The 14,018 actual jobs supported by visitor spending in N & W Norfolk accounts for 17.5% of all jobs in the two District Council areas. There is no reliable data on the number of seasonal or casual visitors for the area.

Visitors and job contributions to different features of the area

Using the data on people's motivations for visiting the area it is possible to estimate spending attributable to different features. It is estimated that:

- Visitors to the six sites spend £5.3 million on the day of their visit and an estimated £2.45 million spend in the local economy supporting 52 direct and indirect FTE jobs.
- Visitors to Cley Marshes spend £1.81 million spend in the local economy supporting 39 direct and indirect FTE jobs.
- Visitors to Cley Marshes contribute just under 3,000 days of work per year on the sites.
- The RSPB and volunteers make a valuable contribution to the local economy, including £137,000 spent on local goods and services.

Economic Impact of Nature Reserves

A survey of nature reserves in the area looked at sites managed by the RSPB, English Nature, Norfolk Wildlife Trust and the National Trust. This examined their expenditure in the local economy, direct employment on reserves and use of volunteers.

Nature reserves make a valuable contribution to the local economy, including:

- Direct employment of 35 actual jobs (26.5 FTE jobs)
- £137,000 spent on local goods and services
- 3.26 billion FTE jobs

Economic Impact of Nature Reserves

Volunteers contribute on all sites over the last five years. In the next three years, employment is expected to increase at one site and remain static at the others.

Volunteers contribute on all sites over the last five years. In the next three years, employment is expected to increase at one site and remain static at the others.

2.45m spend in the local economy supporting 52 direct and indirect FTE jobs.

Businesses interviewed

The businesses that interviewees were interviewed to ascertain their views on the value of their business to their local community. Such a business has been defined as one that is not primarily reliant on tourism. This is to ensure the interview is not constrained by seasonal fluctuations and possible changes in attitude.

Summary of visits, expenditure and jobs supported

<table>
<thead>
<tr>
<th>BUSINESS CASE STUDIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors interviewed</td>
</tr>
<tr>
<td>Business</td>
</tr>
<tr>
<td>George Baker</td>
</tr>
<tr>
<td>The Holy Angels</td>
</tr>
<tr>
<td>Made to Clay</td>
</tr>
<tr>
<td>Made in Cley</td>
</tr>
<tr>
<td>Le Strange Arms Hotel</td>
</tr>
<tr>
<td>The Unofficial Inn</td>
</tr>
<tr>
<td>Holkham Pottery</td>
</tr>
<tr>
<td>Holkham Nursery</td>
</tr>
<tr>
<td>The Lifeboat Inn</td>
</tr>
<tr>
<td>The Le Strange Arms</td>
</tr>
<tr>
<td>The Searles Family</td>
</tr>
<tr>
<td>Made in Cley</td>
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<tr>
<td>The Lifeboat Inn</td>
</tr>
</tbody>
</table>

The economic benefits of a high quality environment

The potential of wildlife tourism

Striking a balance for the future

For further information, or a copy of the full report please contact Paul Lewis at the address below.

RSPB East Anglia Office, Stalham House, 68 Thorpe Road, Norwich, Norfolk NR1 1UD
Tel: 01603 661662   E-mail: paul.lewis@rspb.org.uk   Web: www.rspb.org.uk

Registered Charity No. 207076

For information of this kind is likely to spoil what they have come to do in the first place, and we would lose that feeling of ‘holidays without stress’.

Michael Lovett

“Conservation has an important part to play in the future of the area, providing local people and visitors with a quality environment. Wildlife tourism, especially birdwatching, also attracts the income into the double-walled market.”

Matthew Beck, Pinewoods Holiday Park

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MATTHEW BECK, PINEWOODS HOLIDAY PARK
Valuing NORFOLK’S COAST

Six sites were chosen for the visitor survey to provide a geographical spread and to be representative of visitors motivated by the area’s wildlife and environment.

Reasons for Visiting

Influenced decisions %
Main reasons %

Birds/wildlife 50 34
Scenery/Landscape 47 18
Peak/Transport 40 10
Visitor Services 22 10
Traditional villages 20 9
Accommodation 16 7
Watery Activities 16 6
Visitor facilities/services 13 6
Personal recommendation 13 6
Newspaper/hap, article 10 5
Other 8 3
None of above 8 3

This report focuses on the economic value of tourism associated with the coastal wildlife and environment of the Norfolk coast – see map for study area. It is based on a visitor survey of 10,000 visitors across six sites, which includes participation by 34 per cent of respondents identifying them as their main reason for visiting. Other important areas were scenery, landscape, and tranquility.

Birds and wildlife were the biggest attraction for visitors to the survey sites, with 34 per cent of parties identifying with them as their main reason for visiting. Other important reasons were scenery, landscape, and tranquility.

Visitors to each site were asked about the importance of the site itself in influencing their decision to visit the area. In each case 30-40 per cent of visitors identified the site as the main reason for their visit. Cley and Titchwell visitors were more likely to have planned to visit these sites before matching the area than visitors to the other four sites, perhaps on account of their national reputation as leading nature reserves.

Activities of Visitors to Survey Sites

The most popular activities of visitors were 'walking', 'birdwatching', and 'wildlife spotting'. These activities account for more than 50% of visitors.

The economic impact of the visitor survey is summarised below. Visitor spending, supports further jobs. The money spent locally, by employees whose jobs directly or indirectly depend on tourism, is an important component of the visitor economy. These businesses may be local or national, and their products and services range from participation in the local tourism industry, and support additional jobs when buying goods and services. In turn this can support jobs in other sectors such as agriculture, fishing, retail, and industry.

Visitor Expenditure

Interviews were conducted at each of the six sites to determine the number of visitors and their expenditure. The expenditure was then used to estimate the total expenditure for the duration of their stay.

Visitor Expenditures

Average daily spend and average trip spend for each site are as follows:

<table>
<thead>
<tr>
<th>Site</th>
<th>Average Daily Spend (£)</th>
<th>Average Trip Spend (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blakeney</td>
<td>20.6</td>
<td>146.5</td>
</tr>
<tr>
<td>Cley</td>
<td>19.6</td>
<td>151.8</td>
</tr>
<tr>
<td>Titchwell</td>
<td>17.5</td>
<td>122.4</td>
</tr>
<tr>
<td>Burnham</td>
<td>16.8</td>
<td>118.5</td>
</tr>
<tr>
<td>Holkham</td>
<td>14.8</td>
<td>114.6</td>
</tr>
<tr>
<td>Snettisham</td>
<td>11.8</td>
<td>91.4</td>
</tr>
</tbody>
</table>

While tourism provides jobs and incomes, and helps sustain the viability of local shops and services, it also imposes costs on existing residents, which are poorly paid and seasonal, and demand for holiday homes in pushing house prices beyond the reach of most local people.

The challenge ahead is effectively summarised in the East of England Tourism Board’s strategy for 2000-2010. It is not so much ‘sustainable’ tourism which is needed as tourism which makes, plus the outstanding wildlife of the Wash and north Norfolk coast is acknowledged by its designation as an Area of Outstanding Natural Beauty – see map for study area. It is based on a visitor survey of 10,000 visitors across six sites, which includes participation by 34 per cent of respondents identifying with them as their main reason for visiting. Other important reasons were scenery, landscape, and tranquility.

Additional turnover from visitor spending supports jobs primarily in the accommodation, catering, attractions, and retail sectors, but also in other sectors including tourism and agriculture. This research provides estimates of the volume and value of tourism in the Norfolk coast, which provides estimates of the volume and value of tourism in the

KEY FINDINGS INCLUDE

Survey sites were carried out in August and October 1999 to assess both seasons of the peak season. Questionnaires were used to assess respondents about the sites and over 150 interviews from these area plus local businesses and questionnaires were completed with representatives on behalf of visitors.

NORFOLK’S COAST

environment - wildlife - tourism - quality of life

People have long been attracted to the Norfolk coast by its special character, landscape and wildlife. Artists and writers have been inspired by its beauty while Cleb Marshes and Blakeney Point have been renowned for their bird life for more than 150 years. The scenic richness and variety of much of the coast and hinterland is acknowledged by its designation as an Area of Outstanding Natural Beauty – see map for study area. It is based on a visitor survey of 10,000 visitors across six sites, which includes participation by 34 per cent of respondents identifying with them as their main reason for visiting. Other important reasons were scenery, landscape, and tranquility.

The stunning wildlife of the Wash and north Norfolk coast is recognised by a host of designations and many nature reserves. No other area can match this coastline for its mass and variety of wildlife. This report underlines the contribution that the high quality of the Norfolk coast’s environment makes to the area’s economy through tourism. This is increasingly significant with the decline of traditional forms of employment such as agriculture and fishing. The coast’s wildlife, scenery, towns and natural special character are all major factors at attracting visitors.

With changing patterns of holiday making, the outstanding wildlife and scenery are of increasing importance, with growing emphasis on the cultural and natural special character in attracting visitors.

The RSPB is committed to working in partnership with others to play its part in meeting this challenge. It has a long tradition of not only playing a leading role in protecting nature reserves. The RSPB has been using the Cambridge Model approach developed with the Regional Tourist Board to assess the contribution that the high quality of the Norfolk coast’s environment makes to the area’s economy through tourism. This is increasingly significant with the decline of traditional forms of employment such as agriculture and fishing. The coast’s wildlife, scenery, towns and natural special character are all major factors at attracting visitors.

The scenic richness and variety of much of the coast and hinterland is acknowledged by its designation as an Area of Outstanding Natural Beauty – see map for study area. It is based on a visitor survey of 10,000 visitors across six sites, which includes participation by 34 per cent of respondents identifying with them as their main reason for visiting. Other important reasons were scenery, landscape, and tranquility.

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Valuing NORFOLK'S COAST

People have long been attracted to the Norfolk coast by its special character, landscape and wildlife. Artists and writers have been inspired by its beauty while Cley Marshes and Blakeney Point have been renowned for their bird life for more than 150 years.

The scenic richness and variety of much of the coast and coastline is acknowledged by its designation as an Area of Outstanding Natural Beauty (AONB) and by the series of nature reserves, sites of special scientific interest, areas of peace and wilderness, a gentler pace of life and traditional rural villages, that ensure that visitors return often to something to settle here.

Visitor Survey Site

Six sites were chosen for the visitor survey to provide a geographical spread and to be representative of visitors motivated by the area’s wildlife and environment.

- Blakeney Quay car park (estimate 140,000 visitors)
- Cley Marshes Norfolk Wildlife Trust visitor centre (estimate 100,000 visitors to whole reserve)
- Lady Anne’s Drive, Holkham (estimate 110,000 visitors)
- Morston Quay car park (estimate 140,000 visitors)
- Snettisham beach car park (estimate 41,000 visitors)
- Titchwell Marsh RSPB visitor centre (135,000 visitors)

Activities of Visitors to Survey Sites

Surveys were carried out in August and October 1999 to access both summer and autumn and winter bird spectacles, which are poorly paid and seasonal, and demand for holiday homes is putting house prices beyond the reach of most local people.

The challenge ahead is effectively addressed in the East of England Tourism Board’s strategy for 2000-2010:

- It is not managed wisely we can change this, the environment and water bodies are central and environmental and cultural, climate change and the increasing emphasis on sustainable development.

When deciding on a particular site for their visit, 84 per cent of respondents identified them as their main reason for visiting the area. Other important reasons were scenery, landscape, and tranquility.

The outstanding wildlife of the Wash and north Norfolk coast is recognised by a host of designations and many nature reserves. No other area of coastline can match this coastline for its range and variety of wildlife.

While tourism provides jobs and income, and helps ensure the vitality of local shops and services, the benefits are not universally felt.

While tourism is often considered a major source of sound, tourism can increase demand for holiday homes, which lead to house prices beyond the reach of most local people.

Visitors to each site were asked about the importance of the site itself in influencing their decision to visit the area. In each case 30-40 per cent of visitors identified the site as the main reason for their visit. Cley and Titchwell visitors were more likely to have planned to visit these sites before reaching the area than visitors to the other four sites, perhaps on account of their national reputation as leading nature reserves.

While tourism provides jobs and income, and helps ensure the vitality of local shops and services, the benefits are not universally felt. More insidious is the apparent contribution of vehicle emissions to poor air quality. More alarming is the contribution of vehicle emissions to climate change, which threatens many of the area’s least viable sites through sea-level rise.

The scenic richness and variety of much of the coast and coastline is acknowledged by its designation as an Area of Outstanding Natural Beauty (AONB) and by the series of nature reserves, sites of special scientific interest, areas of peace and wilderness, a gentler pace of life and traditional rural villages, that ensure that visitors return often to something to settle here.

Visitor Expenditures

Interviews were asked what they had purchased, or planned to purchase on the day of their visit and this was used to estimate their spending over the duration of their stay.

Estimated Trip Expenditure

Average trip expenditure per visitor were highest at Cley and Blakeney, and lowest at Holkham.

Additional turnover from visitor spending supports jobs primarily in the accommodation, catering, entertainment and retail sectors. These businesses indirectly support additional jobs when buying goods and services. In turn money spent locally by employees whose jobs directly or indirectly depend on visitor spending, supports further jobs.

While tourism provides jobs and income, and helps ensure the vitality of local shops and services, the benefits are not universally felt.

More alarming is the contribution of vehicle emissions to climate change, which threatens many of the area’s least viable sites through sea-level rise.

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Visitors to the six sites were asked about the importance of the site itself in influencing their decision to visit the area. In each case 30-40 per cent of visitors identified the site as the main reason for their visit. Clay and Titchwell variants were more likely to have planned to visit these sites before matching the area than visitors to the other four sites, perhaps on account of their national reputation as leading nature reserves.

Activities of Visitors to Survey Sites

<table>
<thead>
<tr>
<th>Activity</th>
<th>% of Parties Participating</th>
<th>% of Parties Identifying Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wildlife spotting</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>Seal watching</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Birdwatching</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Beach visit</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Fishing</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
| Avocets, a favourite with visiting birdwatchers

**Reasons for Visiting**

80% of respondents identified them as their main reason for visiting. Other important reasons were scenery, landscape, and tranquility.

**Visitor Expenditures**

Interviewees were asked what they had purchased, or planned to purchase on the day of their visit and this was used to estimate their spending over the duration of their stay.

**Estimated Trip Expenditure**

<table>
<thead>
<tr>
<th>Average Daily Spend (£)</th>
<th>Average Trip Spend (£)</th>
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</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td>Food and Drink</td>
</tr>
<tr>
<td>4.41</td>
<td>19.72</td>
</tr>
<tr>
<td>Entry Fees</td>
<td>Entertainment</td>
</tr>
<tr>
<td>0.69</td>
<td>1.99</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>Shopping</td>
</tr>
<tr>
<td>3.93</td>
<td>16.03</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>1.94</td>
<td></td>
</tr>
</tbody>
</table>

Average trip expenditure per visitor were highest at Clay and Blakeney, and lowest at Holkham.

Additional turnover from visitor spending supports jobs primarily in the accommodation, catering, entertainment and retail sectors in the area. The survey also indicates that tourism indirectly supports additional jobs when buying goods and services. In turn, money spent locally by employees whose jobs directly or indirectly depend on visitor spending, supports further jobs.

**Valuing Norfolk’s Coast**

Environment - wildlife - tourism - quality of life

The outstanding wildlife of the Wash and north Norfolk coast is recognised by a host of designations and many nature reserves. No other coast in England is so extensively and so successfully managed by man, and the visitor can match this coastline for its richness and variety of wildlife.

This report focuses on the economic value of tourism associated with the special wildlife and environment of the Norfolk coast — six key study sites. It is based on a series of case studies and visitor surveys carried out at six key study sites in the Wash and north Norfolk coast, which provides estimates of the scale and value of tourism of the Wash and north Norfolk coast.
The 14,018 actual jobs supported by visitor spending in N & W Norfolk accounts
for 35.6% of all jobs in the two District Council areas. There is no evidence from the survey that any significant jobs figure for the study area.

Spending and jobs attributable to different features of the area

<table>
<thead>
<tr>
<th>Feature</th>
<th>Actual Spend</th>
<th>Actual Jobs</th>
<th>FTE* Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beaches</td>
<td>£2.4 million</td>
<td>71</td>
<td>50</td>
</tr>
<tr>
<td>Scenery &amp; landscape</td>
<td>£2.7 million</td>
<td>81</td>
<td>58</td>
</tr>
<tr>
<td>Peace &amp; tranquility</td>
<td>£2.8 million</td>
<td>84</td>
<td>60</td>
</tr>
<tr>
<td>Volunteers</td>
<td>£0.5 million</td>
<td>25</td>
<td>12</td>
</tr>
<tr>
<td>Other</td>
<td>£4.3 million</td>
<td>175</td>
<td>125</td>
</tr>
</tbody>
</table>

The owners/managers of twelve businesses were interviewed, at locations including the Lifeboat Inn, Thornham, and the Le Strange Arms Hotel, Hunstanton.

For all businesses surveyed, tourists represent an important or crucial part of their customers. Asked what attracts the tourists they cite the scenery, beaches, walking, wildlife, seal watching, and especially the unspoilt quality of the area. Peace and quiet, the ability to get away from it all. Several commented on the changing patterns of visiting with fewer day-trippers and more visitors in the shoulder months and winter. Some expressed concern about the possible negative impact of a continued increase in visitor numbers.

Visitors’ views about the study area

When visitors were asked what they liked about the area, common answers included peace and quiet, wildlife, scenery, beaches, walking, seal watching, and especially the unspoilt quality of the area. "Everything" was a common answer to this question.

Some mentioned the lack of commercialisation and the local people’s involvement. Asked about dislikes the most common answer was "nothing". Others mentioned the increasing number of visitors, the growing levels of traffic, the quality of the roads, and the level of car parking charges.

For further information, or a copy of the full report please contact Paul Lewis at the address below.

RSPB East Anglia Office, Stalham House, 65 Thorpe Road, Norwich, Norfolk NR1 1UD
Tel: 01603 661662 E-mail: paul.lewis@rspb.org.uk Web: www.rspb.org.uk

Chapter title: The economic benefits of a high quality environment

Valuing NORFOLK’S COAST

Environment - wildlife - tourism - quality of life

For birds for people for ever

The economic benefits of a high quality environment

The potential of wildlife tourism

Striking a balance for the future
For all businesses surveyed, tourists represent an important or crucial part of their customers. Asked what attracts the tourists, they cite the scenery, beaches, walking, wildlife, walking, sea, and especially the unspoilt character of the area; peace and quiet; the ability to get away from it all. Several commented on the changing patterns of visiting with more short breaks and more visitors in the shoulder months and winter. Some expressed concerns about the possible negative impact of a continued increase in visitor numbers.

**Economic Impact of Nature Reserves**

A survey of nature reserves in the area looked at sites managed by the RSPB, English Nature, Norfolk Wildlife Trust and the National Trust. This examined their expenditure in the local economy, direct employment on reserves and use of volunteers.

*Nature reserves make a valuable contribution to the local economy, including:
- direct employment of 35 actual jobs (24 FTE jobs) (total £2.45m spend in the local economy supporting 52 direct and indirect FTE jobs.
- a further 4 FTE jobs as a result of spending by reserves and businesses, (total) £0.5 million at Snettisham to £4.3 million at Blakeney
- volunteers contribute just under 3,000 days of work per year on the sites

**Business Case Studies**

### Visitors’ views about the study area

When visitors were asked what they liked about the area, common answers included peace and quiet, scenery and landscape, birds and wildlife, and the general unspoilt nature of the area. “Everything” was a common answer to this question.

* To take up many opportunities of it isn’t prepared one. Good open space, of all are wildflowers.  (פונדק סנטידייסמה)
* Scenery & landscape £2.7m 81 58
* Scenery & landscape £2.7m 81 58
* Scenery & landscape £2.7m 81 58

The 14,018 actual jobs supported by visitor spending in N & W Norfolk accounts for 17.5% or 1 in 6 of all jobs in the two District Council areas. There is no reliable means for estimating visitor spending attributable to different features.

**Spending and jobs attributable to different features**

**Summary of visits, expenditure and jobs supported**

<table>
<thead>
<tr>
<th>Business Location</th>
<th>Staff</th>
<th>FTEs</th>
<th>Visitor Spending</th>
<th>Visitor Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Le Strange Arms Hotel</td>
<td>25</td>
<td>25</td>
<td>£507m</td>
<td>14,018</td>
</tr>
<tr>
<td>The Lifeboat Inn Thornham</td>
<td>10</td>
<td></td>
<td>£6.5m</td>
<td>9,997</td>
</tr>
<tr>
<td>The Hamble Inn Stalham</td>
<td>10</td>
<td></td>
<td>£5.5m</td>
<td>9,997</td>
</tr>
<tr>
<td>Searles family Hunstanton</td>
<td>65</td>
<td>150</td>
<td>£2.4m</td>
<td></td>
</tr>
<tr>
<td>Holkham Pottery Holkham</td>
<td>5</td>
<td>4</td>
<td>£2.8m</td>
<td></td>
</tr>
<tr>
<td>Holkham Nursery Holkham</td>
<td>3</td>
<td>6</td>
<td>£2.7m</td>
<td></td>
</tr>
<tr>
<td>Made in Cley Cley-next-the-Sea</td>
<td>5</td>
<td>2</td>
<td>£0.5m</td>
<td></td>
</tr>
<tr>
<td>The Hoste Arms Burnham Market</td>
<td>50</td>
<td>20</td>
<td>£2.45m</td>
<td></td>
</tr>
<tr>
<td>Grooms Bakery Burnham Market</td>
<td>1</td>
<td>2-3</td>
<td>£1.81m</td>
<td></td>
</tr>
</tbody>
</table>

**The economic benefits of a high quality environment**

### Striking a balance for the future

The potential of wildlife tourism

**For further information, or a copy of the full report please contact Paul Lewis at the address below.**

RSPB East Anglia Office, Stalham House, 65 Thorpe Road, Norwich, Norfolk NR1 1UD

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Registered Charity No. 207076

**The power of the ‘green pound’ (RSPB Images)**

**Quotes from businesses**

* My business is to create something that others can come and see and enjoy. It’s a way of life.*  Sydney Hinks
* We’ve been here since the 1960s.  We’ve been at it for a long time, and our customers love the peace and quiet.*  John Haynes
* We’re doing what we’ve always done, but with a bit more marketing.  It’s a way of life.*  Barbara Widdup

RSPB Striking a balance for the future

**The economic benefits of a high quality environment**

**The potential of wildlife tourism**

**for birds for people for ever**

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The power of the ‘green pound’ (RSPB Images)

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**Notes:**

1. Some businesses interviewed were interviewed to ascertain their views on the value of nature reserves to their individual businesses. Such small sample can only provide a snapshot and does not claim to be representative of the entire business sector within the study area. The sample also has a small sample can only provide a snapshot and does not claim to be representative of the entire business sector within the study area. The sample also has a small sample can only provide a snapshot and does not claim to be representative of the entire business sector within the study area. The sample also has a...