Norfolk Tourism SWOT research

Research findings for Visit Norfolk
13th August 2014

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- Research objectives
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- Findings
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  - Visit behaviour and spend
  - Describing Norfolk
  - Perceptions and motivations to visit
  - Overcoming barriers
  - Comparative appeal
  - Information sourcing and communication
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- Summary
- Considerations
Background

- Visit Norfolk is the strategic voice of tourism and official website for the county, operating under contract from Norfolk County Council and the New Anglia LEP, with a website “visitnorfolk.co.uk” launched in June 2013.

- Despite the high visitor numbers, Visit Norfolk considers there to be an opportunity to increase the size of the tourism sector, developing the county as an all-year-round holiday and short break destination, whilst catering for the needs of all ages and interests.
  - There is a specific desire to increase visitor numbers, trips and spend in the county, and in particular, targeting those within a two-hour travel time.

- It is felt that there is now a requirement for insightful research to gain a clearer understanding about Norfolk’s visitor market, with a view to inform development of future strategy and to maximise return on investment from marketing spend.
Research objectives

The overall objectives for this research programme were...:

- to gain a clearer understanding about Norfolk’s visitor market, with a view to helping develop future strategy and achieve a sizeable return on marketing investment
- to establish Norfolk tourism’s strengths, weaknesses, opportunities and threats, provide a segmentation of the visitor market and benchmark the county against top of mind tourism counties and inform future strategy

Specific research objectives included:

- understanding the visitor profile
- understanding visitor behaviour
- understanding visitor perceptions and motivations
- understanding barriers to visiting
- benchmarking against other UK destinations
- understanding information sourcing and communication
Methodology

How?  ➔ Predominantly quantitative online self-completion survey distributed via a national panel

How many?  ➔ A total of 1,601 respondents, providing robust findings overall, with some robustness across sub-groups

Who?  ➔ Quotas were implemented to provide a mix of respondent by ages, social grades, home locations across the UK and perceived drive time to Norfolk

When?  ➔ Fieldwork was conducted during June 2014

Where?  ➔ UK-wide
Respondent profiles
(Used for quota controls and cross-analysis)
Respondent profile: demographics

Through the use of quotas:

- A good range of ages was achieved
- Respondents were a mix of men and women
Respondent profile: family structure

- Respondents were generally in a relationship
- Around a third take holidays with children
- No quotas were applied to these profiling questions

### Marital status

<table>
<thead>
<tr>
<th>Marital Status</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married/civil partnership/living with partner</td>
<td>61%</td>
</tr>
<tr>
<td>Single</td>
<td>26%</td>
</tr>
<tr>
<td>Divorced/separated/widower</td>
<td>12%</td>
</tr>
<tr>
<td>Refused</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Holidaying with children?

<table>
<thead>
<tr>
<th>Age Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children aged under 5 years</td>
<td>14%</td>
</tr>
<tr>
<td>Children aged between 5-10 years</td>
<td>14%</td>
</tr>
<tr>
<td>Children aged between 11-16 years</td>
<td>13%</td>
</tr>
<tr>
<td>Children aged between 17-18 years</td>
<td>5%</td>
</tr>
<tr>
<td>Adults only</td>
<td>65%</td>
</tr>
</tbody>
</table>

Base: 1,601 - prompted
Respondent profile: income and social grade

- A quota applied to social grade to ensure a good mix
- A range of income levels naturally followed

**Social grade**

<table>
<thead>
<tr>
<th>Social grade</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB</td>
<td>28</td>
</tr>
<tr>
<td>C1</td>
<td>26</td>
</tr>
<tr>
<td>C2</td>
<td>21</td>
</tr>
<tr>
<td>DE</td>
<td>25</td>
</tr>
</tbody>
</table>

**Gross annual HH income**

- Under £15,000: 22%
- £15,500 - £24,999: 21%
- £25,000 - £49,999: 30%
- £50,000 - £74,999: 9%
- £75,000+: 4%
- Don't know: 3%
- Refused: 10%

**Monthly disposable household income**

<table>
<thead>
<tr>
<th>Income Range</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refused</td>
<td>12</td>
</tr>
<tr>
<td>Don't know</td>
<td>11</td>
</tr>
<tr>
<td>Under £100</td>
<td>19</td>
</tr>
<tr>
<td>£100 - £249</td>
<td>20</td>
</tr>
<tr>
<td>£250 - £499</td>
<td>17</td>
</tr>
<tr>
<td>£500 - £749</td>
<td>9</td>
</tr>
<tr>
<td>£750 - £999</td>
<td>4</td>
</tr>
<tr>
<td>£1,000 - £1,499</td>
<td>4</td>
</tr>
<tr>
<td>£1,500 - £1,999</td>
<td>1</td>
</tr>
<tr>
<td>£2,000+</td>
<td>3</td>
</tr>
</tbody>
</table>

Base: 1,601 - prompted
Quotas saw a range of perceived drive times represented, and ensured that around half the respondents were from the East of England.

**Home location**

- East of England: 50
- West Midlands: 5
- East Midlands: 5
- Wales: 5
- South East England: 5
- Greater London: 5
- South West: 5
- Scotland: 5
- North West: 5
- North East: 5
- Yorkshire/Humberside: 5

**Perceived drive time (in hours)**

- Within two hours: 42%
- Two to three hours: 29%
- Three hours or more: 29%

Base: 1,601 - prompted
Respondent profile: recency of visiting Norfolk

A range of recency of last visit to Norfolk was achieved through quotas, including those who have never visited.

<table>
<thead>
<tr>
<th>When last visited Norfolk for leisure</th>
<th>Base: 1,601 - prompted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within the past six months</td>
<td>15%</td>
</tr>
<tr>
<td>Six months to a year ago</td>
<td>8%</td>
</tr>
<tr>
<td>A year to two years ago</td>
<td>10%</td>
</tr>
<tr>
<td>Two to five years ago</td>
<td>22%</td>
</tr>
<tr>
<td>Five to ten years ago</td>
<td>18%</td>
</tr>
<tr>
<td>Longer than ten years ago</td>
<td>10%</td>
</tr>
<tr>
<td>Never visited</td>
<td>14%</td>
</tr>
<tr>
<td>Can’t remember</td>
<td>4%</td>
</tr>
</tbody>
</table>

- Very recent visitor: 33%
- Recent visitor: 22%
- Non-recent visitor: 18%
- Previous visitor: 10%
- Non-visitor: 18%
Findings:  
Awareness of Norfolk
Do people know where Norfolk is?

- Overall, only around two-thirds actually know where Norfolk is when presented with a blank county map of the UK.

- Accuracy was perhaps surprisingly low even amongst close neighbours to the county - only just over two-thirds (68%) within two hours know, although those living in the North are the least likely to know (49%).

- Around two-fifths (42%) of non-visitors knew, although perhaps surprisingly only 67% of visitors did, with little difference by recency of visit - only 69% of very recent visitors identified Norfolk correctly!

- Other groups more likely to know than their counterparts:
  - Aged 55+ (72%)
  - Holidaying with no children (66%)
  - ABC1 (67%)

Base: 1,601 - unprompted, single response

Q: Please click on the county of Norfolk on this map

Identifying Norfolk on a blank UK county map

Correct: 63%
(68% within 2 hours)

Don’t know: 10%

Incorrect: 28%
Awareness of areas of Norfolk

- Urban areas are typically the best known areas (Norwich and Great Yarmouth, and to a lesser extent King’s Lynn)
- The Broads are also well known top-of-mind, while other landscapes (the Fens and Thetford Forest) are recalled when prompted
- The Brecks, South Norfolk and the Waveney Valley are much less known

**Unprompted awareness**

<table>
<thead>
<tr>
<th>Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norwich</td>
<td>42%</td>
</tr>
<tr>
<td>The Broads</td>
<td>32%</td>
</tr>
<tr>
<td>North Norfolk</td>
<td>24%</td>
</tr>
<tr>
<td>Thetford Forest</td>
<td>4%</td>
</tr>
<tr>
<td>The Fens</td>
<td>4%</td>
</tr>
<tr>
<td>King’s Lynn and West Norfolk</td>
<td>22%</td>
</tr>
<tr>
<td>Somewhere outside Norfolk</td>
<td>8%</td>
</tr>
</tbody>
</table>

**Prompted awareness**

<table>
<thead>
<tr>
<th>Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norwich</td>
<td>61%</td>
</tr>
<tr>
<td>Great Yarmouth</td>
<td>83%</td>
</tr>
<tr>
<td>South Norfolk</td>
<td>43%</td>
</tr>
<tr>
<td>The Brecks</td>
<td>45%</td>
</tr>
<tr>
<td>Thetford Forest</td>
<td>23%</td>
</tr>
<tr>
<td>The Broads</td>
<td>33%</td>
</tr>
<tr>
<td>North Norfolk</td>
<td>10%</td>
</tr>
<tr>
<td>The Fens</td>
<td>70%</td>
</tr>
<tr>
<td>King’s Lynn and West Norfolk</td>
<td>81%</td>
</tr>
<tr>
<td>Somewhere outside Norfolk</td>
<td>13%</td>
</tr>
</tbody>
</table>
Typical visitors and visiting habits
Who has visited Norfolk?
(Natural fallout demographics - before quotas were applied)

**Home location (ever visited)**
- East Midlands (N=54): 87% visited, 13% not visited
- East of England (N=66): 83% visited, 17% not visited
- South East England (N=99): 70% visited, 30% not visited
- Greater London (N=24): 63% visited, 38% not visited
- Yorkshire/Humberside (N=57): 60% visited, 40% not visited
- South West (N=63): 57% visited, 43% not visited
- North West (N=69): 55% visited, 45% not visited
- West Midlands (N=59): 54% visited, 46% not visited
- North East (N=32): 47% visited, 53% not visited
- Scotland (N=47): 43% visited, 57% not visited
- Wales (N=30): 37% visited, 63% not visited

**Gender (ever visited)**
- 35% male, 41% female

**Social grade (ever visited)**
- AB: 30% visited, 70% not visited
- C1: 35% visited, 65% not visited
- C2: 38% visited, 62% not visited
- DE: 51% visited, 49% not visited

**Age (visited in past five years)**
- 18-34 (N=98): 65% visited, 35% not visited
- 35-54 (N=180): 73% visited, 27% not visited
- 55+ (N=322): 68% visited, 32% not visited

Base: 600 (the first responses before quotas were implemented) - prompted, single response
Who has visited Norfolk?
*(Hobbies and interests)*

- The most common hobbies of Norfolk visitors are those involving being ‘outdoors’ and ‘hands-on’, with history and high culture also important interests.

- Many of the aggregated categories show notable differences between the visitor and non-visitor profile (highlighted in red and green in the table below).

### Specific interests of the overall sample

<table>
<thead>
<tr>
<th>Interest</th>
<th>Visitors</th>
<th>Non-visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>History/heritage</td>
<td>27</td>
<td>20</td>
</tr>
<tr>
<td>Nature/wildlife watching</td>
<td>27</td>
<td>22</td>
</tr>
<tr>
<td>Walking/hiking</td>
<td>23</td>
<td>17</td>
</tr>
<tr>
<td>Cinema/film</td>
<td>23</td>
<td>17</td>
</tr>
<tr>
<td>Gardening</td>
<td>17</td>
<td>10</td>
</tr>
<tr>
<td>Sports</td>
<td>17</td>
<td>13</td>
</tr>
<tr>
<td>Technology and gadgets</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>Fine dining</td>
<td>13</td>
<td>5</td>
</tr>
<tr>
<td>Literature</td>
<td>13</td>
<td>6</td>
</tr>
<tr>
<td>Arts and crafts</td>
<td>12</td>
<td>6</td>
</tr>
<tr>
<td>Fashion/appearance</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>Current affairs/politics</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Gaming</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Theatre/ opera/ballet</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Fine art and architecture</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Celebrity gossip</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>None of these</td>
<td>5</td>
<td>5</td>
</tr>
</tbody>
</table>

### Categorised interests of visitors and non-visitors

<table>
<thead>
<tr>
<th>Interest</th>
<th>Visitors</th>
<th>Non-visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>The outdoors</td>
<td>43%</td>
<td>35%</td>
</tr>
<tr>
<td>High culture</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Popular culture</td>
<td>33%</td>
<td>40%</td>
</tr>
<tr>
<td>Technology</td>
<td>20%</td>
<td>33%</td>
</tr>
<tr>
<td>Hands-on</td>
<td>33%</td>
<td>24%</td>
</tr>
<tr>
<td>Sports</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Politics</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>History</td>
<td>39%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Base: 1,601 (all respondents) - prompted, multiple response

Q: Which THREE of the following are you most interested in?
The number of visits to Norfolk typically reflects the recency of last visiting the county and drive time (30% within 2 hours have visited more than 10 times).

Nonetheless, over half (61%) of those who have not visited in the past ten years have visited more than once.

<table>
<thead>
<tr>
<th>Number of visits</th>
<th>Overall - ever visited (N=1,315)</th>
<th>Very recent visitor - within past 2 years (N=524)</th>
<th>Recent visitor 2-5 years ago (N=351)</th>
<th>Non-recent visitor 5-10 years ago (N=283)</th>
<th>Previous visitor - over 10 years ago (N=157)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only once</td>
<td>21</td>
<td>15</td>
<td>20</td>
<td>26</td>
<td>39</td>
</tr>
<tr>
<td>2 - 3 times</td>
<td>31</td>
<td>26</td>
<td>34</td>
<td>39</td>
<td>31</td>
</tr>
<tr>
<td>4 - 5 times</td>
<td>18</td>
<td>17</td>
<td>23</td>
<td>16</td>
<td>18</td>
</tr>
<tr>
<td>6 - 10 times</td>
<td>10</td>
<td>12</td>
<td>12</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>More than 10 times</td>
<td>19</td>
<td>31</td>
<td>12</td>
<td>12</td>
<td>8</td>
</tr>
</tbody>
</table>

Base: 1,315 (those who have ever visited Norfolk) - prompted, single response

Q: How many times have you visited Norfolk for leisure in the past?
Also as might be expected, very recent visitors are also the most frequent visitors, while non-recent/previous visitors are unlikely to visit more often than once every five years.

Drive time is also a major factor - nearly half (46%) of those who live within two hours visit at least once a year compared to just 18% of those living 3+ hours away.

18-34s from the East of England are also particularly frequent visitors (28% visiting at least once a year).

Frequency of visiting Norfolk

- Overall - ever visited (N=1,035)
- Very recent visitor - within past 2 years (N=448)
- Recent visitor 2-5 years ago (N=282)
- Non-recent visitor 5-10 years ago (N=210)
- Previous visitor - over 10 years ago (N=95)

Base: 1,035 (those who have ever visited Norfolk more than once) - prompted, single response

Q: On average, which of these best describes how frequently you visit Norfolk for leisure?
Visiting areas of Norfolk

Visiting in general is loosely correlated to home location - those from the North typically visiting two areas, while those from the rest of the country having visited three.

Urban areas are far more likely to be visited than more rural areas (especially by those aged 18-34), although the Broads are also frequently visited (regardless of home location, although significantly more visited by those aged 35+).

Great Yarmouth specifically attracts C2DE (76%) and those with a limited income of less than £250 a month (70%).
In general, attitudes towards returning to specific areas is quite similar regardless of the recency of visit and drive time.

Nonetheless, those having visited in the past two years appear to be less open to the idea of trying new areas.

Typical behaviour regarding the areas visited:

- **Overall - ever visited (N=1,315)**
  - Always return to same areas: 21%
  - Usually return to same areas: 41%
  - Usually try new areas: 26%
  - Always visit different areas: 12%

- **Very recent visitor within past 2 years (N=524)**
  - Always return to same areas: 24%
  - Usually return to same areas: 48%
  - Usually try new areas: 20%
  - Always visit different areas: 7%

- **Recent visitor 2-5 years ago (N=351)**
  - Always return to same areas: 21%
  - Usually return to same areas: 39%
  - Usually try new areas: 30%
  - Always visit different areas: 10%

- **Non-recent visitor 5-10 years ago (N=283)**
  - Always return to same areas: 18%
  - Usually return to same areas: 35%
  - Usually try new areas: 31%
  - Always visit different areas: 17%

- **Previous visitor more than 10 years ago (N=157)**
  - Always return to same areas: 16%
  - Usually return to same areas: 34%
  - Usually try new areas: 24%
  - Always visit different areas: 26%

Base: 1,315 (those who have ever visited Norfolk) - prompted, single response

Q: Which of the following best describes your behaviour regarding the areas you typically visit in Norfolk?
On your last visit to Norfolk...
(visit logistics)
A week’s holiday is the most common length of visit
Most frequently taken by those aged 35+ (24%) and those travelling more than three hours (37%)
However staying longer than a week is relatively rare
Daytrips are also popular
Particularly amongst those within 2 hours drive (48%)
Mid-week trips are taken by lower income (20%), 55+ (22%) with no children in tow (19%), and weekend trips are most likely to be taken by those aged 18-34 (24%)

Base: 1,315 (those who have ever visited Norfolk) - prompted, single response
Q: Which of these best describe how long you stayed for?
Length of visit
(On your last visit to Norfolk...)

- June is most visited overall for both day and stay trips
- Those who are visiting in October to May are typically coming for shorter visits, whilst there is a notable uplift in ‘holidays’ (one week +) between June and September
- January, February, March and November are particularly high for day-trippers and therefore poor for stay-trippers
- Although the base is small, visitors in December are much more likely to be stay-trippers than day-trippers

% of visitors that month who are day trippers

<table>
<thead>
<tr>
<th>Month</th>
<th>% Day Trippers</th>
</tr>
</thead>
<tbody>
<tr>
<td>January (N=27)</td>
<td>48%</td>
</tr>
<tr>
<td>February (N=24)</td>
<td>54%</td>
</tr>
<tr>
<td>March (N=50)</td>
<td>50%</td>
</tr>
<tr>
<td>April (N=107)</td>
<td>42%</td>
</tr>
<tr>
<td>May (N=189)</td>
<td>34%</td>
</tr>
<tr>
<td>June (N=268)</td>
<td>32%</td>
</tr>
<tr>
<td>July (N=212)</td>
<td>33%</td>
</tr>
<tr>
<td>August (N=241)</td>
<td>30%</td>
</tr>
<tr>
<td>September (N=138)</td>
<td>30%</td>
</tr>
<tr>
<td>October (N=64)</td>
<td>29%</td>
</tr>
<tr>
<td>November (N=18)</td>
<td>50%</td>
</tr>
<tr>
<td>December (N=20)</td>
<td>25%</td>
</tr>
</tbody>
</table>

Base: 1,315 (those who have ever visited Norfolk) - prompted, single response
Q: Which of these best describe how long you stayed for?
Norfolk’s key holiday season appears to be April to September

- June to August is the key peak, particularly amongst those taking children (i.e. school summer holidays)

A third (30%) of those within a two hour drive visit Norfolk in the Spring, whilst those extending the season to September are most likely to be aged 55+ (16%), DE (14%), holidaying without children (12%) and couples (12%)

Those aged 18-34 are marginally more likely than most to take a winter holiday in Norfolk than older age groups (3% in December and 5% in January)

Base: 1,315 (those who have ever visited Norfolk) - prompted, multiple response (sequential validation)

Q: What time of year was it?
**Time of year - by location**

Visitors in November-April are most likely to be visiting Norwich, whilst May-October visitors are most likely to be visiting Great Yarmouth.

Visitors in March appear more likely to be visiting a wider variety of areas.

<table>
<thead>
<tr>
<th>Location</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N=29</td>
<td>N=26</td>
<td>N=23</td>
<td>N=61</td>
<td>N=107</td>
<td>N=189</td>
<td>N=262</td>
<td>N=211</td>
<td>N=239</td>
<td>N=137</td>
<td>N=64</td>
<td>N=18</td>
</tr>
<tr>
<td>Great Yarmouth</td>
<td>66</td>
<td>55</td>
<td>35</td>
<td>43</td>
<td>52</td>
<td>55</td>
<td>71</td>
<td>69</td>
<td>70</td>
<td>78</td>
<td>69</td>
<td>67</td>
</tr>
<tr>
<td>Norwich</td>
<td>56</td>
<td>65</td>
<td>62</td>
<td>57</td>
<td>66</td>
<td>59</td>
<td>61</td>
<td>59</td>
<td>48</td>
<td>55</td>
<td>56</td>
<td>61</td>
</tr>
<tr>
<td>The Broads</td>
<td>43</td>
<td>35</td>
<td>38</td>
<td>26</td>
<td>41</td>
<td>43</td>
<td>52</td>
<td>46</td>
<td>46</td>
<td>44</td>
<td>49</td>
<td>34</td>
</tr>
<tr>
<td>Kings Lynn &amp; West Norfolk</td>
<td>32</td>
<td>25</td>
<td>19</td>
<td>17</td>
<td>41</td>
<td>30</td>
<td>39</td>
<td>35</td>
<td>29</td>
<td>31</td>
<td>41</td>
<td>30</td>
</tr>
<tr>
<td>Thetford Forest</td>
<td>26</td>
<td>35</td>
<td>19</td>
<td>30</td>
<td>44</td>
<td>26</td>
<td>28</td>
<td>31</td>
<td>26</td>
<td>23</td>
<td>23</td>
<td>20</td>
</tr>
<tr>
<td>North Norfolk</td>
<td>24</td>
<td>20</td>
<td>12</td>
<td>30</td>
<td>33</td>
<td>26</td>
<td>28</td>
<td>25</td>
<td>28</td>
<td>19</td>
<td>28</td>
<td>19</td>
</tr>
<tr>
<td>The Fens</td>
<td>15</td>
<td>20</td>
<td>15</td>
<td>13</td>
<td>26</td>
<td>18</td>
<td>15</td>
<td>15</td>
<td>14</td>
<td>14</td>
<td>18</td>
<td>13</td>
</tr>
<tr>
<td>South Norfolk</td>
<td>10</td>
<td>10</td>
<td>12</td>
<td>17</td>
<td>25</td>
<td>15</td>
<td>10</td>
<td>10</td>
<td>12</td>
<td>8</td>
<td>12</td>
<td>8</td>
</tr>
<tr>
<td>Waveney Valley</td>
<td>6</td>
<td>5</td>
<td>6</td>
<td>9</td>
<td>16</td>
<td>8</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>The Brecks</td>
<td>3</td>
<td>5</td>
<td>8</td>
<td>13</td>
<td>10</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

% of that month’s visitors:
- 70-79%: 30-39%
- 60-69%: 20-29%
- 50-59%: 10-19%
- 40-49%: 1-9%
Accommodation stayed in
(On your last visit to Norfolk...)

- Holiday parks are the most utilised accommodation type, although 20% stayed in a hotel (when including both independents and chains)
- Overall, a third (32%) had stayed at that accommodation/site on a previous occasion (proportions of green indicate this per accommodation type where relevant)
  - Most frequently holiday parks (44%), boats (43%) and chain hotels (38%)
  - Least frequently self-catering accommodation (15%) and independent hotels (19%)

<table>
<thead>
<tr>
<th>Accommodation type</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday park/chalet/static caravan</td>
<td>23</td>
</tr>
<tr>
<td>B&amp;B/guesthouse</td>
<td>13</td>
</tr>
<tr>
<td>Self-catering cottage/flats/apartments</td>
<td>12</td>
</tr>
<tr>
<td>Chain hotel</td>
<td>11</td>
</tr>
<tr>
<td>Stayed with friends/relatives</td>
<td>10</td>
</tr>
<tr>
<td>Camping/touring caravan</td>
<td>10</td>
</tr>
<tr>
<td>Independent hotel</td>
<td>9</td>
</tr>
<tr>
<td>Boat</td>
<td>6</td>
</tr>
<tr>
<td>Own/friend’s/family’s holiday home</td>
<td>4</td>
</tr>
<tr>
<td>Inns/pubs</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
</tr>
<tr>
<td>Hostel</td>
<td></td>
</tr>
</tbody>
</table>

Base: 873 (those who have ever visited Norfolk and stayed overnight on their last visit) - prompted, single response

Q: What type of accommodation did you stay in?
Planning accommodation: information sourcing

(On your last visit to Norfolk...)

- **Online sources are the most frequently used sources of information**
  - Most frequently used by ABs (67%) and 18-34s (67%)
  - 22% of those who use accommodation websites for information then book their accommodation by phone

- **Personal contacts (word-of-mouth and memories) are also important**
  - Particularly so amongst relatively local East of England residents (31%)

- **Print sources are less used**
  - Although still used by DEs (26%) or those with affluent (£50-75,000) HH incomes (31%)

### Where found out about accommodation

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>General internet search</td>
<td>31%</td>
</tr>
<tr>
<td>Word-of-mouth</td>
<td>17%</td>
</tr>
<tr>
<td>Accommodation websites</td>
<td>17%</td>
</tr>
<tr>
<td>Personal memories</td>
<td>13%</td>
</tr>
<tr>
<td>Destination brochures</td>
<td>13%</td>
</tr>
<tr>
<td>Tourist information websites</td>
<td>10%</td>
</tr>
<tr>
<td>Review websites</td>
<td>9%</td>
</tr>
<tr>
<td>Newspapers/magazines</td>
<td>6%</td>
</tr>
<tr>
<td>Travel agent’s website</td>
<td>4%</td>
</tr>
<tr>
<td>Other: booked for me</td>
<td>2%</td>
</tr>
<tr>
<td>Travel agent (in-store)</td>
<td>2%</td>
</tr>
<tr>
<td>Newspaper reviews/articles</td>
<td>2%</td>
</tr>
<tr>
<td>Holiday blogs</td>
<td>2%</td>
</tr>
<tr>
<td>Other: holiday club</td>
<td>1%</td>
</tr>
<tr>
<td>Holiday/travel events or shows</td>
<td>1%</td>
</tr>
<tr>
<td>Holiday TV programmes/channels</td>
<td>1%</td>
</tr>
<tr>
<td>Holiday apps (phones/tablets)</td>
<td>1%</td>
</tr>
<tr>
<td>Social media</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>None of these</td>
<td>7%</td>
</tr>
</tbody>
</table>

Base: 755 (those who have ever visited Norfolk and stayed overnight in accommodation available to the public on their last visit) - prompted, multiple response  

Q: Where did you find information about your accommodation?
Planning accommodation: how far ahead booked
(On your last visit to Norfolk...)

⇒ The majority book some time before their holiday - typically at least a month

⇒ Nonetheless, nearly a fifth book with less than a week to go - such last minute bookers are most likely to be:
⇒ Living within a two hour drive (27%), aged 18-34 (24%) and singles (23%)

How far ahead accommodation was booked

- On the day: 4%
- A few days before: 6%
- A week before: 9%
- A fortnight before: 7%
- A month before: 25%
- Several months before: 35%
- Six months before: 12%
- A year before: 2%
- Longer than a year before: 1%

Base: 873 (those who have ever visited Norfolk and stayed overnight on their last visit) - prompted, single response

Q: How far ahead did you plan your accommodation?
Planning accommodation: how booked
(On your last visit to Norfolk...)

- With nearly half saying online, this is the most popular way to book accommodation
  - Particularly so amongst those aged 18-34 (66%), ABs (59%) and those holidaying with children (59%)

- Nonetheless, booking via the telephone is also popular
  - This is the most preferred option for the over 55s (52%), DEs (46%) and those not taking children (46%)

- A small, but notable minority, said they booked by post (typically via newspaper vouchers)

Base: 707 (those who have ever visited Norfolk, stayed overnight in accommodation available to the public and could remember how it was booked on their last visit) - prompted, single response
Q: How did you book your accommodation?

Internet: 49%
Phone: 40%
Face-to-face: 10%
Post: 1%
Visit behaviour and spend
As would be expected, overall spend on accommodation increases with length of stay.

The mean average spend is £281, although it ranged from £0 (presumably staying with relatives/own holiday home) to over £1,500.

Overall average = £281

<table>
<thead>
<tr>
<th>Type of Stay</th>
<th>Spend</th>
<th>Mid-point of price brackets used to derive averages (under £100 taken as £0, and £1,500+ taken as £1,500)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short weekend (N=175)</td>
<td>£164</td>
<td></td>
</tr>
<tr>
<td>Long weekend (N=157)</td>
<td>£235</td>
<td></td>
</tr>
<tr>
<td>Mid-week break (N=110)</td>
<td>£235</td>
<td></td>
</tr>
<tr>
<td>One week holiday (N=267)</td>
<td>£382</td>
<td></td>
</tr>
<tr>
<td>Two week holiday (N=35)</td>
<td>£619</td>
<td></td>
</tr>
</tbody>
</table>

Base: 755 (those who have ever visited Norfolk and stayed overnight in accommodation available to the public on their last visit) - prompted, single response. Q: Approximately how much was your spend on accommodation (including for your family, if applicable)
As with accommodation, staying longer increases the amount of spending money.

The mean average spend is just over £200, although again some spend nothing, while other spend over £1,500.

**Spend: spending money**

(On your last visit to Norfolk...)

- **Mid week day trip (N=216)**: £106
- **Weekend day trip (N=226)**: £133
- **Short weekend (N=223)**: £154
- **Long weekend (N=188)**: £238
- **Mid-week break (N=124)**: £194
- **One week holiday (N=282)**: £326
- **Two week holiday (N=41)**: £583

**Overall average = £203**

<table>
<thead>
<tr>
<th>Overall</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean</td>
<td>£203</td>
</tr>
<tr>
<td>Mode</td>
<td>Under £100</td>
</tr>
<tr>
<td>Range</td>
<td>£0 - £1,500+</td>
</tr>
</tbody>
</table>

Base: 1,315 (those who have ever visited Norfolk) - prompted, single response

Q: Approximately how much was your spend on...your spending money for the trip e.g. on food, drink, entertainment, transport (including for your family, if applicable)
Visit Norfolk
The official visitor website for Norfolk

Spend per day
(On your last visit to Norfolk...)

- Although overall spend increases with length of stay, spend per day actually decreases, whereby those staying for a short weekend potentially offer the best profit margins.

- Visitors typically split their spend per day evenly between accommodation and spending money.

![Graph](image)
Visiting attractions
(Ever visited in Norfolk)

- The natural environment appears to be the most visited attraction in Norfolk with the coastal beaches and countryside appearing at the top of the list.

- Shopping also appears to be a major draw, particularly amongst the more local East of England residents (48%) and women (52%).

- Although summer is the peak season for most attractions (particularly June), museums and art galleries/craft centres are also particularly visited in spring.

Visiting attractions
(Ever visited in Norfolk)

- The natural environment appears to be the most visited attraction in Norfolk with the coastal beaches and countryside appearing at the top of the list.

- Shopping also appears to be a major draw, particularly amongst the more local East of England residents (48%) and women (52%).

- Although summer is the peak season for most attractions (particularly June), museums and art galleries/craft centres are also particularly visited in spring.

Base: 1,315 (those who have ever visited Norfolk) - prompted, multiple response

Q: On any of your visits to Norfolk, which of the following have you gone to?
Delving a little deeper... attraction-specific findings

Looking in more detail at the profiles and behaviour patterns of those visiting Norfolk’s attractions some interesting findings emerge:

Distinct overlap of interests in some instances, with two groups emerging:

- **Group 1 ‘Discerning’:** primary cluster of visitors
  - Maturer - typically (but not exclusively) aged 55+
  - Fewer DE social grades
  - ‘Outdoorsy’
  - Interested in history
  - Typically adult only visitors (or with older children, if present)
  - More likely to use self-catering accommodation (but not in a holiday park)

- **Group 2 ‘Popular Culture’:** secondary cluster of visitors
  - Younger - typically (but not exclusively) aged 18-24 or parents with younger children
  - Not interested in politics
  - Interested in popular culture
  - Like visiting amusement arcades, cinemas, and events/festivals
Taking part in activities
(Ever visited in Norfolk)

Reflecting the key themes of why Norfolk is chosen over other UK counties, activities in the ‘great outdoors’ like walking and bird watching are some of the most popular activities in Norfolk.

Water activities (boating, open water swimming) are also popular.

Those with a two hour drive are significantly more likely to take part in outdoor activities (25%), outdoor adventures (10%) and be pampered (5%) than those from further afield.

Base: 1,315 (those who have ever visited Norfolk) - prompted, multiple response  
Q: And on any of your visits to Norfolk, which of the following activities have you done or been to?
Delving a little deeper... activities-specific findings

Looking in more detail at the profiles and behaviour patterns of those taking part in activities in Norfolk some interesting findings again emerge.

Distinct overlap of interests in some instances, with three groups emerging:

- **Group 1: Outdoorsy and less ‘DE’** - typically enjoy walking, bird-watching and/or cycling.
- **Group 2: Younger families** - typically enjoy indoor and outdoor sports, adventure activities and/or paintballing.
- **Group 3: Laid-back rural leisure** - typically enjoy fishing, golf or horse-riding.
Describing Norfolk
Describing Norfolk in three words
(Key responses)

Q: If you could use just three individual words to describe Norfolk, what would they be?

Base: all respondents - unprompted, open response
Norfolk associations

- Overall associations of Norfolk were very neutral in strength - reflecting a polarity of opinion across all these aspects, and perhaps the diversity of Norfolk itself.
- No notable differences by visitor profile and demographics.

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Weighted Score</th>
<th>&lt;Strongly&gt;</th>
<th>&lt;Mildly&gt;</th>
<th>&lt;Neutral&gt;</th>
<th>Mildly&gt;</th>
<th>Strongly&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy to get around</td>
<td>37</td>
<td>12</td>
<td>21</td>
<td>&lt;3</td>
<td>21</td>
<td>9</td>
</tr>
<tr>
<td>Offers unique experiences</td>
<td>48</td>
<td>8</td>
<td>20</td>
<td>&lt;3</td>
<td>18</td>
<td>6</td>
</tr>
<tr>
<td>Interesting</td>
<td>29</td>
<td>16</td>
<td>20</td>
<td>&lt;2</td>
<td>22</td>
<td>13</td>
</tr>
<tr>
<td>Traditional</td>
<td>36</td>
<td>11</td>
<td>22</td>
<td>&lt;2</td>
<td>22</td>
<td>9</td>
</tr>
<tr>
<td>Sparsely populated</td>
<td>45</td>
<td>7</td>
<td>19</td>
<td>2&gt;</td>
<td>45</td>
<td>22</td>
</tr>
<tr>
<td>Lots to do</td>
<td>36</td>
<td>13</td>
<td>19</td>
<td>&lt;1</td>
<td>21</td>
<td>11</td>
</tr>
<tr>
<td>Welcoming</td>
<td>27</td>
<td>16</td>
<td>21</td>
<td>&lt;1</td>
<td>21</td>
<td>15</td>
</tr>
<tr>
<td>Easy to get to</td>
<td>33</td>
<td>14</td>
<td>21</td>
<td>&lt;1</td>
<td>19</td>
<td>14</td>
</tr>
<tr>
<td>Great local produce</td>
<td>33</td>
<td>15</td>
<td>17</td>
<td>1&gt;</td>
<td>21</td>
<td>14</td>
</tr>
<tr>
<td>Fashionable</td>
<td>54</td>
<td>41</td>
<td>18</td>
<td>1&gt;</td>
<td>19</td>
<td>14</td>
</tr>
<tr>
<td>Offers good value for money</td>
<td>49</td>
<td>8</td>
<td>17</td>
<td>1&gt;</td>
<td>19</td>
<td>8</td>
</tr>
<tr>
<td>Sophisticated</td>
<td>56</td>
<td>41</td>
<td>17</td>
<td>&lt;0&gt;</td>
<td>19</td>
<td>13</td>
</tr>
<tr>
<td>Beautiful</td>
<td>26</td>
<td>16</td>
<td>21</td>
<td>&lt;0&gt;</td>
<td>21</td>
<td>16</td>
</tr>
</tbody>
</table>

Base: all respondents - prompted, single response per pair.

Q: Considering the following pairs of words or phrases, please indicate which you think most applies to the Norfolk, and how strong this association is.
Perceptions and motivations to visit
Appeal of Norfolk as a leisure destination

- Visitors typically find Norfolk appealing, but there is a notable drop amongst non-visitors.
- There is also some correlation by proximity, with (71%) of those within 2 hours finding the county appealing.
- The other groups Norfolk most appeals to are those aged 55+ (73%) and those aged 35+ travelling with children (75%).

<table>
<thead>
<tr>
<th>Audience</th>
<th>Overall (N=1,601)</th>
<th>Very recent visitor (N=524)</th>
<th>Recent visitor (N=351)</th>
<th>Non-recent visitor (N=283)</th>
<th>Previous visitor (N=157)</th>
<th>Non-visitor (N=286)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mean average</td>
<td>3.8</td>
<td>4.1</td>
<td>3.9</td>
<td>3.8</td>
<td>3.7</td>
<td>3.1</td>
</tr>
<tr>
<td>% saying ‘quite’ or ‘very’ appealing</td>
<td>66%</td>
<td>82%</td>
<td>73%</td>
<td>69%</td>
<td>61%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Base: all respondents - prompted, single response

Q: How appealing do you find Norfolk as a leisure destination?
The best thing about Norfolk is...
(key themes)

...the lovely beaches and coastline (16%)
...the beautiful countryside (10%)
...the Broads (8%)
...the scenery (5%)
...the friendly people (4%)
...it’s quiet, peaceful and relaxing (4%)
...the towns/cities - Norwich and Great Yarmouth (3%)
...the variety of things to see and do (2%)
...the wildlife and bird watching (2%)
...the towns and villages (2%)
...the food, pubs and beer (2%)

Base: all respondents - unprompted, open response
Q: Please complete the following phrase: the best thing about Norfolk is...
The worst thing about Norfolk is...

(key themes)

...the poor road network to and within (7%)
...the wet, windy, cold weather (5%)
...it’s just too far away (3%)
...the flat landscape (2%)
...long traffic delays getting there (2%)
...lack of public transport (2%)
...it’s boring (2%)
...it’s expensive (2%)
Convenience of travelling to Norfolk

- As might be expected, proximity to Norfolk is the key factor behind perceived convenience of travelling to the county.

- Thereby, those in Scotland, Wales and the South West would find it the least convenient, whilst those living in the East Midlands and the South East find it the most.
  - However, even these more local scores are not overly positive.
  - In fact, only 52% of those within a two hour drive find travelling ‘convenient’, with just 12% saying ‘very convenient’.

Findings show the % who find travelling to Norfolk quite or very convenient and the mean average score of convenience.

Base: all respondents - prompted, single response

Q: And how convenient do you find / would you expect to find travelling to Norfolk from your home?
Stand out towns/villages in Norfolk (key locations)

- A wide variety of villages were named a few times

- However, the key locations were generally larger towns - Norwich and Great Yarmouth particularly stood out

Base: 1,315 (those ever visited Norfolk) - unprompted, open response

Q: Is there a specific town or village in Norfolk that stood out as being particularly appealing to you on your visit?
Respondents were provided with the following descriptors of each area

(No images were provided in the survey)

<table>
<thead>
<tr>
<th>Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norwich</td>
<td>Historic city with a flourishing arts, music and cultural scene, superb independent as well as High Street shopping, lively restaurants, bars and nightlife</td>
</tr>
<tr>
<td>Great Yarmouth</td>
<td>Seaside town with a rich maritime heritage and bursting with arcades, rides and attractions and a huge expanse of pristine beach</td>
</tr>
<tr>
<td>South Norfolk</td>
<td>Scenic and peaceful countryside, with winding lanes, thatched cottages, welcoming pubs and picturesque villages and market towns</td>
</tr>
<tr>
<td>North Norfolk</td>
<td>Spectacular coastline, fantastic wildlife, miles of glorious beaches, seaside communities and a beautiful hinterland of rolling countryside and picturesque villages and market towns</td>
</tr>
<tr>
<td>Thetford Forest</td>
<td>The largest lowland pine forest in the UK boasts its own unique microclimate, with miles of trails which are great for walkers and cyclists and for picnics</td>
</tr>
<tr>
<td>King’s Lynn and West Norfolk</td>
<td>Glorious coastline of sandy beaches and wildlife reserves and rolling countryside rich in historic houses and buildings, with historic King’s Lynn at its heart</td>
</tr>
<tr>
<td>The Broads</td>
<td>Navigable lock-free waterways and large lakes set in beautiful countryside with many charming and quaint towns and villages</td>
</tr>
<tr>
<td>The Brecks</td>
<td>Unique landscape of classic historic heathland and rugged countryside, boasting UK’s best overall climate with low rainfall and hot summers</td>
</tr>
<tr>
<td>The Fens</td>
<td>A fascinating landscape of reclaimed marshland and wetland, with endless fields of rich soil, drainage canals and rivers</td>
</tr>
<tr>
<td>Waveney Valley</td>
<td>Taking in picturesque market towns and villages, gently rolling countryside and the Southern Broads</td>
</tr>
</tbody>
</table>
Ranking specific areas of Norfolk

- The least appealing areas are typically very rural countryside

- The most appealing areas appear to be either urban or coastal/waterways

Least appealing

- Thetford forest: 48/49/45
- Great Yarmouth: 60/59/67
- Kings Lynn and West Norfolk: 53/53/54
- Norwich: 63/63/63
- North Norfolk: 68/69/62

Waveney Valley: 33/33/33
The Brecks: 35/34/40
The Fens: 29/29/28
South Norfolk: 52/51/56
The Broads: 58/59/52

Weighted scores where min=0 and max=100, shown as overall/visitors/non-visitors

Visit Norfolk
The official visitor website for Norfolk

Q: Please rank these distinct areas of Norfolk in terms of their appeal to you as leisure destinations, either from experience or based on these descriptions?

insightTRACK

Base: all respondents - prompted, single response per rank
Reasons for rankings
(key themes)

Q: Why do you find this area most/least appealing?
Overcoming barriers
Reasons for not visiting Norfolk

- **Getting to Norfolk** is the main deterrent for visiting, with 45% of those over three hours drive saying it’s too far.
- **Preference for other destinations** (particularly those abroad) also play a significant role for around a third.
- Nonetheless, the majority of reasons were quite neutral in nature, and typically more reflective of individual attitudes towards holidays in general rather than specifically Norfolk.
  - 62% of those living within a two hour drive gave a neutral reason.

---

**Reasons for not visiting Norfolk**

- **Too far/takes too long to get there**: 23%
- **Just haven’t got round to it**: 16%
- **Prefer to go abroad**: 16%
- **Already been and like to try new places**: 14%
- **Poor transport links**: 13%
- **Prefer other UK destinations**: 13%
- **Poor weather**: 11%
- **Been too busy to travel anywhere**: 9%
- **Just doesn’t appeal**: 8%
- **It’s too expensive**: 7%
- **Not really aware of Norfolk**: 6%
- **Not enough to see and do**: 6%
- **Boring scenery/unattractive area**: 3%
- **Other: can’t travel (poor health)**: 2%
- **Heard bad things about it**: 1%
- **Other**: 1%
- **No particular reason**: 22%

**Reason type**

<table>
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<tr>
<th>Reason Type</th>
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<tbody>
<tr>
<td>Deterrent</td>
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<tr>
<td>Prefer somewhere else</td>
<td>35%</td>
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<tr>
<td>No particular reason</td>
<td>57%</td>
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Base: 1,077 (all respondents who have not visited Norfolk within the past two years) - prompted, multiple response

**Q:** Which, if any, of these reasons have put you off visiting Norfolk at all, or visiting Norfolk more frequently?
Making Norfolk more appealing to visit

(key themes)

- Transport (to and within) the county was the primary suggestion for making Norfolk more appealing to visit, even amongst those travelling less than two hours:
  - Better roads: faster travel time, fewer traffic jams
  - More transport links: more frequent bus and trains going to and from a wider variety of destinations
- Reducing the (perceived) cost of holidaying in the area could also attract more visitors

Base: 1,601 - unprompted, open response
Q: What, if anything, might make visiting Norfolk more appealing for you?
Staying longer than a day trip
(key themes)

- Although a wide variety of suggestions were made, some key themes emerging were:
  - Notably, these tend to focus on...:
    - ...costs and affordability
    - ...things to do
  - More publicity about what there is to do in the county was particularly noted by those living within a two hour drive
  - No specific types of events were mentioned (just events generally)

Q: What do you think might encourage people to come to Norfolk for longer than a day trip?

Base: all respondents - unprompted, open response
Comparative appeal
The main counties likened to Norfolk were typically either on the South coast or neighbouring Norfolk itself.

- Coastal
- Natural countryside
- Historic
- Villages
- Traditional way of life
- Rural / farming

Counties most similar to Norfolk (key themes):

- Lincolnshire: 11%
- Suffolk: 25%
- Devon: 4%
- Dorset: 3%
- Isle of Wight: 3%
- Kent: 6%
- East Sussex: 3%

Cornwall: 4% = Most similar in reasons for similarity

Visit Norfolk
The official visitor website for Norfolk

Base: 1,601 (all respondents)
Q: Which county would you most liken to Norfolk? Prompted, single response
Q: ...and why? Unprompted, open response
Appeal of Norfolk compared to other UK destinations

In general, Norfolk scored roughly equally - although slightly behind - to most of the other UK destinations, although is seen as slightly more appealing than Suffolk.

However, The Lake District and particularly Cornwall are perceived as markedly more appealing than Norfolk, even amongst recent visitors and those living within a two hour drive.

Findings show the % who find Norfolk a little or a lot more appealing / % who find the area highlighted a little or a lot more appealing than Norfolk and the mean average score of Norfolk’s appeal compared to the other areas specified.

Base: all respondents - prompted, single response per area

Q: Compared to the following UK areas, how appealing to you find Norfolk as a holiday destination?
Consideration/choice of other destinations

(On your last visit to consideration of Norfolk...)

- On their last visit, over half (58%) were only considering Norfolk as a destination
  - The majority of other areas being considered were in the UK - most commonly Devon and Cornwall

- Around a third (35%) of non-visitors have considered visiting Norfolk, of these:
  - Half decided not to go anywhere
  - Locations abroad seem over twice as appealing to this group to those who do visit Norfolk

Base: 1,315 (those who have ever visited Norfolk) - prompted, single response
Q: The last time you decided to visit Norfolk for leisure, were you also considering other destinations?
Base: 101 (those who have not ever visited Norfolk, but have considered it) - prompted, single response
Q: Did you choose another UK destination over Norfolk? Q: Which UK counties were you considering/did you choose instead?
Although some practical issues emerged such as cost, and proximity (particularly amongst those within a two hour drive), Norfolk appears to have to key draws:

- Scenery:
  - Coastal (particularly in sunny weather!) and countryside

- Outdoors activities:
  - Such as bird watching and cycling

Choose Norfolk over other UK counties

Activities:
- Bird Watching
- Seaside destinations
- Changes
- Try something different
- Countryside destinations

Activities:
- Walking/cycling

Recommended

Base: 465 (those considering other UK destinations, but choosing Norfolk)
- unprompted, open response

Q: Why did you then choose to visit Norfolk rather than a different county in the UK?
Information sourcing and communication
Holiday information sourcing

As with planning accommodation, more general information sourcing about UK (and specifically Norfolk) holidays is most typically done online.

Again personal connections (word-of-mouth and memories) are also key.

When searching for information about Norfolk, those within a two hour drive are significantly more likely to have used social media (8%) and less likely to have used destination brochures (8%), accommodation and tourist information websites (both 13%) than those living further away.

Information sources for UK/Norfolk holidays

- General internet search: 69%
- Word-of-mouth: 45%
- Personal memories: 39%
- Tourist information websites: 34%
- Review websites: 34%
- Accommodation websites: 33%
- Destination brochures: 31%
- Newspapers/magazines: 27%
- Social media: 20%
- Holiday TV programmes/channels: 17%
- Newspaper reviews/articles: 15%
- Travel agent's website: 15%
- Travel agent (in-store): 15%
- Holiday blogs: 11%
- Holiday/travel events or shows: 11%
- Holiday apps (phones/tablets): 15%
- None of these: 8%

Might use for any area of the UK (N=1,601)
Used previously for Norfolk (N=1,315)

Base: all relevant respondents - prompted, multiple response

Q: Thinking about when you’re planning a holiday/break/day trip to any area of the UK, which of these sources might you turn to for information?

Q: Thinking about when you have previously planned a holiday/break/day trip to Norfolk, which of these sources have you actually turned to for information?
Holiday information sourcing: tourist information sites

- Visit Norfolk was the prominent tourist information website from this prompted selection
  - Particularly used by visitors aged 55+ (60% have used)

- Trip Advisor also appears to be a key source of information

Websites used for information about Norfolk holidays

- **Visit Norfolk**
  - Used: 46% / might use: 63%

- **Trip Advisor**
  - Used: 34% / might use: 49%

- **VisitBritain**
  - Used: 14% / might use: 13%

Base: all respondents - prompted, multiple response

**Q:** Which tourist information websites have you used / might you use when looking for information about Norfolk as a leisure destination?
Potential use of destination brochures

- Likelihood of using a destination brochure if it was available was polarised
  - Around a third said they were likely to do so (33%) with a similar proportion (30%) thinking they would be unlikely to do so
- However, one in three is notable, recalling that 11% of visitors have actually used them

Base: all respondents - prompted, single response
Q: And if it was available to you, how likely might you be to use a destination brochure (a holiday brochure about a specific area) when looking for information about Norfolk as a leisure destination?
Search terms typically consisted of a theme... (attractions, accommodation or tourism in general) ....followed by ‘in Norfolk’ or occasionally a more specific location such as ‘in the Broads’ or ‘in Norwich’

Norfolk!

Events / activities / attractions

Places to go/visit
Leisure Things to do Attractions

Trip Accommodation

Holiday

Specific areas / locations

Norwich Broads Great Yarmouth

Visit Norfolk

The official visitor website for Norfolk

Visit track
Future visits and recommendations
Likelihood of visiting Norfolk in the future

- Likelihood of future Norfolk visits shows a strong correlation with previous visiting habits, and drive time (67% within a two hour drive, only 48% 3+ hours)
- Other groups significantly more likely to visit than their counterparts are those holidaying with children (62%), couples (62%), and those with at least moderate (£250+ a month) disposable income (63%)

<table>
<thead>
<tr>
<th>Audience &gt;</th>
<th>Overall (N=1,601)</th>
<th>Very recent visitor (N=524)</th>
<th>Recent visitor (N=351)</th>
<th>Non-recent visitor (N=283)</th>
<th>Previous visitor (N=157)</th>
<th>Non-visitor (N=286)</th>
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</thead>
<tbody>
<tr>
<td>Overall evaluation &gt;</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>% saying 'quite' or 'very' likely &gt;</td>
<td>58%</td>
<td>83%</td>
<td>63%</td>
<td>49%</td>
<td>34%</td>
<td>28%</td>
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<tr>
<td>Mean average &gt;</td>
<td>3.6</td>
<td>4.2</td>
<td>3.7</td>
<td>3.4</td>
<td>3.1</td>
<td>2.9</td>
</tr>
</tbody>
</table>

Base: all respondents - prompted, single response

Q: How likely are you to consider visiting Norfolk in the future?
Net promoter scores (likelihood of active recommendations) were generally low, even amongst recent visitors.

- Those within two hours also scored quite negatively at -11.
- Very recent visitors are the most likely group to recommend a visit to Norfolk to a friend, although this is still only a moderate NPS score.

Would you recommend a visit to Norfolk to a friend?

- Non-recent visitor: -38
- Recent visitor: -27
- Previous visitor: -50
- Overall, ever visited: -19
- Very recent visitor: +5

NPS score, where 100=max and -100=min

Base: 1,315 (those ever visited Norfolk) - prompted, single response

Q: How likely is it that you would recommend a visit to Norfolk to a friend on a scale of 0 - 10, where 0 = not at all likely and 10 = extremely likely?
Summary
Summary: awareness and perceptions of specific areas

1. **Spontaneous recollection of Norfolk** is limited. Around a third of people cannot accurately place Norfolk on a map, even those who have visited within the past two years! The main urban areas of Norwich and Great Yarmouth are best known, but more rural areas are relatively unfamiliar.

2. **Urban areas are both the most visited and most appealing destinations.** Great Yarmouth and Norwich are the most visited areas, and are in the top three areas in terms of appeal. Both also ‘stood out’ the most, with Cromer also a potential draw.

3. **The Broads stands out as particularly popular area.** Well visited, and praised for scenic boating and wildlife, the Broads are appealing to most and reasonably well known.

4. **However, more rural areas are less appealing.** The heathlands and marshlands of the Brecks and the Fens are notably less appealing than most other areas of Norfolk, and also have very low top-of-mind presence.
Summary: appeal and barriers

- Being a coastal county seems to be Norfolk’s biggest asset.
  - The coastline/beaches are the most visited attraction and the most frequently mentioned ‘best thing’ about the county. They also play an important role in choosing Norfolk over other UK holiday locations.

- The ‘great outdoors’ is also key to Norfolk’s appeal.
  - Activities such as walking, boating and bird watching are popular - reflecting the fact that being ‘outdoorsy’ is also the most common characteristic of visitors. Moreover, the countryside scenery often has an influence on choosing Norfolk over other UK destinations.

- Poor transport links are the main barrier to visiting.
  - Poor road networks were the most frequently mentioned ‘worst thing’ about Norfolk, with better public transport and better roads appearing at the top of the list of ways to make the county more appealing to visit.

- Once in Norfolk, some feel there is not much to do.
  - Being boring, with little to see and do were key reasons for poor rankings of the different areas, while being ‘flat’ was a commonly used descriptor for the county.

- Norfolk is similar to counties on the South coast... but perhaps less appealing.
  - Counties in the South West are the key competitor set for consideration, and although Norfolk scores about the same as Dorset, Cornwall is seen as notably more appealing as a holiday destination.
Summary: holiday behaviours and planning

Visits are typically quite short

The majority of breaks taken are only a few days long, although taking a week’s holiday is the most popular length. Staying over a week is relatively rare

Summer is the crucial holiday season

June to August are key, although a not insignificant proportion also visit in April, May and September potentially extending the season from spring to autumn

The internet is key for planning

Going online is the most commonly used way of both sourcing information and actually booking accommodation. The primary search terms for information are ‘things/places to go... in Norfolk’

Visit Norfolk’s website is particularly popular

Use of visitnorfolk.co.uk is frequently used when looking for information about Norfolk - notably more than tripadvisor.com

Daily spend is highest on short breaks

Those only staying for two days spend, on average, twice as much per day than those staying for two weeks
Summary:
Focus on those living within a two hour drive

- Those living within a two hour drive of Norfolk, are more likely than others to...

  - visit in the future
  - visit more frequently and more often
  - use social media for information sourcing
  - take a daytrip
  - book accommodation last minute

- ...find more publicity encouraging to visit
- ...find the county appealing
- ...find it somewhat convenient to travel to, and choose to visit due to proximity
SWOT analysis
SWOT: Strengths

- Most people within a 2-hour drive time have visited Norfolk, and visit frequently (around a third have visited more than 10 times)
- The urban areas of Norwich and Gt. Yarmouth are well known, well visited and appealing to many
- The Broads are a key draw to the region and have a distinct offering
- The coastline and beaches are our most visited attraction and play a key role in choosing Norfolk over other UK destinations
- The ‘great outdoors’ is also key to Norfolk’s appeal - the picturesque scenery is frequently cited
- Walking is a key visitor attraction - the landscape offer is ideal for the ‘outdoorsy’ visitors
- The Visit Norfolk website is well-used as an information source and can continue to be used as a hub of Norfolk knowledge
- Norfolk has a wide variety of attractions that are compatible with the types of interests of both previous and potential visitors
**SWOT: Weaknesses**

- A high proportion of those within a 2-hour drive time are visiting as day-trippers not stay-trippers
- Spontaneous awareness of the county’s location is only reasonable at best, even amongst some of those who have recently visited
- Some areas (such as The Brecks, Waveney Valley, South Norfolk and The Fens) are less well-known and less-attractive
- Poor transport links and accessibility, both into and around the county, are key barriers to visiting or visiting more frequently
- The main spontaneous association of the county is that it is “flat”
- Norfolk is likened to other coastal counties, but is rated as less appealing than many other popular UK tourism locations, with Cornwall, Devon and Dorset being notably more appealing
- Views of Norfolk tend to be quite ‘middling’ - most notably, a high number do not think Norfolk “offers unique experiences”
- Tourism is strongly weighted to the months of June to August
- Despite being one of Norfolk’s best assets, a low proportion spontaneously associate Gt. Yarmouth as being a location in Norfolk
SWOT: Opportunities

✓ Converting regional day trippers to become stay visitors by encouraging businesses to join forces and promote overnight stays
✓ Focusing promotional efforts on Autumn to Spring to try and counteract the strong seasonal visiting trend
✓ Ensure press releases are topical and relevant to ensure they are different and have the highest traction with publishers
✓ Strongly emphasise accessibility from London and leverage the A11 developments to counteract poor perceptions of accessibility
✓ Consider how to improve perceptions of travelling within the county
✓ Promoting true points of differentiation (flat, The Broads, climate)
✓ Offering suggested itineraries (segmented by audience types) to enable discovery of attractions and areas of the county
✓ Enabling visitors to customise their visit on the website
✓ Ensuring information at key hubs and touch-points are segmented and offer information as clearly as possible e.g. leaflet displays at stations
✓ Highlighting popular culture e.g. theatre, cinema and fashion shows to attract new visitors
✓ Links to lesser-known areas of the county, using urban areas as hubs e.g. Wells: 43 minutes drive from Norwich
SWOT: Threats

- Whilst promoting positive word of mouth is key, the Net Promoter Score (NPS) for Norfolk is low which is an area of concern moving forwards.
- Norfolk clearly has a diverse offering, but these aren’t well-known and attitudes of “Boring/“Nothing to do” might be hard to shift on the macro scale.
- At the moment, at first glance, Norfolk doesn’t appear to have a clear USP - we need to beware that what we’re offering sounds similar to other counties.
- The beaches, coastline and the broads are key assets, but these are likely to feed into seasonal trends; consideration might be given as to how we can promote an all-year-round offering.
- Even amongst nearby counties, Norfolk is not seen as being particularly accessible - campaigns regarding the new A11 will need to be hard-hitting to penetrate existing pre-conceptions.
- Promoting new and improved transport links will only prove successful if they do indeed improve accessibility into, and around, the county.
- The coastline and scenery are popular assets, but not hugely differentiated from many other counties.
Considerations
Considerations

- Just ‘being there’ is not enough to motivate visit; potential visitors need to be given reasons to visit.

- There appears to be an opportunity to more strongly ‘place’ Norfolk in the minds of people as a leisure destination and compete more strongly with other UK locations.

- ...and in doing so to encourage visitors by getting people to:
  - ...CONSIDER Norfolk as a leisure destination
  - ...be MOTIVATED to visit
  - ...realise they do have the TIME to visit (and that there are resources available to help plan their trip)
  - ...overcome preconceptions about ACCESSIBILITY in and around Norfolk.
Considerations: Barriers and Enablers

-> The barriers to visiting, may be overcome by crafting relevant marketing propositions and associated messaging as indicated below, to guide potential visitors to visit Norfolk (and encourage repeat visiting)

The barriers

Lack of CONSIDERATION/AWARENESS
- Continued promotion of facilities and activities available and accolades e.g. “Holkham beach voted best in Britain”
- Encouraging opinion leaders to visit/write pieces/blog

Lack of ACCESSIBILITY
- Breaking up journeys by ‘area-hopping’
- Clear signposting within and from key hubs such as Norwich
- Promotion of new transport links and journey times

Lack of MOTIVATION
- Develop a clear USP
- Promote reasons to visit: To Relax. To do. To Eat. To get active. To visit seals! Climate etc...

Lack of COMPREHENSION
- Segmentation of offering for different groups (families, couples, maturer, younger, activity-focused)

Lack of MONEY
- Encouraging partnership/joint ventures between attractions (e.g. voucher offers?)

The reward:

Let’s visit Norfolk!

The reward:

The enablers

Visit Norfolk
The official visitor website for Norfolk
Considerations:
Encouraging day-trippers to become stay-trippers

- Looking at what might encourage day-trippers to become stay-trippers, much centres on having “more to do” (events and attractions), cheaper accommodation, organised tours, discounts and more publicity about Norfolk’s offering. Consideration might therefore be given to:
  - Better enabling a more customised visit
  - Providing suggested itineraries
Considerations:
Customisation & Website optimisation

- The Visit Norfolk website is well-used and clearly an instrumental part of the decision-making process for many.
- Consideration might be given to offering further customisation of users’ visits (as per Visit Cornwall) to widen comprehension of what’s on offer and tailor visits to their individual preferences.

![Visit Norfolk website screenshot]

![Visit Cornwall website screenshot]
Consideration might be given to providing downloadable suggested itineraries on the website (and potentially in print as well) to encourage discovery of the different areas, counteract the “There’s nothing to do” mentality and enable discovery of new areas of Norfolk; suggested areas are as follows, based upon visitor and potential visitor interests:

- 5 x Wildlife Itineraries
- 5 x Food-Lovers’ Itineraries
- 5 x Family Itineraries
- 5 x Action-Junkie Itineraries
- 5 x Relaxation Itineraries
- 5 x Walking Itineraries
- 5 x Cycling Itineraries
- 5 x Culture-Lover Itineraries

Furthermore, it might present an ideal opportunity to engage with residents of Norfolk by offering a competition for the best suggested itineraries “by the people who know Norfolk the best”
Considerations: Target areas

- Think also about ‘accessibility’, whilst the 2-hour drive time is clearly important, visitation is perhaps lower than expected amongst people in the West Midlands and Greater London.
- With fast road networks and direct train journeys, these land-locked areas might be a viable targets for promotion in addition to the areas within a 2-hour drive time.

### Home location (ever visited)

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<tr>
<td>Home location (ever visited)</td>
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Considerations: Balancing out the areas most visited

- Visiting is clearly ‘east heavy’

- There appears to be an opportunity to more strongly leverage Norfolk Trails, which act as a natural link between areas and can act as the basis for packages and ‘challenges’ e.g.
  - “Walk the Norfolk Coastal Path”
  - “Cycle the Peddars way” (with an overnight stay in Swaffham?)
  - “Run the Marriott’s Way” (with an overnight stay in Aylsham?)
  - “Ride the Paston Way by horseback”, or...
  - “Walk the whole of Norfolk!”

- Consideration might also be given to co-ordinated cycle hire (or stronger promotion of existing hire options) on Norfolk Trails to increase accessibility between areas within the county
The interests of visitors and potential visitors suggest certain types of publications might prove viable targets for future press releases/articles.
Considerations: Seasonality

- Strategic **pushing/co-ordination of the winter offering** in Norfolk to counteract heavy seasonality trends in the summer months, e.g.:

  - “Seal boat trip and overnight stay”
  - “Ice-skating/ carol singing and a family meal”
  - “Christmas shopping and theatre and/or afternoon tea”
The research appears to suggest that, whilst Norfolk does have a great deal to offer, it is not broadly seen as being different or offering unique experiences.

In moving forward, it is important to be clear about what is a ‘true’ point of differentiation (or ‘different to enough locations to be noteworthy’) and be aware of those that are ‘great to have but not different to other counties’ offerings’.

### Consideration: Norfolk’s points of differentiation

#### Different
- “Flat!”
- The Broads
- Warmest climate
- Cycling: beginners’ paradise (noting increase in popularity)
- Walking: makes walking accessible for all ages and for people with health conditions
- Running: perfect for runners
- Horse-riding: perfect for horse-riding

#### Not different?
- Coastline
- Rurality
- Scenery
- Quaint villages
- History and culture
- Traditional
The A11 opening is a key opportunity to improve perceptions of accessibility into Norfolk.

Whilst undoubtedly much is ‘in the pipeline’ for press releases, the research has again highlighted how important the road link will be.
Considerations: Further areas

- Consideration might also be given to:

- Tapping into emotional messaging/injecting personality, such as Visit Northumberland’s strapline - perhaps creating taglines/branding for the county as a whole and/or for the individual areas?

- Considering and communicating the importance of word of mouth and recommendation to businesses in the area - noting Norfolk’s NPS on the whole is poor
And finally... Dos and don’t for Norfolk businesses

**DO**... buy in to joint ventures and itineraries with other relevant/compatible attractions, accommodation, food outlets to create tailor-made itineraries for the target audience

**DO**... consider joint marketing campaigns with other relevant/compatible attractions, accommodation, food outlets to spread costs and make promotions affordable

**DO**... organise leaflet/promotional materials in a way that is easy to navigate and segment into different target audiences/offerings e.g. family fun, trail guides, shopping, action & adventure

**DO**... consider an online presence as much as possible, and links to other relevant sites

**DO**... get recommended! Pay attention to your customers and encourage them to review your company online

**DO**... carefully consider where to target your promotions to maximise the return on investment

**DON’T**... assume “build it and they will come” - visitors need to know you exist!

**DON’T**... assume everyone knows what you offer and how great it is - “not much to do” is a key barrier to visiting different areas of Norfolk

**DON’T**... assume everyone has the same view of your business as you do - pay attention to Trip Advisor and other review sites, it’s a key information source for visitors
Appendix - Area Breakdown
## Visitor profile

<table>
<thead>
<tr>
<th>Area</th>
<th>Social grade</th>
<th>Children</th>
<th>Ages</th>
<th>Budgets</th>
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<tbody>
<tr>
<td>Norwich</td>
<td>AB/C1</td>
<td>Quite likely</td>
<td>All ages</td>
<td>Wide variety</td>
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<tr>
<td>Great Yarmouth</td>
<td>AB/C1/C2/DE</td>
<td>Most likely</td>
<td>35+</td>
<td>On a budget</td>
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<tr>
<td>South Norfolk</td>
<td>C1/C2</td>
<td>Quite likely</td>
<td>55+</td>
<td>Wide variety</td>
</tr>
<tr>
<td>North Norfolk</td>
<td>AB/C1</td>
<td>Less likely</td>
<td>45+</td>
<td>Wide variety</td>
</tr>
<tr>
<td>Thetford Forest</td>
<td>AB/C1</td>
<td>Quite likely</td>
<td>35+</td>
<td>Wide variety</td>
</tr>
<tr>
<td>King’s Lynn and West Norfolk</td>
<td>AB/C1/C2</td>
<td>Quite likely</td>
<td>45+</td>
<td>Wide variety</td>
</tr>
<tr>
<td>The Broads</td>
<td>AB/C1</td>
<td>Quite likely</td>
<td>45+</td>
<td>Wide variety</td>
</tr>
<tr>
<td>The Brecks</td>
<td>AB/C1</td>
<td>Least likely</td>
<td>55+</td>
<td>Wide variety</td>
</tr>
<tr>
<td>The Fens</td>
<td>AB/C1</td>
<td>Less likely</td>
<td>35+</td>
<td>Wide variety</td>
</tr>
<tr>
<td>Waveney Valley</td>
<td>AB</td>
<td>Less likely</td>
<td>55+</td>
<td>Wide variety</td>
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</table>
## When and where?

<table>
<thead>
<tr>
<th>Area</th>
<th>When</th>
<th>Peak season</th>
<th>How long</th>
<th>Accommodation</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td></td>
<td></td>
<td></td>
<td>Hotels</td>
</tr>
<tr>
<td>Norwich</td>
<td>May-Aug</td>
<td>June</td>
<td>Day trips and short stays</td>
<td>Staying with relatives</td>
</tr>
<tr>
<td>Great Yarmouth</td>
<td>May-Aug</td>
<td>Aug</td>
<td>Short stays</td>
<td>Holiday park</td>
</tr>
<tr>
<td>South Norfolk</td>
<td>April-Sep</td>
<td>June</td>
<td>Short trips and short stays</td>
<td>Holiday park</td>
</tr>
<tr>
<td>North Norfolk</td>
<td>May-Sep</td>
<td>June</td>
<td>Day trips and short stays</td>
<td>Self-catering, camping, B&amp;B</td>
</tr>
<tr>
<td>Thetford Forest</td>
<td>May-Aug</td>
<td>June</td>
<td>Day trips</td>
<td>Self-catering, camping</td>
</tr>
<tr>
<td>King’s Lynn and West</td>
<td>May-Sep</td>
<td>June</td>
<td>Short stays</td>
<td>Self-catering</td>
</tr>
<tr>
<td>Norfolk</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The Broads</td>
<td>May-Sep</td>
<td>June</td>
<td>Day trips</td>
<td>Holiday park, boat</td>
</tr>
<tr>
<td>The Brecks</td>
<td>March-July</td>
<td>June</td>
<td>Day trips</td>
<td>Holiday park</td>
</tr>
<tr>
<td>The Fens</td>
<td>May-Sep</td>
<td>June</td>
<td>Day trips</td>
<td>Hotels, B&amp;B</td>
</tr>
<tr>
<td>Waveney Valley</td>
<td>March-Aug</td>
<td>June/Aug</td>
<td>Short stays</td>
<td>Holiday parks</td>
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</tbody>
</table>
### What and where else?

<table>
<thead>
<tr>
<th>Area</th>
<th>Attractions and activities</th>
<th>Cross-sell opportunities (ranking highly)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>The coast, countryside shopping, walking</td>
<td>Norwich, Great Yarmouth and the Broads</td>
</tr>
<tr>
<td>Norwich</td>
<td>Circus/theatre/shows, events/festivals, art and craft centres</td>
<td>North Norfolk, Thetford Forest</td>
</tr>
<tr>
<td>Great Yarmouth</td>
<td>Amusement arcades/bingo, circus/theatre/shows, indoor sports</td>
<td>North Norfolk, King’s Lynn/West Norfolk</td>
</tr>
<tr>
<td>South Norfolk</td>
<td>Museums/heritage sites, heritage railways, bird watching, adventure activities, cycling</td>
<td>North Norfolk, The Brecks</td>
</tr>
<tr>
<td>North Norfolk</td>
<td>Museums/heritage sites, bird watching</td>
<td>South Norfolk</td>
</tr>
<tr>
<td>Thetford Forest</td>
<td>Outdoor attractions, indoor attractions</td>
<td>South Norfolk, North Norfolk</td>
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<tr>
<td>King’s Lynn and West Norfolk</td>
<td>Museums/heritage sites</td>
<td>South Norfolk, The Fens</td>
</tr>
<tr>
<td>The Broads</td>
<td>Boating, art and craft centres, heritage railways</td>
<td>North Norfolk, Waveney Valley</td>
</tr>
<tr>
<td>The Brecks</td>
<td>Museums/heritage sites, heritage railways, bird watching, fishing, horse riding, cycling</td>
<td>Thetford Forest, King’s Lynn/West Norfolk</td>
</tr>
<tr>
<td>The Fens</td>
<td>Bird watching, fishing golf</td>
<td>Thetford Forest, King’s Lynn/West Norfolk, The Brecks</td>
</tr>
<tr>
<td>Waveney Valley</td>
<td>Art and craft centres, bird watching, fishing</td>
<td>North Norfolk</td>
</tr>
</tbody>
</table>