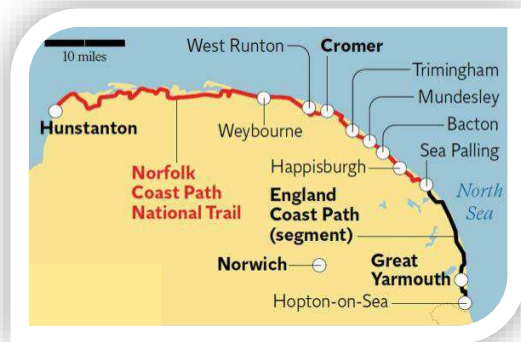




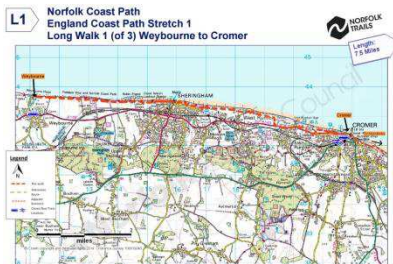
## User Research to Inform Decision-Making *Research findings for Norfolk Trails*

June 2018



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- Background
- Research Objectives
- Methodology
- Respondent profile data
- Research Findings
- Summary & Considerations



- The Norfolk Trails network brings together over 1,200 miles of walks, cycle and bridle routes throughout Norfolk such that the public can discover the area's diverse landscape of unique market towns, rich wildlife and fascinating heritage
- The Norfolk Trails management team are monitoring the usage and visitor experience along four stretches of the trail to inform management decision-making and to optimise the visitor experience
- Norfolk Trails have installed self-registration survey boxes, along with pedestrian counters along the route and trail users are invited to complete a paper questionnaire on-the-spot, or alternatively to complete an online survey at a later date (via SMART survey) (noting Insight Track also carried out some interviewer-led surveys)
- The management team have sought support in the form of research consultancy with regards to the survey design/approach, and subsequent support with analysis - whilst Norfolk Trails take care of the practicalities of fieldwork with questionnaire distribution/collation/data-capture
- This report presents the findings from the Norfolk Trails visitor survey

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## *Overall Business objectives:*

- ➔ To provide a robust fact-base to inform planning with respect to trail development in Norfolk, and visitor experience optimisation

## *Research Assignment Objectives:*

- ➔ To provide consultancy to cross-reference data from pedestrian counters with that from visitor survey submissions to provide an accurate picture of visitor footfall and ensure greatest accuracy / relevancy / value in analysis of the feedback
- ➔ To enable Norfolk Trails to get a measure of the economic/financial impacts and benefits of the trail (derived from visitor spending patterns)

## How?

- Paper based surveys at self registration survey boxes sited along the trail
- Interviewer-led interview sessions at agreed points along the trail

## How many?

- Findings are based on 1,177 surveys, which represent a total sample size of 3,041 trail users (compared to 529 surveys/1,219 trail users in 2016-17)

## Who?

- Trail users passing one of the designated sites

## When?

- Fieldwork conducted between April 2017 to April 2018

## Where?

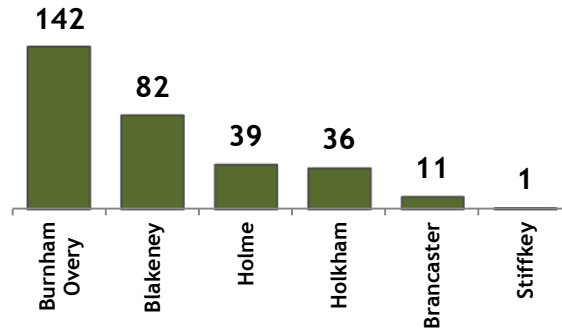
- 17 sites along the trail: Burnham Overy, Blakeney, Holme, Holkham, Brancaster, Stiffkey, Weybourne, Trimingham, Happisburgh, Beeston, Overstrand, Horsey, Waxham, Hopton, Gorleston, Hemsby & Winterton

# Participant location (survey data - number of surveys by location)

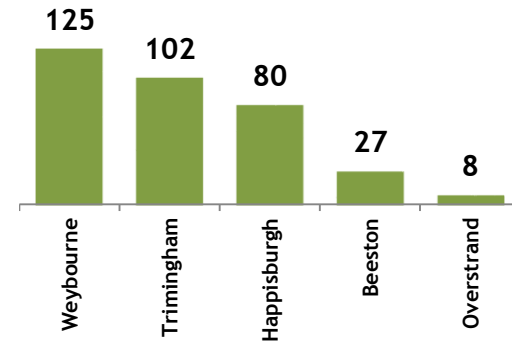
Driven by position of survey boxes

6

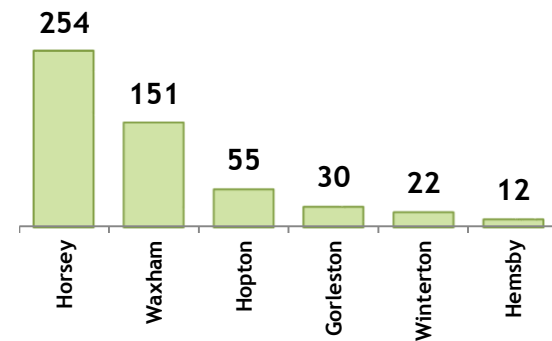
## Stretch 3: 311 surveys (26%)



## Stretch 1: 342 surveys (29%)



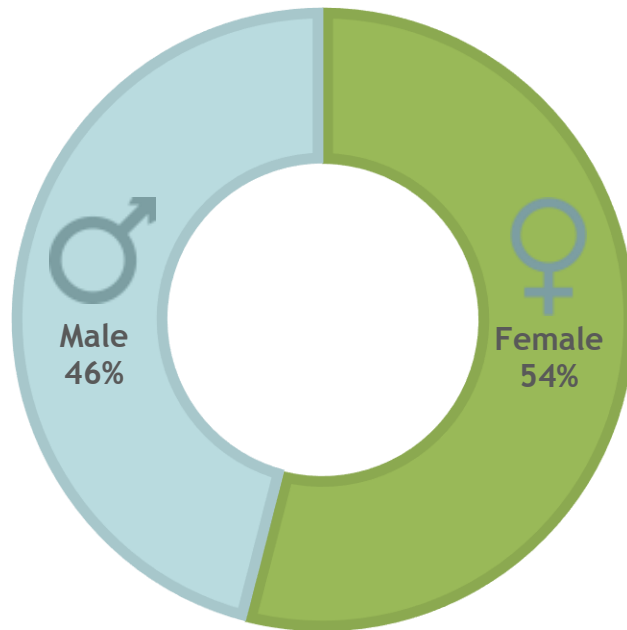
## Stretch 2: 524 surveys (45%)



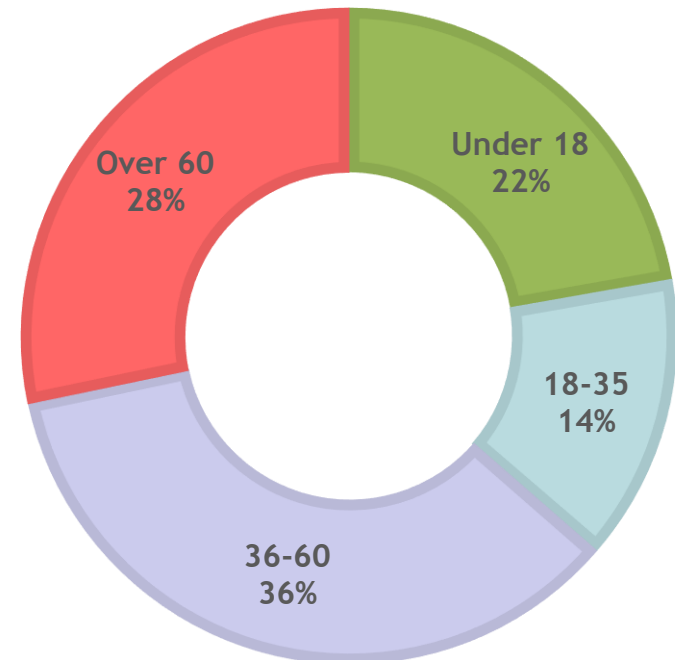
# Participant profiles

Gender profiles were broadly evenly split; age profiles typically 35+ (with 18-35s the least represented) 7

Gender



Age - overall

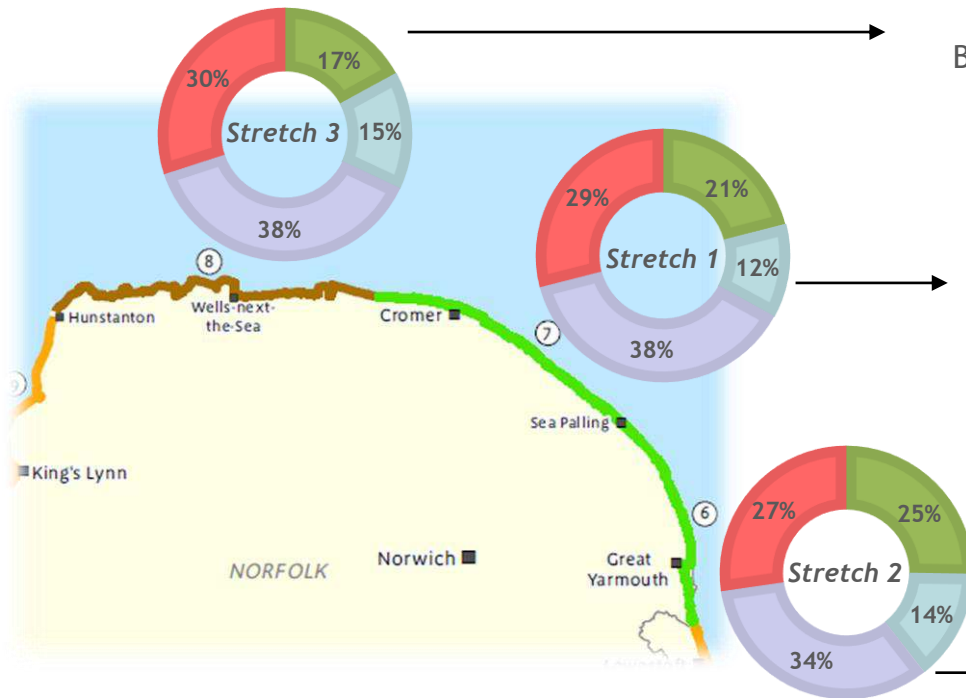


# Participant profiles by location

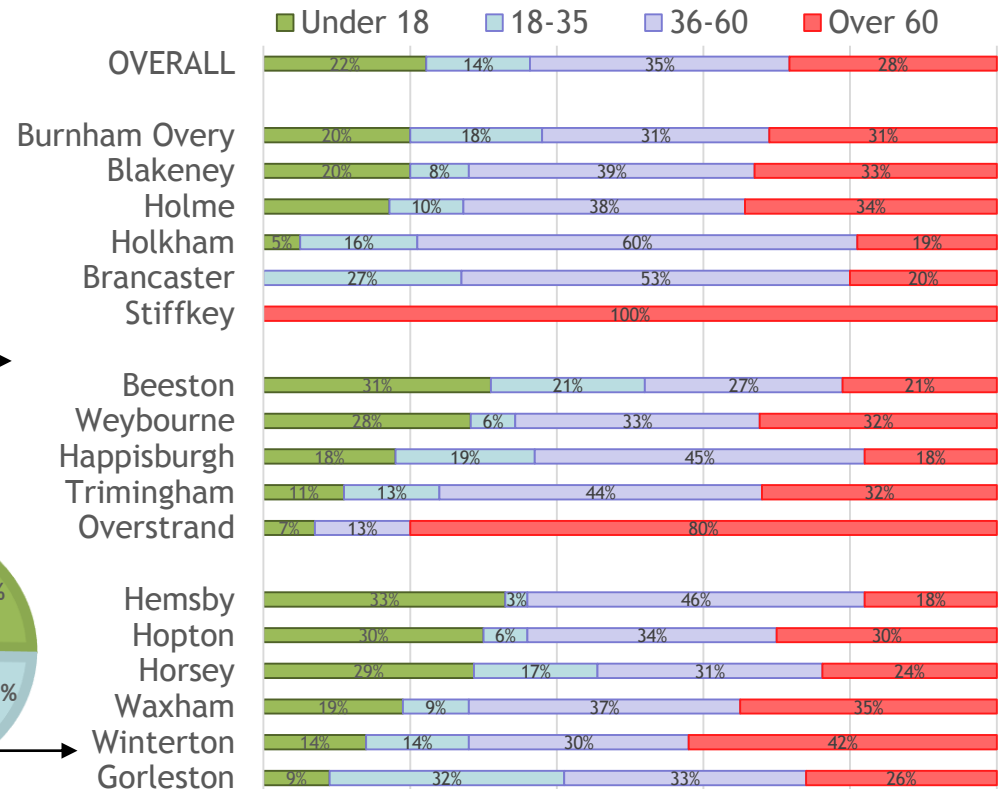
On balance, Stretch 3 has the maturest age profile, whilst Stretches 1 & 2 are slightly more appealing for families; popular specific locations for families are Hemsby, Hopton, Horsey, Beeston and Weybourne

8

## Age - by stretch



## Age - by location





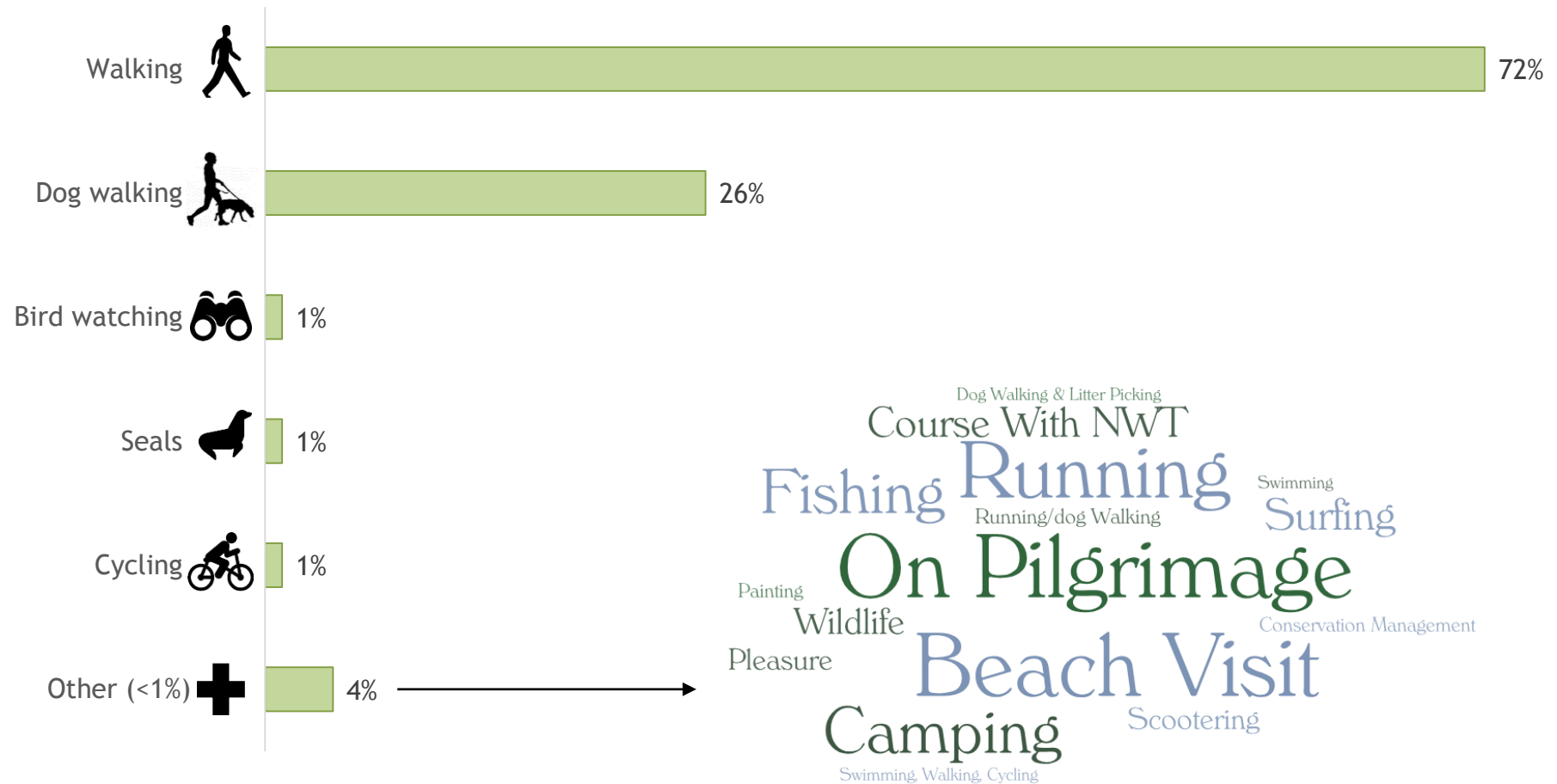
## Research Findings:

# Visiting reason

*Walking, and specifically dog walking, are the main activities on the trails; dog walking is particularly popular in Winterton*

10

*Are you...*

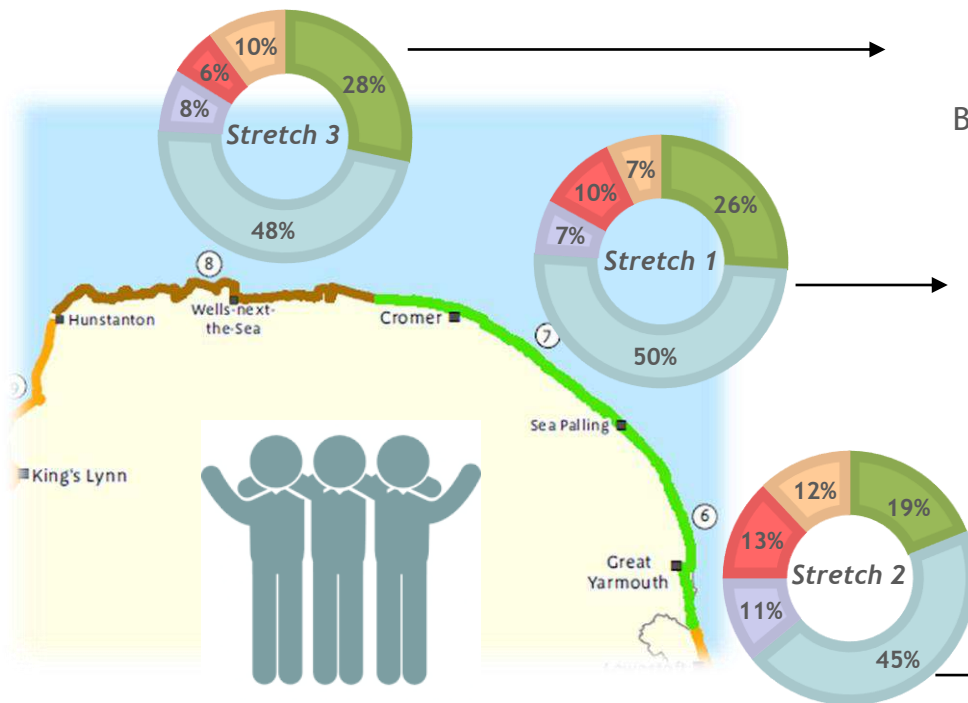


# Party size - by location

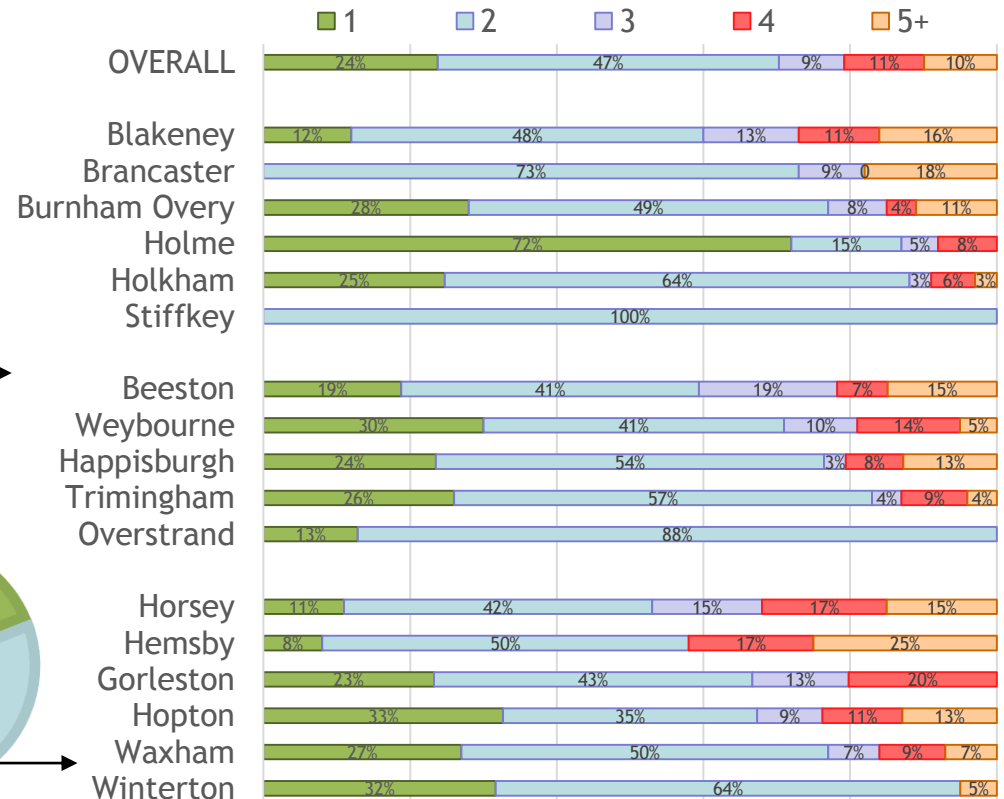
Large differences in party size by location; Stretch 2 has a higher proportion of 3+ party sizes; Horsey, Hemsby, Beeston, Blakeney, Gorleston and Hopton have the largest party sizes; Holme is significantly more likely to have party size of 1

11

## Party size - by stretch



## Party size - by location

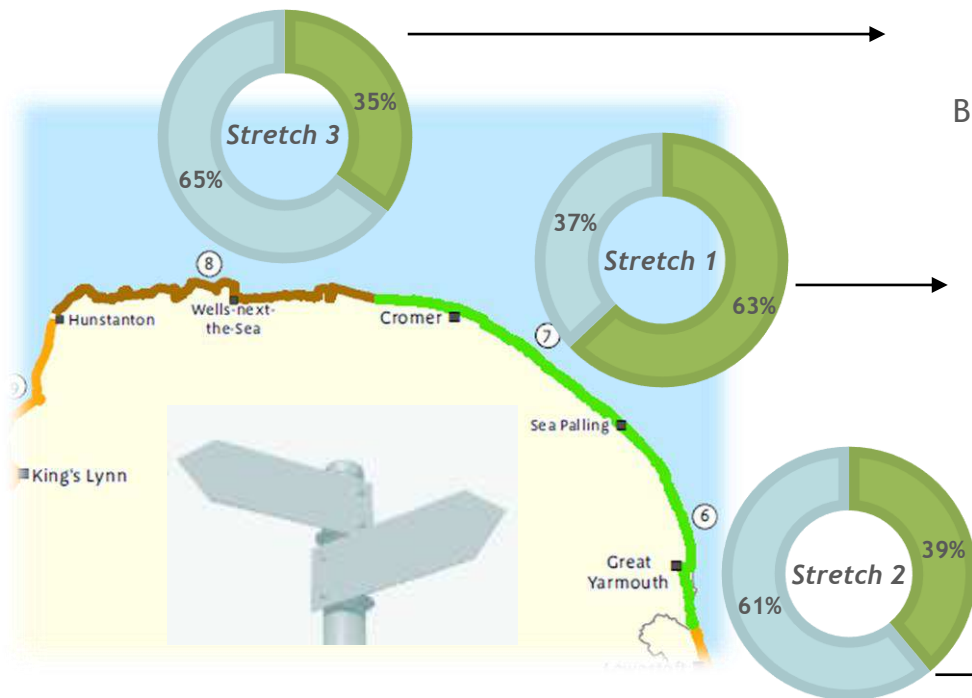


# Passing survey point

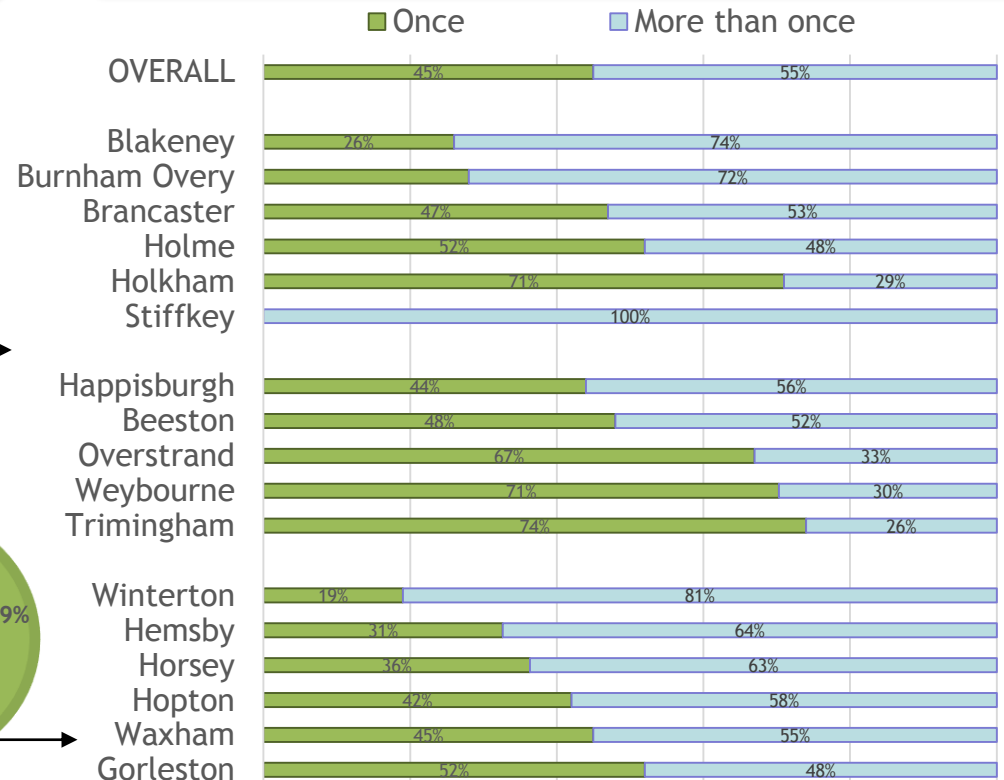
Large differences in 'return' behaviour by location, with Stretch 1 being significantly more likely to only have visitors passing only once; Visitors to Winterton, Blakeney & Burnham Overy are much more likely to pass the counter twice, whilst Trimingham, Holkham, Weybourne and Overstrand visitors are most likely to pass the counter only once

12

## No. times passing survey point - by stretch



## No. times passing survey point - by location



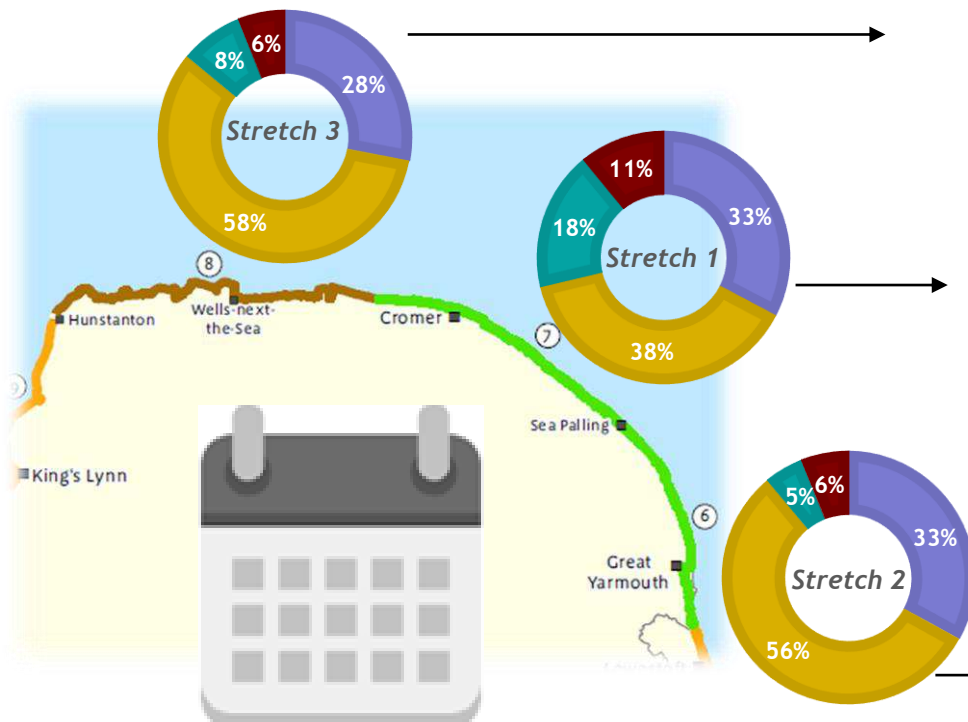
# Length of visit

Stretch 2 attracts visitors for shorter periods overall (particularly Winterton, Horsey & Gorleston); longer trips are evident at Holme, Brancaster, Beeston, Trimingham, Hemsby and Hopton

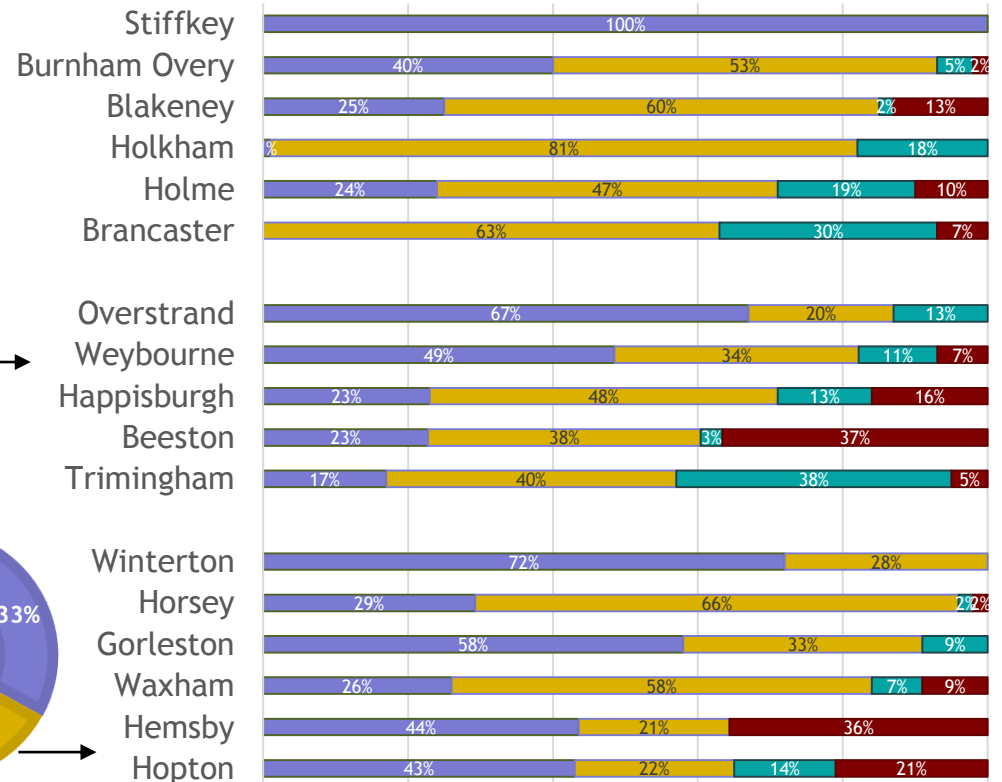
13

## Length of visit - by stretch

■ on a SHORT visit (less than 1 hour) ■ on a PART-day visit (1-4 hours) ■ on a FULL-day visit (5 or more hours) ■ on a long distance trip (more than 1 day)



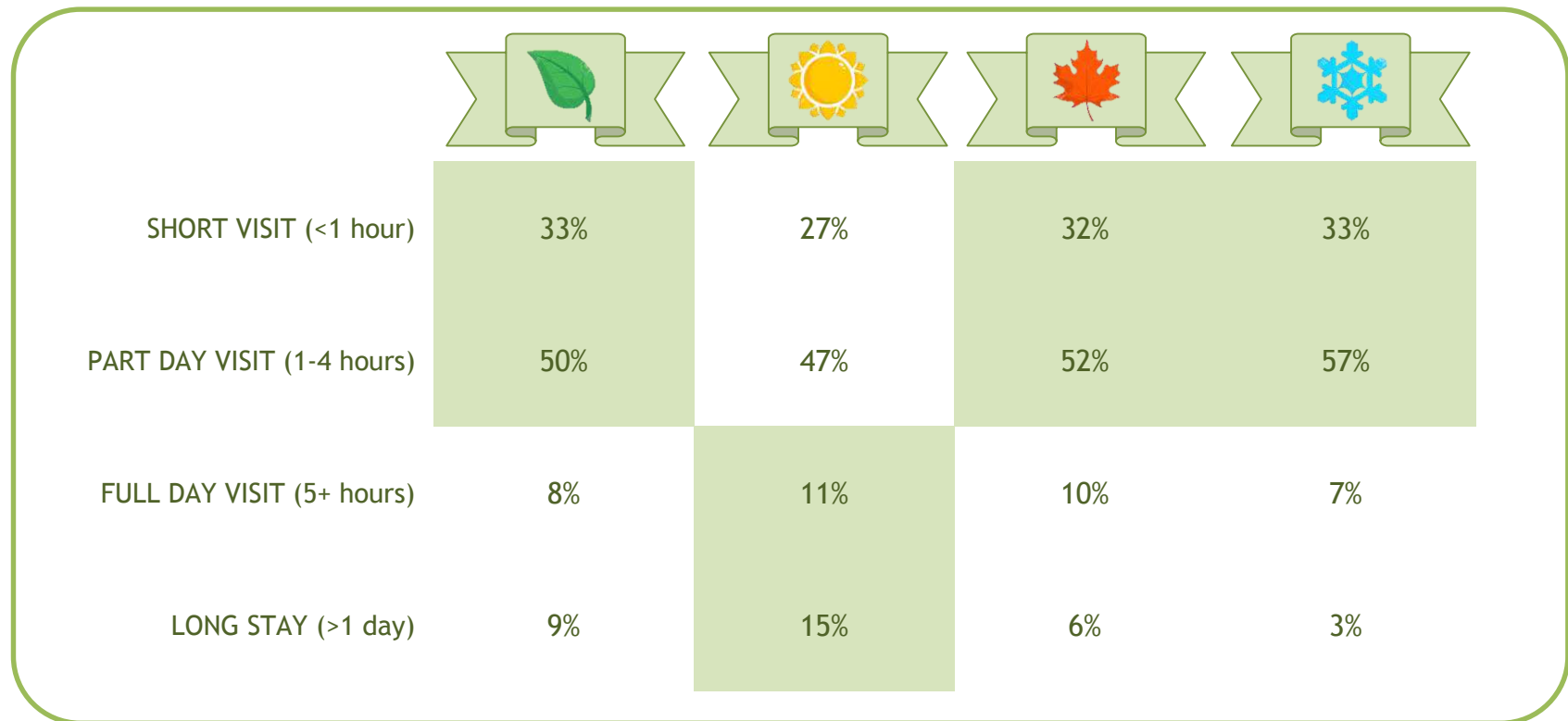
## Length of visit - by location



# Length of visit

Understandably, length of visit increases in the summer, with 1 in 4 staying a full day or overnight (compared to around 1 in 6 in Spring and Autumn and 1 in 10 in Winter)

14



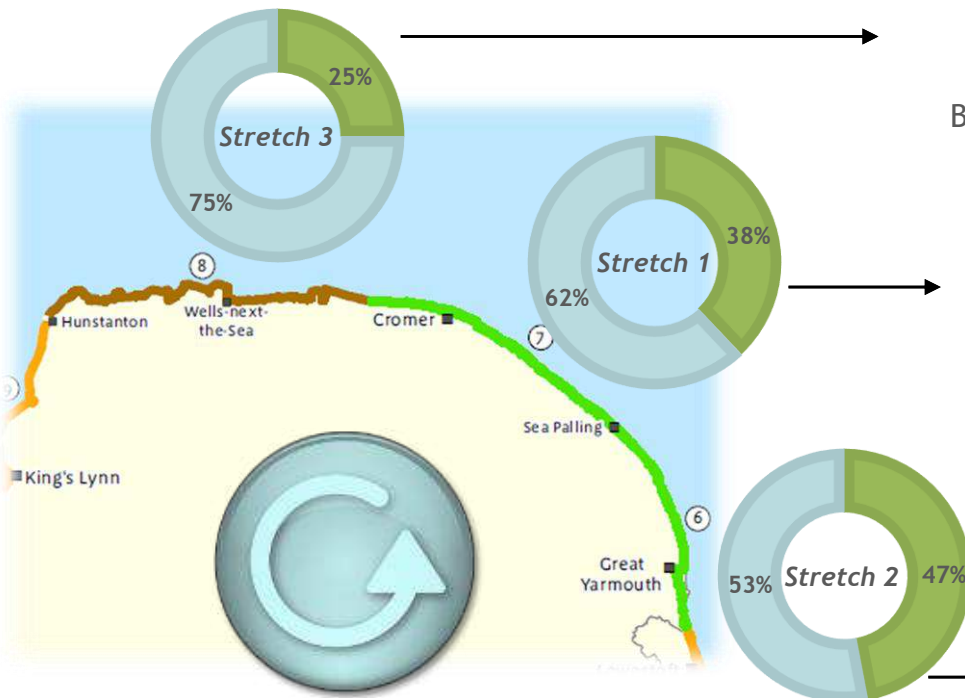
# Repeat visiting

Significant differences by stretch in terms of repeat visiting - Stretch 3 has significantly more repeat visitors than Stretch 2, which has significantly more repeat visitors than Stretch 2 (although Winterton is 100% repeat visitors)

15

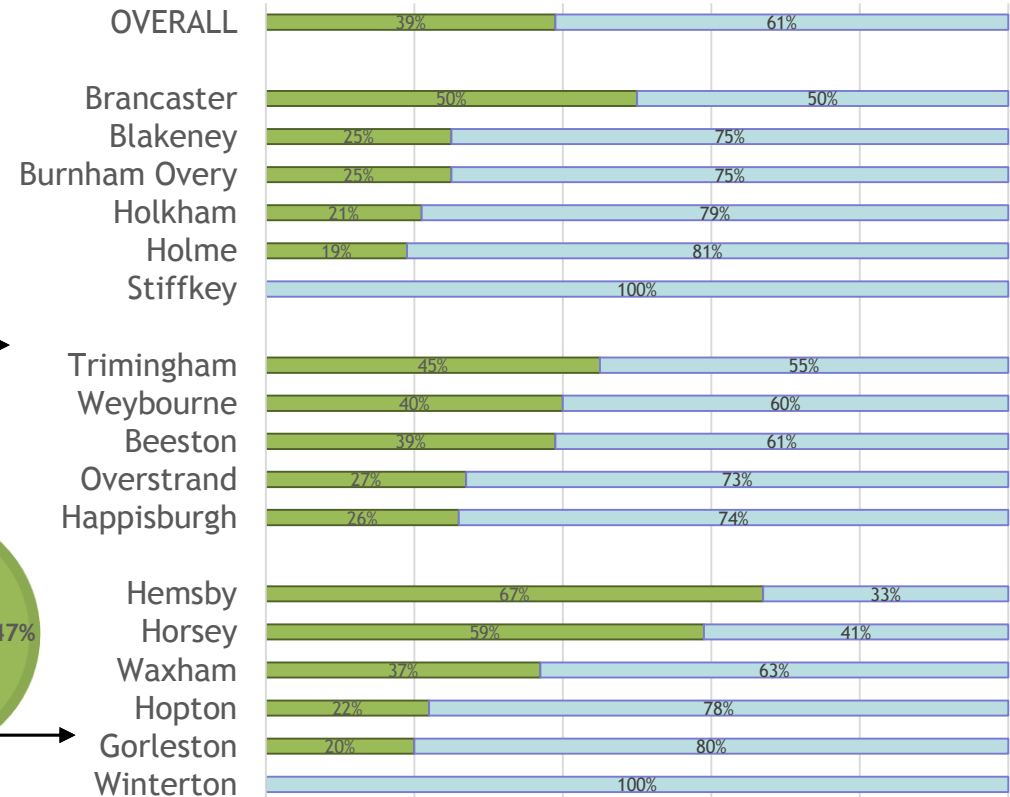
## Repeat visiting - by stretch

■ Yes - first visit



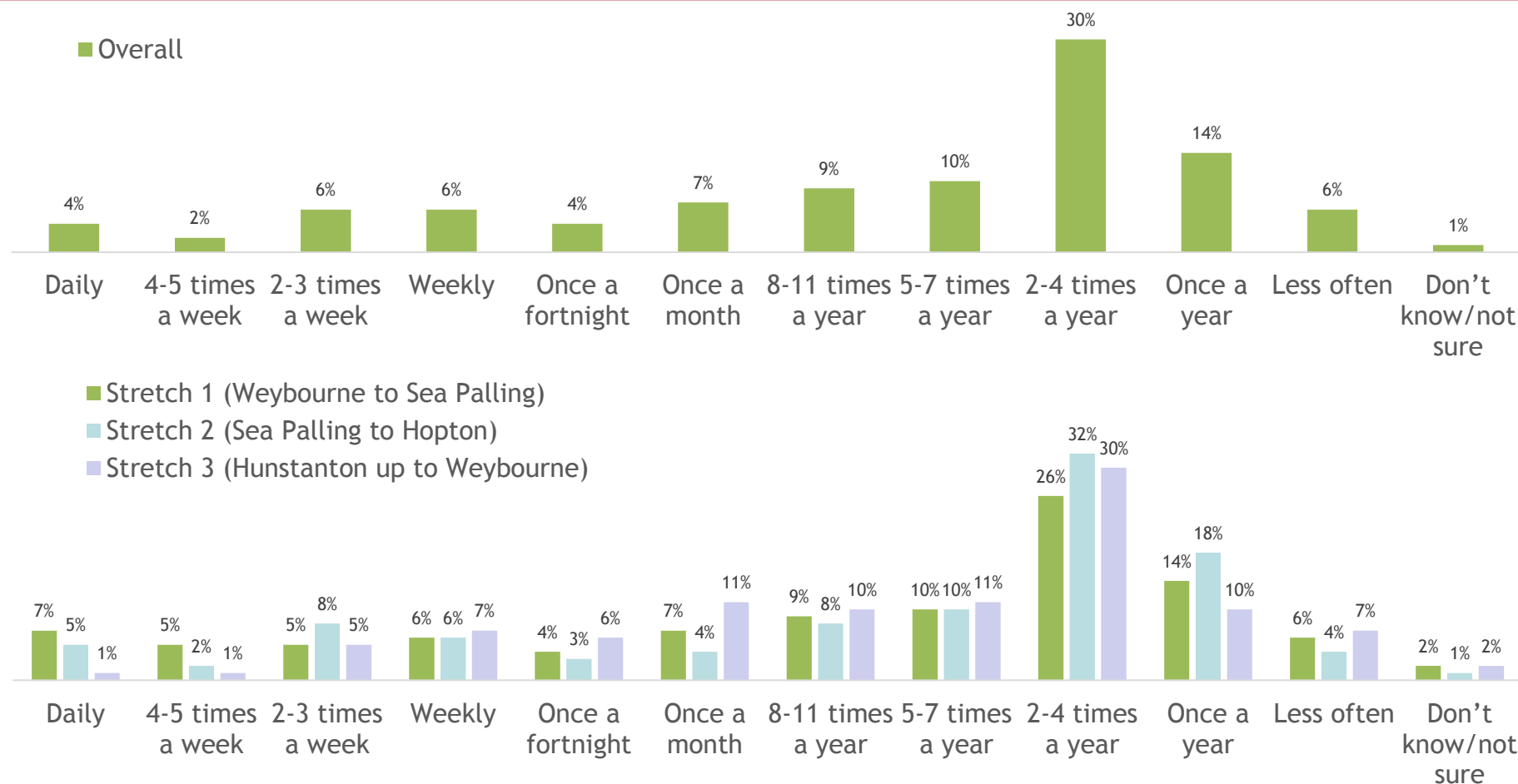
## Repeat visiting - by location

■ No - visited before



# Frequency of repeat visiting

16



\* Suggest simplification of scale for future surveys e.g. Daily, Several times a week, Weekly, Fortnightly, Monthly, Every 2-3 months, Every 4-6 months, Yearly, Less often



# Use of public transport

Around 1 in 10 use public transport along Stretches 1 & 3 but this rises to nearly 1 in 5 along Stretch 2

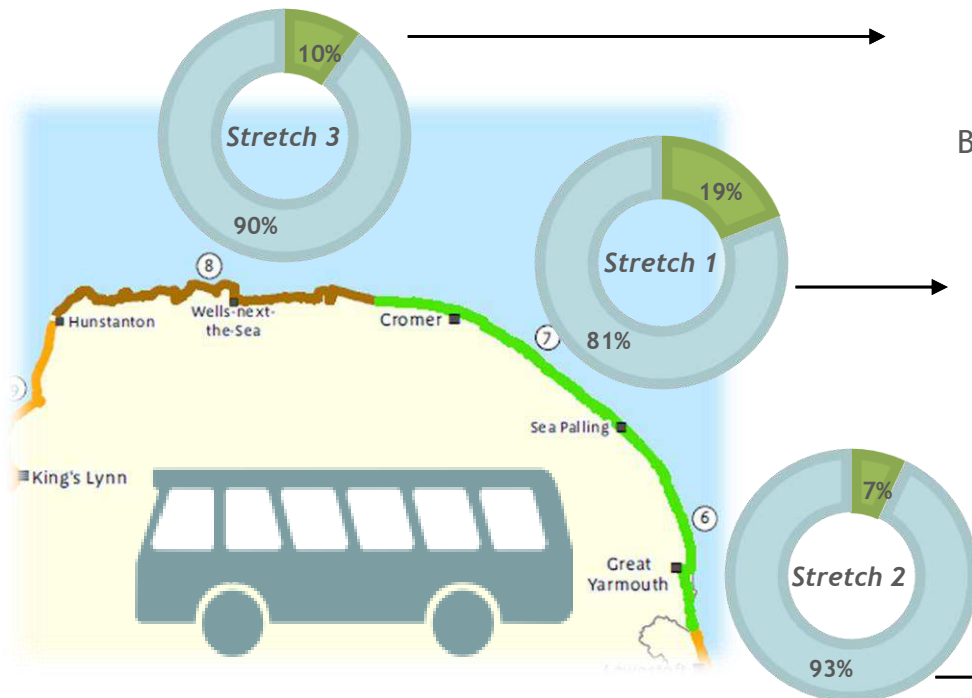
Use of public transport is highest amongst visitors to Trimingham, Beeston and Hemsby;

Use of public transport increases as length of stay increases

17

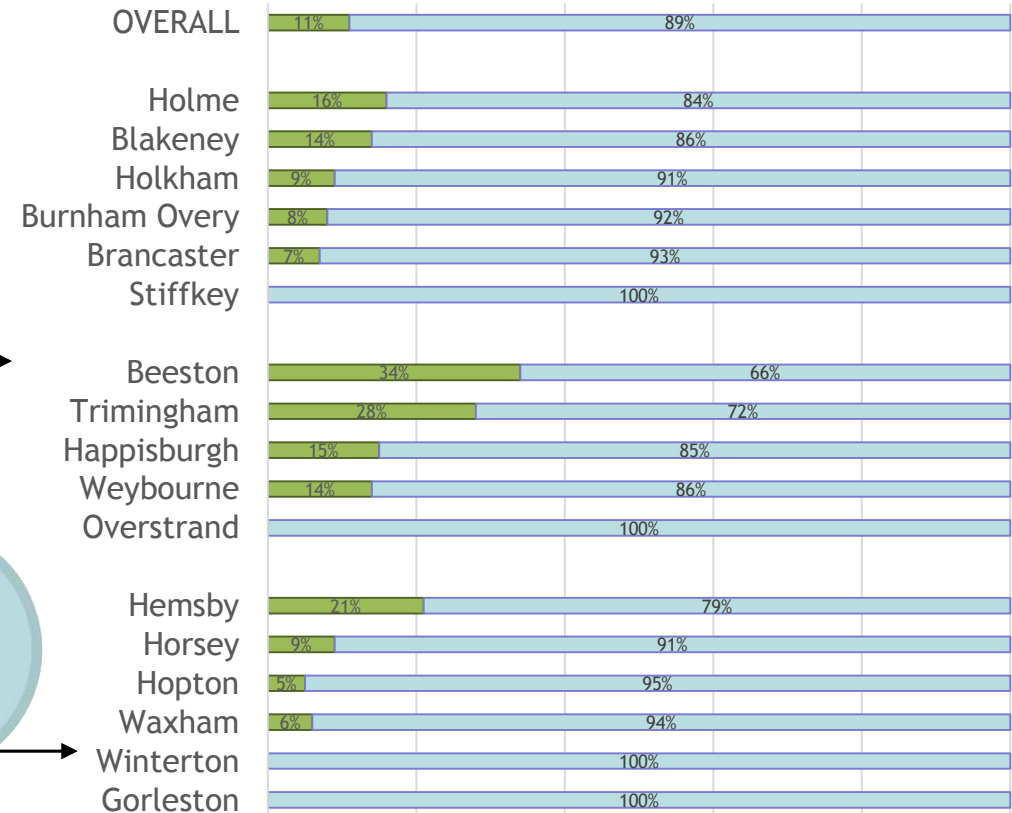
## Use of public transport - by stretch

■ Yes



## Use of public transport - by location

■ No



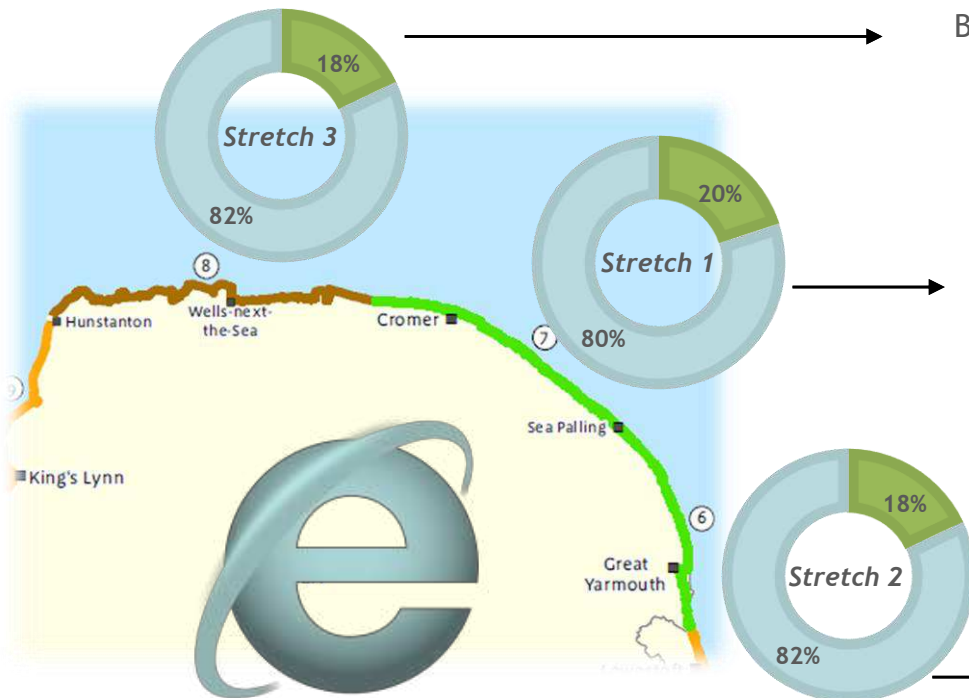
# Use of websites to find information

Use of websites to find out information about the route varies widely for the different trails, being much higher for Burnham Overy, Happisburgh, Overstrand, Trimingham and Horsey; Use of websites increases as length of stay increases

18

## Use of websites for information - by stretch

■ Yes



## Use of websites for information - by location

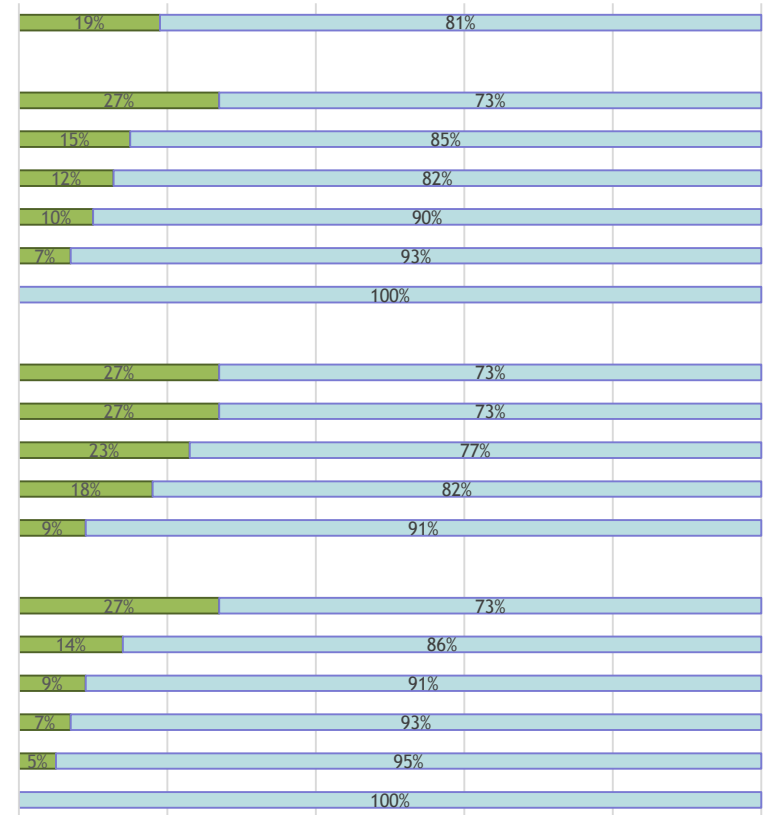
■ No

OVERALL

Burnham Overy  
Holkham  
Holme  
Blakeney  
Brancaster  
Stiffkey

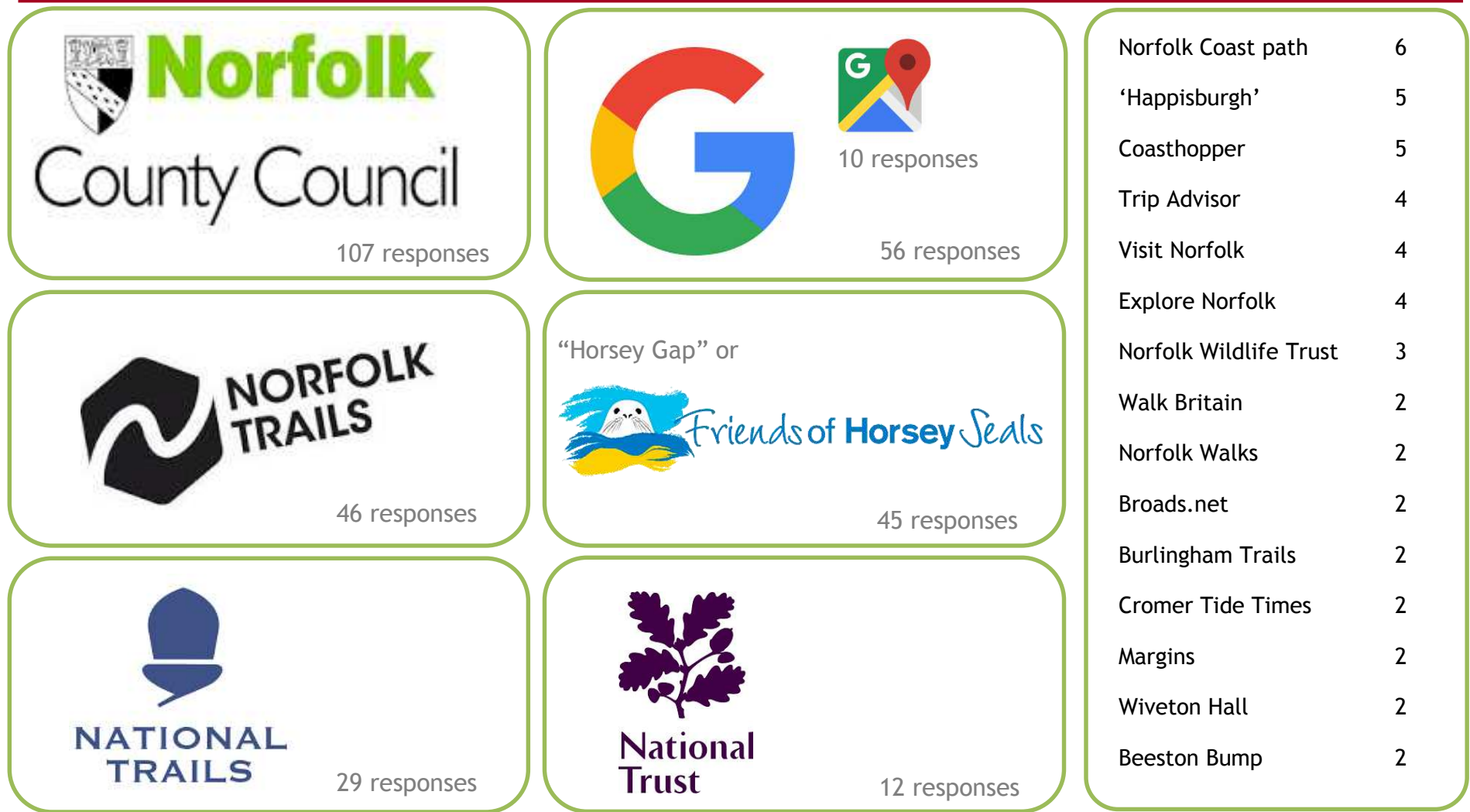
Happisburgh  
Overstrand  
Trimingham  
Beeston  
Weybourne

Horsey  
Waxham  
Winterton  
Hopton  
Hemsby  
Gorleston



# Which websites?

19



# Enjoyment of the Trail

The trails are very much enjoyed by visitors, with only a small minority saying they didn't enjoy their visit

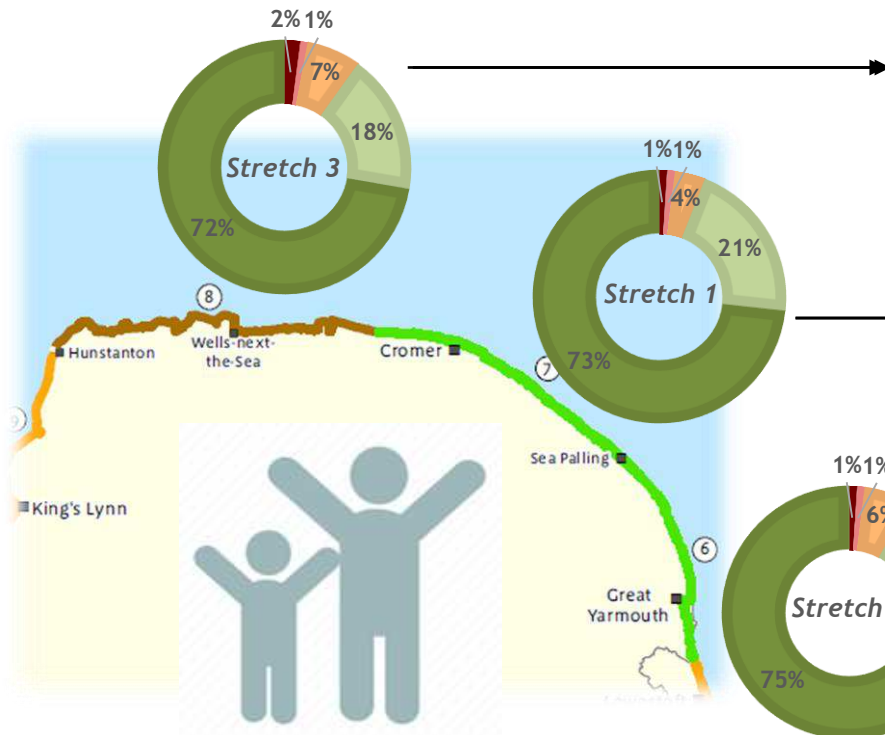
20

## Trail enjoyment - by stretch

1 - Not at all

2

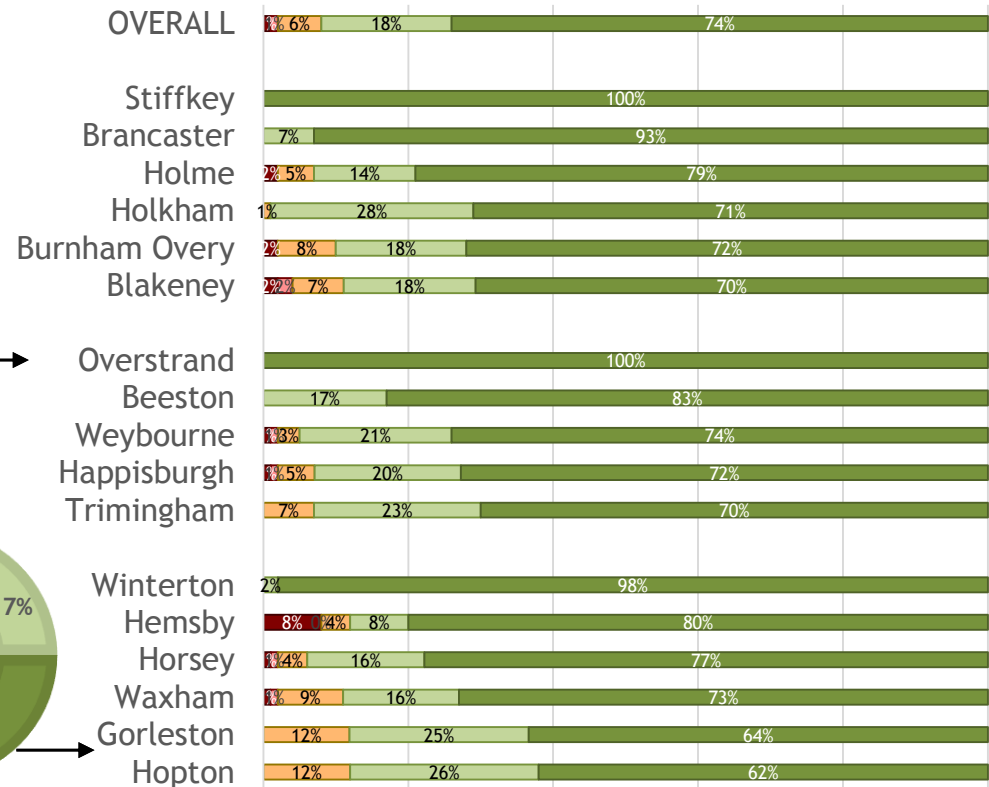
3



## Trail enjoyment - by location

4

5 - Very much



# Returning to the Trail

*There is a strong inclination to return to the trails; even for those who don't intend to return, the majority say they would recommend the trail (see next slide), indicating that it isn't enjoyment of the trail that reduces intent to re-visit*

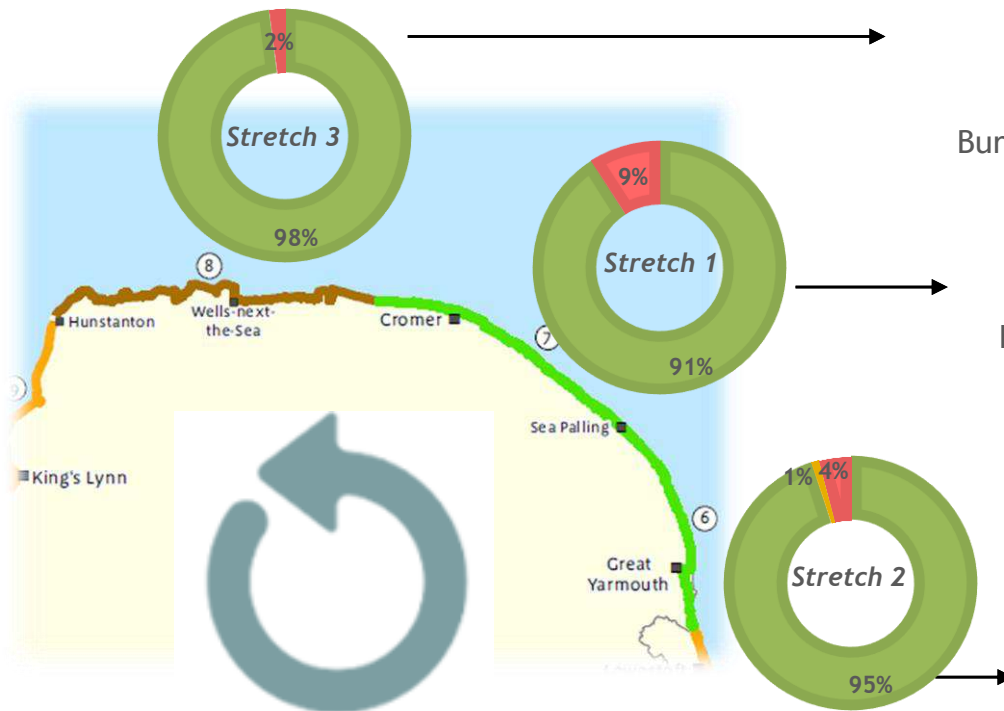
21

## Likelihood to return - by stretch

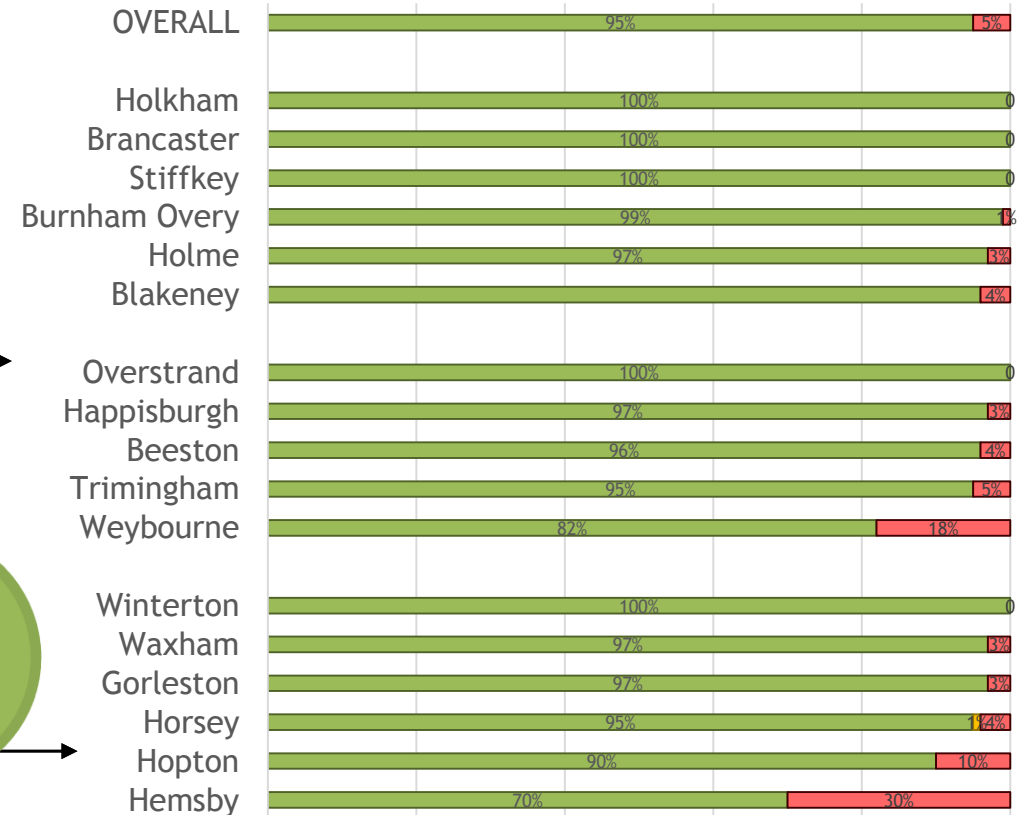
■ Yes

■ Maybe

■ No



## Likelihood to return - by location



# Recommending the Trail

The vast majority of visitors would recommend the trail they visited;

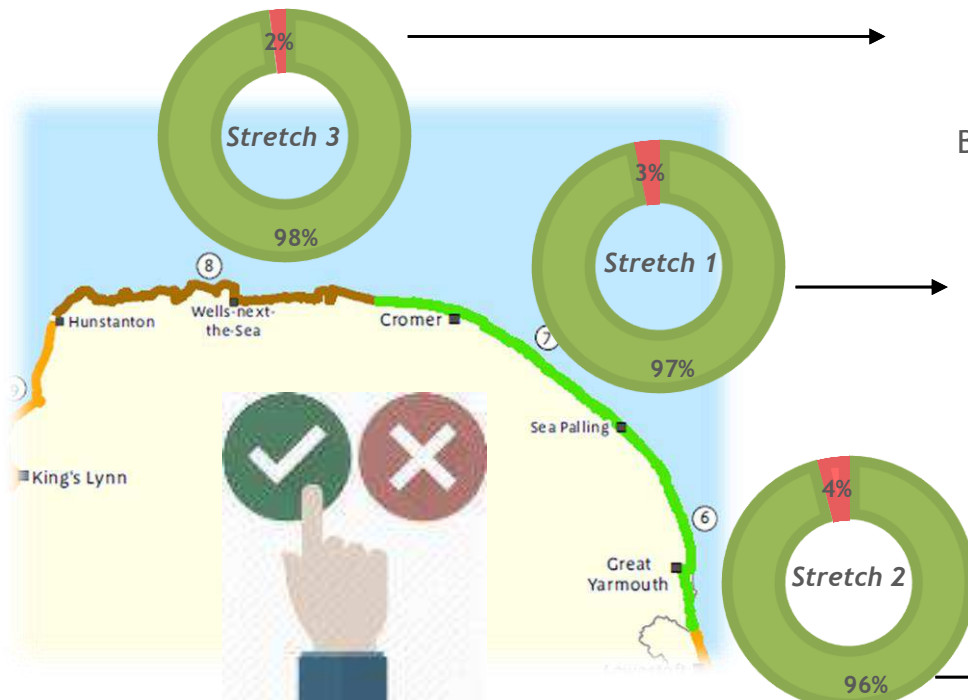
However, Winterton, Hopton and Gorleston stand out, with a notable proportion saying they wouldn't recommend the trail

22

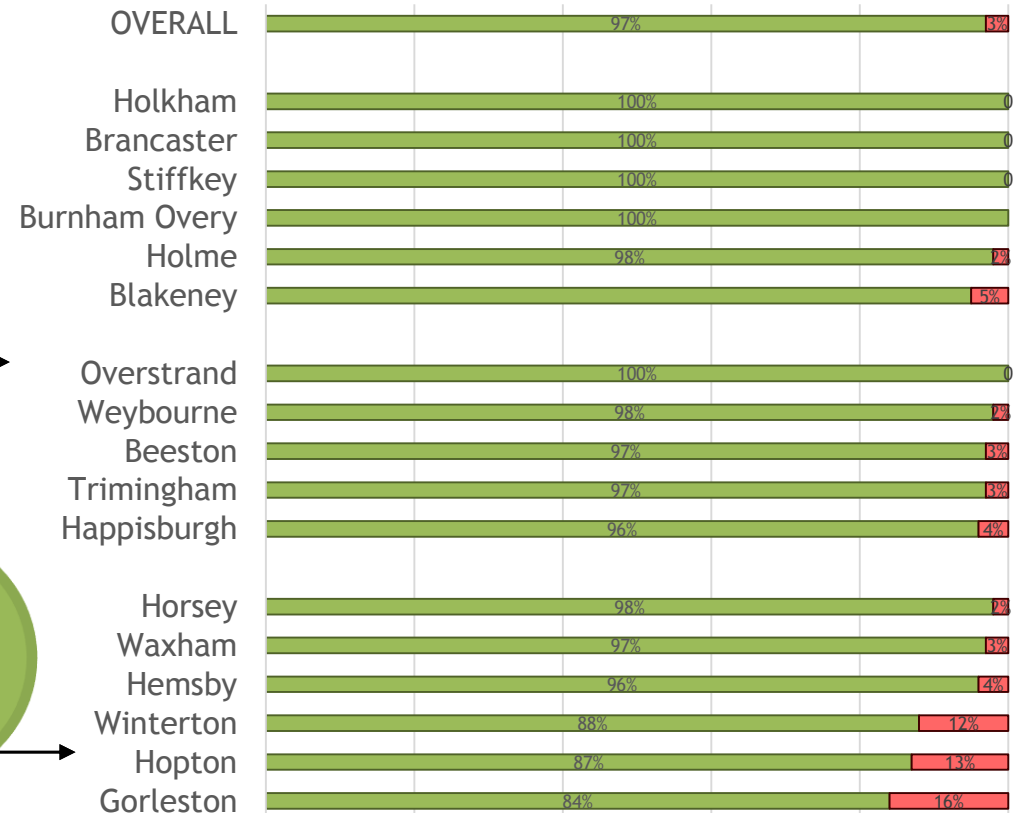
## Likelihood to recommend - by stretch

■ Yes

■ No



## Likelihood to recommend - by location



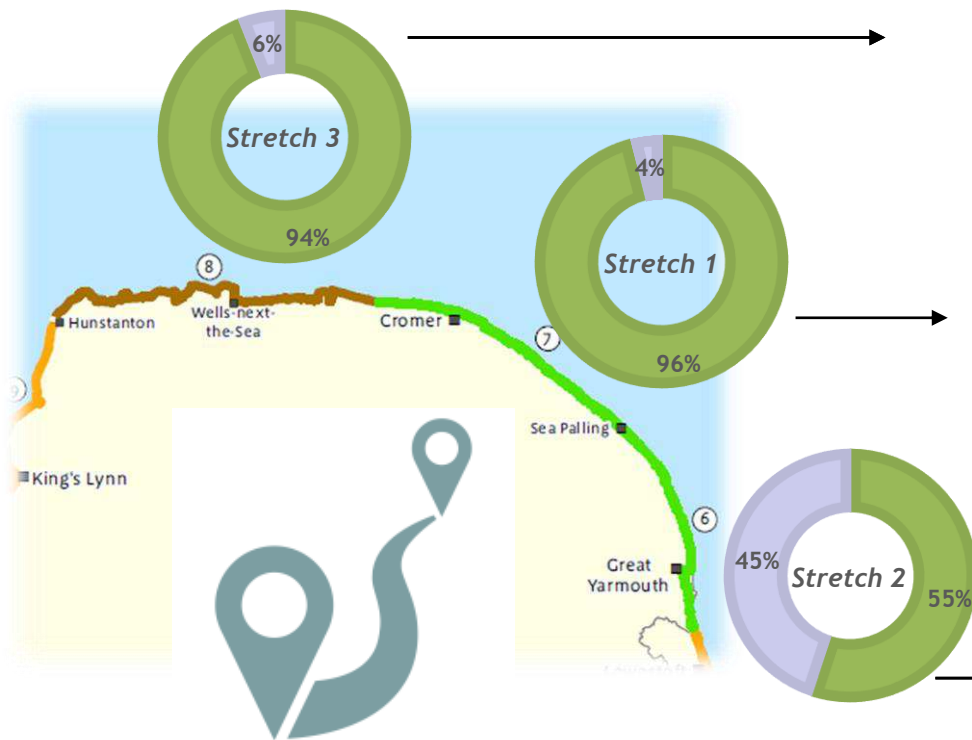
# Was visit incidental or intentional? (interviewer-led surveys)

The vast majority of visitors intentionally visited the trail, although Stretch 2 and particularly Waxham stands out, with many people saying they were visiting the beach rather than the trail 23

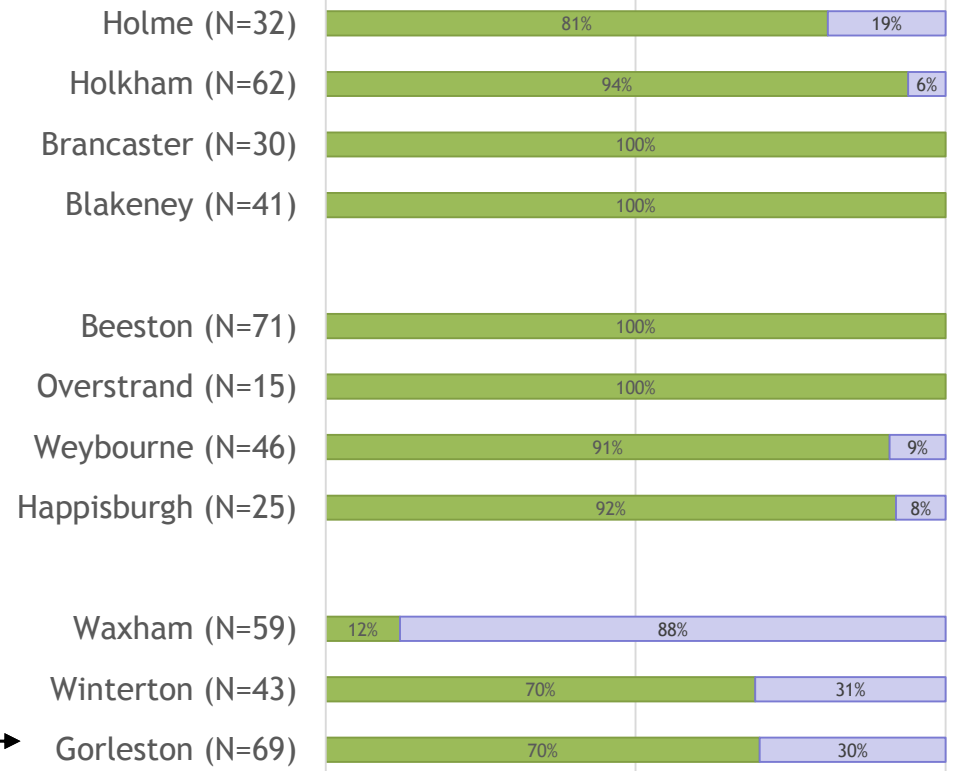
## Intentional or incidental - by stretch

■ Intentional (came to visit the trail itself)

■ Incidental (on your way somewhere else e.g. beach)



## Intentional or incidental - by location



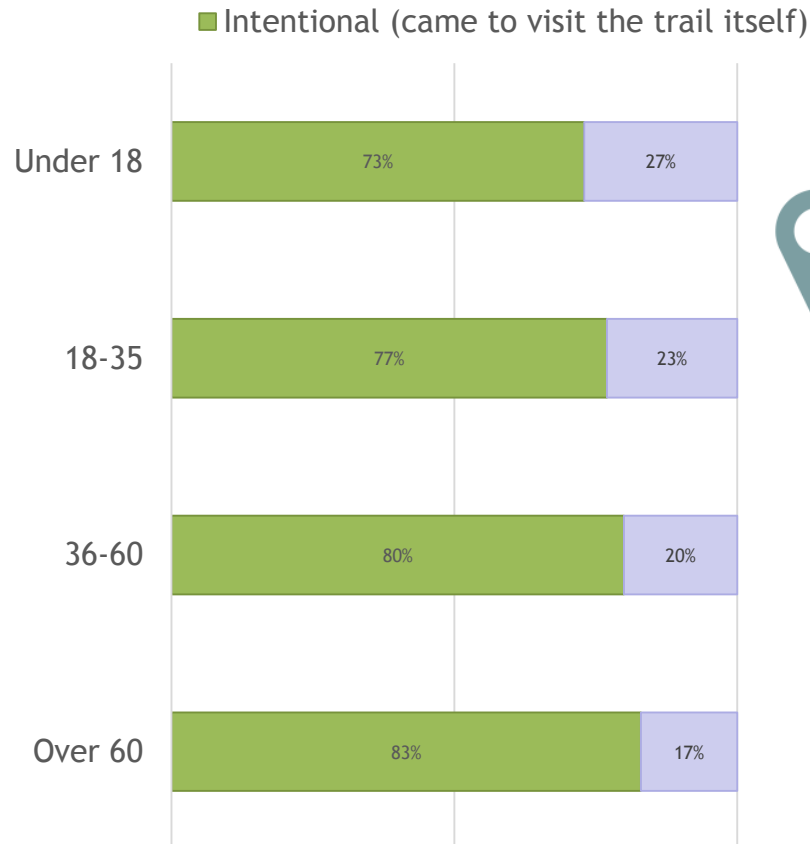


# Was visit incidental or intentional? (interviewer-led surveys)

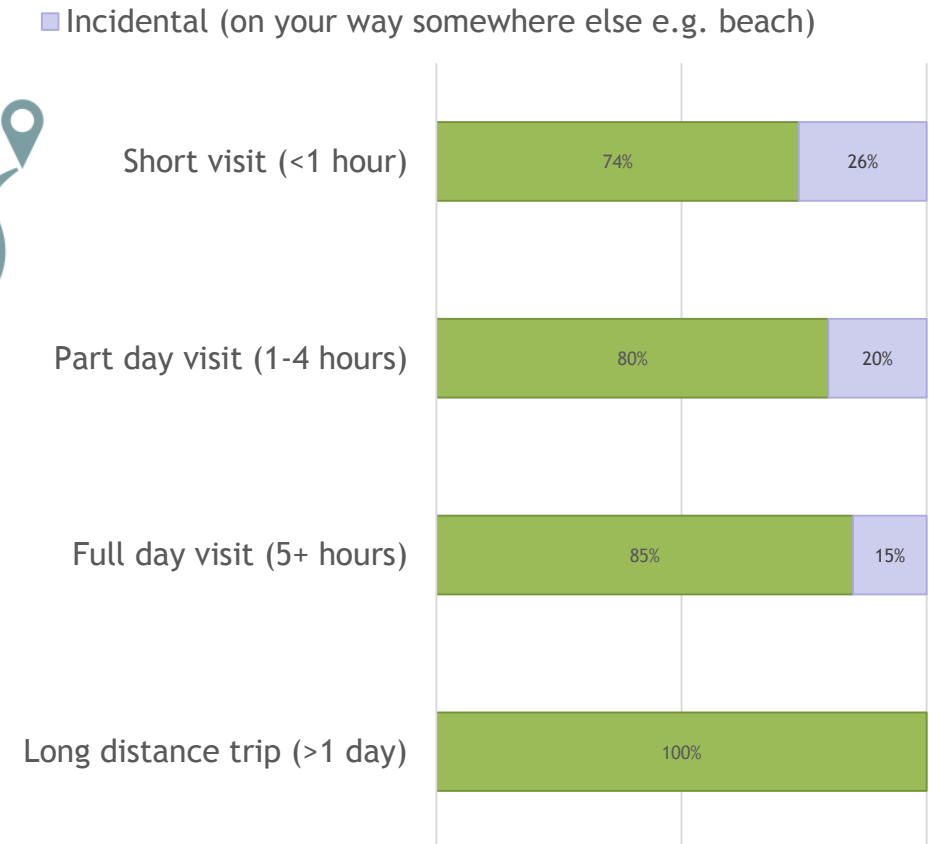
As age and length of stay increases so does 'intentional visiting' i.e. they have specifically come to visit that trail

24

## Intentional or incidental - by age



## Intentional or incidental - by location





# Visitor behaviour (by age)

25



Under 18s	18-35s	36-60s	Over 60s
-----------	--------	--------	----------

Under 35s spending less time on average on the trails than ages 35+



SHORT VISIT (<1 hour)  
FULL DAY VISIT

38%	36%	28%	29%
5%	8%	11%	11%

Under 35s significantly more likely to be first time visitors to the trails



First visit to the trail

44%	48%	38%	33%
-----	-----	-----	-----

Ages 18-35s significantly more likely to be using websites for information about the trail



Use websites for info about the trail

17%	34%	18%	15%
-----	-----	-----	-----

Under 35s more likely to be on an 'incidental' visit, rather than intentionally visiting the trail



Incidental visit?

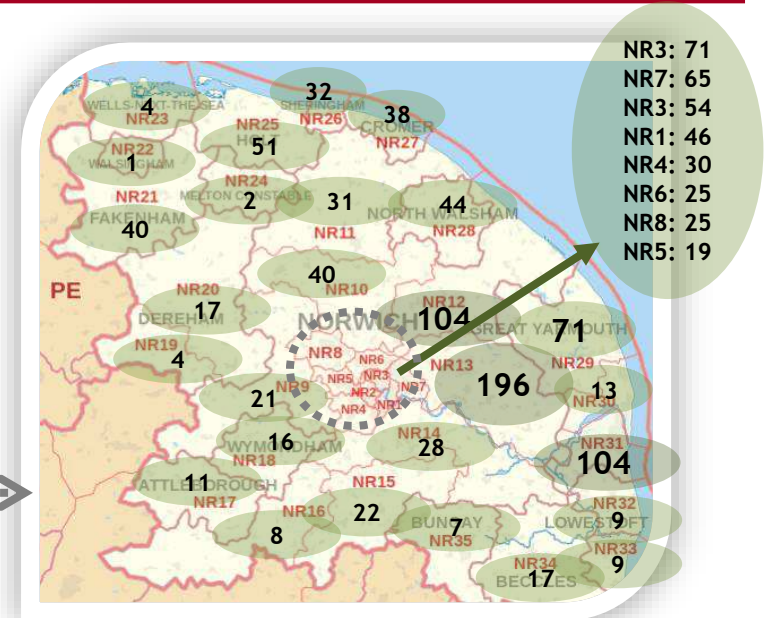
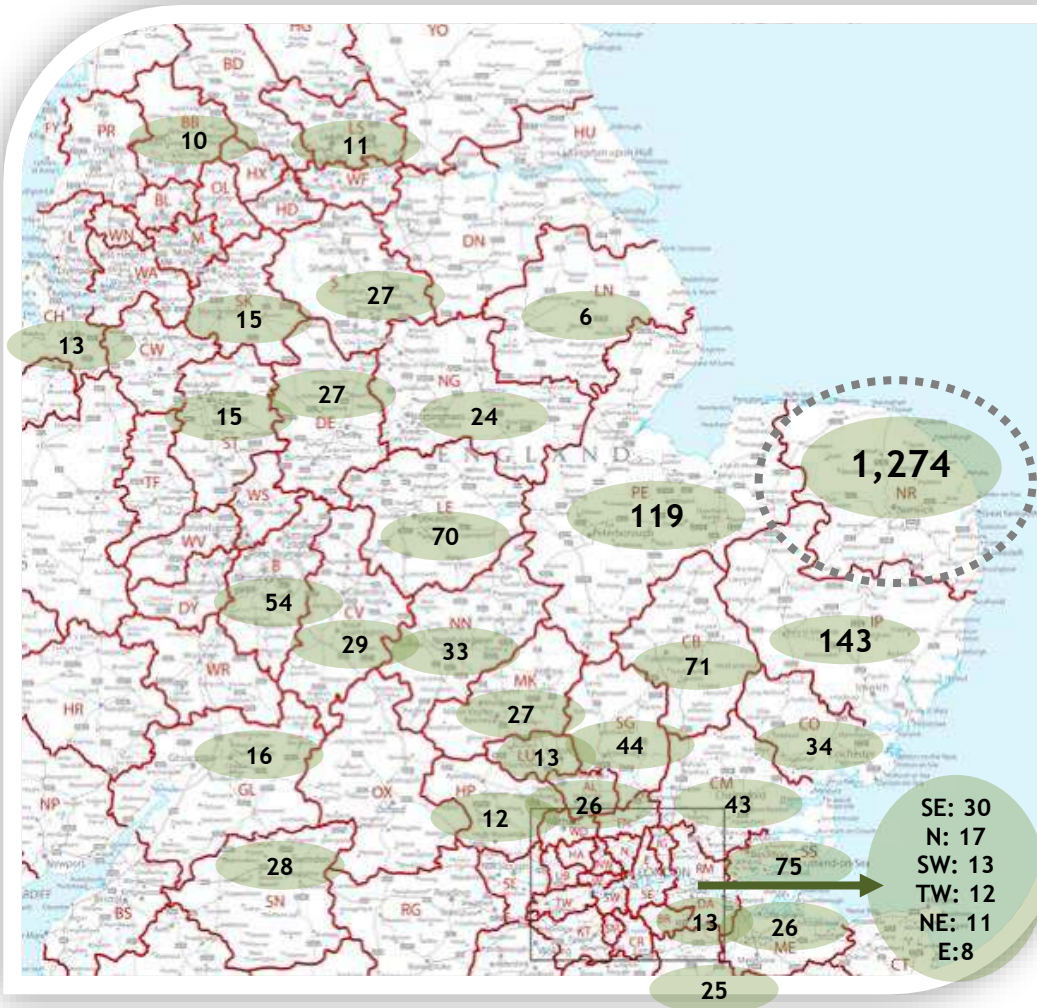
27%	23%	20%	17%
-----	-----	-----	-----

# Location of permanent address (key responses)

Locally, NR13, NR12 and NR31 are the key feeder postcodes for visiting the trail;

Visitors are most likely to travel to the trail from IP and PE postcodes; LE, CB and SS postcodes also feature strongly

26



## Overseas visitors: 36

	8		3
	6		3
	6		1
	5		1
	4		

## Economic impact of the trail

# Total (unfactored) spend





1 in 2 visitors are spending money as part of their visit to the trail (on either accommodation, food & drink and/or other activities), with an average spend of £22.76 across all visitors (N.B. this is a 'raw data figure and does not factor in elements such as return visits or the impact of length of stay')

28

Overall>>



Spend decreases as the trail moves from West to East and in Winter and Spring (noting that spend is highest in Autumn; average spend is highest amongst the 36-60 age group)

Stretch 1 (Weybourne to Sea Palling)	60%	£23.61		48%	£15.51	Under 18*>> 54%	£19.06
Stretch 2 (Sea Palling to Hopton)	51%	£21.11		59%	£27.36	18-35>> 56%	£18.74
Stretch 3 (Hunstanton up to Weybourne)	50%	£25.06		59%	£28.35	36-60>> 56%	£26.95
				44%	£15.69	Over 60>> 49%	£22.39



Q: During your visit to this Trail, approximately how much have you spent on the following, per person, per day, and where? (all spend combined)

\* This does not mean that under 18s themselves are spending this amount but more likely that their responsible adult is

**insight**TRACK





# Spending on accommodation

1 in 4 spent money on accommodation (with an average across ALL trail users - including non spenders - of £12.01) 29

Overall>>



*The highest proportion and value of spenders on accommodation was in Stretch 1 and in Summer and Autumn; ages 36+ spend the most on accommodation*

Stretch 1 (Weybourne to Sea Palling)	32%	£13.03		17%	£7.06	Under 18>> 27%	£10.14
Stretch 2 (Sea Palling to Hopton)	22%	£11.35		32%	£12.78	18-35>> 21%	£8.65
Stretch 3 (Hunstanton up to Weybourne)	21%	£12.17		32%	£16.88	36-60>> 26%	£14.12
				14%	£8.23	Over 60>> 23%	£12.49



# Spending on food and drink





43% spent money on food and drink (with an average across ALL trail users - including non spenders - of £8.79)

30

Overall>>



*Spending on food & drink is highest along Stretch 3 and in the Summer; ages 36-60 are the highest spenders on food and drink*

Stretch 1 (Weybourne to Sea Palling)	49%	£8.80		40%	£6.68	Under 18>> 37%	£6.51
Stretch 2 (Sea Palling to Hopton)	39%	£7.78		53%	£11.56	18-35>> 45%	£8.13
Stretch 3 (Hunstanton up to Weybourne)	45%	£10.81		45%	£9.62	36-60>> 48%	£10.78
				34%	£6.17	Over 60>> 41%	£8.44

# Spending on other activities





Only 15% spent money on other activities, with an average of £1.95

31

Overall>>



*Spend on other activities is highest (in value) along Stretch 3 and in the Summer; those with under 18s are more likely to be spending more money on other activities*

Stretch 1 (Weybourne to Sea Palling)	16%	£1.77		14%	£1.77	Under 18>> 19%	£2.42
Stretch 2 (Sea Palling to Hopton)	17%	£1.98		16%	£3.02	18-35>> 21%	£1.96
Stretch 3 (Hunstanton up to Weybourne)	10%	£2.08		14%	£1.86	36-60>> 15%	£2.05
				16%	£1.30	Over 60>> 9%	£1.46

# Spend by length of visit

*The value of longer stay visitors is evident when looking at spend by length of visit*

32



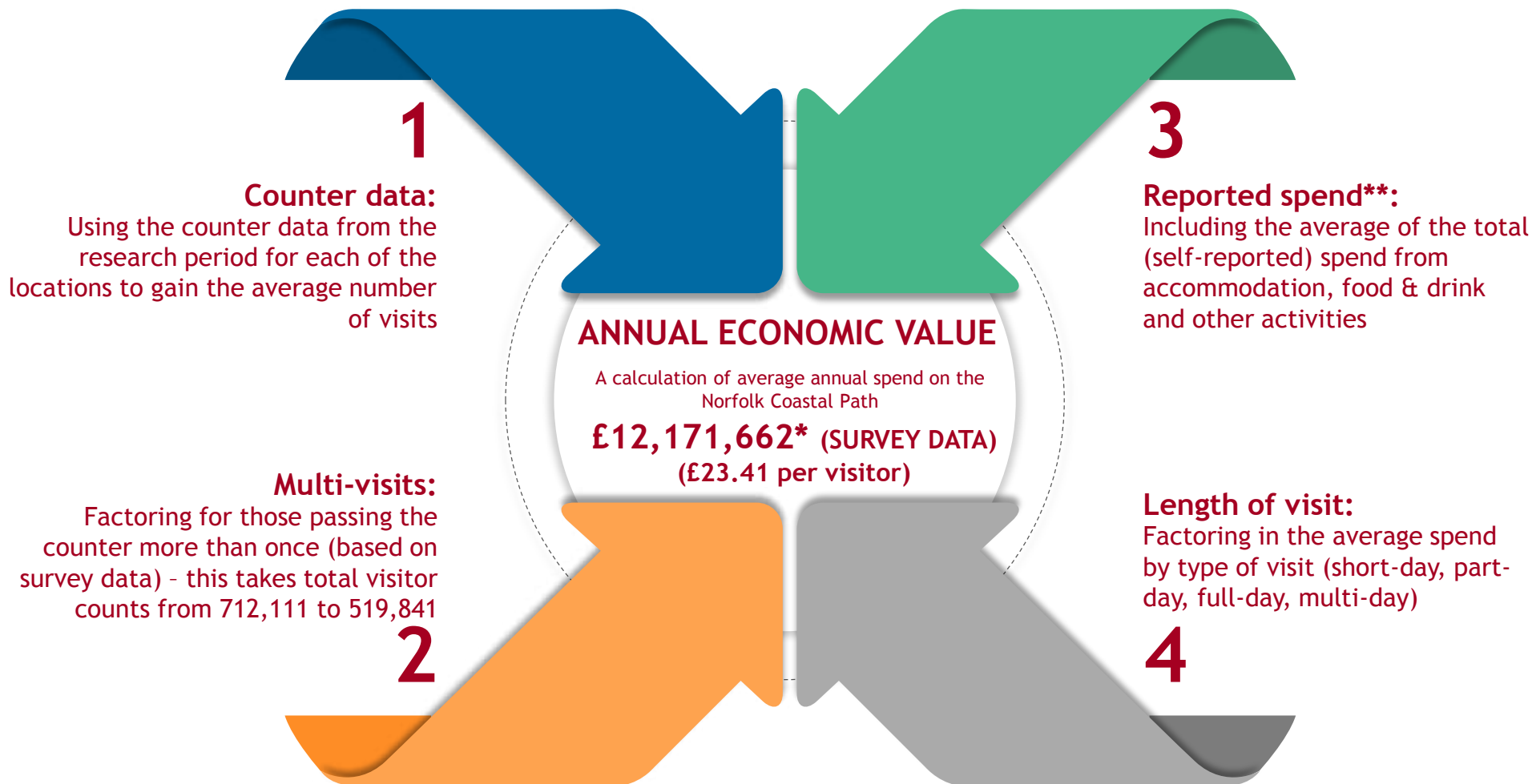
Length of trip	Accommodation	Food & drink	Other activities	Overall
SHORT VISIT	21%	29%	12%	43%
	£9.86	£5.80	£1.49	£17.15
PART VISIT	20%	44%	15%	54%
	£10.39	£8.40	£1.78	£20.57
FULL DAY	31%	68%	14%	70%
	£16.78	£13.96	£1.68	£32.42
LONG DISTANCE	66%	72%	28%	83%
	£29.13	£18.92	£5.85	£53.90



# Economic calculation



33



## Business owners - qualitative insights

*Four unstructured qualitative interviews were carried out with local businesses along the coast to provide insights about the impact of the trail from a different perspective*



## Positive impact on businesses

- The trails clearly have an impact on many businesses along the coastal path - from businesses that have reaped the benefits of increased footfall to those that have based their offering on the path itself
  - ⇒ *"You cannot underestimate the value of having a really good set of trails"*
  - ⇒ *"I saw the huge opportunity that 84 miles of coastal path had to offer"*
- The economic impact figure of the path in this report does not reflect the additional impact of the trail on businesses (nor indeed the positive impact to health) - there is also some scepticism about models that are used to measure impact on businesses, due to the idiosyncrasies of individual sites/areas
  - ⇒ *"What some bodies can't get their heads around is that the value goes way beyond the users of that trail"*
  - ⇒ *"The tourism value wouldn't be the same if we didn't have a trail on our doorstep"*
- It's also a two-way street
  - ⇒ *"We're now put more people on the path than we take off it. I'd like to see more counters, East and West of Deepdale"*



## Growing the Norfolk brand

- There is appetite for working in partnership more to grow the Norfolk brand - but help is needed to do this
  - ⇒ *"The challenge is promoting the whole of Norfolk"*
  - ⇒ *"Giving back programmes go some way to helping and enhancing the visitor experience"*
  - ⇒ *"The council isn't hugely connected with businesses. We've suggested an online portal to access imagery/maps - promoting walks & trails even more - one point of reference, PDF newsletters. It would make it easy for visitors and businesses. We're eager to help promote what they're doing - let us help!"*



## Booking trends

- ➔ It's an exciting time for Norfolk, with some key trends being:
  - ⇒ 35% increase so far in short break bookings (under 7 nights)
  - ⇒ People seemingly taking a handful of short breaks, rather than one big break
  - ⇒ People are increasingly coming at different times of the year
  - ⇒ Increased visits in 'shoulder months' - May/June/September (*"The biggest is the school holidays but we're now starting to see it spread across to non-school holiday times too"*)
  - ⇒ Increase in multi-generational holidays/groups: rentals of properties sleeping 6 are up 10% year on year and those sleeping >6 are up by 20% - but with no massive change in the portfolio of properties
  - ⇒ An increase in holidays with pet bookings - which suggests an increased likelihood of people subsequently doing walking/outdoors activities
  - ⇒ People are spending more too - booking values are going up on average



## The coast is a hotspot for investment

- ➔ Property owners are investing in the coast more than the Broads and countryside;
- ➔ Hunstanton to Sheringham/Cromer is a key area of growth. Wells is the most 'searched-for' area on the website but there is an increase on people searching for Sheringham and Cromer



## Winter doesn't have to be a detractor

- ➔ The trails can have a positive impact in the 'harder to sell' colder/winter months:
  - ⇒ *"We have to work harder at selling in the cooler months - walking and wildlife is ideally placed to do this"*



## There are opportunities for the council to engage more with businesses on the trail

- ➔ There is a perception that many businesses are unaware of the opportunities the trails can bring to their businesses, and only a handful of businesses are currently engaging with the trails partnership
  - ⇒ *"There are people who are aware... and people who are aware and shout about it"*
  - ⇒ *"We join up with local businesses e.g. yoga retreats - it means there's no cost, it's just another experience for our customers"*
  - ⇒ *"With us and Deepdale we've shown how it can work - if you sit down and talk to each other, you can achieve a mutual understanding but it takes two to make it happen"*
  - ⇒ *"People need to join forces without taking on too much work - work that is mutually beneficial"*
  - ⇒ *"On walking holidays people can enjoy the coast in a sustainable way. We promote local businesses that can provide guided walks, there's the nature shop at Deepdale, Runton Walks, Paddle Boards - we encourage people to enjoy other activities"*
  - ⇒ *"I thought National Trails were one big company until I got a bit more involved with people - had no idea Norfolk Trails was part of the council, so it's a comms issue"*
  - ⇒ *"I sometimes have an issue with number of nights when booking our walking holidays - many are two night stays over the weekend which is no use for walkers"*

## Transport



- ➔ The coastal bus service was mentioned several times as an issue
  - ⇒ *"Transport can be an issue - we need a decent bus service - between Mundesley and Caister it is non-existent - it would make such a difference"*
  - ⇒ *Travel is an issue - If you parked in Hunstanton, how do you get back from Sea Palling - from Cromer to Great Yarmouth is a black hole*



The perceived differences in sections of the trail and impact on businesses is evident:

- North Norfolk is an AONB and will always attract more interest, but the eastern seaside towns/villages are not always well-regarded and the landscape is considered less attractive
  - ⇒ *“People are sometimes quite happy to stop in Cromer than go round the east side”*
  - ⇒ *“The east coast is popular but horrible in comparison (although Winterton and Mundesley are lovely)”*
  - ⇒ *“Remote areas are not as accessible to get through and not as picturesque”*
  - ⇒ *“Mundesley is beautiful but people don’t explore the path there enough”*
  - ⇒ *“Hemsby and Great Yarmouth are not nice - full of arcades, not gentrified”*
  - ⇒ *“Problems with coastal erosion”*
  - ⇒ *“They’d have to build amazing houses and delis to have an impact”*
  - ⇒ *“There aren’t the facilities and infrastructure around the east side e.g. fewer B&Bs, ‘Reef’ and cash only in some places”*
- There are also fewer vacation properties on the east coast compared to North Norfolk
  - ⇒ *“The east coast has beautiful properties but they are harder to fill”*
- But perhaps more could be done to help mitigate some of the detractors:
  - ⇒ *“There could be a lot more promotion of the Deep History Coast”*
  - ⇒ *“Need more promotions of circular walks”*
  - ⇒ *“The beaches are nice. And the tides don’t go out as far”*
  - ⇒ *“Could brand it as the Secret Stretch - more funding with products and maps; add into next year’s Acorn Scheme”*



## How to better promote the trails

- There was consideration of promoting the trails with more walking champions who are not part of the council e.g. local celebrities such as Suzy Fowler-Watts
- ‘Experiences’ are on-trend at the moment and this works to the trail’s advantage
  - ⇒ *“Everything is about the experience these days. Norfolk’s big skies - you can totally immerse yourself and carry on the experience, get the mud between your toes. It is an exclusive and unique opportunity for us”*
  - ⇒ *“Seals! We have big reviews on the website about them”*
- Several have found they have had to embrace social media, with positive results
  - ⇒ *“Social media - it doesn’t come naturally to me but we embraced it and directed people to the website; blogging was also important”*



## Being dog-friendly is a huge benefit

- The dog-friendliness of the coastal path as an experience is a big attraction, and the number of dog-friendly places on the North Norfolk Coast is seen as beneficial
  - ⇒ *“Dog friendly is a real draw”*
- However, increased dog walking means helping to manage irresponsible owners
  - ⇒ *“Leave no trace (our business is being mindful of this but not all are)”*
  - ⇒ *“Dog friendly is great but some leave mess and disturb the birds so need help to stop that e.g. more dog bins”*

## *Summary & considerations*

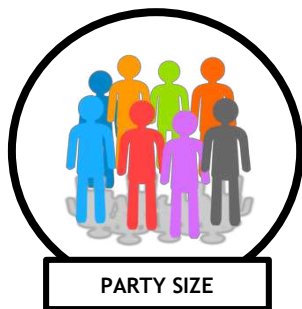




- The gender profile is broadly evenly split between males and females
- The age profile for the trails is typically aged over 35, with 36-60 being the most represented age cohort; 18-35s are the least represented
- On balance, Stretch 3 has the maturest age profile, whilst Stretches 1 & 2 are slightly more appealing for families; popular specific locations for families are Hemsby, Hopton, Horsey, Beeston and Weybourne



- Walking, and specifically dog walking, are (by far) the main activities on the trails
- Dog walking is particularly popular in Winterton
- However, the range of activities on the trails is wide-ranging, with nature featuring strongly (particularly birds and seals) but also creative, educational, conservational and religious pursuits (e.g. painting, courses, litter picking, pilgrimages)



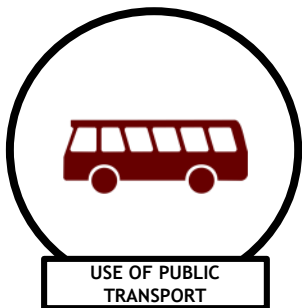
- There are large differences in party size by location
- Stretch 2 has a higher proportion of 3+ party sizes, with Horsey, Hemsby, Beeston, Blakeney, Gorleston and Hopton having the largest party sizes
- Holme is significantly more likely to have party size of 1 (most likely to be bird watchers)



- Large differences in 'return' behaviour by location, with Stretch 1 being significantly more likely to only have visitors passing only once;
- Visitors to Winterton, Blakeney & Burnham Overy are much more likely to pass the counter twice, whilst Trimingham, Holkham, Weybourne and Overstrand visitors are most likely to pass the counter only once



- Stretch 2 attracts visitors for shorter periods overall (particularly Winterton, Horsey & Gorleston); longer trips are evident at Holme, Brancaster, Beeston, Trimingham, Hemsby and Hopton
- Understandably, length of visit increases in the summer, with 1 in 4 staying a full day or overnight (compared to around 1 in 6 in Spring and Autumn and 1 in 10 in Winter)



- Around 1 in 10 use public transport along Stretches 1 & 3 but this rises to nearly 1 in 5 along Stretch 2
- Use of public transport is highest amongst visitors to Trimingham, Beeston and Hemsby;
- Use of public transport increases as length of stay increases



- Significant differences by stretch in terms of repeat visiting - Stretch 3 has significantly more repeat visitors than Stretch 1, which has significantly more repeat visitors than Stretch 2 (although Winterton is 100% repeat visitors)
- The trails are very much enjoyed by visitors and there is a strong inclination to return; even for those who don't intend to return, the majority say they would recommend the trail, indicating that it isn't enjoyment of the trail that reduces intent to re-visit
- However, a notable proportion say they wouldn't recommend the trails at Winterton, Hopton and Gorleston



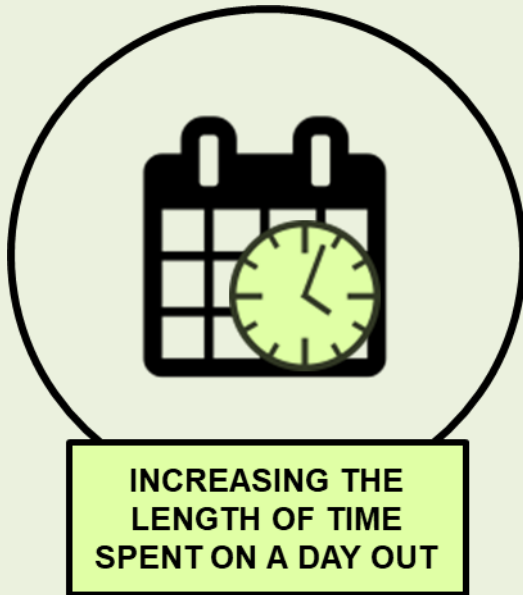
- Use of websites to find out information about the route varies widely for the different trails, being much higher for Burnham Overy, Happisburgh, Overstrand, Trimmingham and Horsey
- Use of websites increases as length of stay increases
- Ages 18-35 are significantly more likely to search for information about the trails via websites than other age groups
- Websites most likely to be used for information are Norfolk County Council (by far), Google (& Google Maps), Norfolk Trails, (Friends of) Horsey Seals/Horsey Gap, National Trails and National Trust



- The vast majority of visitors intentionally visited the trail, although Stretch 2 and particularly Waxham stands out, with many people saying they were visiting the beach rather than the trail
- As age and length of stay increases so does 'intentional visiting' i.e. they have specifically come to visit that trail
- Locally, NR13, NR12 and NR31 are the key feeder postcodes for visiting the trail;
- From outside NR postcodes, visitors are most likely to travel to the trail from IP and PE postcodes; LE, CB and SS postcodes also feature strongly



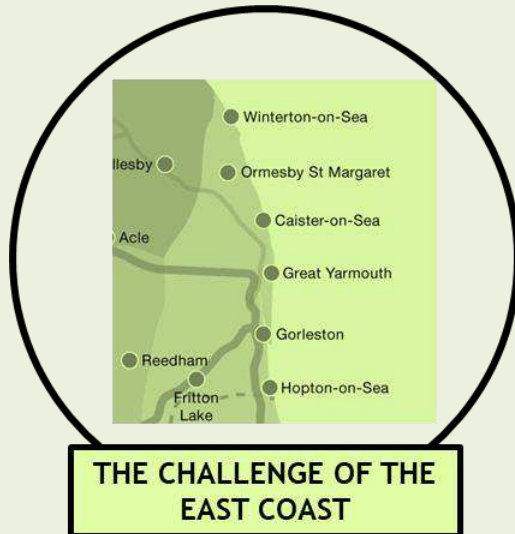
- The age profile for the trails is typically aged over 35, with 36-60 being the most represented age cohort; 18-35s are the least represented. There is no significant gender bias and party size is most likely to be 2
- It is also important to note differences by stretches and individual sites e.g. Stretch 2 (generally), Hemsby, Horsey, Hopton, Beeston and Weybourne all have a higher proportion of larger group sizes and under 18s (i.e. families)
- Whilst this is not new information, it is important to remember when communicating about the trails in terms of content (tone of voice, images used, calls to action, competitions)



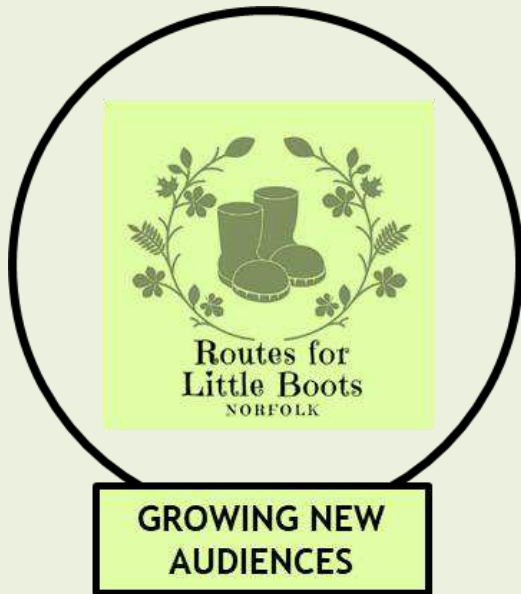
- ➔ Length of visit varies widely by stretch, site and season; it is also clearly evident the impact longer stays have on visitor spend (particularly overnight stays)
- ➔ Norfolk Trails is only one cog in the wheel of **growing the Norfolk brand** and consideration might be given to:
  1. Continuing to help facilitate partnerships between local businesses e.g. keep encouraging organisations to attend partnership meetings, show how it can be mutually beneficial (case studies?)
  2. Consider how to help and inspire visitors e.g. adding more information to communications about walks by @mentioning pubs, eateries, activities, local attractions, events that might be of interest, do shout outs, mini itineraries and mini blogs about businesses on the trails. Consider what your target audience like to do e.g. people love a pub walk
  3. Consider an online portal for visitors and businesses to access information (e.g. access to imagery/maps/PDF newsletters - promoting walks and trails even more)



- 'Norfolk Trails' is heavily eclipsed by 'Norfolk County Council' in terms of referenced websites and **there is opportunity to grow the brand's presence**
- The council's walking pages are not currently branded as Norfolk Trails and **having a dedicated, branded website may present opportunities for the brand and enable clearer communication to users/potential users, such as the vision, aims, objectives, activities and initiatives, rather than simply being a list of walks (although these would still be great to include!)**



- North Norfolk AONB (Stretch 3) has so much to offer: it has a significantly higher proportion of repeat visitors (rather than first-time visitors) and average spend is higher per person - yet the further round the coast travelled, the less the average spend, the higher proportion of first-time visitors and proportion of 'incidental' visitors to the trail
- **BUT Stretch 2 has the highest proportion of families. Can this be turned into a positive? What else can be done to embrace families along this stretch? What partnerships with local businesses? E.g.**
  - ⇒ Access-tested, short circular walks for tots near
  - ⇒ Munzee trails/Treasure Trail style walks
  - ⇒ Geocaching
  - ⇒ Den-building hotspots
  - ⇒ Activities along the trails to create adventures e.g. brass rubbings, sculpture trails
  - ⇒ Circular family pub walks (with play areas?)
- With potentially minimal effort (e.g. adding and carefully developing a family section on the website), the east can really 'own' the space of being an adventure hotspot for children & families



- The core age profile for the coastal path is ages 35+; However, consideration might be given to **new/different/growing audiences with different needs i.e. families**
- The increase in the number of ‘Access tested’ walks is a positive step and building on this in future months/years would be a positive step to ensure the needs of different audiences are catered for
- Things to consider for families:
  - ⇒ Is the walk accessible for a pushchair (are there any styles? Are gates/kissing gates wide enough?)
  - ⇒ Surfaces - are they hard or soft? Affected by the weather? Bumpy or smooth? Pushchair friendly or pushchair tolerable, or neither?
  - ⇒ Length - how long is the walk? People with toddlers will potentially be after shorter walks than those with a pushchair
  - ⇒ Parking - is there a car park, how easy is it to park and how much does it cost?
  - ⇒ Seating - are there any rest stops for breastfeeding?
  - ⇒ Facilities - is there a food or drink establishment nearby, does it have toilets and, specifically, baby change facilities? Is there a play area? Anything extra that is child-friendly?
- Finding this information via the council is currently challenging! Yet there is appetite for it amongst families





- Being dog-friendly is a huge benefit for the coastal path
- However, increased popularity comes with increased irresponsible behaviour by some e.g. dog fouling - and work is needed with partner organisations to help mitigate this
- Continued communication about health threats to dogs along the coast is also important - with such a high proportion of visitors being dog walkers, the recent threats to dog safety are likely to have deterred many people from visiting

# Considerations

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## Stretch 3 (Hunstanton up to Weybourne)

- Average spend is highest @ Stretch 3 (Hunstanton to Weybourne)

## Stretch 2 (Sea Palling to Hopton)

- ...and lowest @ Stretch 2 (Sea Palling to Hopton)



- Summer and Autumn have significantly higher average spend levels (and Autumn is as important as Summer)



- Ages 36-60 are the highest spenders



- The longer people visit the trail for, inevitably they will spend more money - keeping people on the trail longer should be a key objective



- HOWEVER, economic calculations are only part of the picture - a lot of the value of the path cannot be quantified and the value goes beyond what people are spending e.g. physical & mental health benefits, knock-on effects to businesses, entire livelihoods depending on it and general wellbeing

## STRENGTHS

- Trails are highly enjoyable
- Propensity to return/recommend is high
- North Norfolk AONB
- 'Experiential'
- Dog-friendly
- Lots to offer
- Positive impact on local businesses

## OPPORTUNITIES

- Encouraging/facilitating greater business connections
- Helping grow the Norfolk Brand
- Supporting any public transport initiatives for the east side
- Targeting areas with large party sizes to make them family-friendly e.g. short circular walks with kids activities near Hemsby, Beeston, Hopton and including activities
- Keeping people on the trail for longer/encouraging overnight stays (increases spend)
- Greater promotion of Deep History Coast
- Stretching out the influx of seal visitors further e.g. to Waxham and Winterton

## WEAKNESSES

- Information on accessible pathways not always easy to find online
- Some visitors on the east coast are not aware they are walking on the coastal path
- The main draw is North Norfolk - some areas on the east coast are seen as much less appealing

## THREATS

- Infrastructure poor on east coast
- Public transport a hindrance to one-way walking on the path
  - Continued threat of coastal erosion
  - Increased popularity comes with increased irresponsible behavior by some e.g. towards wildlife, littering, wild camping debris and dog fouling - work needed with partner organisations to mitigate this
- Recent issues regarding dog deaths on beaches

