Great Yarmouth Visitor Survey

October 2022

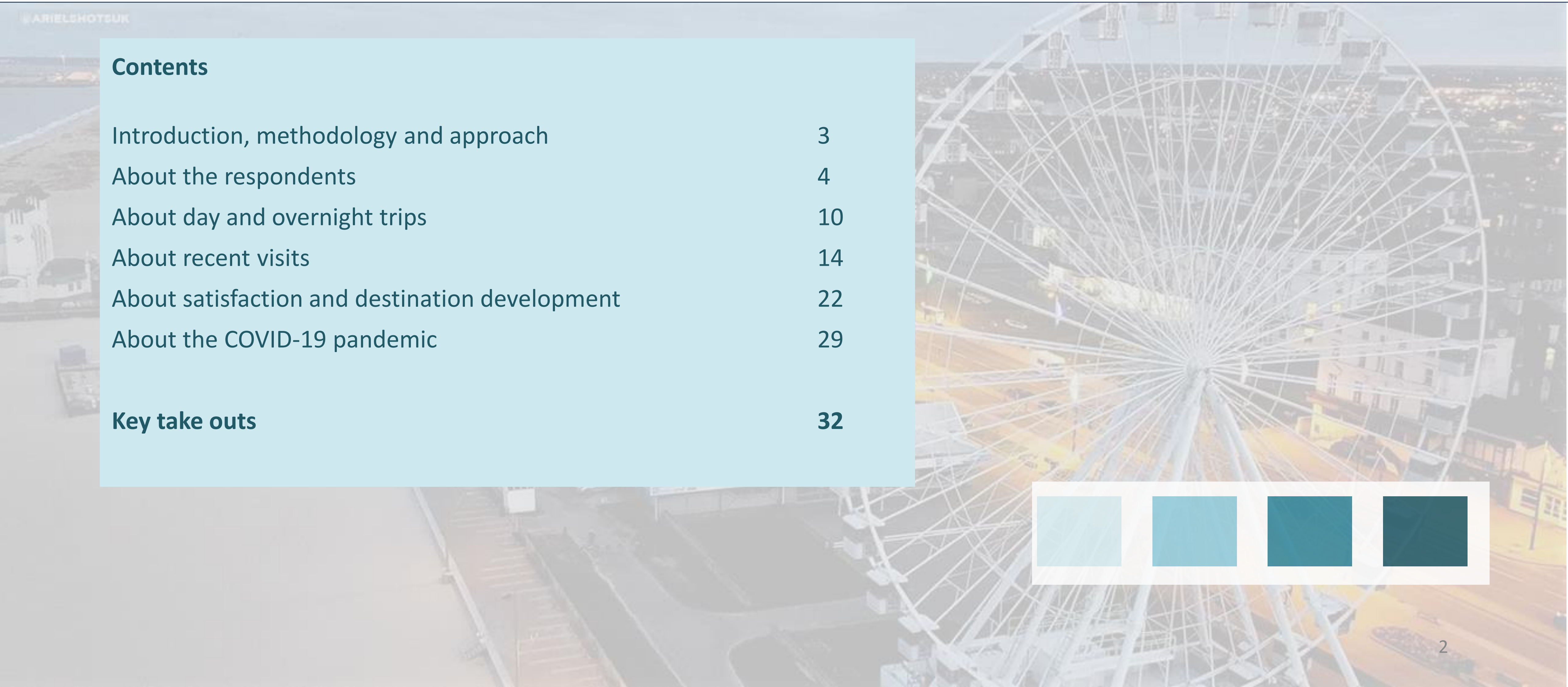
Prepared by:

destinationresearch
delivering results : measuring what matters

On behalf of:

Greater Yarmouth Tourism & Business Improvement Area

VISIT GREAT YARMOUTH



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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. Whenever possible, we have compared the results against the 2021 survey.

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 2022 until the end of September 2022. 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

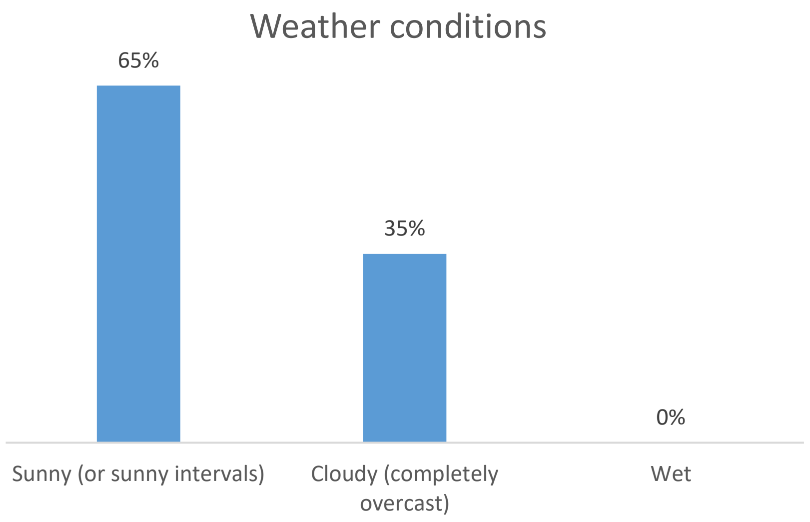
- Please indicate your age
- Please indicate your gender
- Please tell us your home location
- What is your occupation and employment status?
- Your visiting party and the type of trip

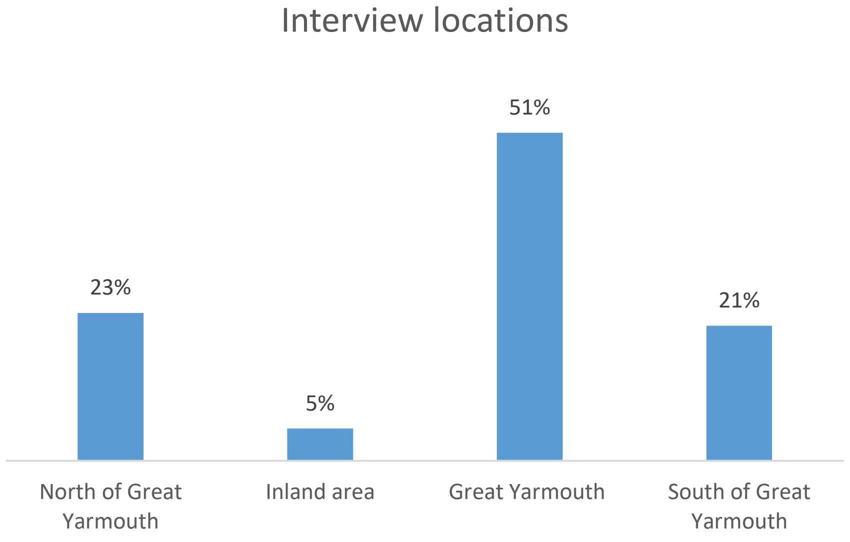
About the respondents – Setting the scene

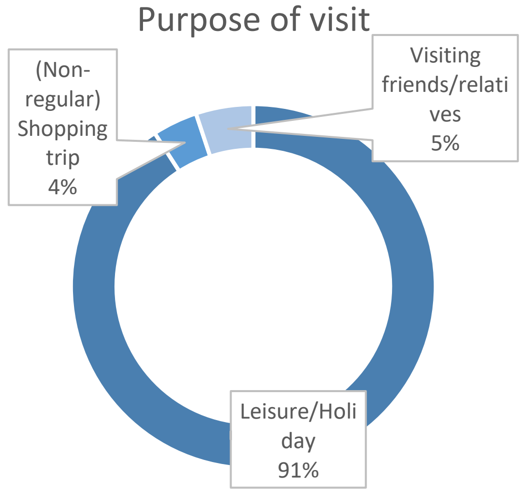
The first section of this report sets the scene in terms of who was included in the survey, where interviews took place and a summary of weather conditions. It also provides an overview of their profile in terms of place of residence, gender, age group, socio-economic status and usual visiting party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

The majority of interviews (51%) were conducted in Great Yarmouth (Promenade between Pleasure Beach and Waterways, Regent Road), 21% in the south of Great Yarmouth (Potters Resort, Gorleston on Sea - north end of the beach), 23% in the north of Great Yarmouth (Winterton-on-Sea, Caister-on-Sea, Newport and Hemsby) and 5% were conducted in inland areas (Martham and Belton).

Of the total sample of interviews, 91% were visiting for leisure / holiday purposes, 5% were visiting either friends or family and 4% were on a non-regular shopping trip.



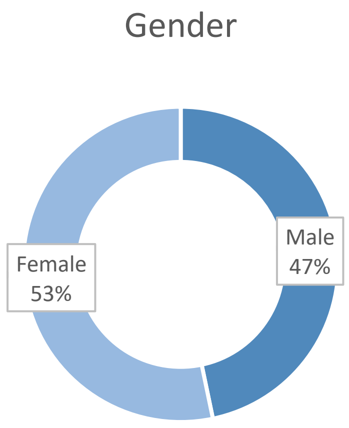


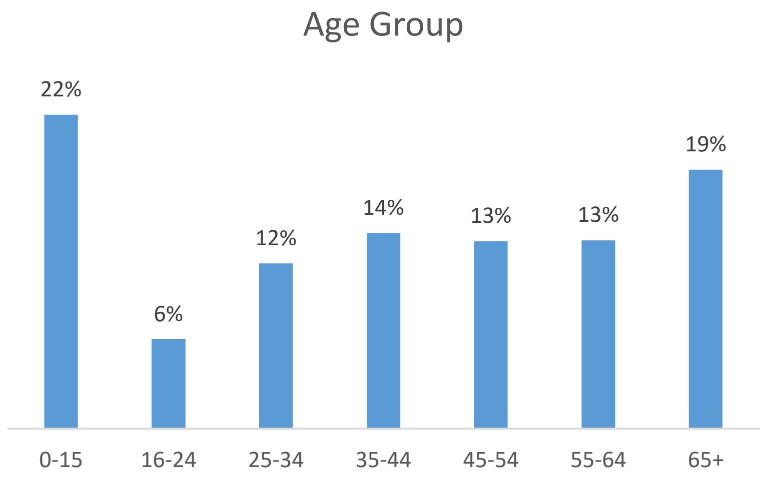


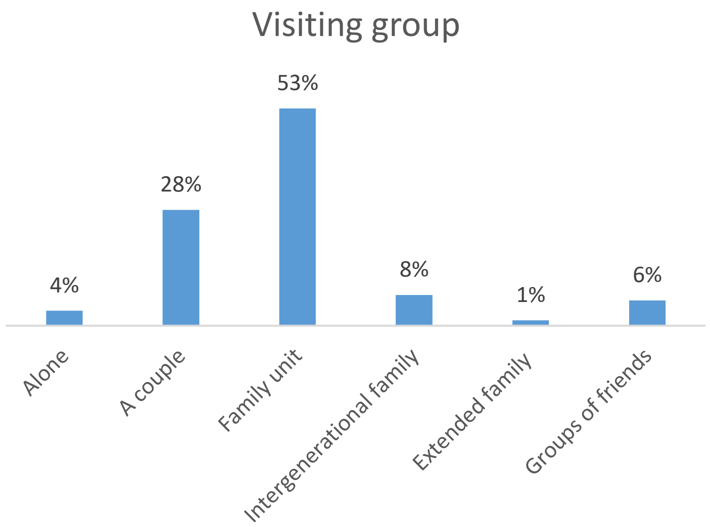
What is your main reason for visiting?

About the respondents

A higher proportion of women (53%) took part in the survey. Children accounted for 22% of the sample and young adults for a further 6%. There was an even split among all adult age groups. Family units were the most usual visiting group (53%). When extended and intergenerational families were included the total increased to 61%. Just under a third (28%) travelled as a couple and 4% visited alone. Finally, 6% of respondents were part of a group of friends.





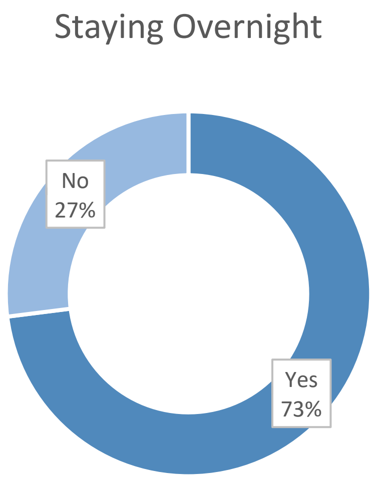


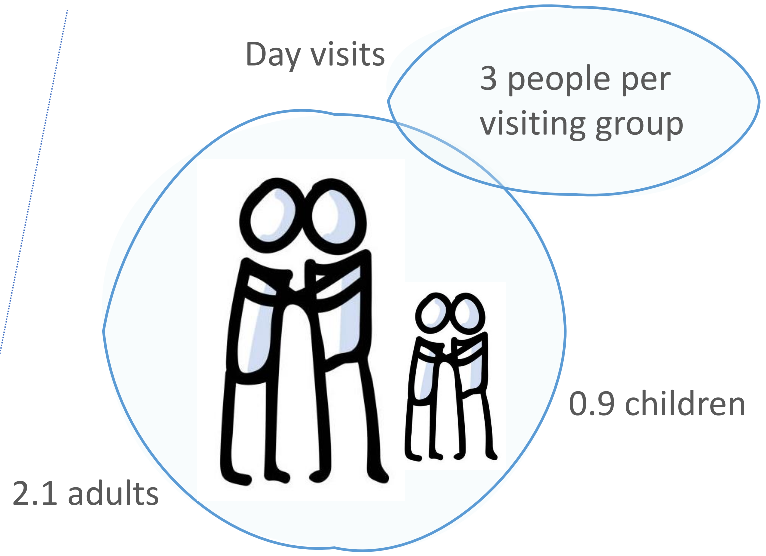
How many people in your immediate family are male and female and which age categories do they fall into?
How would you describe your visiting party?

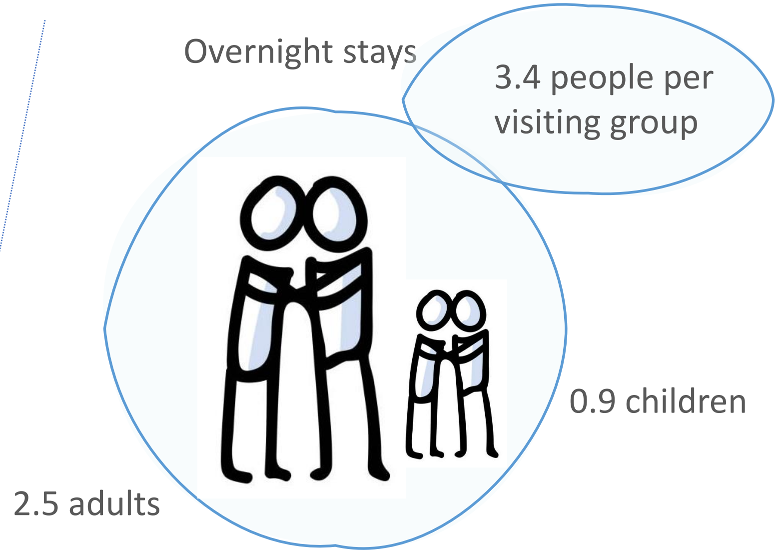
About the respondents

The sample included a larger proportion of visitors staying overnight in the area (73%) this is slightly higher than 2021 when just 70% were on an overnight visit. On average, visitors staying overnight visited in groups of 3.4 people (2.5 adults and 0.9 children).

The remaining 27% 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). The visiting group figures per group size, adults and children remained the same for both day visits and overnight stays for 2022 from 2021 results.



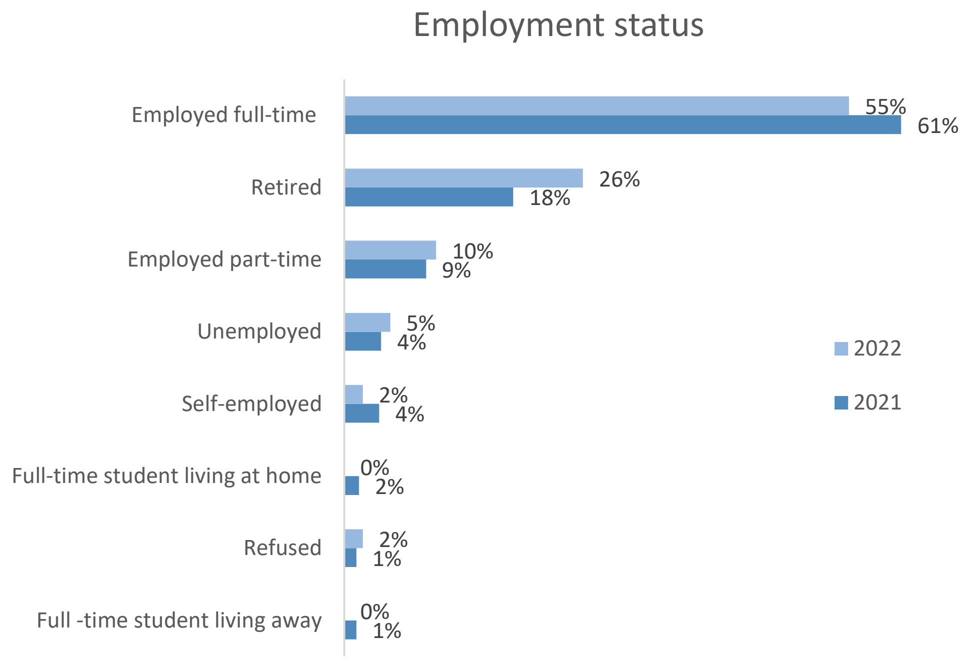


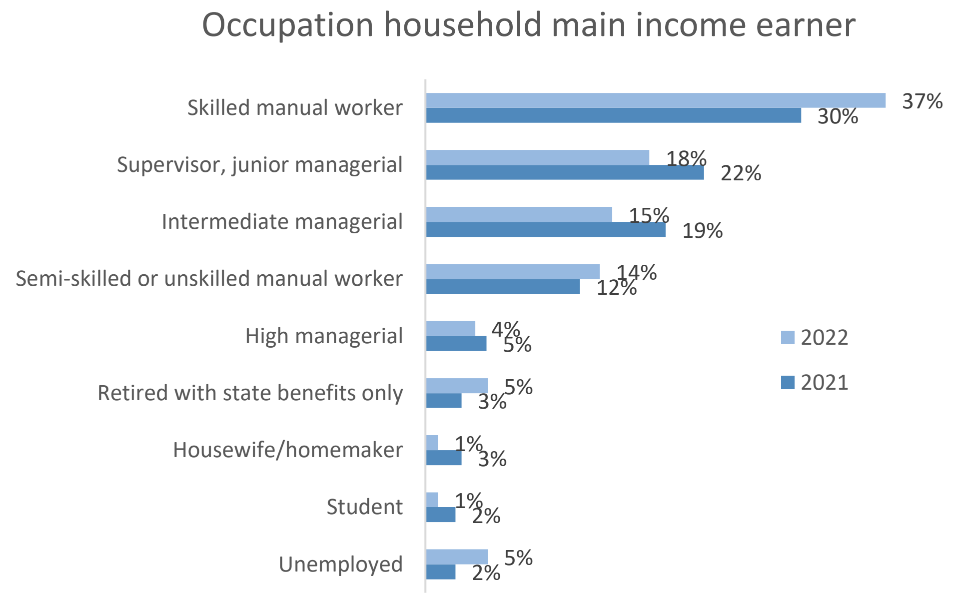


Are you staying overnight during your trip?
How many people in your immediate family are male and female and which age categories do they fall into?

About the respondents

Just over half (55%) were in full-time employment (down from 61% in 2021) and a further 26% were retired (up from 18% in 2021). In terms of the key occupations, skilled manual workers (37%), junior managerial (18%) and intermediate managerial jobs (15%) account for every seven out of ten jobs - a figure that has stayed constant to last year.





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?

About the respondents

East of England, East and West Midlands regions account for 74% 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 West Midlands. Key areas within these regions include Essex, Nottinghamshire, Derbyshire, Kent, Bedfordshire, Cambridgeshire and Lincolnshire.

2021

	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%

2022

	ALL	Overnight Visitors	Day Visitors
East of England	50%	37%	87%
East Midlands	15%	18%	7%
South East	7%	9%	2%
West Midlands	9%	13%	0%
Yorkshire and Humber	6%	9%	2%
North West	3%	5%	1%
South West	1%	1%	0%
Greater London	5%	6%	1%
North East	1%	1%	0%
Northern Ireland	1%	1%	0%
Scotland	0%	0%	0%

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 (86%) 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 £36.64 per person per night and £207.70 per person per trip.

On average, overnight visitors spent 6.1 nights away from home – an increase of a full day from 2021. Two thirds of day visitors (76%) spent all day in the area – again an increase of 9% over 2021.

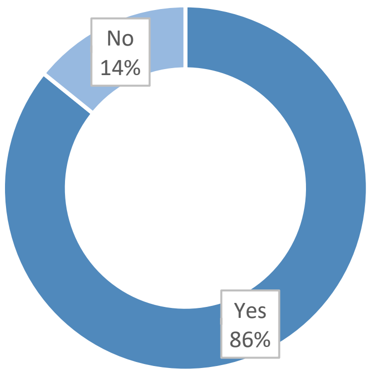
Self-catering forms of accommodation made almost 70% of all stays in paid accommodation, a significant increase on 2021. Static caravans, holiday parks and chalets accounted for 46% of all accommodation used a rise of 15% over 2021. Other rented self-catering was down to 5% and caravanning and camping was up from 6% to 15%. Two in five used serviced accommodation including B&B guesthouses (11%) and hotels (18%).

Spend on accommodation

2021 £37.39 per person and night
2022 £36.64 per person and night

2021 £190.66 per person and trip
2022 £207.70 per person and trip

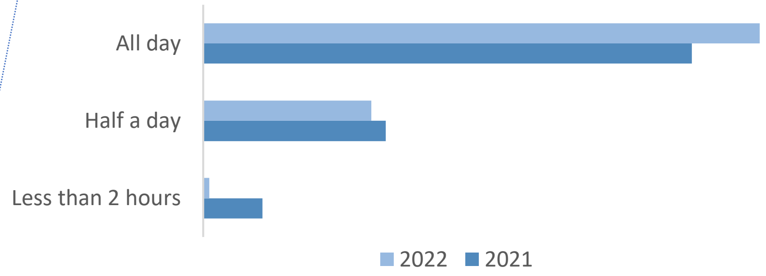
Staying overnight in Great Yarmouth



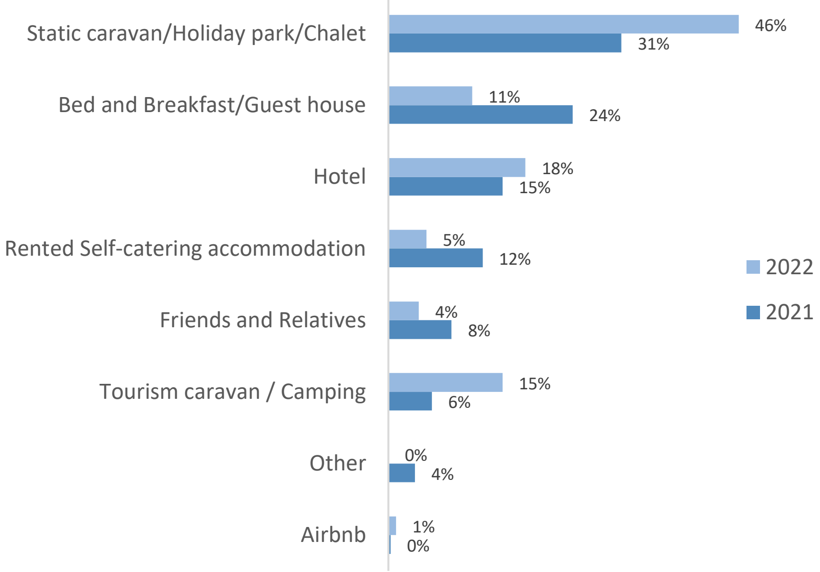
Length of stay (nights)

2021 - 5.1 nights per trip
2022 – 6.1 nights per trip

Length of stay (day trips)



Type of accommodation used



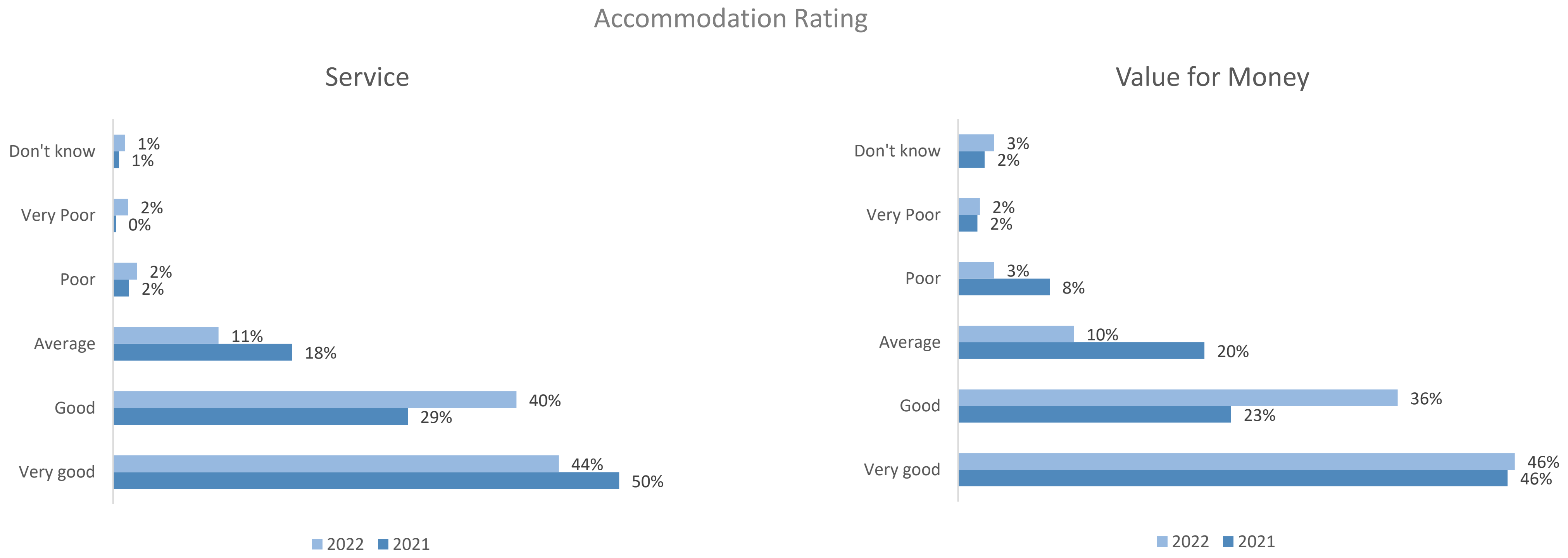
GREATER Yarmouth TOURISM & BUSINESS IMPROVEMENT AREA

VISIT GREAT YARMOUTH

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

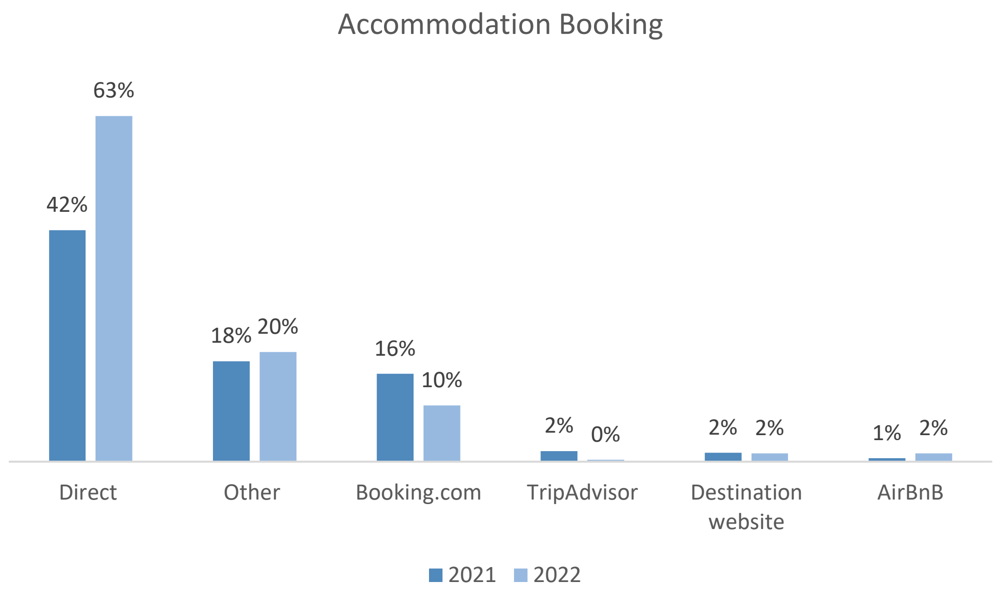
Overall, visitors rated their accommodation highly, and more rated the quality good or very good than 2021 up from 79% to 84%, although those that rated 'very good' was down from 50% to 44%. Value for money achieved very similar ratings up from 69% in 2021 to 82% in 2022. while the 'very good' rating remained similar between 2021 and 2022 the 'good' rating rose from 23% to 36%.



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?

About the respondents - About day and overnight trips

The percentage who booked their holiday directly with their accommodation provider. Almost two thirds (63%) book their accommodation directly with the provider. 16% used online travel agent (OTA) Booking.com and a further 20% used other methods, including other OTAs (Pitchup.com, Cottages for You, Holidays Direct), coach trips and large operator (Hoseasons) and those that stayed with friends or relatives.

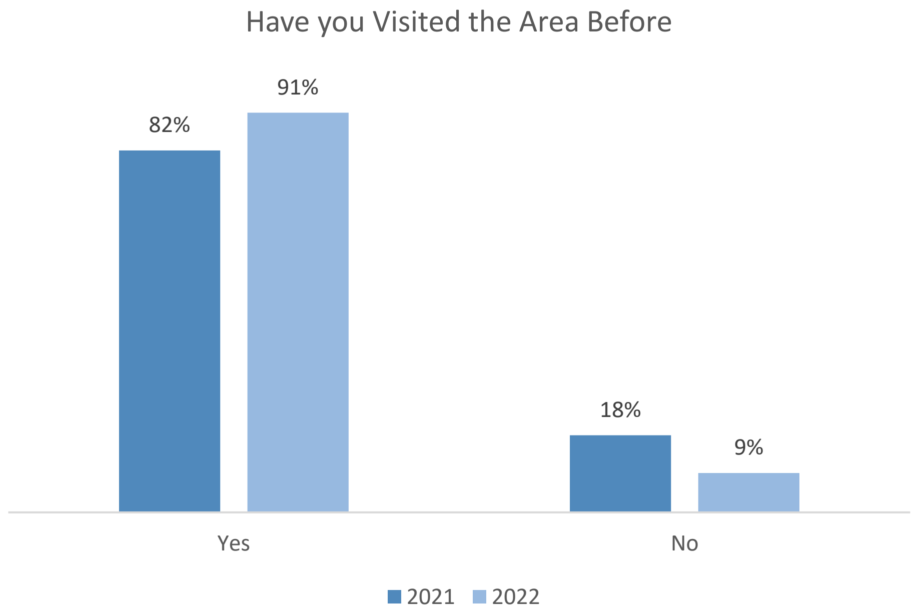


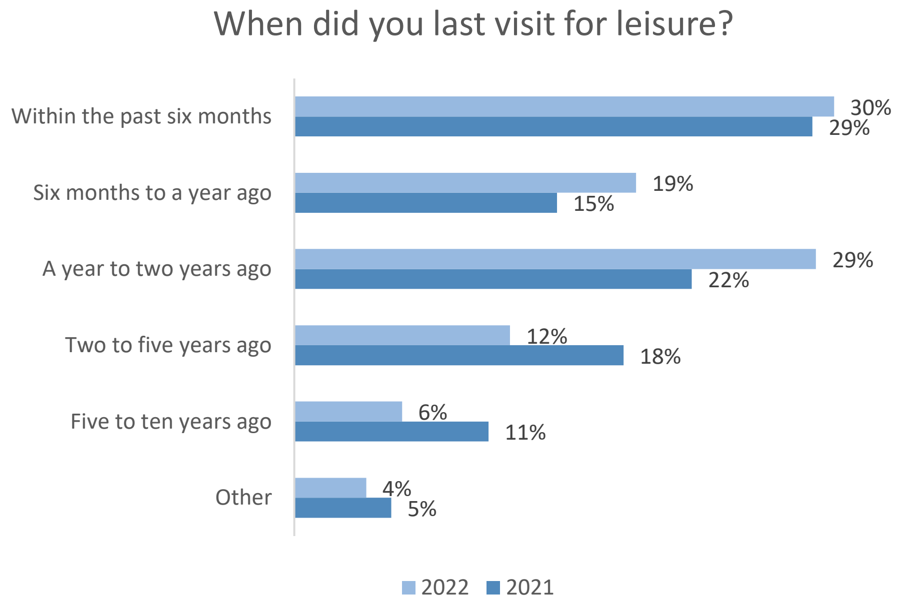
Research Outputs – About recent visits

- 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 and this rose even higher in 2022. Three in ten (30%) had visited within the last six months and a further 19% within the last year. Two in five (41%) had visited between one and five years ago (of these, 29% had previously visited one to two years ago). Those that had visited longer that five years ago accounted for only 10% down from 16% in 2022.

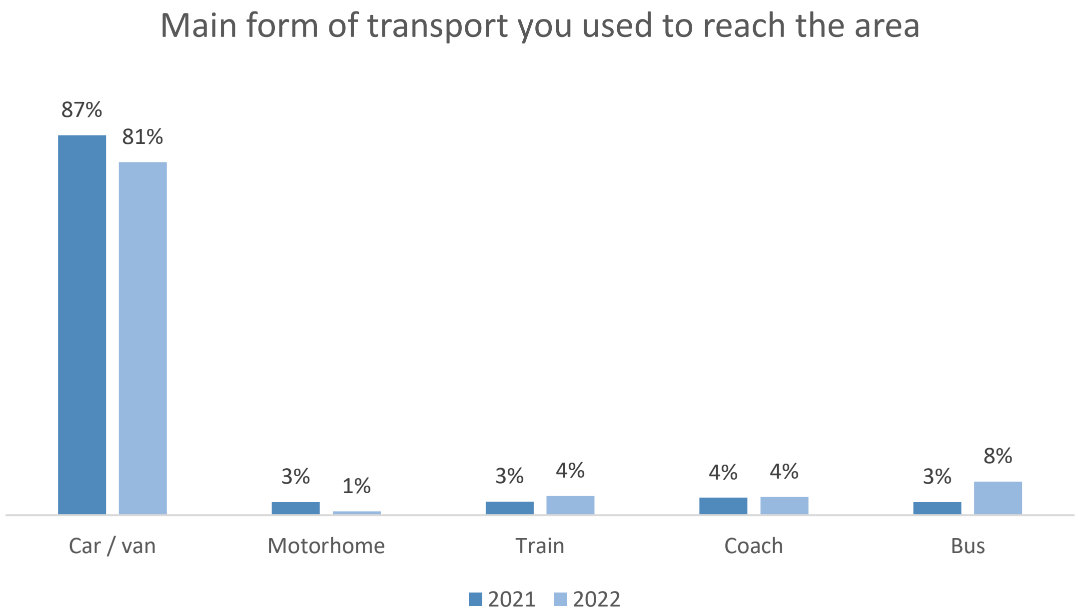




Have you visited the area before? When did you last visit for leisure?

Recent visit to Great Yarmouth - Transport

A large majority of visitors travelled by car (81%) down from 87% in 2021. The difference was noted by an increase in 2022 of those that had travelled by bus (up from 3% to 8%) and train (up from 3% to 4%).



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

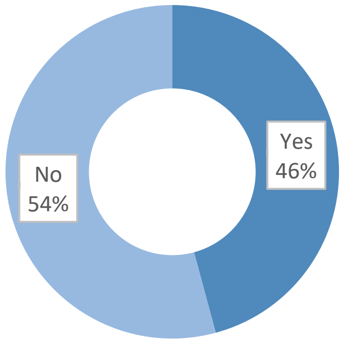
Recent visit to Great Yarmouth – Car parking

Just under half of car users made use of the public parking areas (46%).

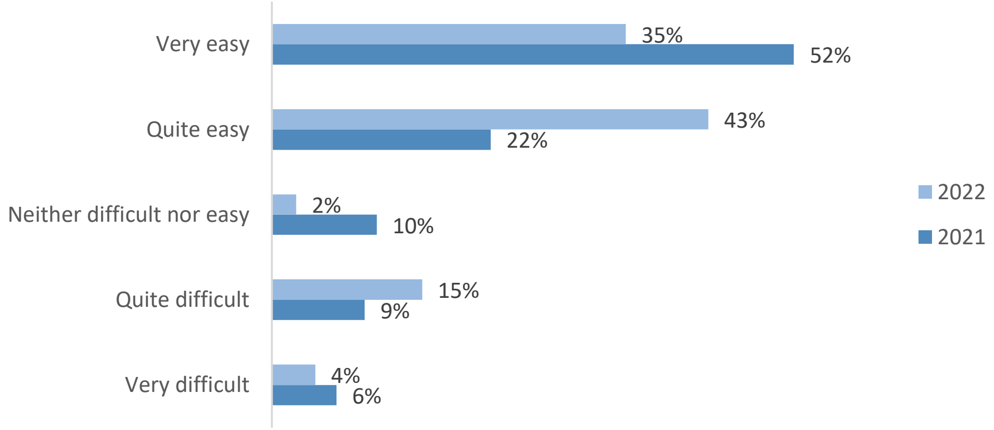
Over three quarters found public car parks ‘easy’ (43% up from 22% in 2021) or ‘very easy’ (35% up from 22% in 2021) to find. On the other hand, 19% found it ‘difficult’ (15%) or ‘very difficult’ (4%).

Just over a third considered the cost of parking to be ‘quite’ (25%) or ‘very’ (11%) expensive, down from almost a half in 2021. Almost one in five (23%, down from 37%) thought it was ‘about average’. Conversely, 29% said it was ‘reasonable’ and 10% found it ‘very reasonable’ both a significant rise from 2021.

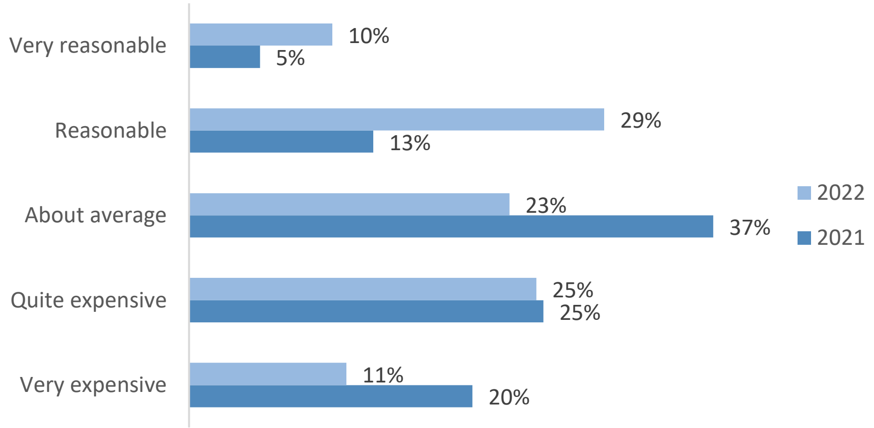
Used any of the public car parks?



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

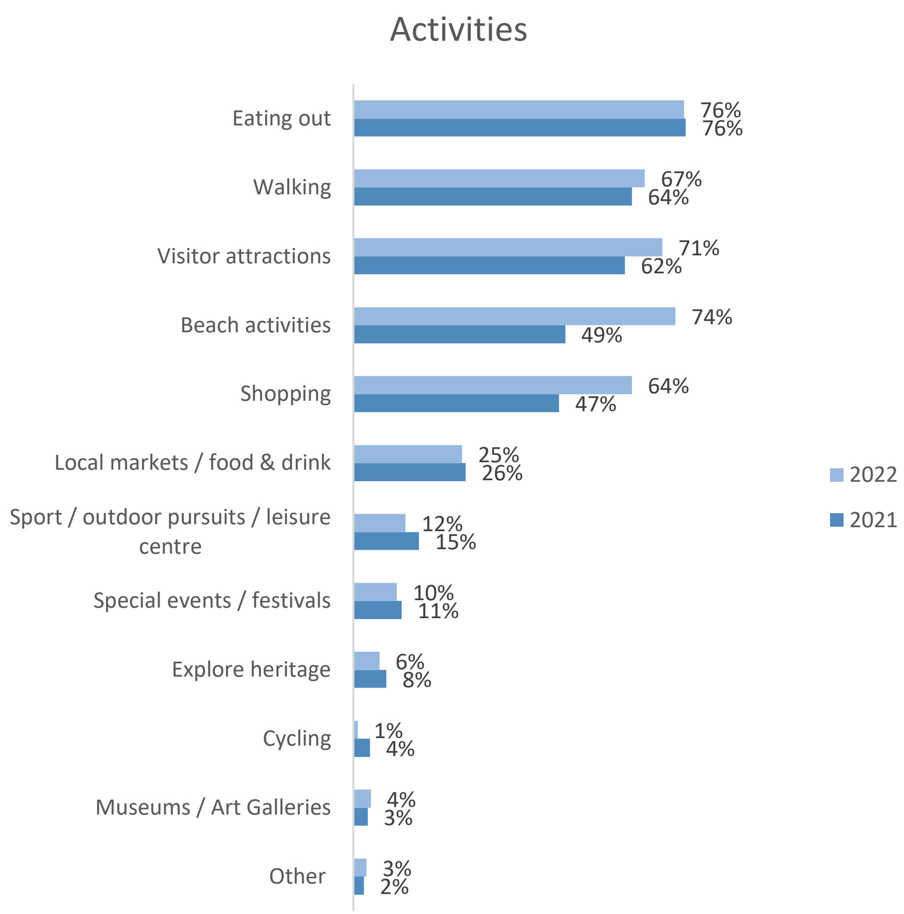
Eating out, walking and beach activities were the top three activities that respondents engaged in during their visits to the area with beach activities replacing going to visitor attractions in the top 3 in 2022.

Three quarters of respondents (76%) said they ate out. As you would expect, this proportion was greater among staying visitors. Beach activities rose to 74% from 49% perhaps as a result of the prolonged good weather.

Over two thirds (67%) took the opportunity to go for a leisure walk and a similar proportion (71%) went to one of the local visitor attractions.

Two thirds of visitors went shopping (64%) up from just under half (47%) in 2021.

Smaller proportions of respondents took part in other activities, including visits to local markets (25%), outdoor activities (12%), attending special events (10%) and visiting heritage sites (6%), museums and art galleries (4%).



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 6.1 nights, meaning that the average expenditure per person and per overnight trip was £281.81 (up from £235.37 in 2021).

Day visitors from home spent an average of around £30.11 per person per day in the area, with eating out accounting for the highest proportion of expenditure (slightly down from £30.74 in 2021).

Spend per person	Overnight Trip	Day trip
Accommodation	£16.76	
Food and drink	£7.49	£11.65
Shopping	£12.94	£7.03
Entertainment	£4.51	£6.36
Transport	£4.51	£5.08
	£46.20	
Nights x trip	6.1	
Total	**£281.81**	**£30.11**

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).

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 comparative results from 2021 and 2022 can be seen in the char on the following page.

The highest satisfaction score was ‘find their way round’ (4.72). Other high scorers were for ‘overall impression (feeling welcome)’ with an average score of 4.71 and the ‘overall impression (general atmosphere)’ (4.69) – these were both significant improvements over 2021 when they both scored 4.51.

Next highly rated were related to the quality of the beach experience (4.66), as well as the cleanliness of the beach and coastline (4.64).

The lowest scoring indicator from 2021 relating to the availability of shops (3.71) has risen significantly (3.91).

Accessibility (3.87) and public toilets in terms of cleanliness and availability were also in the lower part of the table (3.35 and 3.47 respectively), the latter two toilet related dropped further from 2021 to 2022.

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

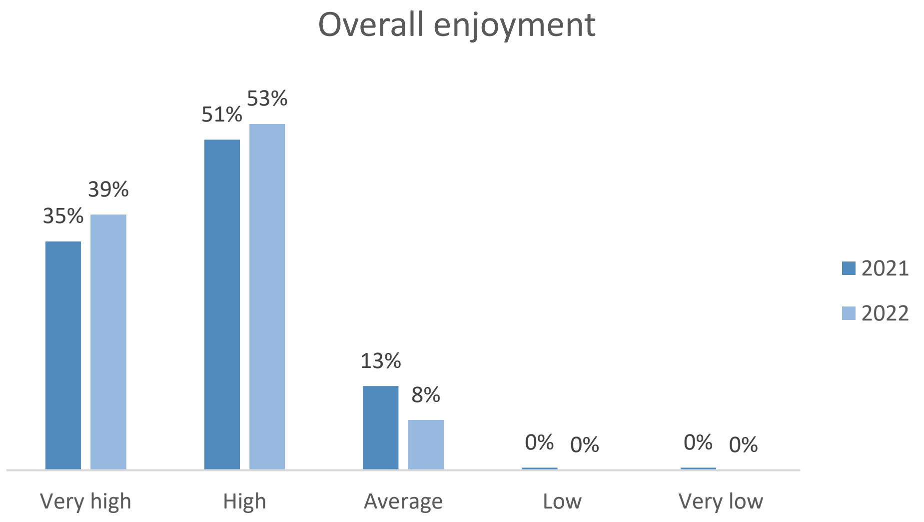
Satisfaction – Key attributes

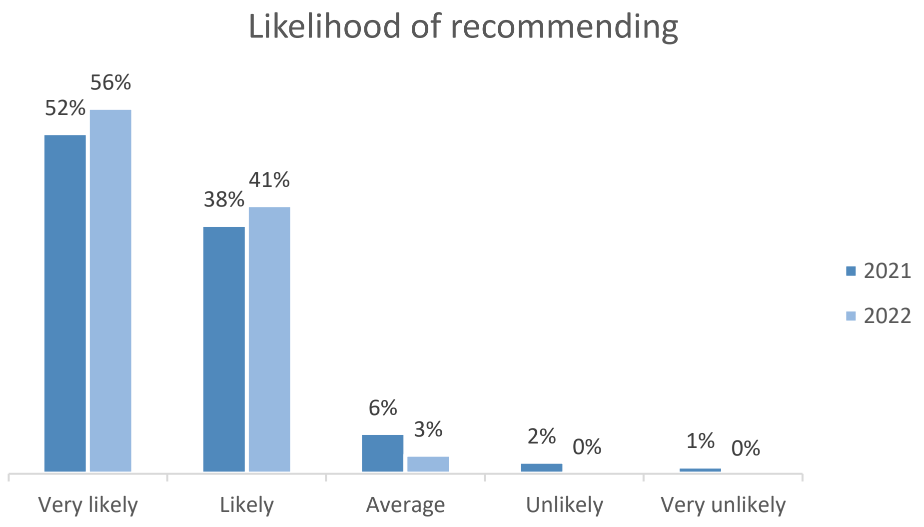
Attributes	Very poor	Poor	Average	Good	Very good	Average score	Score 2021	Variation
Ease of finding your way around	0%	0%	1%	25%	73%	**4.72**	4.71	0.01
Overall impression (feeling of welcome)	0%	0%	2%	26%	73%	**4.71**	4.51	**0.20**
Overall impression (general atmosphere)	0%	0%	2%	27%	71%	**4.69**	4.51	**0.18**
Quality of beach experience	0%	0%	3%	27%	70%	**4.66**	4.73	-0.07
Beach/Coastline Cleanliness	0%	0%	3%	26%	69%	**4.64**	4.69	-0.05
Attractions	0%	1%	8%	42%	50%	**4.40**	4.44	-0.04
Maps and Information Boards	2%	3%	9%	30%	57%	**4.38**	4.47	-0.09
Watersports/outdoor recreation (e.g. cycling)	0%	2%	8%	43%	47%	**4.36**	4.53	-0.17
Places to eat and drink	0%	2%	10%	41%	46%	**4.32**	4.44	-0.12
History & Heritage	0%	2%	12%	46%	40%	**4.24**	4.24	0.00
Pedestrian signposting	0%	1%	14%	57%	28%	**4.12**	4.25	-0.13
Arts/Culture	0%	5%	16%	52%	27%	**4.01**	4.06	-0.05
Prams/buggies access	3%	8%	16%	35%	38%	**3.97**	4.03	-0.06
Traffic levels/congestion	1%	3%	19%	55%	23%	**3.95**	4	-0.05
Shops	2%	3%	26%	41%	28%	**3.91**	3.71	0.20
Disabled accessibility	4%	11%	15%	37%	34%	**3.87**	3.75	0.12
Public toilets in terms of availability	7%	18%	21%	28%	25%	**3.47**	3.86	**-0.39**
Public toilets in terms of cleanliness	6%	14%	34%	33%	14%	**3.35**	3.8	**-0.45**

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 (39% said their levels of enjoyment were 'very high' and 53% rated them as 'high' – both up from 2021). As a result, an impressive 97% said they were 'likely' (41%) or 'very likely' (56%) to recommend Great Yarmouth to friends and relatives as a tourist destination – this is a rise of 90% from 2021. In 2022 no visitors asked said they were unlikely or very unlikely to recommend the area.





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. These themes have not changed since 2021 – they have largely remained the same.

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. 'Overcrowded' that was a high mention in 2021 was barely mentioned but replaced with 'road works'. Other mentions were 'homeless/begging', 'drugs'. 'Toilets' were mentioned often as being dirty and not enough of them. There was less mention of expensive accommodation costs and food outlets.

Car parks (charges and availability)
Road works

homeless/begging
Drugs
Anti social behaviour

Toilets – dirty and not enough

Seagulls

Litter / poor cleanliness
Messy

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'. These themes have not changed much between 2021 and 2022 The main addition is attractions by the sea – crabbing/seal trips, launching for watercraft.

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

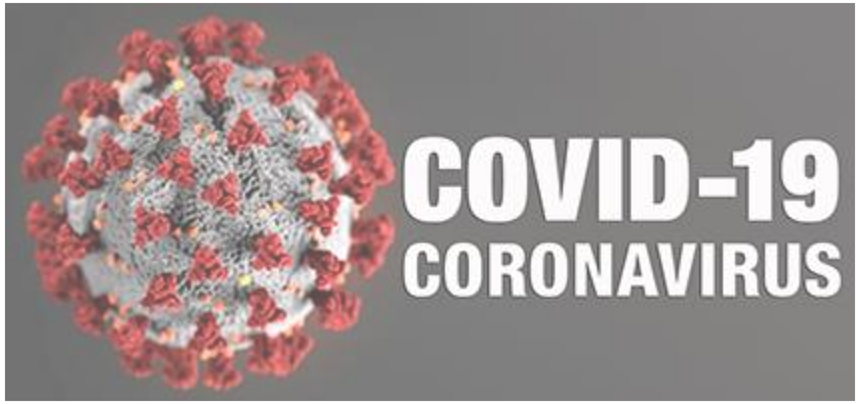
Winter gardens

Waterside attractions – seal trips, crabbing, launching

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

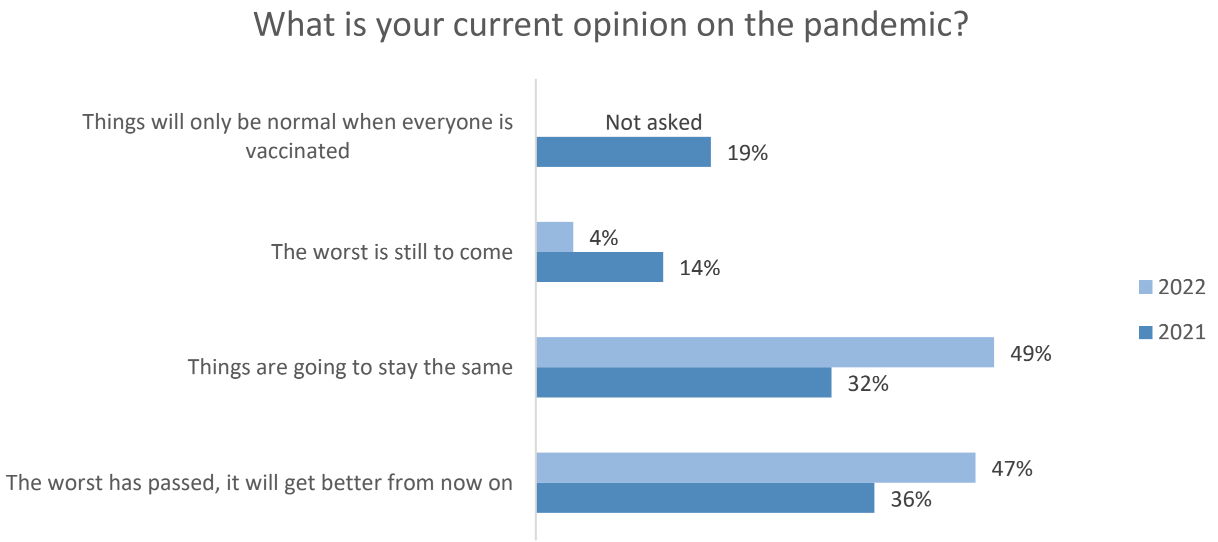
- Has COVID-19 impacted negatively on your chances of taking more holidays or days out than usual?
- What is your current opinion on the pandemic?



View on the Coronavirus pandemic

Looking ahead, just under half (47%) believe that the worst of the pandemic has passed and it will get better from now on, up from just over a third (36%) in 2021. A further 49% think things are going to stay the same as they were at the time of the interview (up from 32% in 2021). Only 4% (down from 14%) still believe the worst is yet to come.

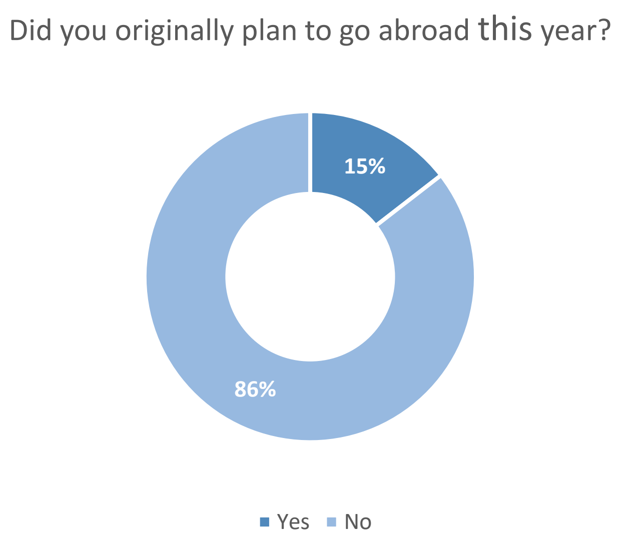
Note that the option 'things will only be normal when everyone is vaccinated' was removed from the 2022 survey.

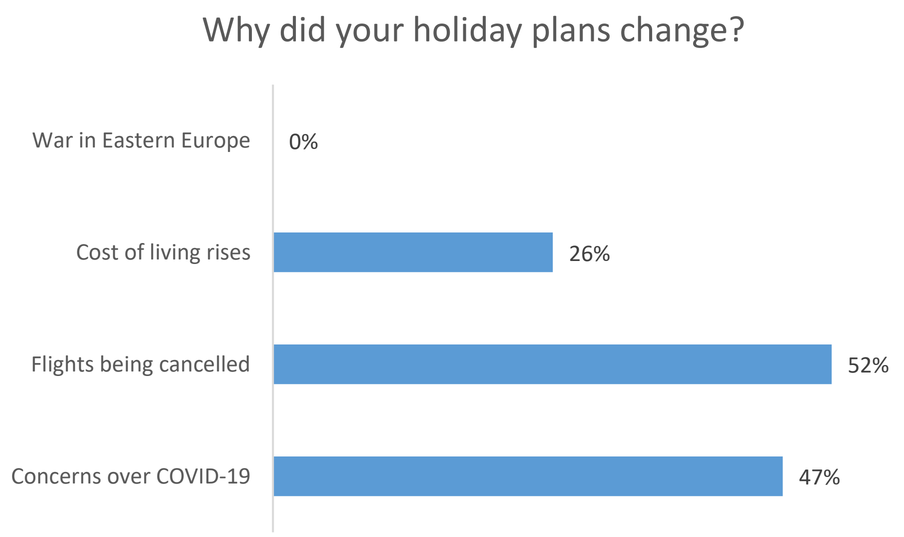


New questions for 2022

15% were planning on going abroad this year and then changed their plans. The majority (86%) already had plans for a UK destination.

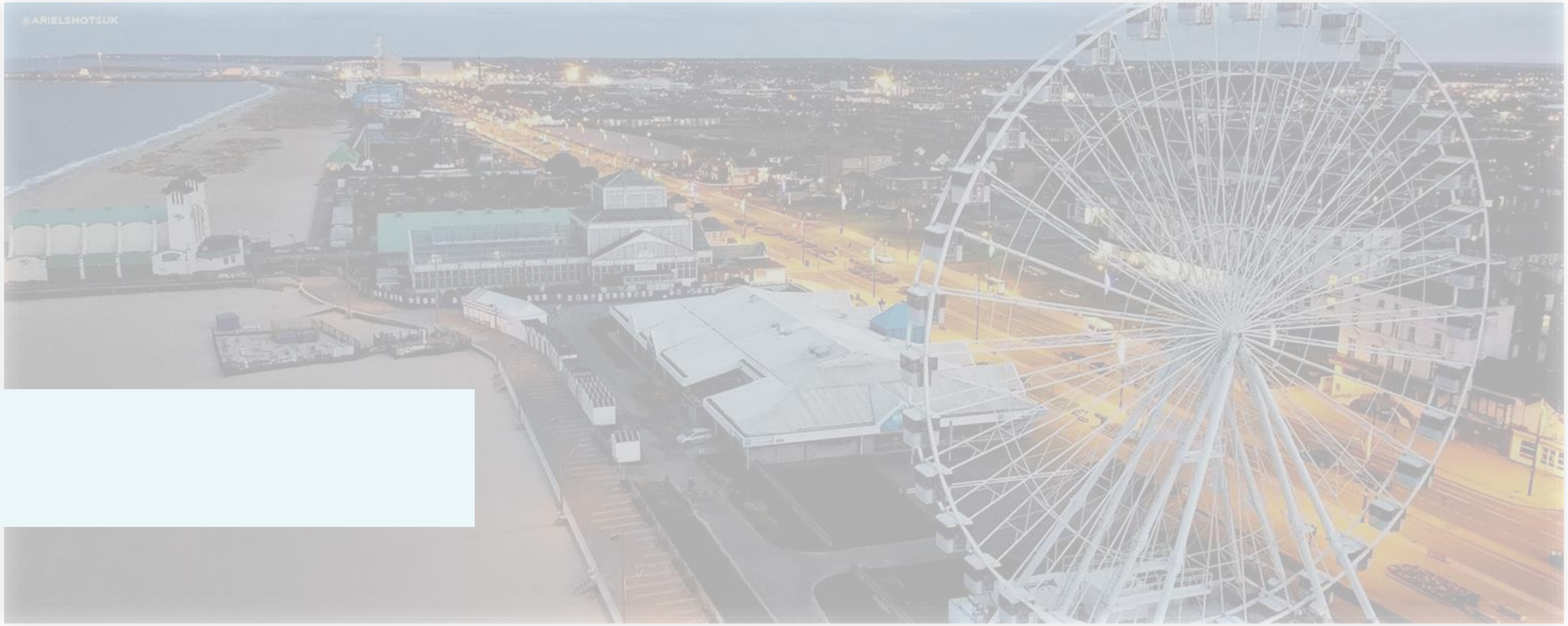
Of those that changed their plans flights being disrupted and continued concerns over Covid-19 were the tope reasons with 52% and 47% quoting those reasons with 26% quoting cost of living rises as one of their concerns.





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 (53%) took part in the survey.
- Family groups were the most usual visiting parties.
- Most visits (91%) were for leisure / holiday purposes and 73% 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 (86%) stayed in Great Yarmouth itself.
- On average, overnight visitors spent 6.1 nights away from home.
- Self-catering forms of accommodation made up half (51%) of all stays in paid accommodation. One third (29%) used serviced accommodation.
- Two thirds of day visitors (76%) spent all day in the area.
- Overall, 88% visitors rated their accommodation as ‘good’ (40%) or ‘very good’ (44%). And 82% said value for money was ‘good’ (36%) or ‘very good’ (46%).
- Almost two thirds (63%) book their accommodation directly with the provider.

About recent visits

- The vast majority of respondents (91%) had visited Great Yarmouth previously. More than two in five (49%) had visited within the last year.
- A large majority of visitors travelled by car (81%).
- Just under half of car users made use of the public parking areas. Three quarters (78%) found them easy to find and 36% found them to be expensive.
- Eating out, the beach 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 £46.20 per day and £281.81 per overnight trip. Day visitors spent an average of £30.11 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 ease of finding their way round and the overall impression (atmosphere and welcome) and the quality of the beach experience.
- The lowest scoring indicators related to the disabled accessibility, accessibility and public toilets in terms of cleanliness and availability.
- Satisfaction scores were very positive with most visitors (92%) rating highly their overall enjoyment. As a result, 97% 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’ and ‘road work’ issues followed by ‘anti social behaviour’,’ ‘run down’ and ‘costs’.
- A potential development of new attractions or infrastructure generated opinions relating to ‘shopping’ and a new leisure / swimming centre and waterside attraction.

About the COVID-19 pandemic

- Looking ahead, just over a third (47%) believe that the worst of the pandemic has passed and it will get better from now on.
- A further 49% think things are going to stay the same as they were at the time of the interview.
- Only 4% still believe the worst is yet to come.
- 15% had planned to go abroad in 2022 but had changed their plans, of these 52% cited cancellation of flights, and 47%. concerns over Covid as their reasons

Produced by:

Main contact:

Asa Morrison
Chief Executive
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