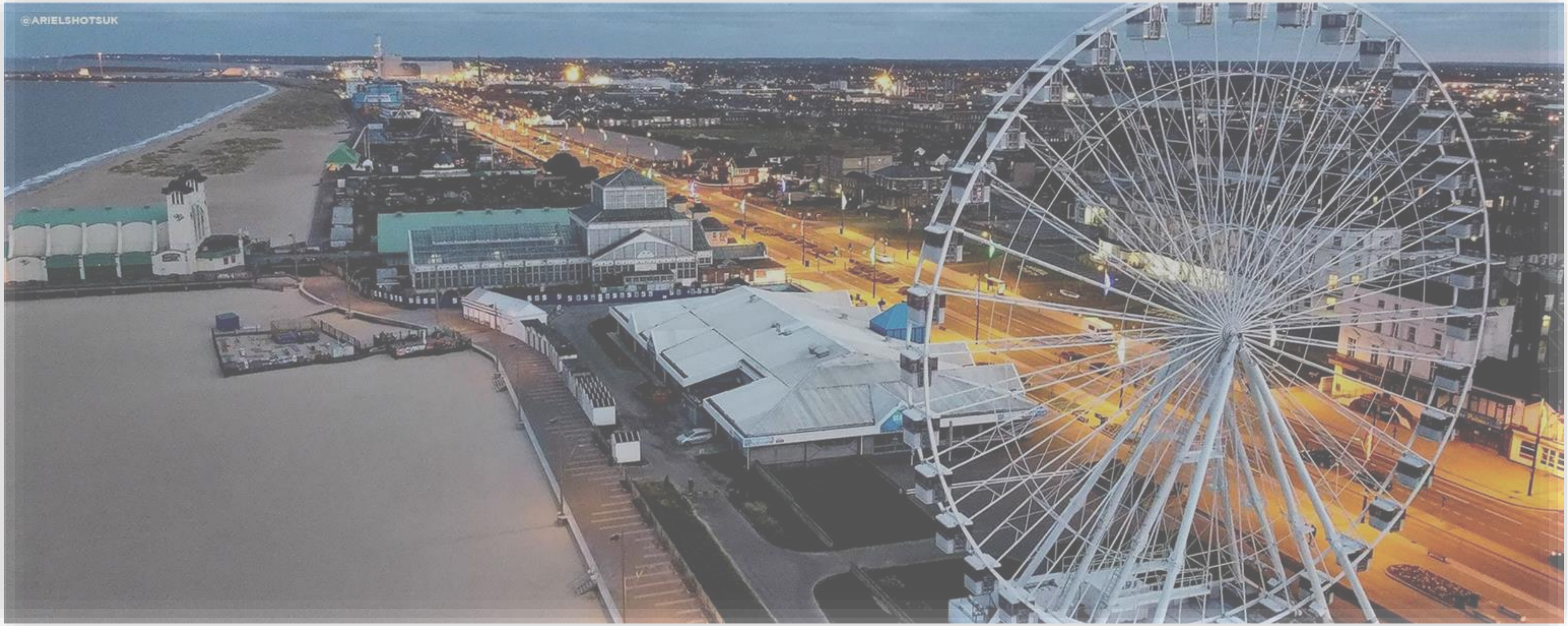
Great Yarmouth Visitor Survey



September 2023

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. Whenever possible, we have compared the results against the 2022 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 2023 until the end of September 2023. 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

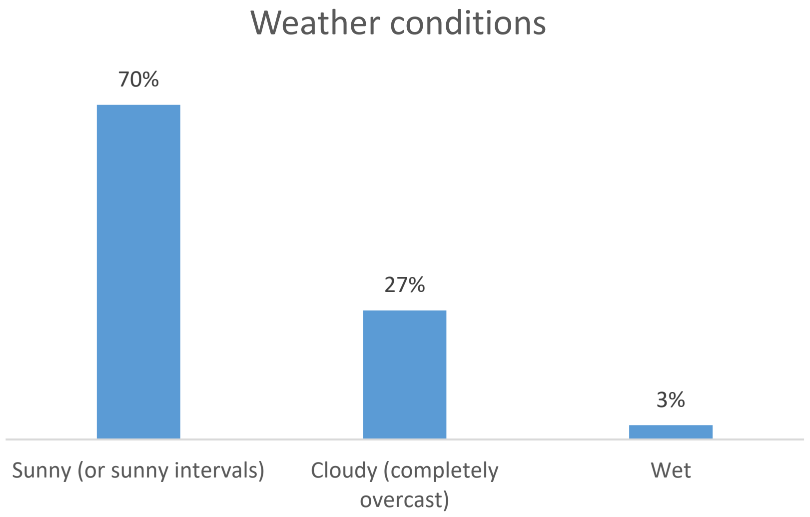
- Please indicate your age
- Please indicate your gender
- Please tell us your home location
- What is your occupation and employment status?
- Your visiting party and the type of trip

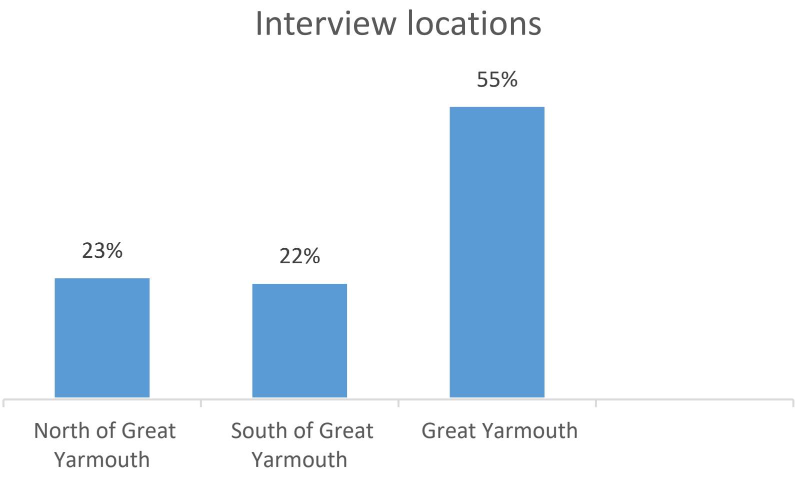
About the respondents – Setting the scene

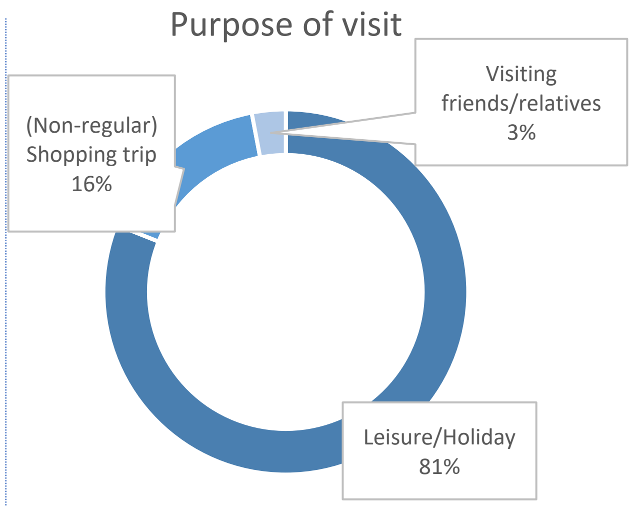
The first section of this report sets the scene in terms of who was included in the survey, where interviews took place and a summary of weather conditions. It also provides an overview of their profile in terms of place of residence, gender, age group, socio-economic status and usual visiting party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

The majority of interviews (55%) were conducted in Great Yarmouth (Promenade between Pleasure Beach and Waterways, Regent Road), 22% in the south of Great Yarmouth (Hopton and Gorleston on Sea -north end of the beach), and 27% 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, 81% were visiting for leisure / holiday purposes, 3% were visiting either friends or family and 16% were on a non-regular shopping trip.



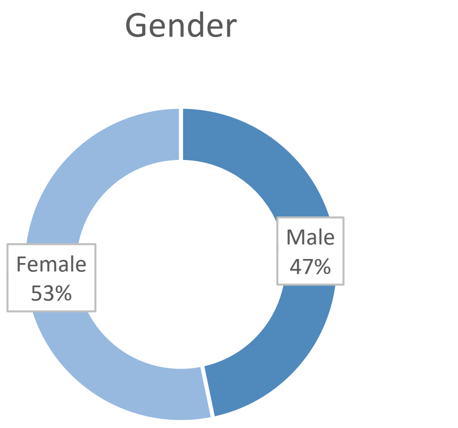


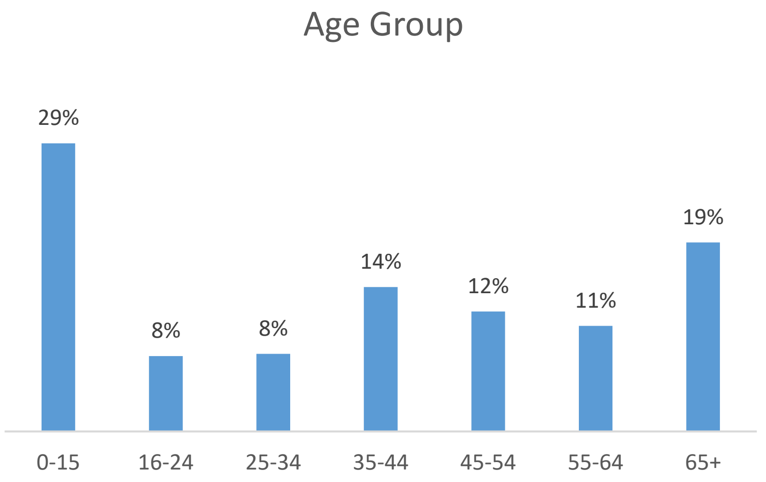


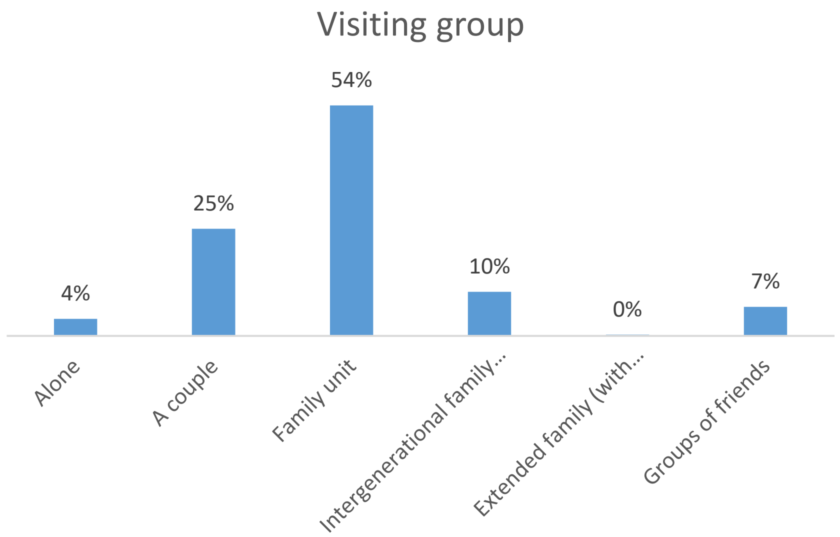
What is your main reason for visiting?

About the respondents

A higher proportion of women (53%) took part in the survey. Children accounted for 29% of the sample and young adults for a further 8%. There was a fairly even split among all adult age groups, although those over 65 held the largest share of 19%. Family units were the most usual visiting group (54%). When extended and intergenerational families were included the total increased to 64%. A quarter (25%) travelled as a couple and 4% visited alone. Finally, 7% of respondents were part of a group of friends.







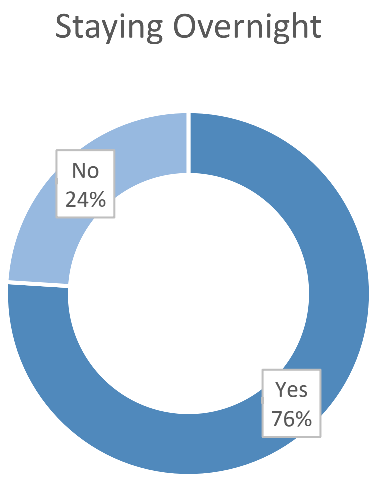
How many people in your immediate family are male and female and which age categories do they fall into?
How would you describe your visiting party?

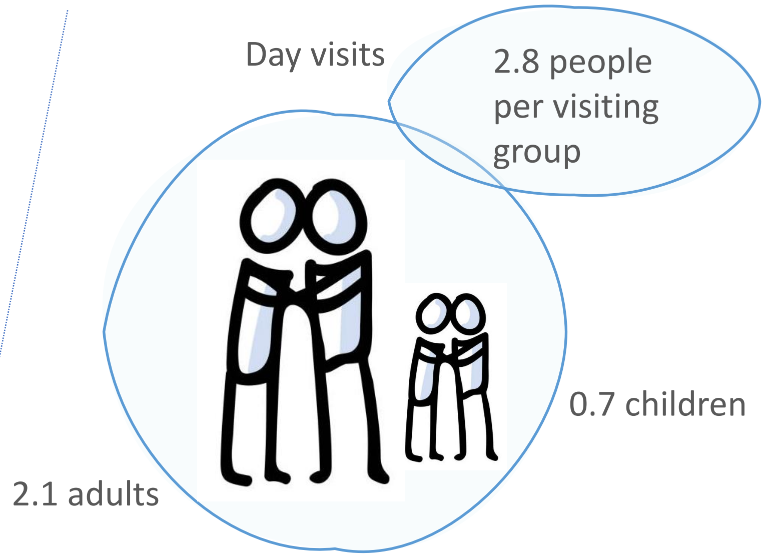
About the respondents

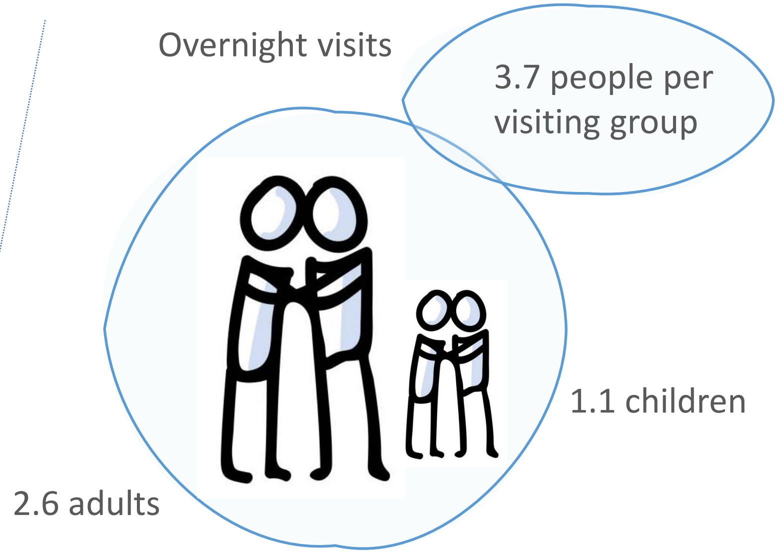
Overnight stays

The sample included a larger proportion of visitors staying overnight in the area (76%) this is slightly higher than 2022 when 74% were on an overnight visit. On average, visitors staying overnight visited in groups of 3.7 people (2.6 adults and 1.1 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 (2.1 adults and 0.7 children per group). The visiting group figures per group size, adults and children remained similar although smaller than for both day visits and overnight stays for 2023 from 2022 results.



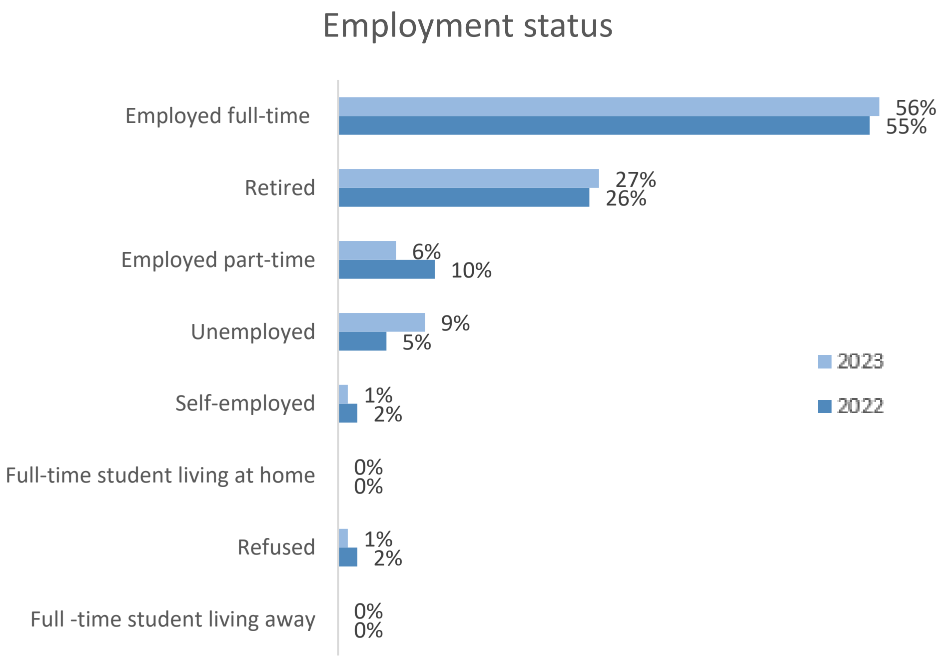


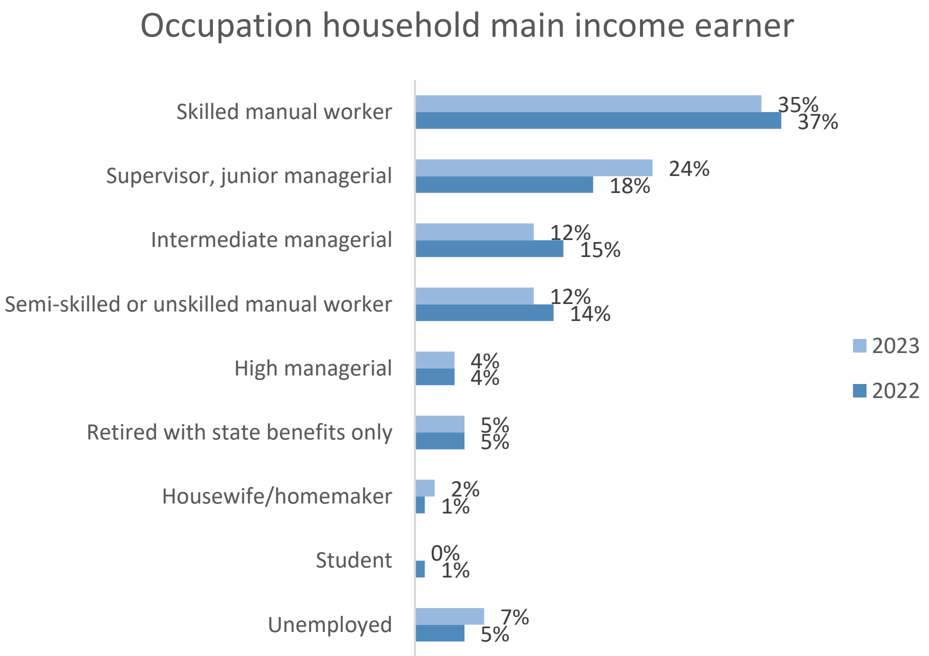


Are you staying overnight during your trip?
How many people in your immediate family are male and female and which age categories do they fall into?

About the respondents

Slightly more than half (56%) were in full-time employment (up from 55% in 2022) and a further 27% were retired (up from 26% in 2022). In terms of the key occupations, skilled manual workers (35%) down from 37% in 2022, junior managerial (24%), up from 18% in 2022, and intermediate managerial jobs (12%) down from 15% in 2022 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

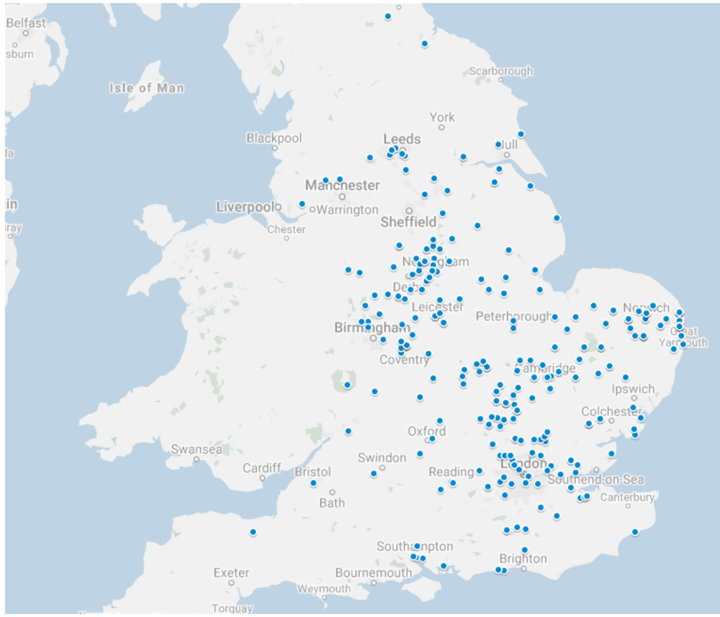
East of England, East and West Midlands regions account for 72% of all visitors, unchanged since 2022, although the proportion of visitors from West Midlands has increased slightly. Day visitors were mainly from the East of England (90%). Overnight visitors originate primarily from within the East of England, East Midlands and West Midlands. Key areas within these regions include Essex, Nottinghamshire, Derbyshire, Kent, Bedfordshire, Hertfordshire, Cambridgeshire and Lincolnshire.

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%

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%



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

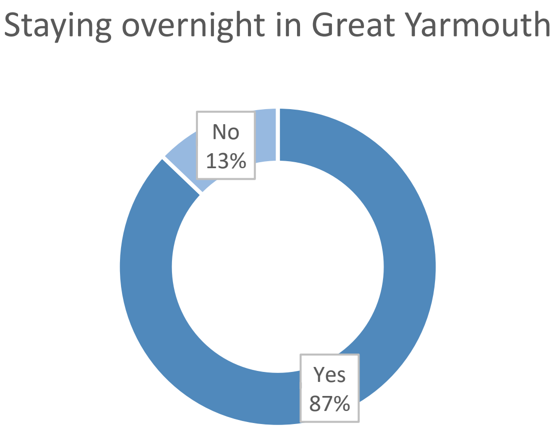
- Accommodation (locations, expenditure, satisfaction ratings)
- Length of stay (number of hours / number of nights).

About the respondents - About day and overnight trips

The majority of overnight visitors (87%) 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 as well as Lowestoft, Kessingland, Wroxham, Norwich and King's Lynn further away.

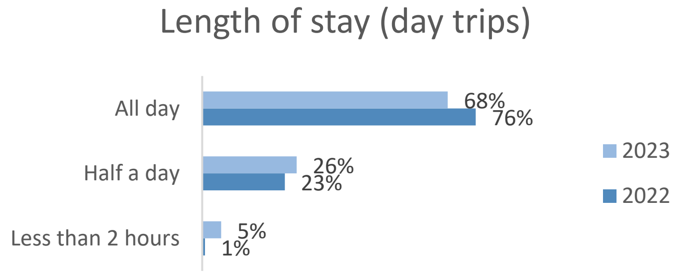
On average, overnight visitors spent 5.9 nights away from home – a decrease from 2022 but not as low as 2021. The number who stay all day in Great Yarmouth as fallen from 76% in 2022 to 68% in 2023 with those staying less than two hours increasing from 1% to 5%.

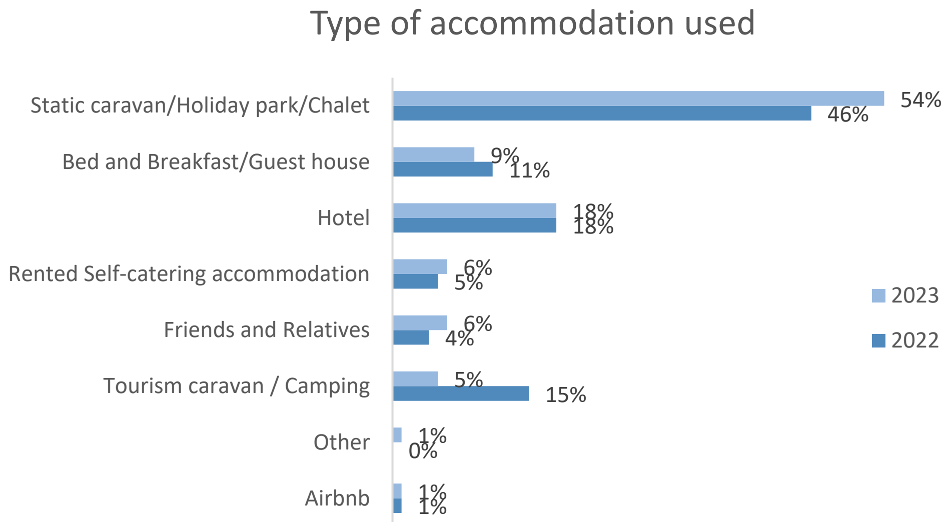
Self-catering accommodation made almost 70% of all stays in paid accommodation. Static caravans, holiday parks and chalets accounted for 54% of all accommodation used, a rise of 8% over 2022. Touring caravans and camping was down to 5% from 15% in 2022. Cottages and flats accounted for 6% (up 1%). Just over a quarter (27%) stayed in serviced accommodation, including hotels (18%) and B&B guesthouses (9%).



Length of stay (nights)

2023 – 5.9 nights per trip
2022 – 6.1 nights per trip





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 £44.86 per person, per 24 hours (slightly down from £46.24 in 2022). Accommodation and transport accounted for the highest proportion of the expenditure. The average overnight visit lasted 5.9 nights, meaning that the average expenditure per person and per overnight trip was £264.68 (down from £281.81 in 2022).

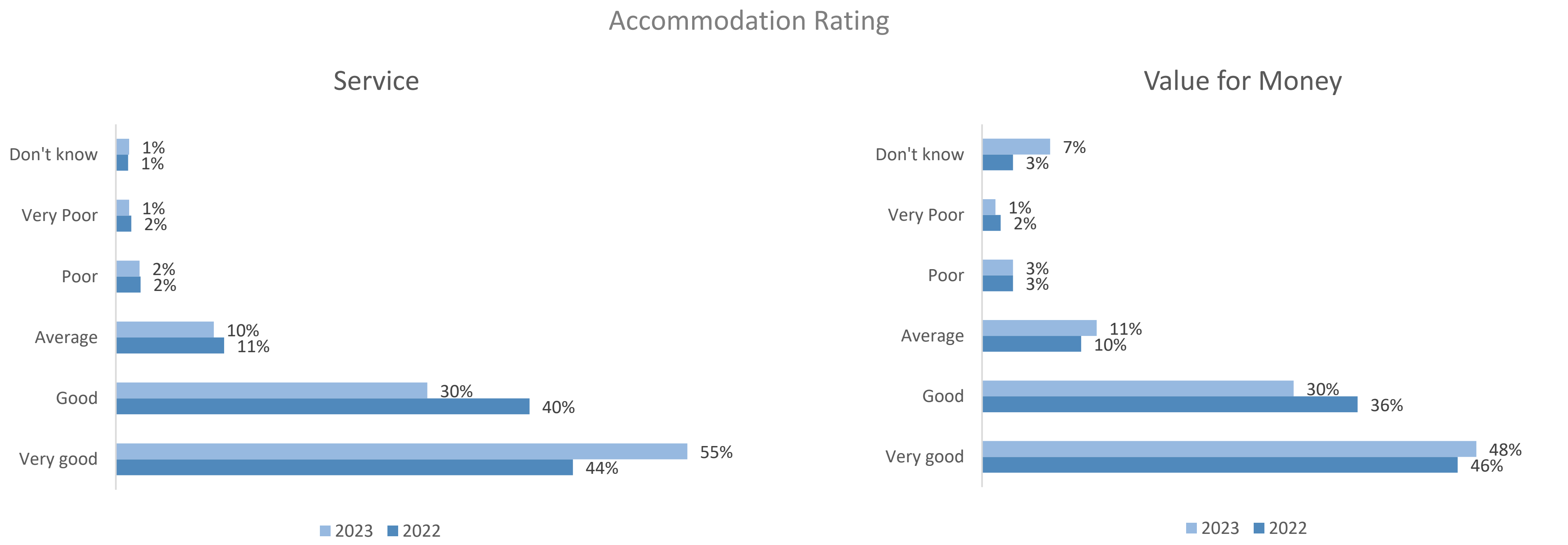
Day visitors from home spent an average of around £26.56 again down on the 2022 figure of £30.74 per person per day in the area, with eating out accounting for the highest proportion of expenditure.

Spend per person	Overnight Trip	Day trip
Accommodation	£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

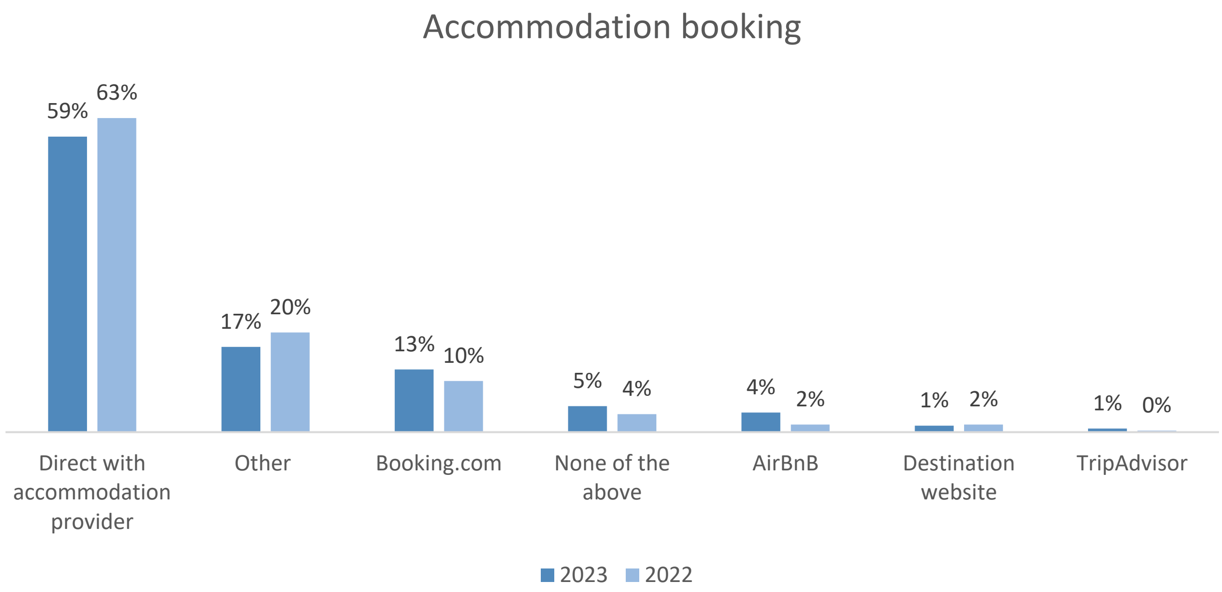
Overall, visitors rated their accommodation highly, with those that rating the service received as Good or Very good staying at a similar level to last year (up from 84% to 85%) although those that rated the accommodation 'very good' rose significantly from 44% to 55%. Those that believed that their accommodation offered good or 'very good' value for money fell from 82% to 78%, although those that rated 'very good' rose from 46% to 48%.



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 (59%) booked their accommodation directly with the provider (down from 63% in 2022). The number that used an online travel agent (OTA) such as Booking.com, rose to 13% and a further 17% used other methods, including other OTAs, coach trips, caravan clubs and sites and those that stayed with friends or relatives.



Other methods:

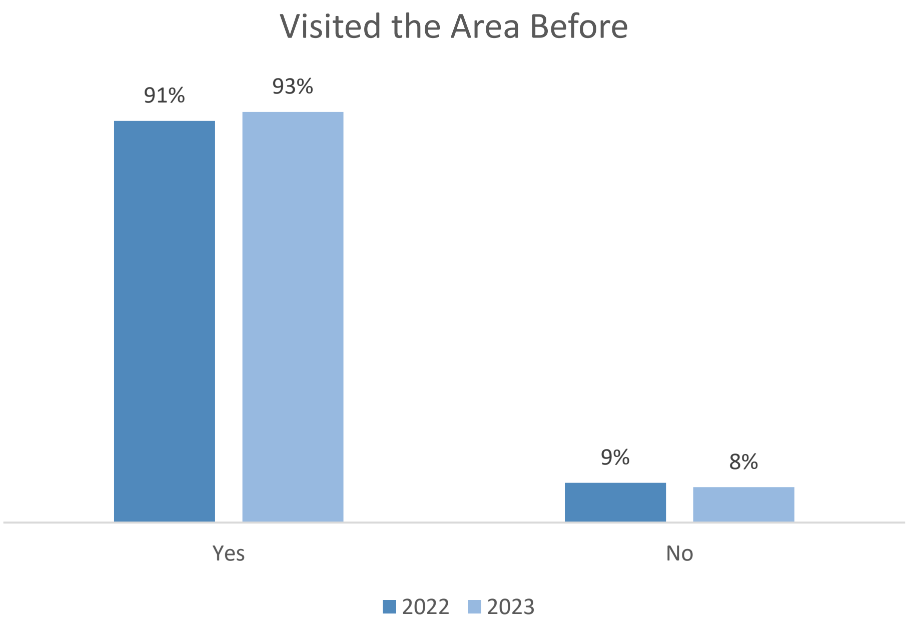
- OTAs
- Coach company
- Caravan site
- Friends and relatives

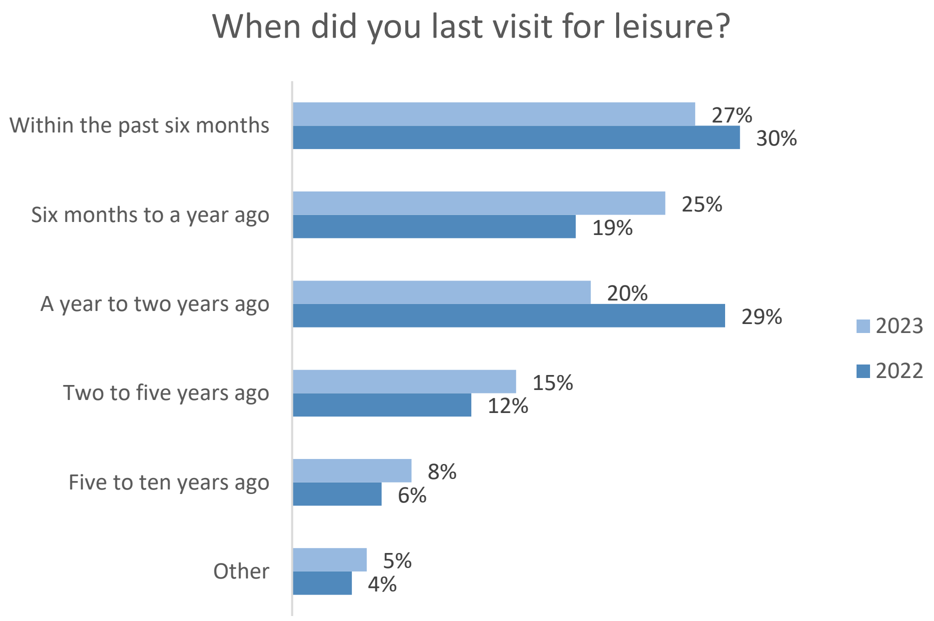
Research Outputs – About recent visits

- 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 2023 (93% up from 91% in 2022). The number that had visited in the past year (past six months and six months to a year) rose in 2023 to 52%, up from 49% in 2022, while those that had visited a year to two years ago fell from 29% in 2022 to 20% in 2023.

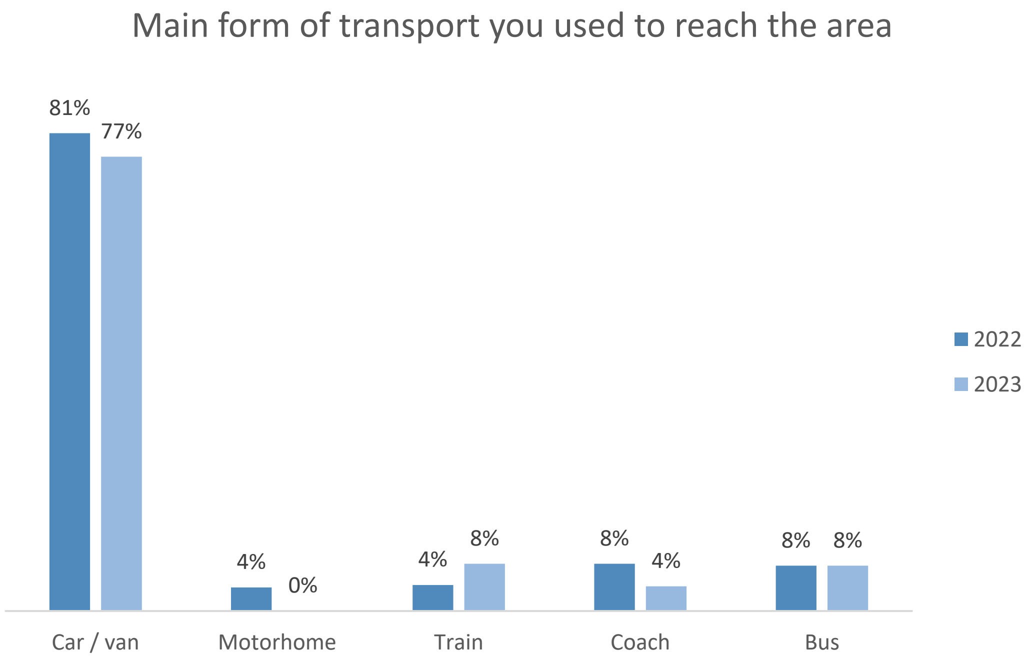




Have you visited the area before? When did you last visit for leisure?

Recent visit to Great Yarmouth - Transport

While the large majority of visitors still visit by car this has been falling over the past two years, from 87% in 2021, to 81% in 2022 and 77% in 2023. The difference was noted by an increase in 2023 of those that had travelled by train (up from 4% in 2022 to 8% in 2023).



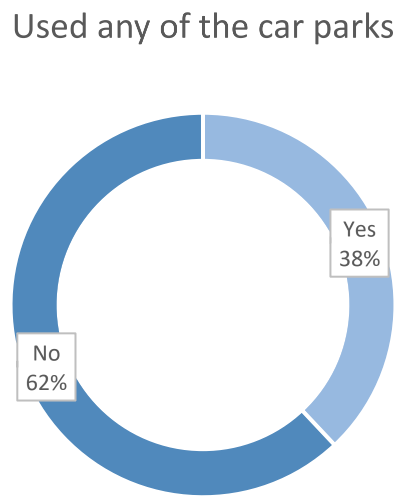
What was the main form of transport you used to reach Great Yarmouth?

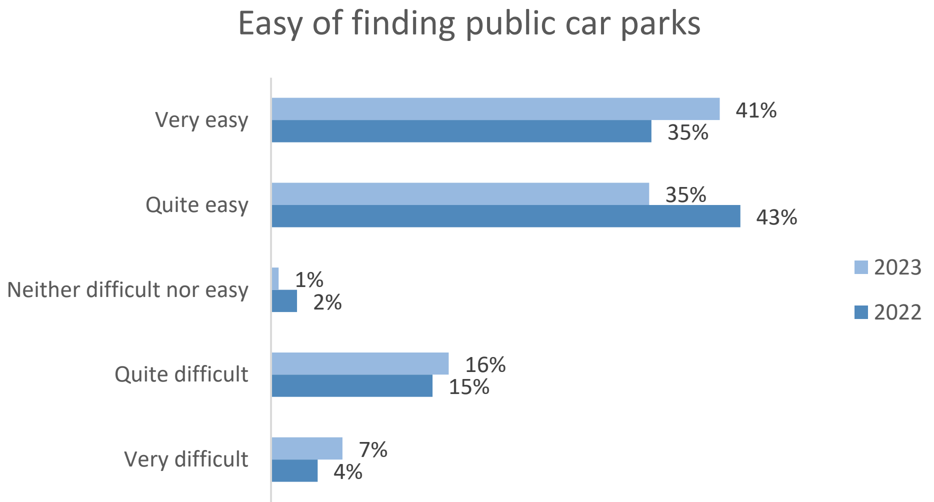
Recent visit to Great Yarmouth – Car parking

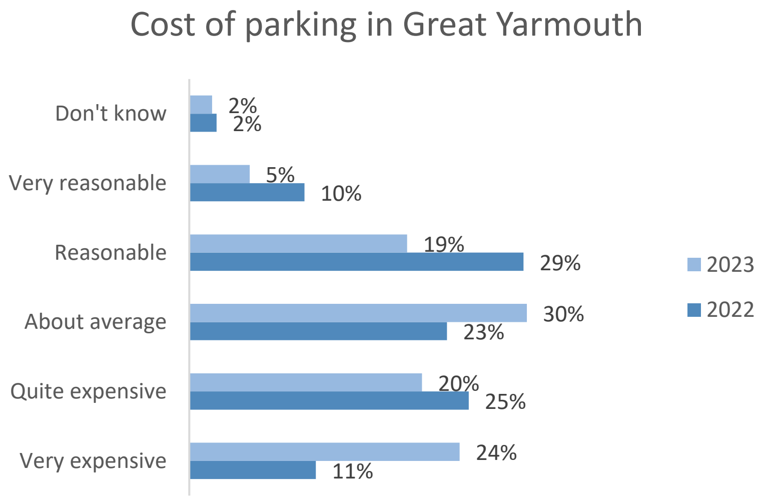
The number using public car parks fell from 46% in 2022 to 38% in 2023.

Over three quarters said that finding public car parks was either 'quite easy' (35% down from 43% in 2022) or 'very easy' (up to 41% from 35% in 2022). A quarter (23%) found it 'quite difficult' (16%) or 'very difficult' (7%), both up on 2022 figures.

Almost half considered the cost of parking to be 'quite' (20%) or 'very' (24%) expensive, the latter doubling since 2022 (up from 11%). However, almost one third (30% up from 23% in 2022) thought it was 'about average'. Only 19%, (down from 29% in 2022) said it was 'reasonable' and 5% (down from 10%) found it 'very reasonable'.







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?

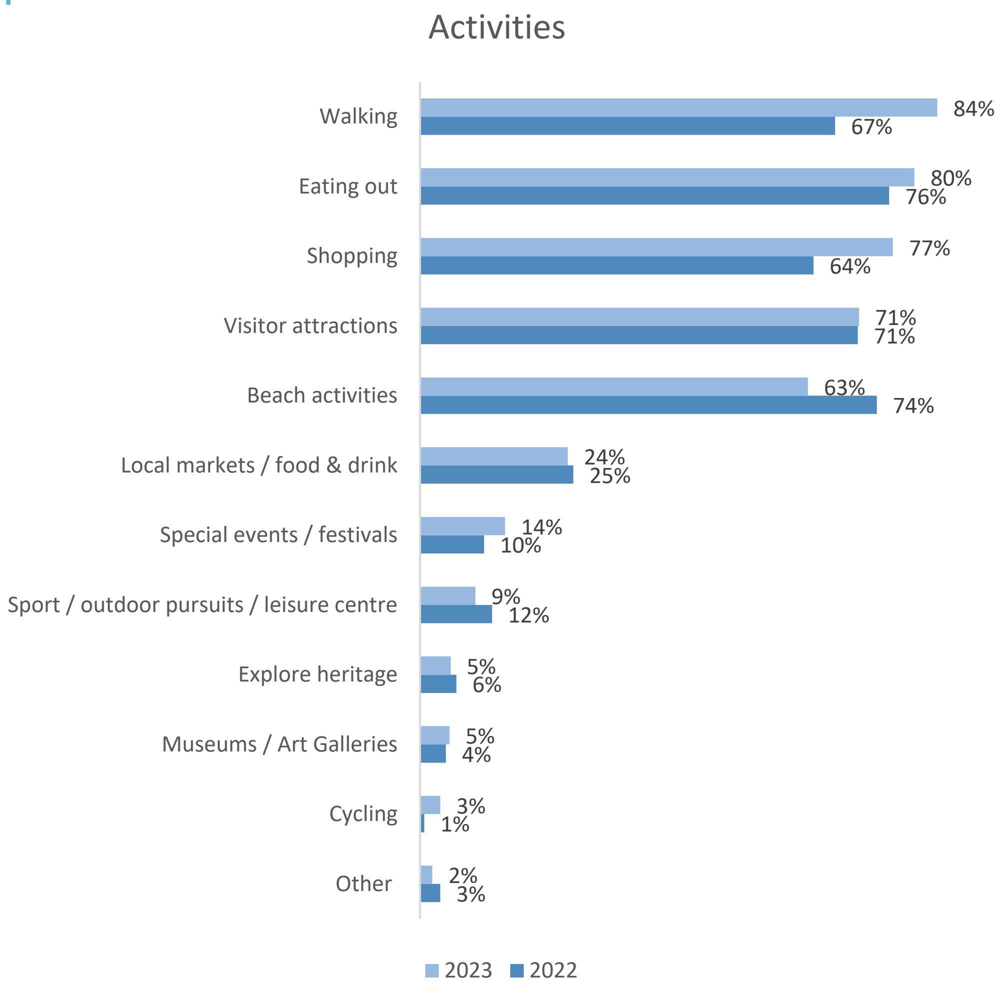
Recent visit to Great Yarmouth – Key activities undertaken

Walking, eating out and shopping were the top three activities that respondents engaged in during their visits to the area.

Walking rose in popularity with 84% saying that they had taken part in this activity, a rise from 67% in 2022. Four in five respondents (80%) ate out, a 4% increase over the previous year.

Three quarters (77%) of visitors went shopping (77%) up from 64% in 2022. The proportion of respondents that visited an attractions was unchanged since 2022 (71%). However, beach activities fell from 74% to 63% perhaps as a result of the subdued summer weather.

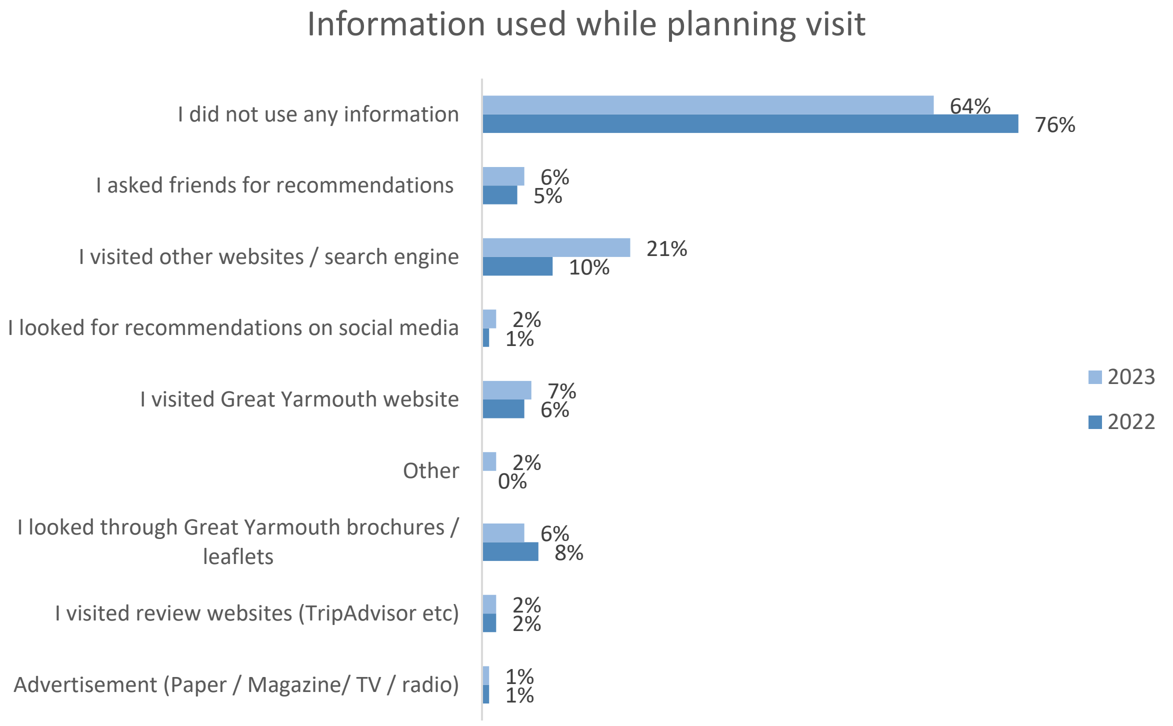
Smaller proportions of respondents took part in other activities, including visits to local markets (24%), attending special events (14%), outdoor activities (9%), and visiting heritage sites (5%), museums and art galleries (5%).



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

Recent visit to Great Yarmouth – Information

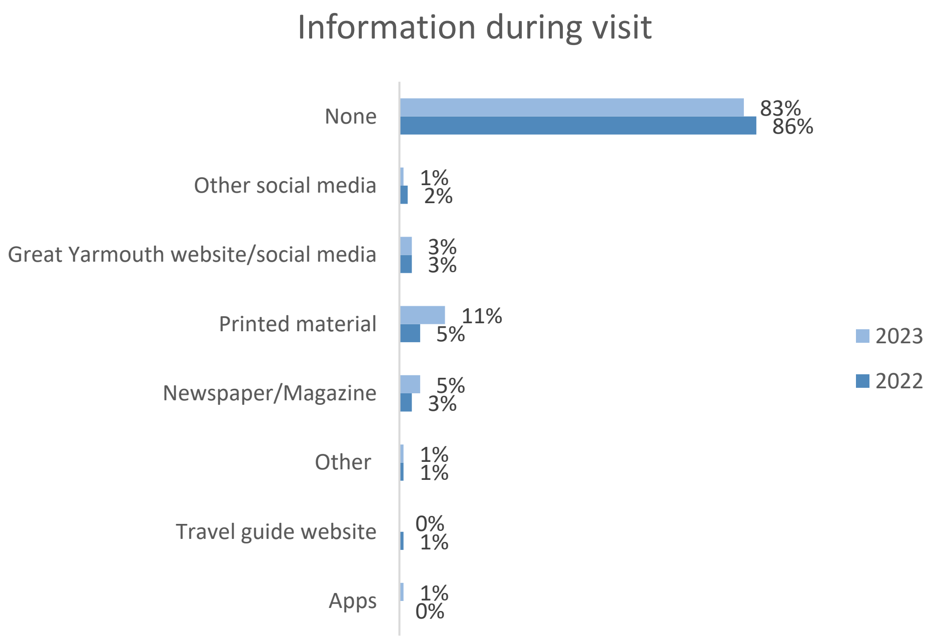
Respondents were asked if they had used any information sources to find out about Great Yarmouth whilst planning their trip and if so, which types. The percentage that did not use any information fell from over three quarters (76%) to below two thirds (64%.). The increase of those that sought information before travelling can be attributed mostly to the use of websites and search engine, which doubled from 10% in 2022 to 21% in 2023.



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 (83%) didn't make use of any information. Those who did cited the internet and social media (including Visit Great Yarmouth).



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' (4.73). Other high scorers were the quality of beach experience (4.68) and the cleanliness of the beach and coastline (4.63).

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

Public toilet, both cleanliness (3.52) and availability (3.47) were the lowest scoring. Shopping was also in the lower part of the table (3.94).

The scores that rose the most from 2022 were for access – both prams and buggies (a rise of 0.29) and for those with a disability (a rise of 0.23). Overall impressions were marginally lower than in 2022.

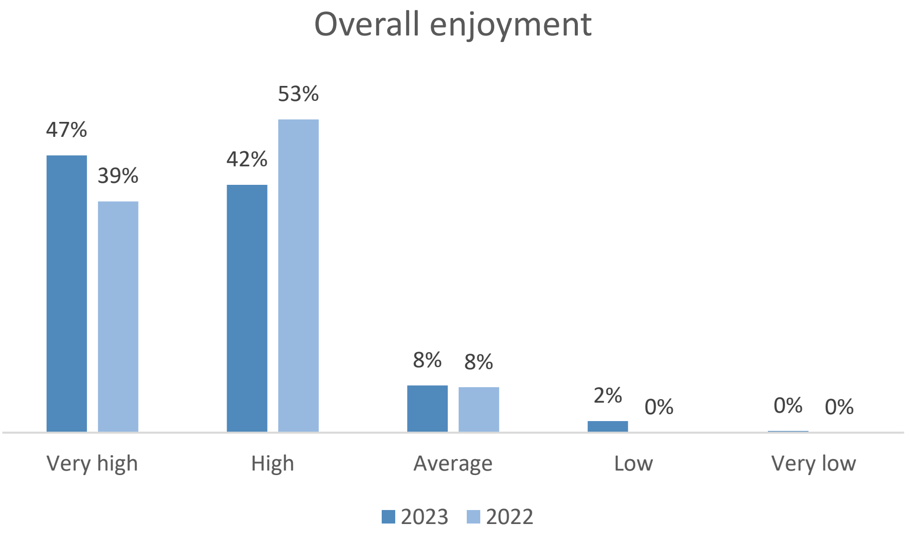
Satisfaction – Key attributes

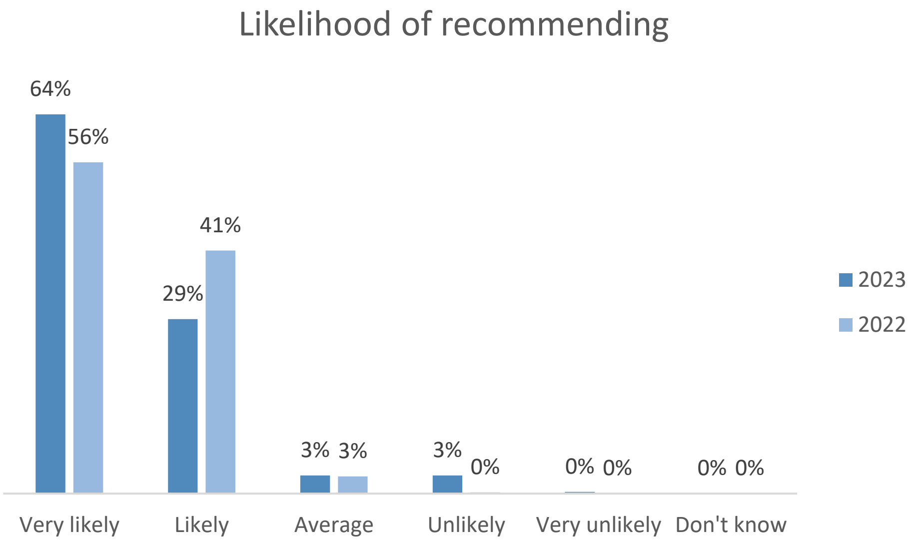
Attributes	Very poor	Poor	Average	Good	Very good	Average score	Score 2022	Variation
Ease of finding your way around	0%	0%	2%	22%	75%	**4.73**	4.72	0.01
Quality of beach experience	0%	1%	2%	27%	71%	**4.68**	4.66	0.02
Beach/Coastline Cleanliness	0%	0%	5%	25%	69%	**4.63**	4.64	-0.01
Overall impression (feeling of welcome)	0%	0%	3%	31%	65%	**4.61**	4.71	***-0.10***
Overall impression (general atmosphere)	0%	1%	4%	31%	65%	**4.60**	4.69	***-0.09***
Maps and Information Boards	1%	5%	8%	23%	63%	**4.43**	4.38	0.05
Watersports/outdoor recreation (e.g. cycling)	1%	2%	8%	40%	50%	**4.37**	4.36	0.01
Places to eat and drink	0%	2%	12%	38%	49%	**4.34**	4.32	0.02
Attractions	0%	1%	9%	47%	43%	**4.32**	4.4	-0.08
History & Heritage	0%	1%	10%	44%	44%	**4.32**	4.24	0.08
Pedestrian signposting	0%	1%	8%	52%	39%	**4.28**	4.12	0.16
Prams/buggies access	1%	6%	11%	32%	50%	**4.26**	3.97	**0.29**
Arts/Culture	1%	4%	15%	44%	37%	**4.15**	4.01	0.14
Disabled accessibility	1%	10%	11%	35%	43%	**4.10**	3.87	**0.23**
Traffic levels/congestion	1%	3%	15%	56%	25%	**4.01**	3.95	0.06
Shops	1%	7%	23%	39%	31%	**3.94**	3.91	0.03
Public toilets in terms of cleanliness	7%	11%	25%	36%	21%	**3.52**	3.35	**0.17**
Public toilets in terms of availability	9%	15%	22%	29%	25%	**3.47**	3.47	0.00

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 (47% said their levels of enjoyment were 'very high') a significant rise from 39% in 2022. Almost nine in ten (89%) said their overall enjoyment was 'high' or 'very high'. As a result, an impressive 93% said they were 'likely' (29%) or 'very likely' (64%) to recommend Great Yarmouth to friends and relatives as a tourist destination – this is below the 97% from 2021. 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. 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 – particularly chips. These themes have not changed much since 2022 – they have largely remained the same.

The beach / coastline
Traditional
seaside feel

Free entertainment
Amusement Parks
Arcades
Circus
Pleasure Beach

Flat
Walking

Restaurants
Fish & chips

Great atmosphere
Flat ground
Friendly people
Value for money

Range of activities
Plenty for kids
Variety of things to do
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' which were the most mentioned last years received less complaints in 2023.. Other mentions were 'anti social behaviour' and 'drugs'. 'Toilets' were mentioned often as being dirty and not enough of them. A lack of seating got more mentions than previously as did the price of food and drink.

Drugs
Night-time drunks
Anti-social behaviour

Not enough seatings
Price of food & drinks

Toilets – dirty and not enough

Litter / poor cleanliness
Messy especially back streets

Seagulls/birds

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 other infrastructure, respondents often replied that most areas of needed updating and tidying up. – more shops, more events and shows and more and better toilets. More car parking dropped of the list since 2022. The Winter Gardens and Victoria Arcade received a significant number of mentions in terms of restoration and a need for improvement.

Town feels dated and needs updating

More shops, events and shows, more and better toilet facilities

More entertainment

More restaurants

Winter Gardens

Victoria Arcade

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 – Changing Plans

- Did you originally plan to go abroad this year?
- Why did your holiday plans change?

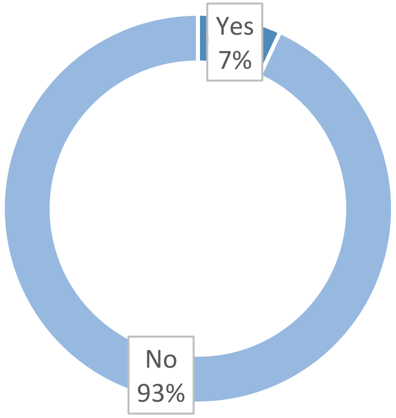
New questions for 2023

About half (49%) feel the effects of the pandemic will be unchanged and a further 47% thing that the worst has passed, and it will be better from now on.

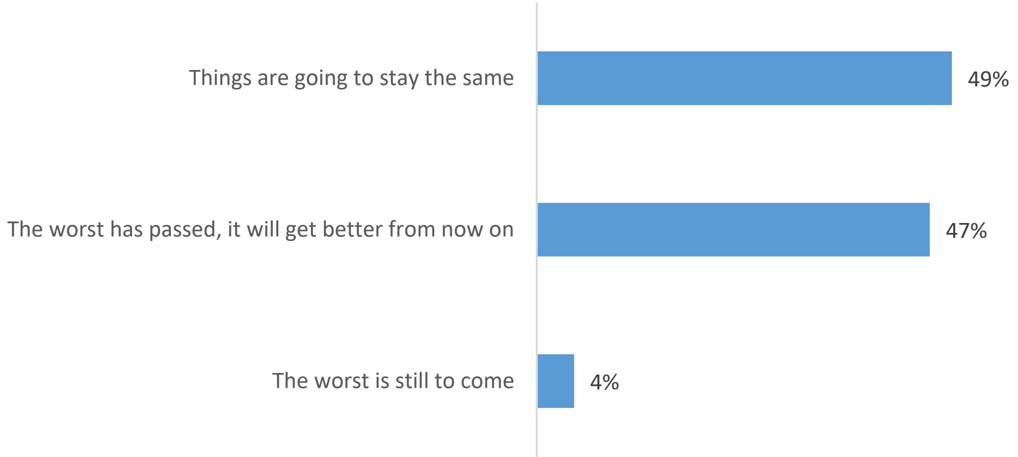
Most respondents (93%) said that they were not originally planning to go abroad this year.

Of those that changed their travel plans and decided not to go abroad, cost was the most important factor (62%). Concerns over Covid have dropped to under 10% of respondents.

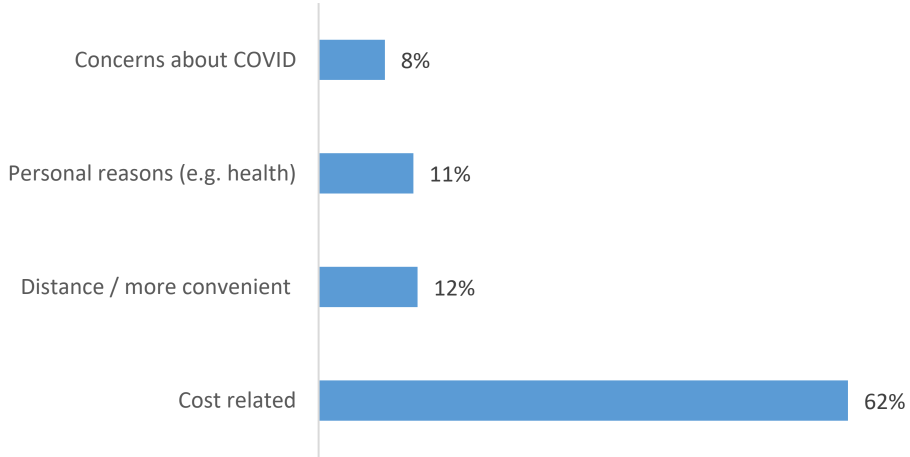
Did you originally plan to go abroad this year?



Opinions on the pandemic

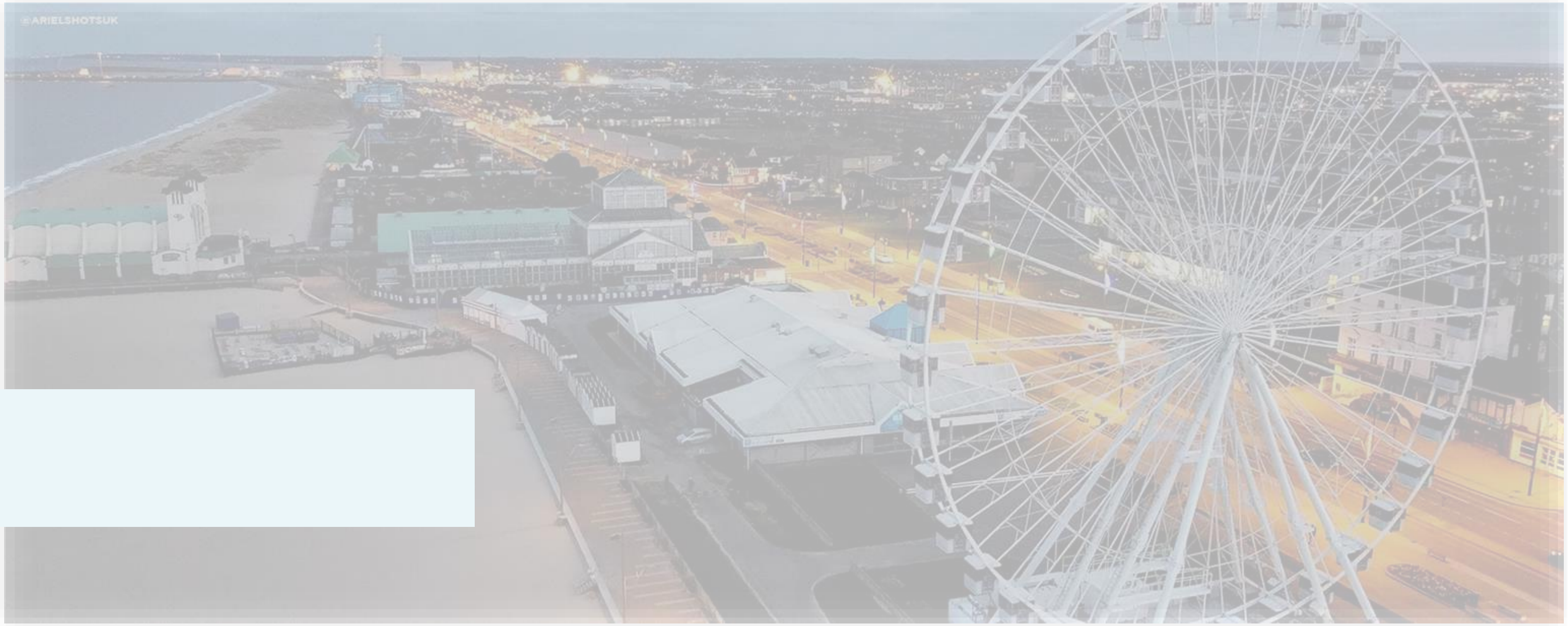


Why did your holiday plans change?



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

- All interviews were conducted in Great Yarmouth area with 55% in Great Yarmouth (Promenade between Pleasure Beach and Waterways, Regent Road
- Most respondents (81%) were visiting for leisure or holidays.
- Family groups were the most usual visiting parties (54%).
- The over 65's were well represented.
- East of England, Midlands and South East regions account for 70% of all visitors.

About day and overnight trips

- The majority of overnight visitors (87%) stayed in Great Yarmouth.
- On average, overnight visitors spent 5.9 nights away from home.
- Caravan/holiday park/chalet accommodation made up half (54%) of all stays in paid accommodation. 18% stayed in a hotel.
- Two thirds of day visitors (68%) spent all day in the area.
- Overall, 85% visitors rated their accommodation as 'good' (30%) or 'very good' (55%). And 78% said value for money was 'good' (30%) or 'very good' (48%).
- Almost two thirds (59%) book their accommodation directly with the provider.

About recent visits

- The vast majority of respondents (93%) had visited Great Yarmouth previously. More than two in five (52%) had visited within the last year.
- A large majority of visitors travelled by car (77%).
- Just under two in five car users (38%) made use of the public parking areas. Two in five (41%) found them very easy to find and a quarter (24%) found them to be very expensive.
- Walking, eating out and shopping were the top three activities that respondents engaged in during their visits to the area.
- Staying visitors spent an average of £34.03 per 24 hours and £200.80 per overnight trip. Day visitors spent an average of £26.56 per person and trip.
- Recommendations, search engines, websites (including Visit Great Yarmouth) and social media were popular sources of information when planning a trip.

About satisfaction and destination development

- The highest satisfaction scores were related to the ease of finding their way round, the quality of the beach experience, and the levels of cleanliness of the beach and the 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’ (29%) or ‘very likely’ (64%) to recommend Great Yarmouth to friends and relatives as a tourist destination
- 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 ‘dirty toilets’ followed by ‘anti social behaviour’, the area being ‘run down’ and ‘costs’.
- A potential development of new attractions or infrastructure generated opinions relating to shopping and entertainment, with Winter Gardens and Victoria Arcade often mentioned as an area of improvement.

Changing trip plans

- Only 7% had originally planned to go abroad this year.
- Of these plans the majority were changed due to costs, Covid-19 only accounted for less than 10% of changes.

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