Great Yarmouth Visitor Survey

September 2024

Prepared by:

destinationresearch
delivering results : measuring what matters

On behalf of:

GREATER Yarmouth
TOURISM & BUSINESS IMPROVEMENT AREA

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. Whenever possible, we have compared the results against the 2023 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 2024 until early September 2024. 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

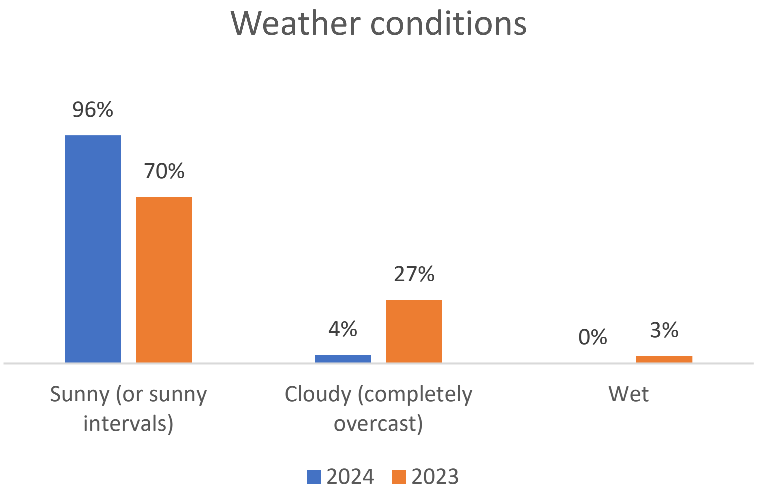
- Please indicate your age
- Please indicate your gender
- Please tell us your home location
- What is your occupation and employment status?
- Your visiting party and the type of trip

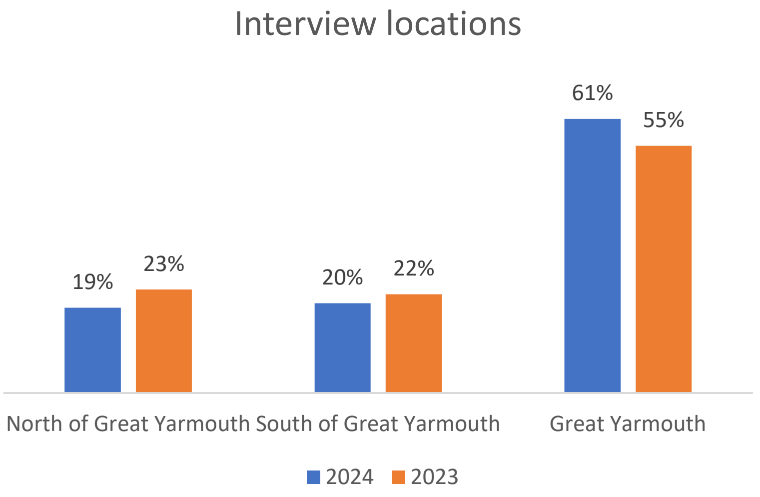
About the respondents – Setting the scene

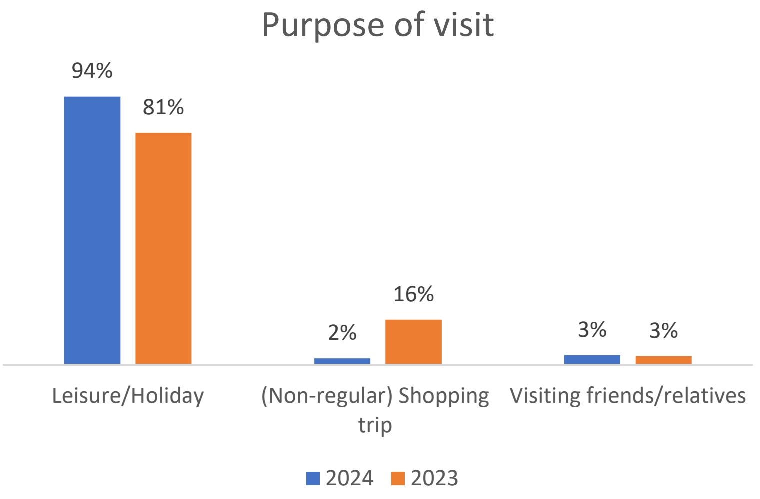
The first section of this report sets the scene in terms of who was included in the survey, where interviews took place and a summary of weather conditions. It also provides an overview of their profile in terms of place of residence, gender, age group, socio-economic status and usual visiting party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

The majority of interviews (61%) were conducted in Great Yarmouth (Promenade between Pleasure Beach and Waterways, Regent Road), 20% in the south of Great Yarmouth (Hopton and Gorleston on Sea -north end of the beach), and 19% to the north of Great Yarmouth (Winterton-on-Sea -beach car park, Caister on Sea - car park area, Newport and Hemsby - beach road and beach car park).

Of the total sample of interviews, 94% were visiting for leisure / holiday purposes, 3% were visiting either friends or family and 16% were on a non-regular shopping trip.



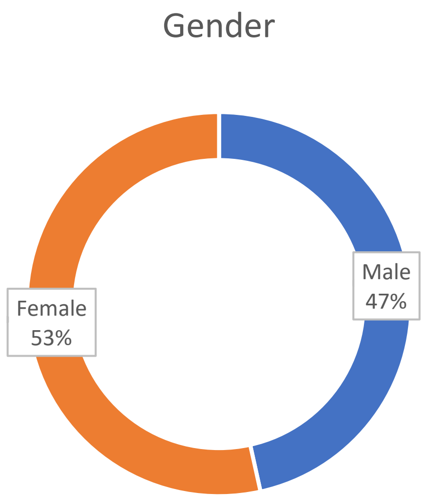


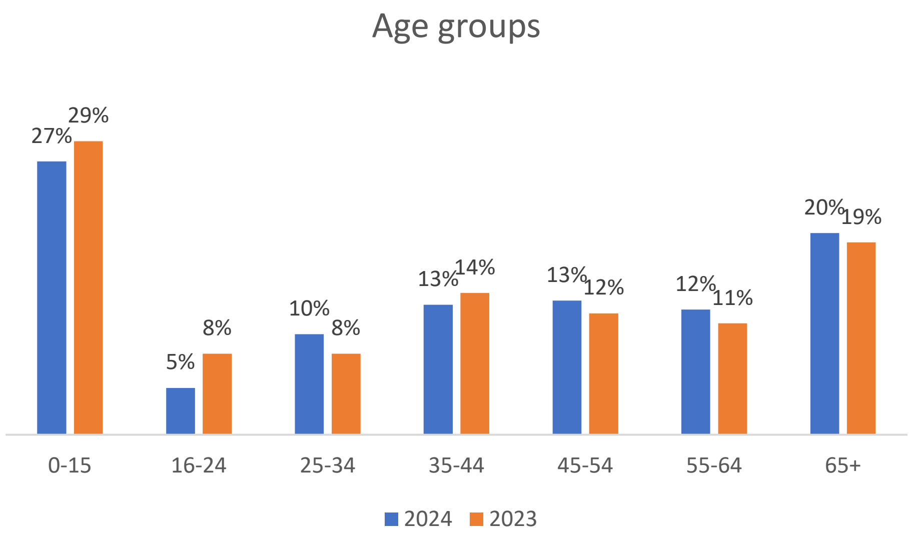


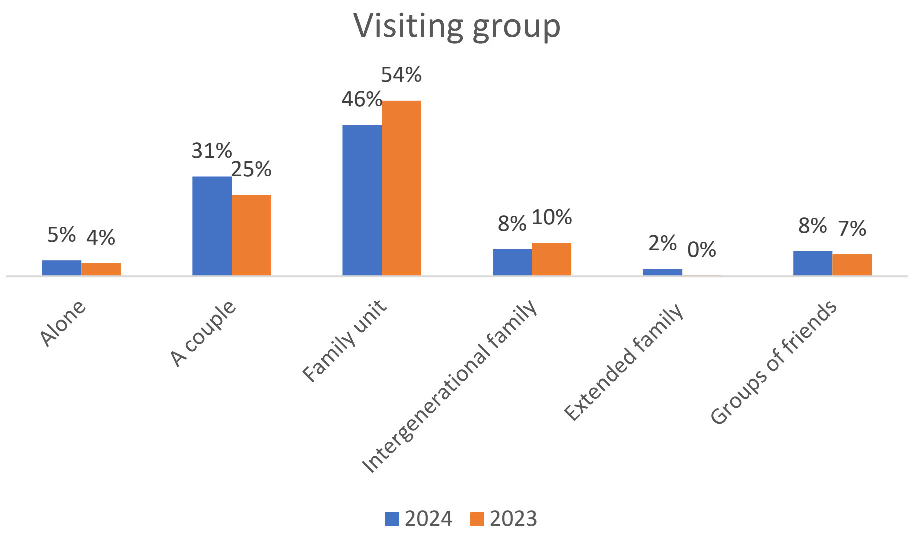
What is your main reason for visiting?

About the respondents

A higher proportion of women (53%) took part in the survey (unchanged from 2023). Children accounted for 27% of the sample and young adults for a further 5%. There was a fairly even split among all adult age groups, although those over 65 held the largest share at 20%. Family units were the most usual visiting group (46%). When extended and intergenerational families were included, the total increased to 56%. Three in ten (31%) travelled as a couple and 5% visited alone. Finally, 8% of respondents were part of a group of friends.





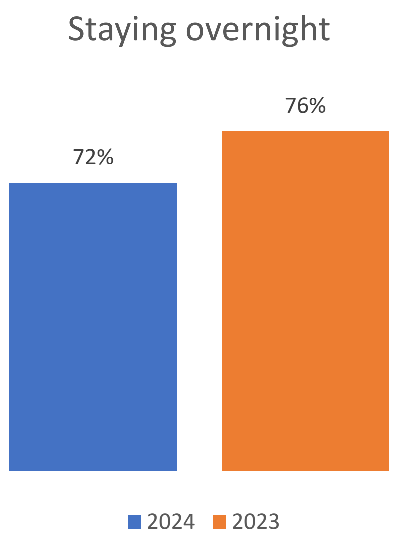


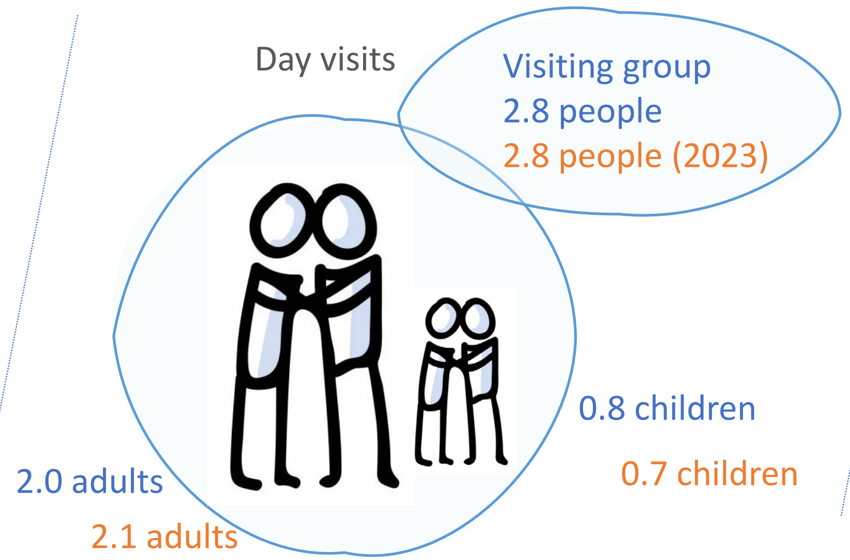
How many people in your immediate family are male and female and which age categories do they fall into?
How would you describe your visiting party?

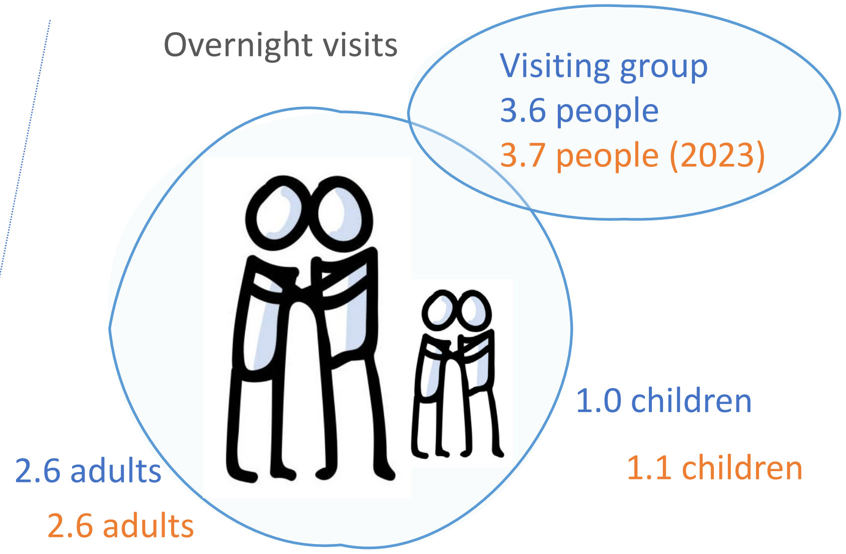
About the respondents

The sample included a larger proportion of visitors staying overnight in the area (72%). This is slightly lower than 2023 when 76% were on an overnight visit. On average, visitors staying overnight visited in groups of 3.6 people (2.6 adults and 1.0 children).

The remaining 24% of respondents were in the area as part of a day trip. Their usual visiting group was smaller at 2.8 people per visiting group (2.0 adults and 0.8 children per group).



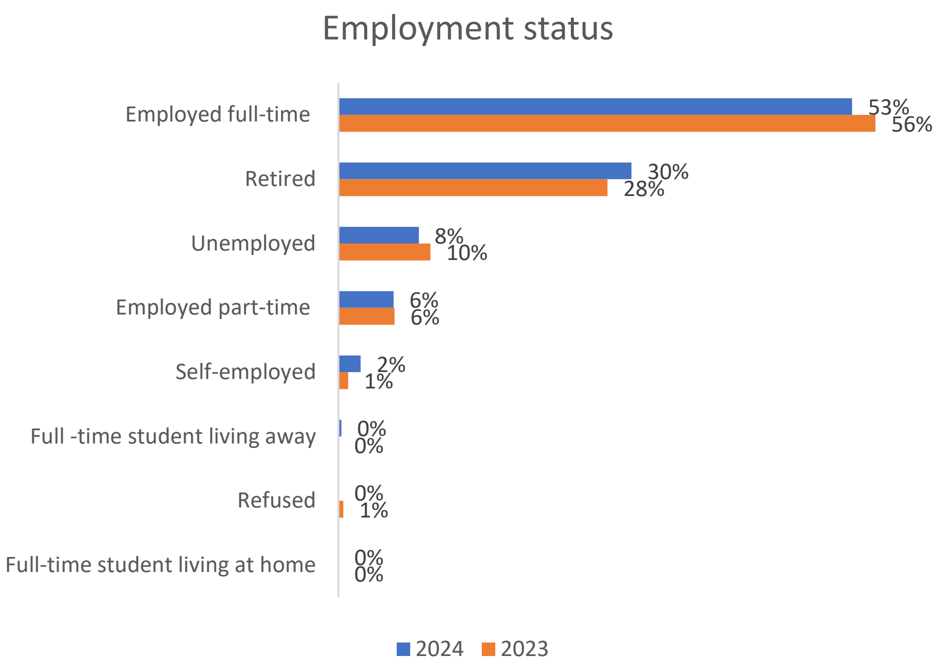


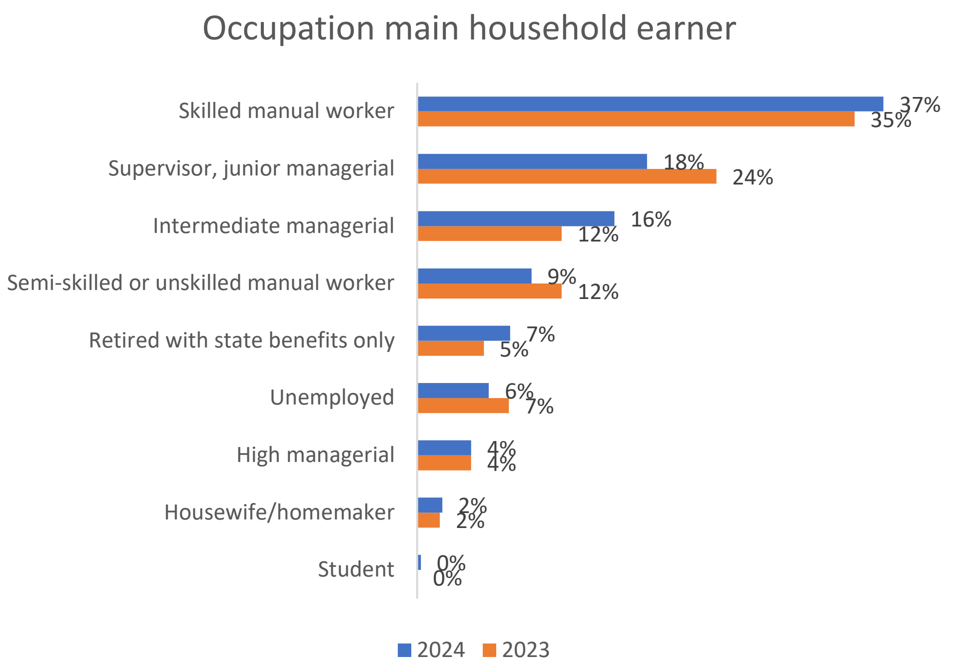


Are you staying overnight during your trip?
How many people in your immediate family are male and female and which age categories do they fall into?

About the respondents

Slightly more than half (53%) were in full-time employment (up from 56% in 2023) and a further 30% were retired (up from 28% in 2023). In terms of the key occupations, skilled manual workers (37%) up from 35% in 2023, junior managerial (18%), up from 24% in 2023, and intermediate managerial jobs (16%), up from 12% in 2023, account for every seven out of ten jobs - a figure that has stayed constant to last year.





About the respondents

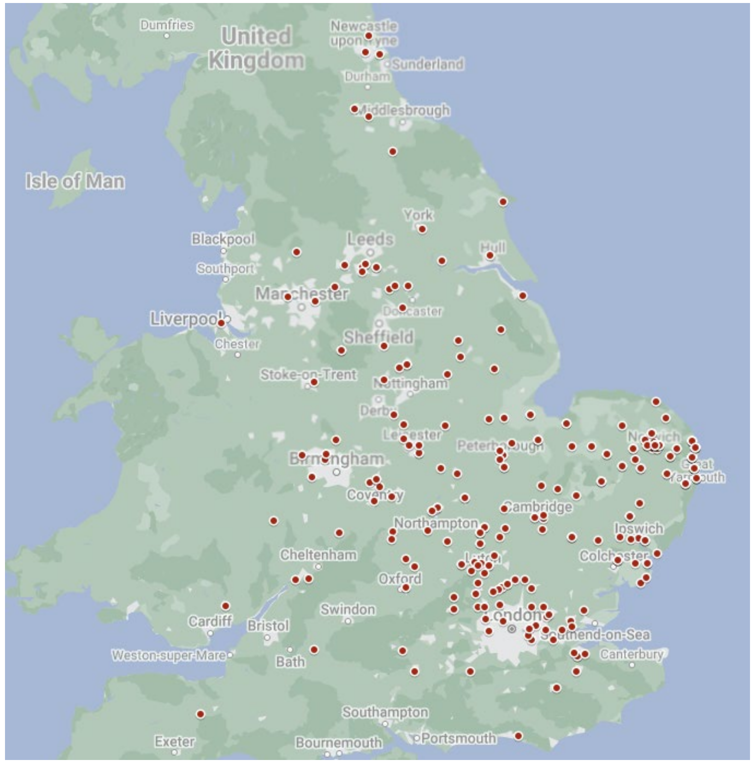
East of England, East Midlands and South East regions account for 73% of all visitors. The proportion of visitors from West Midlands has decreased slightly compared to 2023. Day visitors were mainly from the East of England (91%). Overnight visitors originate primarily from within the East of England, East Midlands and the South East. Key areas within these regions include Essex, Nottinghamshire, Warwickshire, Kent, Bedfordshire, Hertfordshire, Cambridgeshire and Lincolnshire.

2024

	ALL	Overnight Visitors	Day Visitors
East of England	49%	36%	91%
East Midlands	14%	18%	1%
South East	10%	14%	0%
West Midlands	8%	10%	0%
Yorkshire and Humber	7%	9%	1%
London	7%	7%	7%
North West	4%	5%	0%
North East	1%	1%	0%
South West	0%	0%	0%
Northern Ireland	0%	0%	0%
Scotland	0%	0%	0%
Wales	0%	0%	0%

2023

	ALL	Overnight Visitors	Day Visitors
East of England	48%	36%	90%
East Midlands	14%	18%	1%
West Midlands	10%	13%	0%
South East	8%	10%	0%
Yorkshire and Humber	7%	9%	1%
North West	7%	6%	7%
South West	4%	5%	0%
Greater London	1%	1%	0%
North East	1%	2%	0%
Northern Ireland	0%	0%	0%
Scotland	0%	0%	0%
Wales	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).

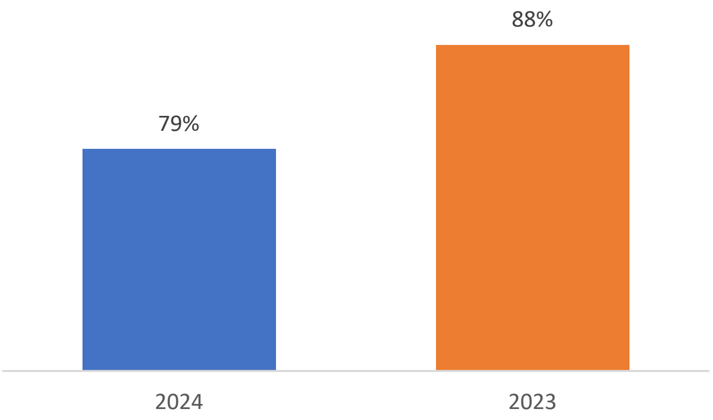
About the respondents - About day and overnight trips

The majority of overnight visitors (79%) stayed in Great Yarmouth itself. As well as Great Yarmouth town, other popular choices included Caister, Hemsby, Gorleston, Scratby and East Somerton within the borough as well as Lowestoft, Kessingland, Wroxham, Norwich and King's Lynn further away.

On average, overnight visitors spent 6.1 nights away from home – a slight decrease from 2023. The number who stay all day in Great Yarmouth as fallen from 68% in 2023 to 54% in 2024 with those staying less than two hours increasing from 5% to 12% and visitors staying for half a day also up, from 26% in 2023 to 34% this year.

Self-catering accommodation made up 63% of all stays in paid accommodation. Static caravans, holiday parks and chalets accounted for 51% of all accommodation used, a drop of 4% over 2023. Touring caravans and camping was up to 5% from 5% in 2023. Cottages and flats accounted for 6% (unchanged from 2023). A third (33%) stayed in serviced accommodation, including hotels (23%) and B&B guesthouses (10%).

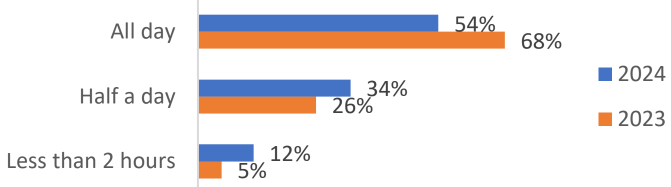
Staying overnight in Great Yarmouth



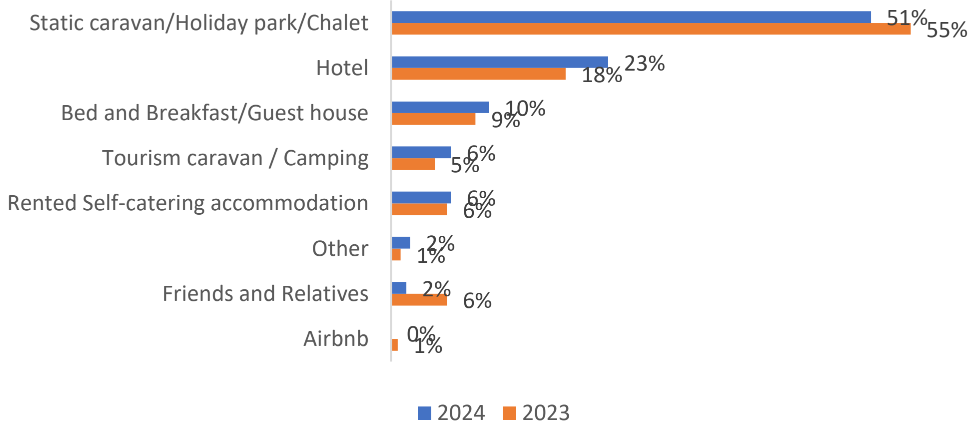
Length of stay (nights)

2024 – 6.1 nights per trip
2023 – 5.9 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 - Trip expenditure

The average overall expenditure among staying visitors to Great Yarmouth on accommodation, eating out, shopping, entertainment and travel and transport was £44.39 per person, per 24 hours (marginally down from £44.86 in 2023). Accommodation and food and drink 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 £270.78 (up from £264.68 in 2023).

Day visitors from home spent an average of £29.42 per person and day, up on the 2022 figure of £26.56 per person per day in the area, with eating out accounting for the highest proportion of expenditure.

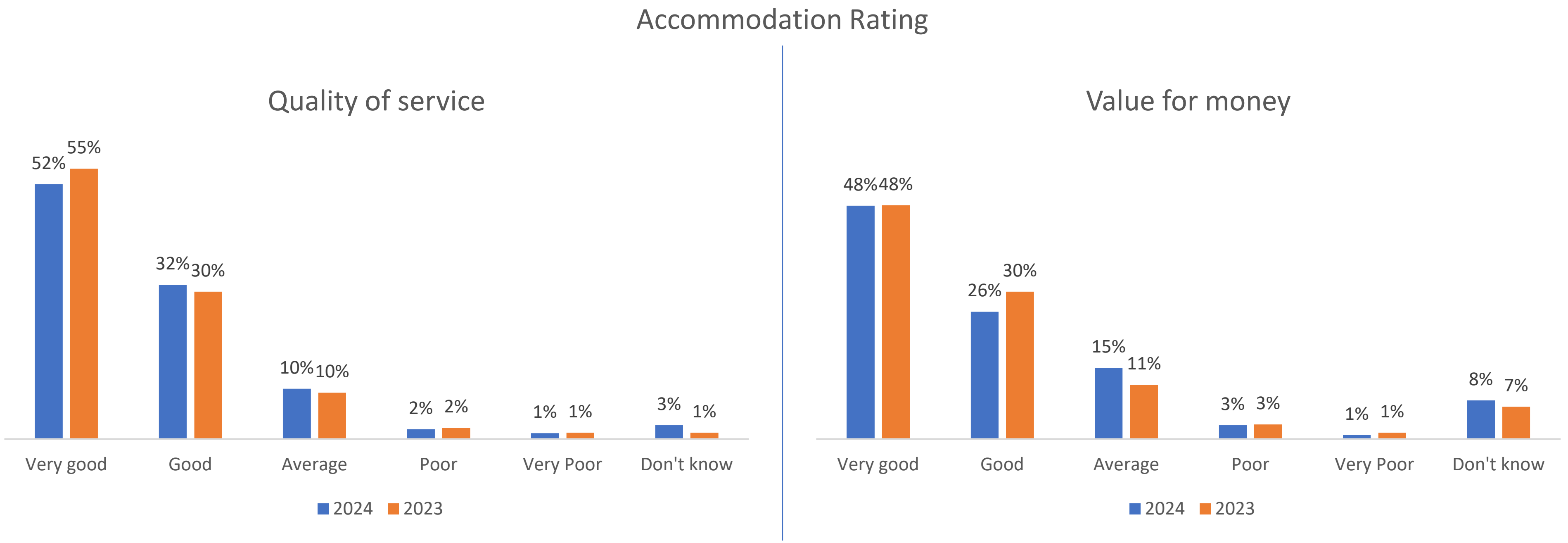
Expenditure 2024	Overnight Trip	Day trip
Accommodation	£25.72	
Food and drink	£6.69	£12.35
Shopping	£5.22	£6.09
Entertainment	£3.49	£7.20
Transport	£3.27	£3.78
Spend per person x day / 24 hours	**£44.39**	**£29.42**
Nights x trip	6.1 nights	
Spend per person x trip	**£270.78**	**£29.42**
Visiting group	3.6 people	2.8 people
Total Spend per visiting party	**£974.82**	**£82.38**

Expenditure 2023	Overnight Trip	Day trip
Accommodation	£23.77	
Food and drink	£5.54	£10.77
Shopping	£9.93	£6.75
Entertainment	£3.22	£5.68
Transport	£2.39	£3.36
Spend per person x day / 24 hours	**£44.86**	**£26.56**
Nights x trip	5.9 nights	
Spend per person x trip	**£264.68**	**£26.56**
Visiting group	3.7 people	2.8 people
Total Spend per visiting party	**£975.40**	**£74.38**

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).

About the respondents - About day and overnight trips

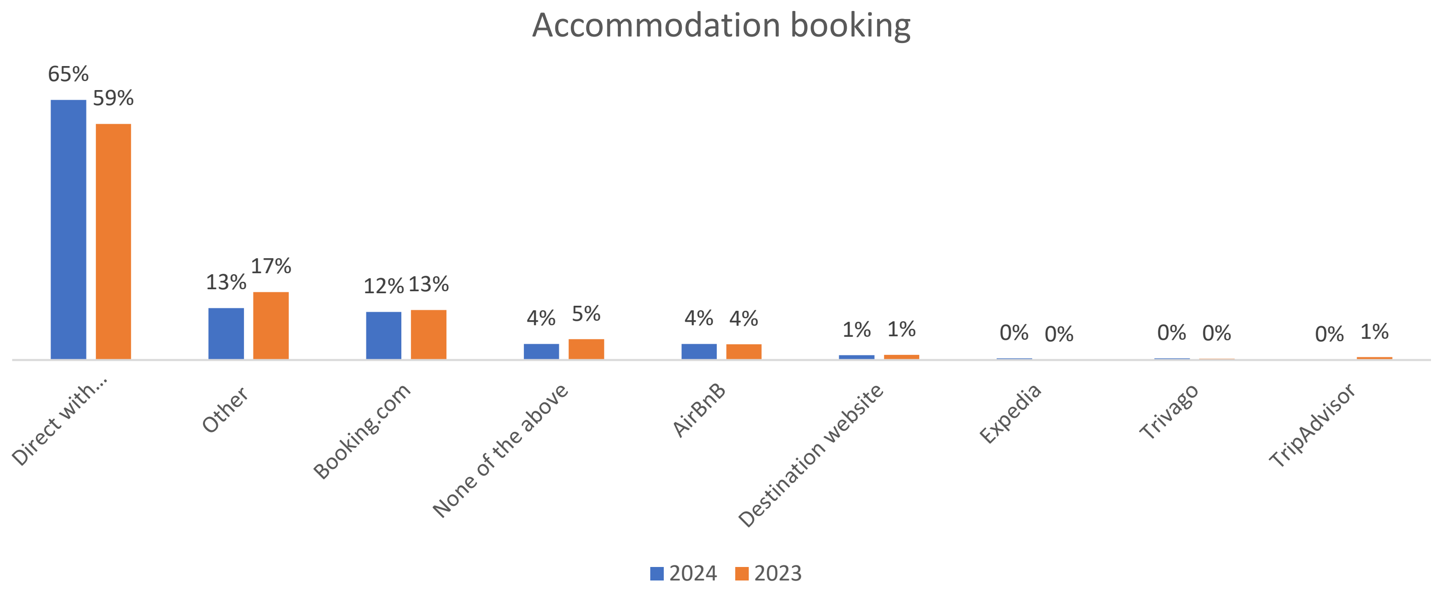
Overall, visitors rated their accommodation highly, with those that rating the service received as Good or Very good staying at a similar level to last year (down from 85% to 84% in 2024). Those that believed that their accommodation offered good or 'very good' value for money fell from 78% to 74%, although those that rated it 'very good' remained unchanged year-on-year.



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

Almost two thirds (65%) booked their accommodation directly with the provider (up from 59% in 2023). The percentage that used an online travel agent (OTA) such as Booking.com, felt slightly from 13% in 2023 to 12% and a further 13% used other methods, including other OTAs, coach trips, caravan clubs and sites and those that stayed with friends or relatives or their own second homes.



Other methods:

- Facebook
- Coach company
- Caravan site
- Friends and relatives
- Own property
- Travel agent

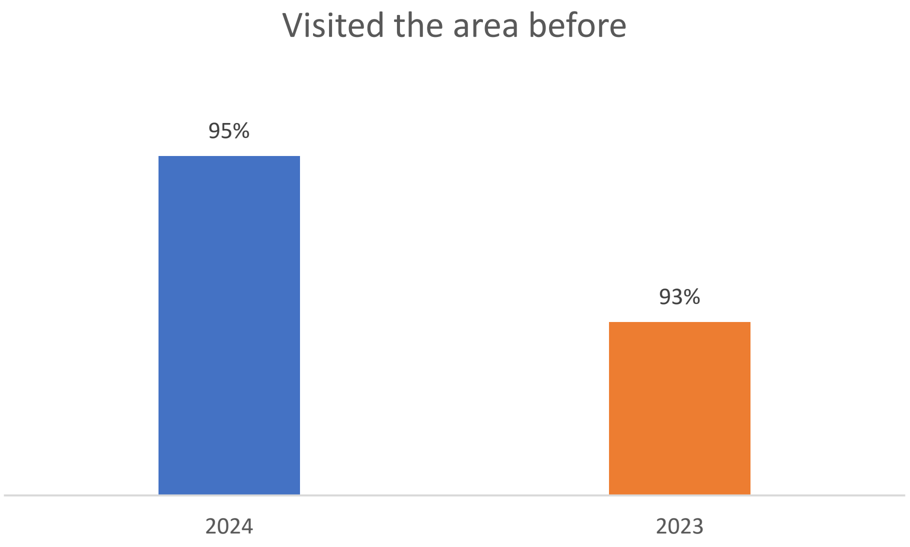
How would you rate the quality of service provided by your accommodation establishment?
How would you rate your accommodation in terms of value for money?

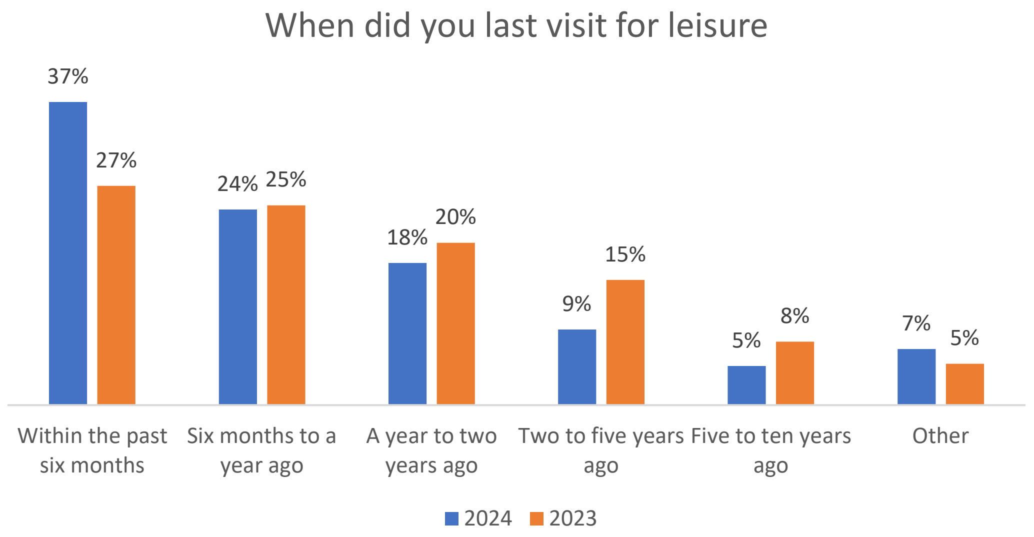
Research Outputs – About recent visits

- 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 and this rose even higher in 2024 (95% up from 93% in 2023). The number that had visited in the past year (past six months and six months to a year) rose in 2024 to 61%, up from 52% in 2023, while those that had visited a year to two years ago fell from 20% in 2023 to 18% in 2024.

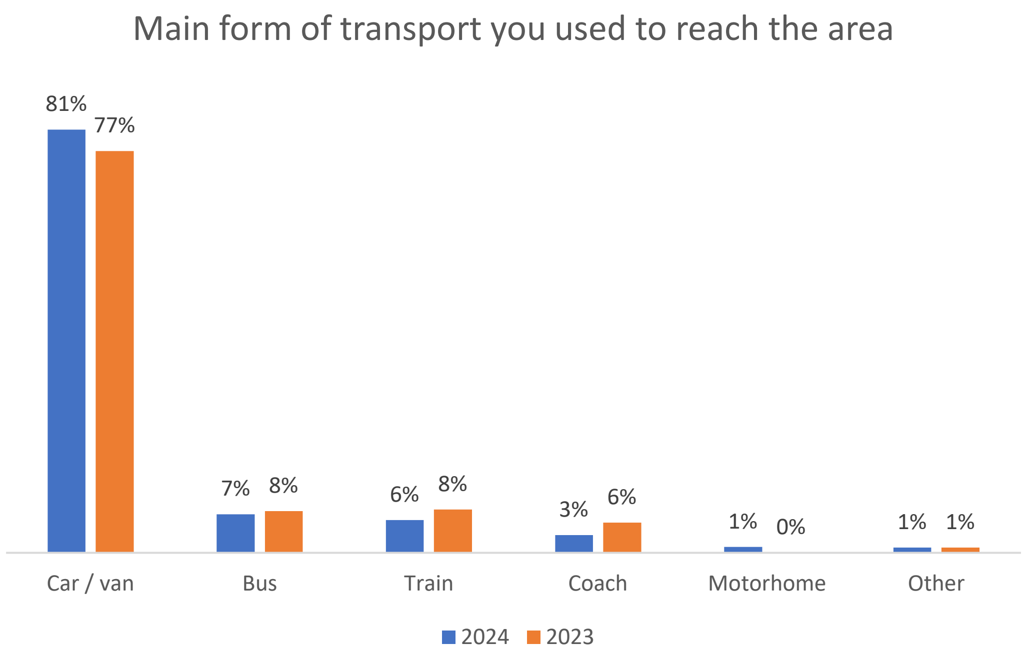




Have you visited the area before? When did you last visit for leisure?

Recent visit to Great Yarmouth - Transport

The proportion of visitors arriving by car this has been falling steadily from 87% in 2021 to the lowest point recorded in 2023 (77%). However, 2024 bucks the trend, with an 4% increase to 81%. The difference was noted by a decrease in 2024 of those that had travelled by bus, train or coach.



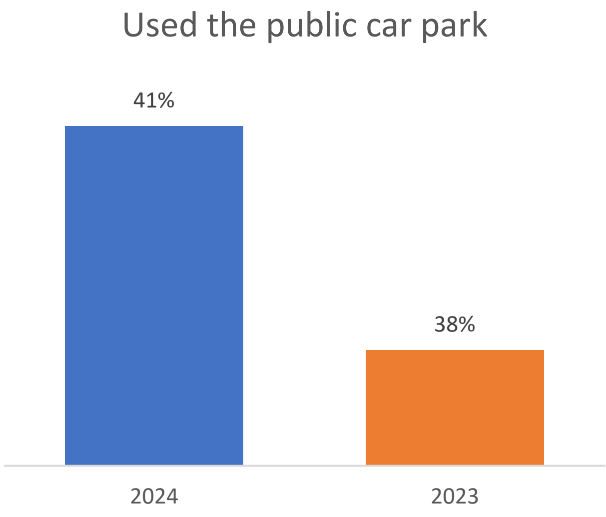
What was the main form of transport you used to reach Great Yarmouth?

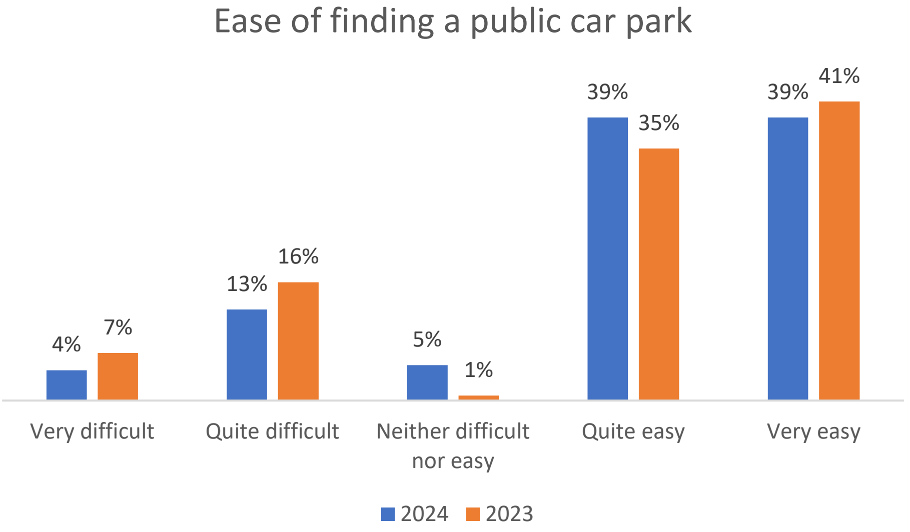
Recent visit to Great Yarmouth – Car parking

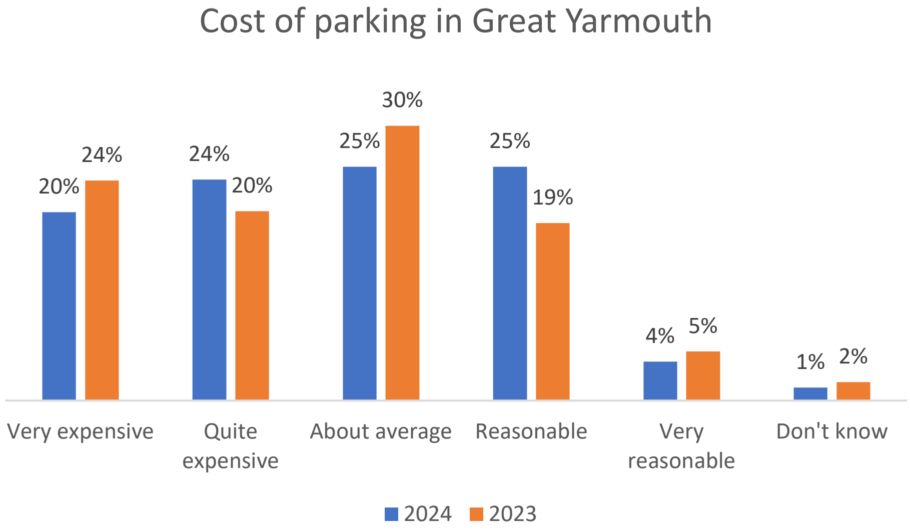
The number of visitors using public car parks rose from 38% in 2023 to 41% in 2024.

Over three quarters said that finding public car parks was either 'quite easy' (39% up from 35% in 2023) or 'very easy' (down to 39% from 41% in 2023). There was a drop in the proportion that found it 'quite difficult' (13% from 16% in 2023) or 'very difficult' (4% from 7% in 2023).

Almost half considered the cost of parking to be 'quite' (24%) or 'very' (20%) expensive. However, a quarter (25% down from 30% in 2023) thought it was 'about average'. A further 25%, (up from 19% in 2023) said it was 'reasonable' and 4% (down marginally from 5%) found it 'very reasonable'.







VISIT 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?

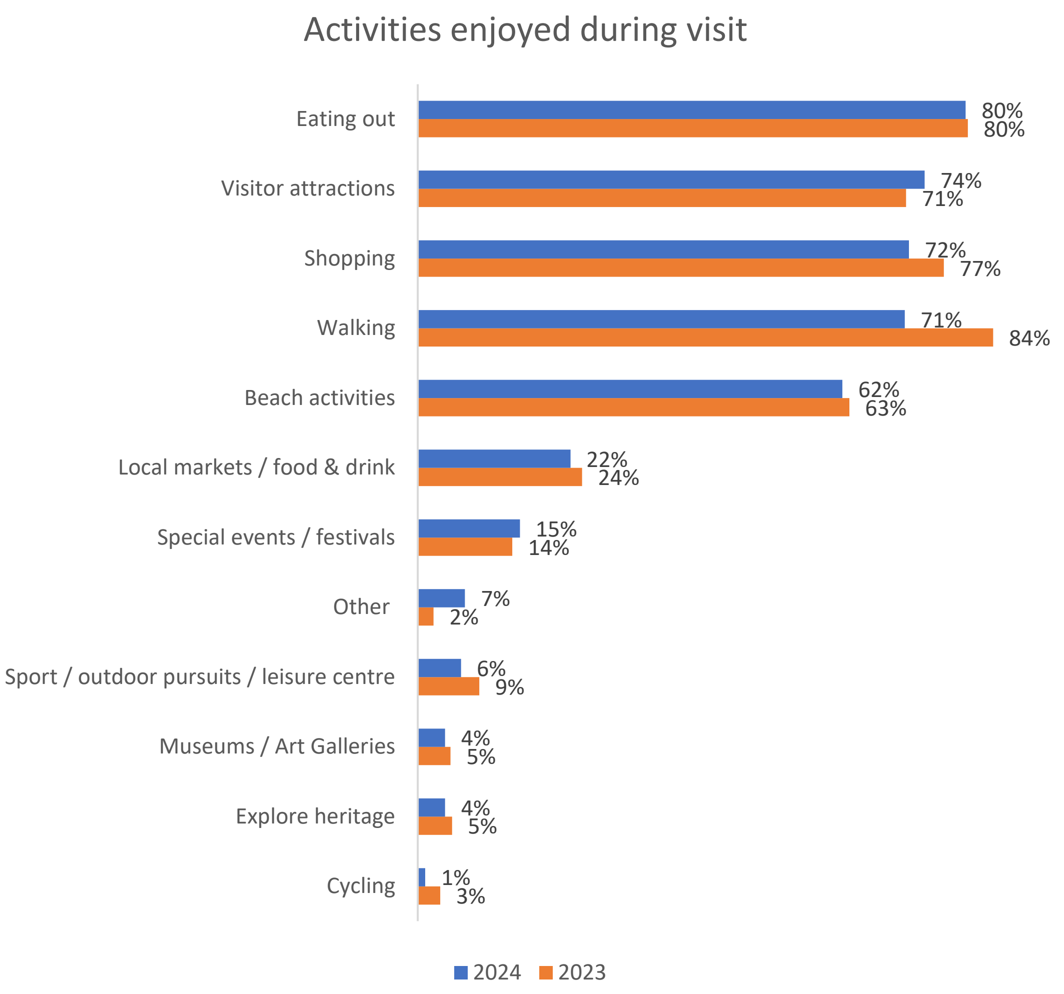
Recent visit to Great Yarmouth – Key activities undertaken

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

Walking fell in popularity, with 71% saying that they had taken part in this activity, from 84% in 2023. Four in five respondents (80%) ate out, unchanged from the previous year.

Just under three quarters (72%) of visitors went shopping down from 77% in 2027. The proportion of respondents that visited an attractions was up since 2023 (74 from 71%).

Smaller proportions of respondents took part in other activities, including visits to local markets (22%), attending special events (15%), outdoor activities (6%), and visiting heritage sites (4%), museums and art galleries (4%).

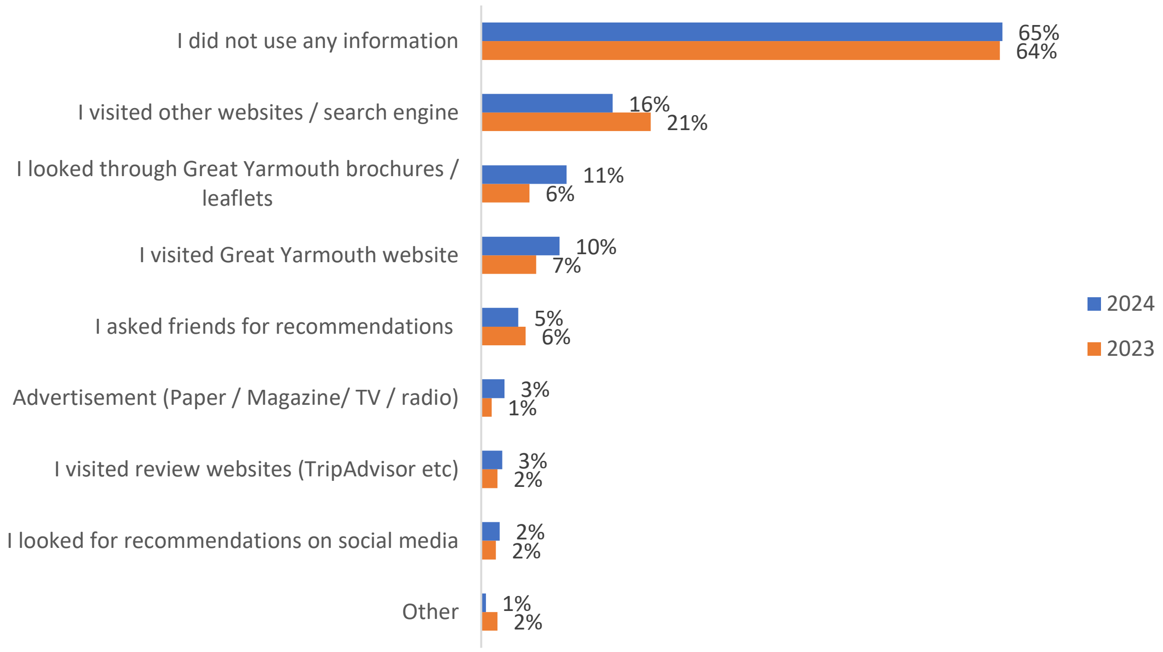


Which of the following activities do you hope to enjoy during your trip? (multiple answers allowed)

Recent visit to Great Yarmouth – 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. The percentage that did not use any information was marginally up from 64% in 2023 to 65% this year. from over three quarters (76%) to below two thirds (64%.). It is encouraging to see that the increase of those that sought information before travelling can be attributed mostly to the use of the Great Yarmouth brochures and website.

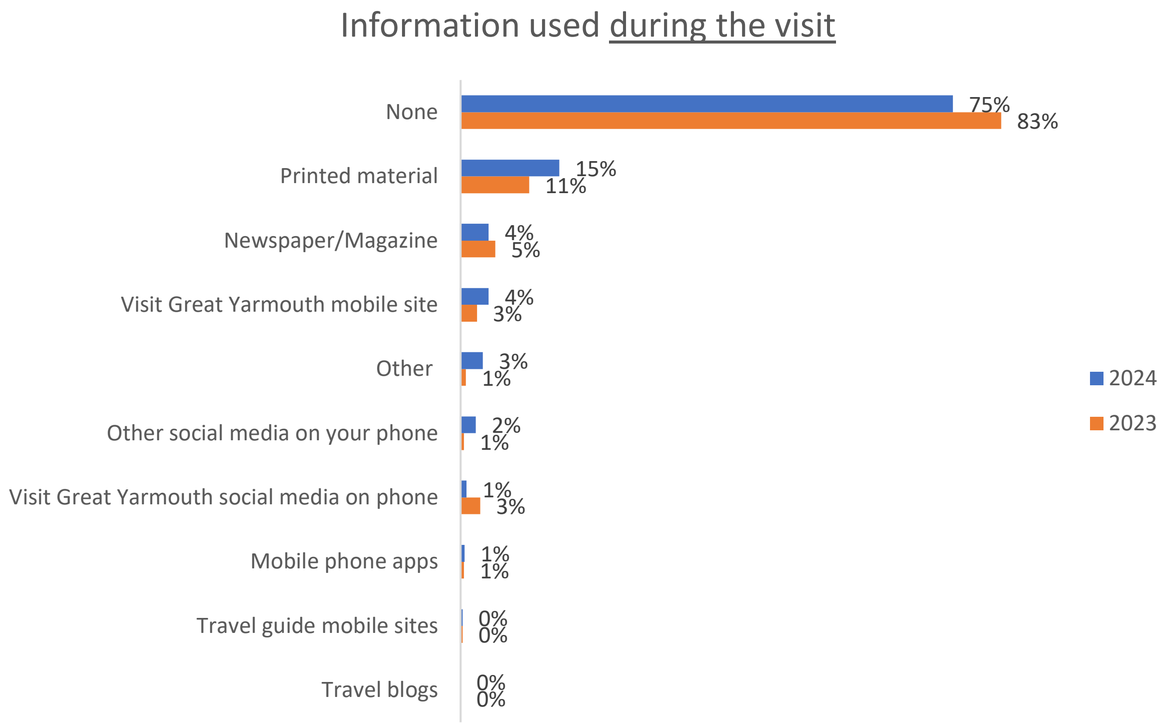
Information used to plan the visit



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 (75%) didn't make use of any information. Those who did cited printed material, newspaper and magazines and the Visit Great Yarmouth mobile site.



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 comparative results from 2022 and 2023 can be seen in the chart overleaf.

The highest satisfaction score was 'find their way round' (4.71). Other high scorers were the quality of beach experience (4.59) and the cleanliness of the beach and coastline (4.58).

Next highly rated were related to 'overall impression' for both feeling of welcome and general atmosphere.

Public toilet, both cleanliness (2.91) and availability (3.24) were the lowest scoring. Shops were also in the lower part of the table (3.88).

The scores that rose the most from 2023 were for traffic levels and congestion (a rise of 0.04) and attractions (a marginal rise of 0.02). Overall, the satisfaction scores were lower than in 2023.

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

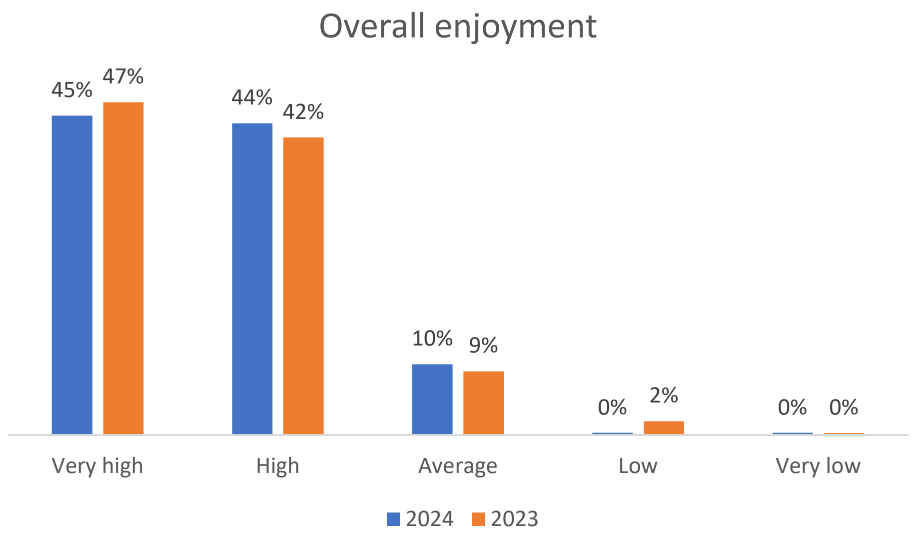
Satisfaction – Key attributes

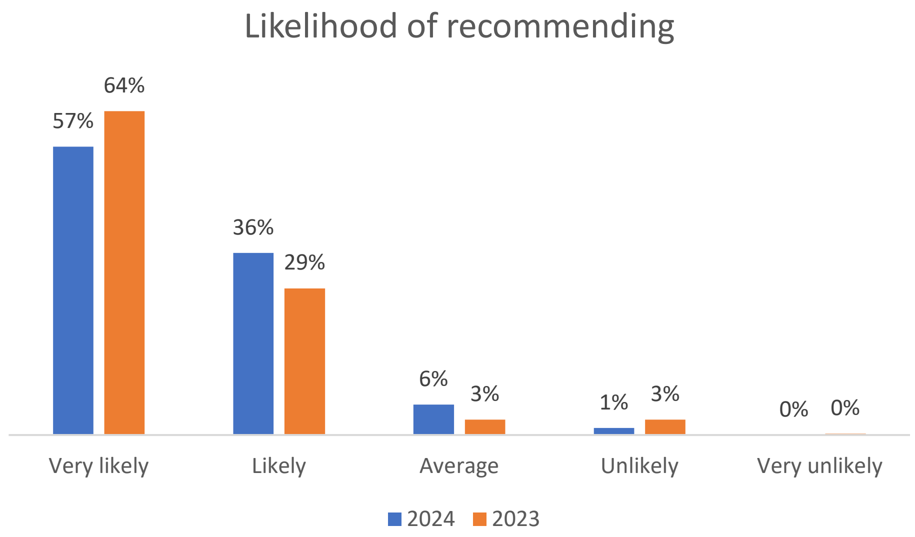
	Very poor	Poor	Average	Good	Very good	Average 2024	Average 2023	Variation
Ease of finding your way around	0%	0%	2%	24%	74%	4.71	4.73	***-0.02***
Quality of beach experience	0%	0%	5%	31%	64%	4.59	4.68	***-0.09***
Beach/Coastline Cleanliness	0%	0%	5%	32%	63%	4.58	4.63	***-0.05***
Overall impression terms of feeling of welcome	0%	1%	3%	41%	55%	4.49	4.61	***-0.12***
Overall impression in terms of general atmosphere	0%	2%	3%	43%	53%	4.45	4.60	***-0.15***
Attractions	0%	1%	9%	43%	46%	4.35	4.32	0.02
Watersports/outdoor recreation (e.g. cycling)	1%	3%	10%	38%	48%	4.30	4.37	***-0.07***
Places to eat and drink	0%	2%	13%	38%	47%	4.29	4.34	***-0.05***
Maps and Information Boards	1%	6%	14%	33%	47%	4.19	4.43	***-0.24***
Prams/buggies access	2%	6%	10%	38%	44%	4.17	4.26	***-0.09***
Pedestrian signposting	1%	2%	12%	54%	31%	4.14	4.28	***-0.13***
History & Heritage	1%	3%	16%	44%	36%	4.12	4.32	***-0.21***
Disabled accessibility	3%	6%	14%	35%	42%	4.08	4.10	***-0.01***
Traffic levels/congestion	1%	3%	13%	55%	28%	4.05	4.01	0.04
Arts/Culture	3%	4%	17%	45%	31%	3.97	4.15	***-0.19***
Shops	1%	6%	26%	38%	29%	3.88	3.94	***-0.06***
Public toilets in terms of availability	11%	19%	24%	26%	20%	3.24	3.47	***-0.23***
Public toilets in terms of cleanliness	19%	18%	29%	23%	11%	2.91	3.52	***-0.61***

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. Almost half (45%) said their levels of enjoyment were 'very high'), a 2% drop from 47% in 2023. Almost nine in ten (89%) said their overall enjoyment was 'high' or 'very high' (unchanged from 2023). As a result, an impressive 93% said they were 'likely' (36%) or 'very likely' (57%) to recommend Great Yarmouth to friends and relatives as a tourist destination – this is unchanged from 2023. However, the proportion who were 'very likely' to recommend was higher in 2023.





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 including 'activities', 'feel', 'accessibility' and 'food'.

Child-Friendly Activities
Fireworks and Entertainment
Lots to Do
Seaside and beach
Free Activities
Hotels and Accommodation
Horse Rides
Amusements

Memories
Good for Families
Community Feel
Peaceful
Holiday Feel
Relaxed Atmosphere
Friendly People

Ice Cream
Food Options
Seaside Food

Accessibility
Variety of Shops
Plenty of Seating
Walks and Open Spaces
Cleanliness

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, including transportation, safety, cleanliness and facilities.

Mobility
Parking Issues
Difficult Transportation
Road Quality Issues

Nightlife Issues
Safety Concerns
Homeless and Beggars
Expense and Prices
Immigrants
Overcrowding

Lack of Facilities and Entertainment

Run Down and Dirty Shops
Cleanliness and Litter
Lack of Toilets
Seagull Problem

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

Research Outputs – Key take outs

- Key take outs

About the respondents

- All interviews were conducted in Great Yarmouth area with 61% in Great Yarmouth (Promenade between Pleasure Beach and Waterways, Regent Road
- Most respondents (94%) were visiting for leisure or holidays.
- Family groups were the most usual visiting parties (46%).
- The over 65's were well represented.
- East of England, Midlands and South East regions account for 73% of all visitors.

About day and overnight trips

- The majority of overnight visitors (79%) stayed in Great Yarmouth.
- On average, overnight visitors spent 6.1 nights away from home.
- Caravan/holiday park/chalet accommodation made up half (51%) of all stays in paid accommodation. A quarter (23%) stayed in a hotel.
- Just over half of day visitors (54%) spent all day in the area.
- 84% visitors rated the accommodation as 'good' (32%) or 'very good' (52%). And 74% said it offered 'good' (26%) or 'very good' (48%) value for money.
- Almost two thirds (65%) book their accommodation directly with the provider.

About recent visits

- The vast majority of respondents (95%) had visited Great Yarmouth previously. Almost two thirds (61%) had visited within the last year.
- A large majority of visitors travelled by car (81%).
- Two in five (41%) car users made use of the public car parks. Two in five (39%) found them very easy to find and 20% found them to be very expensive.
- Eating out, shopping and visiting attractions were the top three activities that respondents engaged in during their visits to the area.
- Staying visitors spent an average of £44.39 per 24 hours and £270.78 per overnight trip. Day visitors spent an average of £29.42 per person and trip.
- The majority of those that sought information before travelling used of the Great Yarmouth brochures and website.

About satisfaction and destination development

- The highest satisfaction score was ‘find their way round’ the quality of beach experience and the cleanliness of the beach and coastline.
- The lowest scoring indicators related to the public toilets in terms of cleanliness and availability.
- Almost nine in ten (89%) said their overall enjoyment was ‘high’ or ‘very high’. As a result, an impressive 93% said they were ‘likely’ (36%) or ‘very likely’ (57%) to recommend Great Yarmouth to friends and relatives as a tourist destination
- The best things about Great Yarmouth were grouped by themes and include ‘activities’, ‘feel’, ‘accessibility’ and ‘food’.
- The worst things about Great Yarmouth related to transportation, safety, cleanliness and lack of facilities.

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