

Norfolk Tourism SWOT research

Research findings for Visit Norfolk

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Prepared by Helen Terry & Laura Davey
Insight Track Ltd.
T: 01603 626800
E: helen@insighttrack.co.uk

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- ➔ Visit Norfolk is the strategic voice of tourism and official website for the county, operating under contract from Norfolk County Council and the New Anglia LEP, with a website “visitnorfolk.co.uk” launched in June 2013
- ➔ Despite the high visitor numbers, Visit Norfolk considers there to be an opportunity to increase the size of the tourism sector, developing the county as an all-year-round holiday and short break destination, whilst catering for the needs of all ages and interests.
 - ⇒ There is a specific desire to increase visitor numbers, trips and spend in the county, and in particular, targeting those within a two-hour travel time
- ➔ It is felt that there is now a requirement for insightful research to gain a clearer understanding about Norfolk’s visitor market, with a view to inform development of future strategy and to maximise return on investment from marketing spend

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

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

Specific research objectives included:

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

How?

- Predominantly **quantitative online self-completion survey** distributed via a national panel

How many?

- A total of **1,601 respondents**, providing **robust findings overall**, with some robustness across sub-groups

Who?

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

When?

- Fieldwork was conducted during **June 2014**

Where?

- **UK-wide**

Respondent profiles

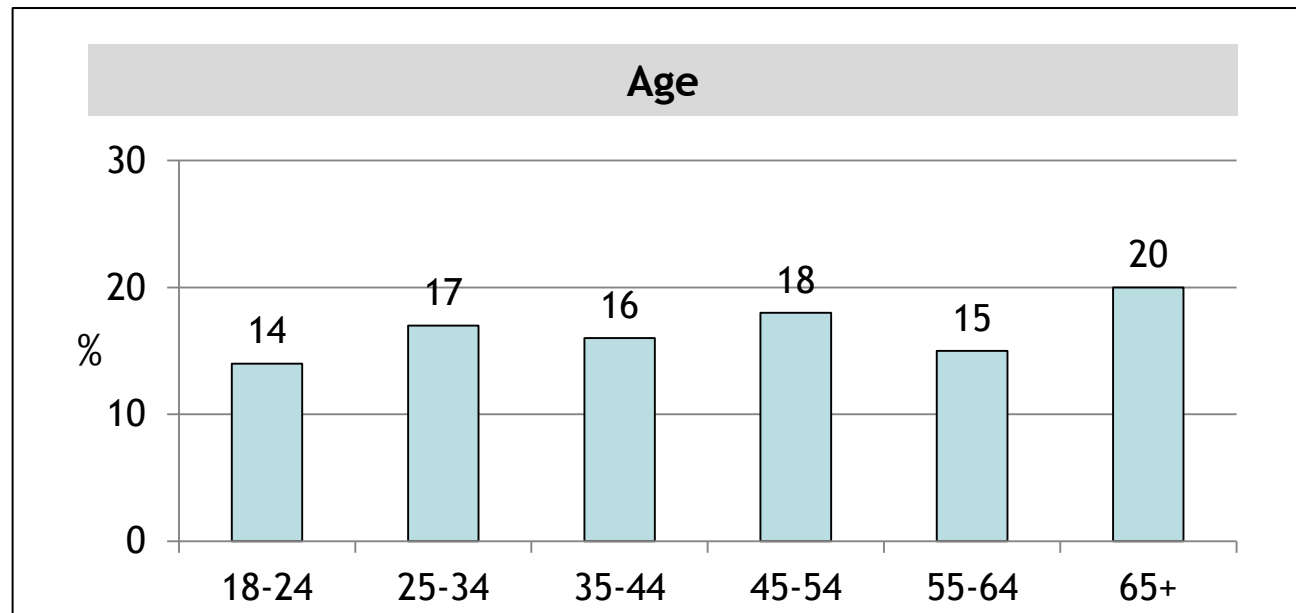
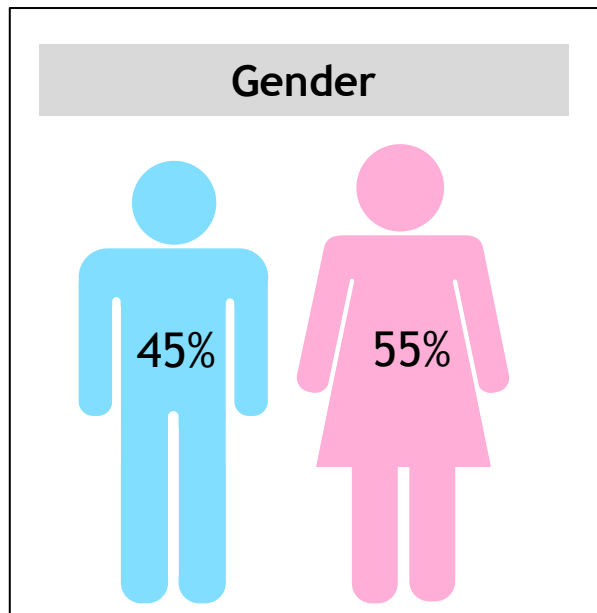
(Used for quota controls and cross-analysis)

Respondent profile: demographics

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→ Through the use of quotas:

- ⇒ A good **range of ages** was achieved
- ⇒ Respondents were a **mix of men and women**



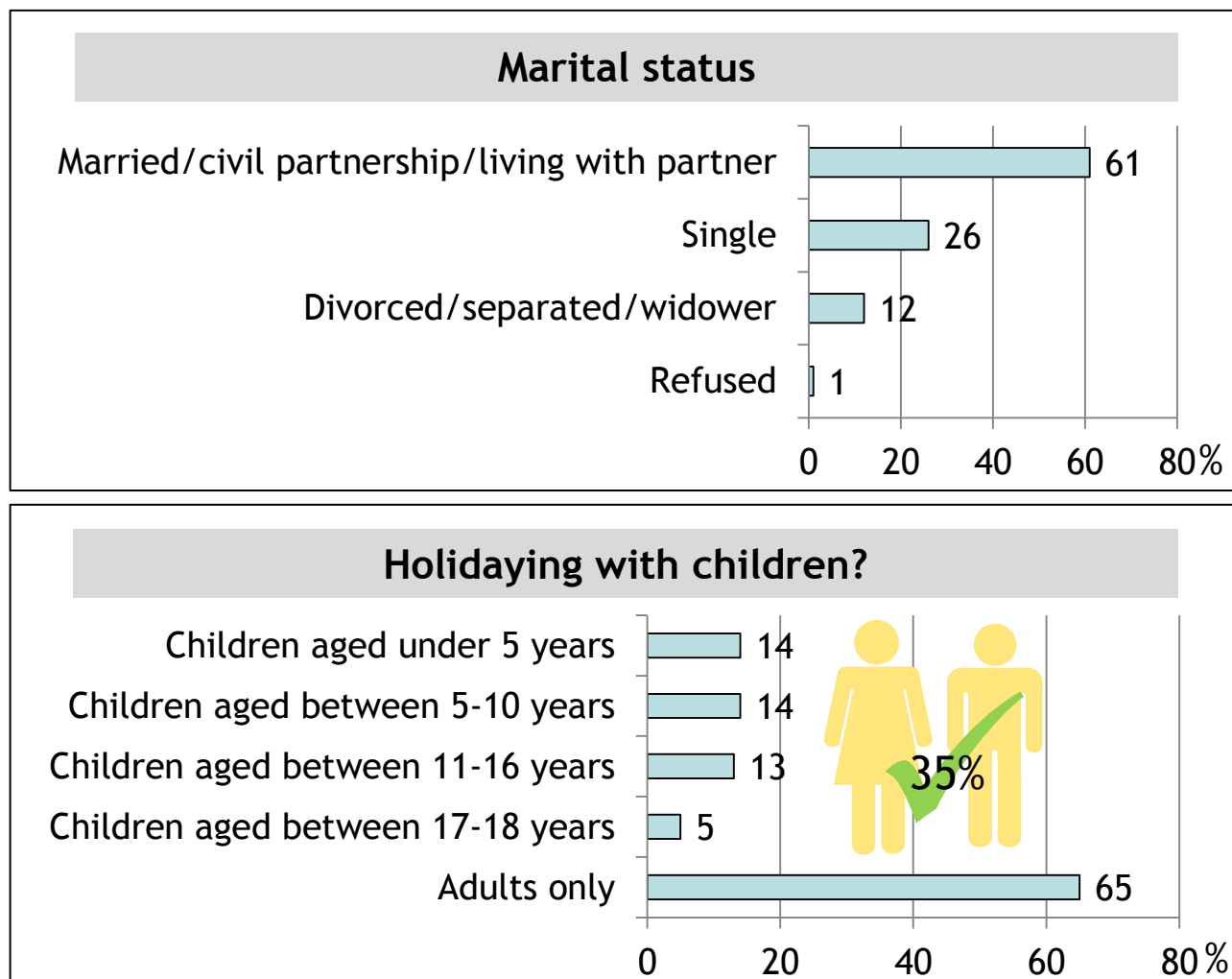
Respondent profile: family structure

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→ Respondents were generally in a relationship

→ Around a third take holidays with children

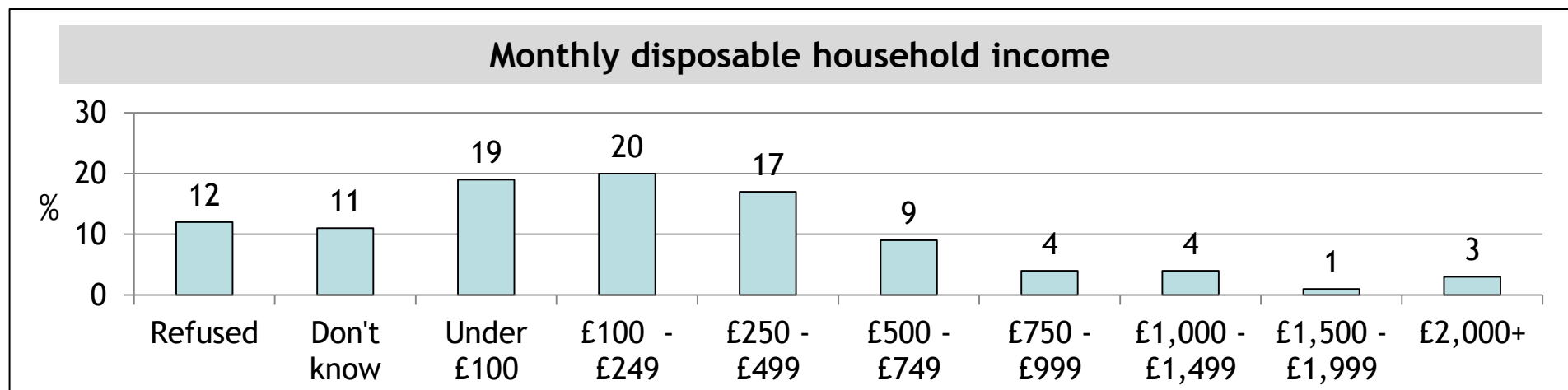
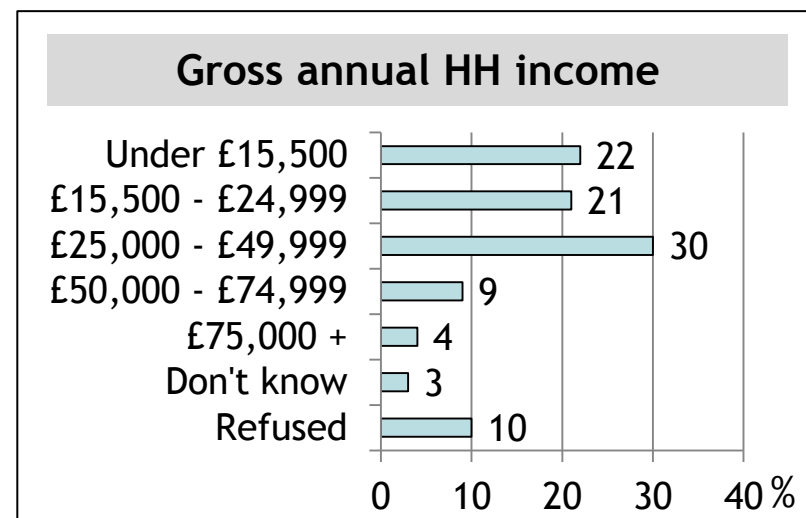
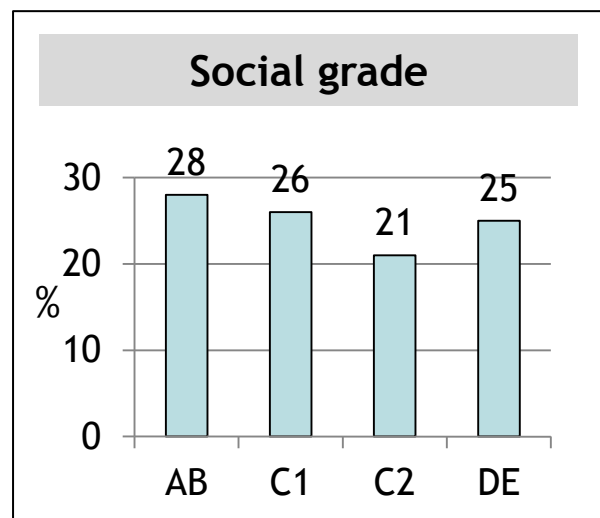
→ No quotas were applied to these profiling questions



Respondent profile: income and social grade

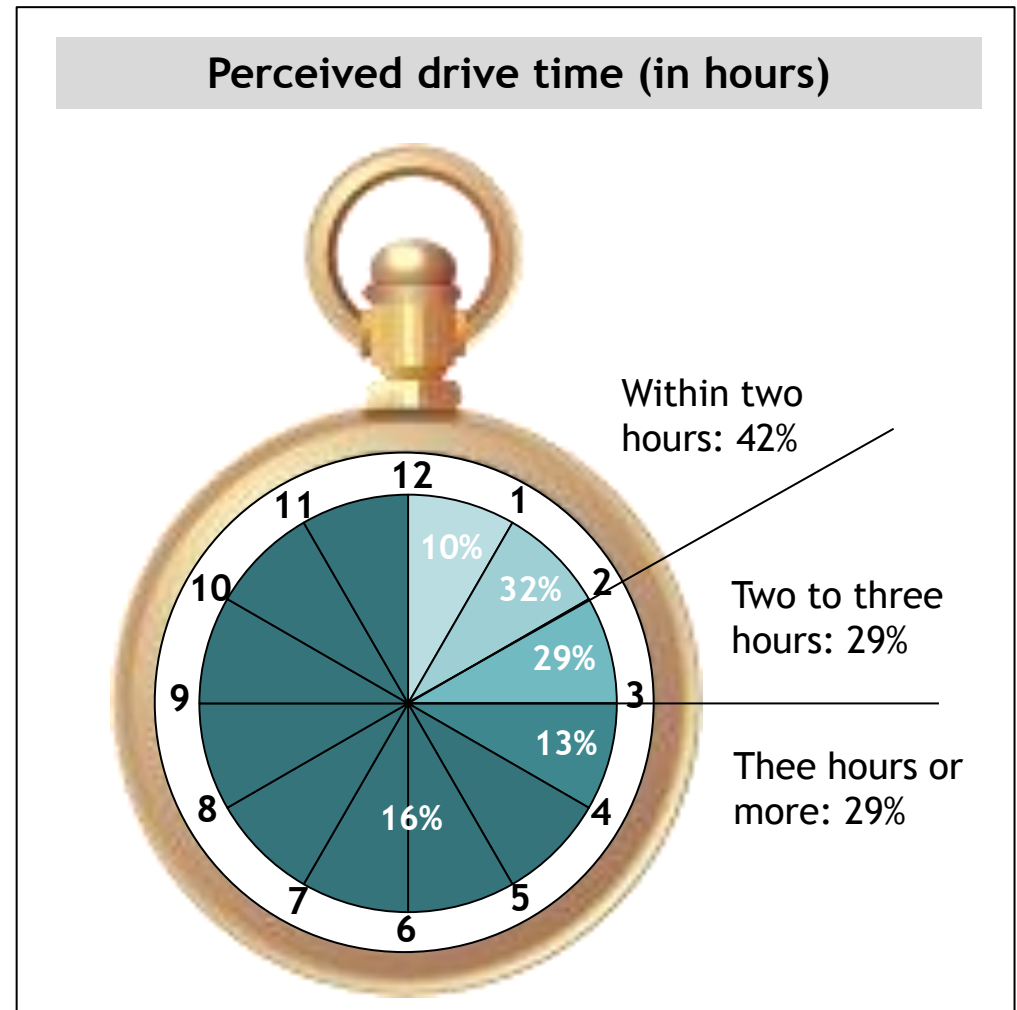
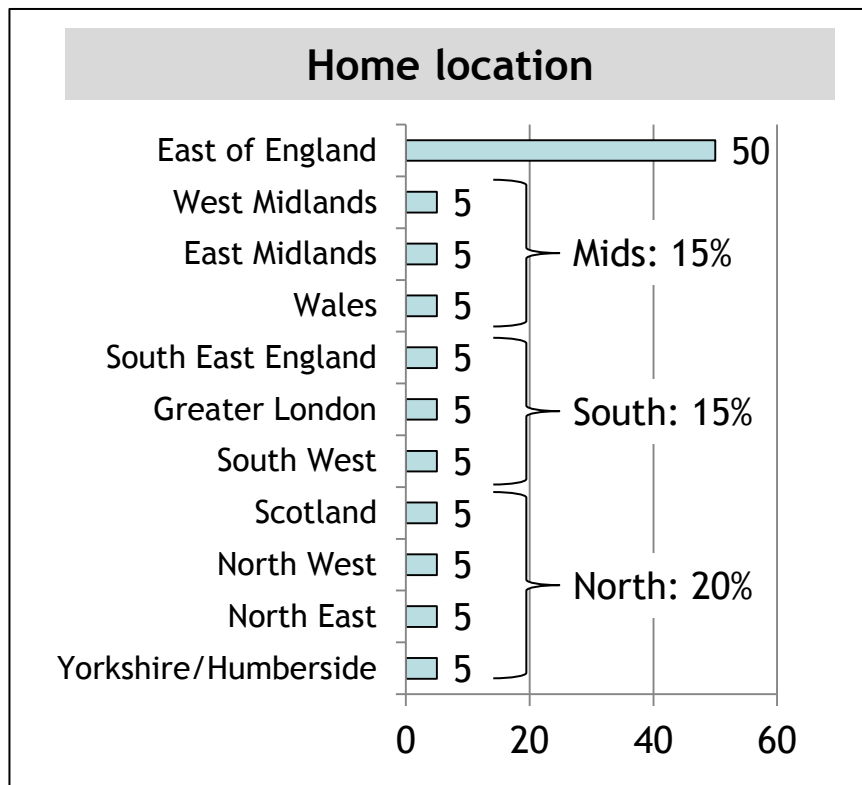
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- A quota applied to **social grade** ensure a good mix
- A range of **income levels** naturally followed



Respondent profile: location and drive time to Norfolk₁₀

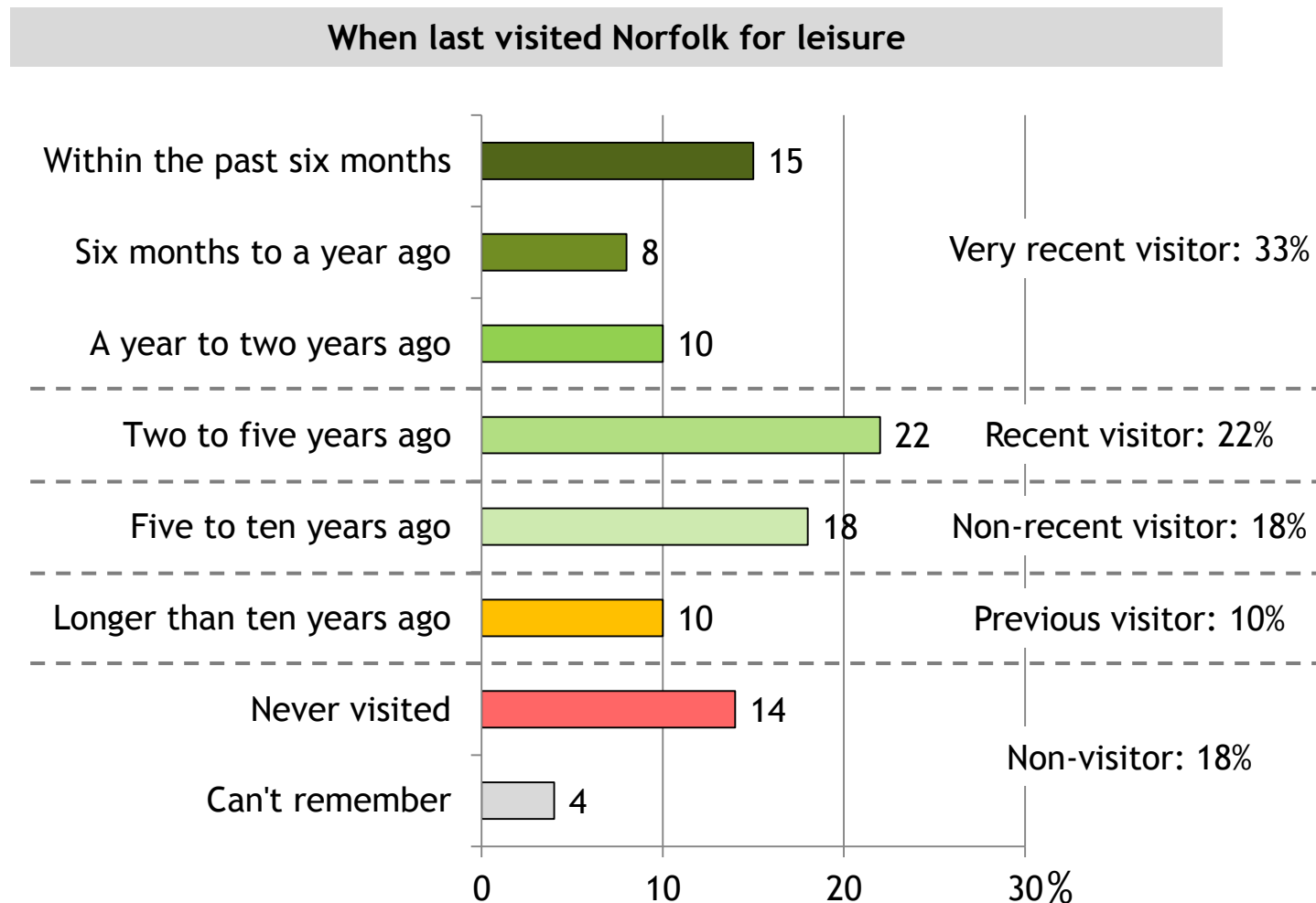
- Quotas saw a range of perceived drive times represented, and ensured that around half the respondents were from the East of England



Respondent profile: recency of visiting Norfolk

11

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



Findings:

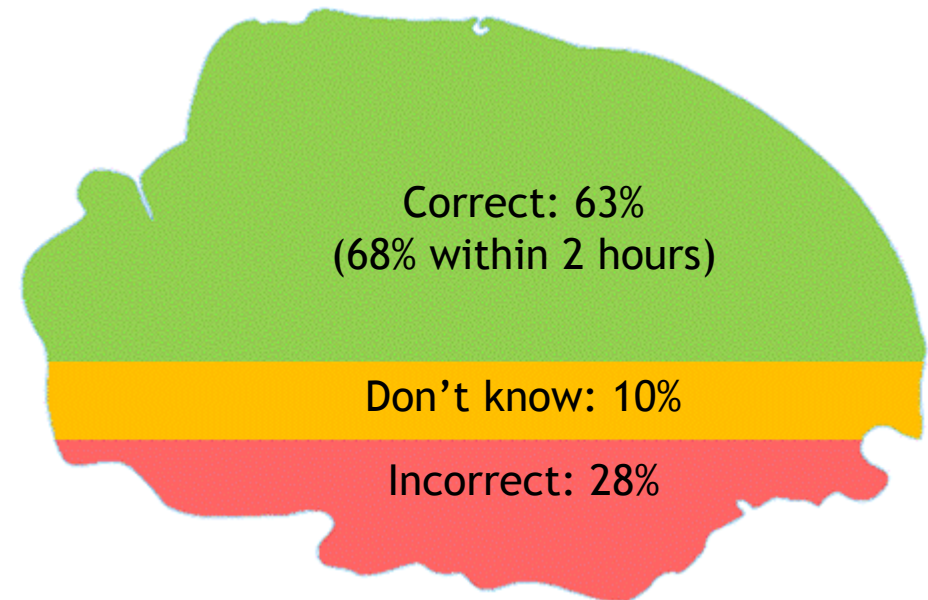
Awareness of Norfolk

Do people know where Norfolk is?

13

- ➔ Overall, **only around two-thirds actually know where Norfolk is** when presented with a blank county map of the UK
- ➔ Accuracy was perhaps **surprisingly low even amongst close neighbours to the county** - only just over two-thirds (68%) within two hours know, although **those living in the North are the least likely to know (49%)**
- ➔ Around two-fifths (42%) of non-visitors knew, although perhaps surprisingly only 67% of visitors did, with **little difference by recency of visit** - only 69% of very recent visitors identified Norfolk correctly!
- ➔ Other groups more likely to know than their counterparts:
 - ⇒ Aged 55+ (72%)
 - ⇒ Holidaying with no children (66%)
 - ⇒ ABC1 (67%)

Identifying Norfolk on a blank UK county map

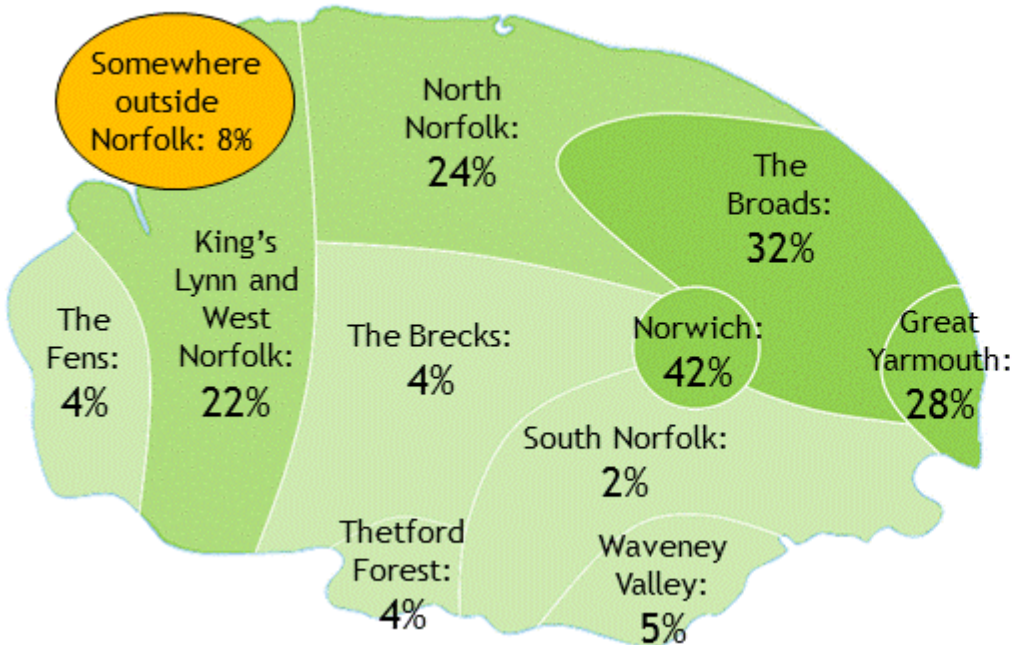


Awareness of areas of Norfolk

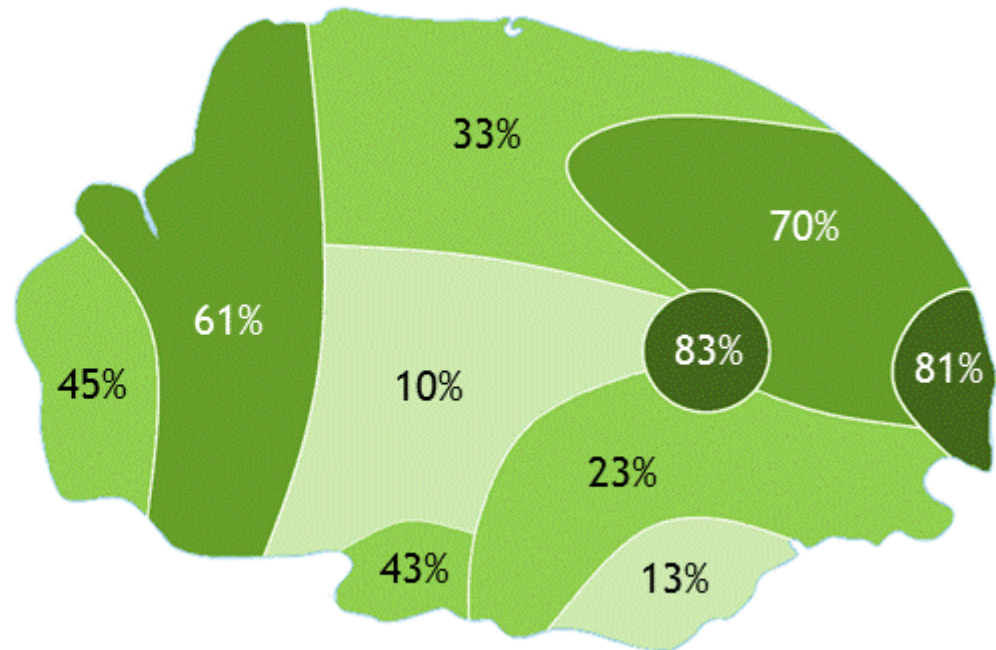
14

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

Unprompted awareness



Prompted awareness



Typical visitors and visiting habits

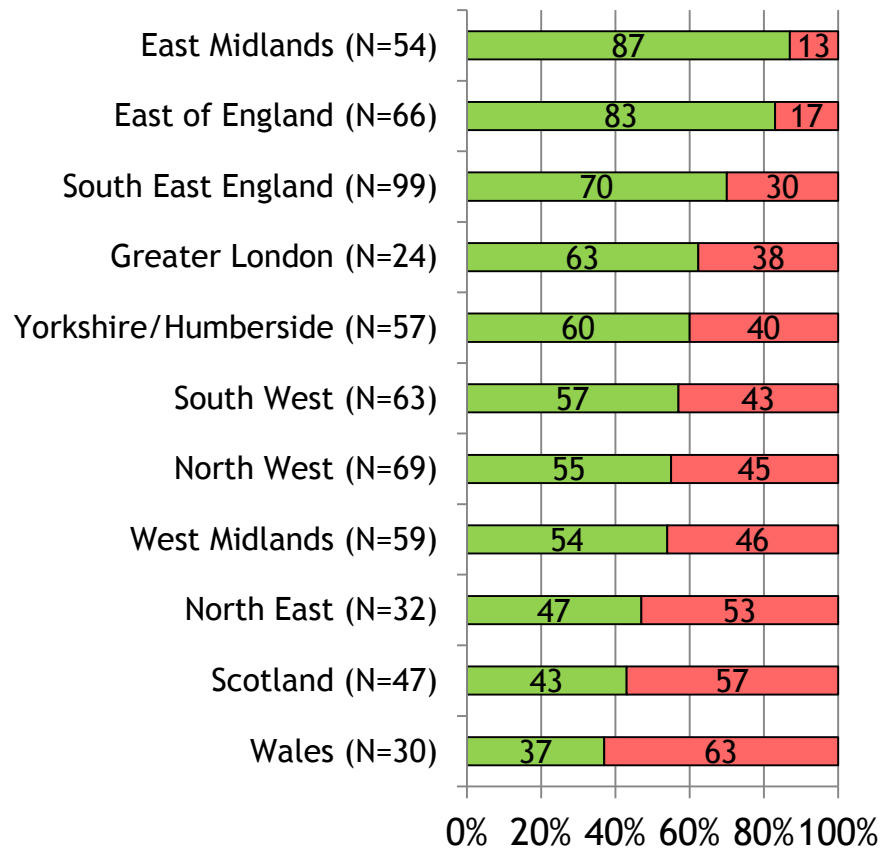
Who has visited Norfolk?

(Natural fallout demographics - before quotas were applied)

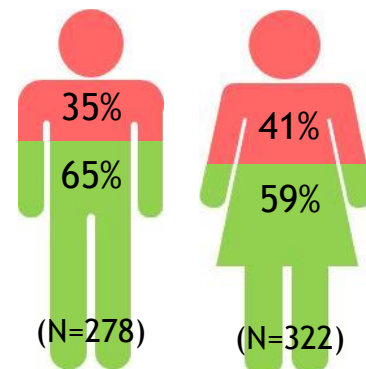
■ = visited
■ = not visited

16

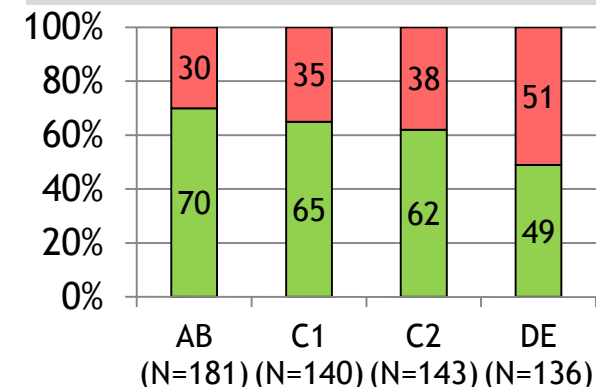
Home location (ever visited)



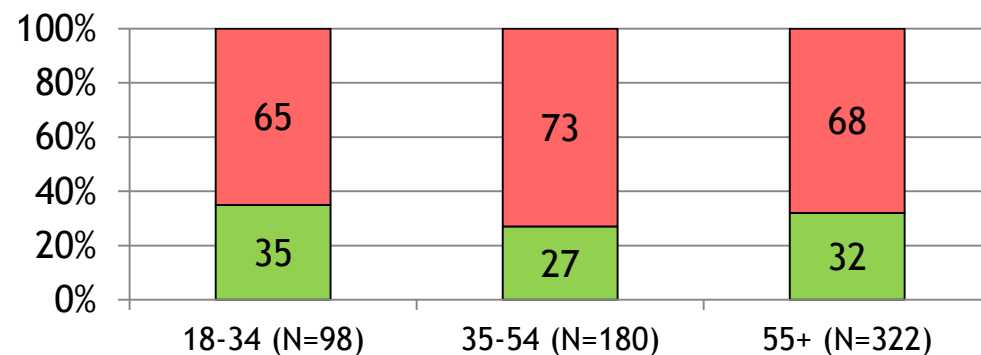
Gender (ever visited)



Social grade (ever visited)



Age (visited in past five years)



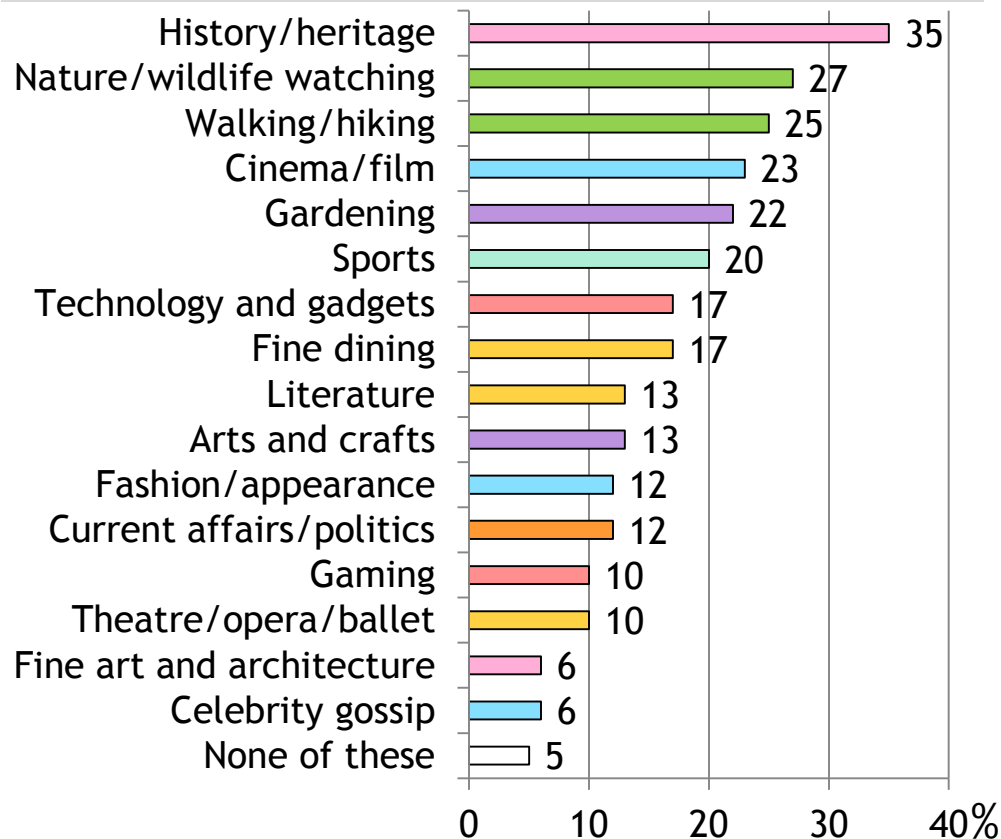
Who has visited Norfolk?

(Hobbies and interests)

17

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

Specific interests of the overall sample



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

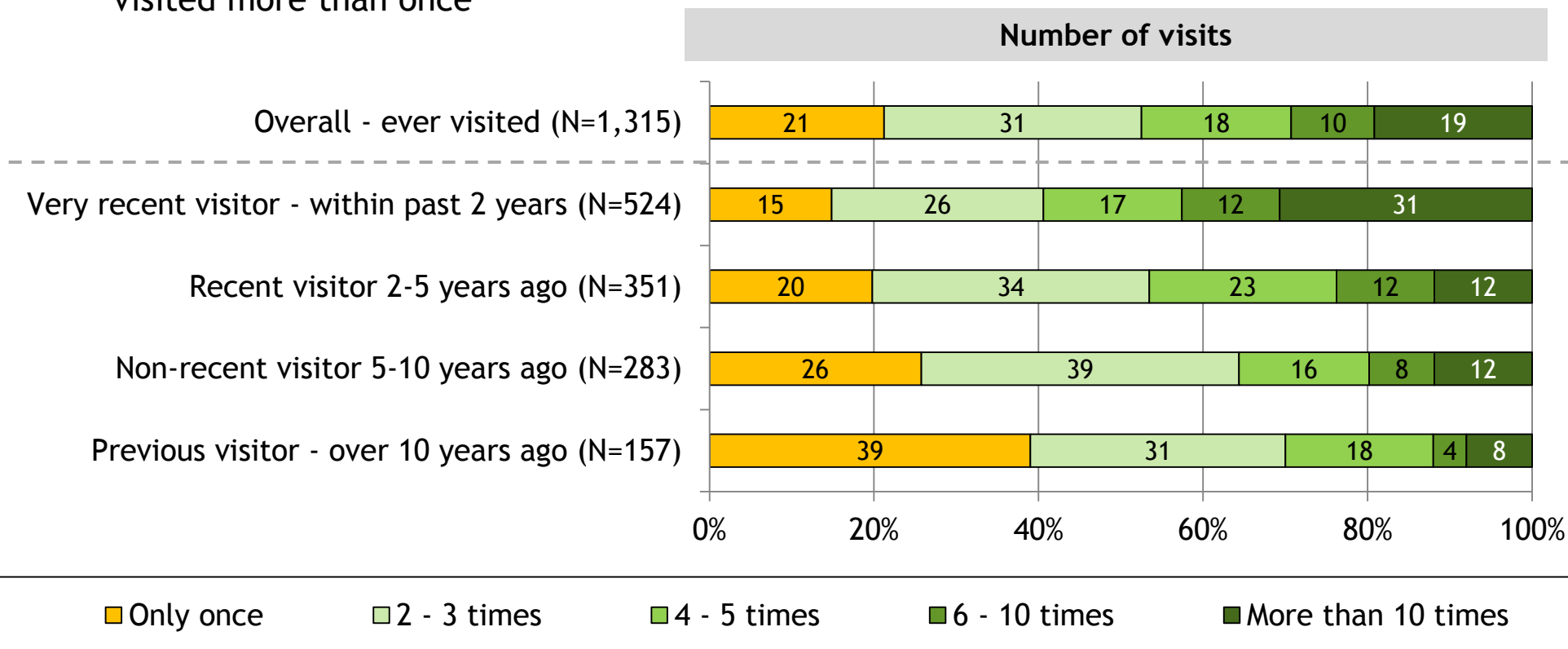
Categorised interests of visitors and non-visitors

	Visitors	Non-visitors
The outdoors	43%	35%
High culture	36%	33%
Popular culture	33%	40%
Technology	20%	33%
Hands-on	33%	24%
Sports	19%	21%
Politics	12%	13%
History	39%	30%

Number of visits to Norfolk

18

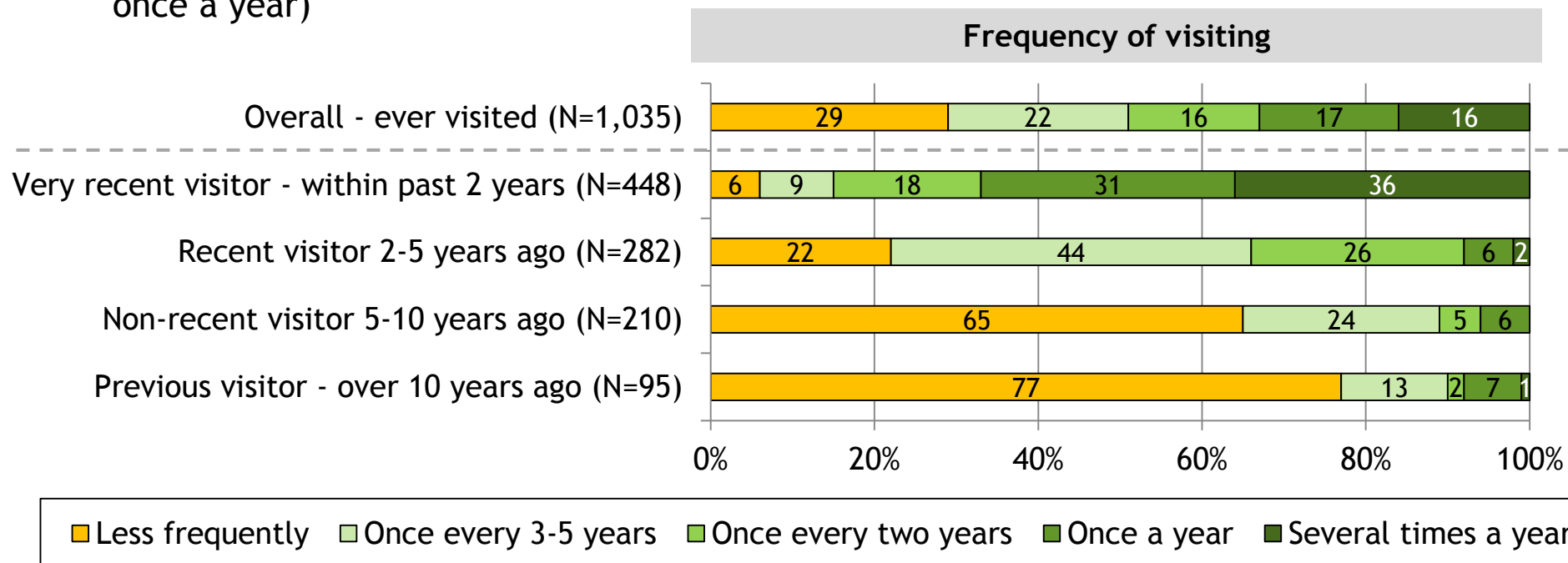
- The number of visits to Norfolk **typically reflects the recency of last visiting** the county and drive time (30% within 2 hours have visited more than 10 times)
- Nonetheless, over half (61%) of those who have not visited in the past ten years have visited more than once



Frequency of visiting Norfolk

19

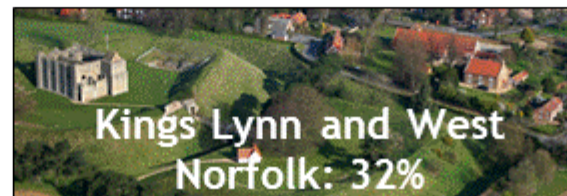
- ➔ Also as might be expected, **very recent visitors are also the most frequent visitors**, while non-recent/previous visitors are unlikely to visit more often than once every five years
- ➔ **Drive time is also a major factor** - nearly half (46%) of those who live within two hours visit at least once a year compared to just 18% of those living 3+ hours away
- ➔ 18-34s from the East of England are also particularly frequent visitors (28% visiting at least once a year)



Visiting areas of Norfolk

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- Visiting in general is **loosely correlated to home location** - those from the North typically visiting two areas, while those from the rest of the country having visited three
- **Urban areas are far more likely to be visited than more rural areas** (especially by those aged 18-34), although **the Broads are also frequently visited** (regardless of home location, although significantly more visited by those aged 35+)
- Great Yarmouth specifically attracts C2DE (76%) and those with a limited income of less than £250 a month (70%)



Least visited

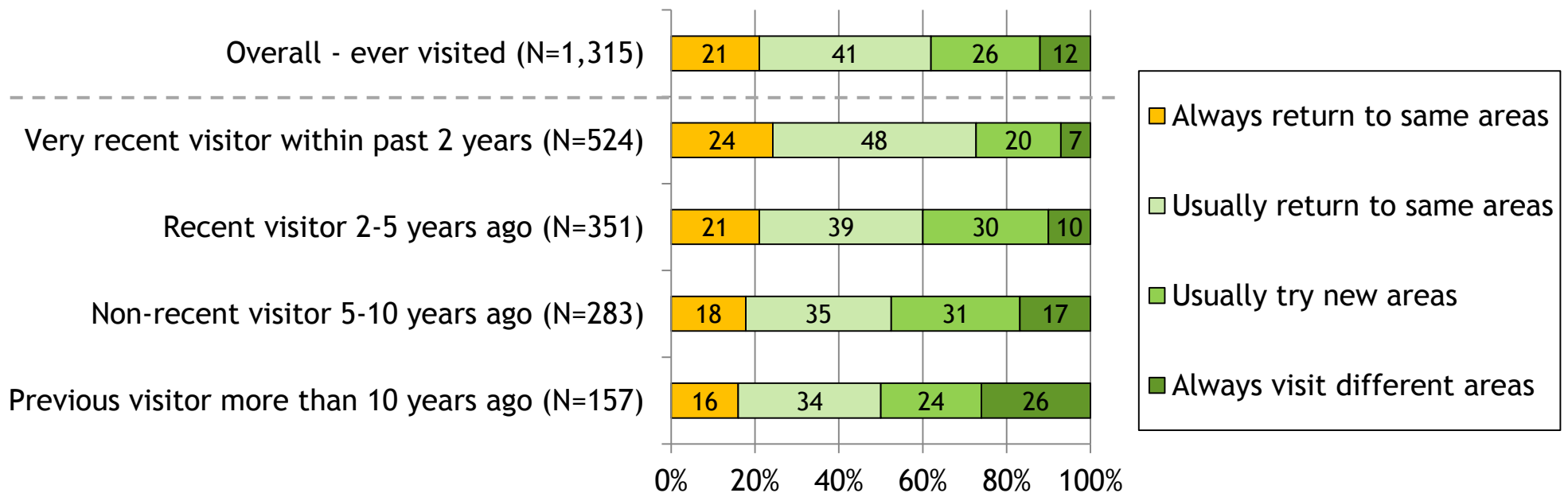
Most visited

Typical behaviour regarding visiting specific areas

21

- ➔ In general, attitudes towards returning to specific areas is quite similar regardless of the recency of visit and drive time
 - ⇒ Nonetheless, those having visited in the past two years appear to be less open to the idea of trying new areas

Typical behaviour regarding areas visited



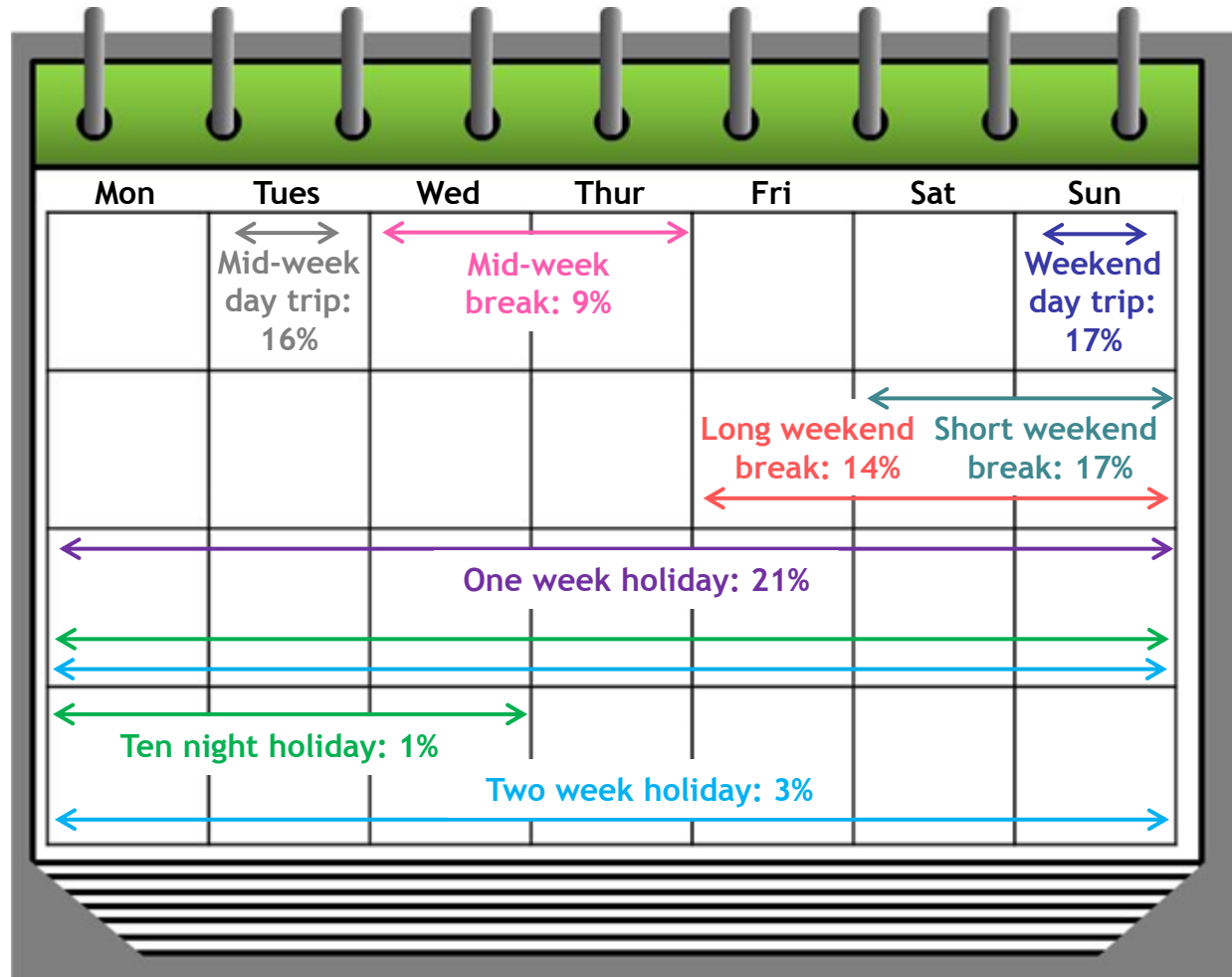
*On your last visit to Norfolk...
(visit logistics)*

Length of visit

(On your last visit to Norfolk...)

23

- ➔ A week's holiday is the most common length of visit
 - ⇒ Most frequently taken by those aged 35+ (24%) and those travelling more than three hours (37%)
- ➔ However staying longer than a week is relatively rare
- ➔ Daytrips are also popular
 - ⇒ Particularly amongst those within 2 hours drive (48%)
 - ⇒ Mid-week trips are taken by lower income (20%), 55+ (22%) with no children in tow (19%), and weekend trips are most likely to be taken by those aged 18-34 (24%)

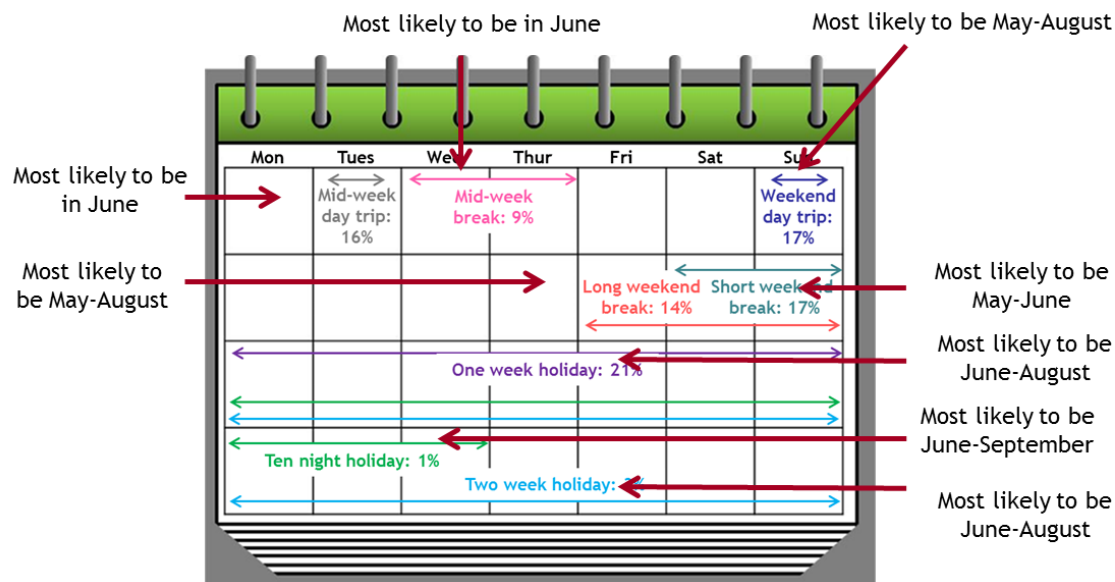


Length of visit

(On your last visit to Norfolk...)

24

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

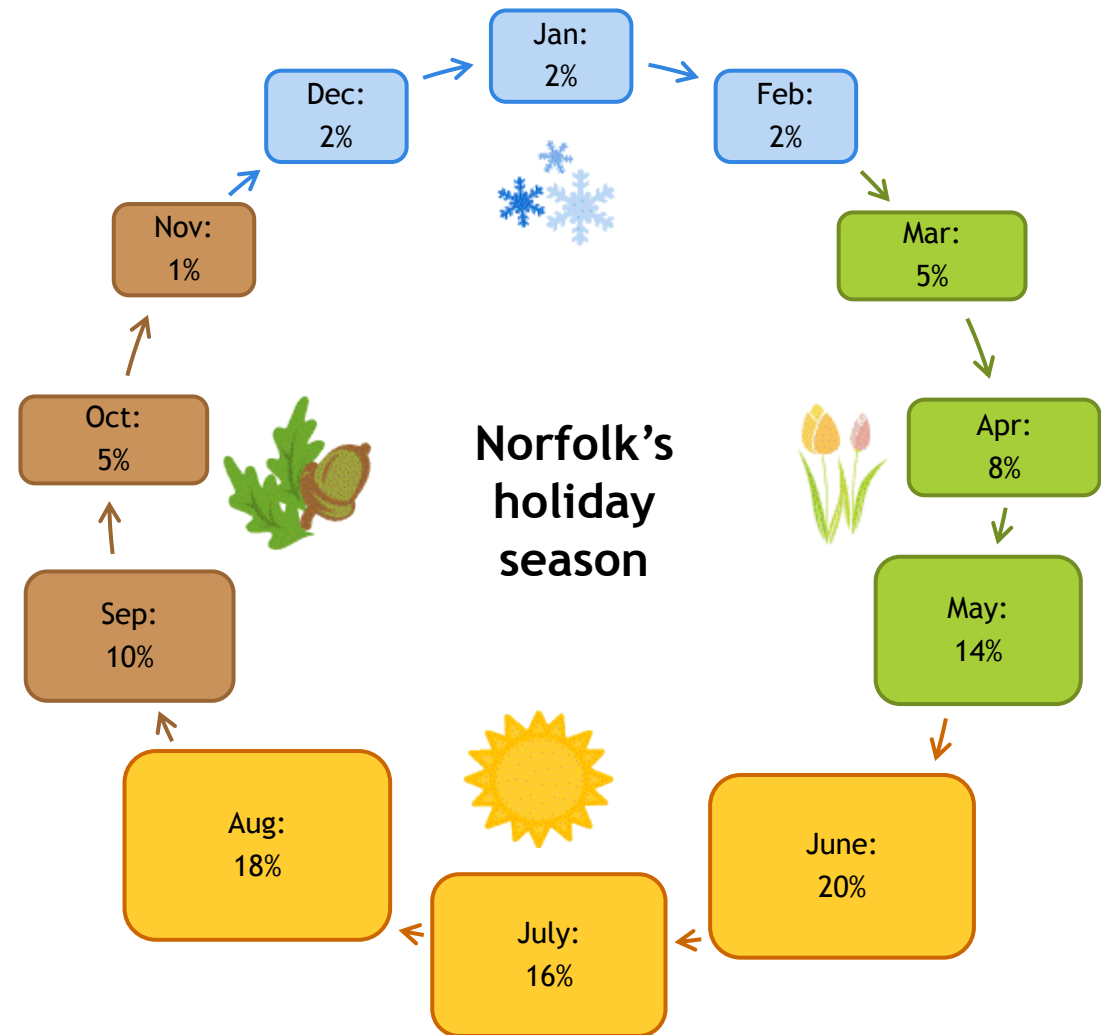


% of visitors that month who are day trippers			
January (N=27)	48%	July (N=212)	33%
February (N=24)	54%	August (N=241)	30%
March (N=50)	50%	September (N=138)	30%
April (N=107)	42%	October (N=64)	29%
May (N=189)	34%	November (N=18)	50%
June (N=268)	32%	December (N=20)	25%

Time of year

25

- ➔ Norfolk's key holiday season appears to be **April to September**
 - ⇒ June to August is the key peak, **particularly amongst those taking children** (i.e. school summer holidays)
- ➔ A third (30%) of those within a two hour drive visit Norfolk in the Spring, whilst those **extending the season to September** are most likely to be aged 55+ (16%), DE (14%), holidaying without children (12%) and couples (12%)
- ➔ Those aged 18-34 are marginally more likely than most to take a **winter holiday in Norfolk** than older age groups (3% in December and 5% in January)



Time of year - by location

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% of that month's visitors	
70-79%	30-39%
60-69%	20-29%
50-59%	10-19%
40-49%	1-9%

- Visitors in November-April are most likely to be visiting Norwich, whilst May-October visitors are most likely to be visiting Great Yarmouth
- Visitors in March appear more likely to be visiting a wider variety of areas



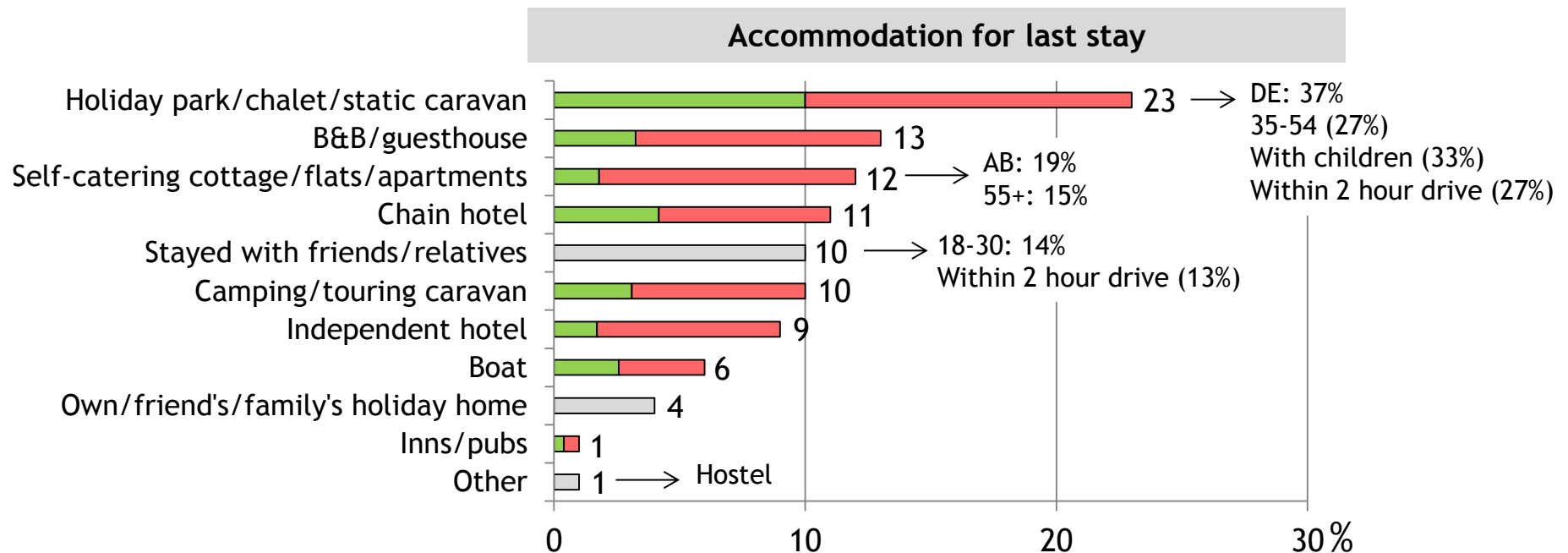
		Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
		N=29	N=26	N=23	N=61	N=107	N=189	N=262	N=211	N=239	N=137	N=64	N=18
Great Yarmouth	66	55	35	43	52	55	71	69	70	78	69	67	44
Norwich	56	65	62	57	66	59	61	59	48	55	56	61	50
The Broads	43	35	38	26	41	43	52	46	46	44	49	34	33
Kings Lynn & West Norfolk	32	25	19	17	41	30	39	35	29	31	41	30	28
Thetford Forest	26	35	19	30	44	26	28	31	26	23	23	20	17
North Norfolk	24	20	12	30	33	26	28	25	28	19	28	19	22
The Fens	15	20	15	13	26	18	15	15	14	14	18	13	6
South Norfolk	10	10	12	17	25	15	10	10	12	8	12	8	11
Waveney Valley	6	5	6	9	16	8	7	7	7	7	7	3	6
The Brecks	3	5	8	13	10	4	4	3	3	3	3	3	6

Accommodation stayed in

(On your last visit to Norfolk...)

27

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

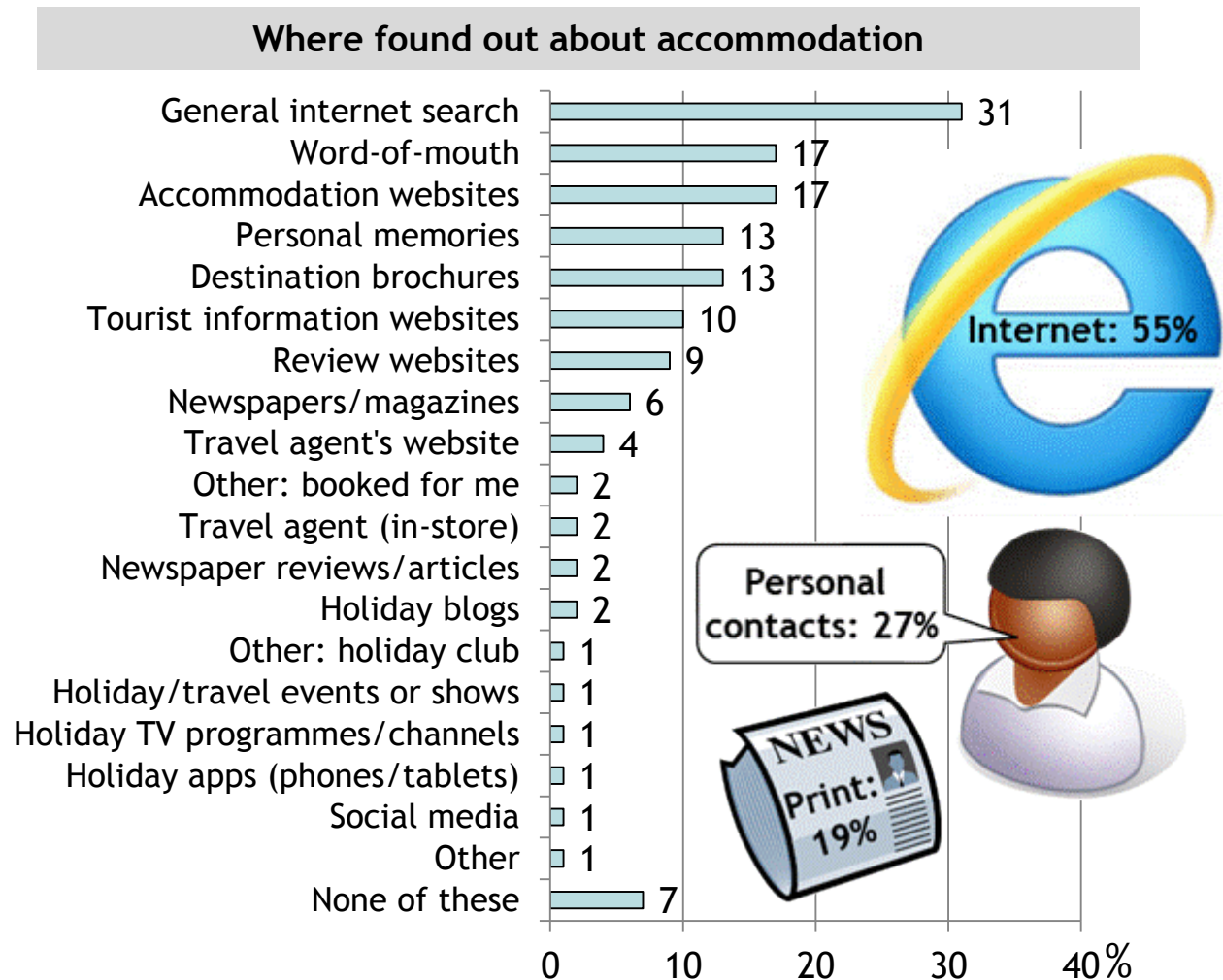


Planning accommodation: information sourcing

(On your last visit to Norfolk...)

28

- **Online sources are the most frequently used** sources of information
 - ⇒ Most frequently used by ABs (67%) and 18-34s (67%)
 - ⇒ 22% of those who use accommodation websites for information then book their accommodation by phone
- **Personal contacts** (word-of-mouth and memories) are also important
 - ⇒ Particularly so amongst relatively local East of England residents (31%)
- **Print sources are less used**
 - ⇒ Although still used by DEs (26%) or those with affluent (£50-75,000) HH incomes (31%)



Planning accommodation: how far ahead booked

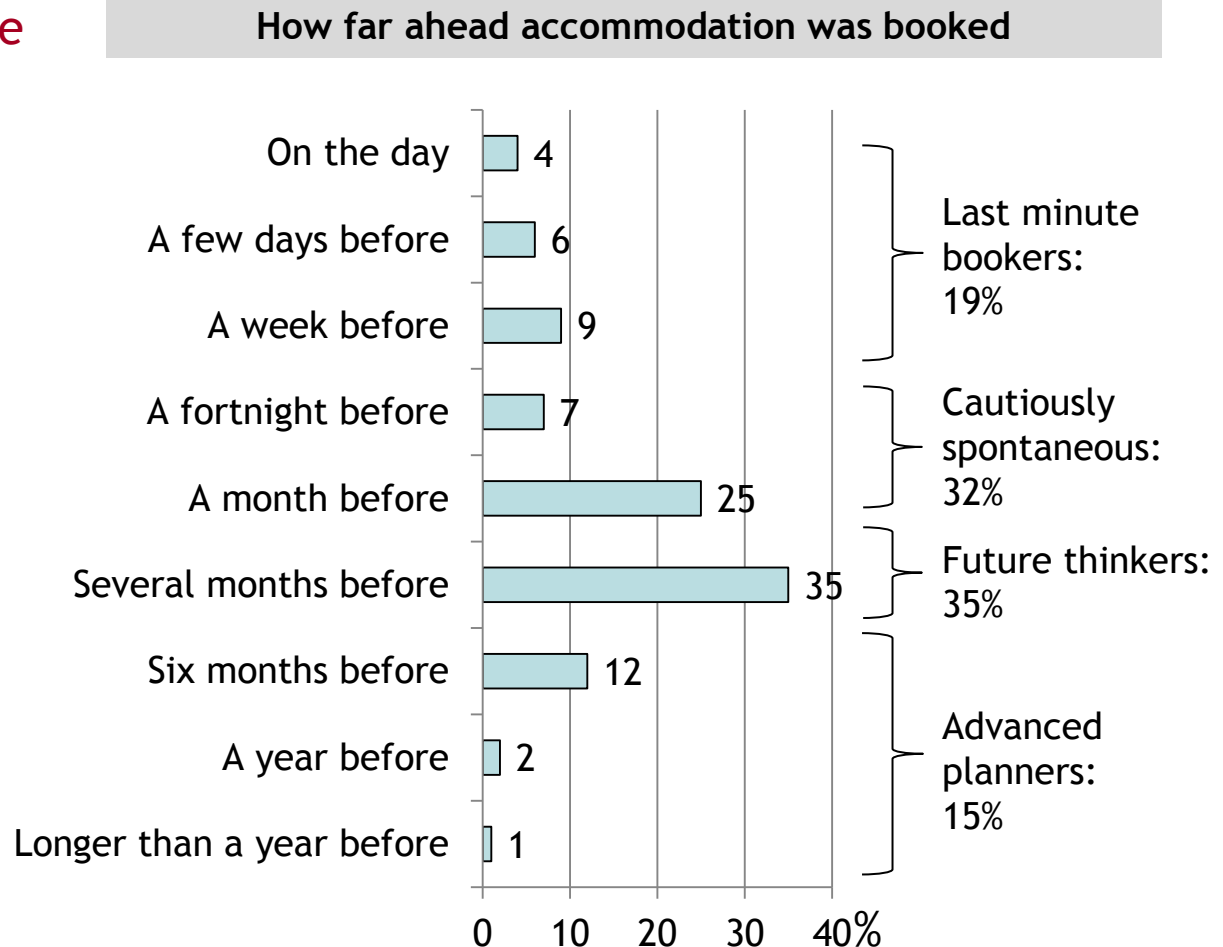
(On your last visit to Norfolk...)

29

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

→ Nonetheless, nearly a fifth book with less than a week to go - such last minute bookers are most likely to be:

⇒ Living within a two hour drive (27%), aged 18-34 (24%) and singles (23%)

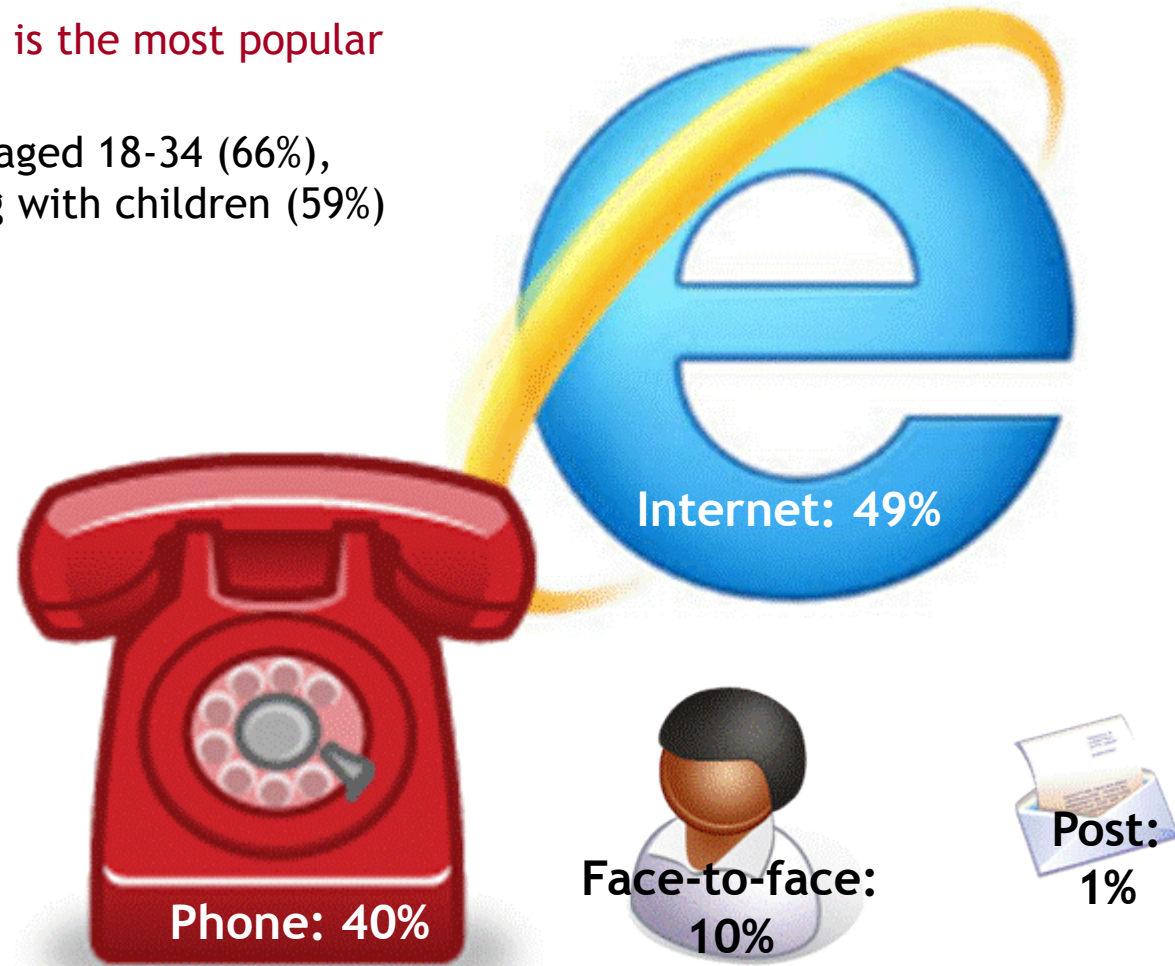


Planning accommodation: how booked

(On your last visit to Norfolk...)

30

- With nearly half saying **online**, this is the most popular way to book accommodation
 - ⇒ Particularly so amongst those aged 18-34 (66%), ABs (59%) and those holidaying with children (59%)
- Nonetheless, **booking via the telephone** is also popular
 - ⇒ This is the most preferred option for the over 55s (52%), DEs (46%) and those not taking children (46%)
- A small, but notable minority, said they booked by post (typically via newspaper vouchers)



Visit behaviour and spend

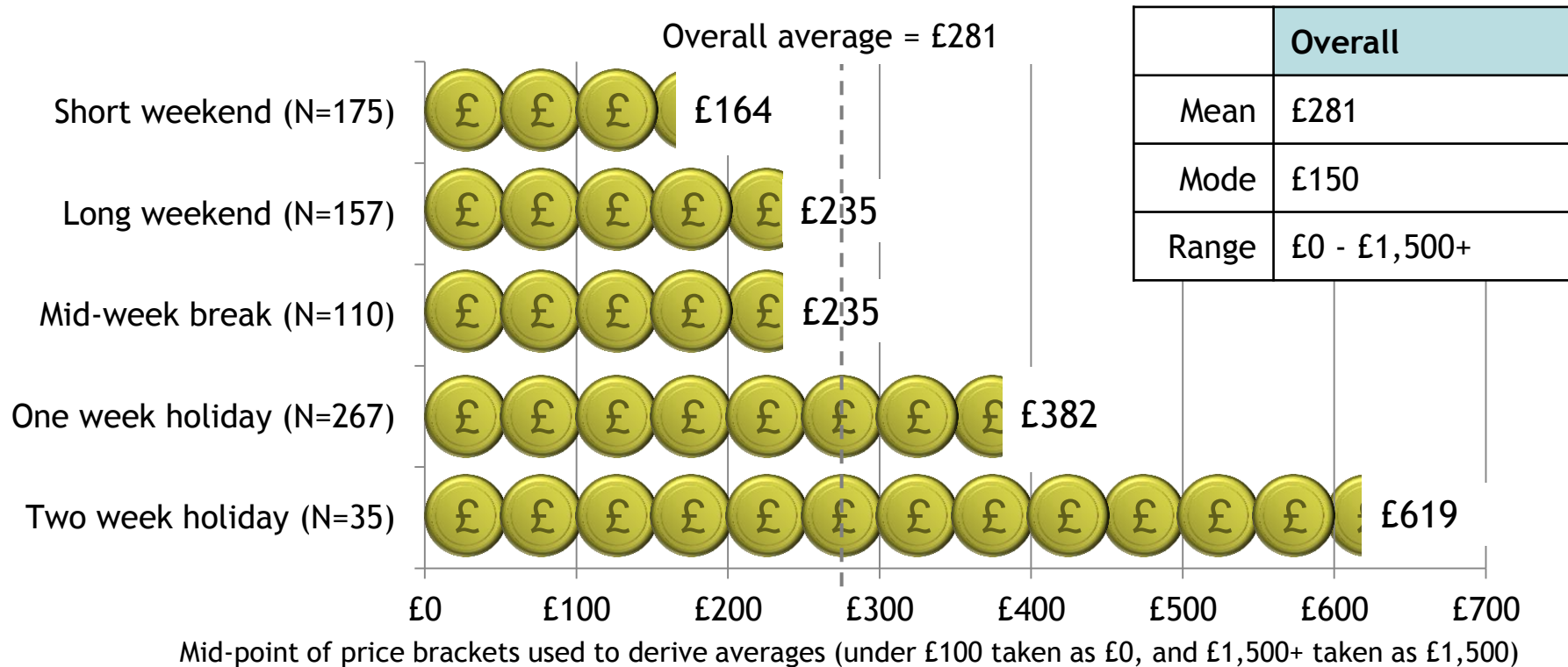
Spend: accommodation

(On your last visit to Norfolk...)



32

- As would be expected, **overall spend on accommodation increases with length of stay**
- The mean average spend is £281, although it ranged from £0 (presumably staying with relatives/own holiday home) to over £1,500



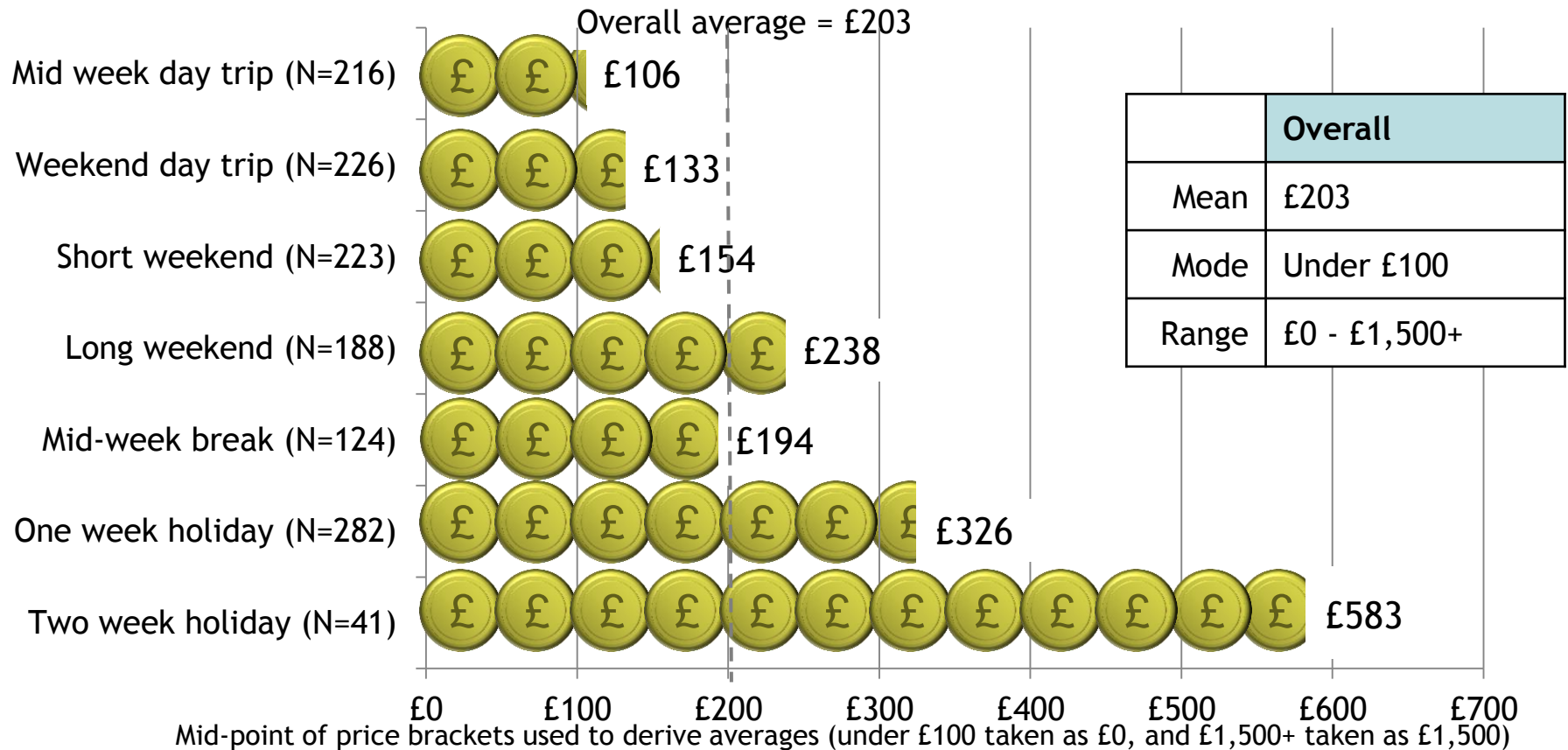
Spend: spending money

(On your last visit to Norfolk...)



33

- ➔ As with accommodation, **staying longer increases the amount of spending money**
- ➔ The mean average spend is just over £200, although again some spend nothing, while other spend over £1,500

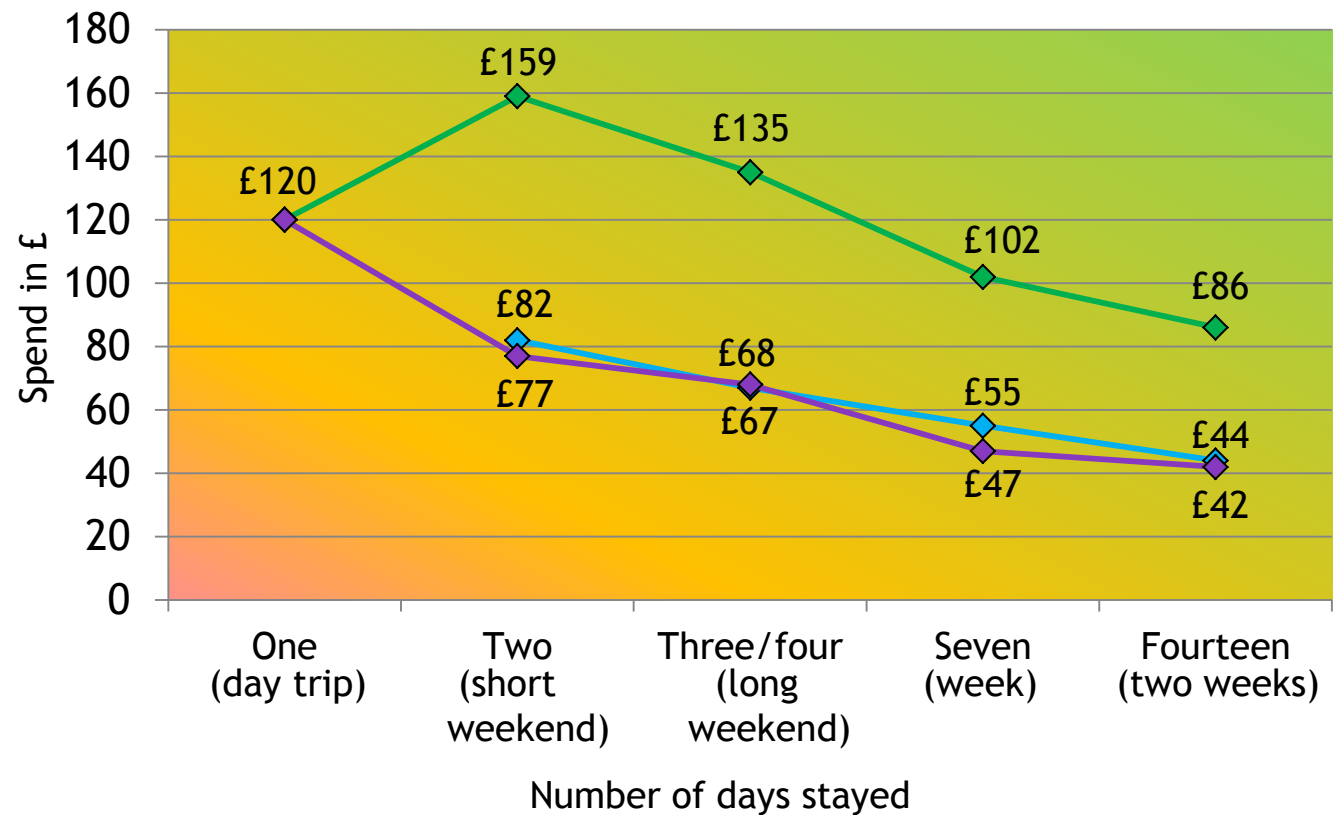
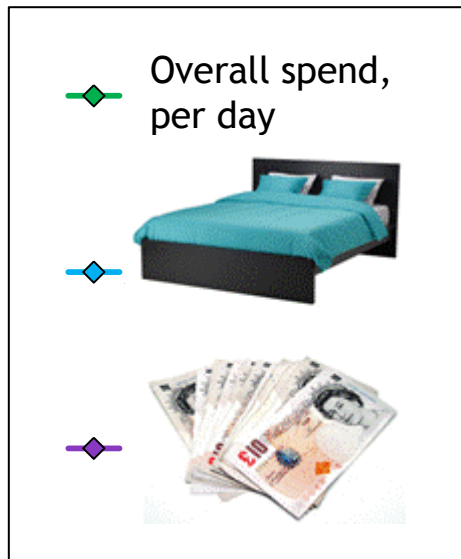


Spend per day

(On your last visit to Norfolk...)

34

- ➔ Although overall spend increases with length of stay, **spend per day actually decreases**, whereby those staying for a short weekend potentially offer the best profit margins
- ➔ Visitors typically **split their spend per day evenly between accommodation and spending money**

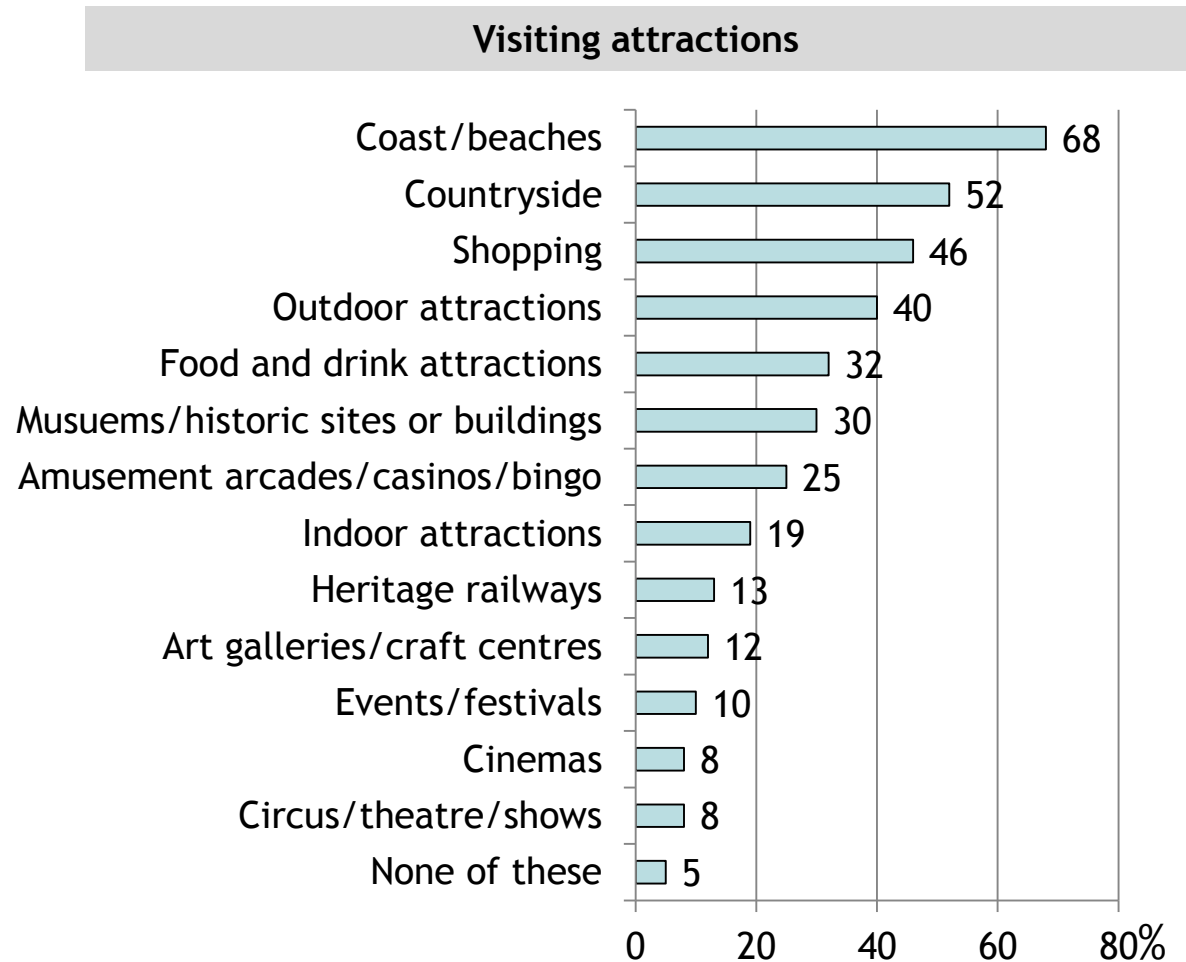


Visiting attractions

(Ever visited in Norfolk)

35

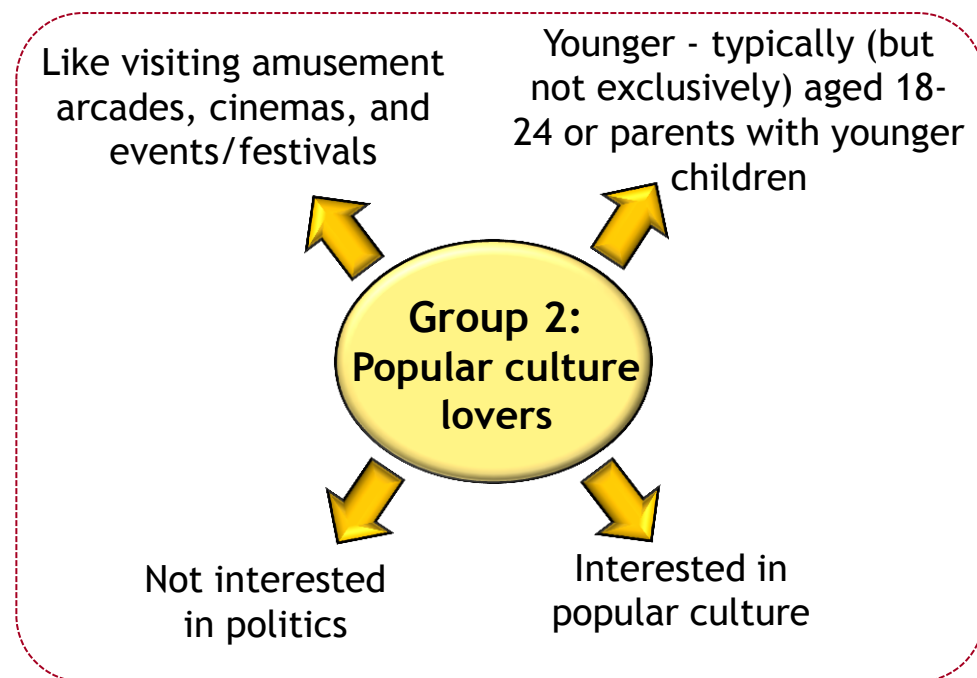
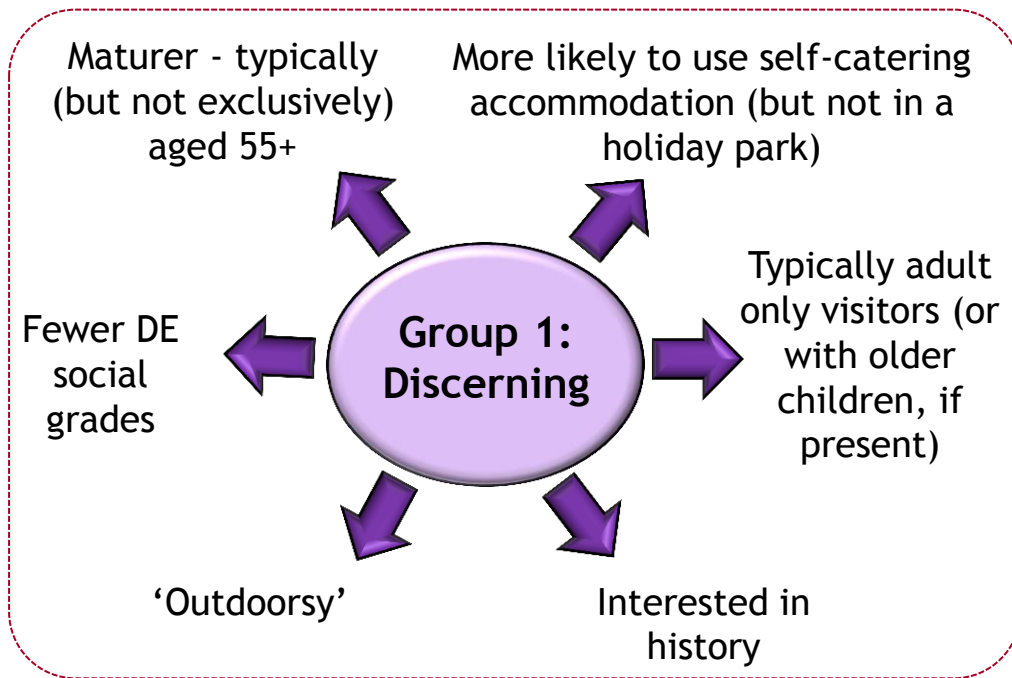
- The natural environment appears to be the most visited attraction in Norfolk with the coastal beaches and countryside appearing at the top of the list
- Shopping also appears to be a major draw, particularly amongst the more local East of England residents (48%) and women (52%)
- Although summer is the peak season for most attractions (particularly June), museums and art galleries/craft centres are also particularly visited in spring



Delving a little deeper... attraction-specific findings

36

- Looking in more detail at the profiles and behaviour patterns of those visiting Norfolk's attractions some interesting findings emerge
- Distinct overlap of interests in some instances, with two groups emerging:
 - ⇒ **Group 1 'Discerning'**: primary cluster of visitors
 - ⇒ **Group 2 'Popular Culture'**: secondary cluster of visitors

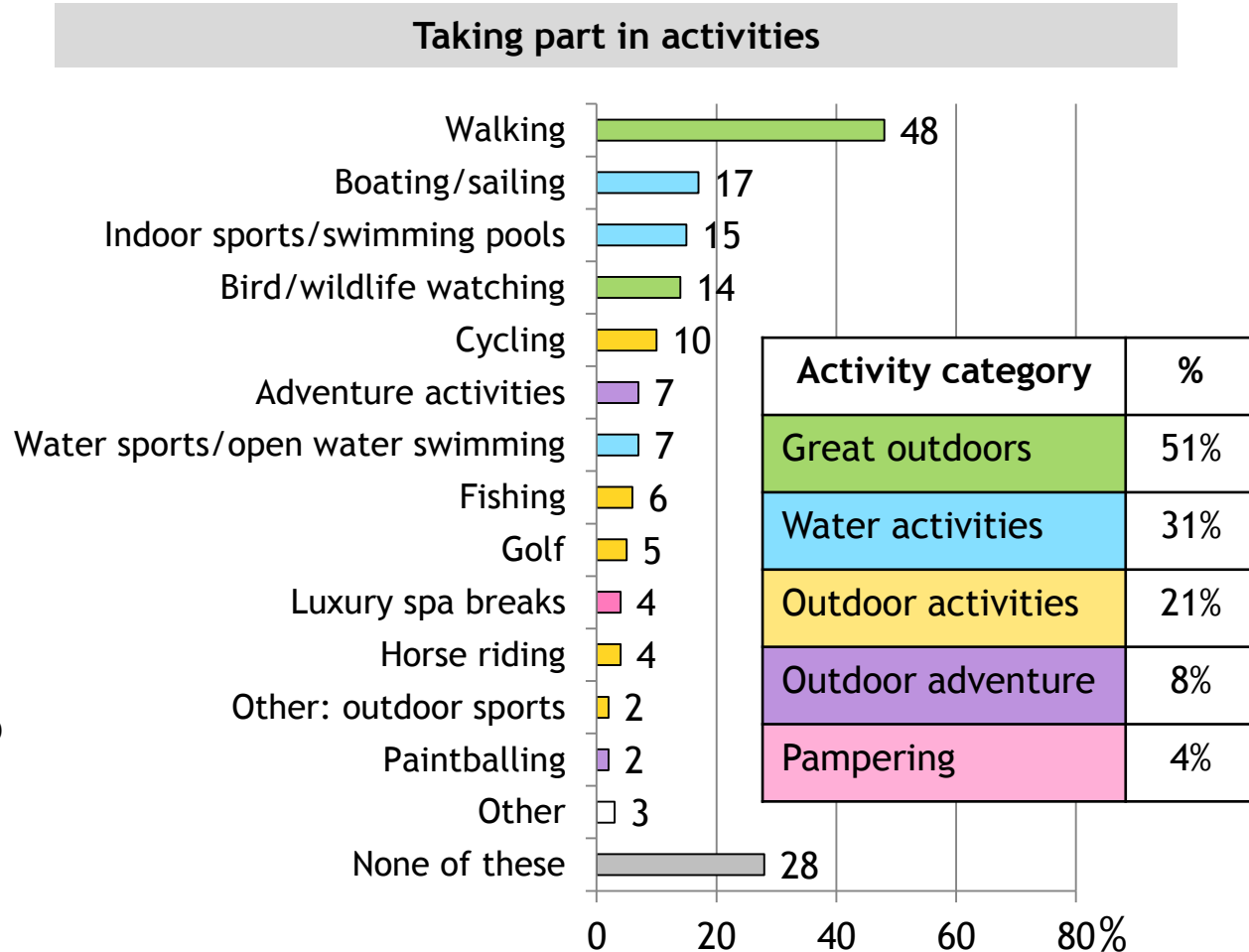


Taking part in activities

(Ever visited in Norfolk)

37

- Reflecting the key themes of why Norfolk is chosen over other UK counties, **activities in the 'great outdoors' like walking and bird watching** are some of the most popular activities in Norfolk
- **Water activities** (boating, open water swimming) are also popular
- Those with a two hour drive are significantly more likely to take part in **outdoor activities (25%), outdoor adventures (10%) and be pampered (5%)** than those from further afield



Delving a little deeper... activities-specific findings

38

- Looking in more detail at the profiles and behaviour patterns of those taking part in activities in Norfolk some interesting findings again emerge
- Distinct overlap of interests in some instances, with three groups emerging:

⇒ **Group 1: Outdoorsy and less 'DE'** - typically enjoy walking, bird-watching and/or cycling

⇒ **Group 2: Younger families** - typically enjoy indoor and outdoor sports, adventure activities and/or paintballing

⇒ **Group 3: Laid-back rural leisure** - typically enjoy fishing, golf or horse-riding

Describing Norfolk

Describing Norfolk in three words

(Key responses)

40

Scenery

Picturesque Attractive
Flat Scenic
Pretty Beautiful

Countryside

Rural Far away
Natural
Clean Quiet
Broads Green
Countryside

Weather

Windy Wet Sunny Cold

History

Traditional English
Quaint Historic Old

Overall assessment

Pleasant **Nice** Okay
Lovely Good Different

Atmosphere

Interesting
Varied Boring
Peaceful Friendly Fun
Calm Relaxing
Enjoyable

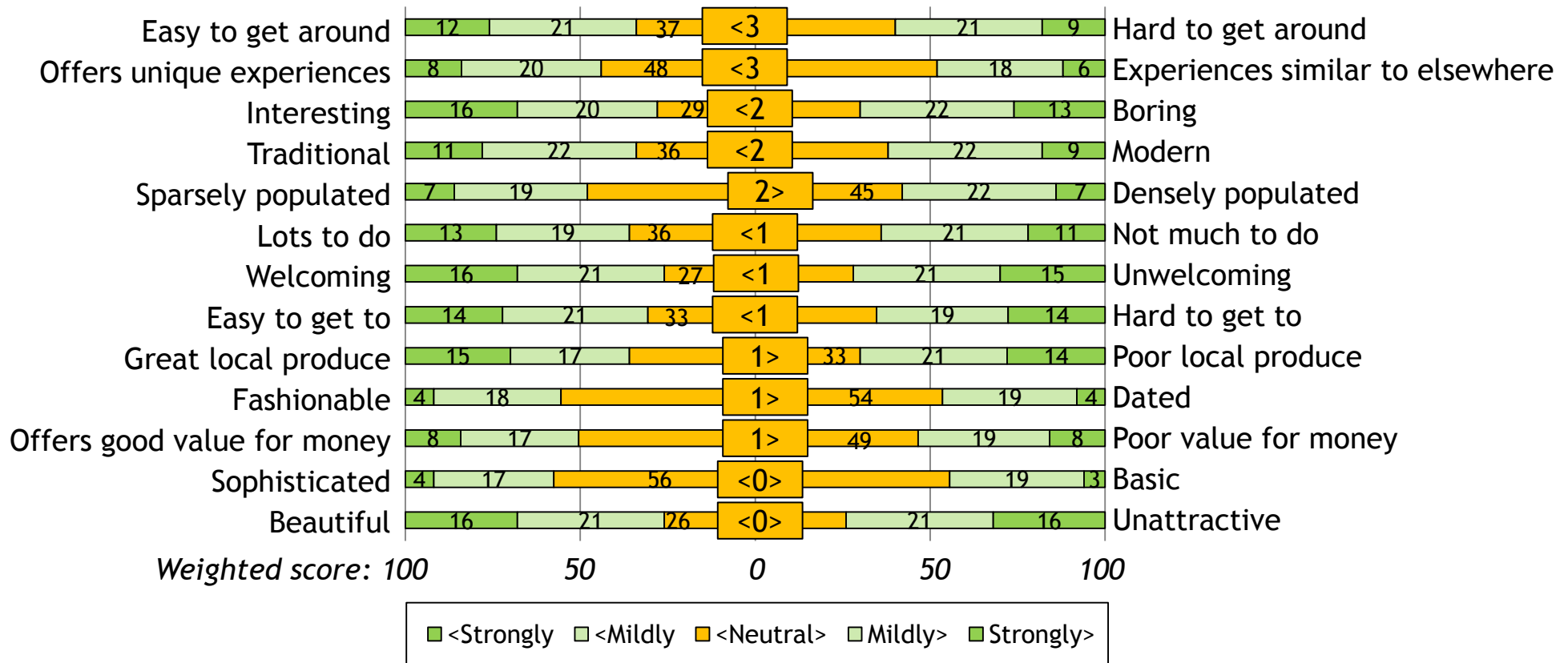
Coast

Seaside Coastal
Beaches

Norfolk associations

41

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









Perceptions and motivations to visit

Appeal of Norfolk as a leisure destination

43

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

Audience>	Overall (N=1,601)	Very recent visitor (N=524)	Recent visitor (N=351)	Non-recent visitor (N=283)	Previous visitor (N=157)	Non-visitor (N=286)
Overall evaluation>						
% saying 'quite' or 'very' appealing>	66%	82%	73%	69%	61%	29%
Mean average>	3.8	4.1	3.9	3.8	3.7	3.1

The best thing about Norfolk is...

(key themes)

44

...the lovely beaches and coastline (16%)

...the beautiful countryside (10%)

...the Broads (8%)

...the scenery (5%)

...the friendly people (4%)

...it's quiet, peaceful and relaxing (4%)

...the towns/cities - Norwich and Great Yarmouth (3%)

...the variety of things to see and do (2%)

...the wildlife and bird watching (2%)

...the towns and villages (2%)

...the food, pubs and beer (2%)



The worst thing about Norfolk is...

(key themes)

45

...the poor road network to and within (7%)

...the wet, windy, cold weather (5%)

...it's just too far away (3%)

...the flat landscape (2%)

...long traffic delays getting there (2%)

...lack of public transport (2%)

...it's boring (2%)

...it's expensive (2%)

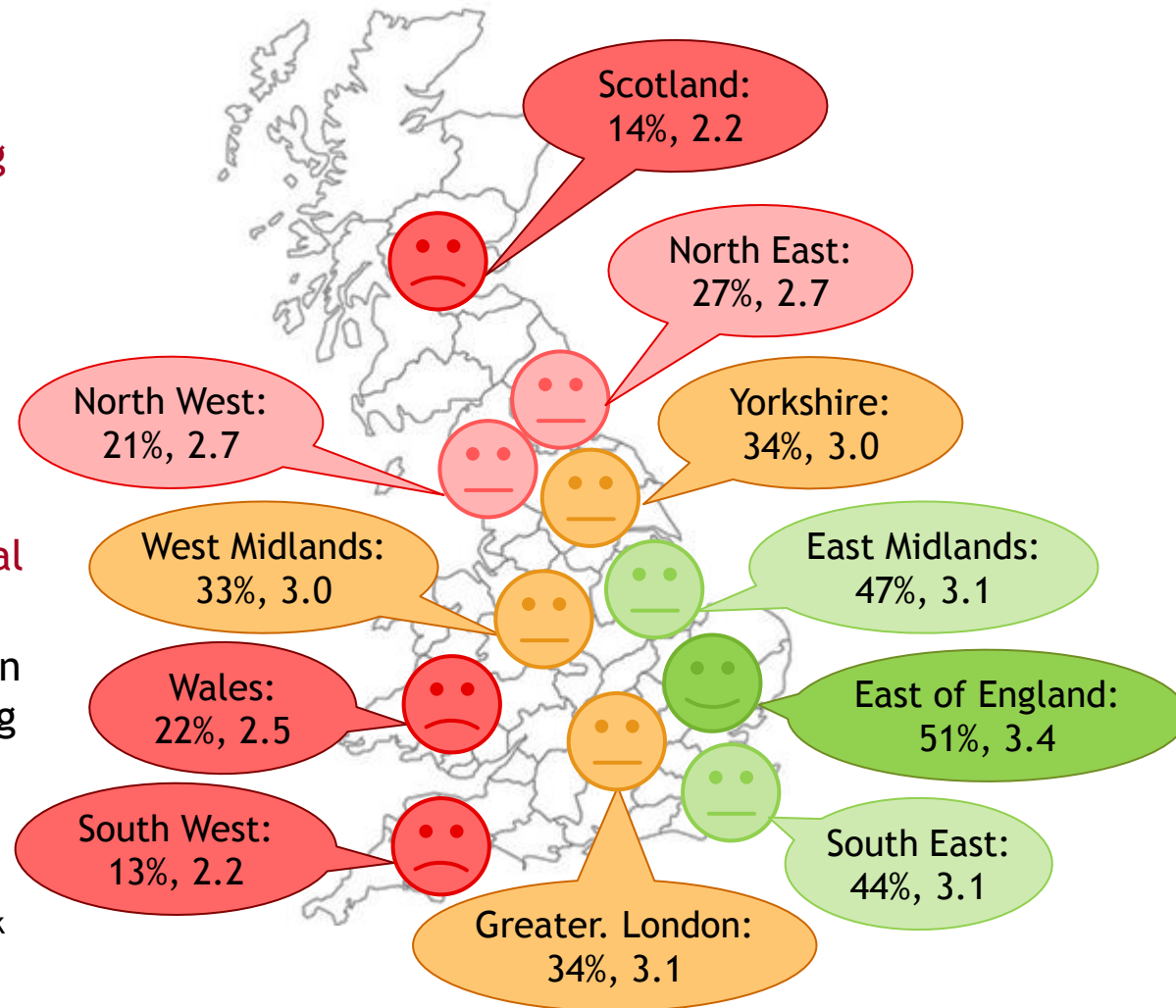


Convenience of travelling to Norfolk

46

- ➔ As might be expected, **proximity to Norfolk** is the key factor behind **perceived convenience of travelling** to the county
- ➔ Thereby, those in Scotland, Wales and the South West would find it the least convenient, whilst those living in the East Midlands and the South East find it the most
 - ⇒ However, even these more **local scores are not overly positive**
 - ⇒ In fact, only 52% of those within a two hour drive find travelling 'convenient', with **just 12%** saying 'very convenient'

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

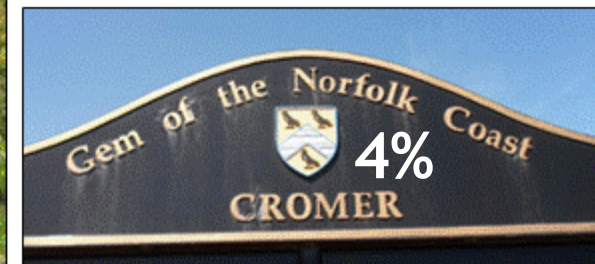
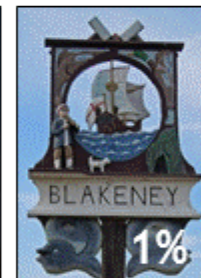
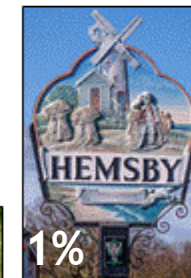
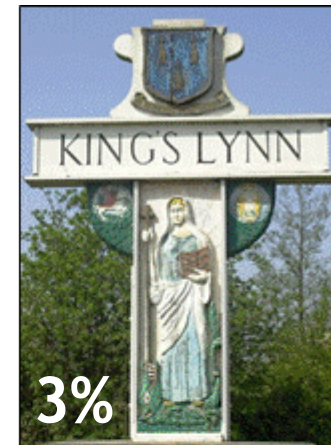
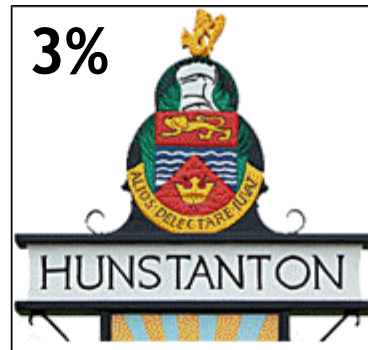


Stand out towns/villages in Norfolk

(key locations)

47

- A wide variety of villages were named a few times
- However, the key locations were generally larger towns - Norwich and Great Yarmouth particularly stood out



Specific area prompted descriptors

48

→ Respondents were provided with the following descriptors of each area

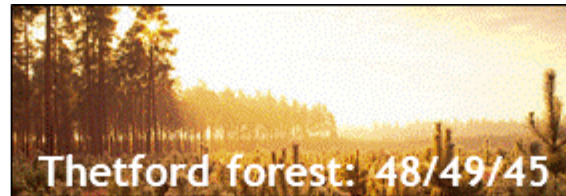
⇒ (No images were provided in the survey)

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

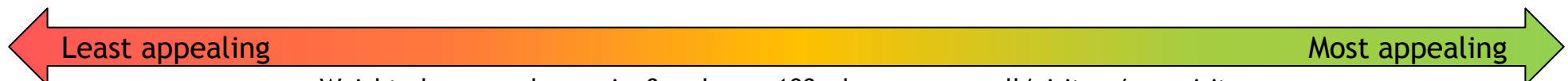
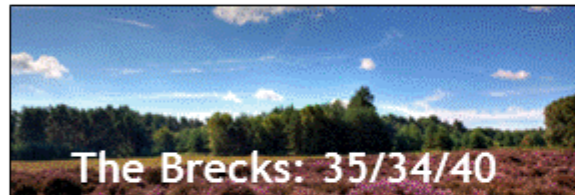
Ranking specific areas of Norfolk

49

- The **least appealing** areas are typically very rural countryside



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

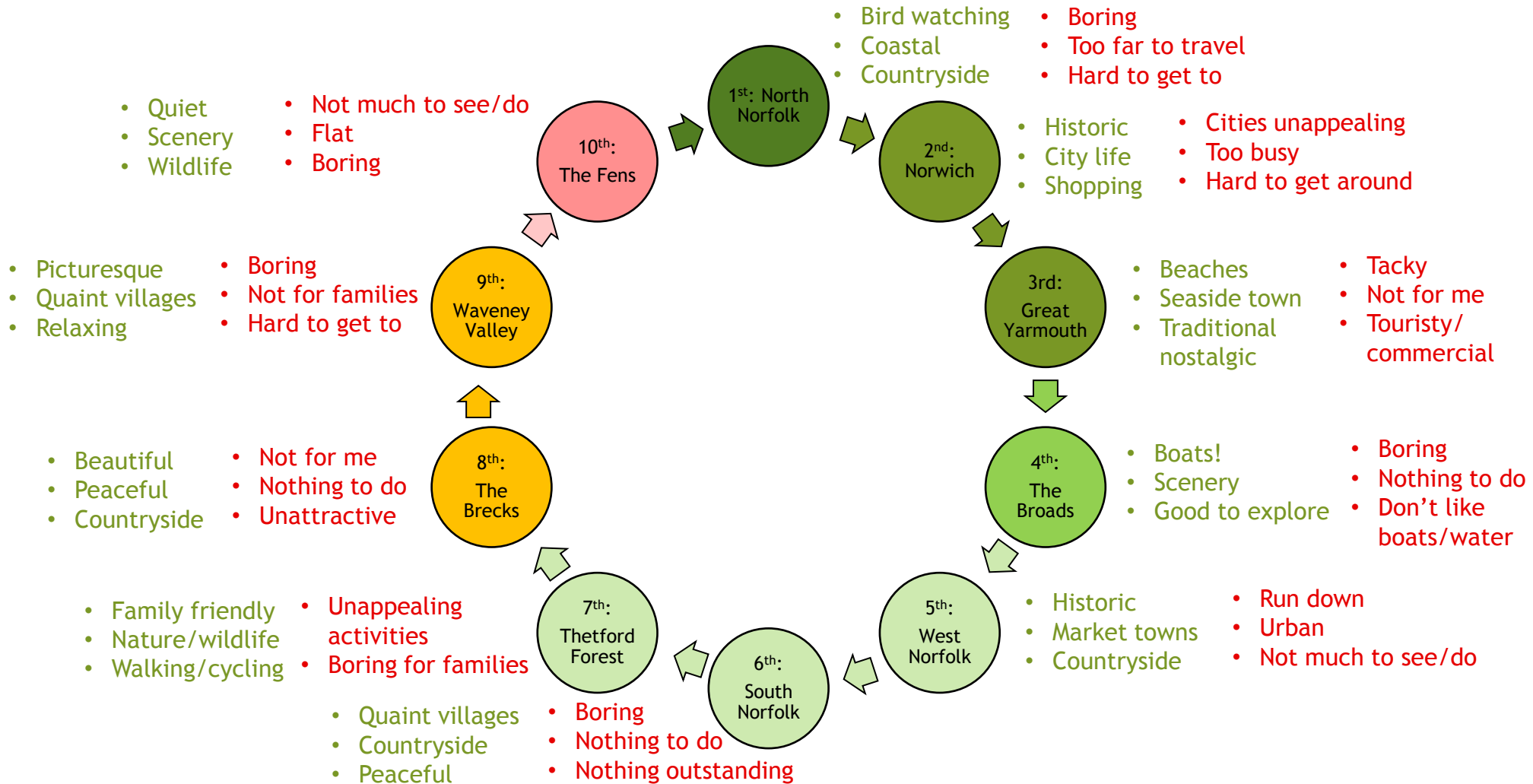


Weighted scores where min=0 and max=100, shown as overall/visitors/non-visitors

Reasons for rankings

(key themes)

50



Reasons for rankings: North Norfolk

(key themes)



1st
place

51

- North Norfolk's **coastline** is particularly appealing
 - ⇒ Notably that it's good for wildlife watching as it's not too touristy
- However, being **hard to get to** (far from anywhere else) can deter a visit

Least appealing

- ✗ **Boring**
- ✗ **Less to offer**
- ✗ **Too far to travel**
- ✗ **Hard to get to**
- ✗ **Lack of sun**

Most appealing

- ✓ **Lots of wildlife**
- ✓ **Bird watching**
- ✓ **Fishing**
- ✓ **Plenty to see and do**
- ✓ **Good pubs**
- ✓ **Camp sites**
- ✓ **Not commercial or touristy**
- ✓ **Historic villages**
- ✓ **Coastal scenery**
- ✓ **Tranquil**
- ✓ **Untouched countryside**
- ✓ **Easy transport links**

Reasons for rankings: Norwich

(key themes)



2nd
place

52

- Love it or hate it, the **association of a city offering** is a key reason for rating scores
- Having lots to do, places to eat and shop are key draws
- The **history is also an appealing aspect**

Least appealing

- ✗ Too busy
- ✗ Not relaxing
- ✗ Boring
- ✗ I don't like cities
- ✗ Dirty and crowded
- ✗ Hard to get around
- ✗ Hard to get to

Most appealing

- ✓ Historic buildings
- ✓ Lovely place to visit/picturesque
- ✓ Places to eat and drink
- ✓ Very good pubs
- ✓ Lots to see and do
- ✓ Everything you need
- ✓ Great for shopping
- ✓ Great football team
- ✓ Friendly people
- ✓ Fun for families

Reasons for rankings: Great Yarmouth

(key themes)



- ➔ The traditional, family-friendly and nostalgic seaside location is a key draw
- ➔ However, Great Yarmouth is considered too touristy, tacky and run-down by some others

Least appealing

- ✗ Tacky
- ✗ Run down
- ✗ Noisy and busy
- ✗ Touristy/commercial
- ✗ Old fashioned
- ✗ Not for me
- ✗ Poor reputation

Most appealing

- ✓ Nostalgic
- ✓ Traditional seaside town
- ✓ Seaside entertainment
- ✓ Family fun
- ✓ Lots to do
- ✓ Horseracing
- ✓ Lovely beaches
- ✓ Natural Beauty

Reasons for rankings: the Broads

(key themes)

4th
place

54



- ➔ The Broads are a **unique and scenic boating location**
- ➔ Nonetheless, for those who don't like boats or water, there is **perhaps not much to do**

Least appealing

- ✗ Boring
- ✗ Not enough for families to do
- ✗ Not much to do
- ✗ Remote: not easy to get to
- ✗ Don't like water
- ✗ Not ideal for walking
- ✗ Dirty and muddy
- ✗ Not keen on boats
- ✗ Crowded

Most appealing

- ✓ Adventurous
- ✓ Boats!
- ✓ Unique area
- ✓ Marshland: birds and wildlife
- ✓ Relaxing
- ✓ Scenic and beautiful
- ✓ Unspoiled villages and market towns
- ✓ Good local food
- ✓ Good to explore
- ✓ Good value for money

Reasons for rankings: King's Lynn and West Norfolk

(key themes)

- The **historic and traditional feel** of King's Lynn and other towns in West Norfolk is appealing
- However, some see the area as being **too urban and industrial**, with a feeling that it's a bit run down



5th
place 55

Least appealing

- ✗ Run down
- ✗ Industrial
- ✗ Too urban
- ✗ Feels unwelcoming
- ✗ Too far away
- ✗ Boring
- ✗ Not so much to see or do

Most appealing

- ✓ Friendly people
- ✓ Lovely market towns and villages
- ✓ Traditional feel
- ✓ Historic places to visit
- ✓ Lots of attractions
- ✓ Good shopping and amenities
- ✓ Good caravan sites
- ✓ Lovely seaside
- ✓ Relaxing
- ✓ Beautiful countryside

Reasons for rankings: South Norfolk

(key themes)



6th
place

56

- The **peaceful and unspoilt villages** of South Norfolk are particularly appealing
- However, some feel that this area is **boring and has little to offer** both in terms of activities and in landscape

Least appealing

- ✗ **Nothing to do**
- ✗ Too isolated
- ✗ **Boring**
- ✗ No coastline
- ✗ No outstanding features
- ✗ Unappealing villages

Most appealing

- ✓ Beautiful countryside/nature
- ✓ Peaceful
- ✓ Unspoilt/historic
- ✓ Things to do
- ✓ Independent shops
- ✓ Quaint villages
- ✓ Easy to get to
- ✓ Beer!

Reasons for rankings: Thetford Forest

(key themes)



7th
place

- Thetford Forest is seen as **good for walking, cycling and family fun**, while being in the **peaceful outdoors** is also notably appealing
- However, for those who don't enjoy these types of activity, the **area can be viewed as boring**

Least appealing

- ✗ Boring for children and families
- ✗ Not much to do
- ✗ Don't enjoy cycling or walking
- ✗ Don't like woodland
- ✗ Non-native forestry
- ✗ Poor location

Most appealing

- ✓ Family friendly
- ✓ Lot of activities available
- ✓ Great for cycling
- ✓ Great for scenic walking
- ✓ Dog friendly - lots of walks
- ✓ Nature and wildlife
- ✓ Peace and quiet
- ✓ Good for camping

Reasons for rankings: the Brecks

(key themes)



8th
place

58

- The beautiful and peaceful scenery of the Brecks make it ideal for outdoor activities and photography
- However, some feel strongly that its 'not for them' as they don't like the activities on offer and find the landscape unappealing

Least appealing

- ✗ Not for me
- ✗ Don't like walking or hiking
- ✗ Too quiet
- ✗ Not much to do
- ✗ Unappealing landscape

Most appealing

- ✓ Good for cycling and outdoor activities
- ✓ Peaceful and relaxing
- ✓ Countryside
- ✓ Beautiful scenery
- ✓ Good for photography
- ✓ Historic
- ✓ Cheap

Reasons for rankings: Waveney Valley

(key themes)

9th
place



- The **picturesque and quaint villages** in Waveney Valley make it particularly appealing for some
- However, others find this area **quite boring and uninteresting**, particularly those that feel there's not much for families

Least appealing

- ✗ Boring
- ✗ Uninteresting
- ✗ Not much for families
- ✗ Old fashioned
- ✗ Hard to get to
- ✗ Never heard of Waveney Valley
- ✗ Too expensive

Most appealing

- ✓ Picturesque scenery
- ✓ Relaxing
- ✓ Enjoyable to visit
- ✓ Quaint villages and towns

Reasons for rankings: the Fens

(key themes)



Last
place

60

- The majority feel that there's **not much to see or do** in this area and describe the scenery as 'flat'

Least appealing

- ✗ Too remote
- ✗ Not much to see
- ✗ A bit barren
- ✗ Unappealing landscape
- ✗ Flat
- ✗ Poor and slow roads
- ✗ Boring
- ✗ Not family fun
- ✗ Not much to do

- Nonetheless, the **quiet and rural Fens** appeal to **others** as being a good location for walking and watching wildlife

Most appealing

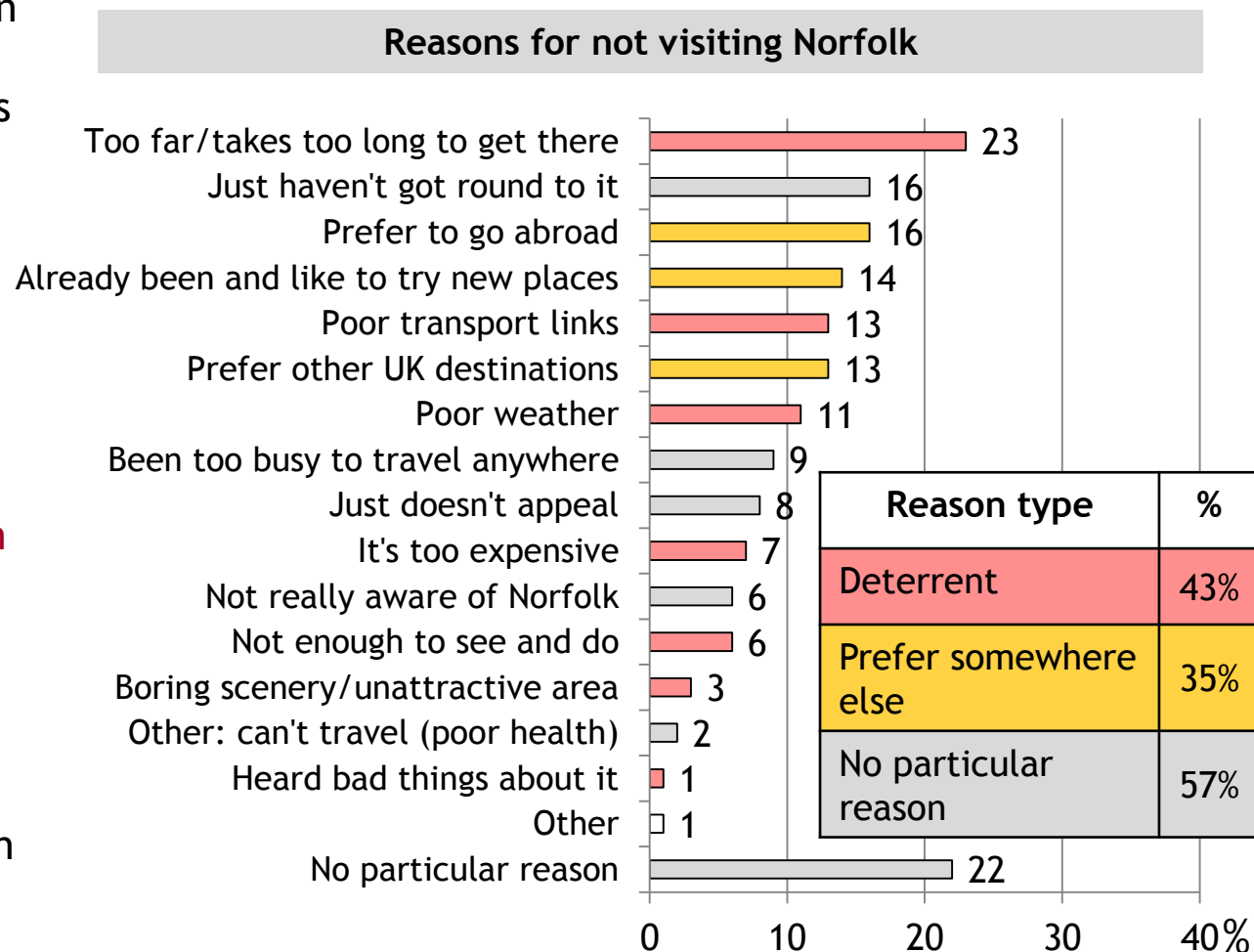
- ✓ Quiet
- ✓ Less populated
- ✓ Good for walking
- ✓ Wildlife
- ✓ Lovely scenery

Overcoming barriers

Reasons for not visiting Norfolk

62

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



Making Norfolk more appealing to visit

(key themes)

63

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

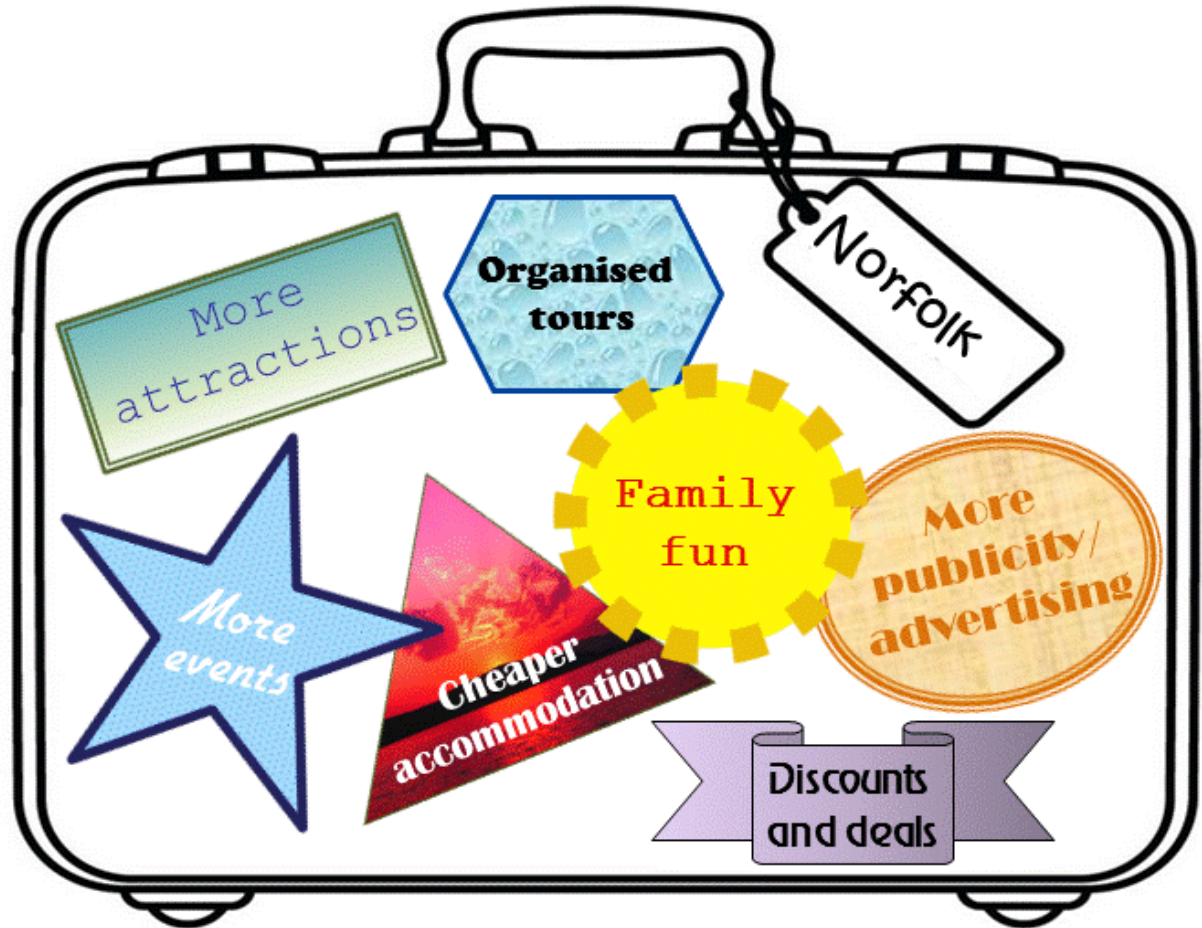


Staying longer than a day trip

(key themes)

64

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



Comparative appeal

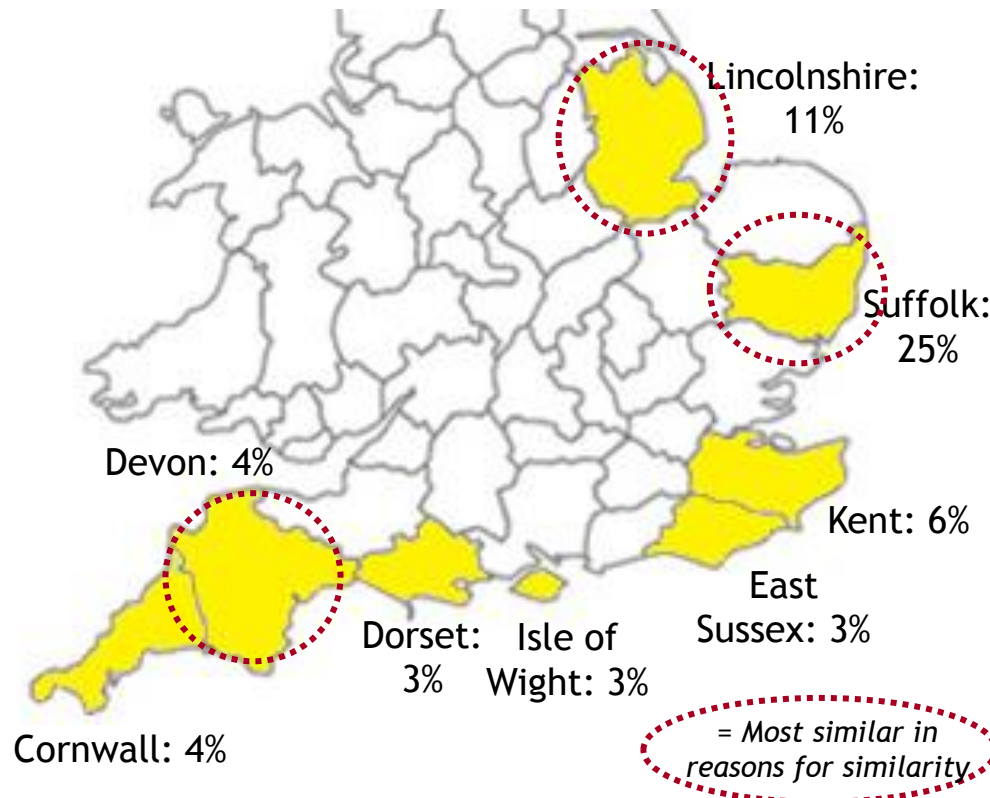
Counties most similar to Norfolk

(key themes)

66



→ The main counties likened to Norfolk were typically either **on the South coast** or **neighbouring Norfolk itself**

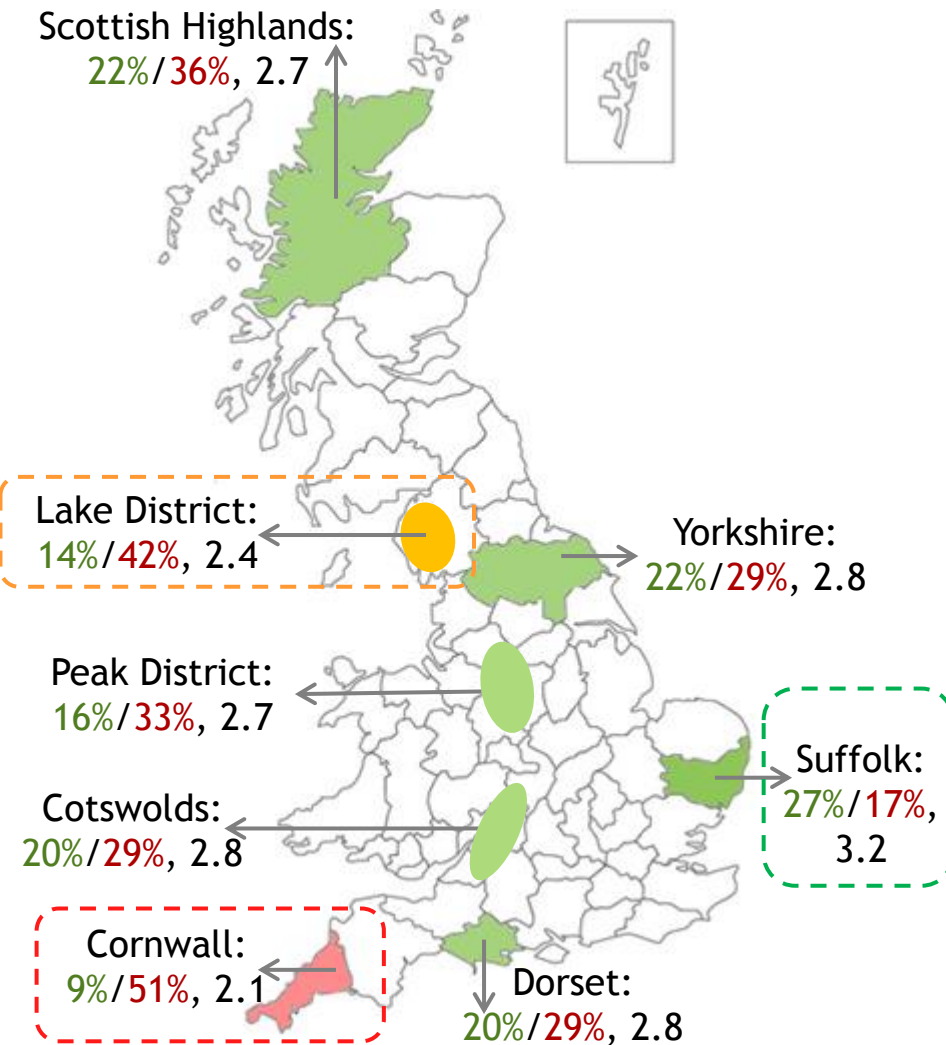


Appeal of Norfolk compared to other UK destinations 67

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

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

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



Consideration/choice of other destinations

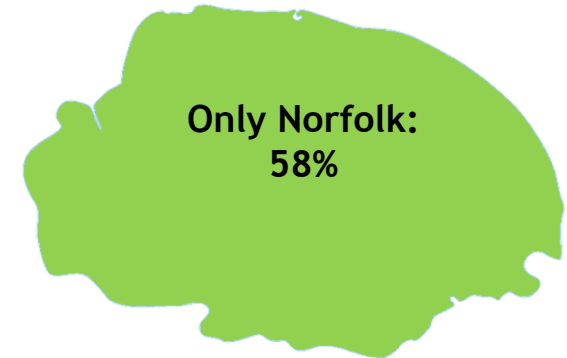
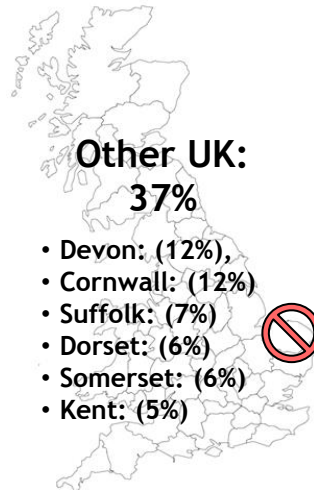
(On your last visit to/consideration of Norfolk...)

68

- On their last visit, **over half (58%)** were **only considering Norfolk** as a destination

- ⇒ The **majority of other areas being considered were in the UK** - most commonly Devon and Cornwall

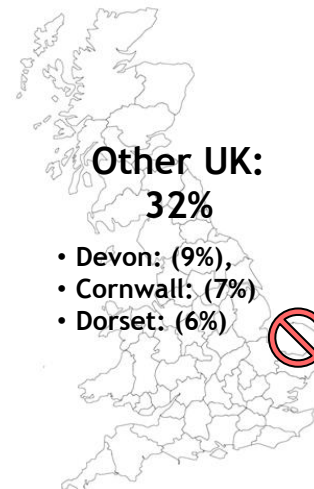
Visitors considered



- Around **a third (35%)** of **non-visitors** have **considered visiting Norfolk**, of these:

- ⇒ Half decided **not to go anywhere**
- ⇒ **Locations abroad** seem over twice as appealing to this group to those who do visit Norfolk

Non-visitors went



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

Q: The last time you decided to visit Norfolk for leisure, were you also considering other destinations?

Base: 101 (those who have not ever visited Norfolk, but have considered it) - prompted, single response

Q: Did you choose another UK destination over Norfolk?

Q: Which UK counties were you considering/did you choose instead?

Why Norfolk? *(key themes)*

69

- Although some **practical issues** emerged such as cost, and proximity (particularly amongst those within a two hour drive), Norfolk appears to have to key draws:

- **Scenery:**

- ⇒ Coastal (particularly in sunny weather!) and countryside

- **Outdoors activities:**

- ⇒ Such as bird watching and cycling



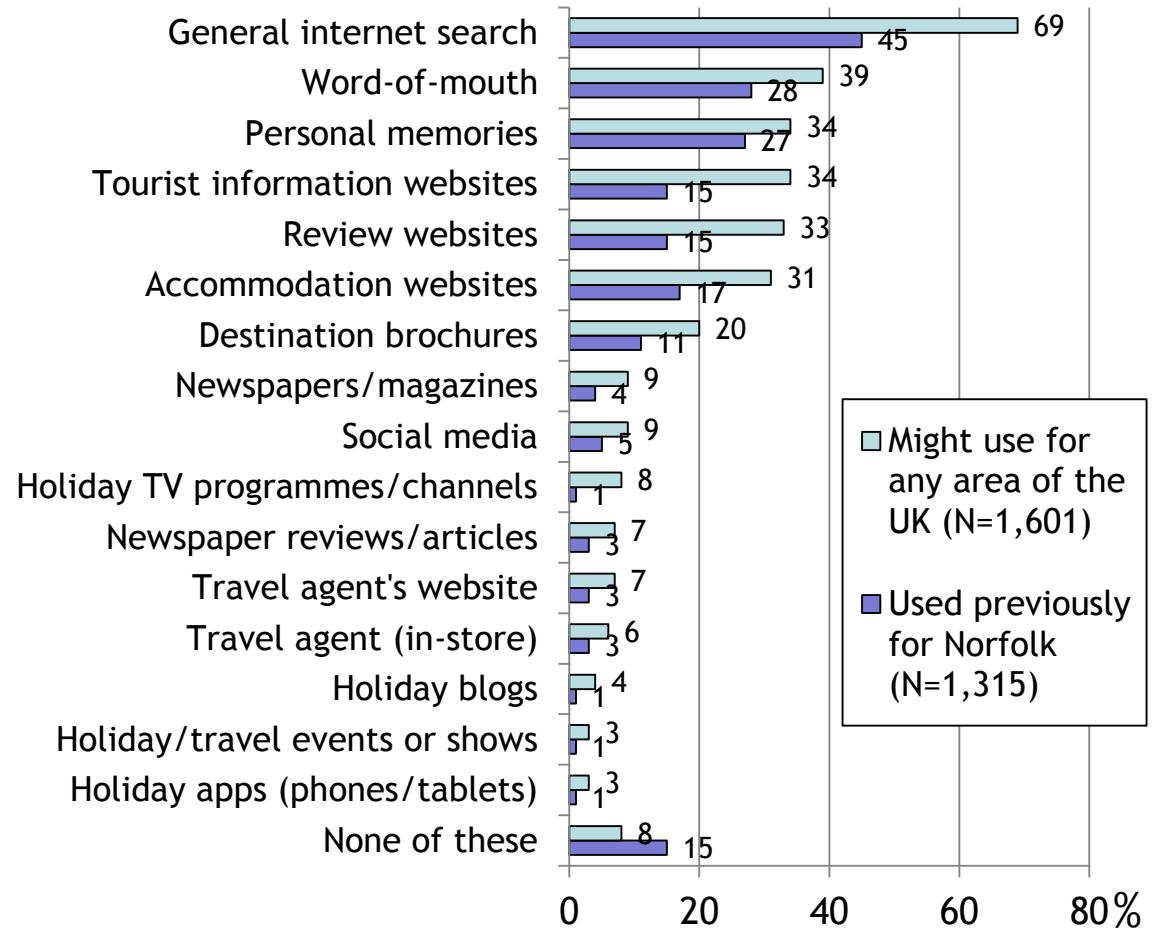
Information sourcing and communication

Holiday information sourcing

71

- As with planning accommodation, more general information sourcing about UK (and specifically Norfolk) holidays is **most typically done online**
- Again **personal connections** (word-of-mouth and memories) are also key
- When searching for information about Norfolk, those within a two hour drive are significantly **more likely to have used social media (8%)** and less likely to have used destination brochures (8%), accommodation and tourist information websites (both 13%) than those living further away

Information sources for UK/Norfolk holidays



Holiday information sourcing: tourist information sites₇₂

- Visit Norfolk was the prominent tourist information website from this prompted selection

- ⇒ Particularly used by visitors aged 55+ (60% have used)

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

Websites used for information about Norfolk holidays

Used: 46% / might use: 63%

Visit Norfolk
The **official** visitor website for Norfolk

 tripadvisor®

Used: 34% / might use: 49%

 VisitBritain™

Used: 14% / might use: 13%

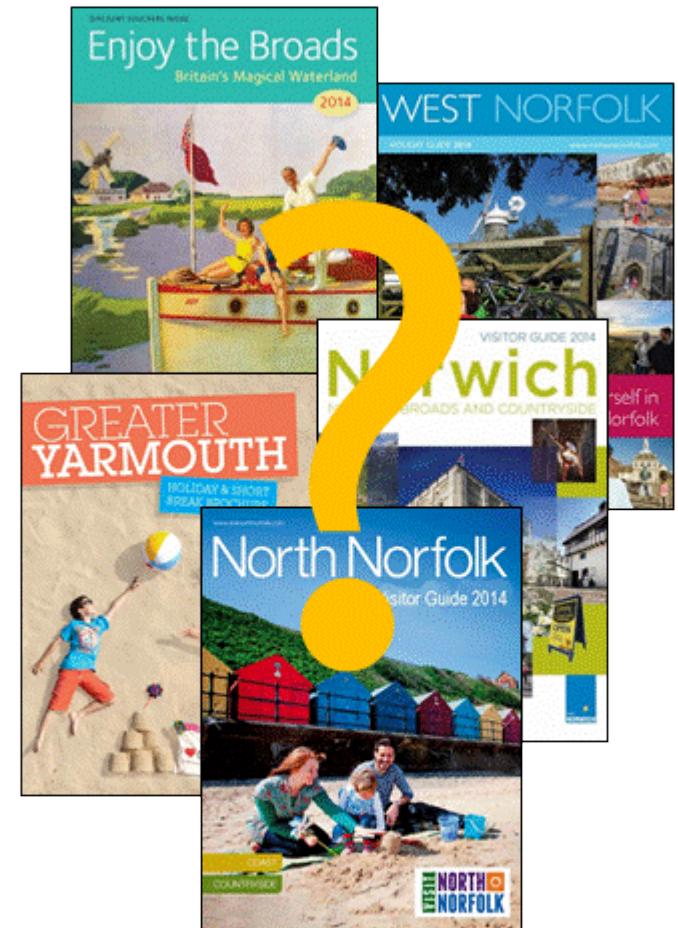
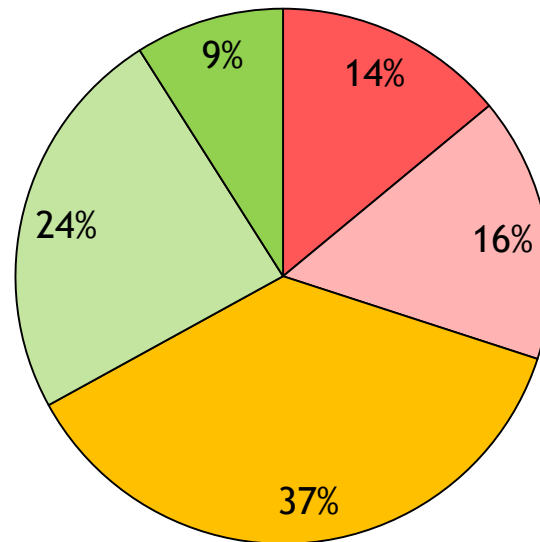
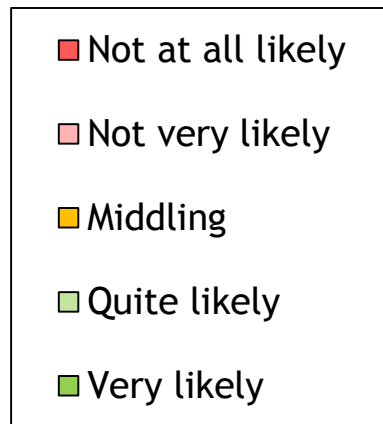
VisitEngland 

Used: 34% / might use: 34%

Potential use of destination brochures

73

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



Internet search terms

(Key words)

74

- Search terms typically consisted of a theme... (attractions, accommodation or tourism in general)followed by 'in Norfolk' or occasionally a more specific location such as 'in the Broads' or 'in Norwich'

Norfolk!

Events / activities / attractions

Places to go/visit

Trip

Leisure

Things to do

Attractions

Activities

Accommodation

Cottages

Hotels

Accommodation

Tourism

Holiday

Tourist
information

Specific areas / locations

Norwich

Coast

Beaches

Broads







Great Yarmouth

Future visits and recommendations

Likelihood of visiting Norfolk in the future

76

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

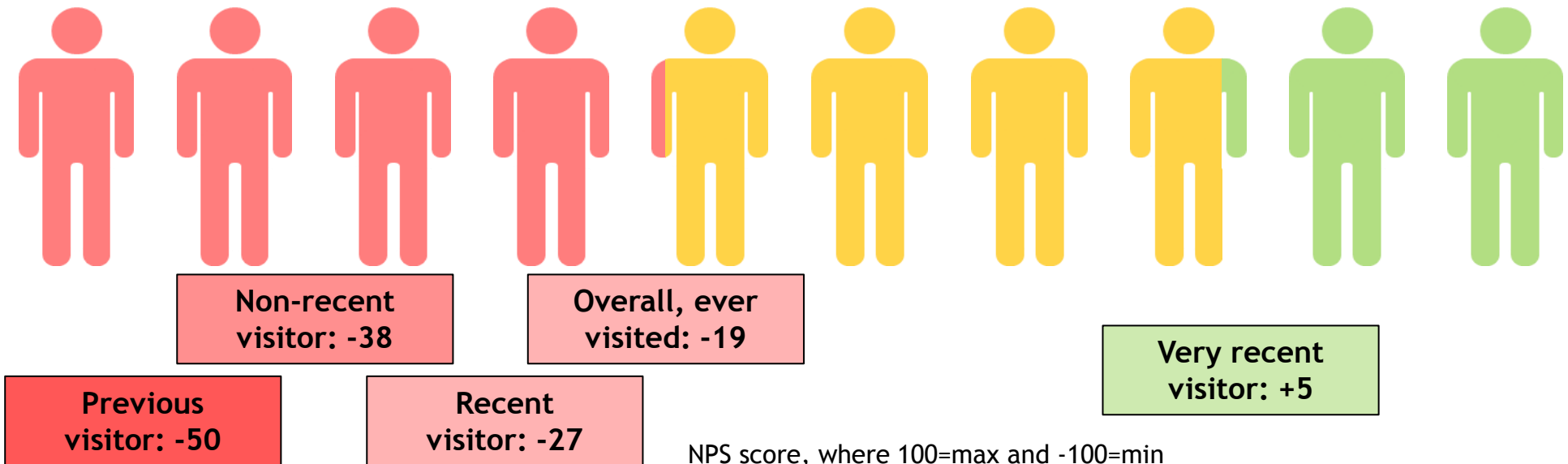
Audience>	Overall (N=1,601)	Very recent visitor (N=524)	Recent visitor (N=351)	Non-recent visitor (N=283)	Previous visitor (N=157)	Non-visitor (N=286)
Overall evaluation>						
% saying 'quite' or 'very' likely>	58%	83%	63%	49%	34%	28%
Mean average>	3.6	4.2	3.7	3.4	3.1	2.9

Net promoter score

77

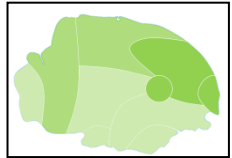
- Net promoter scores (likelihood of active recommendations) were generally low, even amongst recent visitors
 - ⇒ Those within two hours also scored quite negatively at -11
- Very recent visitors are the most likely group to recommend a visit to Norfolk to a friend, although this is still only a moderate NPS score

Would you recommend a visit to Norfolk to a friend?

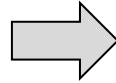


Summary

Summary: awareness and perceptions of specific areas₇₉



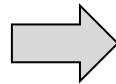
Spontaneous recollection of Norfolk is limited



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



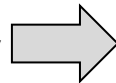
Urban areas are both the most visited and most appealing destinations



Great Yarmouth and Norwich are the most visited areas, and are in the top three areas in terms of appeal. Both also 'stood out' the most, with Cromer also a potential draw



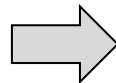
The Broads stands out as particularly popular area



Well visited, and praised for scenic boating and wildlife, the Broads are appealing to most and reasonably well known



However, more rural areas are less appealing



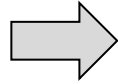
The heathlands and marshlands of the Brecks and the Fens are notably less appealing than most other areas of Norfolk, and also have very low top-of-mind presence

Summary: appeal and barriers

80



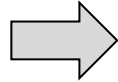
Being a coastal county seems to be Norfolk's biggest asset



The coastline/beaches are the most visited attraction and the most frequently mentioned 'best thing' about the county. They also play an important role in choosing Norfolk over other UK holiday locations



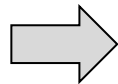
The 'great outdoors' is also key to Norfolk's appeal



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



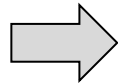
Poor transport links are the main barrier to visiting



Poor road networks were the most frequently mentioned 'worst thing' about Norfolk, with better public transport and better roads appearing at the top of the list of ways to make the county more appealing to visit



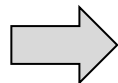
Once in Norfolk, some feel there is not much to do



Being boring, with little to see and do were key reasons for poor rankings of the different areas, while being 'flat' was a commonly used descriptor for the county



Norfolk is similar to counties on the South coast... but perhaps less appealing



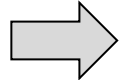
Counties in the South West are the key competitor set for consideration, and although Norfolk scores about the same as Dorset, Cornwall is seen as notably more appealing as a holiday destination

Summary: holiday behaviours and planning

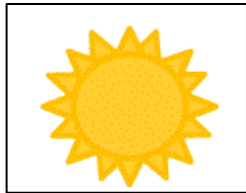
81



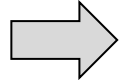
Visits are typically quite short



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



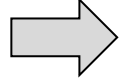
Summer is the crucial holiday season



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



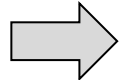
The internet is key for planning



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



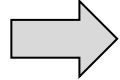
Visit Norfolk's website is particularly popular



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



Daily spend is highest on short breaks



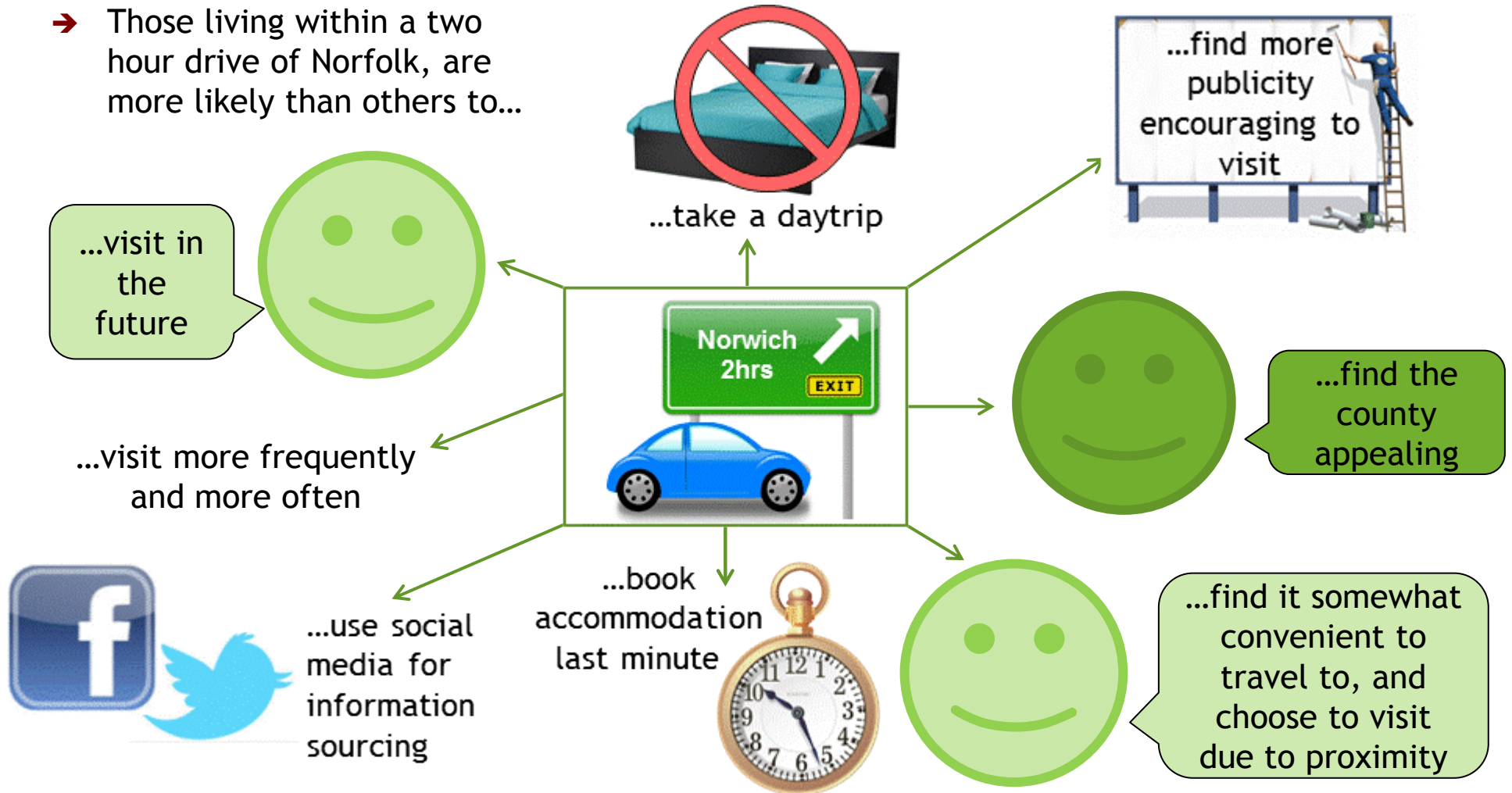
Those only staying for two days spend, on average, twice as much per day than those staying for two weeks

Summary:

Focus on those living within a two hour drive

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



SWOT analysis

SWOT: Strengths

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



SWOT: Weaknesses

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

SWOT: Opportunities

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

SWOT: Threats

87



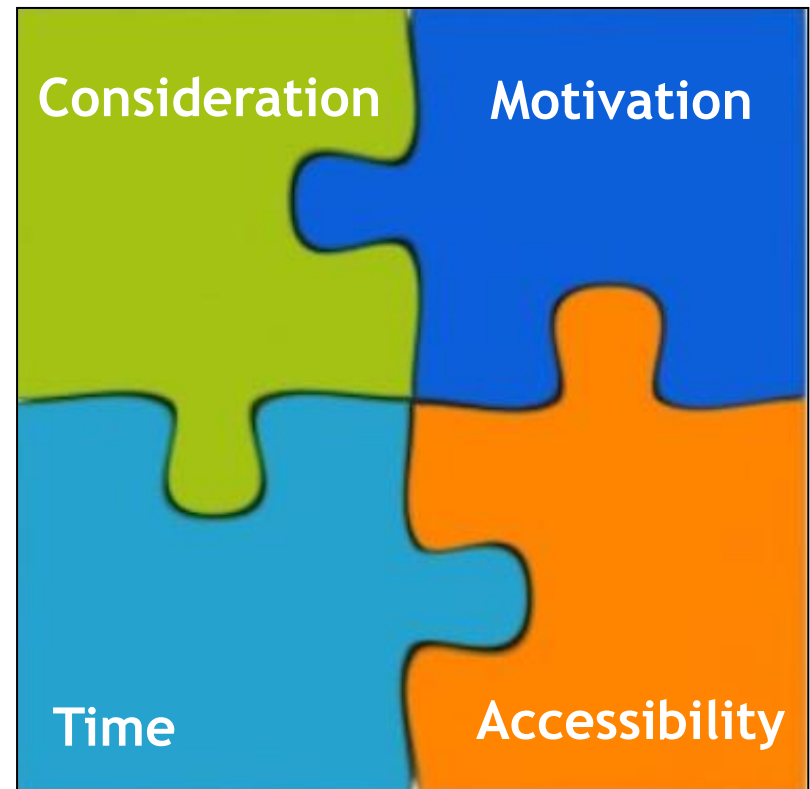
- Whilst promoting positive word of mouth is key, the Net Promoter Score (NPS) for Norfolk is low which is an area of concern moving forwards
- Norfolk clearly has a diverse offering, but these aren't well-known and attitudes of "Boring/"Nothing to do" might be hard to shift on the macro scale
- At the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

Considerations

Considerations

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- ➔ Just 'being there' is not enough to motivate visit; potential visitors need to be given **reasons to visit**
- ➔ There appears to be an opportunity to more strongly '**place**' Norfolk in the minds of people as a leisure destination and compete more strongly with other UK locations
- ➔ ...and in doing so to encourage visitors by getting people to:
 - ⇒ ...**CONSIDER** Norfolk as a leisure destination
 - ⇒ ...be **MOTIVATED** to visit
 - ⇒ ...realise they do have the **TIME** to visit (and that there are resources available to help plan their trip)
 - ⇒ ...overcome preconceptions about **ACCESSIBILITY** in and around Norfolk



Considerations: Barriers and Enablers

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

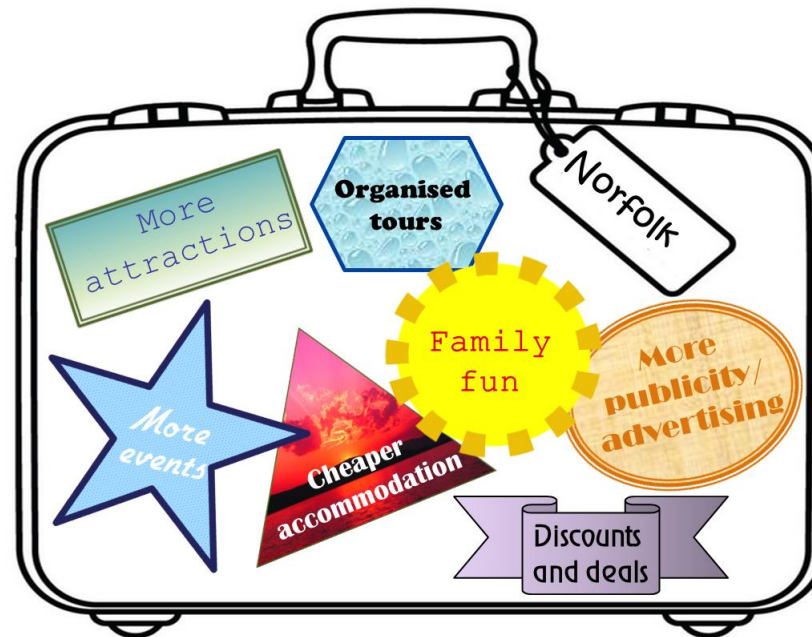


Considerations:

Encouraging day-trippers to become stay-trippers

91

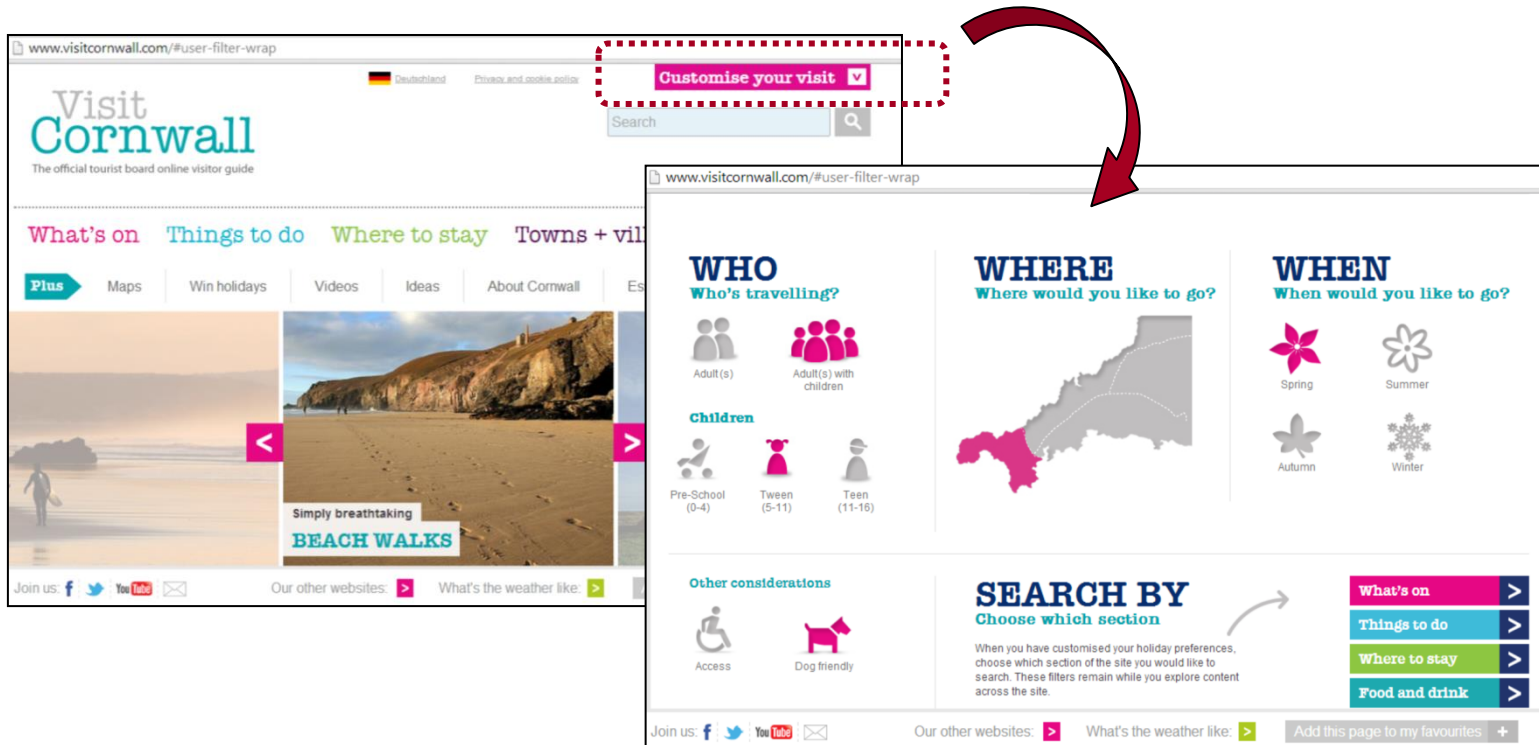
- Looking at what might encourage day-trippers to become stay-trippers, much centres on having “more to do” (events and attractions), cheaper accommodation, organised tours, discounts and more publicity about Norfolk’s offering. Consideration might therefore be given to:
- ⇒ Better enabling a more customised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



Considerations: Customisation & Website optimisation

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



Considerations: Suggesting Itineraries

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

**5 x
Wildlife
Itineraries**

**5 x
Food-Lovers’
Itineraries**

**5 x
Family
Itineraries**

**5 x
Action-Junkie
Itineraries**

**5 x
Relaxation
Itineraries**

**5 x
Walking
Itineraries**

**5 x
Cycling
Itineraries**

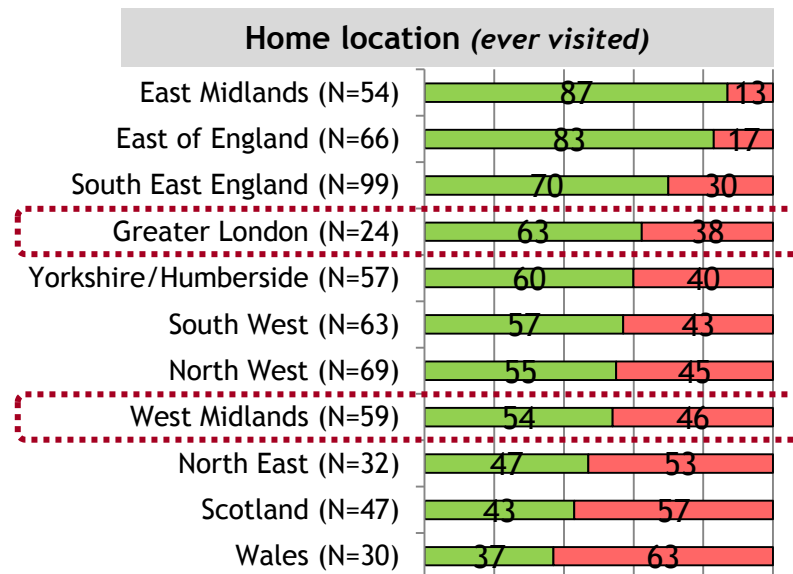
**5 x
Culture-Lover
Itineraries**

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

Considerations: Target areas

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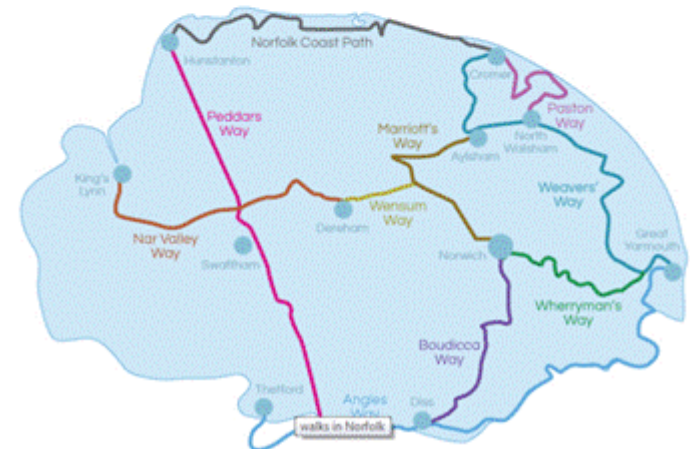
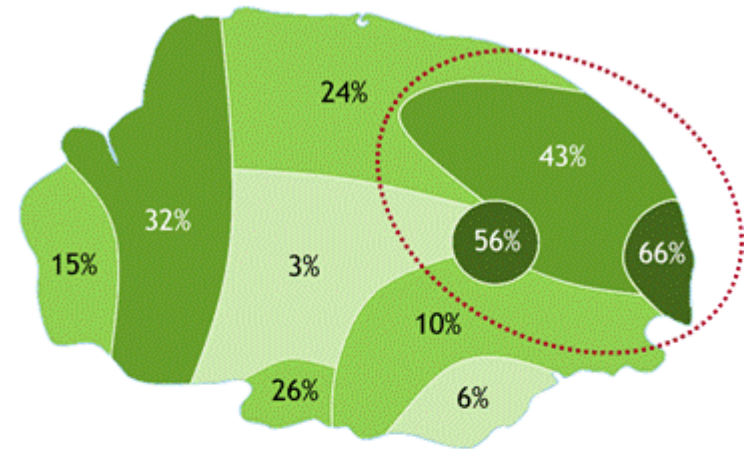
- Think also about 'accessibility', whilst the 2-hour drive time is clearly important, visitation is **perhaps lower than expected amongst people in the West Midlands and Greater London**
- With **fast road networks and direct train journeys**, these land-locked areas might be a viable targets for promotion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



Considerations: Balancing out the areas most visited

95

- ➔ Visiting is clearly ‘east heavy’
- ➔ There appears to be an opportunity to more strongly leverage Norfolk Trails, which act as a natural link between areas and can act as the basis for packages and ‘challenges’ e.g.
 - ⇒ “Walk the Norfolk Coastal Path”
 - ⇒ “Cycle the Peddars way” (with an overnight stay in Swaffham?)
 - ⇒ “Run the Marriott’s Way” (with an overnight stay in Aylsham?)
 - ⇒ “Ride the Paston Way by horseback”, or...
 - ⇒ “Walk the whole of Norfolk!”
- ➔ Consideration might also be given to co-ordinated cycle hire (or stronger promotion of existing hire options) on Norfolk Trails to increase accessibility between areas within the county



Considerations: Targeting

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- ➔ The interests of visitors and potential visitors suggest **certain types of publications might prove viable targets** for future press releases/articles



Considerations: Seasonality

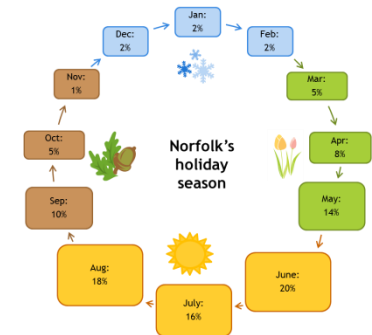
97

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

“Seal boat trip and overnight stay”



“Ice-skating/
carol singing
and a family
meal”



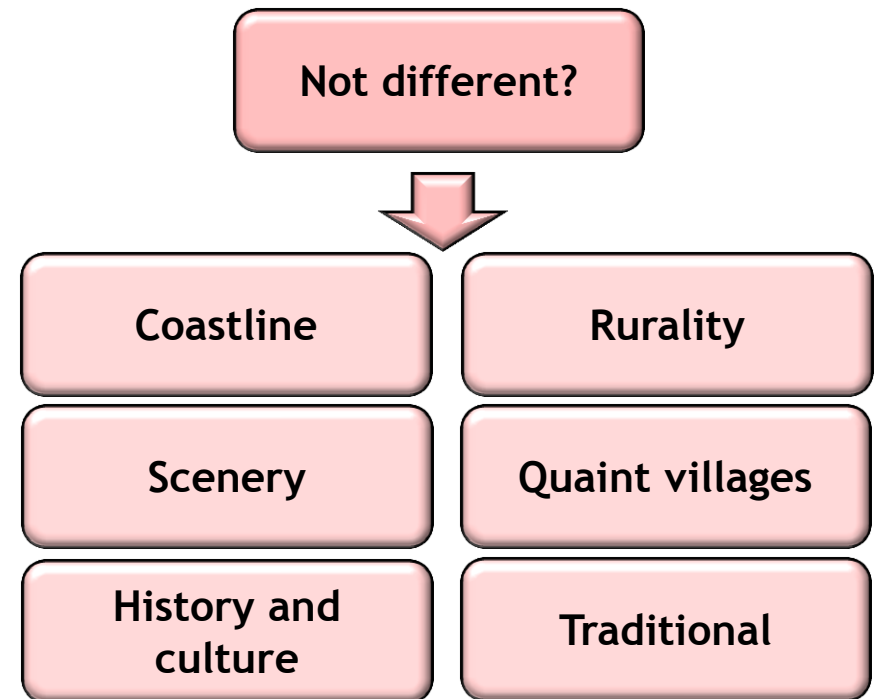
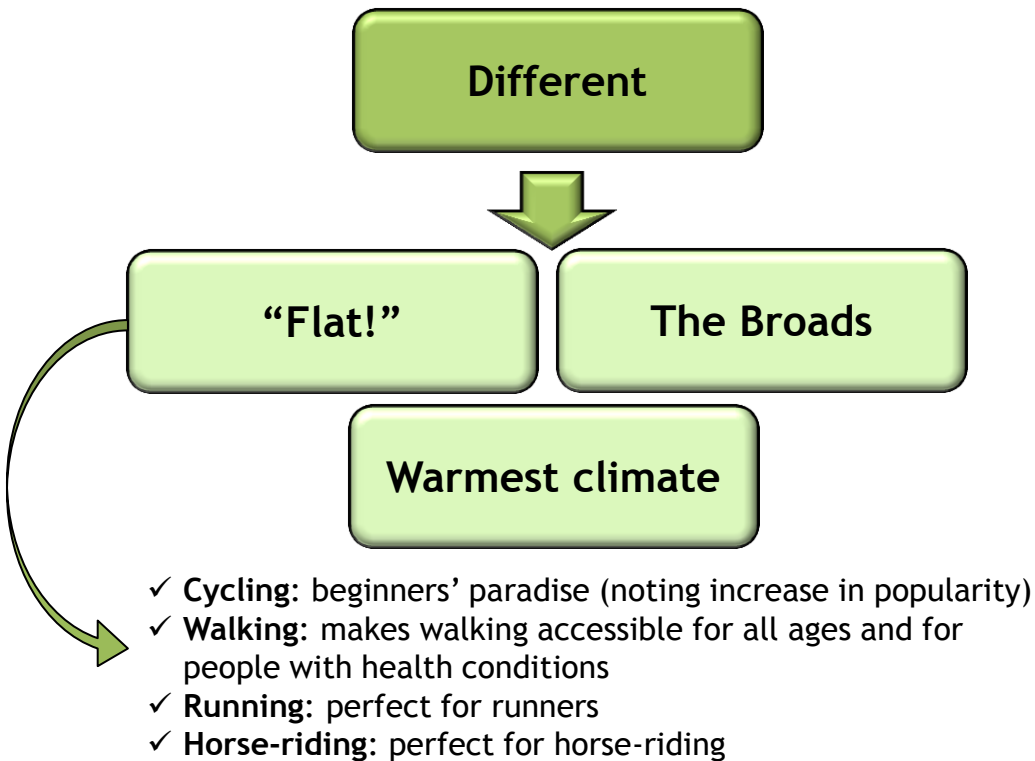
“Christmas
shopping and
theatre and/or
afternoon tea”



Consideration: Norfolk's points of differentiation

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- ➔ The research appears to suggest that, whilst Norfolk does have a great deal to offer, it is **not broadly seen as being different or offering unique experiences**
- ➔ In moving forward, it is important to be **clear about what is a 'true' point of differentiation** (or 'different to enough locations to be noteworthy') and be aware of those that are 'great to have but not different to other counties' offerings'



Considerations: Turning accessibility into a PR story 99

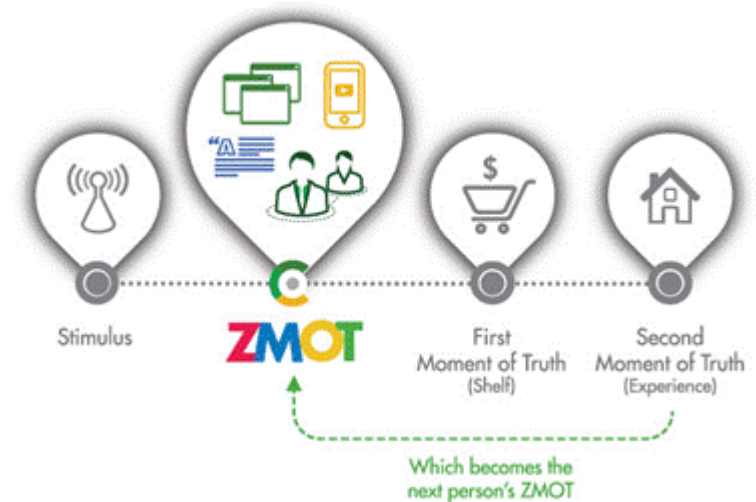
- The A11 opening is a key opportunity to **improve perceptions of accessibility** into Norfolk
- Whilst undoubtedly much is 'in the pipeline' for press releases, the research has again highlighted how important the road link will be



Considerations: Further areas

100

- Consideration might also be given to:
- Tapping into **emotional messaging/injecting personality**, such as Visit Northumberland's strapline - perhaps creating taglines/branding for the county as a whole and/or for the individual areas?
- Considering and communicating **the importance of word of mouth** and recommendation to businesses in the area - noting Norfolk's NPS on the whole is poor



And finally... Dos and don't for Norfolk businesses

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-
- ✓ **DO...** buy in to joint ventures and itineraries with other relevant/compatible attractions, accommodation, food outlets to create tailor-made itineraries for the target audience
 - ✓ **DO...** consider joint marketing campaigns with other relevant/compatible attractions, accommodation, food outlets to spread costs and make promotions affordable
 - ✓ **DO...** organise leaflet/promotional materials in a way that is easy to navigate and segment into different target audiences/offering e.g. family fun, trail guides, shopping, action & adventure
 - ✓ **DO...** consider an online presence as much as possible, and links to other relevant sites
 - ✓ **DO...** get recommended! Pay attention to your customers and encourage them to review your company online
 - ✓ **DO...** carefully consider where to target your promotions to maximise the return on investment

 - ✗ **DON'T...** assume “build it and they will come” - visitors need to know you exist!
 - ✗ **DON'T...** assume everyone knows what you offer and how great it is - “not much to do” is a key barrier to visiting different areas of Norfolk
 - ✗ **DON'T...** assume everyone has the same view of your business as you do - pay attention to Trip Advisor and other review sites, it's a key information source for visitors
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Appendix - Area Breakdown

Visitor profile

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Area	Social grade	Children	Ages	Budgets
Norwich	AB/C1	Quite likely	All ages	Wide variety
Great Yarmouth	AB/C1/C2/DE	Most likely	35+	On a budget
South Norfolk	C1/C2	Quite likely	55+	Wide variety
North Norfolk	AB/C1	Less likely	45+	Wide variety
Thetford Forest	AB/C1	Quite likely	35+	Wide variety
King's Lynn and West Norfolk	AB/C1/C2	Quite likely	45+	Wide variety
The Broads	AB/C1	Quite likely	45+	Wide variety
The Brecks	AB/C1	Least likely	55+	Wide variety
The Fens	AB/C1	Less likely	35+	Wide variety
Waveney Valley	AB	Less likely	55+	Wide variety

When and where?

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Area	When	Peak season	How long	Accommodation
All				Hotels
Norwich	May-Aug	June	Day trips and short stays	Staying with relatives
Great Yarmouth	May-Aug	Aug	Short stays	Holiday park
South Norfolk	April-Sep	June	Short trips and short stays	Holiday park
North Norfolk	May-Sep	June	Day trips and short stays	Self-catering, camping, B&B
Thetford Forest	May-Aug	June	Day trips	Self-catering, camping
King's Lynn and West Norfolk	May-Sep	June	Short stays	Self-catering
The Broads	May-Sep	June	Day trips	Holiday park, boat
The Brecks	March-July	June	Day trips	Holiday park
The Fens	May-Sep	June	Day trips	Hotels, B&B
Waveney Valley	March-Aug	June/Aug	Short stays	Holiday parks

What and where else?

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