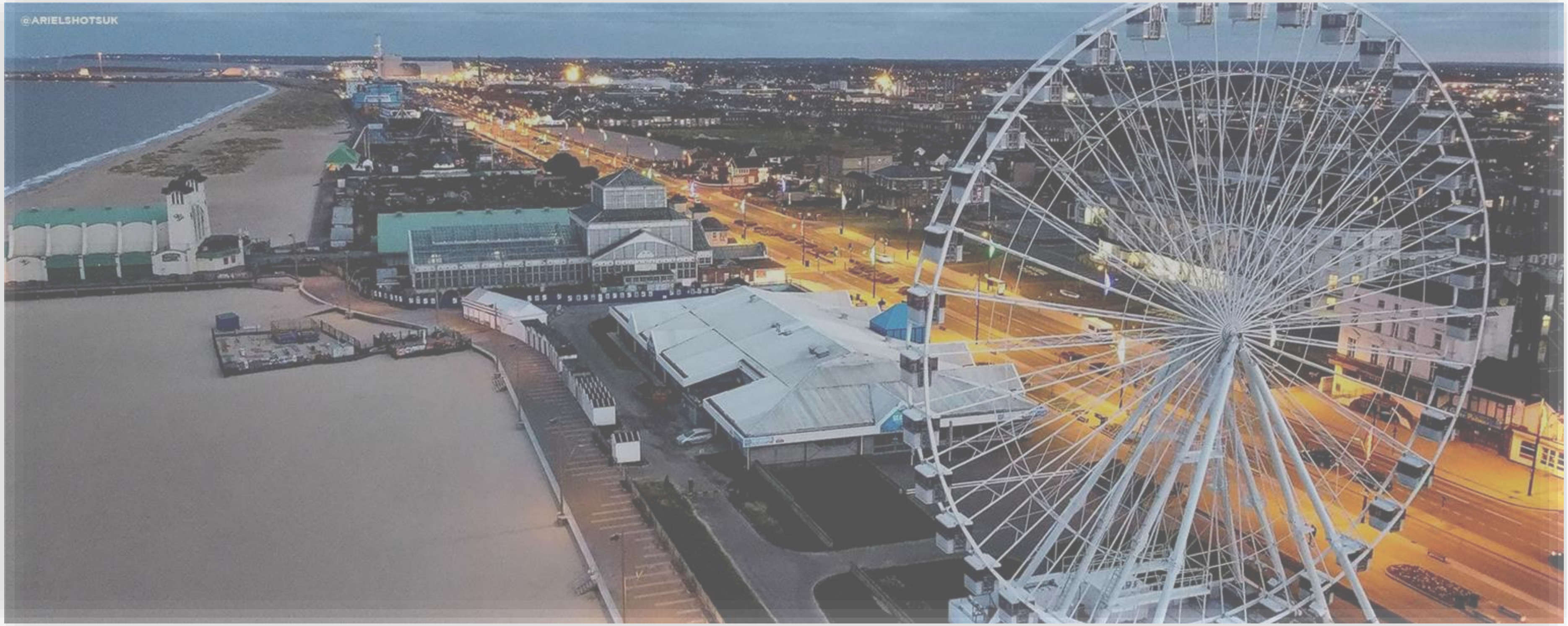
# Great Yarmouth Visitor Survey




September 2021

Prepared by:

destinationresearch
delivering results : measuring what matters

On behalf of:

VISIT GREAT YARMOUTH

**Contents**

# Introduction, Methodology and approach

Destination research was commissioned to conduct a consumer survey among visitors to the borough. The aim of the study was to produce a clear and robust understanding of the profile and characteristics of current visitors to the area, a measure of their levels of satisfaction and their marketing preferences to facilitate future targeted communications to both existing and new visitors to the area.

The overall approach involved conducting face-to-face interviews with visitors at key destinations within the borough, including Hemsby in the north, Great Yarmouth town and Gorleston-on-Sea in the southern end of the borough. We used a mix of closed (pre-determined response option) and open-ended questions, both providing prompts and seeking unprompted opinions.

**Methodology**

The seasonal variations were taken into account and interviews were conducted at different periods to monitor changing visitor behaviour and characteristics throughout the surveying period, including both school and non-school periods, weekdays and weekends with an even spread of days throughout the interviewing process.

The survey was undertaken over a three-month period starting at the end of June / early July 2021 until the end of September 2021. The survey work was completed between the hours of 11am / 12pm and 6pm. The results are based on a total sample of 450 interviews.

## Research Outputs – About the respondents

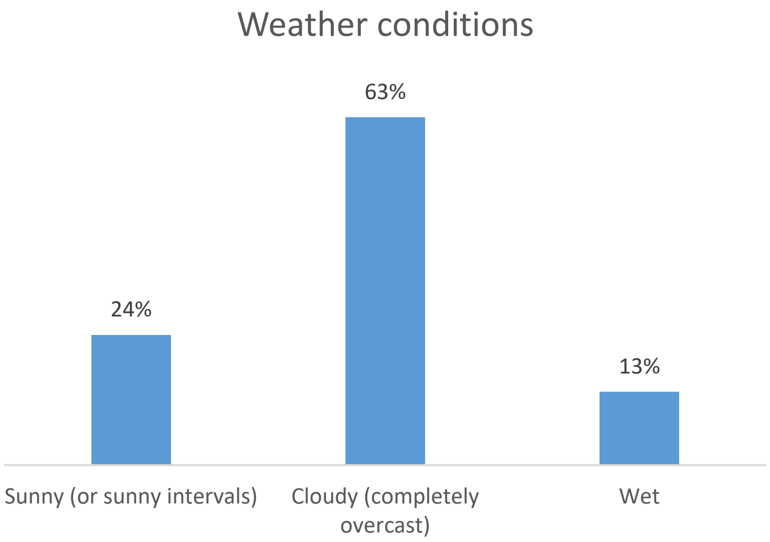
- Please indicate your age
- Please indicate your gender
- Please tell us your home location
- What is your occupation and employment status?
- Your visiting party and the type of trip

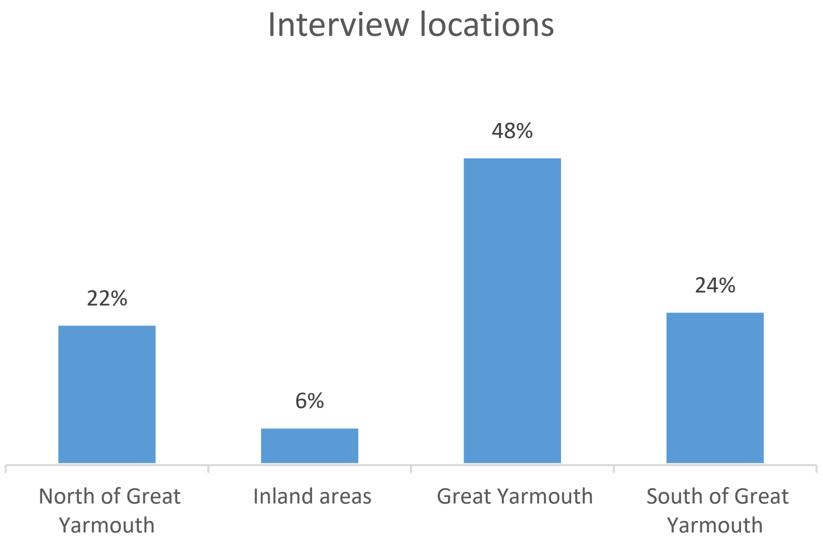
## About the respondents – Setting the scene

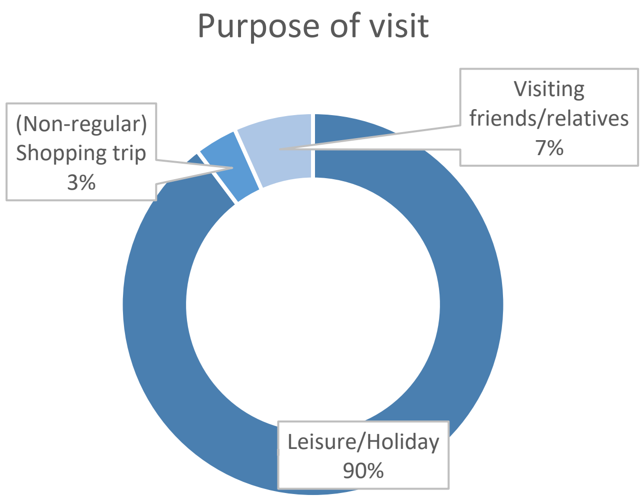
The first section of this report sets the scene in terms of who was included in the survey, where interviews took place and a summary of weather conditions. It also provides an overview of their profile in terms of place of residence, gender, age group, socio-economic status and usual visiting party structure.

Almost half of interviews (48%) were conducted in Great Yarmouth, 24% in the south of Great Yarmouth (Gorleston-on-Sea), 22% in the north of Great Yarmouth (Winterton-on-Sea, Caister-on-Sea, Newport and Hemsby). A small proportion were conducted in inland areas (Martham and Belton).

Of the total sample of interviews, 90% were visiting for leisure / holiday purposes, 7% were visiting either friends or family and 3% were on a non-regular shopping trip. The remaining 2% visited Lowestoft for other purposes.



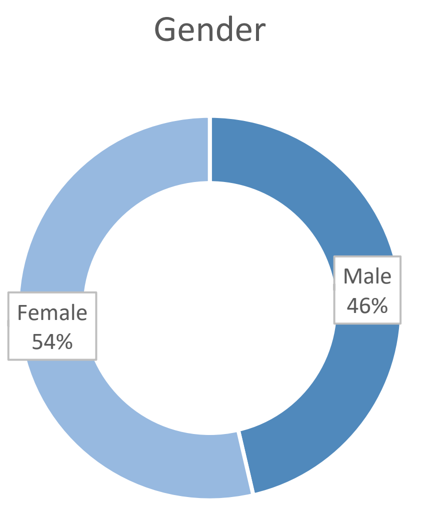



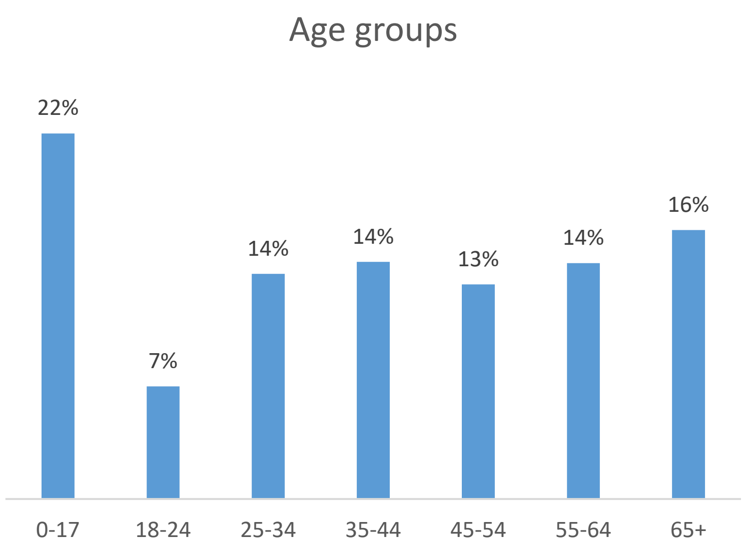



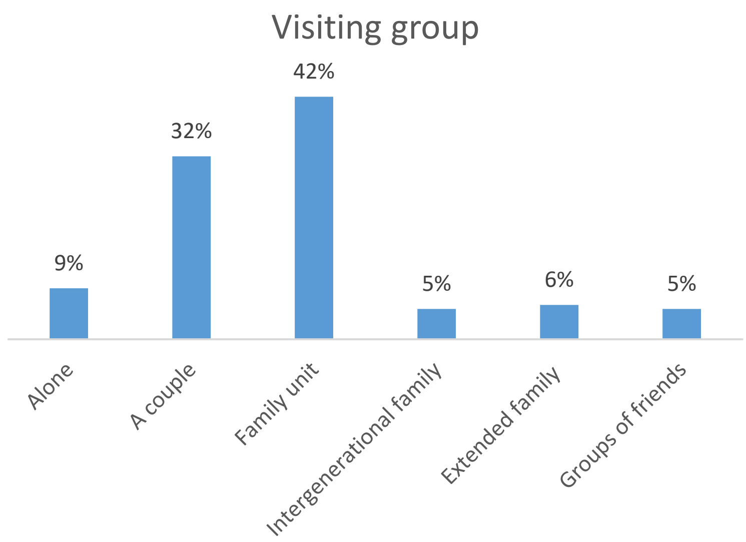

*What is your main reason for visiting?*

# About the respondents

A higher proportion of women (54%) took part in the survey. Children accounted for 22% of the sample and young adults for a further 7%. There was an even split among all adult age groups. Family units were the most usual visiting group (42%). When extended and intergenerational families were included the total increased to 53%. About a third (32%) travelled as a couple and 9% visited alone. Finally, 5% of respondents were part of a group of friends.



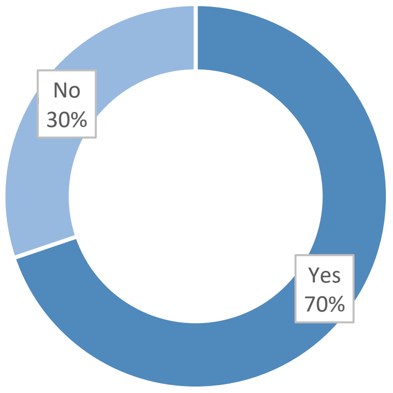

*How many people in your immediate family are male and female and which age categories do they fall into?*
*How would you describe your visiting party?*

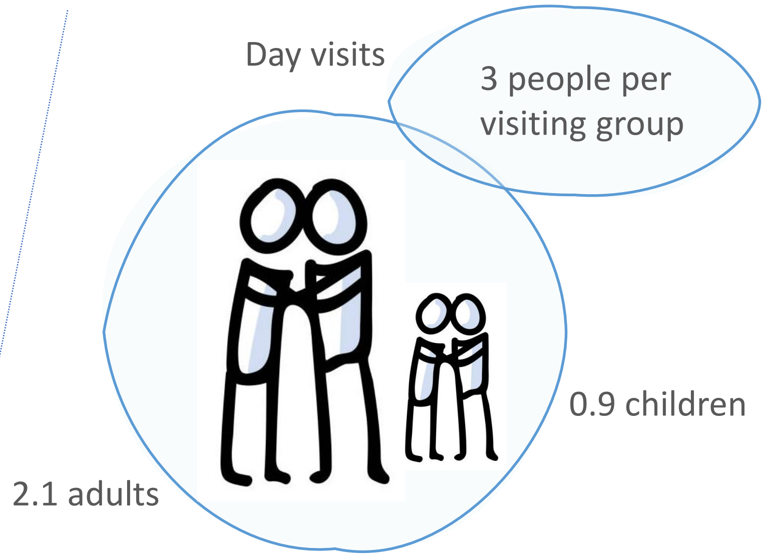
## About the respondents

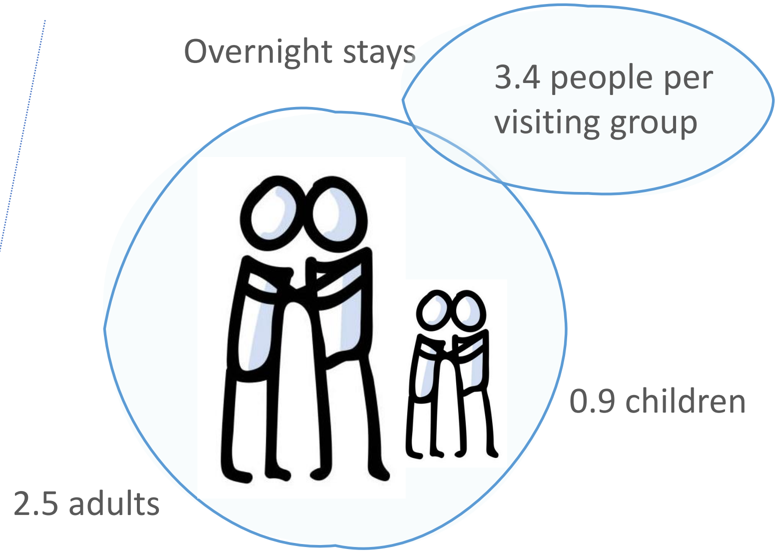
The sample included a larger proportion of visitors staying overnight in the area (70%). On average, visitors staying overnight visited in groups of 3.4 people (2.5 adults and 0.9 children).

The remaining 30% of respondents were in the area as part of a day trip. Their usual visiting group was slightly smaller at three people per visiting group (2.1 adults and 0.9 children per group).

Staying overnight in Great Yarmouth?



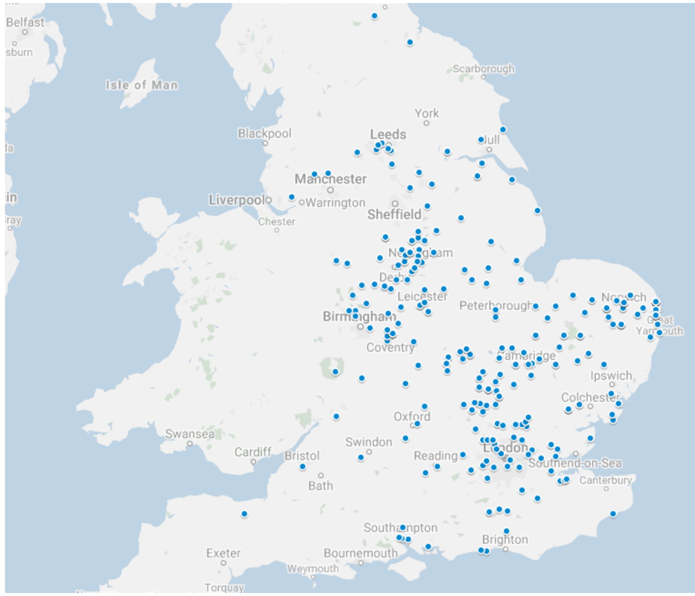




*Are you staying overnight during your trip?*
*How many people in your immediate family are male and female and which age categories do they fall into?*

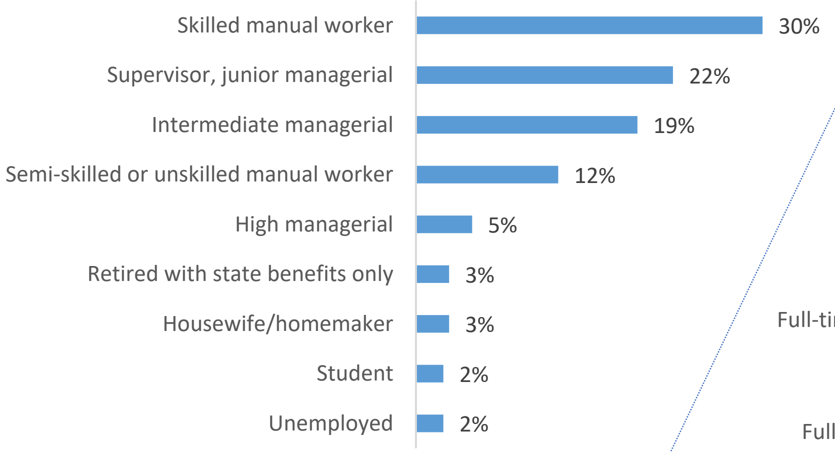
# About the respondents

Three in five respondents (61%) were in full-time employment and a further 18% were retired. In terms of the key occupations, skilled manual workers (30%), junior managerial (22%) and intermediate managerial jobs (19%) account for every seven out of ten jobs.

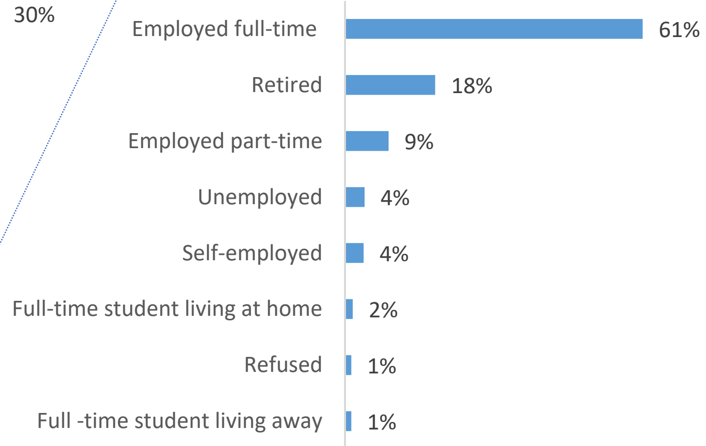
East of England, Midlands and South East regions account for 81% of all visitors. Day visitors are mainly from the East of England, particularly Norfolk and Suffolk and, to a lesser degree, Essex. Overnight visitors originate primarily from within the East of England, East Midlands and South East of England. Key areas within these regions include Essex, Nottinghamshire, Derbyshire, Kent, Bedfordshire, Cambridgeshire and Lincolnshire.




## Occupation household main income earner




## Employment status




| | ALL | Overnight Visitors | Day Visitors |
|---|---|---|---|
| East of England | 44% | 30% | 79% |
| East Midlands | 17% | 21% | 7% |
| South East | 14% | 17% | 6% |
| West Midlands | 9% | 12% | 1% |
| Yorkshire and Humber | 7% | 9% | 2% |
| North West | 3% | 4% | 0% |
| South West | 3% | 3% | 1% |
| Greater London | 1% | 2% | 1% |
| North East | 1% | 1% | 2% |
| Northern Ireland | 1% | 1% | 1% |
| Scotland | 0% | 0% | 1% |



*Which of the following categories applies to the chief income earner in your household?*
*What is the occupation of the household's main income earner? What is the first part of your postcode?*

## Research Outputs – About day and overnight trips

About day and overnight trips

- Accommodation (locations, expenditure, satisfaction ratings)
- Length of stay (number of hours /  number of nights).

## About the respondents - About day and overnight trips

The majority of overnight visitors (71%) stayed in Great Yarmouth itself. As well as Great Yarmouth town, other popular choices included Hemsby, Caister, Gorleston, Scratby, California and East Somerton within the borough and Lowestoft, Kessingland, Wroxham, Norwich and King's Lynn further away. They spent £37.39 per person per night and £190.66 per person per trip.

On average, overnight visitors spent 5.1 nights away from home. Two thirds of day visitors (67%) spent all day in the area.

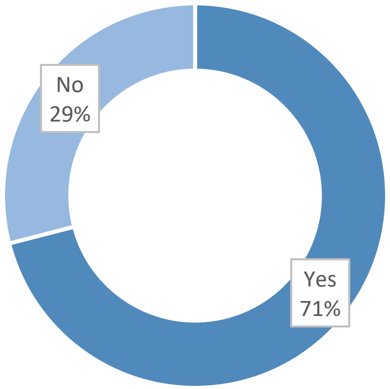
Self-catering forms of accommodation made up half of all stays in paid accommodation. Static caravans, holiday parks and chalets accounted for 31% of all accommodation used. Other rented self-catering was 12% and caravanning and camping accounted for a further 6%. Two in five used serviced accommodation including B&B guesthouses (24%) and hotels (15%).

### Spend on accommodation

£37.39 per person and night

£190.66 per person and trip

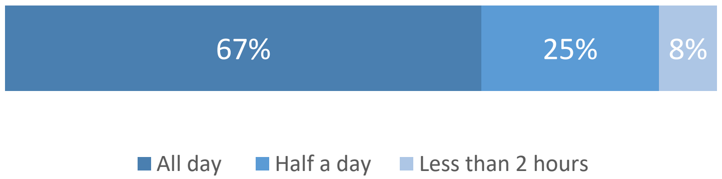
### Staying overnight in Great Yarmouth



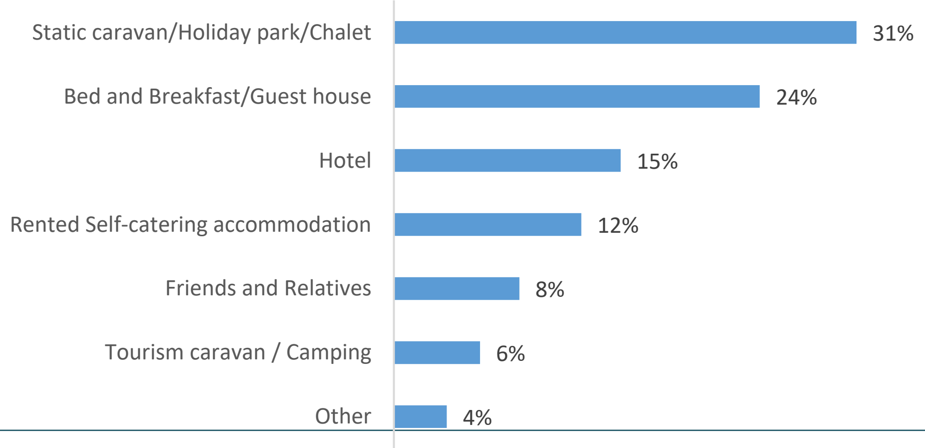

### Length of stay (nights)

5.1 nights per trip

### Length of stay (day trips)




### Type of accommodation used

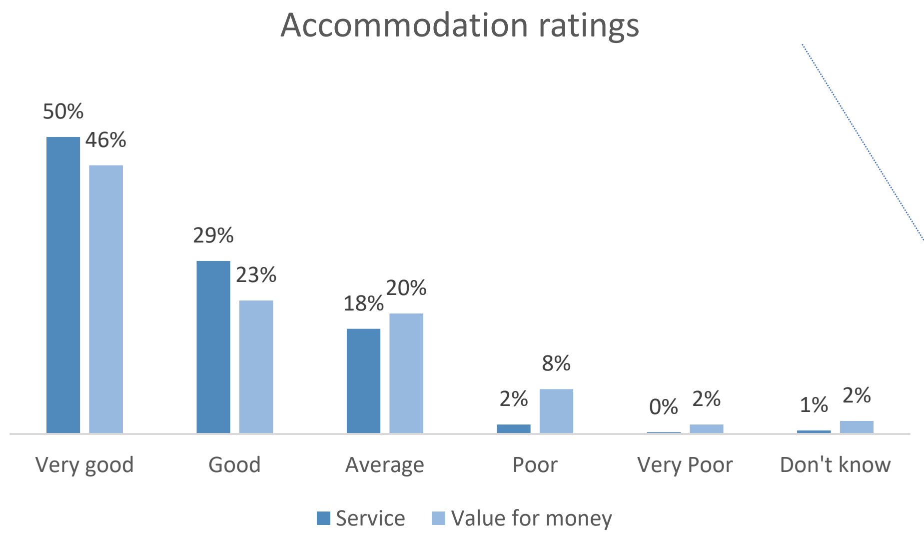


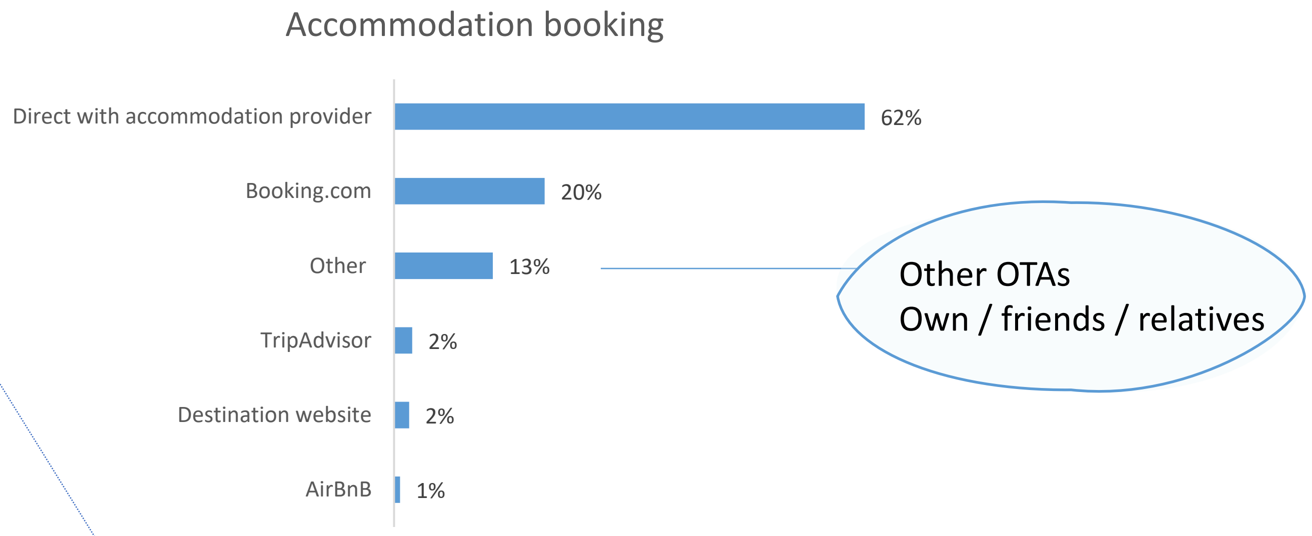

*Are you staying overnight in Great Yarmouth? Where are you staying? What type of accommodation are you staying in? How many nights are you spending away from home? How much has/will you and your party be spending on your accommodation for the duration of your stay? How long are you planning to spend here today?*

## About the respondents - About day and overnight trips

Overall, visitors rated their accommodation highly, with 79% rating the quality of service received as 'good' (29%) or 'very good' (50%). Value of money achieved slightly lower ratings. At total of 69% said value for money was 'good' (23%) or 'very good' (46%). One in five (20%) said it was 'average' and 10% rated it as 'poor' (8%) or 'very poor' (2%).

Almost two thirds (62%) book their accommodation directly with the provider. One in five used online travel agent (OTA) Booking.com and a further 13% used other methods, including other OTAs (Pitchup.com, Cottages for You, Holidays Direct) and those that stayed with friends or relatives.





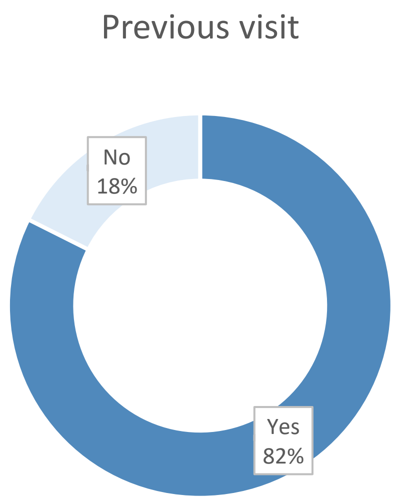

*How would you rate the quality of service provided by your accommodation establishment?*
*How would you rate your accommodation in terms of value for money?*

## Research Outputs – About recent visits

- Transport and mobility
- Activities undertaken
- Levels of expenditure during the trip

## Recent visit to Great Yarmouth – Previous visits

The vast majority of respondents had visited Great Yarmouth previously. Three in ten (29%) had visited within the last six months and a further 15% within the last year. Two in five (40%) had visited between one and five years ago (of these, 22% had previously visited one to two years ago). Those that had visited longer that five years ago, including adults that had only visited as children, accounted for 16%.

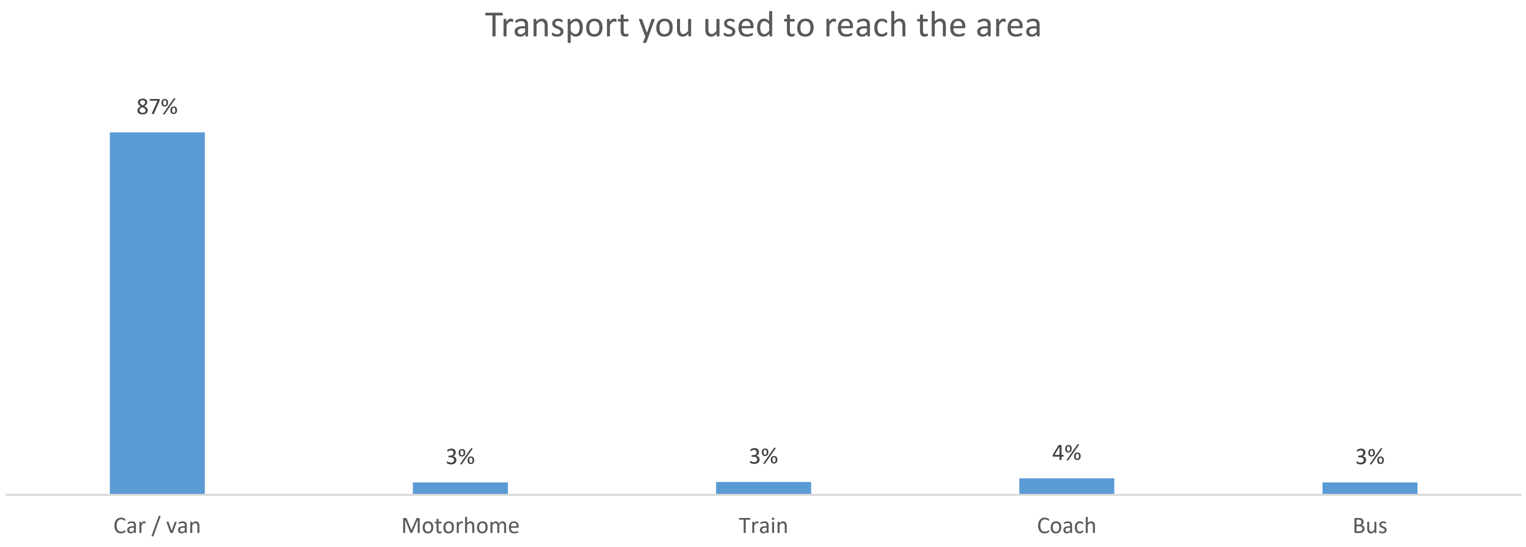




*Have you visited the area before? When did you last visit for leisure?*

# Recent visit to Great Yarmouth - Transport

A large majority of visitors travelled by car (87%). The rest of the visitors used other modes of transport, including motorhomes, train, coach and public bus services.




*What was the main form of transport you used to reach Great Yarmouth?*

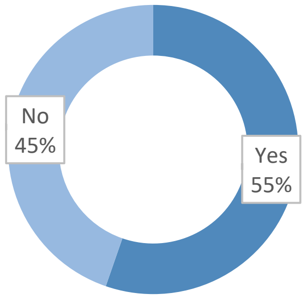
# Recent visit to Great Yarmouth – Car parking

Just over half of car users made use of the public parking areas.

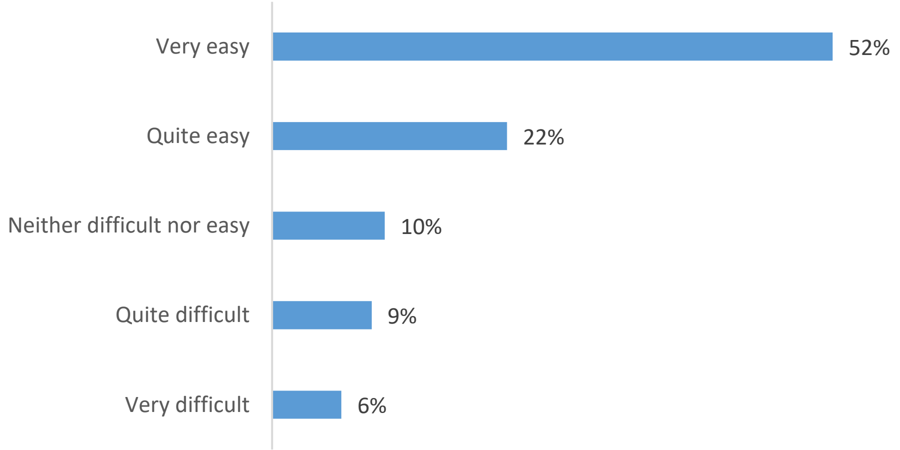
Three quarters found public car parks ‘easy’ (22%) or ‘very easy’ (52%) to find. On the other hand, 15% found it ‘difficult’ (9%) or ‘very difficult’ (6%).

Almost half considered the cost of parking to be ‘quite’ (25%) or ‘very’ (20%) expensive. Almost two in five (37%) thought it was ‘about average’. Conversely, 13% said it was ‘reasonable’ and 5% found it ‘very reasonable’.

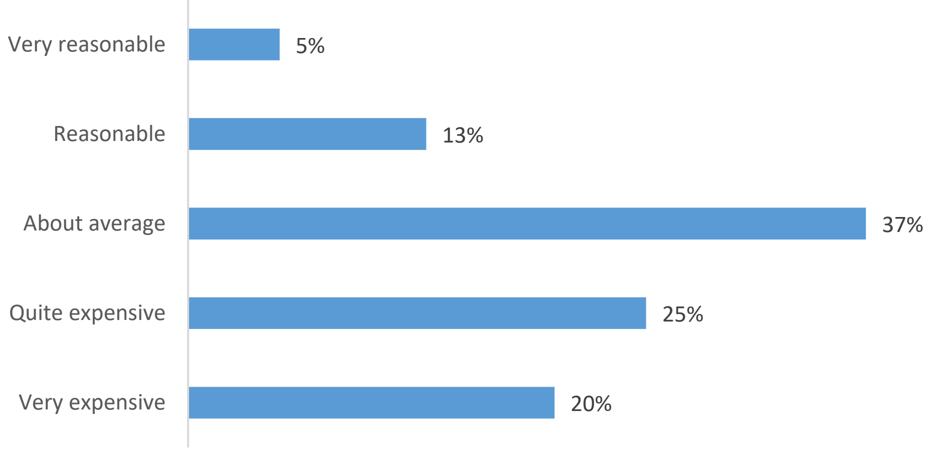
Used any of the public car parks?




Easy of finding public car parks




Cost of parking in Great Yarmouth




*Have you used any of the public car parks during your stay? How easy did you find it to park?*
*How would you rate the cost of parking in Great Yarmouth?*

# Recent visit to Great Yarmouth – Key activities undertaken

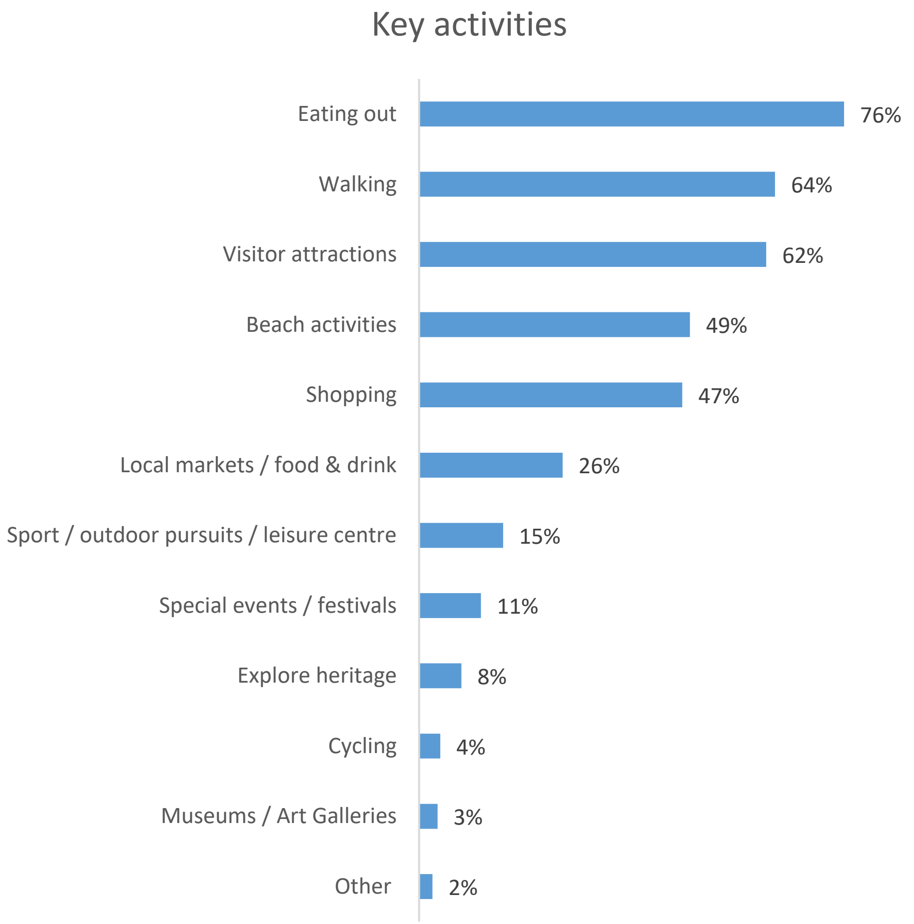
Eating out, walking and going to visitor attractions were the top three activities that respondents engaged in during their visits to the area.

Three quarters of respondents (75%) said they ate out. As you would expect, this proportion was greater among staying visitors.

Almost two thirds (64%) took the opportunity to go for a leisure walk and a similar proportion (62%) went to one of the local visitor attractions.

Half of respondents (49%) took part in beach activities and an almost equal number (47%) went shopping.

Smaller proportions of respondents took part in other activities, including visits to local markets (26%), outdoor activities (15%) and cycling (4%), attending special events (11%) and visiting heritage sites (8%), museums and art galleries (3%).




*Which of the following activities do you hope to enjoy during your trip? (multiple answers allowed)*

# Recent visit to Great Yarmouth – Trip expenditure

The average overall expenditure among staying visitors to Great Yarmouth (per person, per 24 hours) on accommodation, eating out, shopping, entertainment and travel and transport was £46.24. Accommodation and shopping accounted for the highest proportion of the expenditure.

The average overnight visit lasted 5.1 nights, meaning that the average expenditure per person and per overnight trip was £235.37.

Day visitors from home spent an average of around £30.74 per person per day in the area, with eating out accounting for the highest proportion of expenditure.

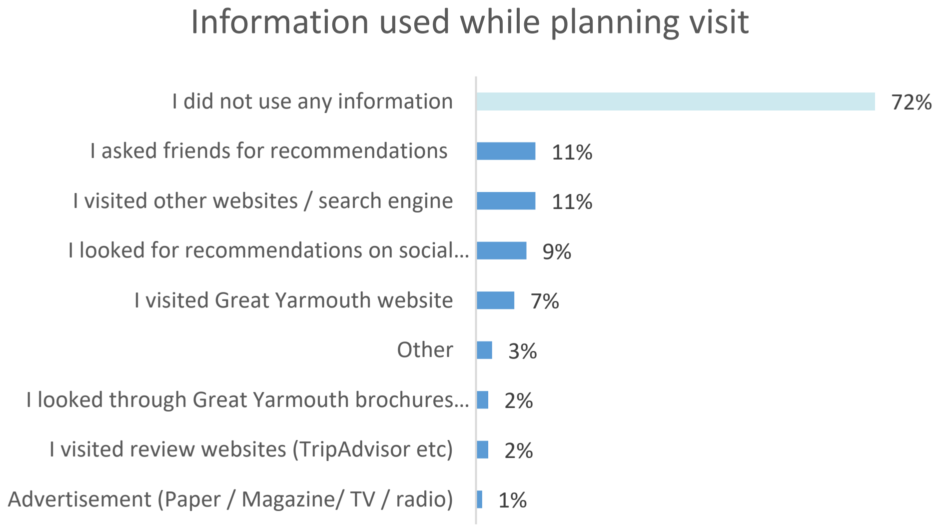
| Spend per person | Overnight Trip | Day trip |
|---|---|---|
| Accommodation | £16.20 | |
| Food and drink | £7.64 | £11.89 |
| Shopping | £13.20 | £7.17 |
| Entertainment | £4.60 | £6.49 |
| Transport | £4.60 | £5.18 |
| | **£46.24** | |
| Nights x trip | 5.1 | |
| **Total** | **£235.37** | **£30.74** |

*Thinking about today as a whole, how much do you expect that you AND your immediate party will have spent today and this evening in total in Great Yarmouth on the following (Food and drink, shopping, entertainment, transport).*

# Recent visit to Great Yarmouth – Information

Respondents were asked if they had used any information sources to find out about Great Yarmouth whilst planning their trip and if so, which types. Almost three quarters (72%) of them indicated that they didn't seek any information before deciding to visit the area, 11% based their visit on recommendations from friends and relatives, a further 11% used search engines and other websites, 9% had looked through recommendations on social media and 7% visited the Great Yarmouth website.

Day trippers used the least amount of information. In contrast, higher proportions of overnight visitors 'visited other websites / search engine' (13%), I asked friends for recommendations (13%), looked for recommendations on social media (12%) and 'visited Great Yarmouth website ' (10%)



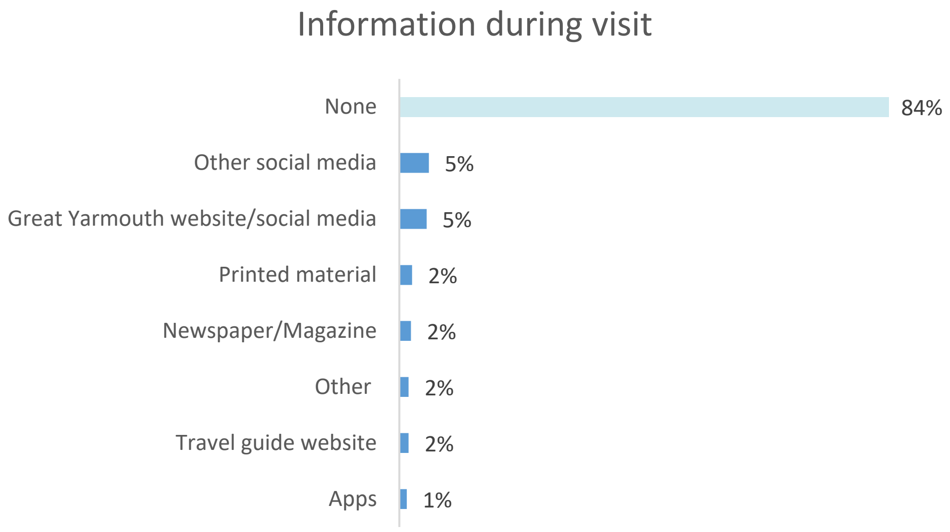

| Information used while planning visit | Overnight Trip | Day trip |
|---|---|---|
| I did not use any information | 65% | 87% |
| **I visited other websites / search engine** | **13%** | 4% |
| **I asked friends for recommendations** | **13%** | 4% |
| **I looked for recommendations on social media** | **12%** | 2% |
| **I visited Great Yarmouth website** | **10%** | 2% |
| Other | 4% | 2% |
| I visited review websites (TripAdvisor etc) | 3% | 1% |
| I looked through Great Yarmouth brochures / leaflets | 3% | 1% |

*Thinking about how you planned this trip, which of the following applies to you? (multiple answers allowed)*

## Recent visit to Great Yarmouth – Information

Respondents were also asked to specify the main sources of information they had used during their stay. Most (84%) didn't make use of any information. Those who did cited the internet and social media (including Visit Great Yarmouth).

Again, the results of the survey show that those who stayed overnight in Great Yarmouth made a slightly greater use of information during their stay (19% in total), compared to only 7% of day trippers). In particular, overnight visitors used third party social media (7%) and Great Yarmouth website/social media (5%).




| Information during visit | Overnight Trip | Day trip |
|---|---|---|
| None | 81% | 93% |
| **Other social media** | **7%** | 3% |
| **Great Yarmouth website/social media** | **5%** | 2% |
| Printed material | 3% | 2% |
| Newspaper/Magazine | 3% | 1% |
| Travel guide website | 2% | 1% |
| Other | 1% | - |
| Apps | 1% | - |

*Did you use any other type of information during your visit? (multiple answers allowed)*

## Research Outputs – About satisfaction and destination development

- Satisfaction – various aspects of visit
- Overall enjoyment
- Likelihood of recommending
- Best and worst things about the area
- About new attractions or infrastructures

# Satisfaction – Key attributes

Respondents were asked to express their satisfaction levels with a wide range of factors / indicators that together comprises the 'visitor experience'. Each factor or indicator was rated in terms of the level of visit satisfaction by using a scale of one to five, where 1='very poor' (or the most negative response), 2='poor', 3='average', 4= 'good' and 5='very good' (or the most positive response), allowing an average opinion 'score' (out of a maximum of five) to be calculated for each aspect measured.

The highest satisfaction scores were related to the quality of the beach experience and the ease of finding their way round (4.73 and 4.71 respectively), as well as the cleanliness of the beach and coastline (4.69 each). Overall impressions (feeling of welcome and general atmosphere) also achieved high scores (4.51 each).

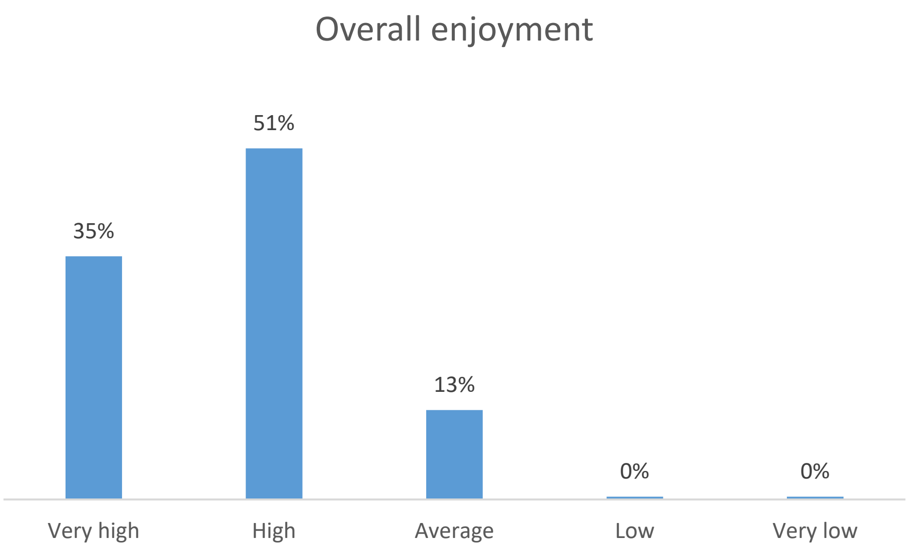
The lowest scoring indicators related to the availability of shops (3.71). Accessibility (3.75) and public toilets in terms of cleanliness and availability were also in the lower part of the table (3.80 and 3.86 respectively).

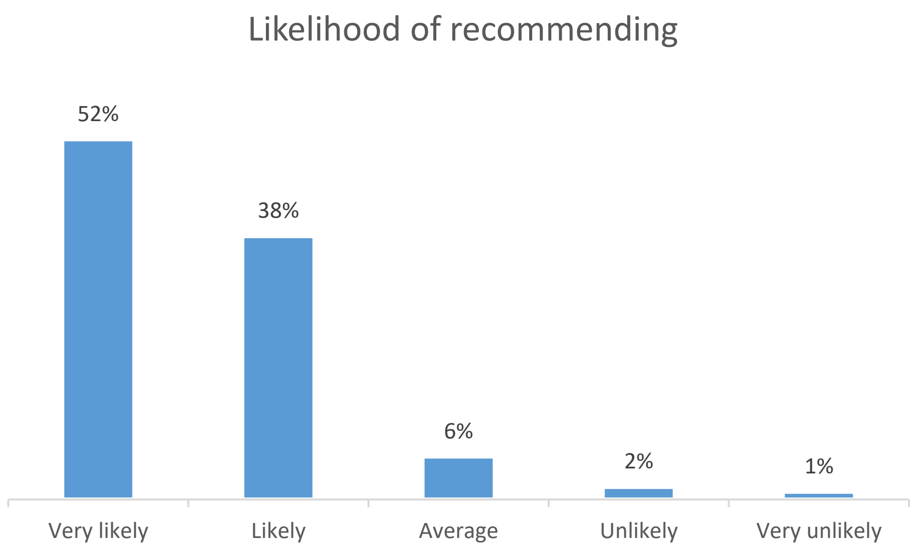
| Attributes | Very poor | Poor | Average | Good | Very good | SCORE |
|---|---|---|---|---|---|---|
| Quality of beach experience | 0% | 0% | 4% | 16% | 79% | 4.73 |
| Ease of finding your way around | 0% | 0% | 5% | 19% | 76% | 4.71 |
| Beach/Coastline Cleanliness | 0% | 1% | 5% | 17% | 77% | 4.69 |
| Watersports/outdoor recreation (e.g. cycling) | 0% | 2% | 11% | 19% | 68% | 4.53 |
| Overall impression (feeling of welcome) | 0% | 0% | 9% | 30% | 61% | 4.51 |
| Overall impression (general atmosphere) | 0% | 1% | 8% | 31% | 60% | 4.51 |
| Maps and Information Boards | 1% | 3% | 10% | 20% | 66% | 4.47 |
| Attractions | 0% | 1% | 10% | 31% | 58% | 4.44 |
| Places to eat and drink | 1% | 3% | 10% | 25% | 61% | 4.44 |
| Pedestrian signposting | 0% | 2% | 21% | 26% | 51% | 4.25 |
| History & Heritage | 2% | 2% | 17% | 28% | 51% | 4.24 |
| Arts/Culture | 2% | 5% | 21% | 28% | 44% | 4.06 |
| Prams/buggies access | 6% | 6% | 14% | 24% | 49% | 4.03 |
| Traffic levels/congestion | 1% | 7% | 25% | 25% | 42% | 4.00 |
| Public toilets in terms of availability | 8% | 6% | 19% | 25% | 42% | 3.86 |
| Public toilets in terms of cleanliness | 6% | 10% | 21% | 24% | 39% | 3.80 |
| Disabled accessibility | 5% | 13% | 20% | 25% | 37% | 3.75 |
| Shops | 2% | 9% | 33% | 27% | 28% | 3.71 |

*Please rate your satisfaction level on the following aspects of your visit. - 1 is very poor and 5 is very good*

# Satisfaction – Overall enjoyment and recommendations

Satisfaction scores were very positive with most visitors rating highly their overall enjoyment (35% said their levels of enjoyment were 'very high' and 51% rated them as 'high'). As a result, nine out of ten (90%) said they were 'likely' (38%) or 'very likely' (52%) to recommend Great Yarmouth to friends and relatives as a tourist destination.




*How would you rate the overall enjoyment of your visit to Great Yarmouth?*
*How likely are you to recommend Great Yarmouth to someone else?*

## Great Yarmouth area - Best things about the area

The best things about Great Yarmouth have been grouped by themes. The 'beach' theme received the highest number of mentions. This was followed by the 'attractions', 'atmosphere' and 'activities' themes. Smaller numbers of respondents made reference to accessibility and places to eat, drink and shop.

Flat
Good for walking
Dog walking

The beach / coastline
Sea air
Seaside / seaside

Attractions
Amusement Parks
Arcades
Circus
Pleasure Beach
Bingo

Restaurants
Shops
Fish & chips

Great atmosphere
Relaxing
Friendly people
Nostalgia
Memories

Range of activities
Plenty for children to do
Variety of things to do
Children / family friendly

*What would you say is the BEST thing about Great Yarmouth?*

## Great Yarmouth area - Worst things about the area

The worst things about Great Yarmouth have also been grouped by themes. Note that there were half as many comments about worst things compared to the previous question about 'best thing about the area'. 'Car parking' issues received the highest number of mentions. This was followed by 'overcrowded', 'empty outlets', 'busy' 'run down' and 'costs'.

Busy

Overcrowded

Car parks (charges and availability)

Run down (except seafront)

Empty shops

Litter / poor cleanliness

Lack of (dog) bins

Accommodation costs

Limited variety places eat and drink

Too many fish and chips outlets



*What would you say is the WORST thing about Great Yarmouth?*

## Great Yarmouth area - New attraction or infrastructure

When asked about the potential development of new attractions or infrastructure, 30% of respondents gave answers and two main themes emerged from these answers – ‘shopping’ and a new leisure / swimming centre. A third theme (mentioned slightly less frequently than these two themes) relates to ‘public facilities’, particularly car parking / contactless payments and public toilets. The final theme makes reference to ‘culture and heritage facilities’.

More (clothes) shops /new shopping centre

More eateries / new café

Leisure centre

Indoor swimming / splash pool

Car parks (contactless payment)

New / revamp public toilets

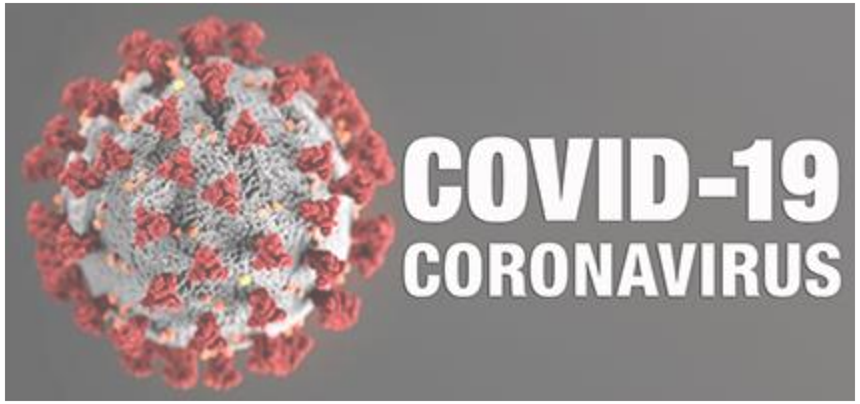
Museum / heritage

Winter gardens

*Is there a new attraction or new infrastructure that you would like to be developed in the area? What would you like this to be?*

## Research Outputs – About the COVID-19 pandemic

- Has COVID-19 impacted negatively on your chances of taking more holidays or days out than usual?
- What is your current opinion on the pandemic?



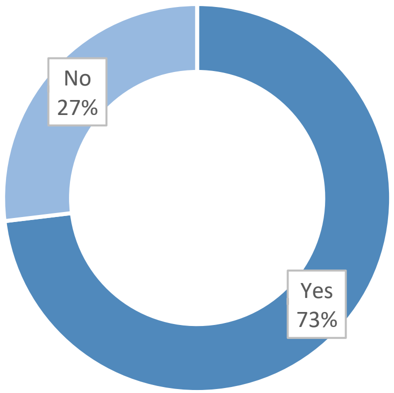
## New attraction or infrastructure

Almost three quarters of respondents said that COVID-19 impacted negatively on their chances of taking more holidays or days out than usual.

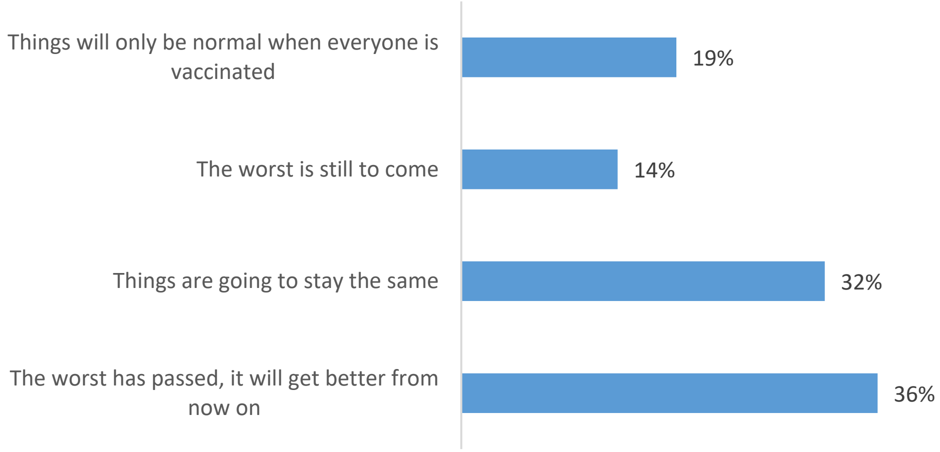
Looking ahead, just over a third (36%) believe that the worst of the pandemic has passed and it will get better from now on. A further 32% think things are going to stay the same as they were at the time of the interview.

Unfortunately, 14% still believe the worst is yet to come, and 19% expect things will only be normal when everyone is vaccinated.

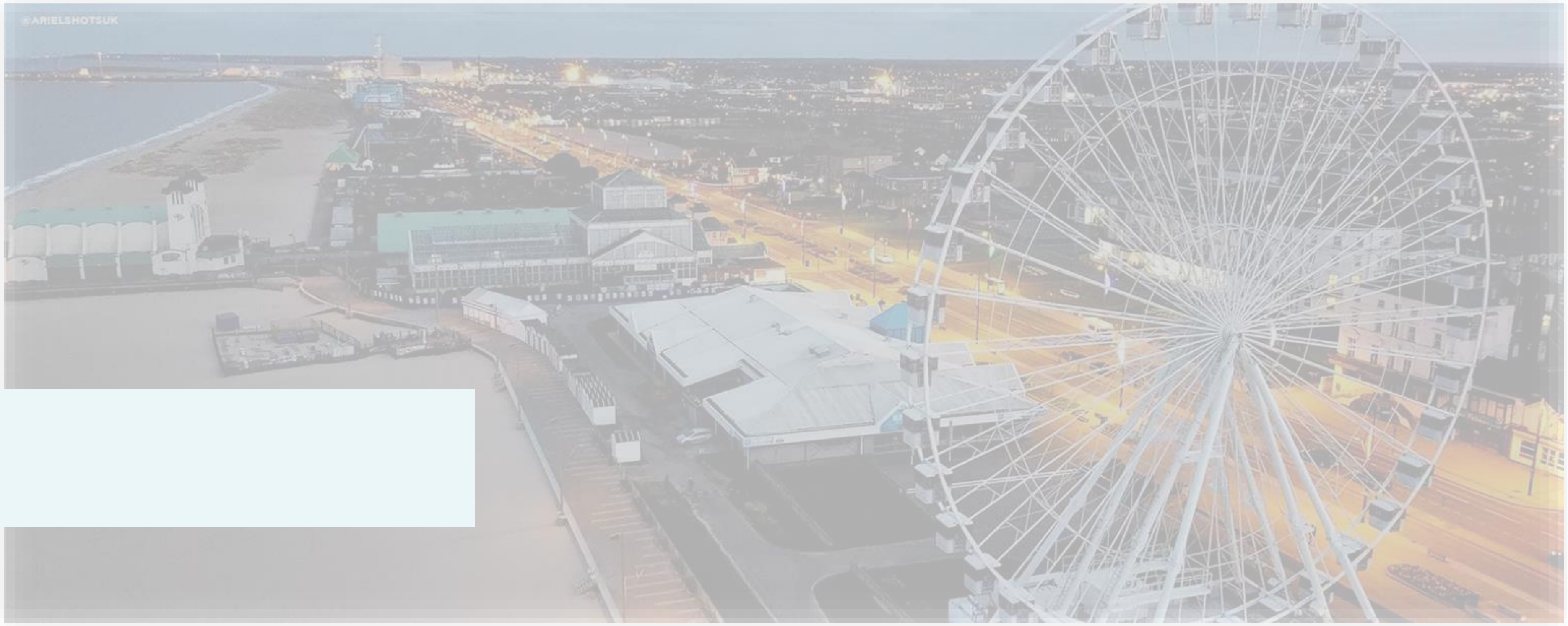
Has COVID-19 impacted negatively on your chances of taking more holidays or days out than usual?




What is your current opinion on the pandemic?



## Research Outputs – Key take outs




- Key take outs

## About the respondents

- The results are based on a total sample of 450 interviews.
- A higher proportion of women (54%) took part in the survey.
- Family groups were the most usual visiting parties.
- Most visits (90%) were for leisure / holiday purposes and 70% of visitors were staying overnight in the area.
- East of England, Midlands and South East regions account for 81% of all visitors.

## About day and overnight trips

- The majority of overnight visitors (71%) stayed in Great Yarmouth itself.
- On average, overnight visitors spent 5.1 nights away from home.
- Self-catering forms of accommodation made up half (49%) of all stays in paid accommodation. Two in five (39%) used serviced accommodation.
- Two thirds of day visitors (67%) spent all day in the area.
- Overall, 79% visitors rated their accommodation as ‘good’ (29%) or ‘very good’ (50%). And 69% said value for money was ‘good’ (23%) or ‘very good’ (46%).
- Almost two thirds (62%) book their accommodation directly with the provider.

## About recent visits

- The vast majority of respondents (82%) had visited Great Yarmouth previously. More than two in five (44%) had visited within the last year.
- A large majority of visitors travelled by car (87%). On the subject of e-scooter, 70% felt it will have a negative impact for the destination.
- Just over half of car users made use of the public parking areas. Three quarters (74%) found them easy to find and 45% found hem to be expensive.
- Eating out, walking and going to visitor attractions were the top three activities that respondents engaged in during their visits to the area.
- Average expenditure among staying visitors was £46.24 per day and £235.37 per overnight trip. Day visitors spent an average of £30.74 per person and trip.
- Recommendations, search engines, websites (including Visit Great Yarmouth) and social media were popular sources of information

## About satisfaction and destination development

- The highest satisfaction scores were related to the quality of the beach experience, the ease of finding their way round and the cleanliness of the beach.
- The lowest scoring indicators related to the availability of shops , accessibility and public toilets in terms of cleanliness and availability.
- Satisfaction scores were very positive with most visitors (86%) rating highly their overall enjoyment. As a result, 90% said they would recommend it to others.
- The best things about Great Yarmouth were grouped by themes and include the 'beach' theme, followed by 'attractions', 'atmosphere' and 'activities' themes.
- The worst things about Great Yarmouth related to 'car parking' issues followed by 'overcrowded', 'empty outlets', 'busy' 'run down' and 'costs'.
- A potential development of new attractions or infrastructure generated opinions relating to 'shopping' and a new leisure / swimming centre.

## About the COVID-19 pandemic

- Almost three quarters of respondents said that COVID-19 impacted negatively on their chances of taking more holidays or days out than usual.
- Looking ahead, just over a third (36%) believe that the worst of the pandemic has passed and it will get better from now on.
- A further 32% think things are going to stay the same as they were at the time of the interview.
- Unfortunately, 14% still believe the worst is yet to come, and 19% expect things will only be normal when everyone is vaccinated.


**Produced by:**

Main contact:

Asa Morrison
Great Yarmouth Tourism & Business Improvement Area / Visit Great Yarmouth

asa@gyta.com
www.gyta.com

Research & methodology contact:

Sergi Jarques
Director
Destination Research Ltd

info@destinationresearch.co.uk
www.destinationresearch.co.uk