural capital into tourism, regeneration, and investment strategies.	Natural Human Social Institutional

1. Introduction

Great Yarmouth has many diverse assets to both enhance liveability and support economic growth, from natural beauty, including the coast and wetlands, to a thriving creative sector and circus heritage and many historical buildings of cultural significance. During our research Great Yarmouth was described as a vibrant and culturally rich place with a strong sense of community, history, and character. It is also not without challenges around skills, health and external preconceptions that can be negative. Many examples were shared of community groups and local actors proactively and creatively taking actions to improve the area, focusing on jobs, well-being, education, and the arts.

Great Yarmouth is home to one of the biggest outdoor arts festivals of its kind in the country, and its natural environment provides many opportunities for tourism and development. However, like many places, it is actively working to redefine its identity in response to long-term economic and social changes. Great Yarmouth has historically thrived on sectors which, over time, have declined and/or evolved. This places Great Yarmouth at a point of transition as it builds an inclusive vision that aligns current economic and social realities with sectoral and community needs. Place-based development, strong strategic leadership, and effective use of local assets are crucial to shaping Great Yarmouth's future.

In addition to its cultural and natural capital, new developments in offshore energy, including oil, gas, and wind, are taking place along the Coastal Arc to Lowestoft. While this creates new opportunities for Great Yarmouth, including the emergence of a cluster of businesses in these sectors, optimising this potential requires adhering to the well-coordinated skills strategy. This strategy will be essential for developing and recruiting the necessary workforce, which can be challenging in a relatively remote geographic area. Additionally, it will be important to monitor how offshore wind development and technology evolve and the implications that this may have for training and workforce development. Overall, these transitions present strategic, economic, and policy challenges that demand long-term planning and investment to support regional productivity and development.

Economic growth in sectors such as offshore energy will not automatically lead to inclusive development in places like Great Yarmouth unless accompanied by investment in other important assets such as cultural infrastructure and natural capital. By embedding culture and nature into place-making, along with the offshore opportunities, Great Yarmouth can strengthen its identity, retain skilled workers, and ensure that economic growth translates into lasting local benefit. Strong leadership, which enables local leadership and coordination across the capitals, will be critical.

What is Productivity?

Productivity is a measure of how efficiently an area or organisation can transform its resources into beneficial outcomes. Labour productivity is the output that each worker produces per hour. Places that can increase their worker productivity tend to have higher standards of living and wellbeing. Productivity growth can be achieved in a number of ways, including greater investment associated with technological change and skills. However,

productivity is also a result of how well organised a place is, and so productivity promotion requires a solid understanding of how the assets interact to create productivity. [1]

The concept of "inclusive growth" is crucial where, as per our definition in the Productivity Primer (The Productivity Institute, 2024), three things matter:

- Broad-based access to resources (the capitals).
- "Efficient" methods to transform resources to outputs, including technology, innovations, organisational and social changes that reduce waste (financial, time, people's capabilities, environmental damages, etc).
- Distribute the gains widely across society so that in the process of "structural change" (economically and socially) people are brought along.

Investment in Productive Places Campaign

This report sets out our findings for Great Yarmouth for the Investment in Productive Places Campaign (IPPC)[2]. We discuss how a joined-up strategy for investment can help productivity to grow in places that have the potential to improve and fully leverage investment opportunities. To deepen our understanding of how some of the most abstract and difficult-to-quantify elements of the capitals' framework are being thought about in practice, we use a mixed methods approach presenting both quantitative and qualitative analysis. In addition to gaining insights into how the capitals are viewed across a range of stakeholders, we are also interested in the interdependencies between the capitals. Our qualitative work involved a survey and workshop in Great Yarmouth on 16th May 2025. Then follow-up interviews were conducted between June and October 2025. The qualitative work provided crucial insight into lived experience from a range of perspectives across the region and helped to shape our understanding of the interdependencies between the capitals. These perspectives helped interpret the quantitative data and shape our recommendations.

Regional inequalities in productivity and living standards across the UK are stark and have been increasing over time (see McCann, 2020). The need to address such inequalities not only matter for the lived experiences of citizens - the quality of life for individuals and families, but also the levels of economic growth, development and productivity achieved by businesses and organisations that in turn support the level of goods and services that the public benefit from. Although the UK is world leading across a range of sectors and with many places exhibiting high levels of productivity, innovation and good jobs, this is still overly concentrated in specific areas, and the long tail of low productivity is a prevalent issue to address.

The former Government's Levelling Up White Paper (DLUHC, 2022) recognised that reducing spatial disparities would require an understanding of several interdependent factors and identified six capitals to address this, these included:

[1] For a blueprint on boosting UK's productivity see the Productivity Agenda, Coyle, et al (2023).

[2] See The Productivity Institute's Investment in Productive Places Campaign web-site: https://www.productivity.ac.uk/regions-nations/investment-in-places/.

- Physical capital – infrastructure, machines and housing.
- Human capital – the skills, health and experience of the workforce.
- Intangible capital – innovation, ideas and patents.
- Financial capital – resources supporting the financing of companies.
- Social capital – the strength of communities, relationships and trust.
- Institutional capital – local leadership, capacity and capability

In our research we add to this list natural capital, this refers to a place's stock of natural resources and ecosystems that provide a wide range of valuable services and products for humanity. The investment in natural capital supports environmental conservation, access to green space, and contributes to net-zero targets by reducing greenhouse gas emissions.

We argue that a broad-based investment strategy across different types of "capital" is required to help to lift places out of low productivity traps and create better and lasting outcomes for their communities and businesses. Our seven-capitals framework is a holistic approach to understanding and improving productivity and economic resilience in a place. It identifies key assets that contribute to growth and well-being, emphasising that these capitals are interconnected. Investment in one capital can trigger positive effects across others.

These capitals need to be utilised as productively as possible to foster local growth, as all resources are scarce and better outcomes are required to help close the large gap in regional inequalities (TPI, 2024). The community capitals framework has been applied to US regions. Emery and Flora (2006) note that a community could become stronger by strategically increasing its capacity within each capital. As the flow of assets are connected investing in one capital can trigger positive outcomes across the other capitals. A study by Losada-Rojas et al, (2024) analysed the community capitals at the US county level for the Great Lakes Region. They found that to build community resilience there was a need to increase active partnerships among education, non-profits, community foundations, businesses and government institutions working in tandem.

Table 1: Drivers of Productivity, Stakeholders, Capitals and Growth Missions

Drivers of Productivity	Primary Stakeholders	Capitals	Growth Mission
Business performance & characteristics	Firms	Intangible Financial Social	Industrial strategy & trade + Innovation
Skills & training	Individuals in the workforce	Human	People: more people into good jobs
Policy & institutions	Government	Institutional Social	Place: devolution & reform
Health & wellbeing	Individuals in society	Human Social	Build an NHS fit for the future
Investment, infrastructure & connectivity	Business environment	Physical Natural	Investment, infrastructure & planning + Net Zero

Source: Donaldson et al (2025) Table A9.2 and HM Government (2024) Plan for Change.

The Productivity Institute research on the "drivers of productivity" are discussed in Donaldson et al (2025) to understand the prosperity gap between Northern Ireland and the UK. Donaldson et al (2025) note who the primary stakeholders of the drivers of productivity are and how these map onto the capitals, this is summarised in Table 1. The HM Government (2024) Plan for Change outlined the missions and milestones of the UK Government. Table 1 notes how the components of the growth mission link to the capitals and drivers of productivity (except for health and wellbeing that links into the mission to building an NHS fit for future).

The Productivity Institute's Productivity Lab (see Watson Ortega-Argilés, 2025, and McKeogh et al, 2025) has produced further scorecards and dashboards for the drivers of productivity for the East of England ITL1 region and for ITL3 sub-regions in the East (see also van Ark et al, 2025). In the next section of this report we produce a scorecard for Great Yarmouth's drivers of productivity compared to East of England. We also include tables of the experimental data tool for Great Yarmouth and the other local authorities in Norfolk and Suffolk. The data tool includes variables for human, social, financial, physical, intangible and natural capitals[3].

The structure of the report is as follows. First, we discuss Great Yarmouth's geography and demography, policy context and investments. In the second section we discuss the labour productivity metrics and the drivers of productivity. The third section sets out the sector strengths within Great Yarmouth, highlighting the strength of the Government's Industrial Strategy eight priority sectors. The fourth section describes the capitals and the indicator variables within the experimental data tool. The fifth section focuses on the qualitative findings from the study and presents a word cloud from the workshop discussion and the themes that have emerged. The final section concludes, setting out our recommendations.

Great Yarmouth Geography and Demographics

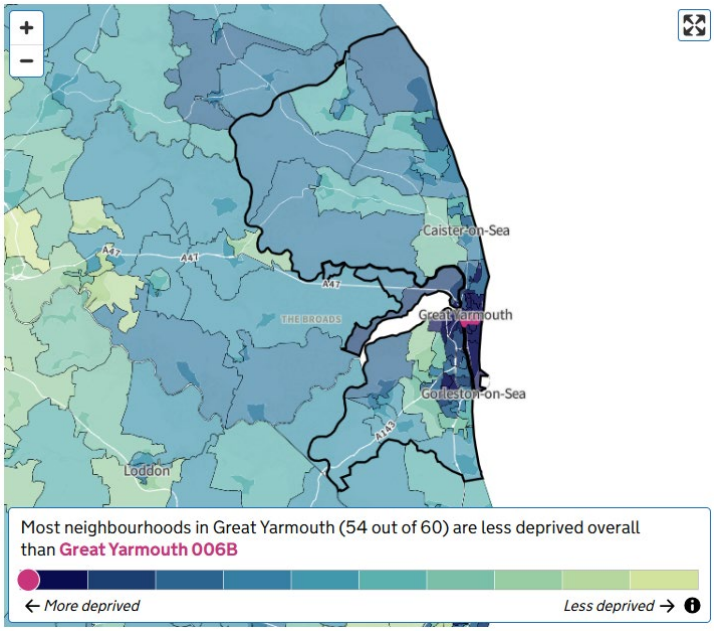
The Borough of Great Yarmouth in the county of Norfolk comprises the towns of Great Yarmouth and Gorleston-on-Sea and a number of villages and rural areas. Great Yarmouth is a mixture of urban and rural land. The town of Great Yarmouth is the Borough's administrative centre and stands on a shingle bank across the mouth of Breydon Water, which is formed by the Rivers Yare, Bure, and Waveney. The geology is gently undulating in the east on glacial tills, with flat marshland adjacent to the Broadland rivers. Most land use outside the built-up urban areas is used for farming. This is predominantly arable farming although there are grazing marshes on the river floodplains. Large areas adjacent to the coast are associated with tourism which is one of the Borough's main industries.

Great Yarmouth is made up of 60 neighbourhoods (or Lower Super Output Area, LSOA) in total with 15 LSOAs existing within the top 10% of the most deprived in the country (or 25%, see MHCLG, 2025). This ranks Great Yarmouth as the 25th most deprived English local authority out of 296 (based on the rank of local authorities with the most 10% deprived LSOAs in England). Great Yarmouth also has some relatively affluent areas with 7 LSOA's in the 40% of the least deprived areas in the country (12% of neighbourhoods). The map in Figure 1 shows the majority of the most deprived LSOAs are mostly along the seafront, with areas to

[3] IPPC interactive data tool: https://lab.productivity.ac.uk/insights/tpi-local-authority-capitals-dashboard/

the south east of Hemsby and particularly the area to its south and south west of the town centre. The most affluent locations are coalesced around the north of the borough and south of Gorleston-on-Sea.

Figure 1: Great Yarmouth, Index of Multiple Deprivation 2025 Map



Source: Index of Multiple Deprivation 2025, overall measure from the Ministry of Housing, Communities and Local Government. The neighbourhood Great Yarmouth 006B is where the Town Hall is located with postcode NR30 2QF. See MHCLG.

The population of Great Yarmouth according to the 2021 Census stood at 99,745 people with 50,853 females and 48,892 males[4]. Since the 2011 Census there has been an increase in population of 2.5%, smaller than the 8.3% change for the East of England[5]. Between the last two censuses, the median age of Great Yarmouth increased by three years, from 43 to 46 years of age. This area had a higher median age than the East of England in 2021 (41 years). The ONS mid-year population estimate in 2024 was 100,529 people[6].

Life expectancy, according to the Great Yarmouth population overview in 2023, was 77.4 years for males and 81.6 years for females between the period 2020-22. This compares to the national average for males and females of 78.9 and 83.2 years respectively. Importantly, the gap in healthy life expectancy at birth for people residing within the most and least deprived of 10% of LSOA's in Great Yarmouth was 6.4 years for females and 8.5 years for males. Healthy life expectancy rates are for the whole of Norfolk and in 2022 they stood at 62.9 years for males and 63.9 years for females respectively.

[4] https://www.nomisweb.co.uk/sources/census_2021/report?compare=E07000145
[5] https://www.ons.gov.uk/visualisations/censusareachanges/E07000145/
[6] https://www.nomisweb.co.uk/reports/lmp/lad/1778385061/report.aspx?town=great%20yarmouth

Great Yarmouth Policy Context

Great Yarmouth Borough Council (GYBC) corporate plan 2020-2025 provides a vision to have a vibrant economy, capitalising on the investment in clean energy alongside further investment in the borough and the visitor economy; creating a quality environment for all and improving the life chances of all those living and working in the borough. GYBC aim to achieve its vision by driving and facilitating change in four strategic priority areas: 1) a strong and growing economy; 2) improved housing and strong communities; 3) high-quality and sustainable environment and 4) an efficient and effective council. These are also the basis for Great Yarmouth's Economic Strategy 2020-2025[7].

Great Yarmouth's Skills and Employability Strategy[8] has ambitions to foster a vibrant and inclusive coastal economy that builds on strengths in clean energy and tourism. Residents and employers are at the heart of the strategy as Cllr Daniel Candon, Cabinet Member for Economic Development and Growth, GYBC notes:

"Skills, qualifications and aspirations are leading factors in secure employment, earnings and economic growth. It's essential that our residents can access the kinds of skills and qualifications that employers need. Their requirements are changing as the wider economy - and the way we do business - changes, opening up new skills gaps and new opportunities. Our ambition is that residents of all ages and backgrounds can flourish here and reach their full potential."

GYBC's Skills and Employability Strategy has been designed to support the Borough Council's Economic Growth Strategy and Corporate Plan. It also reflects the Government's Skills for Jobs policy, the Local Skills Improvement Strategy and the Norfolk County Council strategy for adult education. Great Yarmouth's policy landscape is collaborative and co-created/co-owned by the council, the Town Board, the Health and Wellbeing Partnership and the Skills Taskforce.

A proposal for a Mayoral Combined Authority (MCA) across Norfolk and Suffolk, headed by a directly elected Mayor, has been set out by the Government. This will focus on areas like transport, adult education and strategic inward investment, with a suite of decision-making powers delegated to it by the Government, alongside certain responsibilities currently sitting with the two county Councils. The proposal was part of a wider devolution consultation launched in February 2025 and both county councils have agreed in principle to the proposal.

In parallel to this devolution process, Norfolk and Suffolk's county, district, city and borough councils are undergoing a process of unitarisation, through which alternative local authority models – a single pan-Norfolk council, a two-unitary model and a three-unitary model – are being prepared by the councils for consideration by the Minister of State for Local Government and English Devolution. It was noted that in any unitarisation scenario, it is critical that a) allocative funding mechanisms are sensitive enough to respond to specific local challenges and opportunities, b) geo-specific fund awards – such as the 10-year Plan for Neighbourhoods endowment awarded to Great Yarmouth – are ringfenced where inward

[7] https://docs.great-yarmouth.gov.uk/article/11110/Economic-strategy-2020-2025
[8] https://www.great-yarmouth.gov.uk/article/12629

investment strategy-formulation and structural funding will probably sit with the MCA and mayor.

Great Yarmouth Investments

A number of competitive and allocative Government funding awards have been secured by GYBC. Collectively, these represent an ambitious, interconnected programme of precisely calibrated and interwoven interventions to accelerate the improvements in local social and economic health required to realise the vision and ambitions of the stakeholder-led and independently chaired Town Board.

These include a £13.7m Future High Streets Fund award for the period 2020-2024, focused on the adopted Great Yarmouth town centre and encompassing a new library within historic vacant retail premises, residential densification within the town centre and edge-of-centre locations as well as public realm improvements and a new covered market – capitalising on the distinctiveness of the built environment and the Town's physical and intangible heritage.

The Council has worked with Broadland Housing Association and Orwell Housing on plans to build 82 homes[9] (this has included funding from the Government's Brownfield Land release scheme). This is part of a wider ambition to link improve accessibility and permeability between the rail station – as a key gateway – through a regenerated North Quay along the Conge to the historic marketplace and east to the seafront, reflecting the two primary commercial poles of the Town.

The selective layering of successive funding brought Town Deal funding of £20.1m, underpinned by a new Town Investment Plan. This focused on the urban conurbation presented as a single functional economic area that included Great Yarmouth and Gorleston-on-Sea and encompassed enterprise and skills infrastructure as well as place-making projects under four themes: 1) Growth, Regeneration and Business Development; 2) Skills and Aspiration; 3) Arts, Culture & Tourism; and 4) Connectivity and Sustainability. Projects included a new partnership with East Coast College and the University of Suffolk to complete a university learning centre within the same building as the new library to extend opportunities for lifelong learning.

The Council bid for £20m through the Government's Levelling Up Fund competition, focussing on regeneration of spatially coherent sites. This enabled the completion of strategic land assembly to de-risk redevelopment of the key North Quay area as a vibrant new mixed-use riverside quarter, linking to the Conge and town centre to the rail station. The land assembly strategy should be completed by 2026, with a master developer appointed to progress private sector-led redevelopment.

In November 2025, the Town Board submitted a 10-Year Vision and the first 4-Year Regeneration Plan for the "Pride in Place" Programme - a 10-Year/£20m endowment. Plus an

[9] https://www.bbc.co.uk/news/articles/ce8yevlpy1lo

additional £1.5m cap award for next 2 years. These will be designed to amplify and extend the impact of recent investments.

The Council maintains several well-developed strategic projects that can be activated as and when new funding is secured – each carefully proofed against the Town Board's vision and community consultation. These projects are also within a shortlist of 'strategic pipeline projects' maintained by Norfolk County Council in anticipation of the appointment of the new mayor for Norfolk and Suffolk and 'devolution deal' funding – comprising projects and programmes across skills, infrastructure, regeneration, housing, environment and health.

Great Yarmouth is well-placed to capitalise on investment in clean energy with the transition to net zero. The southern North Sea basin has the highest concentration of operational offshore wind farms in the world, with more than a thousand turbines. The majority of these are within 160km of Great Yarmouth, which is the nearest deep-water port that can provide full operations and maintenance capabilities to the industry.

Offshore wind in the southern North Sea basin is set to drive the UK's transition from fossil fuels to renewable energy and represents 30% of all UK projects with planning consent. By 2030, the area will deliver 40% of the UK's target of 40 gigawatts from offshore wind, with new projects installing an additional 8.3 gigawatts of capacity through five new schemes and four extensions to existing windfarms.

The maritime, engineering and technical services businesses that support Great Yarmouth's energy cluster are concentrated in Beacon Park in Gorleston and the Energy Park. The Council's strategic project pipeline includes detailed proposals for a new energy-focused business incubator on South Denes, developed in response to an emerging masterplan for the growth of the energy cluster that also reflects the opportunity presented by a recently-completed £120m third river crossing and Peel Ports' commitment to investing in a new Southern Terminal in the outer harbour in anticipation of further growth in wind installation, operations and maintenance – as well as staging for nuclear newbuild at Sizewell, a potential nationally-significant role in carbon capture, utilisation and storage (CCUS) and hydrocarbon asset decommissioning.

Great Yarmouth has many arts and cultural attractions that celebrate its maritime and medieval past, its artistic heritage, and its long-standing connections to the seaside and circus traditions. Among its major annual events is the Out There Festival, an international festival of outdoor arts and circus that attracts more than 60,000 visitors each year, organised by Out There Arts.

A key landmark in Great Yarmouth is The Ice House, the only remaining building of its kind in the UK. Constructed between 1851 and 1892, it originally played a vital role in the town's fishing industry. The building has now been repurposed as an arts and circus training hub. This work has been supported by a £2 million grant from the National Lottery Heritage Fund, alongside additional funding of £450,000 from the Great Yarmouth Town Deal (funded by HM Government), £350,000 from the Architectural Heritage Fund, £50,000 from Great Yarmouth Borough Council, and £20,000 from Brineflow, with further match funding from Out There Arts, who are also managing the project. Another culturally rich venue is The Hippodrome,

Britain's only surviving total circus building, constructed in 1903. It continues to host year-round events and performances, maintaining Great Yarmouth's historic reputation as a centre for circus arts.

2. Labour Productivity

A recent report has provided detailed analysis of productivity trends in East Anglia and revealed important insights when compared to other UK nations and regions, see the East Anglia TPI Insight's report (Garling and Selvi, 2025). They discuss the uneven distribution of high-skilled jobs across East Anglia. Garling and Selvi (2025) also note that Great Yarmouth has disparities in educational attainment, skills mismatches, and limited investment in training which hinders inclusive economic development.

Great Yarmouth Productivity Metrics and Drivers

The Productivity Institute's (TPI) research on the "drivers of productivity" are set out in TPI's Productivity Lab scorecards and dashboards for the East of England sub-regions (ITL3 McKeogh et al, 2025). Great Yarmouth is in the ITL3 sub-region Norwich and East Norfolk (code TLH51, along with Norwich and Broadland local authorities). The Productivity Lab scorecards examine four regional productivity drivers: business performance, skills and training, health and well-being, and investment and infrastructure. We present the levels and growth rates[10] for productivity, output, income and the drivers of productivity in Table 2. **The positive points to note upfront are that in the short- and medium-term productivity has grown and disposable income has increased over time. The share of the working population with higher level skills has increased and those with no qualifications has decreased over time. The Great Yarmouth employment rate has increased in the short- and medium-term. Great Yarmouth has very good 5G and broadband coverage.**

In the first row of Table 2 we present the UK labour productivity level of £41.9 (GVA/ hour) in 2023 with a fall since 2022 (-0.2% growth rate), then the CAGR of 0.7% per year in the medium term and 0.5% per year in the long term. In the economy measures for Great Yarmouth, we see that productivity (Gross Value Added, GVA per hour and GVA per filled job), output (Gross Domestic Product, GDP, per capita) and income (Gross Disposable Household Income, GDHI, per head) are below the East of England levels in 2023 (the East of England figures are in brackets). This could reflect the lower income of workers in Great Yarmouth. Table 3 shows commuting patterns for workers during the 2021 Census. Great Yarmouth had 38,093 people working in the local authority area in the Census 2021 and of these 81% lived and worked in Great Yarmouth and 19% travelled from another local authority. East Suffolk was the most popular work destination for commuters to and from Great Yarmouth. Of the working

[10] The short-term growth rate is between 2022-2023, the cumulative average annual growth (CAGR) is between 2019 and 2023 for the medium-term and the long-term growth rate is the CAGR between 2008 and 2023. The CAGR is calculated to exclude the COVID-19 disrupted years from the data series. The formula is CAGR = 100 x (((2023 Value /2019 Value)^(1/4 Years)) - 1) applied to the real series (with price effects removed).

residents living in Great Yarmouth, a quarter travel to another local authority for work. A third of working residents worked from home during Census 2021.

The productivity growth rate for Great Yarmouth has increased in the short and medium term but decreased in the long term (the CAGR between 2008-2023 is -0.1% per year). Output (GDP per capita) has increased in the medium term but contracted in the short and long-term. Incomes per head have increased over time. In Figure 2 we compare Great Yarmouth productivity (GVA per hour) and its components, GVA and hours, to the East of England. Great Yarmouth's productivity (GVA per hour) continued to fall after 2008 due to the increase in hours worked, greater than the recovery in GDP, see Figure 2. A fall in hours worked from 2014 leads to an increase in productivity in 2015, but from 2016 a contraction in hours and output leads to lower productivity. In Figure 3 we present the employment series for Great Yarmouth, Norwich, Broadland, North Norfolk, South Norfolk and the East of England. Great Yarmouth employment grew after 2008 but fell after 2010 and is now 2.5% higher than in 2008. This is in comparison to South Norfolk which has seen steady employment increases and is now estimated to have 27% more jobs since 2008. Norwich's employment recovered by 2018 following the recession but then contracted again during the pandemic.

In terms of business performance, we present export intensity and the rate of new businesses in the scorecard in Table 2. Export intensity is an important productivity driver as firms competing in international markets tend to increase their productivity through process efficiencies and cost reduction, so higher export performance by local firms leads to higher regional productivity. García et al, (2024) calculated export intensity by adding the nominal values of trade in good's exports and trade in service's exports and then dividing by GDP. We report export intensity for Norwich and East Norfolk (ITL3) of 24.8% (share of exports to GDP) in 2023 lower than the East of England export intensity of 28.4% (ONS, 2025a). This has been increasing in the short and medium-term for the East and Norwich and East Norfolk.

According to García et al (2024) entrepreneurship, firm dynamicity and firm creation are important drivers of regional productivity and local prosperity. The rate of new businesses for Great Yarmouth was 9.8%, below 10.6% in the East of England in 2023. We see from Table 2 that business births have fallen by -0.7% since 2022, greater than the fall for the East of England of -0.4%, this has also contracted since 2019.

Measures in skills include the share of the population with medium-level skills (Regulated Qualification Framework 3 plus, RQF3+, this is A level equivalent) and those with no qualifications. The academic literature has found that high-level skills can drive productivity by allowing for complex problem solving, technological adoption, greater communication and collaboration, and enhancing decision-making capabilities. A higher share of the working population with no qualifications is expected to be detrimental to regional productivity. The share of medium-level skills in Great Yarmouth at 52.8% of the working population (aged 16-64 years) in 2023 below the East of England level of 67.4%. The share of the working population with no qualifications is at 6.6% below that for East of England of 8.1%. Both these measures have improved in the medium and long-term. The employment rate for Great Yarmouth was at 67.9% in 2023 much lower than the East of England at 77.5%. The ONS reports an increase in the Great Yarmouth employment rate at the end of 2024, up to 70.7%.

Table 2: Scorecard for Great Yarmouth's Drivers of Productivity

Great Yarmouth (East of England in brackets)		Growth (%, Cumulative Average Growth Rates, between dates)		
Economy	2023 Level	Short term (2022-2023)	Medium term (2019-2023)	Long term (2008-2023)
UK Productivity (GVA/hour)	41.9	-0.2	0.7	0.5
Productivity, GVA/ hour (£)	**35.1** (39.7)	**2.8** (1.2)	**3** (1.5)	**-0.1** (0.4)
Productivity, GVA/ filled job (£)	**53,585** (62,724)	**3.6** (1.5)	**2.6** (1.2)	**-0.1** (0.5)
GDP per capita (£)	**26,968** (35,442)	**-1** (-0.1)	**1.1** (-0.1)	**-0.2** (0.4)
GDHI per head (£)	**19,700** (25,732)	**0.5** (1.7)	**0.6** (-0.3)	**0.9** (0.5)
Gross median weekly pay (£) (full-time, workplace earnings)	**627** (675)	**-4.4** (-0.2)	**-0.5** (-0.7)	**-0.3** (-0.2)
Drivers of productivity				
Businesses Performance				
Export Intensity (%)-ITL3	**24.8** (28.4)	**1.7** (0.6)	**6.6** (4.1)	-
Rate of New Business (%)	**9.8** (10.6)	**-0.7** (-0.4)	**-2.7** (-2.6)	-
Skills & employment				
Medium skilled (% RQF3+)	**52.8** (67.4)	**-8.6** (0.2)	**10.8** (4.1)	**5.3** (2.7)
No Qualifications (%)	**6.6** (8.1)	**1.1** (-0.5)	**-31** (-19.7)	**-11.3** (-8.2)
Employment Rate (%)	**67.9** (77.5)	**2** (-0.8)	**-1.6** (-0.1)	**0.4** (0.2)
Health & wellbeing				
Activity Rate (%)	**70.7** (80.6)	**0.7** (0)	**-1.6** (0.2)	**0.1** (0.1)
Inactive due to illness (%)-ITL3	**28.4** (25.9)	-	-	**-**
Working Age (%)	**58.3** (61.3)	**-0.2** (-0.1)	**-0.2** (-0.1)	**-0.4** (-0.3)
Investment, Infrastructure & Connectivity				
5G coverage (%), 2025	**99.7** (87.9)			
Gigabit capable broadband (%), 2025	**83.5** (83.6)			
GFCF per job (£), 2020-ITL3	**8,018** (12,212)			
ICT per job (£), 2020-ITL3	**395** (371)			
Intangibles per job (£), 2020-ITL3	**1,416** (4,042)			

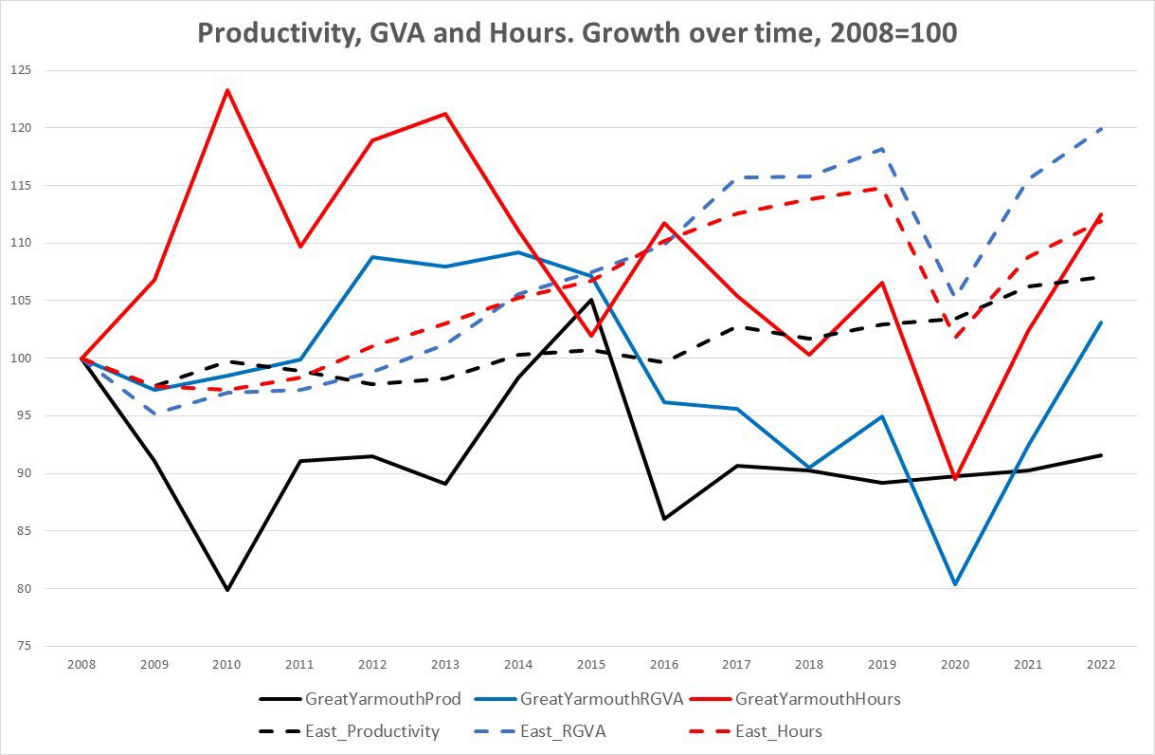
Note: ITL3 data is for Norwich and East Norfolk which includes Norwich, Broadland and Great Yarmouth. Also see https://www.ons.gov.uk/explore-local-statistics/areas/E07000145-great-yarmouth/indicators.

Table 3: Norwich and East Norfolk Workplace and Residents Flows, Census 2021

Workers	**Great Yarmouth**	**Norwich**	**Broadland**	**East Suffolk**
People working in LA	38,093	72,770	55,515	104,965
Workers travelled within the LA	17,629 (46%)	19,204 (26%)	12,168 (22%)	42,949 (41%)
Lived and worked in LA	31,021 (81%)	47,105 (65%)	41,064 (74%)	86,829 (83%)
Travelled from another LA	7,072 (19%)	25,665 (35%)	14,451 (26%)	18,136 (17%)
Most popular areas commuted from	East Suffolk (3,382) Broadland (1,255) South Norfolk (740)	Broadland (10,745) South Norfolk (7,112) Breckland (2,321)	Norwich (5,829) South Norfolk (2,373) North Norfolk (2,323)	Ipswich (6,234) Great Yarmouth (2,841) South Norfolk (2,455)
Residents	**Great Yarmouth**	**Norwich**	**Broadland**	**East Suffolk**
Total Population	100,179	143,217	132,238	247,100
Working people living in the LA	41,126	65,719	62,577	106,362
People who worked from home or no fixed place of work	13,392 (33%)	27,901 (42%)	28,896 (46%)	43,880 (41%)
Travelled to another area	10,105 (25%)	18,614 (28%)	21,513 (34%)	19,533 (18%)
Most popular areas commuted to	East Suffolk (2,841) Broadland (1,601) Norwich (1,427)	South Norfolk (7,435) Broadland (5,829) Breckland (1,350)	Norwich (10,745) South Norfolk (4,180) North Norfolk (2,770)	Ipswich (6,577) Great Yarmouth (3,382) South Norfolk (1,906)

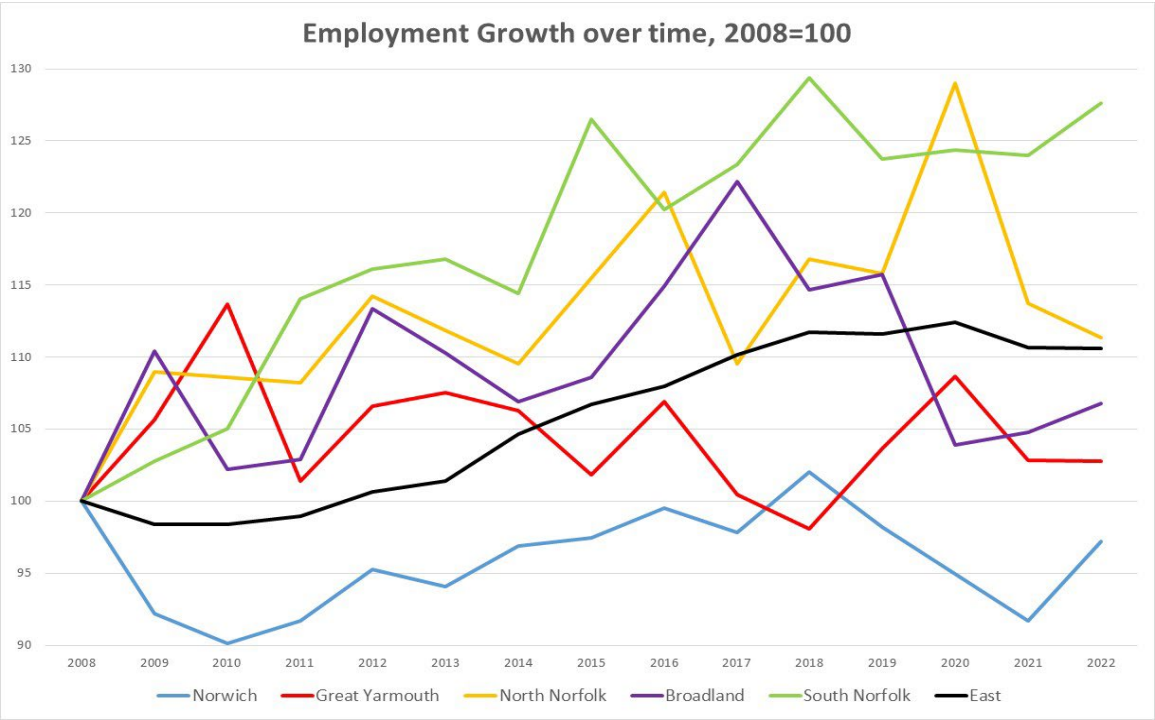
Source: ONS, https://www.ons.gov.uk/visualisations/censusorigindestination/, Census Origin Destination Visualisation.

Figure 2: Great Yarmouth and the East of England, growth in productivity, output and hours



Source: ONS (2024a and 2024b), Local Authority GDP and Productivity.

Figure 3: Great Yarmouth, Norwich and East of England, growth in employment



Source: ONS (2024b), Local Authority Productivity Jobs.

Health and wellbeing indicators in Table 2 include the economic activity rate and then the share of the inactive population that is inactive due to illness, along with the working population share. The economic activity rates are calculated as those that are active in the labour market (either employed or unemployed) as a share of the working age population (aged 16-64 years). Great Yarmouth has a lower activity rate at 70.7% compared to that of the East of England at 80.6% in 2023. The active population has been increasing. The share of the inactive population who are inactive due to long-term ill health is 28.4% in 2023, this in the ITL3 region of Norwich and East Norfolk (the sample was too small for this to be calculated in Great Yarmouth[11]), this has decreased since 2022. The dependency ratio (calculated as the share of population <16 and >64/ share of 16-64 year olds), is 58.3% in Great Yarmouth lower than 61.3% for the East of England.

The final block on Table 2 notes information on investment, infrastructure and connectivity. In Great Yarmouth the 5G coverage[12] at 99.7% of the area is higher than the East of England at 87.9%. The gigabit broadband connectivity[13] is just below the East of England at 83.5%. Whole economy investment (Gross Fixed Capital Formation, GFCF) per job and components of this include investment in Information and Communication Technology (ICT) and intangibles[14], both per job. Norwich and East Norfolk are below the East of England average for the whole economy and intangible investment per job in 2020. The ICT investment per job in 2020 is higher in Norwich and East Norfolk than the East of England average. These series are from the ONS (2022).

3. Sector Strengths

We analyse two data sets to gauge industrial strategy sector strengths in Norfolk and Suffolk. In Table 4 we present analysis by The Data City using their Real-time Standard Industrial Classification (RTICs) codes gathered from searching firms' websites for sector keywords. Then we present employment sector specialisation results from the Business Register and Employment Survey in Table 5.

Table 4 shows the specialisation in the eight priority sectors outlined in the Government's Modern Industrial Strategy 2035 for local authorities in Norfolk and Suffolk. The location quotients (LQ) are calculated by taking the number of operating addresses of companies classified in the sectors (company counts) as input data. A location quotient greater than one shows the local authority has a greater strength in that sector than the UK average. From Table 4, we see that Great Yarmouth's greatest specialisation is advanced manufacturing with a location quotient of 2.33, followed by clean energy industries digital with LQ of 2.27. Great Yarmouth also has specialism in Professional and Business services and Life Sciences with LQs over 1.

[11] https://www.nomisweb.co.uk/reports/lmp/lad/1778385061/report.aspx?town=great%20yarmouth
[12] Percentage of area with 5G coverage from at least one mobile network provider.
[13] % of premises that have coverage from a gigabit-capable service (download speeds of 1,000 Mbps or more).
[14] Within intangibles are research and development; mineral exploration and evaluation; computer software and databases and entertainment, literary or artistic originals.

Table 4: Great Yarmouth Industrial Strategy Sector's Location Quotients

IS-8 Sector	AM	CE	CI	D	DT	FS	LS	PBS
Great Yarmouth	**2.33**	**2.27**	**0.59**	**0.75**	**0.74**	**0.32**	**1.16**	**1.18**
Norwich	0.69	0.78	1.23	0.66	1.45	1.23	0.93	1.26
Broadland	1.32	1.77	0.84	0.83	0.95	1.16	0.62	0.97
Breckland	1.71	0.97	0.74	0.16	0.54	0.63	0.78	0.97
South Norfolk	1.7	1.11	0.92	0.8	1.29	0.8	1.79	1.12
King's Lynn and West Norfolk	1.38	1.29	0.81	0.49	0.5	0.56	0.76	0.82
North Norfolk	1.57	1.21	0.83	0.32	0.32	0.47	0.95	0.85
Ipswich	0.73	0.88	0.98	0.47	0.78	0.83	0.97	0.95
Babergh	1.81	1.74	0.96	0.45	0.72	0.83	0.76	1.09
Mid Suffolk	1.43	1.62	0.8	0.5	0.68	0.6	0.83	0.89
East Suffolk	1.1	1.05	0.93	0.7	0.49	0.73	0.59	0.9
West Suffolk	0.98	0.81	0.81	0.43	0.62	0.57	0.76	0.82

Source: The Data City Real Time SIC Codes, https://thedatacity.com/real-time-sic-codes/. Key to sectors: Advanced Manufacturing (AM); Clean Energy (CE) Industries; Creative Industries (CI); Defence (D); Digital and Technology (DT); Financial Services (FS); Life Sciences (LS); Professional and Business Services (PBS).

We also compare the relative specialisation for the employment sectors in Great Yarmouth, compared to Great Britain (GB) in Table 5. A location quotient greater than one indicates higher specialisation than the GB level of employment in that sector. Table 5 shows the highest 20 location quotients for Great Yarmouth employment sectors at the 2-digit SIC code level (average between 2015-23) along with the employment numbers in 2015, 2023, the 2023 employment sector share and the growth rate between 2015 and 2023.

In Great Yarmouth we can see from Table 5 that the total number in employment has increased by 0.6% between 2015 and 2023. The largest location quotients for employment is in mining and support services, this along with the extraction of natural gas signifies the importance of fossil fuels imported from the gas pipeline. The importance of tourism to Great Yarmouth is apparent in the large amount of people employed in retail, accommodation, food services, sports and amusements and gambling. Evidence of the employment in activities related to offshore wind farms is within engineering, manufacture, repair and installation of equipment sectors. All of these contribute to the high advanced manufacturing LQ in Table 4.

The OECD (2016) found that regions with larger tradeable sectors[15] were able to catch up to the frontier regions quicker than those regions with lower shares that were diverging. Tradeable sectors bring money into the community, together with the wages of residents who commute to other parts of the region. We calculate the share of tradeable sectors for Great Yarmouth and East of England in Table 6 we analyse the GVA sector shares for 2023.

[15] The OECD (2018) classifies tradeable sectors as the following: agriculture (A), industry (BCDE), information and communications (J), financial and insurance activities (K) and other services (RSTU). The remaining sectors are then classed as non-tradeable. The OECD defines tradeable sectors as "those that produce goods and services that can traded across regions and international borders". Firms can operate in sectors that are tradeable, although they may not actually engage in trade, but they are exposed to competition from abroad. See Chapter 2, page 59 in OECD (2018).

Table 5: Great Yarmouth Employment Sectors by Highest Location Quotients

Sector	2015	2023	Share in 2023	Growth Rate 2015-2023 (%)	Location Quotient 2015-23 (average)
09: Mining support service activities	400	100	0.25	-75	7.43
55: Accommodation	3,000	3,500	8.79	16.6	5.55
77: Rental and leasing activities	1,250	700	1.76	-44	3.87
92: Gambling & betting activities	500	400	1	-20	3.78
26: Manufacture of computer, electronic and optical products	350	300	0.75	-14.3	3.11
06: Extraction of crude petroleum and natural gas	50	50	0.13	0	3.07
33: Repair and installation of machinery and equipment	400	400	1	0	2.76
38: Waste collection, treatment and disposal activities; materials recovery	900	400	1	-55.6	2.673
71: Architectural and engineering activities; technical testing and analysis	2,000	1,500	3.77	-25	2.672
28: Manufacture of machinery and equipment n.e.c.	600	500	1.26	-16.7	2.40
27: Manufacture of electrical equipment	175	225	0.57	28.6	2.37
86: Human health activities	4,500	7,000	17.6	55.6	1.84
21: Manufacture of basic pharmaceutical products and pharmaceutical preparations	50	100	0.25	100	1.64
93: Sports activities & amusement and recreation activities	800	800	2	0	1.44
87: Residential care activities	1,500	1,250	3.14	-16.7	1.34
47: Retail trade, except of motor vehicles and motorcycles	5,000	4,500	11.3	-10	1.25
56: Food and beverage service activities	3,000	3,000	7.54	0	1.24
91: Libraries, archives, museums and other cultural activities	125	125	0.31	0	1.22
14: Manufacture of wearing apparel	30	20	0.05	-33.3	1.127
31: Manufacture of furniture	175	100	0.25	-42.9	1.126
Total	39,575	39,805	100	0.6	

Source: Business Register Employment Survey from Nomis https://www.nomisweb.co.uk/ at the 2 digit level Standard Industrial Classification code.

Table 6 presents the Gross Value Added share of the sectors in Great Yarmouth, along with employees (from Nomis[16]) and compared to the East of England. Great Yarmouth has 30% share of GVA in tradeable sectors, compared to the East of England share of 26%, so here there is great potential for Great Yarmouth.

Table 6: Great Yarmouth GVA and Employee Shares of Sectors in 2023

Sector	Great Yarmouth GVA	Great Yarmouth Employees	East of England GVA	East of England Emp.
AB: Agriculture, forestry & fishing; mining & quarrying	0.85	0.4	1.23	0.1
C: Manufacturing	10.96	7.9	10.64	7.3
DE: Electricity, gas, water; sewerage & waste management	11.8	1.3	2.32	1
J: Information & communication	1.89	0.9	4.02	3.4
K: Financial & insurance activities	0.8	0.7	4.81	2
R: Arts, entertainment & recreation	2.03	3.9	1.12	2.4
S: Other service activities	1.23	1.1	1.78	2.1
T: Activities of households	0.09	-	0.07	-
Share of Tradeable Sectors	**30**	**16.2**	**26**	**18.3**
F: Construction	4.49	3.9	9.39	6.1
G: Wholesale & retail trade	8.64	15.8	11.7	15
H: Transportation & storage	2.5	3.3	4.32	6
I: Accommodation & food services	6.14	18.4	2.52	7.4
L: Real estate activities	13.13	1.3	14.53	2.1
(Owner-occupiers' imputed rental)[17]	(11.19)		(11.27)	
(Excluding imputed rental)	(1.94)		(3.26)	
M: Professional, scientific & technical	6.14	5.9	7.43	8.7
N: Administrative & support services	4.67	4.6	6.04	11.2
O: Public administration & defence	3.12	2.4	4.16	3.5
P: Education	4.91	7.9	6.32	8.9
Q: Human health & social work	16.53	23.7	7.6	12.6
Total GVA in 2023 (£mn, 2022 prices)	**2,117**	**38,000**	**189,294**	**2864000**

Source: ONS (2025c) and ONS (2025d) Regional GVA (balanced) by industry, East of England.

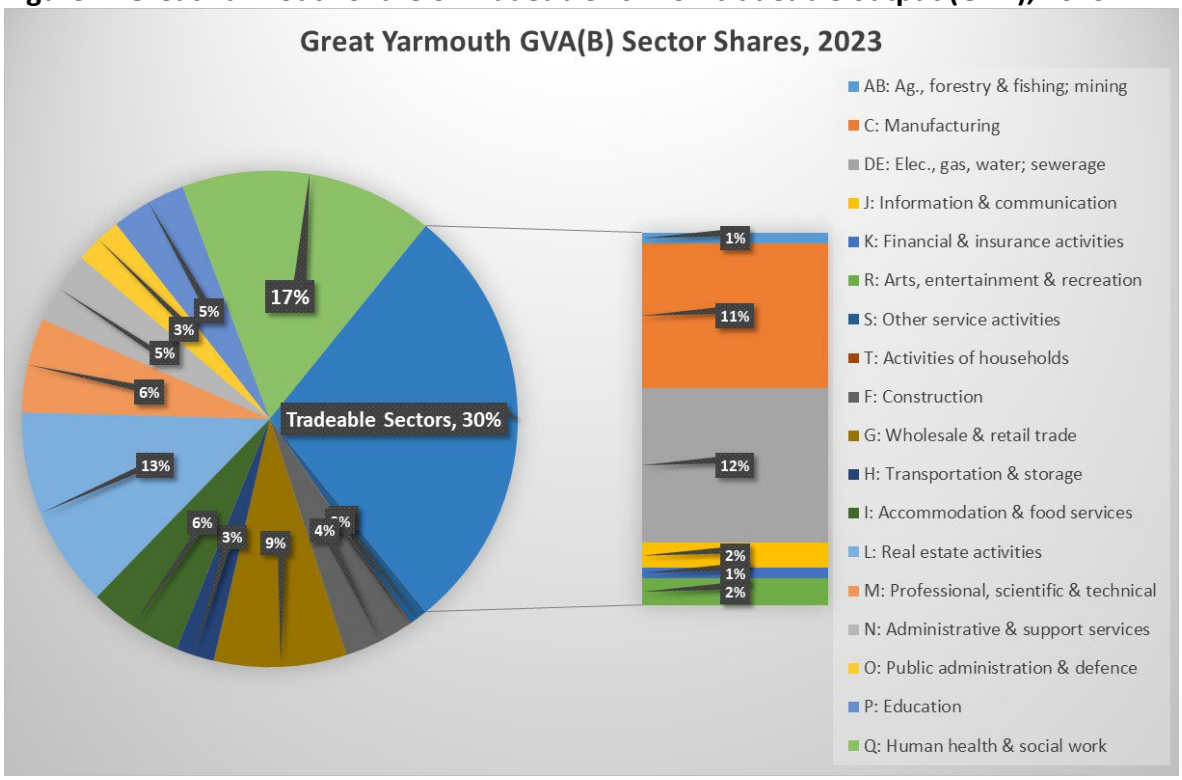
In Table 6 we see that manufacturing across all sub-sectors accounts for 7.9% share of employment in Great Yarmouth, with 11% share of GVA, the share of this sector has grown over this time from 6.8% in 2000. The electricity, gas, water; sewerage & waste management

[16] https://www.nomisweb.co.uk/reports/lmp/lad/1778385061/report.aspx?town=great%20yarmouth

[17] ONS use imputed rental data to estimate the housing services that households consume when they do not rent their residence. Imputed rent is the rental price that an individual would pay for an asset they own. The methodology ONS use to calculate imputed rent uses the share of the different types of housing stock multiplied by median house prices of an area. In Table 6 a large share of sector L (real estate activities) is divided into the estimates for imputed rent and excluding it leaving the real estate sector a smaller share.

(sector DE) share of the economy has increased substantially over 2022-23, increasing from a 5.4% share of the economy in 2021 to 13.5% in 2022 and then 11.8% in 2023[18]. The increase in this sector has contributed to the increase in GVA in Great Yarmouth since 2021 (see Figure 2), although this sector only employs 1.3% of the resident population[19]. The largest sector of employment is in human health (this includes the health service, residential care and social work activities), contributing 16.5% to GVA. The second largest employment sector is accommodation and food services, which contributes a lower share to GVA of 6.1%. Figure 4 presents a pie chart for Great Yarmouth's sector shares of GVA, with the largest share of value in tradeable sectors from electricity, gas, water; sewerage & waste management at 12%.

Figure 4: Great Yarmouth Share of Tradeable vs. Non-tradeable output (GVA), 2023



4. Capital Assets

Experimental Data Tool

We compare Great Yarmouth with the 6 other local authorities in Norfolk and the 5 in Suffolk. The data tool is calculated with the method outlined in Silva Ruiz et al (2026) for the capitals of physical, social, financial, human, intangible and natural in the following tables. Indicator data for 361 UK local authority districts is from the ONS (2025b) are grouped into physical,

[18] The large increase in the DE sector is most likely due to the increase in the gas prices in 2022 following the Russian invasion of Ukraine. The ONS reports a retail price index price spike over 2022-2023 in the annual change, see: https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/czda/mm23.

[19] The Shell Bacton Gas Plant located 20 miles from Great Yarmouth supplies up to a third of the UK's gas supply as well as importing and exporting gas from Europe, see: https://www.shell.co.uk/about-us/what-we-do/oil-and-gas/bacton-gas-plant.html.

social, financial and human capitals (intangible and natural data sources are noted below). The strength of the capitals is assessed by ranking all UK local authorities. We present a colour-coded figure for the strength of the capitals at the beginning of this report.

In Table 7 we present the physical capital indicators in the experimental data tool (see Silva Ruiz et al, 2026, for the list of the variable sources). We compare five indicators to represent physical capital including: 2024 median house prices, 2023 electricity consumption, 2024 gigabit capable broadband coverage, 2023 resident population density and 2023 access to amenities indicator with the number of supermarkets per 10,000 of population. The rankings of the authorities are in right hand column. Great Yarmouth ranks 277/361 and is in the second half of the local authority's ranking for physical capital assets. In Table 7, Ipswich (the county town of Suffolk) ranks the highest in the top 30% of the physical capital index and Norwich (the cathedral city and capital of Norfolk) is in the top 50% compared to other UK local authorities.

Table 7: Physical Capital Indicators in Norfolk and Suffolk

Local Authority	Median House Prices (£), 2024	Electricity Consumption (kwh/meter), 2023	Broadband availability (Gb), 2024	Population Density (resident/ km sqrd), 2023	Supermarkets (per 10,000 population), 2023	UK Rank
Great Yarmouth	**219,574**	**3369.5**	**69.4**	**575**	**3.41**	**277**
Norwich	241,541	2800.2	90.3	3754	3.34	148
Broadland	325,665	3497.0	59.8	246	2.35	294
Breckland	274,166	3844.6	57.4	111	2.47	274
South Norfolk	319,529	3846.1	55.2	162	2.04	275
King's Lynn & West Norfolk	270,166	4024.1	57.9	109	2.2	249
North Norfolk	308,189	3835.1	36	107	2.52	335
Ipswich	229,336	3114.3	94.1	3531	3.72	92
Babergh	328,886	3912.6	60.7	161	2.82	189
Mid Suffolk	321,422	4118.2	50.4	124	2.24	237
East Suffolk	295,890	3468.8	68.2	197	2.89	251
West Suffolk	309,354	3608.0	68.5	180	2.45	234
East Median	336,058	3607.9	80.9	512	2.45	
UK Median	277,547	3315.9	83.7	575	2.71	
Productivity Correlation:						
East (N=45)	0.57	0.26	0.15	-0.1	-0.12	
UK (N=361)	0.51	0.19	0.13	0.25	0.22	

Sources and Methods: see Silva Ruiz et al (2026).

We compare the indicators in Table 7 to the East of England and UK median. Great Yarmouth has lower house prices, electricity consumption and broadband availability than the East of England median. Great Yarmouth has higher population density and access to supermarkets

per 10,000 of the population than the East of England median. The last 2 rows of Table 7 show the cross-correlation coefficients of 2023 productivity (GVA per hour) with each of the indicators for the 45 authorities in the East of England and for all local authorities in the UK. Here we see that median house prices have the highest correlation with productivity of 0.51 for all local authorities in the UK. This is higher for the East of England authorities at 0.57, so there is an association between higher median house prices and higher productivity levels.

The social capital experimental data tool indicators are presented in Table 8. These include the 2023 share of children living in relative poverty[20], the population change between the 2011 and 2021 Censuses, an indicator of culture with the 2021 museums per 100,000 population and then results from the ONS local authority well-being survey for anxiety (inverse of 10-anxiety is used), happiness and life satisfaction. For these indicators Great Yarmouth scores in the top 40% of the social capital index. The Broadland and Mid Suffolk local authorities are in the top 5% for social capital.

Table 8: Social Capital Indicators in Norfolk and Suffolk

Local Authority	Children in relative poverty (%), 2023	Population Change (%), 2011-2021	Museums (per 100,000 population), 2021	ONS well-being survey 2022/23			UK Rank
				Anxiety	Happiness	Life satisfaction	
Great Yarmouth	**22.7**	**2.5**	**8.02**	**2.86**	**7.71**	**7.54**	**131**
Norwich	24.2	7.9	4.86	4.37	7.07	7.3	347
Broadland	10.8	5.4	5.31	2.27	7.71	7.85	13
Breckland	16.1	7.8	7.07	3.05	7.19	7.75	122
South Norfolk	10.5	12.6	7.75	3.35	7.65	7.52	48
King's Lynn and West Norfolk	17.7	4.5	5.83	3.31	7.45	7.56	181
North Norfolk	18	1.4	26.22	3.36	7.21	7.67	151
Ipswich	23	4.5	3.58	3.09	7.21	7.62	221
Babergh	13.2	5	8.66	2.79	7.81	7.68	40
Mid Suffolk	11.5	5.8	6.82	2.73	7.71	7.95	18
East Suffolk	15.9	2.6	13.01	2.76	7.86	7.78	36
West Suffolk	11.2	5.1	6.11	3.59	7.4	7.54	176
East Median	11.4	6.9	4.64	3.24	7.47	7.54	
UK Median	18	5.2	4.02	3.25	7.42	7.48	
Productivity Correlation:							
East (N=45)	-0.46	0.03	-0.26	-0.16	-0.1	-0.11	
UK (N=361)	-0.36	0.21	0.08	0.17	-0.09	-0.02	

[20] This is the percentage of ch/ildren under 16 who are living in a relative low-income household. In these statistics, a family must have claimed Child Benefit and at least one other household benefit (Universal Credit, tax credits or Housing Benefit) to be considered as low income. The inverse of this measure is used.

The indicator of concern for Great Yarmouth in Table 8 is the high share of children in relative poverty (22.7%), almost double the East of England median. Population change between 2011 and 2021 is 2.5% in Great Yarmouth lower than the 6.9% for the East of England median. All other measures are better than the East of England, with many more museums due to the strong tourism industry. This variable is negatively correlated with productivity in the East of England with a coefficient of -0.26. In the well-being survey, anxiety is lower in Great Yarmouth than for the East of England median, happiness is higher and life satisfaction at the same level as the median. The well-being measures are negatively correlated with productivity in the East. For more on social capital see Haldane and Halpern (2025).

Table 9: Financial Capital Indicators in Norfolk and Suffolk

Local Authority	Prosperity (GDP per capita, £), 2022	Income per head (GDHIph, £), 2022	Gross Median Weekly Pay (£), 2024	Businesses births (%), 2023	High growth Business (%), 2023	UK Rank
Great Yarmouth	**24,821**	**18,815**	**543.7**	**9.8**	**2.8**	**336**
Norwich	34,320	17,993	555.8	11.8	7.0	83
Broadland	37,170	22,208	574.9	9.1	3.1	317
Breckland	22,991	19,999	560.3	8.8	3.7	322
South Norfolk	26,311	22,787	657.9	9.4	3.9	188
King's Lynn and West Norfolk	25,397	20,369	549.3	9.1	5.3	262
North Norfolk	20,433	21,953	538.7	8.3	4.3	318
Ipswich	36,583	18,240	591.2	13.3	3.5	155
Babergh	24,694	24,841	594.2	8.9	5.0	192
Mid Suffolk	26,933	22,826	602.1	8.8	3.3	297
East Suffolk	27,263	22,763	545.4	8.4	3.9	321
West Suffolk	36,196	21,196	585.1	11.8	3.4	203
East Median	33,624	22,919	645.7	10.4	4.1	
UK Median	29,380	21,359	603.8	10.4	4.2	
Productivity Correlation:						
East (N=45)	0.68	0.54	0.47	-0.12	0.01	
UK (N=361)	0.27	0.48	0.57	0.0	0.33	

The data tool for financial capital in Table 9 includes: prosperity in 2022 (GDP per capita), 2022 Gross Disposable Household Income per head (GDHIph) and the 2024 gross median weekly pay of workers in the borough (this differs from resident wages shown in the scorecard tables as includes full and part-time working residents). The share of new businesses created

in 2023[21] and the 2023 rate of high growth businesses[22] per 10,000 population. In Table 9, we see that Great Yarmouth is in the bottom 10% of the financial capital index with ranking 336/361. Great Yarmouth has lower measures for all the indicators than the East of England median.

Human capital indicators for the data tool are shown in Table 10. The variables included are the 2023 employment rate, 2023 share of the population with level 3 skills and above, the dependency ratio[23] in 2023, 2018-20 healthy life expectancy (male and female age in years combined) and the 2023 proportion of adults who smoke (the inverse of this measure is used in the tool, 100-CigSmokers).

Table 10: Human Capital Indicators in Norfolk and Suffolk

Local Authority	Employment Rate (%) in 2023	Skills (RQF level 3+) in 2023	Dependency Ratio in 2023	Healthy Life Expectancy, 2018-20	Cigarette Smokers (%) in 2023	UK Rank
Great Yarmouth	**67.9**	**52.8**	**0.72**	**63.4**	**11.1**	**321**
Norwich	82.7	76.8	0.44	63.4	15.4	61
Broadland	79	63.9	0.73	63.4	10.7	215
Breckland	72.6	58.6	0.72	63.4	9.5	262
South Norfolk	77.7	75.2	0.73	63.4	11.5	181
King's Lynn and West Norfolk	79.8	58.8	0.75	63.4	17.6	285
North Norfolk	67.5	63.6	0.9	63.4	6.5	306
Ipswich	85.9	73.2	0.59	65.7	9.4	43
Babergh	69.7	51.5	0.76	65.6	11.8	310
Mid Suffolk	66.1	58.7	0.71	65.7	9.7	270
East Suffolk	79.1	55	0.79	65.6	9.1	240
West Suffolk	77.3	55.7	0.64	65.7	13.5	228
East Median	77.7	64.4	0.63	65.1	10.7	
UK Median	76.5	66.7	0.63	63.4	11.4	
Productivity Correlation:						
East (N=45)	0.14	0.38	-0.18	0.29	-0.31	
UK (N=361)	0.18	0.28	-0.34	0.31	-0.25	

Great Yarmouth is in the lower end the human capital index with ranking 321/361, all indicators are worse than the East of England median. Ipswich and Norwich are in the top 20% for human capital. There is a positive correlation between productivity and level 3 and above skills of 0.38 for East of England local authorities, above the UK correlation coefficient.

[21] This is the share of newly registered businesses out of the total active business population.

[22] High growth businesses have an average growth in employment of greater than 20% per year over a three-year period. This variable shows the share of high growth businesses as a percentage of active businesses with 10 or more employees.

[23] The dependency ratio is the non-working age population to working age population (16-64 years).

As noted in the Scorecard (Table 2), Great Yarmouth has been increasing its share of skills in the working population over time. The share of smokers is negatively correlated with productivity in the East of England at -0.31.

Intangible capital indicators for the data tool are shown in Table 11. The variables include two variables from the Data City[24] to represent the concentrations of innovative and digital firms in the local authority areas. The Data City train its machine learning technology using the website text of companies which spend heavily on research and development, producing a language model that identifies the shared language patterns across all companies the Data City has collected information on[25]. For example, with the innovation score, this language model includes keywords like "research," "cutting-edge," and "design thinking" but also other less common keywords, such as "apprenticeship" or "training." The model is then used to score all the Data City companies' website text, identifying those that use the same language. A location quotient is calculated comparing the share of companies with innovation attributes to the full sample of companies and compares this to the share of these companies at the UK level.

The digitalisation location quotient also follows a location quotient approach, where the Data City calculate the concentration of firms working on digital activities in each local authority compared to the UK's average. They obtain the total number of companies working in digital activities using the Real-Time Industrial Classification (RTIC), which is The Data City's machine learning-based company classification methodology. RTICs are output datasets that group all companies that describe their activity similarly. The model is trained with a set of company websites representative of the digital sectors. Like the Innovation Score calculation process, the algorithm creates a language model that defines the shared linguistics by the company websites and uses it to score the rest of the company websites against it. So, for example, all companies developing Artificial Intelligence technologies can be grouped in a dataset. The Data City has several RTICs representing digital sectors[26].

The remaining two indicators in the intangible capital index are from Beauhurst's (2024) Local Growth Index. These include the number of registered patents to firms in an area and the number of firms receiving InnovateUK grants. Both indicators are then divided by the number of registered companies in the local authority.

As shown in Table 11, Great Yarmouth is in the bottom 20% of the intangible capital index, ranking 318/361. All the indicators are below the East of England medians. There is promise with Norwich in the top 30% of the intangible capital index so there is much potential for collaboration with the energy-focused business incubator on South Denes.

[24] These variables are discussed in more detail in the TPI Productivity Lab blog: https://www.productivity.ac.uk/the-productivity-lab/the-digitalisation-and-prevalence-of-innovative-practices-in-firms-in-mayoral-combined-authorities/

[25] https://thedatacity.com/blog/introducing-our-company-innovation-measure/

[26] The RTICs selected are: Artificial Intelligence, Cyber, Cryptocurrencies Economy, Data Intermediaries, Design and Modelling Technologies, Digital Creative Industries, E-commerce, Fintech, Gaming, Immersive Technologies, Internet of Things, SaaS, Software Development, Streaming Economy.

Table 11: Intangible Capital Indicators in Norfolk and Suffolk

Local Authority	Innovation LQ	Digital LQ	Patents/Firms (1000)	InnovateUK Grants/Firms (1000)	UK Rank
Great Yarmouth	**2.79**	**0.6**	**3.02**	**2.09**	**318**
Norwich	3.63	2.52	2.74	3.11	94
Broadland	3.1	0.92	3.27	2.53	256
Breckland	2.76	0.81	4.69	1.88	246
South Norfolk	3.16	1.54	4.77	4.91	97
King's Lynn and West Norfolk	1.96	0.9	3.98	2.36	303
North Norfolk	2.49	0.82	4.19	4.19	214
Ipswich	3.26	1.15	2.71	1.71	269
Babergh	2.91	1.14	4.66	2.69	184
Mid Suffolk	2.51	1.18	4.29	4.45	172
East Suffolk	2.9	1	3.33	3.01	239
West Suffolk	3.49	1.29	4.38	2.73	153
East Median	3.26	1.29	3.33	2.36	
UK Median	3.21	1.33	3.27	2.86	
Productivity Correlation:					
East (N=45)	0.32	0.16	0.09	0.09	
UK (N=361)	0.52	0.36	0.13	0.11	

Table 12: Natural Capital Indicators in Norfolk and Suffolk

Local Authority	Industry	Commercial	Public Sector	Domestic	Transport	LULUCF Net Emissions	Agriculture	Waste	UK Rank
Great Yarmouth	**23.5**	**38.0**	**17.9**	**119.9**	**124.2**	**10.3**	**26.7**	**23.3**	**114**
Norwich	56.0	69.7	43.4	151.2	117.0	11.7	11.8	32.8	336
Broadland	92.4	49.9	11.8	177.5	241.2	60.3	132.7	15.1	153
Breckland	85.7	33.1	10.4	183.7	339.6	51.0	323.9	54.4	110
South Norfolk	55.4	60.1	19.0	188.3	356.3	24.9	229.6	38.3	120
King's Lynn and West Norfolk	157.4	39.8	8.2	212.4	341.4	523.5	376.6	43.6	221
North Norfolk	46.9	46.5	11.2	155.4	196.4	41.2	201.2	17.4	81
Ipswich	28.4	49.4	24.8	148.9	107.8	1.7	3.8	81.1	296
Babergh	53.0	25.3	6.4	128.4	209.7	-10.3	90.8	12.7	34
Mid Suffolk	82.3	38.5	13.7	141.7	251.0	45.4	179.7	12.4	90
East Suffolk	135.1	97.5	21.8	325.2	381.3	2.1	229.6	44.1	58
West Suffolk	362.9	101.8	43.1	225.1	389.3	68.7	206.8	95.7	126
East Median	48.5	54.9	17.7	177.5	250.5	2.0	47.1	43.6	
UK Median	75.8	66.6	23.2	188.3	263.0	0.2	44.8	38.1	
Prod. Corr.:									
East (N=45)	-0.12	0.1	0.07	-0.04	0.16	-0.14	-0.17	0.05	
UK (N=361)	-0.05	0.29	0.07	-0.05	-0.004	-0.02	-0.17	-0.01	

Source: DESNZ (2024). Greenhouse gas emission estimates in kt CO2e in 2022.

The indicators in Table 12 present the experimental data tool of natural capital. The indicators are from the Department from Energy Security and Net Zero (DESNZ, 2024). Table 12 shows the territorial greenhouse gas emission estimates for the total of each sector. The greenhouse gas emissions are measured in kilo tonnes of carbon dioxide equivalent (kt CO2e). The category for Land Use, Land-Use Change and Forestry (LULUCF) covers the net emissions from land classes including: forest land; cropland; grassland; wetlands; settlements, other land and the pool of harvested wood products (when the emissions are negative they are being taken out of the atmosphere). The DESNZ (2024) report presents the emissions per capita and per square kilometre. To create the index each of the above categories is divided by land area in square kilometres before standardising.

Great Yarmouth is in the top 40% of the natural capital index. Babergh district is the top 10% of the natural capital index, this includes the Dedham Vale Area of Outstanding Natural Beauty across Suffolk and Essex. According to ONS (2021) Babergh has 7% of woodland coverage and Great Yarmouth has 6% woodland. Great Yarmouth has emissions lower than the East of England median for most categories (apart from the public sector emissions and LULUCF).

5. Qualitative Analysis

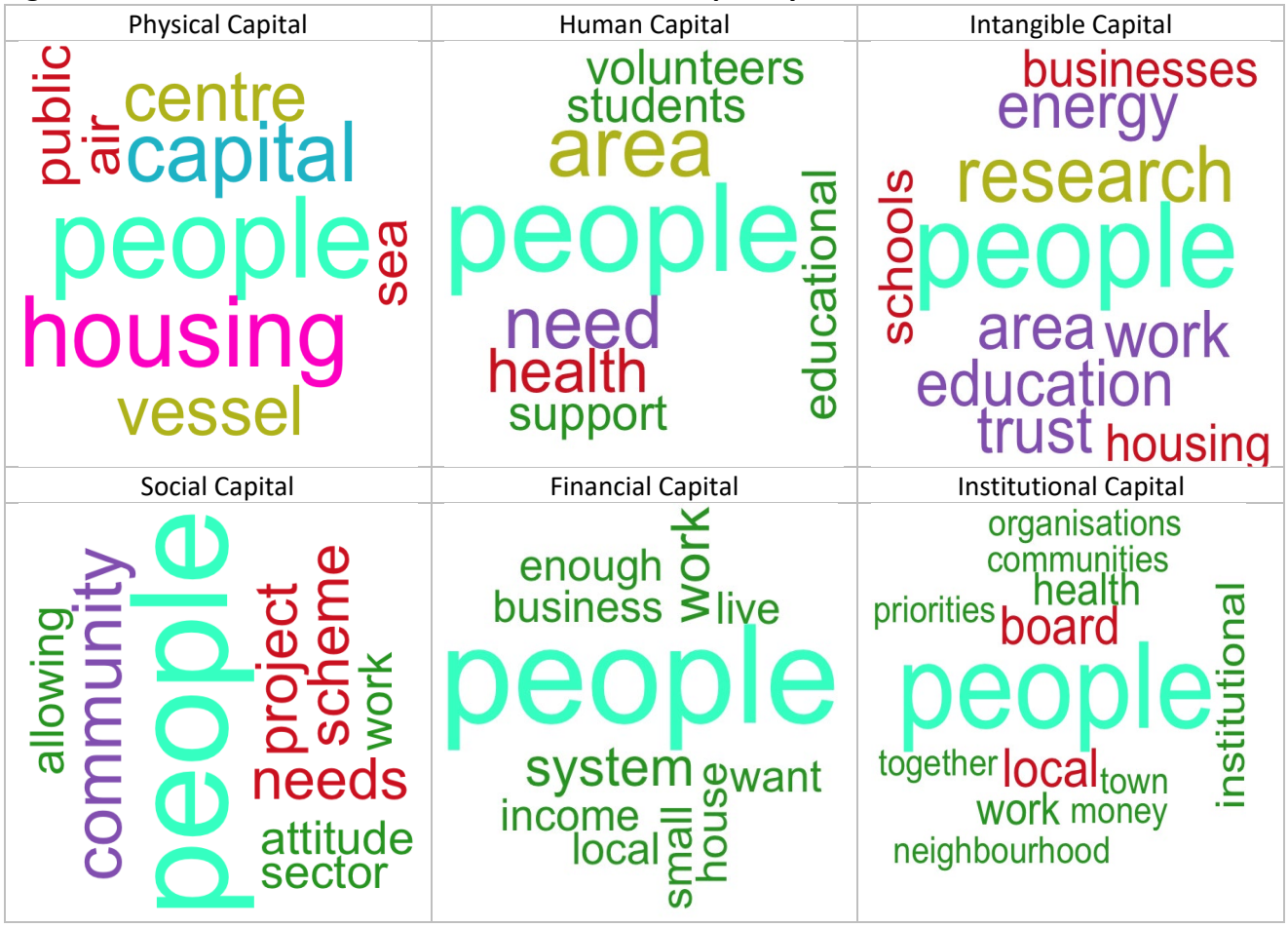
On 16th May 2025, the IPPC team, along with stakeholders invited by Great Yarmouth Council, held a workshop discussing the seven capitals. These members were selected to be representative of each of the capital asset areas as laid out in the introduction of this report. Following a brief introduction and baseline survey of all members present, the discussion on each individual capital area was limited to 10 minutes. The summary of each of those 10-minute discussions is displayed in the word clouds in Figures 5 and 6.

In Figure 5, we see that the first discussion on physical capital revolved around a people-focused approach. This is applied to the housing stock of the local area, as well as the access to the sea, port, resort and leisure industry. The potential for greater development of the offshore wind sector near Great Yarmouth, supported by local physical infrastructure and strategic location of the port are significant innovation, investment and employment opportunities for the area. The wealth of natural assets, access to coast, nature reserves and leisure facilities are all very valuable to tourists but need better perceptions and connections to the local community. The discussion continued along these lines on how to better connect more impoverished parts of the community to other regional urban centres and upgrading dwellings to tackle poor health outcomes.

In a similar vein, Figure 5 shows how the discussion on human capital also centred around the support of volunteer networks and the challenging educational and health needs and outcomes across the borough. These needs are complex and multidimensional, and the borough is working to alleviate these pressures on individuals while working with local business and education providers to improve employment prospects and jobs, such as in creative, cultural and seasonal industries, to enable greater retention of local talent.

Turning to more intangible knowledge-based assets in Figure 5, the stakeholders highlighted the rich mix of heritage buildings, reflecting the legacy leisure, entertainment and port industries, and the value of these for the local population and tourism. This also demonstrated the collaborative working of institutions within Great Yarmouth, but the need to communicate the shared narrative more widely. This also demonstrated the need to frame a cohesive narrative for Great Yarmouth moving forward. The area is also seeing investments in innovative industries such as offshore wind.

Figure 5: Word Cloud for the Great Yarmouth Workshop, May 2025



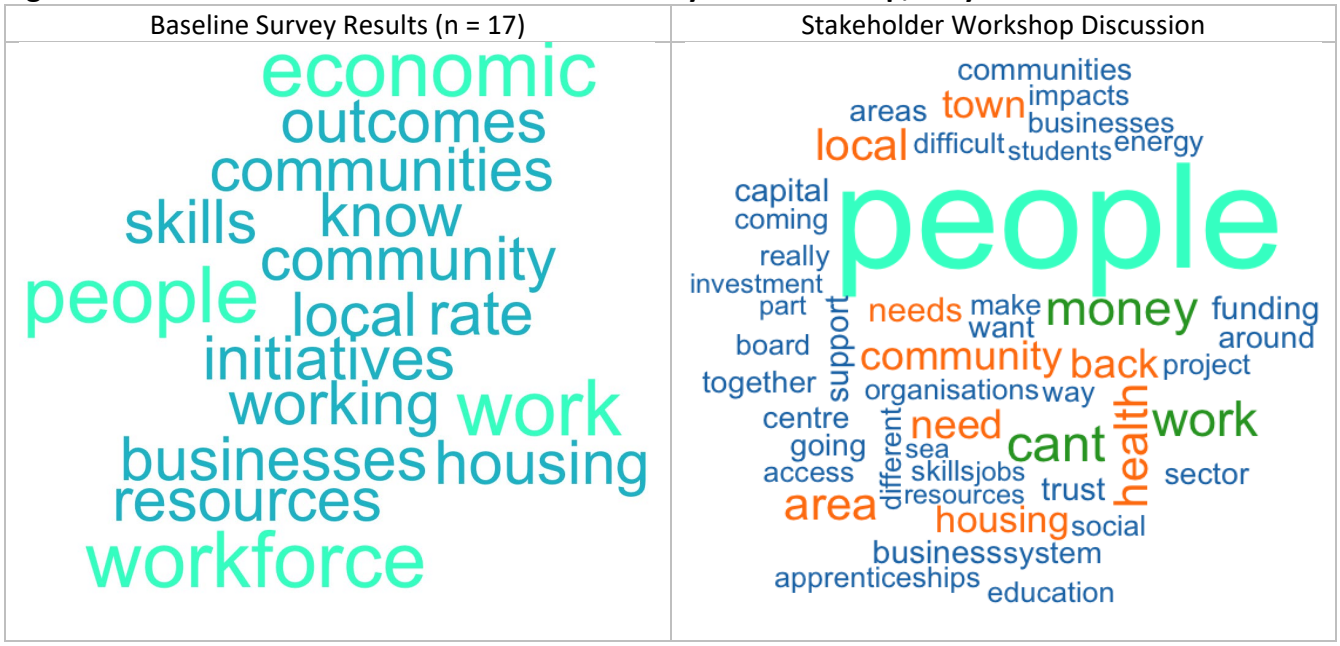
In Figure 5 community and the residents formed the main heart of the discussion on social capital, where participants expressed difficulties with short-term funding for charities and volunteers to continue supporting communities. This also has a knock-on-effect in terms of building trust among the local community about the durability of projects and the positive benefits they bring, particularly to vulnerable constituents. Some of these systemic issues stakeholders also related to problems with access to finance and investment. On the household-level, there are problems with financial literacy, although often those using local foodbanks are in work, so the persistence of low wage work and a lack of incentives to train due to a lack of alternative career options in the area is a significant challenge.

For local policymakers and businesses, the lack of a sufficient evidence-base on which investments to make into the community is a barrier to planning and development and undermines appetite for risk. This latter point became the central focus in the institutional section of the meeting, specifically about how to develop existing opportunities for greater collaboration and transition to more integrated and representative boards, as is already happening with the town deal board, health and wellbeing group, the apprenticeships project with the university, and local employment and skills plan. Nonetheless, stakeholders voiced concerns regarding the challenge of prioritising different courses of action given the complex mix of employment, health and wellbeing challenges, while improving the quality of life and pride of place for residents.

Figure 6 illustrates the results from the baseline survey and demonstrate how local policymakers and stakeholders view productivity and planning. In particular, the mobilisation of key resources, such as the workforce, skills, initiatives, businesses and the supporting infrastructure, such as housing. These resources are also thought about it terms of outcomes and the people in the community who implement policies on the ground.

The final box in Figure 6 shows how the stakeholder workshop was indeed very people-focused, on their needs for a healthy and supported community, in which trust needs to be developed, particularly by addressing the key employment, educational and health outcomes and needs, and investment challenges. Again, reframing narratives and reprioritising via new institutional relationships can put local stakeholders in a more evidence-based position to respond to these challenges and opportunities.

Figure 6: Word Cloud for the Great Yarmouth Survey and Workshop, May 2025



The remainder of this section outlines key insights drawn from qualitative research, highlighting the structural, social, and economic factors that influence Great Yarmouth's

development trajectory. These themes reflect the broad perspectives of local stakeholders and provide insights into the enablers driving progress and the persistent challenges that require targeted policy intervention. These are not presented in order of importance, nor should they be read in isolation.

Great Yarmouth and the Capitals

Great Yarmouth was described as having many positive attributes, including a rich culture, natural capital, a relaxed way of life, and high levels of social capital as local actors deliver activities that address social needs. However, there were also concerns raised around both internal and external perceptions of Great Yarmouth as a place that is struggling to find a new identity and path forward. This highlights how important these assets and community-led innovations are.

Leadership is seen as showing strong dedication to their communities and greater centralised coordination. This shared strategic direction will help to achieve broader, long-term progress**.**

The Borough Council plays an important role in the town's development, but it does not have the capacity to lead alone. Although the council is already working towards a collaborative approach with the town board and partnerships, this could be further strengthened to maximise broader regeneration efforts and improve the town's assets. In turn, this would also bolster Great Yarmouth's regional identity, particularly within the context of devolution and the need to balance local and regional development.

Integrated Training and Education Pathways and Opportunities

Great Yarmouth, whilst recognised as a nice place to live, does have challenges around attracting a highly skilled workforce, due to the town's geographic remoteness and competition from nearby cities like Norwich and Cambridge. In addition, there were concerns raised that although people may be receiving their training in the area, they do not tend to choose Great Yarmouth as their residence.

The hospitality sector in Great Yarmouth employs many people but is typically associated with low wages and limited progression opportunities. In contrast, the energy sector, particularly offshore oil, gas, and wind, demands high-quality skills and offers significantly better pay. This creates a mismatch between the skills available locally and the needs of high-skill industries.

Further education is underfunded, and many young people and adults face challenges that affect their ability to learn. Additionally, a significant number of residents who are eager to work face barriers such as low educational attainment and limited digital skills. Many lack access to computers and rely solely on mobile devices, which restricts their ability to engage with online opportunities.

There are working groups and boards that meet to plan how to support education and employment, including the local authority, schools, colleges, Chambers of Commerce, and sector-specific groups (this includes the Skills Taskforce, Norfolk Skills Board and the

Department for Work and Pensions). However, as this is a relatively new strategy, these could be communicated more widely to raise awareness across the Borough.

Governance, Strategy, and Coordination

There is an important dynamic between local and regional governance. There have been a number of changes to regional governance in recent years, and decisions have been made around regional alignment and membership, such as the closure of Local Enterprise Partnerships (LEPs). Such governance decisions highlight the need to balance local agency with cohesive regional development. Recent regional policy and structural changes appear to have affected Great Yarmouth's development, highlighting the need for stronger inter-county collaboration, better strategic alignment between funding mechanisms and local-regional objectives, and a more coherent and coordinated governance framework.

The Borough Council plays an important role in Great Yarmouth's development, but it cannot drive regeneration alone. As Great Yarmouth will be part of a new Mayoral Combined Authority, a coordinated regional strategy becomes an imperative. Continued fostering of collaboration across local and regional stakeholders, can better align its strengths and gain funding for regeneration, infrastructure and cultural investment.

Integrating Natural and Cultural Capital into Economic Development

Whilst natural and cultural capital are valuable in themselves, they also offer significant potential to drive social and economic development in Great Yarmouth. They can help shape a positive place narrative, attract investment, and support inclusive regeneration.

Arts and heritage play a key role in revitalising the town. This indicates that Great Yarmouth cultural organisations do successfully deliver impactful initiatives, which contribute meaningfully to the town's cultural identity and regeneration. In addition, Great Yarmouth has many natural capital assets, including wildlife and extensive high-quality beaches, and close proximity to The Norfolk Broads National Park. This means that both natural and cultural assets present Great Yarmouth with the opportunity to attract artists and enthusiasts, eco-tourists, nature enthusiasts, and broader investment in these areas.

Despite challenges, Great Yarmouth holds significant untapped potential. By integrating its cultural infrastructure and natural capital into destination planning and aligning skills development with sectoral growth, the town can shape its identity and drive inclusive, place-based regeneration. A joined-up approach across governance, education, and development sectors will be key to unlocking long-term social and economic benefits.

6. Conclusions

Great Yarmouth is at a pivotal moment in its development, with significant opportunities to enhance productivity through targeted, place-based strategies. While the town faces persistent challenges—including low productivity levels, lower physical, financial, intangible

and human capitals, plus high deprivation—it also possesses valuable assets in its cultural heritage, natural environment, and developing clean energy sector. To unlock its potential, Great Yarmouth must further consolidate coordinated approaches to strengthen human capital, improve infrastructure, and integrate cultural and natural assets into its economic narrative.

Improving productivity will require investment in skills and education aligned with sectoral needs, particularly in offshore energy and advanced manufacturing. Governance reform and regional coordination are essential to ensure long-term strategic planning and effective use of funding. By embedding cultural and natural capital into regeneration and tourism strategies, and enhancing digital and physical infrastructure, Great Yarmouth can build a compelling identity that attracts talent, investment, and visitors. Extending and further embedding collaborative, joined-up approaches across education, industry, and local leadership will be key to delivering inclusive and sustainable growth for the town and its communities.

References

Beauhurst (2024). The Local Growth Index: a Beauhurst encyclopedia of local business data. https://www.beauhurst.com/research/the-local-growth-index/

Coyle, D., van Ark, B. and Pendrill, J. (2023). The Productivity Agenda. Report No. 001. The Productivity Institute. Download: https://www.productivity.ac.uk/research/the-productivity-agenda-report/

DESNZ (2024). UK local authority greenhouse gas emissions estimates 2022. https://www.gov.uk/government/collections/uk-local-authority-and-regional-greenhouse-gas-emissions-national-statistics

DLUHC (2022). Levelling Up the United Kingdom, Department for Levelling Up, Housing and Communities White Paper, from: https://www.gov.uk/government/publications/levelling-up-the-united-kingdom

Donaldson, R., D. Jordan, J.D. Turner (2025) NI Productivity 2040: Addressing Northern Ireland's productivity gap for greater prosperity, Productivity Insights Paper No. 049, The Productivity Institute. https://www.productivity.ac.uk/research/northern-ireland-2025/

Emery, M., & Flora, C. (2006). Spiraling-up: Mapping community transformation with community capitals framework. Community Development, 37(1), 19–35. https://doi.org/10.1080/15575330609490152

Garcia, F., Gouma, R., Menukhin, O., Ortega-Argiles, R., Sarsfield, W. and Watson, R. (2024) TPI ITL3 Regional Productivity Scorecards – 2024 Edition, The University of Manchester. https://doi.org/10.48420/23791680. Blog: https://www.productivity.ac.uk/the-productivity-lab/the-2024-tpi-uk-itl3-productivity-scorecard-series/.

Garling, O. and B. S. Selvi (2025) East Anglia: Exploring Economic Strengths and Addressing Productivity Challenges, Productivity Insights Paper No. 046, The Productivity Institute. https://www.productivity.ac.uk/research/east-anglia-2025/

Haldane, A. and Halpern, D. (2025). Social Capital 2025: The hidden wealth of nations, Demos, https://demos.co.uk/research/social-capital-2025-the-hidden-wealth-of-nations/

HM Government (2024). Plan for Change: Milestones for mission-led government. https://www.gov.uk/government/publications/plan-for-change

Losada-Rojas, Lisa L., Indraneel Kumar, Annie Cruz-Porter, Yue Ke, Andrey Zhalnin, Benjamin St. Germain, Konstantina Gkritza & Lionel J. Beaulieu (2024). "Community capitals and economic resilience: insights from the Great Lakes Region post-Great Recession", Regional Studies, DOI: 10.1080/00343404.2024.2355987

McCann, P. (2020) 'Perceptions of regional inequality and the geography of discontent: insights from the UK', *Regional Studies*, 54(2), pp. 256–267. doi: 10.1080/00343404.2019.1619928.

McKeogh, N; Menukhin, O; Ortega-Argilés, R; Sarsfield, W; Silva Ruiz, A; Watson, R (2025). TPI UK ITL3 Scorecards, 2025 Edition. University of Manchester. Blog at: https://www.productivity.ac.uk/the-productivity-lab/the-2025-tpi-uk-itl3-productivity-scorecard-series/

Ministry of Housing, Communities and Local Government (2025). The English Indices of Deprivation 2025: statistical release. Published on 17/11/25. https://www.gov.uk/government/statistics/english-indices-of-deprivation-2025/english-indices-of-deprivation-2025-statistical-release#local-authority-district-analysis

OECD (2016), OECD Regional Outlook 2016: Productive Regions for Inclusive Societies, OECD Publishing, Paris, https://doi.org/10.1787/9789264260245-en.

OECD (2018), Productivity and Jobs in a Globalised World: (How) Can All Regions Benefit? OECD Regional Development Studies, OECD Publishing, Paris, https://doi.org/10.1787/9789264293137-en.

ONS (2021). Carbon dioxide emissions and woodland coverage where you live. 21/10/21. https://www.ons.gov.uk/economy/environmentalaccounts/articles/carbondioxideemissionsandwoodlandcoveragewhereyoulive/2021-10-21

ONS (2022). Experimental regional gross fixed capital formation (GFCF) estimates by asset type: 1997 to 2020. Released 10/5/22. https://www.ons.gov.uk/economy/regionalaccounts/grossdisposablehouseholdincome/articles/experimentalregionalgrossfixedcapitalformationgfcfestimatesbyassettype1997to2020/2022-05-10

ONS, (2024a). Regional gross domestic product: local authorities. https://www.ons.gov.uk/economy/grossdomesticproductgdp/datasets/regionalgrossdomesticproductlocalauthorities. Released 24/4/24,

ONS (2024b). Regional and subregional labour productivity, UK: 2022. https://www.ons.gov.uk/economy/economicoutputandproductivity/productivitymeasures/bulletins/regionalandsubregionallabourproductivityuk/2022, released 17/6/24.

ONS (2024c). Regional gross disposable household income, UK: 1997 to 2022, https://www.ons.gov.uk/economy/regionalaccounts/grossdisposablehouseholdincome/bulletins/regionalgrossdisposablehouseholdincomegdhi/1997to2022, released 4/9/24.

ONS (2025a). International trade in UK nations, regions and cities: 2022, 6/2/25, https://www.ons.gov.uk/businessindustryandtrade/internationaltrade/bulletins/internationaltradeinuknationsregionsandcities/2022

ONS (2025b). Clustering similar local authorities and statistical nearest neighbours in the UK, methodology, 14/2/25, https://www.ons.gov.uk/peoplepopulationandcommunity/wellbeing/methodologies/clusteringsimilarlocalauthoritiesandstatisticalnearestneighboursintheukmethodology

ONS (2025c). Regional gross value added (balanced) by industry: all ITL regions. https://www.ons.gov.uk/economy/grossvalueaddedgva/datasets/nominalandrealregionalgrossvalueaddedbalancedbyindustry, released 17/4/25.

ONS (2025d). Regional gross value added (balanced) by industry: LAs by ITL1 region. https://www.ons.gov.uk/economy/grossdomesticproductgdp/datasets/regionalgrossvalueaddedbalancedbyindustrylocalauthoritiesbyitl1region, for East of England, released 27/4/25.

Ortega-Argilés, R. and García Elena, F. (2025). The TPI Productivity Scorecards and Dashboards for Mayoral Combined Authorities – 2024 Edition. https://www.productivity.ac.uk/the-productivity-lab/the-tpi-productivity-scorecards-and-dashboards-for-mayoral-combined-authorities-2024-edition/

Silva-Ruiz, Alfonso; Sensier, Marianne; Ortega-Argiles, Raquel; Sarsfield, William (2026). TPI Local Authority Capitals Dashboard - Methods and Sources. University of Manchester. Report. https://doi.org/10.48420/31241401.v3.

The Productivity Institute (2024). Productivity Primer: Why productivity matters for the economy, business, and places. Available at: https://www.productivity.ac.uk/research/productivity-primer/

van Ark, B., J. Pendrill, K. Penney, J. Wilson, R. Ortega-Argilés (2025) Regional Productivity Agenda, The Productivity Institute. https://www.productivity.ac.uk/research/the-regional-productivity-agenda/

Watson, R. and Ortega-Argilés, R. (2025). The 2025 TPI UK ITL3 Productivity Scorecard Series. The Productivity Institute Blog: https://www.productivity.ac.uk/the-productivity-lab/the-2025-tpi-uk-itl3-productivity-scorecard-series/