



# *Valuing* **NORFOLK'S COAST**

*environment - wildlife - tourism - quality of life*

**The economic benefits of  
a high quality environment**

**The potential of wildlife tourism**

**Striking a balance for the future**

# Valuing NORFOLK'S COAST

*environment - wildlife - tourism - quality of life*

People have long been attracted to the Norfolk coast by its special character, landscape and wildlife. Artists and writers have been inspired by its beauty while Cley Marshes and Blakeney Point have been renowned for their bird life for more than 150 years.

The scenic richness and variety of much of the coast and hinterland is acknowledged by its designation as an Area of Outstanding Natural Beauty. The panoramic skies, relative peace and wilderness, a gentler pace of life and traditional, unspoilt villages, ensure that visitors return often, some choosing to settle here.

 **Visitor Survey Site**

 **Business Case Study Site**

 **Major Nature Reserve**

 **= Study Area**

The outstanding wildlife of the Wash and north Norfolk coast is recognised by a host of designations and many nature reserves. No other area in the UK - and few in Europe - can match this coastline for sheer numbers and variety of birds.

This report underlines the contribution that the high quality of the Norfolk coast's environment makes to the area's economy through tourism. This is increasingly significant with the decline of traditional forms of employment such as agriculture and fishing. The coast's wildlife, scenery, beaches and special character are all major factors in attracting visitors.

With changing patterns of holiday making, plus the outstanding autumn and winter bird spectacles, there is significant potential for extending the tourism season, which could alleviate some of the problems associated with the peak season. Increasing visitor pressure and traffic congestion are readily apparent. More insidious is the contribution of vehicle emissions to climate change, which threatens many of the area's finest wildlife sites through sea-level rise.

While tourism provides jobs and income, and helps ensure the viability of local shops and services, its benefits are not universally felt. Tourism jobs are often part-time, poorly paid and seasonal, and demand for holiday homes is pushing house prices beyond the reach of local people.

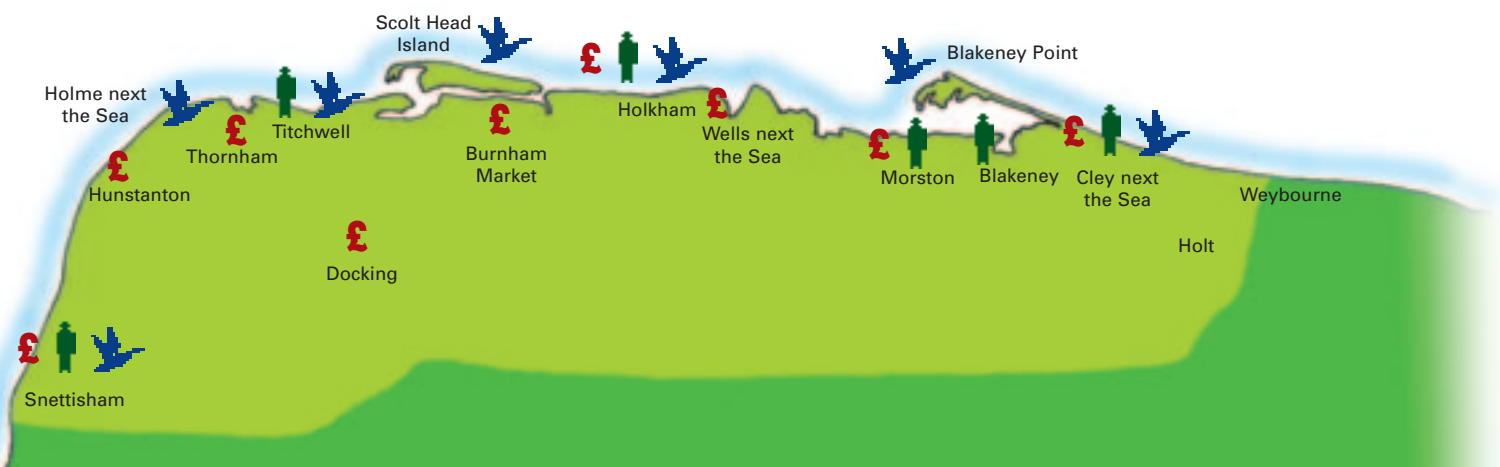
The challenge ahead is effectively summarised in the East of England Tourist Board's strategy for 2000-2010:

*If it is not managed tourism can damage the environment it relies on, alienate and exploit communities and cultures, create over-dependency on one industry, and exclude sections of the population from participation. Encouraging the 'sustainable' growth of tourism means maximising the benefits to visitor, tourism industry, environment and host communities while minimising the problems.*

The RSPB is committed to working in partnership with others to play its part in meeting this challenge.



High tide at Snettisham (RSPB Images)





## VISITOR SURVEY

Six sites were chosen for the visitor survey to provide a geographical spread and to be representative of visitors motivated by the area's wildlife and environment.

(Extensive details of methodology, sample sizes, visitor activities and expenditure, length of stay, accommodation used, etc. broken down on a site by site basis, can be found in the full length report available from RSPB).

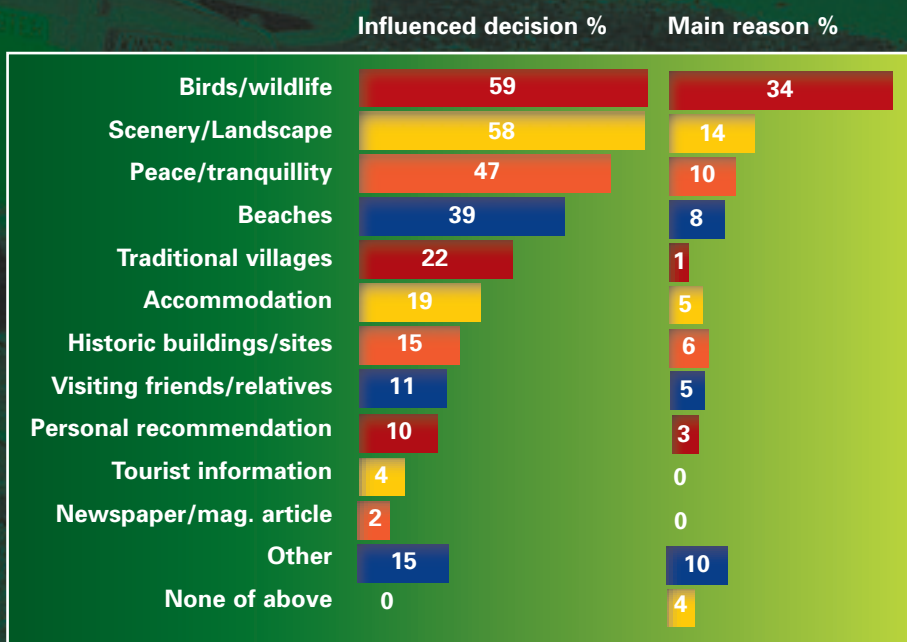
- Blakeney Quay car park (estimate 140,000 visitors)
- Cley Marshes Norfolk Wildlife Trust visitor centre (estimate 100,000 visitors to whole reserve)
- Lady Anne's Drive, Holkham (estimate 110,000 visitors)
- Morston Quay car park (estimate 140,000 visitors)
- Snettisham beach car park (estimate 41,000 visitors)
- Titchwell Marsh RSPB visitor centre (135,000 visitors)

Surveys were carried out in August and October 1999 to cover both peak season and shoulder month visitors. Quotas were used to ensure a representative sample of visitors and over 250 interviews took place at each site. In total 1,759 questionnaires were completed with respondents answering on behalf of 5,076 visitors.

## KEY FINDINGS INCLUDE

### Reasons for Visiting

Birds and wildlife were the biggest attraction for visitors to the survey sites, with 34 per cent of respondents identifying them as their main reason for visiting the area. Other important reasons were scenery, landscape, peace and tranquillity.

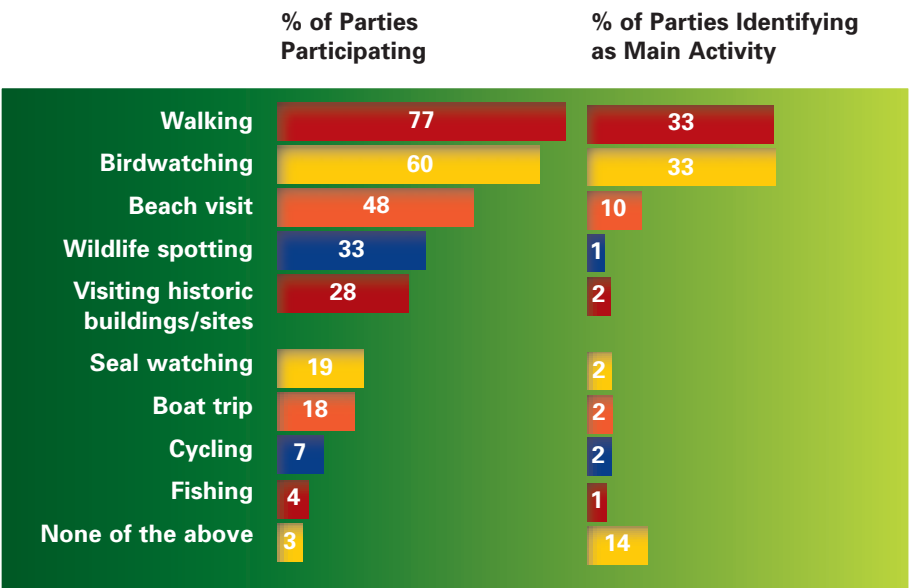


*This report focuses on the economic value of tourism associated with the special wildlife and environment of the Norfolk coast - see map for study area. It is based on a visitor survey, business case studies and an analysis of local spending and jobs associated with nature reserves. Methodology and analysis were carried out in conjunction with tourism, leisure and rural consultants, Geoff Broom Associates, drawing on the Cambridge Model approach developed with the Regional Tourist Boards, which provides estimates of the volume and value of tourism at the local level.*



Seal trips are increasingly popular (EA Janes)

Activities of Visitors to Survey Sites



Visitors to each site were asked about the importance of the site itself in influencing their decision to visit the area. In each case 30-40 per cent of visitors identified the site as the main reason for their visit. Cley and Titchwell visitors were more likely to have planned to visit these sites before reaching the area than visitors to the other four sites, perhaps on account of their national reputation as leading nature reserves.

Visitor Expenditures

Interviewees were asked what they had purchased, or planned to purchase on the day of their visit and this was used to estimate their spending over the duration of their stay.

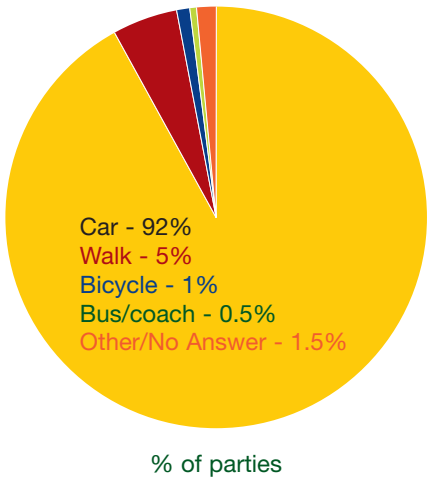
Estimated Trip Expenditure

	Average Daily Spend per visitor (£)	Average Trip Spend per visitor (£)
Accommodation	6.36	23.29
Food and Drink	4.49	19.72
Travel and Petrol	1.62	6.85
Entry Fees		
/Entertainment	0.60	1.89
Gifts/Souvenirs	1.03	4.18
Other	0.76	3.64
Total	14.86	59.57

Average trip expenditures per visitor were highest at Cley and Blakeney, and lowest at Snettisham.

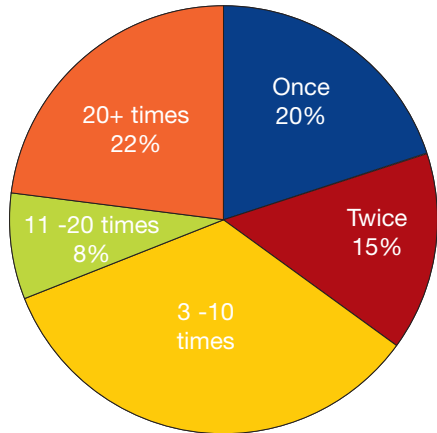
Additional turnover from visitor spending supports jobs primarily in the accommodation, catering, attractions and retail sectors. These businesses indirectly support additional jobs when buying goods and services. In turn money spent locally, by employees whose jobs directly or indirectly depend on visitor spending, supports further jobs.

Proportion of parties using different forms of transport - All Sites



This confirms concerns about the continued predominance of car use and the lack of easy alternatives.

Number of visits to area in the last two years



Avocets, a favourite with visiting birdwatchers (RSPB Images)



## Summary of visits, expenditure and jobs supported

	VISITS		VISITOR SPEND	JOBS SUPPORTED	
	Day visits	Nights		Actual	FTE*
N & W Norfolk	35.6m	6.5m	£ 507m	14,018	9,997
Study Area	7.7m	5.5m	£ 122m	3,266	2,325
Survey Sites	0.2m	1.0m	£ 21m	620	442

\* Full-time equivalent

The 14,018 actual jobs supported by visitor spending in N & W Norfolk accounts for 17.5% or 1 in 6 of all jobs in the two District Council areas. There is no reliable basis for arriving at an equivalent figure for the study area.

## Spending and jobs attributable to different features of the area

Using the data on people's motivations for visiting the area it is possible to estimate spending attributable to different features.

It is estimated that:

- visitors to the six sites spend £5.3 million on the day of their visit and £20.8 million in the area during their trip as a whole

## Spending and jobs in the local economy derived from visitors to the six survey sites, attracted primarily by

	Spend	Actual jobs	FTE jobs
Birds & wildlife	£6.2m	184	131
Scenery & landscape	£2.7m	81	58
Beaches	£2.4m	71	50
Peace & tranquillity	£2.8m	84	60

- annual visitor expenditures attributable to the sites themselves vary from £0.5 million at Snettisham to £4.3 million at Blakeney

## Visitors' views about the study area

When visitors were asked what they liked about the area, common answers included peace and quiet, scenery and landscape, pace of life, birds and wildlife, and the general unspoilt nature of the area. "Everything" was a common answer to this question.

*"I like so many aspects of it I can't pinpoint one. Great open sweep of sky, the sea, wildflowers."*

*"Beaches, birdlife and the pace of life here. It's not over commercial, and we're not being ripped off."*

*"Unspoilt - fewer and fewer really unspoilt places like this are left. Don't let it change."*

*"The air and the environment. When I've been here I feel like I've had a holiday."*

Asked about dislikes the most common answer was "nothing". Others mentioned the increasing number of visitors, the growing levels of traffic, the quality of the roads, and the level of car parking charges.

## BUSINESS CASE STUDIES



Lifeboat Inn, Thornham

The owners/managers of twelve businesses were interviewed to ascertain their views on the value of 'green tourism' to their individual business. Such a small sample can only provide a snapshot and does not claim to be representative of the entire business sector across the study area. The sample also has a high proportion of larger businesses as this reflects greater availability of their owners/managers to find time to take part.

## Businesses interviewed

Business	Location	Staff f/time p/time	
Grooms Bakery	Burnham Market	1	2-3
The Hoste Arms	Burnham Market	50	20
Made in Cley (jewellers & potters)	Cley-next-the-Sea	5	2
Leveretts Butchers	Docking	3	1
Holkham Nursery	Holkham	3	6
Holkham Pottery	Holkham	5	4
Searles family holiday centre	Hunstanton	65	150
Le Strange Arms Htl	Hunstanton	25	25
Bean's Boat trips	Morston	2	1
The Rose & Crown	Snettisham	15	10
The Lifeboat Inn	Thornham	20	10
Pinewoods	Wells-next-the-Sea	15	25
Holiday Park			

For all businesses surveyed, tourists represent an important or crucial part of their customers. Asked what attracts the tourists they cite the scenery, beaches, walking, wildlife, sailing, golf, the air and especially the unspoilt character of the area - peace and quiet, the ability to get away from it all. Several commented on the changing patterns of visiting with more short breaks and more visitors in the shoulder months and winter. Some expressed concerns about the possible negative impact of a continued increase in visitor numbers.

## Economic Impact of Nature Reserves

A survey of nature reserves in the area looked at sites managed by the RSPB, English Nature, Norfolk Wildlife Trust and the National Trust. This examined their expenditure in the local economy, direct employment on reserves and use of volunteers.

**Nature reserves** make a valuable contribution to the local economy, including:

- direct employment of 35 actual jobs (26.5 FTE jobs)
- indirectly a further 4 FTE jobs as a result of spending by reserves and their employees
- £137,000 spent on local goods and services

**Employment** has increased at all sites over the last five years. In the next three years employment is expected to increase at one site and remain static at the others.

**Volunteers** contribute just under 3,000 days of work per year on the sites surveyed. They receive a wide range of skills training, including chainsaw handling, first aid, retail, catering, visitor care and varied outdoor activities.

**Spending** by visitors in the local economy attributable specifically to individual nature reserves includes:

- **Titchwell Marsh**

£1.81m spend in the local economy supporting 39 direct and indirect FTE jobs.

- **Cley Marshes**

£2.45m spend in the local economy supporting 52 direct and indirect FTE jobs.

## Quotes from businesses

*"Any increase in visitors is likely to spoil what they have come here to see in the first place, and we would lose that feeling of freedom Norfolk offers."*

**Michael Leverett**

*"Green tourism is a growing market which helps to fill my beds."*

**Bob Wyllie,  
Le Strange Arms Hotel**

*"Conservation has an important part to play in the future of the region, providing local people are involved."*

**Peter Groom**

*"Tourism is vital to Cley's fortunes, the shops, small businesses, even the electricians and builders, all rely on tourists."*

**Barbara Widdup, Made in Cley**

*"Wildlife definitely attracts our customers, they clearly love the environment. Wildlife tourism, especially birdwatching, also extends the season into the shoulder months."*

**Matthew Beck,  
Pinewoods Holiday Park**

The RSPB is grateful to the following organisations for their generous support for this project



The power of the 'green pound' (RSPB Images)



for birds  
for people  
for ever

For further information, or a copy of the full report please contact Paul Lewis at the address below.

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