TOURISM BENEFIT & IMPACTS ANALYSIS
IN THE NORFOLK COAST AREA OF OUTSTANDING NATURAL BEAUTY

APPENDICES

May 2006

A Report for the Norfolk Coast Partnership Prepared by Scott Wilson

NORFOLK COAST PARTNERSHIP

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1 A1 - Norfolk Coast Management

1.1 A key aspect of the Norfolk Coast is the array of authority, management and access organisations that actively participate, through one means or another, in the use and maintenance of the Norfolk Coast AONB, particularly its more fragile sites.

1.2 The aim of the following section is to summarise some of the key aspirations of the administrative, statutory, access and conservation management organisations in relation to tourism and visitors, and specifically in relation to their interests along the Norfolk Coast. Phase II of this study highlights some of the key concerns and aspirations of local parishes, businesses and community groups.

Administrative Organisations

1.3 The administrative organisations of North Norfolk District Council, the Borough of King's Lynn and West Norfolk, and Great Yarmouth Borough Council all include specific acknowledgement of the sensitivities of the Norfolk Coast AONB.

1.4 In relation to tourism, this recognition is noted within:

- A recent North Norfolk Tourism Sector Study (2005). This study recognises the different role the AONB has in relation to its core characteristics, with the area surrounding the resorts of Cromer, Sheringham, and Mundesley providing a natural greenscape and dramatic coastal headlands. The primary draw is the beaches within the resorts themselves; whilst the area to the west of Sheringham, defined as the 'Heritage Coast', acts as a primary resource for pulling in visitors either for the opportunities for rest and relaxation in a highly desirable and attractive landscape, or through its opportunities for discovering wildlife and nature. Ultimately, the report suggests that the vision for tourism within North Norfolk is to 'Develop a tourism sector that is synonymous with offering a quality experience to all visitors; has an emphasis on organic growth utilising current capacity; and seeks to maximise the value of tourism both in terms of generating additional visitor spend, and strengthening linkages between local businesses'.

- The Borough of King's Lynn & West Norfolk Tourism Development and Management Strategy (2005). The main vision of the strategy is 'To support the sustainable development of tourism in West Norfolk through priorities and actions which add to the economic, social and environmental well-being of the Borough'. In particular, the strategy highlights that the Borough's key tourism assets lie within its landscape and natural attractions, with the Norfolk Coast AONB and its entire coastal zone being a European Marine Site (EMS) and a core focus for visitor activity. The key principles of the strategy, therefore, are to:

  - ensure that development of services and facilities can provide long term, sustainable employment and income opportunities (Policy 4);

  - ensure marketing, development and visitor management are appropriate to the environment (Policy 5); and

  - work to support an increase in alternative and integrated transport options within West Norfolk (Policy 6).

Other Statutory Organisations

Working for the Countryside: A Strategy for Rural Tourism in England 2001 – 2005: Countryside Agency & English Tourism Council

1.5 'Working for the Countryside' is a joint strategy for tourism published by the Countryside Agency and English Tourism Council. The strategy provides a framework for action and highlights the need for a common approach to revitalising and sustaining rural tourism.

1.6 The strategy highlights 16 priority areas:

- Influencing and enabling visits:
  - Strengthening the marketing of rural products and destinations.
  - Increasing the local impact of visitor information.
  - Improving access for all.
- Enriching the rural tourism experience:
  - Providing a wide range of quality accommodation.
  - Bringing out the local distinctiveness, culture and heritage.
  - Making more of activity-based tourism.
- Fostering rural tourism enterprises:
  - Providing more focussed business support.
  - Relating planning decisions to economic, social and environmental benefits.
  - Increased networking between rural tourism businesses.
  - Improving the impact of businesses on the local environment and community.
- Improving the management of rural destinations:
  - Identifying rural tourism destinations for integrated quality management.
  - Strengthening the role of market towns in tourism.
  - Improving visitor and traffic management.
  - Supporting the conservation of landscapes and biodiversity.
  - Involving local communities in tourism management.

Tourism and Sustainable Land Management: Countryside Agency

1.7 In 2003, the Countryside Agency investigated in more detail the relationship between tourism and sustainable land management.

1.8 The report highlighted that rural landholdings relate to tourism in the following three ways:

- The provision of tourism facilities, which provides a direct interface between visitors and land managers, including accommodation provision, developing attractions, and through farm shops. Previous research estimates that between 15% and 20% of farms in England have some form of income generating tourism enterprise as part of its operations.

- The provision of food and other products purchased by tourists, though, is often an indirect purchase. Expenditure on food and drink generally accounts for 46% of visitors spending in the countryside, with two-thirds of holiday makers suggesting that they are prepared to pay more for quality food and drink, and over one-third knowingly purchase local foods whilst on holiday.

- The maintenance of attractive landscapes and access, as the main reason behind many visits to the countryside is to enjoy rural landscapes and environments. This in turn supports many thousands of jobs in areas that have little means of other employment opportunities. However, the benefit of opening access from a landowner's perspective is limited, and therefore can be a source of conflict between managers and visitors.

1.9 The report also highlights a number of initiatives that have been undertaken to improve the relationship between land management and visitors, including:

- tourists being encouraged to visit and make purchases directly from landholdings;

- visits to local markets, farmers' markets and specialist retailers;

- visits to local production plants, i.e. cheese or cider makers, or craft workshops;

- the purchase by tourism enterprises of produce which may then be specially featured, e.g. on menus;

- strengthening the identity and promotion of destinations based on environmental images and messages;

- increasing visitor awareness of conservation and land management issues through interpretation;

- developing and promoting more public access, such as circular walks on private land, integrated with support for land management initiatives;

- establishing income opportunities for land managers, such as car parking and events; and

- developing 'visitor payback' schemes to increase funding from visitors and channel it directly towards sustainable land management initiatives.

English Nature

1.10 English Nature, as well as being a statutory organisation, manages a total of three Reserves within the Norfolk Coast AONB, namely Holkham, Scolt Head, and Winterton Dunes.

1.11 English Nature is currently under-going organisational changes, with English Nature, the environmental activities of the Rural Development Service and The Countryside Agency (Landscape, Access and Recreation Division) to unite as one single body in 2006 called Natural England. This body will be responsible for enhancing biodiversity, landscapes and wildlife in rural, coastal and marine areas; promoting access, recreation and public well-being; and contributing to the way natural resources are managed.

1.12 The specific policies and objectives of Natural England have yet to be finalised. However, it will have the powers of existing bodies including awarding grants; giving advice and information;

designating SSSIs, National Parks and AONBs; managing National Nature Reserves, and enforcing the associated regulations.

1.13 Given this context, it is likely that some or all of the current aims and ambitions of English Nature will remain. In relation to recreational access and tourism, this includes:

- helping the tourism industry to protect and improve the environment;
- developing ‘green tourism’ through a managed approach to using wildlife sites;
- providing opportunities to bring people and nature closer together;
- continuing their management of NNRs to combine access, recreation and nature conservation;
- continue their policy of open access on NNRs, welcoming people for quiet recreation which respects the places where wildlife, geology and the landscape come first;
- encourage people to control their dogs on sites where there are vulnerable features;
- look for opportunities to develop and promote environmentally friendly forms of transport and ways of reaching the countryside; and
- develop partnerships and support for the local community and volunteering activities that help people understand and enjoy nature.

1.14 English Nature’s role in the Norfolk Coast is through the management of:

- Holkham Reserve, by far the largest covering some 10,000 acres, and is thus recorded as being the most extensive, diverse and dramatic Reserve on the coast. Holkham includes vast stretches of sandy beach and sand dunes, shady pinewoods, green pastures and marshes which provides a unique mix of opportunities for casual recreation and learning about local nature and wildlife. This site is easily accessible from Wells-next-the-Sea, and the Lady Anne Drive car park opposite Holkham Hall. As a result, it is loosely estimated that the Reserve receives between 750,000-1 million visitors per annum.
- Scolt Head is said to be a prime example of an offshore barrier island. The Reserve is difficult to access by the public, which combined with the management policy of non-intervention means that the Reserve has established itself as an important research resource.
- Winterton Dunes, which is a unique and extensive dune system, receives relatively few visitors, with an estimated 12,000 visitors entering through Horsey Windpump. Other access is via the car park adjacent to the town of Winterton-on-Sea.

Access & Management Organisations

Norfolk Coast Partnership

Norfolk Coast Management Plan 2004-2009

1.15 The Norfolk Coast Partnership is working within an agreed Management Plan, which covers the period 2004-2009. The Plan includes key policies and priorities in order to focus activity, and lead in the development of programmes towards specific management requirements.

1.16 The key policies of the plan broadly cover:

- communicating the importance of the AONB to both statutory and non-statutory organisations that have an influence on its future protection through the management plan, sharing its aims, vision and agreed guidance;

- involving a wide range of partners and stakeholders, especially local communities, in the development and implementation of specific plans and initiatives;

- seeking existing streams of funding and grant sources, and where necessary to acquire new funding, to support the Plan and subsequent initiatives; and

- supporting the local economy, promoting the local sourcing of employees, services or products and linkages between business; and supporting livelihoods and traditions that help maintain the character of the AONB.

1.17 In conjunction with local people and organisations, the Partnership has established a shared vision in order to address particular challenges facing the AONB. Tourism and the visitor sector are covered within the ***'Access, Recreation and Enjoying Natural Beauty'*** section. The Management Plan states that whilst the provision of outdoor recreation is not a formal purpose of the AONB's designation, the Norfolk Coast AONB is recognised as a local, regional and national recreational resource for people to visit, use and enjoy. In addition, the Plan suggests that the more people who enjoy, understand and appreciate the area, the more likely they are to support the management needed to maintain its character. The Plan recognises the growing influences that visitors and visitor behaviour is having on the AONB, and that a small level of inappropriate activities in sensitive areas can in fact have greater impact than large volumes of visitors in more robust areas. As a result, the main objectives identified include; developing systems to manage visitor pressure on habitats; improve the understanding of the sustainable recreational use of the AONB; and to improve facilities and information for the disabled.

Norfolk Coast Partnership Visitor Management Plan - 1995

1.18 In terms of visitor impacts, characteristics and behaviours, the current Norfolk Coast AONB Management Plan refers to the key principles included within the Visitor Management Strategy published by the Partnership in 1995. The main principles behind the strategy still remain today, and include:

- developing a management process aimed at harnessing the benefits of tourism to the local economy and in maintaining employment opportunities, whilst easing the pressures that visitors bring to the AONB and its community;

- raising awareness amongst the community, business and visitors of the role they play in overcoming pressures;

- encouraging the exploration of the AONB by more sustainable means, such as public transport, walking, cycling and horse riding; and

- developing initiatives to allow for more considered interaction and observation of the unique characteristics of the AONB, particularly its wildlife.

1.19 A key outcome of the Visitor Management Strategy was a management-zoning system, whereby the AONB was divided into zones according to varying degrees of environment/habitat sensitivity and visitor pressures, and therefore being defined as one of six different visitor management priorities (see map 5.1 in the main report):

- **Red Zone** – Holme Dunes, Holkham Dunes, Blakeney Point and Winterton Dunes. These are defined as the most fragile wildlife habitats in the AONB, and yet are under considerable visitor pressure. Within these areas, the strategy denotes a strict management technique of not promoting to visitors, and the reduction of parking.

- **Dark Orange Zone** – Coastal stretches of the East and West AONB outliers; Dersingham Bog SSSI and Kelling Heath SSSI; and the majority of the Heritage Coast between Holme and Weybourne These still contain fragile habitats, but are regarded as slightly less susceptible to visitor pressures. Again within this zone, the Visitor Management Strategy denotes that the potential for visitor activity will not be promoted, although any attention that is received is to be redirected to the Hatched Orange Zone.

- **Hatched Orange Zone** – This zone includes selected Nature Reserves and rural beaches. This zone denotes that, although sensitive to visitor use, these areas are better able to absorb visitors. The purpose of these areas in terms of visitors is to draw usage away from both the Red and the Orange zones, although the emphasis is on the pursuit of activities that compliment the nature conservation characteristics.

- **Light Orange Zone** – This includes most of the Eastern Outlier and the Western AONB outlier that borders the Dark Orange Zone. This is an intermediate area with visually sensitive open landscapes, but lying adjacent to fragile wildlife habitats. These areas are carefully promoted, but also managed to ensure that activity does not spill over into more sensitive locations.

- **Light Green Zone** – Largely this zone is between Ringstead and Holt bordering the Light Orange Zone and the south AONB boundary. This is a more robust area within the AONB, with its sensitivity level mainly due to its proximity to the Heritage Coast. As such, the area is to be promoted for its soft recreational activities (walking, cycling, horse-riding, etc) to draw attention away from the more sensitive coastal areas.

- **Dark Green Zone** – The Dark Green Zone covers the majority of the hinterland areas, including the area between Holt/Upper Sheringham and Paston (just to the east of Mundesley), between Ringstead and Snettisham, and the majority of the Western Outlier. This zone denotes the most robust areas, and is highlighted as a priority for visitor activity. Yet the majority of this area has fewer visitor pressures.

Norfolk Coast Transport Strategy

1.20 Norfolk County Council act as the highways authority charged with the management of the road network within the Norfolk Coast AONB.

1.21 As part of its responsibilities, the Council, in conjunction with the Norfolk Coast Partnership, produced the Norfolk Coast Transport Strategy in 1998. The key targets within this strategy include:

- a completed Quiet Lanes network for the AONB by 2004 (A Norfolk Coast speed control zone, and Norfolk Coast Quiet Lanes, established as successful tourism marketing devices);

- the completion of traffic management for all villages where necessary within the AONB by 2010;

- a 10% fall in the peak (August) level of private car traffic along the Coast Road (A149 - Hunstanton to Sheringham) between 1997 and 2010. This is to be achieved without a decline in visitor numbers; and

- the achievement of commercial (unsubsidised) operation of a Coastliner and new AONB park & ride services.

Achievements

- A quiet country lanes scheme that currently exists within North Norfolk occupies a triangle of routes between Cromer, Bacton and North Walsham, covering some 36 miles altogether inclusive of a small section of the AONB. The designated Quiet Lanes have specific signposting upon entry and exit.

- The Coastal Hopper has been in operation since 2000. The patronage of the service has increased annually since its introduction, and in 2004/5 stood at just over 91,000. This compares to just 38,000 in 2000/1. In 2005/6, the service is on target to receive over 100,000 users. Whilst there is no specific evidence on the types of users and how they use the service, the usage figures show its peak as July to September (38% of use), coinciding with the peak visitor season; and at its lowest use period being January to March (16%). This suggests a high level of use by visitors to the area, supported by anecdotal evidence from the operator. Tourists do use the service for 'hopping' from one stop to another, a primary design of the service combined with the multiple journey ticket.

- The Partnership, through the stated aims and ambitions of the Norfolk Coast Transport Strategy have been successful in securing several cycle and walking routes including the Peddars Way and Norfolk Coast Path.

Norfolk Wildlife Trust

1.22 The Norfolk Wildlife Trust (NWT) is a charitable organisation with the purpose of working towards:

- the effective protection and enhancement of wildlife and wild places throughout Norfolk, and

- encouraging people of all ages and backgrounds to enjoy our natural heritage.

1.23 Norfolk Wildlife Trust works collaboratively with the consultancy arms of Suffolk and Essex Wildlife Trusts to provide regional (East of England) coverage.

1.24 The Trust manages a total of 30 Nature Reserves within Norfolk, including Reserves at Salthouse Marsh, Cley Marsh, Holme Dunes and Ringstead Downs within the Norfolk Coast AONB.

1.25 The conservation priorities of NWT, which spans all of its Nature Reserves, are to:

- seek large scale habitat creation;

- push for better wildlife management on County Wildlife Sites;

- ensure proper use of water resources to sustain Norfolk's wetlands; and

- play a role in the planning system to protect wildlife sites from inappropriate development.

1.26 A key concern of the NWT is that inappropriate care for, and neglect of, Norfolk's relatively small and isolated wildlife enclaves could have a significant negative effect on the county's natural heritage. As such, a key aspect of the NWT's conservation work revolves around the championing of wildlife where it is threatened. Targeting specific areas their practices can make positive contributions.

1.27 In relation to the Reserves in the Norfolk Coast AONB, the NWT is actively seeking better visitor management of its Reserves, particularly at Holme and Cley, which are considered to be the most vulnerable to visitor pressures.

1.28 Both Holme and Cley Reserves include visitor centres, which are generally open from April to October. The centre at Cley is to be re-developed in the near future, with the new centre to offer greater opportunities for learning particularly aimed at schools. The car park will also be extended, and the site will include a café.

The National Trust

1.29 The National Trust owns and manages the majority of the 1,097 hectares of the Blakeney National Nature Reserve. This includes Blakeney Point, Blakeney Freshes, Morston and Stiffkey Marshes. The Trust also manages the Brancaster Reserve, which includes a residential activity centre.

1.30 The National Trust is reputedly Europe's leading conservation charity, with 3.4 million members. In terms of Blakeney, Brancaster and other coastal environments that it manages throughout the UK, they will be subject to the Trust's Coastal Policy document.

1.31 Ultimately, the Trust wishes the policies to provide a framework that enables decisions to be made at a local level. The key emphasis of the policies is based on the sustainable management of coastal habitats in light of serious changes and challenges, including coastal erosion and accretion, the processes of coastal change, the threat of sea-level rises, social and economic development pressures.

1.32 Included within these policy statements is one regarding public access, namely that:

'The Trust will actively promote public access to the coast, subject to conservation and safety consideration, in order to provide public enjoyment, recreational opportunities, and to develop understanding of the coast'.

1.33 In relation to the Blakeney Reserve, the Trust feel that it has a public access role whereby it tries to encourage sustainable interaction with visitors and local tour companies. The Reserve is estimated to receive nearly 100,000 vehicles, which park at Blakeney and Morston Quay. National Trust members account for approximately two-thirds (c.60%) of visits, with the car park free to members.

RSPB

1.34 The RSPB own and manage the Reserve at Titchwell. This Reserve is very much orientated to welcoming visitors with a café, a successful shop, interpretation boards and all weather boardwalks leading to the bird watching hides.

1.35 The RSPB, as an organisation, is heavily involved in the conservation and protection of wildlife, but also in promoting the role and value of wildlife in its widest sense. This includes, for instance, the completion of the 'Valuing the Norfolk Coast' study in 1999 (see Section 6 in the main report for a summary).

1.36 According to the management team, Titchwell Reserve has a capacity of 125,000 visitors per annum. On average, it receives just short of this capacity, although one year it did receive around 135,000 visitors, which reputedly stretched on-site resources.

1.37 The car park, which has room for 115 cars, is considered to be the natural barrier to visitor numbers exceeding capacity on any given day. Once the car park is full, visitors are forced to consider moving to another area, with the only way to access the site, even if the primary purpose is for the beach/casual bather, being through the car park and the Visitor Centre.

Non-statutory Organisations

East of England Tourist Board

1.38 The East of England Tourist Board (EETB) is a sister company of East of England Development Agency, and acts as a delivery partner to the Tourism sector.

1.39 In 2000, the EETB published its 2000-2010 tourism strategy for developing tourism in the East of England. The strategy denoted that tourism in the East of England is characterised by:

- domestic tourism, which remains considerably more significant than overseas visits though growth in overseas visits is stronger;
- long holidays, but whose share is declining and being replaced by short breaks;
- holiday tourism, particularly along the coastal areas of the Region;
- long coastlines, significant areas of waterway's, a wealth of historic cities, market towns and villages, and a variety of seaside resorts which combine to provide the main visitor assets and appeal; and
- a sense of peace, tranquilly and a slower pace of life.

1.40 Key weaknesses identified include:

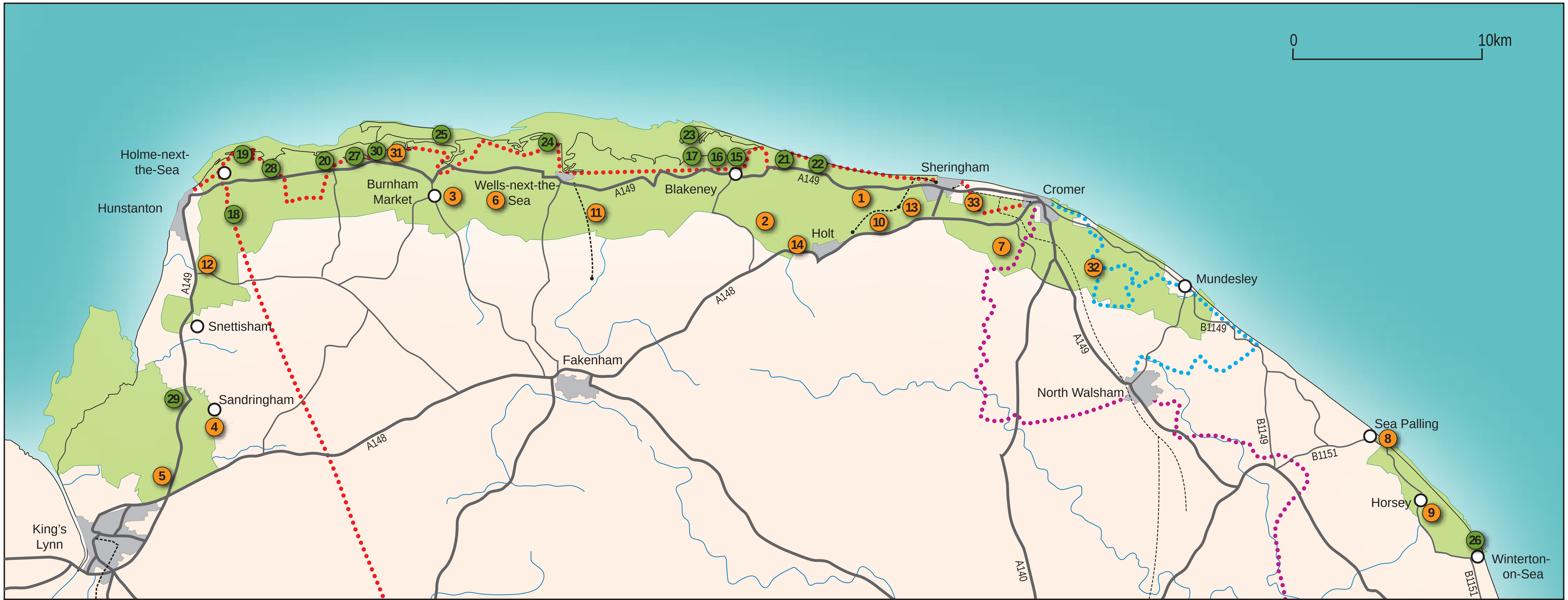
- a lack of a strong positive regional identity;
- a perception of un-dramatic natural attractions and scenery;
- high levels of congestion, poor public transport and poor visitor management; and
- a perception of remoteness in travelling terms.

1.41 The strategy highlighted that the vision for tourism should be to achieve:

- the perception of the East of England as the best Region in England;
- continuous growth in profitability for tourism businesses;
- loyal, satisfied customers;
- satisfied staff in fulfilling jobs;
- well-managed and maintained tourism sites;
- tourism in greater harmony with residents and surroundings;
- greater investment in tourism by government and other public bodies; and
- a general recognition of the importance and value of tourism.

1.42 The strategy is based upon five key principles.

- Partnership – to promote positive partnerships with clear purposes focused on action and achievement and designed to make the most effective use of available resources.
- Quality – to provide a high-quality visitor experience that meets or exceeds customer expectations.
- Sustainability – to protect, manage, and enhance the natural, built and human context of tourism in the East of England, making better use of regionally distinctive features.



Norfolk Coast AONB Attractions

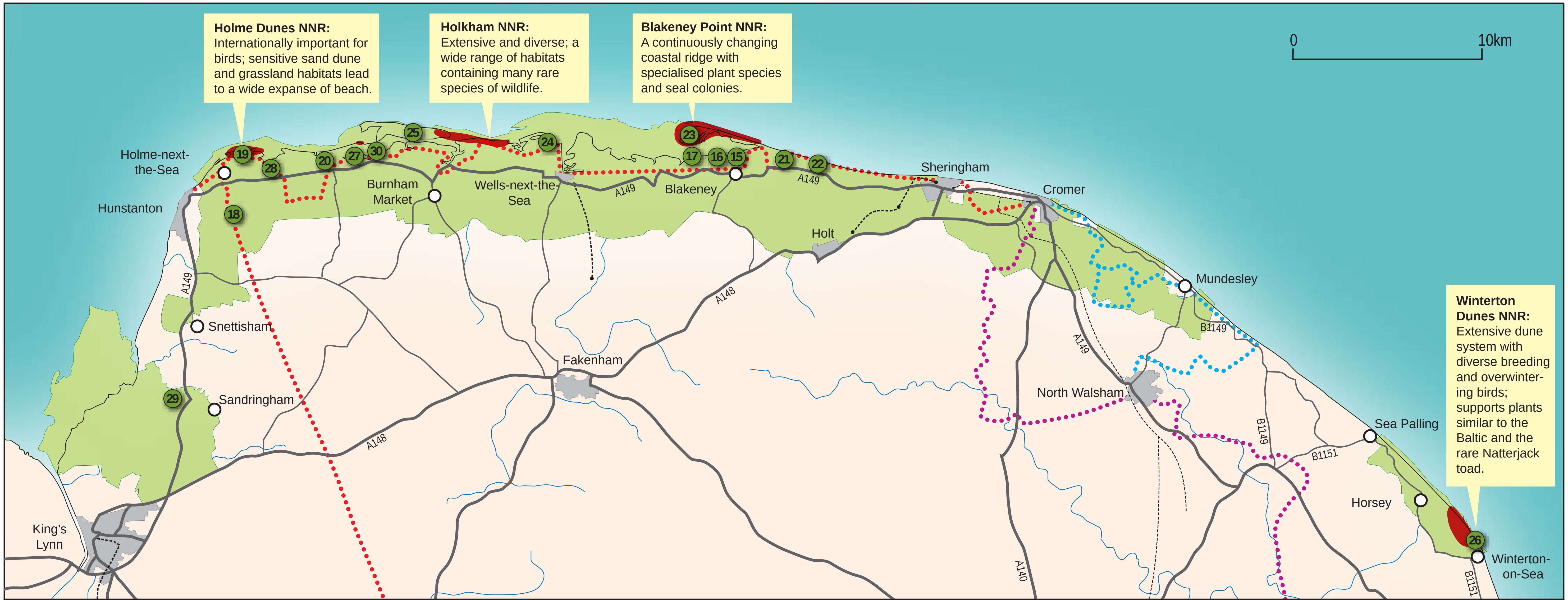
1. Muckleburgh Collection
2. Glandford Shell Museum
3. The Saltwater Gallery
4. Sandringham House, Museum and Gardens
5. Castle Rising Castle
6. Holkham Hall, Estate, Bygones Museum & Park
7. Felbrigg Hall & Park
8. Waxham Barn
9. Horsey Windpump
10. North Norfolk Railway - The Poppy Line
11. Wells and Walsingham Light Railway
12. Norfolk Lavender
13. Sheringham Park & Visitor Centre
14. Letheringsett Watermill
15. Bishop's Boat Seal Trip
16. Beans Seal Trip
17. Temples Seal Trips
18. Ringstead Downs Nature Reserve
19. Holme Dunes NNR & Visitor Centre
20. Titchwell Marsh Nature Reserve & Visitor Centre
21. Cley Marshes Nature Reserve & Visitor Centre
22. Salthouse Marshes Nature Reserve
23. Blakeney Point NNR
24. Holkham NNR
25. Scolt Head Island NNR
26. Winterton Dunes NNR
27. Brancaster Staithe Nature Reserve
28. Holme Bird Observatory Reserve & Visitors Centre
29. Dersingham Bog NNR
30. Norfolk Fishing Trips and Charter
31. Northshore Sport and Leisure / SailCraft Sea School
32. Bittern Line
33. Norfolk Shire Horse Centre

Peddars Way & Norfolk Coast Path
Weavers' Way
Paston Way
Railway Lines

Nature Based Attractions
All Other Attractions

Map 2.1

Distribution of All Attractions in the Norfolk Coast AONB



Norfolk Coast AONB Attractions

- 15 Bishop's Boat Seal Trip
- 16 Beans Seal Trip
- 17 Temples Seal Trips
- 18 Ringstead Downs Nature Reserve
- 19 Holme Dunes NNR & Visitor Centre
- 20 Titchwell Marsh Nature Reserve & Visitor Centre
- 21 Cley Marshes Nature Reserve & Visitor Centre
- 22 Salthouse Marshes Nature Reserve
- 23 Blakeney Point NNR
- 24 Holkham NNR
- 25 Scolt Head Island NNR
- 26 Winterton Dunes NNR
- 27 Brancaster Staithe Nature Reserve
- 28 Holme Bird Observatory Reserve & Visitors Centre
- 29 Dersingham Bog NNR
- 30 Norfolk Fishing Trips and Charter

Peddars Way & Norfolk Coast Path
Weavers' Way
Paston Way
Railway Lines

Area of Sensitivity

Map 2.2

Nature Reserves & Sensitivities

- Competitiveness – to promote the competitiveness of the industry in the East of England by increasing customer demand and supporting businesses through informed, co-ordinated and focused action.

- Accessibility and inclusion – to reduce barriers and widen access to tourism for all kinds of visitors.

1.43 Many of the key actions have relevance to the development of tourism within the Norfolk Coast AONB, but those which have a specific resonance include:

Obj 1.4 – To encourage the development of tourism partnerships, particularly with regards to marketing, planning and project delivery.

Obj 2.2 – To support and develop people working in the tourism industry, with the EETB looking to develop innovative training opportunities based on the specific requirements of tourism businesses.

Obj 3.1 – To protect and enhance the region's natural and built environment, particularly through land-use planning systems and developing an effective dialogue with planners and key stakeholders.

Obj 3.3 – To regenerate and revitalise seaside resorts, through accessing funding opportunities through public-private partnerships, and concentrating on enhancing the quality of the seafront areas and architecture.

Obj 3.7 – To enhance tourism-host community relationships, by involving community members in decision-making and to encourage community-led tourism initiatives.

Obj 4.1 – To improve perceptions and raise awareness of the region through the creative use of media and PR.

Obj 4.4 – To develop appropriate products and themes, and in particular concentrating on those which already exist.

Campaign for the Protection of Rural England (CPRE)

1.44 The CPRE are concerned with the impacts that housing, industrial and road improvements are having on the countryside. Specific concerns include the blurring of the distinction between town and country; uniform developments eroding local distinctiveness; and run-down urban centres encouraging people to flee to the countryside, spurring ever-greater pressure for development.

1.45 As a result, the CPRE are heavily involved in trying to use planning for the protection of England's countryside and enabling change for the better, with their policies enshrined in the following.

- Planning that results in urban renewal, not suburban sprawl.

- A beautiful, thriving countryside for all, forever.

- Getting what you need from the countryside, without damaging it.

- Farming that provides healthy, local foods and beautiful landscapes.

- Travel choices that do not wreck the countryside.

Country Land and Business Association (CLA) – Rural Tourism: Opportunities for Growth

1.46 The Country Land and Business Association (CLA) state that tourism is a big earner for the rural economy, and given the right conditions has the potential to be even bigger. As a result the CLA has developed its own policy for tourism and the rural economy 'Rural Tourism: Opportunities for Growth'.

1.47 The CLA, within this document, highlights the role of local authorities in particular in ensuring proper and effective marketing, but suggests that the value of tourism is often not matched by the allocation of sufficient funding commitments, for example in maintaining rural toilet facilities, and opening up new areas of access under the CROW Act.

1.48 The CLA is calling for tourism to be raised higher on the political agenda, and in particular is seeking to:

- raise the profile of rural tourism at all levels, be it at Whitehall, creating sustainable tourism partnerships with involvement of the public and private sectors, or encouraging RDAs to sufficiently support local tourist organisations;
- drive quality, local produce and loyalty by supporting easily understood quality assurance schemes, working up a rural tourism standard, and developing a voluntary code of minimum standards for rural tourism operators;
- encourage more effective marketing and promotion, by calling for securing the funding of TICs, and for TICs to have more integrated ICT systems, and for more remote villages to have local tourist information kiosks such as within pubs, village shop for example;
- seek to promote rural tourism as a part of programmes to combat social exclusion, such as developing trails; and
- open up access to buildings and features of interest to people with disabilities.

1.49 In addition, the CLA is challenging the Government to make the process of encouraging tourism enterprise more appealing to rural operators by:

- seeking a review of the VAT levels on tourist accommodation in Britain;
- reducing the standard rate of VAT on farm accommodation and ancillary services;
- requesting that new Planning Policy Statements should contain positive statements to encourage rural tourism development;
- suggesting that local planning authorities apply greater flexibility to applications for converting barns and to the use of standard highway criteria where there is a business need; and
- requesting that local planning authorities and English Heritage look more sympathetically at applications for an economic use of listed buildings in rural areas.

2 A2 – Asset & Appeal Audit

2.1 The popularity of the Norfolk Coast AONB to visitors is well known.

2.2 The north Norfolk coastline, along with Great Yarmouth, forms part of the traditional beach resort destination of Norfolk. The AONB area itself borders the popular resorts of Cromer, Sheringham and Mundesley along the northern stretch of the coastline; Hunstanton on its western coastal fringe; and includes the resort of Wells-next-the-Sea within its designation. As such, the AONB has long had an association with tourism.

2.3 However, changes in characteristics of tourists now means that the AONB and the activities that can be undertaken within the area have taken on a much greater significance over recent times. For instance, self-catering accommodation is now much more prevalent, offering greater freedom, exclusivity and higher perceived levels of comfort than either serviced accommodation or holiday parks. In addition, a greater proportion of holidays now involve some form of activity as either a prime or secondary motivation behind a trip being taken.

2.4 In the case of the Norfolk Coast AONB, these changes have become evident in the fact that the AONB is now viewed as an integral part of the overall tourism offer within Norfolk.

2.5 The following section highlights the key assets and attractions that motivate visits to the AONB, and also the level of businesses (accommodation, public houses, leisure-based) that help service this sector.

Tourism Assets & Appeal

2.6 The fundamental appeal of the Norfolk Coast AONB to tourists and tourism day visitors lies in the combination of its nature and wildlife assets, linked to the charm and character of the main settlements within the area.

Natural Characteristics as a Tourism Asset

2.7 Without doubt, the key asset within the Norfolk Coast AONB from a tourism perspective is in relation to the quality of the natural environment in its widest sense. The high value landscapes that are unspoilt by modern-day standards; the charm and character of its villages and coastal settlements; and the opportunity for ‘escapism’ all combine to provide an attractive proposition to both tourists and day visitor a like.

2.8 There has not been a recent study that identifies the overall significance of these aspects of the offer in attracting visitors. Needless to say, however, that the designation of the AONB denotes that the area has something special enough and unique enough to require conservation because its is deemed of national importance. Ultimately, therefore, these aspects are going to be of sufficient importance as to be the basis upon which trips to the AONB are based.

Settlements

2.9 The unique charm and character of the AONB’s main settlements, whether within the designation boundary (Wells-next-the-Sea, Burnham Market, Brancaster Staithe, Blakeney, Holme), or those on its periphery (Cromer, Sheringham, Mundesley, Winterton, Hunstanton, Holt), can provide either a main or supplementary motivation for visiting.

2.10 For the likes of Wells-next-the-Sea, Cromer, Sheringham, Mundesley and Hunstanton, their appeal combines the proximity of coast with their individual attractiveness as settlements. This includes opportunities for shopping, dining out and sightseeing, as well as participating in traditional ‘bucket

& spade' beach activities. The 'resort' aspect of these areas also means that the settlements benefit from having high concentrations of accommodation provision and other ancillary services.

2.11 For Blakeney, Burnham Market, Holme and Cley the appeal is concentrated on the quaint and unspoilt character of these small towns and villages, and their architecture.

2.12 Holt, on the other hand, has created its own particular niche – shopping. Holt is one of the few towns in the UK that has no major high street chains. Rather, Holt has become famed for its boutique shopping experience set within Georgian architecture. This includes antiques, clothing, butchers, fishmongers, cake shop, specialist sweet shop, and Bakers & Larners - an up-market department and grocery store. Wells is also reputedly growing a reputation for more boutique and antique shopping experiences.

Norfolk Coast AONB Attractions Sector

2.13 North Coast AONB has 33 specific visitor attractions, which cover a wide variety of topics and interests. The types of attractions are detailed in table 2.1.

2.14 Certain attractions comprise of a number of elements, which may be of different attraction types. For the ease of presentation, these attractions are listed under their main type only.

Table 2.1

Norfolk AONB Attractions by Type

Type of Attraction	**Number**
Museum & Galleries	3
Historic Properties	6
Steam/Heritage Railways	2
Parks & Gardens	1
Workplaces	2
Tours	3
Nature Reserves	12
Other	2
Farms	1
Trains	1
Grand Total	**33**

Source: Scott Wilson, 2005

2.15 The following audit provides comprehensive details of the characteristics, opening times and admission prices of the main attractions. See maps 2.1 to 2.2 for the spatial distribution.

Museums & Galleries

Muckleburgh Collection, Weybourne (Map 2.1 No. 1)

2.16 The Muckleburgh Collection is a privately owned museum dedicated to war artefacts and weapons, including 16 fully restored and working tanks.

2.17 Visitors can actually drive the tanks on site under prior arrangement and at extra cost. The ride lasts for approximately three-quarters of an hour.

2.18 In addition, there is a museum building on site which contains:

- military uniforms dating back to the 18th Century;
- heavy artillery, anti-aircraft artillery and transportation vehicles;
- an in-hall tank collection with examples from around the world;
- a maritime model collection; and
- other wartime memorabilia.

2.19 The Muckleburgh Collection is open daily between 20th March and 6th November. The Museum also holds the occasional special event. Admission charges are £5.50 per adult, £3.50 per child and £4.50 concessions. Tank rides are charged at £80 per person.

2.20 In 1999, the last time attendance was officially recorded, the Muckleburgh Collection received just under 60,000 visitors.

Other Museums - Under 10,000 Visitors

2.21 Other museums within the Norfolk Coast AONB include:

- ***Glandford Shell Museum***, Holt **(Map 2.1 No.2)** - housed in the oldest purpose-built museum in Norfolk and contains reputedly the finest seashell collection in the UK - sea shells, artefacts, fossils, scraps of ingeniously carved scrimshaw, tiny figures made out of shells. The admission price is £2.00 per adult, £0.50 per child and £1.50 concessions.
- ***The Saltwater Gallery***, Burnham Market **(Map 2.1 No.3) –** established by a private photographer Cory Wright, the gallery exhibits and sells colour photographs of the coastline and landscape of the British Isles and is housed in the 'Bunkhouse', a converted barn. The Gallery is open 11-5pm most days of the week, year round and is free.

Historic Properties

Sandringham House, Museum and Gardens (Map 2.1 No. 4)

2.22 Sandringham House was built in 1870 for the Royal family; members of which regularly reside there today. The lower floors are open to the public; the museum houses collections of Royal vehicles, rare ceramics, photographs and memorabilia; and the Gardens cover 60 acres.

2.23 The Estate is a designated Country Park with 243 hectares and two nature trails available for visitors to enjoy.

2.24 The House, Museum and Gardens are open between 15th April and 29th October. Admission prices for the House, Museum & Gardens are £8.00 per adult, £5.00 per child and £6.50 per concession; Museum & Gardens only; £5.50 per adult, £3.50 per child and £4.50 per concession. A family ticket for 3 adults and 2 children costs £21.00 and £14.50 respectively. A Garden Tour is available for an additional £2.00.

2.25 There is a visitor's centre comprising of:

- 200 seat self service and 60 seat waitress service restaurants
- Gift Shop and Plant Centre
- Tractor and Trailer Tours of the Country Park

2.26 The Estate has an events calendar consisting of, for example, festivals of food and wood, craft fairs and the Sandringham Flower Show.

Castle Rising Castle (Map 2.1, No.5)

2.27 Castle Rising Castle is a 12th-century domestic keep, set amid huge defensive earthworks and is owned by English Heritage.

2.28 Opening times are; daily 10am-6pm April - November and 10am-4pm Wednesday - Sunday November - April. Admission is £3.85 per adult, £2.20 per child, £3.10 concession and £11.50 for a family of 2 adults and 2 children.

2.29 Audio tours are available and there is a gift shop. Although there are no refreshments on offer, picnics in the grounds are welcome.

Holkham Hall, Estate Bygones Museum and Park (Map 2.1 No. 6)

2.30 Holkham Hall & Estate, home to the Coke Family and the Earl of Leicester, is a multi-gate attraction in that it contains a series of attractions, which have their own opening, entrance and admission policy. This includes:

- Grounds = Open everyday of the year except Christmas Day to walkers and cyclists, but closed to vehicles at weekends November - April, except Easter. Admission is free at all times.
- Holkham Hall = Open 2nd June to 30th September 2005 1pm to 5pm, every day except Tuesdays and Wednesdays. Admission is charged at £6.50 per adult and £3.25 per child.
- Bygones Museum = Exhibition of domestic and agricultural memorabilia. Open 2nd June to 30th September, 12noon - 5pm. Admission is charged at £5.00 per adult and £2.50 per child.
    - A combined ticket to Holkham Hall and Bygones Museum is charged at £10.00 per adult and £5.00 per child.
- Boat Trip = Charged at £2.50 per adult and £2.00 per child.
- History of Farming Museum = illustrates how a large estate such as Holkham works and has evolved. Entrance is free.

2.31 The last recorded attendance to the paying attractions was 22,019 in 2003. However, the number of visitors to the Estate as a whole is much greater, and is estimated at 200,000 per year.

Felbrigg Hall & Park (Map 2.1 No. 7)

2.32 Felbrigg Hall, managed by the National Trust, contains its own original 18th-century furniture, one of the largest collections of Grand Tour paintings by a single artist, and a comprehensive library.

2.33 In addition to providing visitor access to the Hall itself, visitors can also walk, via way marked routes, around the Walled Garden, which has been restored and features a series of potager gardens, a working dovecote, and the National Collection of Colchicums (Naked Ladies). There are also walks to the church and lake, and around some other areas of the 1,760 acres of the Estate, including 500 acres of woodland.

2.34 The house and gardens are open between mid-March and the end of October, whilst the Estate is open for walking all year round. Admission to the house is charged at £6.20 for adults and £3.10

for children; £2.70 for all to just enter the Gardens. Access to the Estate is free to pedestrians and cyclists.

2.35 It is estimated that the Hall attracted 67,500 visitors in 2003.

Waxham Barn (Map 2.1 No. 8)

2.36 Waxham Great Barn is a Grade 1 listed building and was built around 1570 as a display of Woodhouse wealth. At 180 feet long, it is believed to be the largest ancient Barn in the country. Its roof includes tie beams and hammer beams while its walls of coursed flint decorated with diamond patterned brickwork have limestone buttresses taken from three local dissolved and disintegrating priories.

2.37 Previous owners Norfolk County Council received a £0.5 million lottery grant for restoration in 2003. The repair of the barn's three derelict wings, with re-thatching of the roofs and the conversion of one wing to provide visitor facilities, including a café, was completed in 2004.

2.38 The Barn, which is now leased to the Norfolk Historic Buildings Trust, houses permanent exhibitions about the Barn and its environment, and hosts other travelling exhibitions and events such as threshing and 'bat spotting' evenings.

2.39 The Barn is open daily (closed Wednesday) and admission is £2.50 per adult and free for children.

Horsey Windpump (Map 2.1 No. 9)

2.40 The Horsey Windpump is a fully restored historic drainage Windpump. In addition to its heritage interest, the Windpump also affords striking views across Horsey Mere, one of the Norfolk Broads, and there is access to the beach at Horsey Gap. The Mere is internationally important for wintering wild fowl.

2.41 The attraction, which is owned by the National Trust, is open from the beginning of March to the end of October. Admission is charged at £2.00 per adult and £1.00 per child.

2.42 In 2004 the attendance was 12,446.

Steam/Heritage Railways

North Norfolk Railway – Poppy Line (Map 2.1 No. 10)

2.43 The North Norfolk Railway offers a 10.5 mile round trip by steam or vintage diesel train from Sheringham to Holt, stopping at stations in Weybourne and Kelling Heath.

2.44 The journey passes through a section of the AONB, including Kelling Heath and Sheringham Park, offering a unique way to experience the areas of fauna and flora.

2.45 As well as the journey itself, visitors benefit from the preserved historic stations, a museum of local railway history, a museum signal box and a visitors centre. There are also buffets and souvenir shops.

2.46 All full round trip tickets from any station provides unlimited travel along the route to any station on the day of purchase. The price of the ticket depends upon whether travel is via a steam or diesel train, with the diesel train being around £3.00 cheaper for an adult journey. A standard ticket on a steam train costs £8.50 per adult, £5.00 per child and £7.50 concessions.

2.47 The line operates all year round, though not on certain days between October and March. In 2004, North Norfolk Railway recorded an approximate attendance of 119,485 visitors.

Wells & Walsingham Light Railway (Map 2.1 No. 11)

2.48 The Wells & Walsingham Light Railway is reputedly the longest 10¼" narrow gauge steam railway in the world, and is home to the unique Garratt locomotive Norfolk Hero that was specially built for this line.

2.49 The service journeys from the seaside and harbour town of Wells to the town of Walsingham, crossing 5 bridges and travelling through the countryside. The journey time is approximately 30 minutes in each direction.

2.50 Several journeys are conducted daily from Easter to the end of October. The price per trip is £6.50 per adult and £5.00 per child for a return journey. In 2003, the number of passengers was estimated at 20,000.

Workplaces

Norfolk Lavender (Map 2.1 No. 12)

2.51 Norfolk Lavender is a Lavender Farm and is open all year round between 9am and 4/5pm. There are several components to the attraction:

- Caley Mill and the National Collection of Lavenders = Caley Mill, the headquarters of Norfolk Lavender Ltd is a distinctive landmark with over 100 different lavenders to see and smell.
- The Fragrant Gardens = A Fragrant Flower Garden (A 4 acre garden with paths and bridges amongst fragrant plants); Fragrant Plant Centre; and The Herb Garden.
- Guided Tours = Garden Tour and Distillery charged at £2.25 per adult and £2.25 per child April-September. Field Tour charged at £4.50 June-August, which also includes a trip to the 50 acre lavender field.
- The Tea Rooms and Gift Shops.

Parks & Gardens

Sheringham Park and Visitor Centre (Map 2.1 No. 13)

2.52 Humphry Repton designed Sheringham Park in 1812, which is now owned by the National Trust. The Park is particularly famous for its show of rhododendrons and azaleas (flowering mid-May to June) in the large woodland garden.

2.53 There are way marked walks through the park and mature woods, including a route to the North Norfolk Railway Station (a private steam railway). Visitors can enjoy extensive views of the coast and countryside from the three viewing towers.

2.54 The opening times of the visitor centre and café vary throughout the year and parking is £3 per car for non National Trust members.

Other

- ***Letheringsett Watermill*** **(Map 2.1 No. 14)** – Norfolk's only working water-powered flourmill – Open all year. Admission is charged at £3.50 per adult and £2.50 per child and concessions, which includes a working demonstration. The visitor attendance was recorded as 6,700 in 2004.

Tours

Bishop's Boat Seal Trips (Map 2.1 No. 15)

2.55 Bishop's Boat Seal trips offer visitors a chance to view seals in their natural habitat. The trip lasts 1-2 hours, departing from Blakeney harbour or Morston quay and travelling to Blakeney Point, which is home to a colony of 500 grey and common seals. Visitors land at Blakeney Point National Nature Reserve, managed by the National Trust.

2.56 The tours are conducted between March and October. The price of the tour is £7.00 per adult and £4.00 per child.

Beans Seal Trips (Map 2.1 No. 16)

2.57 Offering a similar tour to Bishop's Boat Seal Trips, the tour travels from Blakeney to Blakeney Point and the seal colony.

2.58 The tours are conducted between March and October. The price of the tour is £6.00 per adult and £4.00 per child.

Temples Seal Trips (Map 2.1 No. 17)

2.59 Trips on the Four Sisters and Morston Ferry boats depart from Morston Quay. The duration of each trip is approximately 1 hour plus an additional 30 minutes-1 hour should there be a landing on Blakeney Point. Common and Grey seals can be viewed in their natural environment on and around Blakeney Point.

2.60 Trips depart year round, but are largely dependant on the tide, and cost £7.00 per adult and £4.00 per child.

Nature Reserves

Ringstead Downs (Map 2.1&2.2 No. 18)

2.61 Ringstead Downs is a rolling chalky landscape (11 ha. of chalk grassland) providing extensive views and is managed by the Norfolk Wildlife Trust (NWT).

2.62 Over 243 species of butterfly have been recorded at the site and there are plant life and animals (such as the oak and speckled bush cricket) of interest. There is a small car park available free of charge and entry is free.

Holme Dunes NNR & Visitor Centre (Map 2.1&2.2 No. 19)

2.63 Holme Dunes is part of the North Norfolk Coast SSSI. It is owned and managed by NWT and covers 213 ha. The Reserve contains many habitat types including beach, sand dunes, mudflats, salt marsh, grazing marsh, pine shelterbelt and freshwater pools.

2.64 Holme is internationally important for birds. From the hides, nesting birds can be viewed on the ridges in the spring and summer, and wildfowl on the marshes from autumn.

2.65 There is a 4km nature trail and a small charge is made to non-NWT members. The visitor centre is open Easter-October.

2.66 It is estimated that the Dunes attract over 100,000 people annually.

Titchwell Marsh & Visitor Centre (Map 2.1&2.2 No. 20)

2.67 Titchwell Marsh is reputedly the RSPB's most visited Reserve. Thousands of migrating birds pass the wetland Nature Reserve and many stop for the winter. There are three hides and several trails for bird watching.

2.68 The lagoons are nationally important for breeding avocets (between 7.2 and 9% of the UK population).

2.69 There is a visitor centre and shop open daily 9am to 5pm (4pm November-March). There is also a café. Non-RSPB members are charged £4 per car, £10 per minibus and £20 per coach.

2.70 It is estimated that the Marsh attracts over 130,000 people annually.

Cley Marshes & Visitor Centre (Map 2.1&2.2 No. 21)

2.71 NWT's Cley Marshes is reputedly one of the UK's premier bird watching sites, with year-round viewing opportunities.

2.72 The Reserve has a visitor centre, which provides information on the local Reserves and wildlife. Visitors can meander around the pools and scrapes via boardwalks and are able to glimpse the bird life through the reeds.

2.73 Currently the Nature Reserve is open daily, with the visitor centre open between late March to early October 10am to 5pm, early November to early December 10am to 4pm. Access to the Reserve costs £3.75 per adult, with children and NWT members allowed access free of charge.

2.74 The visitor centre received 16,992 visitors in 2000; the last recorded visitor attendance. It is estimated that the Reserve attracts over 100,000 visitors annually.

2.75 A new visitor centre is proposed for Cley Marshes as part of a joint management and investment initiative between themselves, NWT, the National Trust and the Environment Agency. Dubbed 'GEESE' (Glaven Education and Environmental Sustainability Enterprise), the £2.5million programme is aimed at improving flood and coastline defences, and providing better visitor and education facilities.

Salthouse Marshes (Map 2.1&2.2 No. 22)

2.76 Salthouse Marshes, 2km east of Cley Marshes, is managed by the NWT and is protected from the North Sea by a shingle bank. Grazing marsh and saline lagoons provide a habitat for Black-tailed Godwit, Ruff, Redshank, Lapwing, Avocet, Snow Bunting, Shore Lark and several thousand Brent Geese in winter.

2.77 There is no charge for visiting the 66 ha Reserve.

Blakeney NNR (Map 2.1&2.2 No. 23)

2.78 Blakeney Point represents one of the largest expanses of undeveloped coastal habitats of its type in Europe (1,097 ha). Managed by the National Trust, the Reserve is a shingle spit, which constantly changes due to storm and tide action and is an important breeding ground for seals.

2.79 Blakeney NNR is a Special Protection Area (SPA) and part of a Ramsar site (wetlands of international importance designated under the Ramsar Convention).

2.80 An information centre and tearoom are provided at Morston Quay. Access to the Reserve is on foot from Cley Beach (3½ml) or by ferry from Morston and Blakeney based on tidal conditions. There is restricted access to certain areas of the Point during the main bird-breeding season between April and September.

2.81 Access to the Reserve is free and there is a circular walking route with boardwalks and interpretation for visitors at the Old Lifeboat House.

2.82 Tours are available (see Tours section in this report). From 2004-2005 98,682 cars (actual paying + estimated free) visited the Reserve.

Holkham NNR (Map 2.1&2.2 No. 24)

2.83 Holkham NNR is a vast Reserve between Burnham Norton and Blakeney covering 4,000 hectares, and is therefore very diverse. It includes a wide range of habitats: sandflats, sanddunes, sandspits, saltmarsh, grazing marsh, green pastures and mixed woodland. The saltmarsh and mudflats are dissected by a number of tidal creeks.

2.84 The Reserve accounts for 7% of the British population of Little Turns whose habitats are diminishing.

2.85 Public footpaths allow the exploration of most of the Reserve with a number of information boards along the way. There are 3 car parks serving the Reserve linked by the Norfolk Coast Path and access to the Reserve is free.

2.86 It is estimated that the Reserve, managed by English Nature, attracts between .75 and 1 million visitors each year.

Scolt Head Island NNR (Map 2.1&2.2 No. 25)

2.87 Also managed by English Nature, Scolt Head NNR is a 727-hectare offshore barrier island and is a continually changing sand dune, beach and saltmarsh environment.

2.88 Located off the coast, north of Burnham and Brancaster, the Reserve has four major habitats: shingle, sand flats, intertidal mud and saltmarsh.

2.89 The Ternery to the west of the Island is closed to visitors mid-April to mid-August (breeding season). Dogs are not permitted on the entire Reserve between these dates. Several species of tern breed in the shingle and dunes.

2.90 Scolt is internationally important for its over-wintering populations of geese.

2.91 Access is by boat departing from the quay at Burnham Overy Staithe and visiting times are restricted by the tides. There is no fee to enter onto the Reserve itself.

2.92 It is estimated that 5,000 people visit the Reserve annually.

Winterton Dunes NNR (Map 2.1&2.2 No. 26)

2.93 The majority of the Reserve is a coastal strip north of Winterton-on-Sea. To the north, it extends as far as the local coastal landmark known as Bramble Hill, 2 km to the east of the village of Horsey.

2.94 Winterton Dunes NNR is 108 hectares in size and part of the Winterton-Horsey SSSI. Habitats include sand dunes, dune heath, dune slacks, dune grassland and beach. The Dunes are home to the rare Natterjack toad.

2.95 A public footpath crosses the length of the Reserve and interpretation panels are provided for visitor information. The nearest car park is at Winterton to the south of the Reserve. There is no fee to enter the Reserve.

2.96 Visitation is quantified through visits to the Horsey Windpump. From 2004-2005 there were 12,446 visitors.

Brancaster Staithe (Map 2.1&2.2 No. 27)

2.97 Managed by the National Trust, Brancaster Staithe Nature Reserve is a 4,000-acre area. It consists of four miles of tidal foreshore, with extensive areas of saltmarsh, intertidal mud and sand flats, all with active bird-life and extensive bird-watching opportunities. The Reserve includes the site of the Roman fort of Branodonum.

2.98 Grey and Common Seals rely on this important habitat as well as thousands of shorebirds.

2.99 The Reserve is free for all.

2.100 The Brancaster Millennium Activity Centre offers day and residential courses to school children, adults and families. Adult and family courses include everything from weaving and watercolours to baking and bird watching. The Centre educates as to how we can reduce our impact on the natural world and the importance of the landscape and heritage sites.

Holme Bird Observatory Reserve and Visitor Centre (Map 2.1&2.2 No. 28)

2.101 The Observatory is an area of 90 acres behind the dunes between Thornham and Holme. It is managed by the Norfolk Ornithologist Association (NOA) and is reputedly the only accredited bird observatory in Norfolk.

2.102 The area is designated as an SSSI and is set amidst sand dunes, pines, scrub, salt and freshwater pools. Its position means that it is a key migration point for waders.

2.103 The Reserve has five hides, which overlook a variety of bird habitats and winter-feeding stations and bird watching guided tours can be arranged by special request.

2.104 There is a fee of £3 levied to visitors (free to members). There is a dedicated sea-watching hide, the first in Norfolk, for the exclusive use of NOA members.

2.105 The Observatory operates an active ringing programme and moth-trapping programme. Over 50,000 birds have been ringed and over 300 species recorded.

2.106 There is a Visitor Centre with a shop and refreshments.

Dersingham Bog NNR (Map 2.1&2.2 No. 29)

2.107 Dersingham NNR is part of the Sandringham Estate. It is located East of the village of Wolferton and is managed by English Nature.

2.108 The Reserve has three distinct habitats: mire, heath and woodland. Dersingham contains the largest example of acid valley mire in East Anglia, which is waterlogged for most of the year.

2.109 The Reserve is free of charge to access.

Other

Norfolk Fishing Trips and Charter (Map 2.1 No. 30)

2.110 Based in Thornham, Norfolk Fishing Trips and Charter offer a range of ‘tailor made’ services including seal and bird watching, diving, hen and stag parties and trips into the Wash estuary, for example.

2.111 Trips normally depart from Brancaster-Staithe harbour on Katie Louise a 37ft transocean flybridge cruiser. Katie Louise 2, a brand new luxury catamaran, will replace Katie Louise shortly.

2.112 Examples of offering and price: 7-8 hours of tope fishing including all gear and lunch = £75 per person. 3-4 hours of mackerel and bass fishing (no food) = £30 per person.

Northshore Sport and Leisure/ SailCraft Sea School (Map 2.1 No. 31)

2.113 Founded in 1983, SailCraft Sea School is a RYA training centre, which utilises the sheltered water that the natural harbour provides. The open sea beckons the keen navigator and in the worst of conditions the creeks to Burnham Overy Harbour offer an alternative.

2.114 Boat sales and hire are available in addition to the training courses in dinghy sailing, keel and power boating.

Trains

Bittern Line (Map 2.1 No. 32)

2.115 The Bittern Line is a railway line, which crosses into the AONB north of North Walsham and serves part of the AONB. It is not considered an attraction in the truest sense, but it does provide visitors with an opportunity to view some attractive sites that they would not otherwise have seen.

2.116 In addition, the success of The Bittern Line is being driven by The Bittern Line Community Rail Partnership, which is promoting the line through small scale initiatives such as an attractive pictorial line guide, guided and D.I.Y. walks from stations along the route, and cycling routes from stations on the line. As such, the Bittern Line is advertised as much for the interest of the route as it is as a mode of transport. It is for these reasons that this transport service is included as an attraction in the AONB.

2.117 The route is a main line route between Norwich and Cromer, and Sheringham, and stops at Hoveton & Wroxham, Worstead, North Walsham, Gunton, Roughton Road, Cromer, West Runton and Sheringham.

2.118 Through the initiatives it has introduced, the Partnership is realising an increase in patronage of over 18% a year.

Farms

Norfolk Shire Horse Centre (Map 2.1 No. 33)

2.119 The Norfolk Shire Horse Centre is home to a variety of different breeds of draft horses from both the UK and Europe.

2.120 The shire horses are complemented with a number of breeds of ponies, which are native to the UK, and a collection of horse-drawn machinery wagons, carts and old implements like the binder, the mowing machine and a toppler. Demonstrations are conducted throughout the day and a ride in a cart is available to children. Children can also feed farm animals, see foals and all guests can visit a museum and watch a video show.

2.121 The Centre is open daily, with the exception of Saturday, from the end of March to the end of October, and between 10am and 5pm. Admission costs £5.80 per adult, £3.80 for children and £4.80 concessions.

2.122 Attendance to the Centre in 2004 was estimated at 35,000.

Attractions Outside the AONB

Bircham Windmill

2.123 Bircham Windmill is the only windmill in working order in the area open to the public. Visitors can climb to the very top (5 floors) and go out on the fan deck.

2.124 There is also a bakery, tearoom, gift shop, cycle hire and plant stall open daily from 20th March until late September, 10am – 5pm.

2.125 Admission is charged at £2.75 per adult, £1.50 per child and £2.50 per concession.

Priory Maze and Gardens, Sheringham

2.126 Priory Maze and Gardens covers a 10-acre area, and includes a wild flower meadow, natural running water streams, ponds, and a herb and aromatic gardens.

2.127 The site also includes a Priory Maze, a traditional hedge maze, based around the ruins of the adjacent Beeston Priory. A quiz trail is available. The attraction also has a tearoom and plant sales centre.

2.128 The site operates different opening periods for each of the facilities. The main gardens and the plant centre are open from March, whilst the tearoom is available all year-round. Admission to the Gardens is £4.00 per adult, £2.50 for children and £3.50 concessions.

Sea Life Sanctuary

2.129 There are more than 30 permanent displays all showcasing the rich diversity of life under the waves. The sanctuary also provides a safe haven for more than 30 sick, injured or orphaned seals.

2.130 There is a marine hospital and an aquarium for visitors to view.

2.131 Open daily 10am until 4pm (last admission). Admission cost is £9.50 per adult and £6.50 per student, child and OAP.

Le Strange Old Barns

2.132 Reputedly the largest antiques, working arts and crafts centre in Norfolk.

2.133 Daily varying craft demonstrations including woodturning, teddy making, flower crafts, glass painting and jewellery beadwork can be seen alongside the working pottery.

2.134 Parking and admission are free. Opening times are: summer 10am-6pm and winter 10am-5pm.

Snettisham Park & Farm

2.135 Snettisham Park is a countryside Park with a number of attractions for all the family:

- Deer Safari – A 45-minute safari around the farm by tractor to view stags and deer;
- Discovery Trail;
- Petting Farm;
- Adventure playground; and
- Visitor Centre, Gift and Farm shop, tearoom and leather workshop are all free of charge.

2.136 Open daily February - November 10am-5pm. Admission costs for the farm only are: £4.95 per adult, £3.95 per under 16, £4.25 per concession and £16.00 per family (2 adult, 3 children); farm and safari: £8.50 per adult, £6.50 per under 16, £7.50 per concession and £28 per family.

Langham Glass, Rural Crafts & Maze

2.137 Langham Glass (previously located in the village of Langham, now moved to Tattersett) provides visitors with an opportunity to discover the history and scientific aspects of glassmaking.

2.138 The attraction includes a museum, live demonstrations, and a video, detailing how glass is made from its raw base of sand, the adding of lead oxide and other chemicals, and the firing of the furnace. The interpretation covers the history of glass making at Langham Glass and the part that glass has played in the history of mankind.

2.139 In 2000, visitor attendance was estimated at 82,000.

2.140 In addition to glass making, Langham Glass also has a Maize Maze.

2.141 Like the South Creake Maze, the maze can be designed yearly and in 2005 was a Lord Nelson Bicentenary Celebration Maze. It is set in seven acres with three miles of walkways.

2.142 The maze is open from early July to mid-September. Entry is charged at £3.95 for adults, and £2.95 for children and concessions.

2.143 See Map 2.3 for the Distribution of Attractions Outside AONB, in North Norfolk.

Wider Assets and Appeal

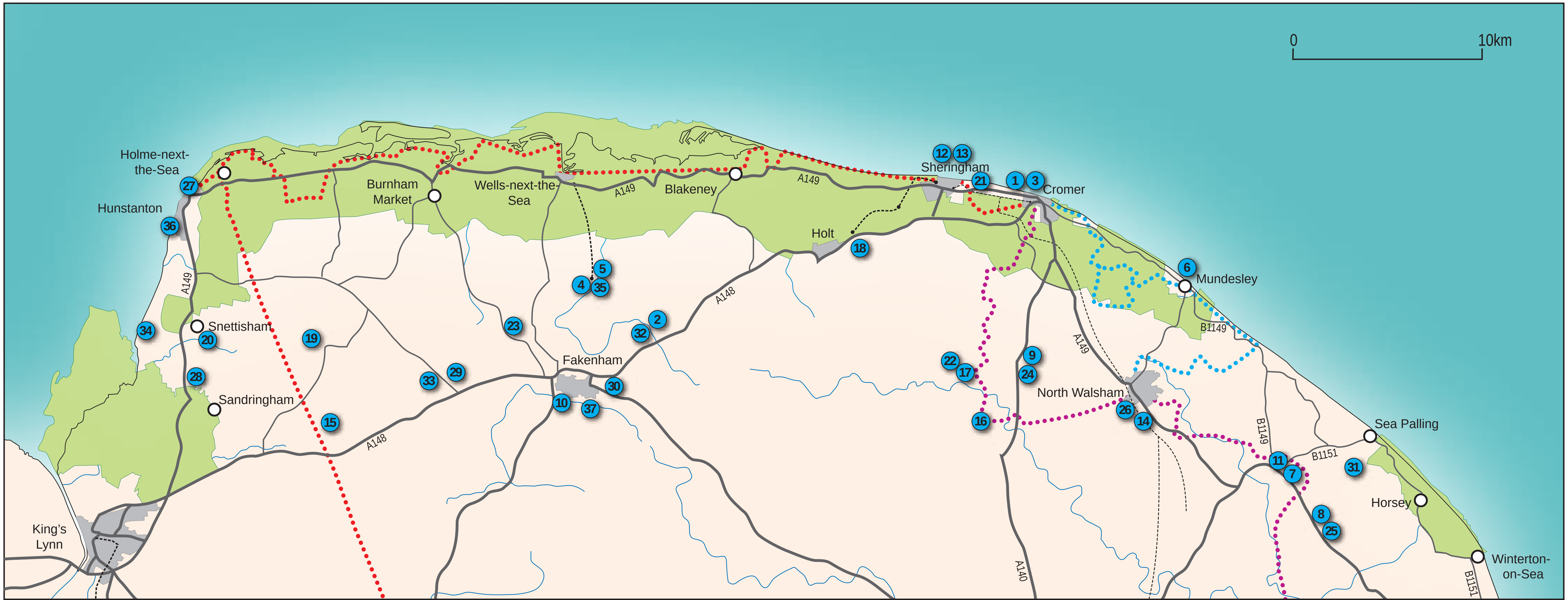
2.144 An important factor to bear in mind in relation to any destination, but particularly the Norfolk Coast AONB, is that destinations rarely operate in isolation.

2.145 In the case of the AONB, elements of the visitor sector are likely to be influenced by visitors to the resorts of Cromer, Sheringham, Mundesley and Hunstanton; King's Lynn in relation to the western outlier, and potentially Norwich and Great Yarmouth in relation to the eastern outlier.

2.146 In terms of the Norfolk resorts, there is understandably a significant bias towards the more traditional 'bucket and spade' holiday, with seaside promenades and arcades adjacent to easily accessible sandy beaches a common feature. These areas attract very high volumes of visitors, particularly families during peak season and the elderly in the shoulder season.

2.147 Whilst in the past these visitors would have largely confined their activity to these resorts alone, visitors today have greater mobility and desire for exploration, they are much more willing to venture to other nearby areas of interest. This includes sightseeing attractions, nature/wildlife sites, and visiting countryside and fishing villages, for example. In this respect, the likes of Sandringham House, Holkham Hall, and Felbrigg Hall; the various Nature Reserves; North Norfolk Railway – Poppyline; and Blakeney, Wells-next-the-Sea, and the Burnham's for example; will all play a major role in drawing visitors away from these resorts.

2.148 Likewise, specialist activities are having a growing influence in encouraging visitors to widen their focus of activity during their stay. Generally, this is promoted as a means whereby visitors can gain a richer and more fulfilling experience during their visit. This in turn could encourage repeat visits and recommendations, and the spreading of the [economic] benefits that visitors have, with much of their spend in other areas being additional rather than displaced spend.



Norfolk Coast Attractions Outside AONB

1. Cromer Museum
2. Thursford Collection
3. Henry Blogg Museum RNLI
4. Walsingham Abbey Grounds and Shirehall Museum
5. Great Walsingham Gallery
6. Mundesley Maritime Museum
7. Museum of the Broads
8. Broads Museum & Sutton Mill
9. Straw Museum
10. Fakenham Museum of Gas & Local History
11. Stalham Old Firehouse Museum
12. Sheringham Museum
13. Henry Ramey Upcher Lifeboat Mueum
14. Norfolk Motorbike Museum
15. Houghton Hall
16. Blickling Hall
17. Wolterton Hall & Park
18. Baconsthorpe Castle
19. Bircham Windmill
20. Snettisham Park & Farm
21. Priory Maze and Gardens
22. Mannington Gardens
23. South Creake Maize Maze
24. Alby Crafts and Gardens
25. Sutton Pottery
26. Cat Pottery
27. Le Strange Old Barns
28. Dersingham Pottery
29. Langham Glass, Rural Crafts and Maze
30. Pensthorpe Nature Reserve & Gardens
31. Hickling Broad Nature Reserve
32. Thursford Wood Nature Reserve
33. Syderstone Common Nature Reserve
34. Snettisham Nature Reserve
35. Shrine of our Lady Walsingham
36. Sea Life Sanctuary
37. Fakenham Racecourse

Peddars Way & Norfolk Coast Path
Weavers' Way
Paston Way
Railway Lines

Map 2.3

Distribution of Attractions Outside AONB

3 A3 - Tourism Plant Audit

Tourist Accommodation

3.1 Scott Wilson has conducted an audit of accommodation establishments within the Norfolk Coast AONB. This has been completed with the assistance of North Norfolk District Council and King's Lynn & West Norfolk Borough Council who supplied us with their accommodation databases.

3.2 The audit is based on postcodes rather than the AONB boundary. With agreement of the Partnership, we have grouped the following postcodes to allow for analysis of the accommodation distribution:

- King's Lynn & West Norfolk AONB – PE30 3, PE31 6, PE31 7, PE31 8, PE35 6, PE36 5, PE36 6 (where addresses are confirmed as being inside the AONB).
- North Norfolk AONB – NR23 1, NR25 6, NR25 7, NR11 8, NR27 0, NR29 4.
- Great Yarmouth – NR12 0.

3.3 It should be noted that some of the postcodes included in the zones, such as PE31 8, PE31 6, NR29 4 and NR12 0 have a large proportion of their area outside of the AONB. Where possible we have aimed to verify the location of any businesses that fall within these postcodes to ensure they are within the AONB. Likewise, accommodation in Hunstanton (PE36 5), Heacham (PE31 7) and Mundesley (NR27 0) are excluded where we have been able to determine the exact location of the establishment.

3.4 According to our investigations, we believe that the level of commercial accommodation stock is approximately (see Map 3.1):

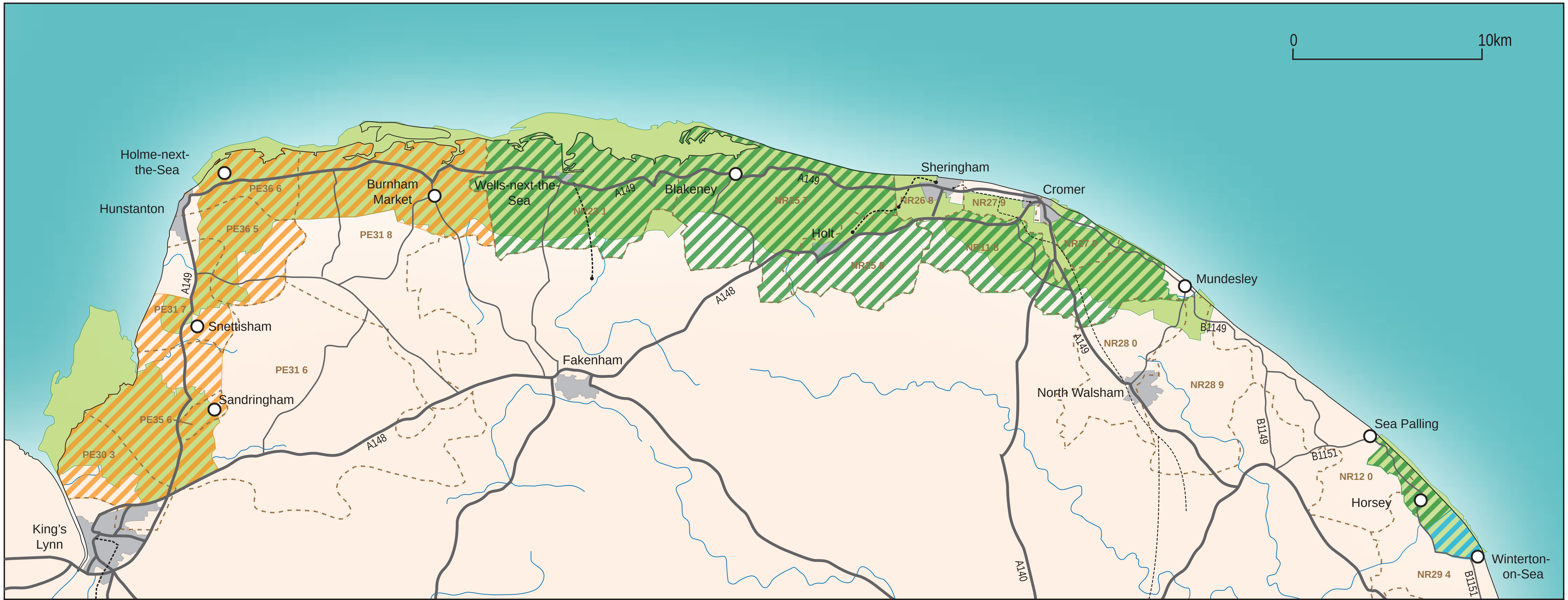
- 242 serviced establishments, offering 2,829 bedspaces within the AONB;
- 693 self-catering units;
- 645 static units within 22 holiday parks* available as holiday rentals;
- 2,824 touring pitches within 22 camping and caravan parks*; and
- 522 Group bedspaces (education centres)

*(*please note that some of the touring space is also provided within holiday parks, i.e. there are not 44 holiday parks and camping and caravan parks altogether).*

3.5 In addition, there is approximately:

- 2,580 static caravan units which are privately owned (and not officially sub-let for holidays);
- 2,088 second homes (houses/flats) that are privately owned (and not officially sub-let for holidays).

3.6 It should be noted that this distribution excludes the key resorts of Cromer, Sheringham, Hunstanton and Mundesley. Whilst these areas have been excluded to allow for a more meaningful appraisal of accommodation stock within the AONB itself, taken alone these figures could give a misleading impression of the overall accommodation stock along this stretch of the coastline. For instance, it



The Norfolk Coast Area of Outstanding Natural Beauty

Kings Lynn & West Norfolk Borough Council Area

North Norfolk District Council Area

Great Yarmouth Borough Council Area

Railway Lines

	Total	N. Norfolk	W. Norfolk	Great Yarmouth
Serviced Bedspaces	2829	55%	42%	3%
Self Catering Units	693	56%	42%	3%
Touring Caravans/Tent Pitches	2824	60%	33%	7%
Holiday Park/Static Units	3226	76%	23%	1%
Statics Actual - Owned	2580	76%	23%	1%
Statics Actual- Let	645	76%	23%	1%
Group Bedspaces	522	71%	29%	0%
Second Home Units	2088	63%	33%	1%

Map 3.1

Accommodation Distribution (by Council Area) should be recognised that if these resorts were included, the proportion of serviced bedspaces would certainly increase.

Information Centres

3.7 There are two tourist information centres (TICs) which directly serve the AONB, namely:

- Wells-next-the-Sea – open between March and October, Monday through to Sunday; and
- Burnham Deepdale – open all year between 10am and 4pm.

3.8 However, there are other TICs within the wider area that also service information on the AONB, including Cromer, Sheringham, Holt and Hunstanton.

Leisure Activities

Walking Routes

3.9 'Enjoying the Norfolk Countryside', a Norfolk County Council publication, details three long distance walks and 12 circular walks within the Norfolk Coast AONB.

3.10 The long distance walks are:

- Paston Way, which is a walk between Cromer and North Walsham, which includes a circular section through Southrepps, Antringham and Trunch. It is possible to combine this route with a journey on the Bittern Line, which stops at North Walsham.
- Weavers' Way, which runs for 61 miles between Cromer and Great Yarmouth. It is named after the once important weaving industry that flourished in the Middle Ages around North Walsham. The route travels via Aylsham, North Walsham, and Stalham in the District.
- The Norfolk Coast Path, which navigates the Norfolk coastline between Cromer and Wells-next-the-Sea and further on to Hunstanton, forms part of a 93 mile National Trail route. This route also includes Peddars Way. The start point for the route is Knettishall Heath Country Park and the finish is Cromer Pier. The route takes approximately 8 days to complete altogether. The entire trail is suitable for walkers, but around half of the route is also accessible for cyclists and horse-riders, including small sections of the Norfolk Coast Path.

3.11 The circular walks are spread throughout the district, with the majority starting and finishing within a town or village such as Brancaster, Burnham, Blakeney, Holt, Southrepps and Overstrand, and Winterton. The length of the routes varies from 3.5-miles to 10-miles.

3.12 It should be noted that other walks exist within the AONB area, published by enthusiasts and people with a good working knowledge of the public rights of way within the AONB. It is beyond the scope of this study to detail all of the walks that may be available, but for example KL&WN have produced a series of walking guides (Norfolk Heritage Walk, Walks in the Fields of Norfolk, and Wilderness Walks) available in and around the western outlier and around Old Hunstanton, and the Burnhams.

Cycle Routes

3.13 The AONB area, through the activities of the district authorities, is also promoted as a good setting for cycling, with the environment and landscape able to offer rides to suit most abilities.

3.14 Altogether, the Norfolk Coast AONB is said to have in excess of 350 miles of waymarked cycle routes. These include:

- SUSTRANS Norfolk Coast Cycleway (National Route 30), a predominantly coastal route, travels from Kings Lynn to Great Yarmouth. This includes seven loop routes off the main trail, such as a 10-mile circuit covering Wells and Holkham.

- Nelson's Norfolk Cycling Discovery Route, published by the East of England Tourist Board, is a 29-mile circular route (with short-cut) that starts and ends in Fakenham, passing through Burnham Thorpe, Holkham Hall, and Little Walsingham.

- Quiet Lanes Cycle Route, which was piloted in North Norfolk, with the initiative involving country lanes that are given special priority to cyclists, walkers and horseriders and where motorists are encouraged to take particular care. The quiet country lanes occupy a triangle of routes between Cromer, Bacton and North Walsham, covering some 36 miles altogether including some of the East zone of the AONB. The designated Quiet Lanes have specific signposting upon entry and exit.

- Various cycling guides, such as the Norfolk Coast by Bike guide and 12 cycle tours of King's Lynn and Hunstanton;

3.15 This is in conjunction with various initiatives that aim to make the prospect of cycling within the Norfolk Coast AONB a much more attractive proposition, namely:

- The National Trust and RSPB offer cycle parking at key attractions and facilities as part of its 'Widen the Choice' rural transport partnership, a joint partnership initiative with the Countryside Agency and East of England Tourist Board to encourage greater cycle use within the region.

- Kelling Heath Holiday Park cycle hire facilities and North Norfolk Poppy Line have created the 'Huff & Puff Cycle Route'. This trail, which starts and finishes at Kelling Heath, takes cyclists on a 5.5-mile bike ride and a trip on the Poppy Line, with the cost of £12 including both cycle hire and rail ticket.

- Kelling Heath also offers trails around its 250 acres of woodland, a 12-mile Coastal Discovery trail and Cromer Challenge, a largely off-road route.

Water sports

3.16 A number of harbours and launching sites along the coast allow for the enjoyment of a range of different water sports. There are harbours at Brancaster Staithe, Burnham Overy Staithe, Blakeney, Morston and Wells. Launching is also common from the concrete ramp at Sea Palling and off Weybourne and Cley beaches.

Sailing and Powerboating

3.17 There are a number of sailing schools along the wide expanse of coastline within the AONB:

- Blakeney Point Sailing School offers RYA training courses. The School is now focusing on powerboats and offers a number of tuition options from the harbour.

- Oceanus Sailing in Wells offers sailing and powerboat tuition.

- SailCraft Sea School is located on the edge of Brancaster Staithe harbour. The School offers private tuition and courses in sailing and power boating as well as providing equipment hire. The natural harbour at Brancaster Staithe provides sheltered waters ideal for many water sports.

- Sextant Marine offer a range of craft to hire, and also offer accompanied sailing either within the harbour at Blakeney Quay or offshore.

3.18 Other sailing/boating clubs include:

- Blakeney Sailing Club;
- Cley Boat Club;
- Brancaster Staithe Sailing Club;
- Burnham Overy Staithe Sailing Club; and
- Blakeney Harbour Sailing.

Canoeing

3.19 The north Norfolk coastline offers some sheltered estuary canoeing at Blakeney Point and Brancaster/Burnham Overy. However, according to the Norfolk Canoe Association, the tides and changing weather conditions can make these places dangerous for casual users.

3.20 Canoes are available for hire from Blakeney Point Sailing School and ‘canoe safaris’ can be arranged around Blakeney harbour.

Diving

3.21 Features such as the Rosalie shipwreck and numerous gullies attract divers to the offshore at Weybourne. For example, Sun Star Sub Aqua based in Ipswich visit this stretch of the coast annually contributing approximately 90 dives over a 3-day expedition.

3.22 North Norfolk Divers is a local scuba diving club with 50 members. Diving takes place from Weybourne most weekends April-October for wreck and sea life viewing.

3.23 “Shipwrecks off North Norfolk” by Stephen Holt lists over 150 shipwrecks between Hunstanton and Cromer available to divers. Learn Scuba offers a wide range of trips and holidays, which include boat and wreck diving off the north Norfolk coastline.

3.24 Dive operators include:

- Norfolk Dive Charters (Dive Boat Mayflower or Stream); and
- Dive Norfolk (Dive Boat Desert Moon).

Jet & Water Skiing

3.25 Jet skiing and Water Skiing are concentrated largely at Hunstanton in relation to this stretch of the Norfolk coast. To emphasise this point, Hunstanton recently played host to the World Water Skiing championships in June 2005. The waters of Wells harbour are also used for water skiing, with the Wells Water Ski Club based here.

3.26 Sea Palling is growing in popularity as a location for Jet Skiing. This is largely due to Beach Rock Leisure, a Jet Ski specialist that offers launch facilities. In recent years, Sea Palling has staged a Jet Sport Weekend attracting around 100 jet skiers to compete in a 100km course.

Fishing

3.27 There are shore, offshore and coarse fishing opportunities within the AONB. Norfolk Fishing Trips and Charter offer sea-fishing trips from Brancaster Staithe Harbour (see Attractions).

3.28 Large numbers of bass can occupy The Wash over the summer offering angling opportunities off the north-western stretches of the Norfolk Coast.

3.29 There are further prime fishing spots from Wells all the way round to Walcott. Weybourne is an especially popular fishing location, with reputedly excellent night fishing for Cod and Whiting in season and Mackerel and some Tope on calm summer days.

3.30 Shore fishing is concentrated to the east of Cley as the beaches west of Cley are not deemed as suitable. Off the shingle bank at Cley and Salthouse there is deep water inshore and there is said to be good sport available through both summer and winter. Cley was at one time known for producing specimen skate and thornbacks during late summer and early autumn, but recent years have shown a decline.

3.31 Coarse fishing is available at:

- Felbrigg Hall Lake: 5 acres for rudd and tench;
- Holkham Lake: carp and tench;
- Gimingham Lakes near Mundesley; and
- Letheringsett Lake.

Surfing

3.32 The Norfolk coastline has a growing reputation for its surfing opportunities, although the west of England, particularly the South West, is generally recognised for producing the best and safest swells.

3.33 Some of the prime surfing locations along the Norfolk coastline are reputedly to the north and north east, with beaches at Sheringham, Runton and Cromer all playing host to a small but growing number of surfers. Surfing is also suited to beaches further to the east, with Sea Palling another popular location.

Windsurfing

3.34 Windsurfing is common at Wells, though this activity is only available to permit holders. This costs £20 per year, and can be purchased at the Harbour Office or at the Beach Shop.

3.35 Northshore Sport and Leisure at Brancaster Staithe harbour offer discounted windsurf hire, clothing and equipment. Anecdotally, the store feels that windsurfing has declined in popularity along this section of the coastline.

Wind Sports

3.36 The coastal ridge on the North East coast allows the launch of hang gliders and paragliders. The last decade has seen the growth in popularity of kite surfing and kite buggying and the wide expanse of beach on the North West stretch of the coast allows for the enjoyment of this new sport.

Kiting, Kitesurfing and Kite Buggying

3.37 Hunstanton beach is very popular with all kite-based sports. It is the only westerly facing beach on this part of the eastern coastline. In 2001 and 2002 The Windfest British Kite Surfing Association Championships were held in Hunstanton.

3.38 Many sites within the AONB discourage kite surfing/buggying due to the perceived impact on breeding birds. This is the case at Blakeney Harbour which is in close proximity to Blakeney Point.

3.39 However, beaches between Heacham and Brancaster are popular with kite buggies and kitesurfing. The Hub (Heacham Up to Brancaster kitesurfing club) represents kitesurfers that use the beaches between Heacham and Brancaster. The stretch of coast from Old Hunstanton to Brancaster falls within the AONB and the Brancaster Commons Committee have made public kitesurfing guidelines which include a launch/landing zone west of Scolt Head Island to minimise impacts (see Section 6 in the main report).

Hang Gliding and Paragliding

3.40 Hang Gliding and Paragliding occurs largely on the coastal ridge between West Runton and Mundesley, with sections of the 26 miles of Coastal Ridge being prime launching sites.

3.41 The Norfolk Hang Gliding and Paragliding Club launch from West Runton and Mundesley. Hang gliders land on the beach but paragliders may land back on the ridge.

Other Land sports

Golf

3.42 There are 5 golf courses within the Norfolk Coast AONB:

- Royal West Norfolk Golf Club at Brancaster,
- Sheringham Golf Club (West of the town);
- Royal Cromer Golf Club (Between Cromer and Overstrand);
- Links Country Park Hotel (South of West Runton); and
- Hunstanton Golf Club (East of Old Hunstanton).

3.43 There are two further clubs located near to the AONB at Hunstanton and Mundesley.

Shooting

3.44 Game shooting is available during the shooting season, which runs from October 1st until February 1st. At least 20 landowners/farmers, with land mainly south of the A149, offer shoots once a week or once a fortnight during this time. Landowners advertise game shoots in shooting press such as The Field, Shooting Times and Country Life. Typically the cost of a shoot is £400-£600 per person based on a group of eight guns.

3.45 Holkham Estate has a long-standing history of game shooting. There are currently ten sold days available for teams of eight guns. The sold days include rough shoot days and driven shoot days.

3.46 Simulated Game Shooting is available at Thornham Hall Estate for parties of 8 or more.

3.47 The Wildfowlers of Thornham, Blakeney, Wolferton, Burnham Overy, Wells, Brancaster and Heacham comprise largely of local people rather than visitors.

Horse Riding

3.48 There are a number of suitable horse riding routes in the AONB. The Peddars Way enters the AONB East of Heacham and joins the Norfolk Coast Path at Holme. The Way follows an old Roman road that is suited to horse riding. At Holme horse riding is permitted on the beach but not on the dunes.

3.49 Horse riders use parts of the Norfolk Coast Path, at Holkham for example, where the path coincides with bridle paths. Further routes are available throughout the AONB but these tend to be less well advertised to visitors unless affiliated to a horse-riding centre.

3.50 The stables and riding schools in the AONB include:

- Weybourne Equestrian Centre;
- North Norfolk Riding Centre;
- Forest Lodge Riding Centre (Weybourne);
- Bridge Farm Stables (Gimmingham); and
- West Runton Riding Stables.

3.51 The West Runton Riding Stables is part of the Norfolk Shire Horse Centre and the Stables arrange hacking on a system of bridleways along the north Norfolk Coast.

Abseiling

3.52 Abseiling opportunities are restricted to indoor centres such as the Hill Top Outdoor Centre in Sheringham.

3.53 Camp Beaumont at Overstrand Hall also provides activity holidays for teenagers and offers climbing, abseiling and other land and water based activities. This is part of a school-focussed activity centre owned and operated by Kingswood, one of the largest outdoor education providers in the UK, and which has two sites along the Norfolk coast (West Runton and Overstrand).

Tourism Plant Overview

3.54 On the whole, the tourism product of the AONB is matched by a good mix of tourism plant and facilities. In particular, it is felt that:

- the level and mix and distribution of accommodation is appropriate given the nature and character of the tourism offer;
- there is a good level of activities for visitors to undertake, particularly in relation to some of the more popular activities such as walking, cycling, and fishing; and
- certain specialist activities are also catered for in relation to game shooting, canoeing/kayaking, and sailing, whilst there has been a growth in more adventurous activities such as power boating, kiting, kite buggying and kite surfing although in relatively small proportions.

Transport Service

3.55 Additional visitor amenities and services can have a bearing on the level of activities and enjoyment that can be undertaken within any given destination. Key amenities and services for visitors are explored further below.

Road Network

3.56 Whilst there is a current move that aims to divorce visitors from their car as much as possible, the process is not an easy one. Visitors may be persuaded to utilise other means of transport on certain days once at the destination, however the use of the car is still the main mode of transport used to travel to the area and is likely to continue to be the main mode of transport that visitors use to explore the wider area.

3.57 The main access roads into the AONB are:

- The A148 from King's Lynn to Fakenham (linking with the A1065) and Cromer. Through the A17 (Leicester) and A47 (Peterborough), King's Lynn provides the main travel route from the East Midlands via the A148;
- The A149 which leaves the A148 just outside of King's Lynn, travelling north to Hunstanton and along the coast; and
- The A140 from Norwich to Cromer via Aylsham. This road also provides the main access route to Norwich Airport to the north of the City.

3.58 The main roads with which visitors can travel around the AONB are:

- the A149, which is the Norfolk Coast Road. This links all of the main settlements along the Norfolk Coast corridor, namely Hunstanton, Holme, Brancaster, Burnham, Wells-next-the-Sea, Blakeney, Cley, and then eastward to Sheringham and Cromer;
- the B1159 continues the A149 Coast road from Cromer to Sea Palling via Mundesley, Bacton, and Happisburgh;
- the B1454, B1153, B1355, B1105, B1155, and B1156, leave the Coast road (A149) to head inland, reaching settlements such as Burnham Market and Langham before joining the A148 or other B-roads outside of the AONB; and
- Winterton Dunes is only accessible via minor roads.

3.59 The nature of both the A and B roads, which are all single carriage way, combined with slow moving traffic such as farming vehicles, cars towing caravans, haulage vehicles, etc, means that there is a perception that roads around the AONB can become easily congested at peak tourism times, and can be hazardous. These are explored further within the main report.

Public Transport

Coast Hopper

3.60 Norfolk Service 36, or the Coast Hopper, is the main bus route through the AONB, travelling between Cromer to King's Lynn, via East Runton, West Runton, Sheringham, Weybourne, Kelling, Salthouse, Cley, Blakeney, Morton, Stiffkey, and Wells-next-the-Sea. 12 services operates in total during the summer, 5-6 services operate to Hunstanton, with three continuing to King's Lynn.

3.61 The Coast Hopper Rover is valid for unlimited travel on the day of purchase between Hunstanton and Sheringham, costing £5.00 per adult and £3.00 per child.

3.62 The Coast Hopper Rover Plus, an extension of the Rover ticket, is also accepted on Norfolk Green Services X8 and X29; and Sanders Service 29. This costs £6.00 per adult and £4.00 per child.

3.63 In terms of usage, 2005 is likely to see patronage exceed 100,000 for the first time since the service began. On the whole it is felt that visitors rather than locals mostly use the service, with patronage increasing substantially during the peak tourism season. In the main, observations suggest that the service is coping with demand during busy periods, although standing room has been used and there are occasional reports of having to leave people behind because the service is full.

Other Bus Services

3.64 Other bus routes help to service the AONB area. However, the majority start at locations outside of the AONB, and finish at a specific point within the AONB, such as the X29 (Fakenham to Wells), Sanders Service 29 (Norwich to Wells), or the X8 (King's Lynn to Cromer, via High Kelling and Holt).

Rail Services

3.65 There are no direct mainline train services to a specific location within the AONB.

3.66 The Bittern Line travels from Norwich to Sheringham, with travellers then able to access the AONB via the Coast Hopper or the Norfolk Railway Poppyline.

3.67 Operated by 'one' train group, the service runs seven days per week between Norwich and Sheringham. The schedule runs approximately every hour between Monday and Saturday, with the first train from Norwich leaving just before six in the morning, and the first train to Norwich leaving Sheringham just after half past six. The last train back from Norwich leaves at 10:45 in the evening. Journey time between Norwich and Sheringham is about one hour. The Sunday service runs approximately every two hours between 9:15am and 6:45pm.

3.68 A trip from Norwich to Sheringham costs £5.00 return. Bikes can be taken on the trains at a cost of £1.00 return.

4 A4 - Market Context

4.1 Appendix 2 has highlighted the main tourism assets, appeal and plant within the Norfolk Coast AONB.

4.2 The following section aims to place this within the context of the main characteristics of visitors to the area. A comprehensive study into actual visitor characteristics and behaviours was conducted by the RSPB in 1999. Whilst this study is now slightly dated, it represents the only empirical study completed on the visitor market within the study area. It is for this reason that we have included a brief synopsis of the key findings study within this section of the report.

4.3 However, it should be noted that this study has a distinct and deliberate bias towards visitors to Nature Reserves, and is therefore not considered to be totally representative of the visitor market of the AONB. As such, Scott Wilson has endeavoured to investigate some of the characteristics and behaviours of other key markets to the Norfolk Coast AONB on a more generic level. These are also highlighted within this section of the report.

4.4 It is customary within this section to detail the composition of visitors with regards to: overnight domestic and overseas visitors; day visitors; people visiting friends and relatives (VFR); and other non-residents of the destination. This would normally include data on volume and value. However, as volume and value forms a significant part of our investigation into economic impact of visitors (see section 6 in the main report) to the AONB, it has been decided that this will be omitted from the following text to avoid repetition.

Generic Trends in the Holiday Market

4.5 The main emphasis of this section is to identify key trends in visitor markets that have a particular association with the key assets, attractions and activities available within North Norfolk.

4.6 Where relevant, comment is also provided on the likely future growth of the markets, the likely fit with the Norfolk Coast and any potential land-use implications. All trend figures are expressed in relation to ‘Cumulative Aggregate Growth Rate’ (CAGR), a standard method for averaging changes over time.

Domestic Trends

4.7 Tourism is an ever-evolving industry. Improved personal wealth, pressures on the work-life balance, increased mobility, and the sophistication of packaging and marketing are shifting consumer aspirations in terms of holiday destinations.

4.8 The key changes in tourism over the last 10 years include:

- growth in the level of long holiday trips taken abroad by the UK population, and an ever widening choice in overseas destinations;
- a consistent growth in the number of short break domestic trips (+9% CAGR), whilst the proportion of long holidays has remained consistent (+1% CAGR);
- a rise in visitor expenditure (+8% CAGR), driven by short breaks (+13% CAGR);
- a fall in the average visitor nights from 4 to 3 nights, as a consequence of the increase in short break trips; and

- a rise in the proportion of holidays specifically to pursue an activity (1.8% CAGR), driven solely by short breaks.

4.9 It is likely that this trend will continue over time, with even long haul destinations now becoming more affordable and easier to plan.

4.10 As a result, short breaks and second holidays are likely to become the predominant type of trip taken in the UK by the domestic market. However, the fact that the UK-based breaks are being increasingly motivated by activity participation or special interest visits presents new opportunities for UK destinations.

4.11 There is also a shift in expectations as the availability of good value and quality experiences become more commonplace, a consequence of increased exposure of visitors to both domestic and overseas destinations. Achieving consistently high standards in service delivery across all aspects of the tourism sector is vital in ensuring repeat and recommended visits, with visitors now more able to arbitrarily measure the quality of their experiences against different destinations.

Overseas Visitor Trends

4.12 The UK Inbound Tourism market is expected to increase, but it should be noted that these visits are sensitive to major global events.

4.13 According to the International Passenger Survey, whilst the overall number of visits from overseas tourists is increasing, albeit at a modest rate, the main growth has come from those visiting friends and relatives (6.9%CAGR), with business related trips growing steadily and holiday trips declining slightly since 1999.

Table 4.1

Changes in Overseas Visitors to the UK

	Trips (000's)			Spend (£m)		
	1999	2004	CAGR	1999	2004	CAGR
Holiday	9,826	9,275	*-1.1%*	4,251	4,218	*-0.2%*
Business	7,044	7,470	*2.2%*	3,967	3,682	*-1.5%*
VFR	5,640	7,891	*6.9%*	2,133	3,026	*7.2%*
Other	2884	3149	*1.8%*	2148	2122	*-0.2%*
Total	25,394	27,785	*1.8%*	12,499	13,048	*0.9%*

Source: IPS

4.14 The biggest growth areas are Europe (2.9%CAGR) and Asia (1.9%CAGR), though there have been comparatively large losses from Central and South America (-3.5% CAGR) and Japan and South Korea (-3.0%CAGR).

4.15 The more successful UK destinations in terms of attracting overseas visitors are those that have international access hubs (international airports and international ports); have a city of ‘world status’ (London, Manchester, Edinburgh); contain world heritage sites (Stonehenge, Hadrian’s Wall); contain iconic symbols or buildings that help define an area (London Eye, The Eden Project); or offer National Parks with prominence on a world scale (Lake Districts, Peak District). Whilst most regions have areas or pockets of interest that could be described as having a ‘world’ audience, the majority of the country is still relatively unexplored by overseas visitors.

4.16 Work is being done to promote the regions of England in terms of international marketing (VisitBritain) and from the main access points in an attempt to disperse overseas tourists further a-field. However, there is still a tendency for overseas visitors on a leisure holiday visit to gravitate towards those sites that offer a glimpse into the contemporary British culture and its main sites of heritage and history.

Norfolk Coast AONB Market Position

4.17 The audit of the tourism sector within the Norfolk Coast AONB demonstrates that the area can be classified as a destination in its own right.

4.18 As previously highlighted, it is the attractiveness of the natural landscape and its villages, coupled with the peace and tranquillity afforded to people who stay within the area that creates the appeal for people to specifically choose to visit the AONB.

4.19 The AONB, through its special importance with regards to wildlife and birds, also has a strong association with a growing ‘wildlife’ motivated tourist. In addition, access to the coast, availability of wide sandy beaches, and prevailing weather conditions means that the area is growing in its reputation for certain adventure outdoor recreational activities.

4.20 On the basis of the audit, we have investigated some of the characteristics of these markets further. The following highlights:

- the main findings from the RSPB visitor survey conducted as part of the ‘Valuing the Norfolk Coast’;
- the key visitor markets, their behaviours and characteristics, and how this relates to the Norfolk Coast AONB; and
- special commentary on owners of second properties within the Norfolk Coast, and how their behaviours differ from holidaymakers.

Norfolk Coast Visitor Characteristics Research – RSPB 1999

4.21 The most recent visitor research, in relation to this area of the Norfolk coast, was conducted 1999 as part of the RSPB’s study to define the economic benefits of environmental and wildlife tourism. The study area covers the stretch of coastline from Snettisham in the west to Weybourne, which is fairly central within the Norfolk Coast AONB. However, it does not include any of the AONB area to the east of Weybourne, the eastern outlier, or south of Snettisham, all of which amounts to a large proportion of the AONB designation.

4.22 Also, the sampling points, Blakeney, Cley, Holkham, Morston, Snettisham, and Titchwell, have a specific and deliberate bias towards visitors of Nature Reserves. Therefore, the following analysis should be regarded as providing information on a sub-section of the AONB visitor market only and not representative of all tourists.

4.23 The visitor survey element of the research was administered during August and October at all of the key Nature Reserve sites within the AONB. A total of 1,759 questionnaires were completed, with the actual party composition of the respondent equalling 5,076 visitors.

4.24 The key findings from the survey are as follows.

- The average party composition tends to have between 2 and 3 adults per group (2.3), but less than one child (0.9).
- The majority of the visitors arrive to the site by car (92%). Less than 1% arrived by public transport, though 5% walked and just over 1% cycled.

- Nearly half (46%) of visitors were on holiday within the study area, and just over a quarter (28%) were on a day trip from home. A further fifth (22%) were on a holiday outside of the area, and are therefore classified as holiday day-trippers. Just 4% were local residents.

- The average length of stay of holiday makers was 6.2 nights, with the length of stay higher in August (6.8 nights) than October (5.5 nights), but in both instances visitors tended to be long-holiday makers.

- The majority of overnight visitors stayed in commercial accommodation, with just 5% using accommodation supplied by friends and relatives. Over a third (37%) used serviced accommodation, with a further third (31%) using self-catering accommodation. Just over one in ten stayed in static caravans (13%) and touring pitches (12%) respectively.

- The combination of the wildlife (59%), scenery/landscape (58%), peace and tranquillity (47%) and beaches (39%) provide the main influences on the decision to visit the study area; though the wildlife alone provided the main reason for visiting for a third of visitors (34%). Bird and wildlife watching were particularly strong influences for people surveyed at Cley (75%) and Titchwell (63%).

- As a result, bird watching provides the main activity undertaken by visitors (33%), though the same proportion also undertook walking as the main activity. Over three-quarters (77%) of visitors participated in walking overall, whilst six in every ten went bird-watching.

- The main spend categories are accommodation (43% of spend), food and drink (30%) and travel and petrol (11%). Only 4% was spent on entry fees to attractions, with a further 7% spent on shopping.

- Key likes about the area from respondents included the peace and tranquillity, the scenery and landscape, the pace of life, and the birds and wildlife, suggesting that they view the area as a place to getaway from the stresses and strains of their lives.

- Key dislikes about the area predominantly concerned the lack of facilities (toilets), parking (including high charges), traffic issues, and increasing numbers of visitors.

Key Markets

Traditional Seaside

4.25 The lure of the coast for traditional ‘bucket and spade’ and bathing activities still has a large appeal to the UK domestic market, as can be noted by the large increase in tourism volume during the school holiday period, bank holidays and weekends across all of the coastal resorts.

4.26 The specific appeal of the AONB costal beaches is that they offer a higher quality of landscape setting, vast sandy beaches which stretch for miles, and which in turn provides a sense of ‘escapism’, particularly in comparison to the resort areas surrounding the AONB.

4.27 Despite this ‘escapism’ perception, these beaches attract high volumes of visitors, and it is this aspect that generates some of the tension between the visitor economy and the conservation/protection ideals of this sensitive coastline.

Culture and Sightseeing

4.28 The attractions within the north of Norfolk are predominantly small scale, and dominated by Museums, Parks and Gardens, and Nature Reserves.

4.29 With a few exceptions (most notably Sandringham House), the attractions within the area do not generally represent a key reason for visiting the area, especially viewed on an individual basis.

4.30 However, when viewed collectively and when combined with other attractions in the wider area, there are several distinct attraction themes that communally could be utilised to offer a stronger attractions base. These themes include:

- Heritage railway – NNR Poppyline, Wells & Walsingham Railway, Barton House Railway (Broadland) and Bure Valley Railway (Broadland);
- Stately Houses/Estates – Holkham Hall & Estate, Blickling Hall, Wolterton Hall & Park, Felbrigg Hall and Sandringham House (West Norfolk), Houghton Hall (West Norfolk), Norwich Castle (Norwich);
- Gardens & Parks - Holkham Estate, East Ruston Old Vicarage, Hoveton Hall Gardens, Mannington Gardens, Priory Maze & Gardens, Sheringham Park & Gardens; and
- Festivals and special events – the Cromer and Sheringham festivals tend to be the largest within the area, though a range of other festivals are presented to visitors throughout the year.

4.31 The development of these themes would certainly help diversify the overall tourism product, and perhaps promote the culture and sightseeing aspects of the area as a main, rather than supplementary reason for visiting.

Activity Market Prospects

4.32 The specialist interest and activity market is a particular growth area in tourism across the UK. In 2003, 22.7million holiday trips were made which were specifically related to an activity (i.e. the activity was the main reason for the trip), up from 14million in 1997.

4.33 The broad definition of activities includes shopping, visiting attractions, land-based sports, water sports, fishing, and other informal and formal recreational activities.

4.34 The characteristics of the market are not easy to classify due to the different levels of activities and interests included in the definition. For example:

- those involving adventure activities (climbing, caving, pot holing, scuba diving) tend to be younger, spend less per night, are taken on an independent basis, and are more likely to stay in low cost accommodation; whilst
- those involving sailing, riding and golf are more likely to appeal to the AB social class, with higher levels of disposable income and a higher propensity to stay in higher cost accommodation (possibly with the activity on site in the case of golf).

4.35 In addition, whilst activity and special interest based holidays tend to involve shorter stays at a destination (1-3 nights), the market also tends to be slightly higher spending compared to longer visits. This is a result of the markets' desire to undertake an interest in which they know they will have a great experience, but also the realisation that this activity needs to be undertaken within a condensed time period.

4.36 There is still a positive outlook for activity-based holidays, with people becoming less interested in purely sun related holidays and more interested in pursuing interests and activities.

Activities Market within the Norfolk Coast AONB

4.37 The overall offer of the Norfolk Coast AONB does cater for elements of the activity market already, with the main pursuits outlined below.

4.38 It should be noted that as new innovations in technology are made, activities are becoming safer, less specialised and open to wider audiences. Therefore, it is likely that there will be greater market demand in the future.

Walking

4.39 Walking is the main activity undertaken by visitors whilst at a destination, either as a prime motivation behind a trip (5%) or as an activity undertaken once at a destination (71%). Moreover, it is a lucrative sector with an estimated 527million walking trips made annually to the countryside nationwide generating £6.14billion in associated spend (Ramblers Association).

4.40 The Norfolk Coast is not a renowned destination for walking, and the Norfolk Coast Path for example does not have the same connotations as the South West Coast Path in being a prime reason for attracting visits. However, strides are being made to develop opportunities for walking within the area, and the Norfolk Coast Partnership have had a key role to play in the development of the Norfolk Coast Path/Peddars Way, and further circular walks in and around the main settlement areas.

4.41 The value of walking provision is that it can be undertaken by all, even those with disabilities along sympathetically designed routes; it can help raise the profile of some of the lesser known attractions and assets; it encourages more sustainable movement, especially in areas of high sensitivity; and it can spread the benefits of tourism to less frequented areas. All of these elements have been highlighted as objectives of the Norfolk Coast Partnership with regards to visitor management.

4.42 There is capacity to expand the walking product across the northern reaches of Norfolk, though the prime motivation behind the walk may not be the walk itself, but rather could be associated with key attractions and features of interest. However, it will be important to ensure that the routes allow sympathetic movement of visitors and that the presence of walkers does not cause damage to the sensitive ecosystems and habitats within the AONB. Expanding walking routes between villages within the Norfolk Coast AONB, and connecting some of the more robust areas of the AONB to the resort areas should also be explored.

Cycling

4.43 Cycling as an activity is growing in popularity across a broad range of groups. As with other areas of Norfolk, the advantage of this activity within the Norfolk Coast is that the environment topography is fairly gentle and therefore lends itself to a more general cycling market, not least amongst families.

4.44 A key requirement for cyclists is the availability of relatively traffic free routes that incorporate features of interest and stop-off points that allow them to rest, recuperate and refresh themselves. In this respect, the AONB is said to have over 350-miles of cycle routes, including off-road routes. The Norfolk Coast Partnership has been instrumental in developing the ‘Quiet Lanes’ initiative in particular, which has been piloted in the area of the AONB south of Cromer.

4.45 With the pleasant and undemanding terrain of the Norfolk Coast AONB interspersed with villages, countryside pubs, and both natural (coast, rivers, and vantage points) and built features (churches, windmills, stately homes and country parks) of interest, cycling within the AONB has further development potential.

4.46 Moreover, cycling presents a key opportunity for developing more sustainable tourism within the AONB. In our view, there is a definite synergy between cycling and the environmental assets and appeal; routes can be developed to be a mix of undemanding to moderately demanding to cater for a range of abilities; whilst promoting the use of this more sustainable form of exploring the AONB. However, this will need investment in suitable infrastructure and services.

Outdoor Sports

4.47 The Norfolk Coast appears to be a growing hub for outdoor sports, including the more adventurous land and water based activities. This is a real growth market within the UK, with several key factors helping to push more of the domestic market towards activity-based travel. This includes:

- the cost of participation, which for the majority of sports is decreasing in real terms;
- people are seeking more 'fun' and specialised interest pursuits to counter-balance the stresses and strains of work;
- likewise, outdoor sporting pursuits are being promoted as a means of 'enjoying the outdoors', and healthy living, and as a means of encouraging people to leave their 'armchairs'; and
- the number of activities themselves are growing, meaning that there is generally some form of activity to suit most peoples preferences.

4.48 In relation to the Norfolk Coast AONB, this has manifested itself in the occurrence, and now growth, of new activities such as:

- micro-lighting and paragliding, with flying over the natural coastal landscapes of particular appeal;
- power kiting, kite buggies, and kite surfing, with the wide beach expanses combined with brisk off-shore winds of the coast being a key driver behind the growth of these activities;
- surfing and windsurfing, with the whole of the Norfolk coast growing in stature in relation to the quality of the swells and wind offered respectively; and
- Jet skiing and power boating, especially around Hunstanton and adjacent to the eastern outlier.

4.49 Anecdotal evidence provided by local businesses suggest that kite surfing is overtaking windsurfing as a sport along the coast, with particular hot spots being from Hunstanton to Brancaster. The peak is estimated to be 40 kite surfers at any one time at Hunstanton, which is the most popular location because of the tide. However, this volume is said to be almost at saturation point with a roughly similar proportion of people leaving the sport as joining the sport, primarily because of the dangers involved. Other sports that are increasing in popularity include kayaking/canoeing, and power boating.

4.50 These are in addition to some of the more mainstream outdoor activities such as golfing trips; sailing; fishing; and shooting and hunting; all of which are popular pastimes.

4.51 Overall, the promotion of these activities tends to raise the profile of destinations amongst all activity enthusiasts. This is because activity pursuers tend to look at a destination in terms of the range or package of activities available rather than just looking at one specific activity that may be on offer.

Shopping

4.52 Shopping is a popular activity that is usually undertaken whilst at a destination, with nearly three-quarters (64%) of all tourism trips involving an outing to the shops. The value of shopping is that it provides a direct interface between visitors and local business and their employees.

4.53 Holt, on the southern outskirts of the AONB represents the main focus for specialist shopping within the area. The presence of speciality shops and a lack of standard high street brand names, combined with the streets lined with well preserved Georgian buildings provides visitors to Holt with a fairly unique shopping experience, not just in the context of Norfolk but for the whole of the East of England region.

4.54 Other concentrations for tourism-related shopping include the resort areas of Cromer, Sheringham, Wells and Hunstanton.

4.55 The Norfolk Coast Partnership has been instrumental in the promotion of local products to the visitor market, and ensuring that local producers benefit from the visitor economy. 44 local producers appear on the Partnerships ‘local products directory’, with products ranging from organic eggs, meat and poultry; to fresh crabs and lobsters; to asparagus and strawberries; to cheeses, to smoked kippers; to locally produced alcoholic beverages (beers and cider).

4.56 The ‘local’ emphasis of shopping and produce is an aspect of tourism that has gained an increasing focus in recent times. This is because local produce can help drive the distinctiveness of the area by providing a tangible sense of place. Produce that can be claimed to be unique to the area has been known to spark specific recall to specific areas (Cumberland Sausages; Wensleydale Cheese; Cornish Pasty), and even towns and villages (Cheddar Cheese; Melton Mowbray Pies).

4.57 Traditionally, Norfolk has a strong association with food production, although large food manufacturing companies have arguably devalued this association. Nevertheless, Norfolk as a whole has the potential to reinstate the region as a producer of fine foods; promotion to tourists once at the destination is a significant way to ensure that this message is received. The Norfolk Coast AONB, with its association with fishing in particular, certainly has a key role to play.

4.58 A further benefit includes greater distribution of the visitor economy to help support other local, non-tourism businesses.

Nature & Wildlife Prospects

4.59 Wildlife and nature based tourism is growing in popularity, a result of growing public concern over the environment; an associated interest in wildlife and habitats; and an increasing awareness of the sensitivities of nature. Further evidence of this growth in interest is provided by an increase of television programming dedicated to nature and wildlife, including the live ‘Springwatch’ series staring Bill Oddie which discusses and discovers nature and wildlife across the UK and provides advice on how to determine and promote habitats on the doorsteps of everyone. The series aired in 2005 regularly attracted viewing figures in excess of 3.3 million.

4.60 As an example of this growing interest in the UK, Scotland now has a clearly defined wildlife tourism market within the ‘Highlands and Islands’. The research conducted into this market niche identified three core activities under the wildlife banner:

- Visiting bird and animal sanctuaries – visits to established Nature Reserves and/or managed wildlife centres;
- Bird watching – the identification and study of birds within their natural habitats; and
- Watching marine wildlife – including the watching and studying of seabirds, seals, cetaceans, and other water-based wildlife.

4.61 A visitor survey on this Market in the Highlands and Islands area revealed that wildlife tourists are:

- Slightly more likely to be male (56%),
- Predominantly aged over 34 (83%), and
- From the ABC1 socio-economic grouping (68%).

4.62 Whilst wildlife may be the main motivation behind a visit, visitors were also prone to undertake other activities such as visiting heritage attractions, walking/rambling or visiting archaeological sites.

4.63 Overall, the report expects the market to continue to grow, with further evidence provided by a MORI survey suggesting that Birdwatching is the fastest growing outdoor pastime with over two million birdwatchers in the UK alone.

Wildlife Tourism in North Norfolk

4.64 With consumer interest forecast to grow in this sector, it is likely that the Norfolk Coast, which is renowned for its birdwatching opportunities due to its designation as a wildfowl protected area, will come under greater pressure from this type of activity.

4.65 To emphasise the importance of the Norfolk Coast from a birdwatching perspective, it should be recognised that Titchwell is the premier RSPB visitor centre in the whole of the UK, attracting well over 100,000 visitors per year.

4.66 This niche market does have benefits in that it tends to attract visitors outside of the traditional peak season, with different seasons being the trigger for particular events or happenings, such as the in and out migration of different species of birds for example. Therefore, nature tourism could help to extend the benefits of tourism beyond the more traditional summer months.

4.67 There are also financial benefits from this type of visitor if business enterprises can be encouraged to adopt more sustainable/wildlife friendly practices. As part of a more general research exercise, it was discovered that 80% of British travellers are prepared to pay £30-£70 extra per fortnight to book a hotel with a responsible environmental attitude. This demonstrates that cost is potentially decreasing as an inhibiting factor in visitors' search for sustainable tourism ideals and an eco-tourism style product.

4.68 There is also a large educational role for nature tourism, with school interest in nature ever present with courses such as biology and environmental studies being present within the curricular of key stages, GCSE, A Level and degree courses. The National Trust, through its residential centre at Brancaster, already exploits this link.

4.69 However, as is discussed in the main report, these sites by their very nature are susceptible to damage through visitor presence. Therefore, the continued use of these sites for the benefit of tourism needs to be balanced against the effectiveness with which these sensitive habitats can be protected from damage caused by visitor pressure.

Special Commentary: Owned Accommodation Visitor Characteristics

4.70 Our investigations into the composition of the visitor accommodation within the Norfolk Coast AONB suggest that a high volume of visitors that are classified as 'tourists' actually own a property within the Norfolk Coast AONB.

4.71 As a rule, these types of visitors are included within the tourism definition and thus form part of visitor economic impact studies.

4.72 However, it is important to recognise that the second home ownership market has distinct differences to the traditional type of tourism visitors. In particular:

- The motivations behind a trip will be different to actual holidaymakers in that the use of the accommodation and ensuring that they make the most of their investment will be a critical influence, rather than discovery, sightseeing, and/or activities.

- These visitors, again because of their investment, will be regular visitors and thus will not have the same propensity to explore the area, visit attractions and/or use retail and catering facilities.

- A consequence of ownership and the fact that they have committed a substantial financial undertaking is that their relationship with the area will change. To reinforce this, owners are required to make certain financial contributions on a regular/annual basis – land rental and service charges in the case of static caravan owners, and local council taxes in the case of second home houses.

4.73 The following section highlights some of the unique characteristics of owners of property classified as ‘holiday’ or ‘second’ homes.

Static Unit Owner Characteristics

4.74 Altogether, 80% of static unit provision within the Norfolk Coast AONB is actually owned for private rather than letting purposes. This equates to 2,580 units, which is a substantial proportion of available visitor accommodation within the area.

4.75 Although there is currently no specific report detailing the characteristics of static owners within the AONB, a recent study has been completed in Wales that looks at the differences between static caravan owners and visitors who rent static caravans. The key findings of the study are as follows:

- Static owners are much more likely to be ABC1 and aged 55+, with the quality of the park and the surrounding countryside being key drivers behind purchasing.
- Owners have a high propensity for repeat visits, with half of owners (49%) suggesting that they use the caravan almost every week, with further third (31%) using the site once or twice every month. Furthermore, 97% of owners state that friends and family use the caravan at least two to three times a year. However, a high volume of these trips are short breaks, or secondary holidays with the main holiday generally being taken elsewhere, typically abroad.
- The overall spend of owners (£243) is much less than renters (£838) of static caravans on a one-trip comparison. Even excluding accommodation, renters (£487) spend approximately 50% more than owners (£230). However, please note this comparison does not take into account the cumulative contribution of owners.
- Owners spend a lower proportion of their overall spend (39%) off-park in comparison to visitors who rent static accommodation (48%).
- Over a third (35%) of owners bring food with them, resulting in a relatively small amount of spend on groceries within the area (33%) of total.
- Whilst renters actually have a lower propensity to spend money on groceries (23% of trip budget), this group spends the much of the difference (c.8-10%) on meals and drinks out (42% of budget).
- Almost half of owners spent money on a major purchase at the destination, with items including TVs (41%), microwaves (20%), fridge/freezer (20%), videos/dvds (20%), patio/garden furniture (13%), and a three-piece suite (13%).

4.76 Generic terms for the types of occupancy and usage of owner caravans has been defined as follows:

- Weekenders – owners who come down every weekend or every other weekend. Even with parks with facilities, these owners prefer to stay in or outside their caravan holiday home rather than use other facilities. These owners tend to come less often during high season, preferring instead to let grown up children and families use their home during this time.

- Rarely-seens – owners who appear infrequently, using their vans on just one or two occasions each year. Managers felt that these owners took a lot of other holidays, and many were taken abroad.

- Stay-puts – owners who stay in the caravan holiday home for the full time the park is open. They are usually retired couples that have sold their house, and now use their caravan holiday home as their main home. During the time the park is shut (around 6 weeks) they holiday abroad.

4.77 Please note that we have been unable to source any research that details the characteristics of owners of a second house or flat for private purposes. However, it is likely there will be certain shared characteristics with static unit owners. Indeed, one of the key findings of the study is that one of the prime motivations behind purchasing a static property was that it offered a more cost-effective solution to buying a 'second home' than the purchase of a house or flat.

Day Visitor Catchment Calculations

4.78 The day visit market is dependent upon the drive-time catchment characteristics.

4.79 For the purpose of this study, the drivetime has been calculated using three points in order to reflect the full breadth of the Norfolk Coast AONB, namely Hunstanton, Cromer and Waxham. The drivetime has been measured using 30-minute, 60-minute and 120-minute timelines to the total population catchment for the AONB. The population is based on an approximation of the County coverage.

4.80 As table 4.2 demonstrates, the population catchment within a 30-minute drivetime is 176,000. This equates to just over half of the population of the three districts that the Norfolk Coast AONB covers (314,000 in total), with a large proportion (40,302) residents of the AONB itself. This relatively low catchment is a reflection of the road systems in and around these areas, with all being single carriageway A and B roads. There are currently no main trunk roads north of King's Lynn.

Table 4.2

Drivetime Catchment Population – Points = Hunstanton, Cromer & Waxham

	Total	120mins		60mins		30mins	
County		% of County	Population	% of County	Population	% of County	Population
Norfolk	803,000	100%	803,000	95%	762,850	22%	176,660
Suffolk	672,000	100%	672,000	6%	40,320		
Cambridgeshire	558,000	100%	558,000				
Peterborough	158,000	100%	158,000				
Lincolnshire	658,000	48%	315,840				
Essex	675,000	35%	236,250				
Northamptonshire	638,000	5%	31,900				
Leicestershire	615,000	4%	24,600				
Total	4,777,000		2,799,590		803,170		176,660

Source: Scott Wilson

4.81 To act as a comparison, Scott Wilson recently undertook a catchment survey for a Visitor Centre in Leicestershire. The 30-minute drivetime for this centre equated to 788,000 population catchment, which is around 4-times above the catchment for the Norfolk Coast.

4.82 The 60-minute drivetime catchment includes virtually all of Norfolk, and the main population centres of Norwich (122,000), Great Yarmouth (92,000) and a large proportion of King's Lynn (137,000). As a result, the population catchment increases to over 800,000. Again, the Leicestershire comparison provides a catchment of 4.9 million within the same length of drive, over 6-times the catchment of the AONB.

4.83 The population within a two-hour drivetime, however, increases to over 2.7million. This is largely due to the major trunk road network that links Norwich to Cambridge (A11, A14), Peterborough (A47) and Ipswich (A140, A14).

4.84 A key characteristic of the drivetime population is the proportion that are pensionable age or over. This is particularly high for North Norfolk where 3 in every 10 (29.3%) are of retirement age. King's Lynn & West Norfolk (24.6%) and Great Yarmouth (22.7%) have slightly lower percentages of residents of pensionable age, as does Norfolk (23.1%) and Suffolk (21.3%) as a whole. However, they are all higher than the national average of 18.4% of residents who are 65% or over.

5 A5 - Economic Impact Assessment Calculations

5.1 It has been beyond the scope of this study to complete a totally new economic impact assessment utilising either the Cambridge Model or the STEAM Model, which are the industry standard models for measuring economic impacts. This was not a pre-requisite of this study, with the Norfolk Coast Partnership, along with other AONB organisations, seeking to commission a more comprehensive economic impact assessment in the near future.

5.2 However, to ensure that all of the impacts of tourism could be taken into consideration using a balanced approach, Scott Wilson agreed to review existing studies detailing the volume and value of tourism within the districts of King's Lynn & West Norfolk, North Norfolk, and Great Yarmouth (as conducted by the EETB) with a view to transposing this information onto the Norfolk Coast AONB. This assessment is only supposed to act as a guide.

5.3 However, during the investigation process, it became obvious that the base data used to calculate the figures for the three districts contained certain inaccuracies, including incorrect accommodation assumptions. Also, the volume and value figures for the day visitor market when transposed onto the AONB would appear to be unrealistically high, particularly in comparison to the RSPB assessment.

5.4 As a result, Scott Wilson created its own base model to generate a more appropriate estimate to the volume and value of tourism to the Norfolk Coast AONB. This model has broken down the assumptions used for the EETB's Economic Impact Assessments of the three districts, and then fed these assumptions into our knowledge with regards to accommodation stock, and tourism day visitor value.

5.5 The assumptions have been worked through within the main report. However, tables 5.1 and 5.2 highlight the key calculations within our model. Table 5.1 breaks the EETB assessments into its base components. Table 5.2 applies this to the AONB to generate the volume, value, and economic impact assessment of tourism within the Norfolk Coast.

5.6 **To reiterate, please use all the calculations and figures provided with a strong degree of caution.** We have attempted to allow for all discrepancies and idiosyncrasies (Visiting Friends and Relatives market; differences between overseas and domestic visitor characteristics; and Second Home Owners) as much as possible within our calculations. Therefore, we believe that this figures generated provide the most accurate estimate of both the volume and value of visitors to the Norfolk Coast. However, there may still be certain inaccuracies that we have been unable to make sufficient allowances for. **Therefore, please treat the information as indicative only.**

5.7 **THIS ASSESSMENT SHOULD NOT BE REGARDED AS AN OFFICIAL ECONOMIC IMPACT ASSESSMENT FOR THE NORFOLK COAST AONB.**

5.8 **Scott Wilson cannot be held responsible for the subsequent use and interpretation of this data, and any decisions made therein.**

TABLE 5.1 - 2003 ECONOMIC IMPACT ASSESSMENTS - BASE COMPONENTS

	Area - Km2	Population
N. Norfolk	965.46	99800
W. Norfolk	1428.76	139100
Great Yarmouth	173.98	92,240
Total for Area	2568.2	331140

ACCOMMODATION STOCK

	Serviced Bedspaces	Self catering Units	Touring caravans/tent Pitches	Holiday Park/Static Units	Group Bedspaces	Second home Units	Marina Berths
N. Norfolk	3793	939	5025	158	372	2528	0
W. Norfolk	4073	1045	2032	0	150	1331	0
Great Yarmouth	5465	600	4167	12601	40	141	70
Total for Area	**13331**	**2584**	**11224**	**12759**	**562**	**4000**	**70**

ECONOMIC ASSESSMENT - BASE COMPONENTS

OVERNIGHT VISITS

	Domestic Overnight Volume	Overseas Overnight Volume	Total Overnight	Domestic Overnight Nights	Overseas Overnight Nights	Total Nights	Domestic Overnight Value	Overseas Overnight Value	Total Overnight Value
N. Norfolk	900,000	59,700	959,700	3,485,000	425,000	3,910,000	£114,631,000	£18,981,000	£133,612,000
W. Norfolk	801,000	64,700	865,700	3,005,000	450,000	3,455,000	£113,402,000	£20,784,000	£134,186,000
Great Yarmouth	1,274,000	55,100	1,329,100	4,703,000	365,000	5,068,000	£203,416,000	£18,483,000	£221,899,000
Total for Area	**2,975,000**	**179,500**	**3,154,500**	**11,193,000**	**1,240,000**	**12,433,000**	**431,449,000**	**58,248,000**	**£489,697,000**

	Domestic			Overseas		
	Av. Spend Per Trip	Av Spend Per Night	Average Duration	Av. Spend Per Trip	Av Spend Per Night	Average Duration
N. Norfolk	£127.37	£32.89	3.9	£317.94	£44.66	7.1
W. Norfolk	£141.58	£37.74	3.8	£321.24	£46.19	7.0
Great Yarmouth	£159.67	£43.25	3.7	£335.44	£50.64	6.6
Total for Area	**£145.02**	**£38.55**	**3.8**	**£324.50**	**£46.97**	**6.9**

TOURISM DAY VISITS

Tourism Only Day Visitor Volume	Day Visitor Value	Day Visitor Spend Per Trip
3,847,788	£100,581,190	£26.14
3,155,100	£81,937,947	£25.97
111,360	£2,969,971	£26.67
7,114,248	**£ 185,489,108.28**	**£26.07**

Volume & Value

Total Volume	Total Value
4,807,488	£234,193,190
4,020,800	£216,123,947
1,440,460	£224,868,971
10,268,748	**£675,186,108**

Economic Impact

Direct Spend (Adjusted)	Direct Spend Adjustment?	Supplier & Induced Income	As a % of Direct Spend	Total Economic Value
£240,090,379	-2.52%	£46,487,260	19%	**£286,577,639**
£220,692,808	-2.11%	£78,028,262	35%	**£298,721,070**
£232,170,030	-3.25%	£82,478,123	36%	**£314,648,153**
£692,953,217		**£206,993,644**		**£899,946,861**

Jobs Created

FTE Directly Supported	FTE Indirect/induced	Total FTE's	Actuals Directly Supported	Actuals Indirect/induced	Total Actuals
3256	1640	**4896**	5170	1723	**9995**
3151	1300	**4451**	4601	1483	**10992**
3245	1718	**4963**	4748	1567	**8444**
9651	4659	**14310**	14519	4773	**29431**

Spend needed to support jobs

Spend to Support FTE Direct Jobs	Spend to Support FTE Indirect/induced	Spend to Support Actual Direct Jobs	Spend to Support Actual Indirect/induced
£73,740.77	£28,342.86	£46,438.95	£26,975.09
£70,049.37	£60,013.62	£47,963.55	£52,621.13
£71,555.89	£47,997.39	£48,902.35	£52,648.21

TABLE 5.2 - SCOTT WILSON'S ECONOMIC ASSESEMENT OF TOURISM IN THE NORFOLK COAST

	Area - Km2	%	Population	No of Houses
N. Norfolk	242.33	25%	21956.00	
W. Norfolk	203.60	14%	15579.20	
Great Yarmouth	7.1	4%	2767.2	
Total for Area	453.1	18%	40302.4	18280

ACCOMMODATION STOCK

	Serviced Bedspaces	Self catering Units	Touring caravans/tent Pitches	Holiday Park/Static Units	Statics Actual - Owned	Statics Actual- Let	Group Bedspaces	Second home Units	Marina Berths
N. Norfolk	1565	385	1690	2453	1962	491	372	1320	
W. Norfolk	1187	290	926	748	598	150	150	695	
Great Yarmouth	77	18	208	25	20	5	0	14	
Total for Area	**2829**	**693**	**2824**	**3226**	**2580.8**	**645.2**	**522**	**2088**	

ECONOMIC ASSESSMENT - BASE COMPONENTS

OVERNIGHT VISITS

	Total Overnight Visitors	Total Nights	Total Overnight Value	**VFR Visits**	**VFR Spend**	**Tourism Spend**
N. Norfolk	292,669	1,170,653	£ 39,467,271.50	12,174	£668,266.80	£ 67,795,365.57
W. Norfolk	162,386	626,516	£ 21,048,560.41	16,968	£925,364.51	£ 44,506,860.34
Great Yarmouth	16,984	63,825	£ 2,779,459.77	11,252	£630,167.60	£ 4,226,369.45
Total for Area	**472,039**	**1,860,994**	**£63,295,292**	**40,393**	**£2,223,798.91**	**£ 116,528,595.37**

TOURISM DAY VISITS

Day Visitor Volume	Day Visitor Value
1,058,142	£ 27,659,827.27
867,653	£ 22,532,935.43
30,624	£ 816,742.08
1,956,418	**£ 51,009,505**

Static Owners - Nights	Static Owners - Visits	Static Owners - Spend	Rental & Charges	Total Static Value
547,117	141,293	£ 4,103,378.40	£ 2,747,360.00	£ 6,850,738.40
161,635	43,085	£ 1,212,264.27	£ 837,760.00	£ 2,050,024.27
5,316	1,440	£ 39,868.45	£ 28,000.00	£ 67,868.45
714,068	**185,818**	**£ 5,355,511.12**	**£ 3,613,120.00**	**£ 8,968,631.12**

Second Home Owners - Nights	Second Home Owners - Visits	Second Home Owners - Spend	Council Tax	**Second Home Value**
367,909	95,012	£ 3,679,089.41	£ 1,187,654.40	**£ 4,866,743.81**
187,669	50,024	£ 1,876,692.05	£ 625,303.80	**£ 2,501,995.85**
3,748	1,015	£ 37,476.34	£ 12,690.00	**£ 50,166.34**
559,326	**146,052**	**£ 5,593,257.80**	**£ 1,825,648.20**	**£ 7,418,906.00**

Volume & Value

Total Overnight Value	**VFR Spend**	Day Visitor Value	Second Property Owners	Total Value of the Visitor Economy
£ 39,467,271.50	£668,266.80	£ 27,659,827.27	£ 11,717,482.21	£ 79,512,847.78
£ 21,048,560.41	£925,364.51	£ 22,532,935.43	£ 4,552,020.12	£ 49,058,880.47
£ 2,779,459.77	£630,167.60	£ 816,742.08	£ 118,034.78	£ 4,344,404.24
£63,295,292	**£2,223,798.91**	**£ 51,009,505**	**£ 16,387,537.12**	**£ 132,916,132.48**

Economic Impact

Direct Spend (Adjusted)	Direct Spend Adjustment?	Supplier & Induced Income	As a % of Direct Spend	**Total Economic Value**
£77,510,645	-2.52%	£15,007,921	19%	**£92,518,566**
£48,021,776	-2.11%	£16,978,603	35%	**£65,000,379**
£4,203,350	-3.25%	£1,493,235	36%	**£5,696,585**
£129,735,770		**£33,479,760**		**£163,215,530**

Jobs Created

FTE Directly Supported	**FTE Indirect/induced**	**Total FTE's**	**Actuals Directly Supported**	**Actuals Indirect/induced**	**Total Actuals**
1051	530	1581	1669	556	2225
686	283	968	1001	323	1324
59	31	90	86	28	114
1795	**844**	**2639**	**2756**	**907**	**3664**

Spend needed to support jobs

Spend to Support FTE Direct Jobs	Spend to Support FTE Indirect/induced	Spend to Support Actual Direct Jobs	Spend to Support Actual Indirect/induced
£73,740.77	£28,342.86	£46,438.95	£26,975.09
£70,049.37	£60,013.62	£47,963.55	£52,621.13
£71,555.89	£47,997.39	£48,902.35	£52,648.21

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Norfolk Coast
Area of Outstanding Natural Beauty