

NORFOLK COAST PARTNERSHIP

NORFOLK COAST AONB

TOURISM BENEFIT & IMPACTS ANALYSIS

FINAL REPORT

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Prepared by

Scott Wilson Ltd
3 Foxcombe Court, Wyndyke Furlong,
Abingdon Business Park, Abingdon
Oxon, OX14 1DZ

Tel: +44 (0) 1235 468700

Fax: +44 (0) 1235 468701

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1 Introduction

1.1 The following report provides the findings of Scott Wilson's investigation into the benefits and disbenefits of tourism to the Norfolk Coast Area of Outstanding Natural Beauty (AONB), a study conducted on behalf of the Norfolk Coast Partnership.

1.2 Tourism forms a strong part of the overall fabric of the Norfolk Coast area. The AONB includes the resort of Wells-next-the-Sea whilst the border skirts around Cromer, Sheringham and Hunstanton as well as neighbouring King's Lynn; and crossing the border of Great Yarmouth in the East so as to include Waxham and Horsey. The visitor appeal of the Norfolk Coast is that it is synonymous with attractive landscapes; nature and wildlife; and character villages.

1.3 As a result, tourism, leisure and recreation are key concerns of the Partnership, who from 1991 have been responsible for the management of the AONB. According to the current AONB Management Plan, the Partnership is seeking to:

- work towards a viable broad based economy within the AONB whilst maintaining its natural beauty;
- support and advise the tourism industry so that it may take account of the specific environmental, social and economic needs of the AONB;
- establish and develop systems to manage pressure on key wildlife species and habitats within the AONB; and
- improve the opportunities for the understanding and awareness of the AONB and its sustainable use as a recreational resource.

1.4 The motivation behind this study is to firmly identify the costs and benefits of tourism to the AONB, in order that more effective management techniques can be identified based on the principles of sustainability. Thus, the study needs to reflect the interests of business, the environment, the community, and the visitors; all as equal stakeholders.

1.5 The Partnership identified the need to complete a two-phase study.

Phase I

1.6 The main objectives of Phase 1 of the study, as identified in the brief, is to:

- Undertake a desktop based research exercise using available data to show:
 - positive benefits of visitor activities and provision, by examining spending profiles, economic penetration, financial and employment benefits in and around the AONB; and

- negative impacts of visitor activities and provisions through resident surveys, traffic movements, perceptual differences, local records etc in and around the AONB.
 - Research and report on existing relevant studies from other areas that may be transposable to the Norfolk Coast AONB.
 - Identify relevant methodologies that may be applicable for Phase II of the tourism project.
 - Identify any gaps in information or issues requiring verification during Phase II and methodologies for achieving this.
- 1.7 The evidence gathered for this phase of the study is to provide information on the scale and characteristics of tourism within the AONB and surrounding areas; analysis of visitor trends and markets, with particular reference to countryside visits; and an overview of developments that will influence future activities within the visitor sector.
- 1.8 A key output of this study is to identify the gaps in information provision and to recommend suitable methodologies for filling these knowledge gaps for Phase II.

Phase I Approach

- 1.9 To fulfil the requirements of Phase I of the project, Scott Wilson has adopted the following approach:
- To define the Norfolk Coast AONB, its core characteristics, and its specific sensitivities.
 - To undertake an audit of the tourism sector within the AONB, in order to identify its key tourism assets, both in terms of attractors (physical and man-made) and the level of existing facilities and services that cater for visitors (accommodation, transport, public houses).
 - To specify the more generic impacts of tourism, including some of the more global effects of travel, and how they may manifest themselves at a local level.
 - To identify the specific impacts of tourism within the AONB, drawing upon evidence gathered by previous studies, and/or up-dating this information where applicable to ensure that it is representative of the current situation.
 - To review methods and initiatives adopted in similar environments that are specifically aimed at tackling some of the more detrimental impacts of tourism; or which aim to retain the benefits gained from tourism more effectively.

Phase II

- 1.10 The key aims of Phase II is to build upon the findings of Phase I through specific primary research with both visitors and the local stakeholders in tourism.
- 1.11 Ultimately, the conclusions and recommendations of study should seek to:
- guide a future review of the 1995 Visitor Management Strategy and visitor zoning scheme in relation to developing a sustainable tourism offer, which is to be based on a comprehensive understanding of the true costs and benefits of tourism activities and provision within the AONB;
 - co-ordinate the tourism strategy objectives work being undertaken by local authorities; and
 - minimise the negative and optimise the positive impacts of tourism activities and provision in and around the AONB.

Approach

Community Workshops

- 1.12 Scott Wilson hosted two community workshops, inviting selected representatives from tourism businesses, environmental organisations, and communities.
- 1.13 The aim of the workshops was to test the magnitude to which the impacts identified in Phase I become evident within the Norfolk Coast AONB, and to determine any potential initiatives and approaches that could assist the Norfolk Coast Partnership achieve their objectives.
- 1.14 Altogether, 70 representatives were invited, as selected by the Partnership and the Steering Group, of which 20 attended. To ensure a holistic and inclusive approach, all invitees unable to attend were sent a self-completion form consistent with the topics raised at the workshops themselves. Altogether, 19 responses have been received and analysed.

Visitor Survey

- 1.15 The brief originally identified that the visitor survey should be in the form of a questionnaire-based survey.
- 1.16 However, upon commissioning it was agreed that a more appropriate method would be to engage Visitor Focus Groups. Whilst Focus Groups are not designed to be statistically robust, they provide a much greater depth of understanding in terms of knowledge, awareness, and behaviour. It is also a much more effective measure for testing initiatives that could help to change visitor behaviour and alleviate certain pressures. The Steering Group for this study agreed that this would be the preferred approach.

1.17 On the basis of this understanding, Scott Wilson employed the services of the East of England Tourist Board and Yorkshire Tourist Board to conduct two Visitor Focus Groups, one with overnight visitors (hosted in Leicester), and one with predominantly day visitors (hosted in Norwich).

Definitions of Tourism

1.18 A recurring feature throughout the study process has been the question over the definitions of tourism and visitors.

1.19 In identifying both the benefits and impacts of tourism to the Norfolk Coast AONB, it is therefore necessary to define what is meant by **tourism** and **visitors**, and how these differ.

1.20 The official definitions are:

- **Tourist** – a person temporarily away from their usual environment for a period of more than one day but not more than one year, and for a broad range of leisure, business, religious, health and personal reasons, excluding the pursuit of remuneration from within the place visited or long-term change of residence.
- **Leisure day visits** – all round-trips made from home for leisure purposes to locations. People must start from and return to their home within the same day, but there is no lower time limit.
- **Tourism day visits** – defined as those leisure day visits which last for three hours or more and are not taken on a regular basis.

1.21 The importance of these definitions is that the main emphasis of the report is on **tourism trips**. This includes 'Tourists' and 'Tourism Day Visits', but generally excludes all other 'Leisure Day Visits'. This is because the broader 'leisure' day visits includes residents walking their dogs, going to the gym, and recreational shopping. In contrast, 'tourism' day visits are more specifically related to day trips which are more specifically based on recreation, and because of the time limit applied, are more likely to involve a) discretionary spend and b) trips that are some distance away from the visitors natural environment.

1.22 However, during the course of this study, it has become obvious that all visitors are deemed to have an impact, particularly in relation to environments with specific sensitivities. In these instances, it is not possible to distinguish between tourists, leisure day visits, or tourism day visits. Therefore, in some instances reference is made to the more generic term of 'visitor' to reference all visitors.

2 Norfolk Coast Area of Outstanding Natural Beauty

2.1 The following section highlights the importance of the AONB, in terms of its designation, the sensitivity of the environment, and the community as a whole.

Designation Overview

2.2 The area which now forms the Norfolk Coast AONB was identified as a potential conservation area as early as the late 1940's/early 1950's during the preparation for the designation of the National Parks. However, the process for establishing the Norfolk Coast as a special conservation area did not begin in earnest until 1961.

2.3 After a degree of change and consultation on the areas and settlements to be included (and excluded) in the designation, the final AONB boundary was agreed in 1968, as the greater part of unspoiled coastal areas between the Wash and Great Yarmouth, including:

- the Western Outlier that comes within two miles of King's Lynn and covers part of the Sandringham Estate and the Southern Section of the Wash;
- from Holme-next-the-Sea in a continuous coastal strip varying in depth from three to five miles, extending eastwards to a point near Bacton, but excluding the built up areas of Hunstanton, Sheringham, Cromer, Mundesley, Overstrand and Holt.
- the Eastern Outlier stretching from Sea Palling to Winterton, with a key feature being the Winterton Dune system.

2.4 The key aspects of the Norfolk Coast that prompted the need for its conservation revolved around its nature and geomorphological assets. These reasons still remain the same today, namely to ensure the conservation of its:

- Marshland;
- Unique saltmarshes;
- Mud-flats;
- Extensive sand and shingle ridges;
- Sand dunes; and
- Chalk and boulder clay landscapes and high eroding cliffs.

- 2.5 In addition to these physical land forms, the Norfolk Coast AONB is also home to a wide variety of special fauna and flora, and is renowned for its wildlife watching opportunities; its coastal environs are complemented by the rising backdrop of agricultural land, chalk downland, secluded river valleys, and the woodlands and heathlands of the Cromer Ridge; and the area is rich in archaeological and historical sites, from Palaeolithic times to World War II. The AONB also benefits from remoteness, its peace and tranquillity, and the quaint character of its villages and small fishing ports.
- 2.6 Altogether, these features and characteristics combine to create an area which is described as being one of the most undeveloped and unspoilt coastal areas in the UK.

Key Facts & Figures

- 2.7 The following are the key facts and figures relating to the Norfolk Coast AONB:
- It is approximately 453km² in area.
 - It spans the administrative boundaries of King's Lynn & West Norfolk, North Norfolk and Great Yarmouth (Map 2.1).
 - It includes 90.8kms of coastline, including the length between Holme-next-the-Sea and Weybourne which is a designated Heritage Coast zone in recognition of its unique and undeveloped nature.
 - It has a total population of 40,393, of which 57% are of working age, 15% are under the age of 16, and 28% are over the age of 65.
 - The area contains 18,280 households.
 - Ancient woodland covers 2.8 square kilometres.
 - It includes 287kms of public rights of way.

Sensitivity of the Environment

- 2.8 The Norfolk Coast AONB includes a particularly sensitive environment, namely its coastline. As previously highlighted, the geomorphological characteristics of the coastline contribute a core component of the AONB designation. It is also considered to be one of the largest expanses of undeveloped coastal habitats of its type in Europe.
- 2.9 The environmental significance of the AONB from a biodiversity and ecological perspective is reflected in the fact that it contains:
- 12 Nature Reserves, including Reserves considered to be of national and international importance;
 - 28 SSSI's whose combined areas cover around 120.22 km² (26.5%);

- a Ramsar Site (Holme to Weybourne) designation; and
 - part of the Wash and Norfolk Coast European Marine Site (EMS), which is a means of defining a Special Protection Area (SPA - promoting and encouraging the viability of bird species listed under the Birds Directive) which incorporates sub-tidal and/or inter-tidal environs.
- 2.10 Thus, the north Norfolk coastline is considered to be within the ten most important wetland sites in Britain for numbers of waterfowl, and the number one site in Britain for numbers of wildfowl.
- 2.11 To exemplify the ecosystems and habitats it supports, over the winter the Ramsar area is reputed to support in excess of 91,000 waterfowl. This includes Dark-bellied Brent Geese, Knot, Pink-footed Geese, Pintail, Wigeon and Bar-tailed Godwit, all at high population levels from an international perspective.
- 2.12 During breeding season, the area supports Common Tern, Little Tern and Sandwich Tern. Other bird species common to the AONB shoreline include the Bittern (5% of the GB population), Marsh Harrier (6.4%), Avocet (9.9%), Common Scoter (6.7%), Grey Plover (2.7%), Spotted Redshank (3.3%) and White-fronted Geese (5.8%). All are at significantly high levels for the overall population within Great Britain (5 year peak, with recordings ranging from 1992-1997).
- 2.13 In addition, the area is a breeding ground for the Common Seal – with a breeding population of international significance – Grey Seal, Lobster, Plaice, Ross Worm, Spider Crab, Mussels, Natterjack Toad and Brittle Starfish for example.
- 2.14 Overall, therefore, the Norfolk Coast AONB is considered to be a wildlife resource of utmost importance in terms of the UK and Europe, and thus whose biodiversity needs to be conserved and enhanced for future generations.

Sensitivity of the Community

- 2.15 An important consideration for any protected area designation is its impact on the local community.
- 2.16 The designation itself aims to conserve and enhance the character of the environment that it is designed to protect. This includes, by virtue of the settlements within the AONB, the local community.
- 2.17 The AONB is characterised by small rural/coastal towns and villages with features of architectural heritage. They are generally unspoilt by modern development, retaining much of their historic charm. Specific value is placed on the peace and tranquillity of the life they have within this area, and to date the area has resisted pressure for change and modernisation that would impinge upon this.
- 2.18 This is a core value that any protected area can offer its residents. However, this preservation of lifestyles and traditions can come at a price. It can lead to a stifling of the economy, and in turn this

can lead to an exodus of younger generations in search of employment. Moreover, welfare and prosperity can suffer, with many rural areas of the UK suffering from high levels of deprivation.

Tourism Context

- 2.19 A balance is required within the Norfolk Coast AONB between the need to develop industrial sectors which on the one hand support the local economy and welfare of the community, whilst also maintaining the character and qualities of the natural environment in its widest sense.
- 2.20 In this respect, tourism, which relies upon the quality of high value landscapes, is regarded as one such economic activity. The general advantages are that:
- tourism generally does not require heavy plant;
 - it relies on the quality of the environment, which in turn should lead to the support for the conservation of high quality landscapes;
 - it brings in an export income through visitor spend; and
 - this in turn supports local employment and local amenities.
- 2.21 However, as the following sections within this report highlight, tourism also involves interaction with the environment and the community, and this can have consequences that negate some of the benefits accrued, including:
- damage to the very environment that tourism professes to support;
 - disruption to the lives and routines of local residents; and
 - the creation of mainly low paid and low skilled employment opportunities.
- 2.22 It is the aim of this report to seek a balanced approach by identifying both the costs and benefits of tourism to the Norfolk Coast AONB. This will be achieved by not only linking the economic value of tourism to the environment, but also by highlighting that the quality of the environment is the key driver behind this type of economic activity.
- 2.23 Likewise, it will be demonstrated that tourism, due to its economic benefits, can contribute to the local community prosperity and welfare. However, this will be balanced by demonstrating that some elements of the interaction between visitors and local residents can encroach upon the quality of life of the local community.

3 Visitor Sector Overview

3.1 As part of this study, it was deemed necessary to provide a detailed review and audit of the context of tourism in relation to the Norfolk Coast AONB. This has included:

- a review of the tourism assets and appeal in its widest sense;
- an audit of the nature of all visitor attractions within the area;
- an audit of tourism accommodation types, volume and distribution;
- a review of other facilities and amenities available to visitors, or which could attract niche markets; and
- a review of the nature of the visitor market and the key drivers which motivate visits.

3.2 Whilst this information is important in relation to this study, much of the text is descriptive in nature. It is therefore felt to be more appropriate to provide an overview of these studies here, with the audits themselves contained within Appendix A1.

The Natural Environment as a Tourism Asset

3.3 Without doubt, the key asset within the Norfolk Coast AONB from a tourism perspective is in relation to the quality of the natural environment in its widest sense.

3.4 The high value landscapes that are unspoilt by modern-day standards; the charm and character of its villages and coastal settlements; and the opportunity for 'escapism' all combine to provide an attractive proposition to both tourists and day visitors alike.

3.5 There has not been a recent study which identifies the overall significance of these aspects of the offer in attracting visitors. Needless to say, however, that the designation of the AONB denotes that the area has something special enough to require preservation that is deemed of national importance. Moreover, the unique qualities of the AONB are further enhanced through its other specific designations, including (see Map 3.1):

- 12 nationally and internationally important Nature Reserves;
- 28 Sites of Special Scientific Interest;
- A Ramsar designation between Holme and Weybourne; and

- The fact that much of the coastline, including that contained within the Western Outlier round to Weybourne, forms part of the European designated Wash and North Norfolk Coastal EMS.
- 3.6 All of this creates the impression of the whole area being preserved and unspoilt, generating connotations of the aesthetic qualities of the area. This, combined with the proposition of staying in a rural village or coastal settlement of quaint and unspoilt character and charm, presents a strong, coherent and recognisable visitor product.

Key Visitor Markets

3.7 Although a visitor survey was conducted as part of the RSPB's 'Valuing the Norfolk Coast' project, the study had a specific and deliberate bias towards wildlife-based tourism. In order to provide a more rounded view, Scott Wilson has reviewed the key assets to determine the key drivers behind a visit to the Norfolk Coast AONB. This includes:

- **Countryside escapism**, with the Norfolk Coast perceived to be a particular attraction for people from urban areas (London and the Midlands) looking to escape the pressures and strains of their working life by immersing themselves in an attractive countryside/coastal setting.
- **Traditional coastal trips**, but those who are seeking a more relaxing, secluded and escapist experience compared to the resorts of Cromer, Sheringham and Hunstanton, and who will place a high premium on the quality of the surrounding landscape.
- **Wildlife watching**, which is a potential growth market due to greater public awareness of the environment and conservation issues. This is a key strength of the Norfolk Coast AONB through its bird life and seal colonies.
- **Activities orientated**, with some adventurous activities such as wind (Kites, Kite Buggy, Kite Surfing) and water sports (canoeing/kayaking, sailing, jet skiing and power-boating) growing in popularity, although at relatively low proportions. Opportunities for game shooting, fishing, and golf can also prompt visits. Visits are less motivated by specific provision for walking and cycling, although walking remains a key activity undertaken once at the destination.
- **Cultural and sightseeing**, particularly through Sandringham House, Holkham Hall, Felbrigg Hall and the North Norfolk Railway, but also through the local festivals which have a much wider audience than local residents. Overall, it is felt that this market could be enhanced across the whole of the northern reaches of Norfolk through greater 'theming'.
- **'Nostalgia' trips**, from people re-living their childhood, or re-visiting areas that they may have lived in at previous life stages ('during the war').

- **Food & Drink**, with several comments from visitors suggesting that the Norfolk Coast has the potential of offering a strong 'local' context for certain foods and beverages.
- 3.8 Whilst it is sometimes precarious to generalise about the characteristics of these markets, in the absence of a more detailed visitor survey, there are suggestions that the Norfolk Coast appeals to an older and slightly more affluent socio-economic groups, particularly in areas such as Burnham Market, Holkham, Blakeney and around Holt. This is reflected in some of the more boutique-style serviced accommodation establishments, which although on a small scale are definitely at the upper end of the market.
- 3.9 The wildlife watchers tend to be driven more by bird life cycles than traditional tourism seasons, with many visitors of this type observed all year round. Wells-next-the-Sea, however, as the main resort within the AONB, is observed to attract a high proportion of families during school holidays, bank holidays and weekends.
- 3.10 'Nostalgia' seekers are, by their very nature, slightly older and use more expensive accommodation types. Conversely, activity seekers tend to be younger and utilise cheaper forms of accommodation (YHA, camping).

Tourism Plant Overview

- 3.11 On the whole, the tourism market for the AONB is matched by a good mix of tourism accommodation, attractions and other facilities. In particular, it is felt that:
- the level, mix and distribution of accommodation is appropriate given the nature and character of the tourism offer (see Map 3.2);
 - there is a good range of activities for visitors to undertake, particularly in relation to some of the more popular pursuits such as walking, cycling, and fishing;
 - certain specialist activities are also catered for in relation to game shooting, canoeing/kayaking, and sailing, whilst there has been a growth in more adventurous activities such as kiting, kite buggying, and kite surfing although in relatively small proportions; and
 - shopping through the boutique and antique style shops at Holt, and which is being replicated to a certain degree in Burnham Market and Wells-next-the-Sea, for example.
- 3.12 The only matter of concern regarding the tourism plant within the AONB is in relation to sightseeing attractions (Map 3.3). Whilst individually, these attractions do play a role in the overall strength of the tourism product for the Norfolk Coast AONB, their current contribution is considered to be more supplementary to its primary (natural) assets. Perhaps with the exception of Sandringham House and

Holkham Hall, the culture and sightseeing market is considered to be an under-exploited sector along the Norfolk Coast. In particular, it is felt that the attractions could be strengthened by combining them into 'themes' to give the whole area a much stronger identity in terms of raising awareness of the sightseeing potential.

Transport Overview

- 3.13 A key concern in relation to tourism within the Norfolk Coast AONB is the capacity of the local road network to cope with the increases in traffic that visitors create.
- 3.14 Overall, the road network appears to be of an insufficient standard to cope with high levels of traffic, with the A149 narrowing considerably in Cley-next-the-Sea and Stiffkey, for example, making it difficult for traffic running in opposite directions to pass comfortably.
- 3.15 The challenge facing the transport system in relation to tourism is to persuade people to divorce their car during their stay and opt for alternative means of transport. In this respect, the Norfolk Coast's Coastal Hopper bus service provides the foundation of a public transport network that has both locals and visitors needs in mind. This service is now at the heart of the public transport network within the AONB, linking with many of the key towns, villages and places of interest. It also promotes multiple use and links with other networks through its Rover and Rover Plus ticket combinations.
- 3.16 Initial indications suggest that the service is successful, and has gained increased patronage year-on-year since it began operating. Overall, there may be further scope to enhance this service, and adopt a more integrated approach with other public transport services, key tourism sites/areas for potential economic activity, and particular walking and cycling routes. This is to ensure that anyone travelling to the AONB can be assured easy passage to his or her chosen destination. Coupled with sensitive pricing and/or discounting to attractions, this will be a fundamental component of driving up the use of sustainable transport.

4 Visitor Management Overview

4.1 A key aspect of the Norfolk Coast is the array of authority, management and access organisations who actively participate, through one means or another, in the use and maintenance of the Norfolk Coast AONB, particularly its more fragile sites.

4.2 The key stakeholders consist of:

- administrative organisations, with the area of the Norfolk Coast AONB crossing the administrative authorities of North Norfolk, King's Lynn and West Norfolk, Great Yarmouth, as well as being under the auspices of Norfolk County Council;
- statutory organisations, including the Countryside Agency and English Nature. Please note that the activities of the Countryside Agency (Landscape, Access & Recreation Division) and English Nature, along with the Rural Development Service, are to be united in a single body in 2006 called Natural England.
- non-statutory organisations and lobby groups, including the East of England Tourist Board, the Country Land & Business Association, Campaign to Protect Rural England;
- access and conservation/management organisations, including the Norfolk Coast Partnership, Wash and & North Norfolk European Marine Site, the National Trust, Norfolk Wildlife Trust, and RSPB, and English Nature. The Eastern Outlier also borders with The Broads National Park, which as a Nation Park is managed by the Broads Authority;
- local parishes, businesses and community groups; and
- specialist user groups, such as Ramblers, Horse Riding Association, and more recently kite buggy clubs, water sports, and paragliding clubs.

4.3 The specific aims and objectives of the statutory, non-statutory and access and conservation organisations, including the Norfolk Coast Partnership are explored in more detail in Appendix A1. The specific aims and ambitions of local parishes, business and community groups have been identified through the consultation process.

Policies and Principles

4.4 Generally, the policies and principles of all management organisations state the desire for tourism to become a sustainable activity for the area or reserve that comes under the jurisdiction of their organisation.

- 4.5 In the case of the reserve conservation and management organisations, this includes having aims that recognise the need for public access and for people to enjoy and understand the natural habitats. Also, reference is generally made with regards to encouraging the visitor economy to be developed in a manner which is sympathetic to the natural environment, and the community which resides within the surrounding destination.
- 4.6 Likewise, the developing tourism policies of North Norfolk District Council, and the tourism strategy for King's Lynn & West Norfolk identify that future tourism development needs to be sensitive to its natural surroundings. Key issues identified include:
- the need for tourism to form part of a much broader economic base, with recognition of these specific dangers associated with a gearing of the economy which is too reliant on the economic benefits of visitors;
 - that any tourism development considerations must balance the needs for economic gain against the potential damage that increased visitation could cause in the disruption to the community, or overriding and irreversible damage to the environment; and
 - to encourage the creation of tourism employment opportunities which have training and development opportunities in order to retain young adults and families within the area, as part of a wider ambition for economy and community stability.
- 4.7 These statutory organisations recognise the strength of the Norfolk Coast AONB offer from a tourism perspective, and highlight that the area has grown in stature as a visitor destination. However, the documents also stress the need for specific tourism policies which reflect the conservation ambitions of the AONB itself in association with the Norfolk Coast Partnership.
- 4.8 The Norfolk Coast Partnership, in its latest Management Plan, states that the Norfolk Coast AONB is recognised as a local, regional and national recreational resource for people to visit, use and enjoy. In addition, the Plan suggests that the more people enjoy, understand and appreciate the area, the more likely they are to support the management needed to maintain its character.
- 4.9 However, the Plan recognises the growing influences that visitors and visitor behaviour are having on the AONB, and that a small level of inappropriate activities in sensitive areas can in fact have greater impact than large volumes of visitors in more robust areas. As a result, the main objectives identified include development of systems to manage visitor pressure on habitats; improving the understanding of the sustainable recreational use of the AONB; and to improving facilities and information for the disabled.
- 4.10 To assist with this aim, the Partnership in its previous Visitor Management Plan (1995) devised a Zoning Map (Map 4.1) which is still commonly referred to today. The principle behind the map was to

graphically state the areas of greatest sensitivity, and the principles that should be adopted in order to manage visitors more effectively. This was completed by defining the areas through a colour grading scheme according to sensitivity:

- Red and Orange define the most fragile wildlife habitats in the AONB yet are under considerable visitor pressure; and
- Green (light through to dark) denoting the most robust areas, and are highlighted as priority areas for encouraging visitor activity.

4.11 The strategy denotes a strict management technique of not promoting to visitors, and the reduction of parking in the red areas. The green areas are to be promoted for greater recreational use, to try and alleviate pressure from the red zones.

Key Issues

4.12 All of the key principles and policies of the various organisations charged with the management and conservation of the Norfolk Coast AONB, either in whole or in part, denote their desire to encourage sustainable development within the area.

4.13 Consideration is given to the main recognised potential problems caused by visitors. These will be addressed further in this study (see section 6). However, the benefit of this study is that it will help focus attention onto how these problems manifest themselves at ground level. This in turn should be used to guide the development and introduction of initiatives to ensure a consistent and truly sustainable approach to tourism management.

4.14 A key issue that we feel will need to be reconciled in any future Visitor Management Plan to the AONB concerns having a greater understanding as to why visitors visit these areas and what activities they participate in. Whilst the impacts of visitors will be explored in detail further within the report, in order to exemplify this point, the following projects are relevant:

- Blakeney National Nature Reserve offers visitors a rare opportunity to view and learn about seal colonies along this stretch of the British Isles. This will attract wildlife watchers specifically, but will also appeal to the other visitor markets, including those who visit by means other than a specific tour. Therefore, it cannot be assumed that all sightseers will have a specific knowledge of, or instigate the adoption of appropriate behaviour.
- Holme Dunes National Nature Reserve, whilst being a popular bird-watching site and containing a bird viewing observatory, also attracts traditional beach users and elements of the activity market due to its wide expanse of sandy beach. These visitors will have less regard for, or may in fact be totally unaware of, the environmental sensitivities in relation to birds and wildlife.

- Holkham Dunes National Nature Reserve, which has featured in several Films and TV programmes, and whose beach is considered to be one of the best-kept beaches in the UK. With its natural backdrop, it is an ideal beach for those wishing to undertake traditional seaside activities, but within a sense of 'escapism'. Again, this means that awareness of the Reserve and/or its specific sensitivities is likely to be low.
- 4.15 Ultimately, the areas identified at greatest risk within the management plan are also the areas that have the strongest visitor product/appeal association, and are thus likely to continue to attract a high volume of visitors. To reinforce this point, comments from some site managers/wardens have suggested that despite a 'No Promotion' policy of key areas, visitor volume appears to be increasing – particularly at Holme and Holkham. Moreover, this management technique is actually being undermined by the sites receiving 'unofficial' promotion and recognition amongst published books, newspaper articles, and accommodation operators directing visitor attention to these sites because of their interest value, unique features and/or attractive landscapes.
- 4.16 As such, we feel that there is a fundamental layer missing from the Visitor Management Plan zoning map. This relates to visitor type, motivation and usage of the different zones, particularly the red zones; i.e. why visitors choose to visit the more vulnerable locations, and their likely understanding of their impacts and effects on the natural environment. This should include all users, covering different user groups definitions; from tourism overnight, tourism day visit, and a visit from people who live locally; to activity, to culture/sightseeing/shopping, to wildlife watching; and so on.

5 Overview of Tourism Impacts

5.1 The following section aims to describe some of the more generic impacts regarding tourism and its host destination. These are explored in terms of tourism's relationship with:

- the economy;
- the environment; and
- with host communities.

5.2 It should be noted that the effects of tourism are rarely observed in isolation, with one specific action of a visitor often having a multitude of repercussions. For instance, an observation of increased traffic congestion caused by visitors can have environmental consequences (increased pollution, incidences of fuel spillages) and social consequences (affecting the daily routines of residents). Likewise, any impact that visitors have on the local environment could actually deter future visits, leading to a decline in the economic benefits.

Tourism & The Economy

5.3 Tourism is often regarded purely as a benefit to a destination, with the rationale for this assumption based on the economic value visitors bring to destinations. The expenditure of visits can, therefore, often be a driving force behind gearing (planned and unplanned) the economy of an area towards the tourism sector.

The Economic Benefits of Tourism

5.4 Tourism spend is essentially an export income because of the fact that the money visitors bring with them to spend on local goods and services is short-lived and is derived from outside the economy of the destination. The overall benefits of the receipts can be defined as follows.

Supporting Business

5.5 The spend of visitors helps to improve the viability of existing businesses within the area. This generally takes the form of direct interaction with visitors who purchase local goods and services once at the destination; i.e. accommodation, attractions, entertainment, retail, catering.

5.6 Many enterprises within these types of business essentially function to serve the visitor sector alone (accommodation and attractions), whilst others may have a predominantly local remit, but whose prosperity is bolstered by the visitor economy (retail and catering for example). In addition, tourism spend has been noted to help maintain the viability of many services and facilities in communities,

particularly rural communities, that may have become unviable if supported by local residents alone (public transport, local shops, countryside pubs and post-offices, etc.)

- 5.7 The wider benefit of visitor expenditure, however, is that it can support a range of other sectors, that on face value, have little relationship to tourism itself. For instance, other industrial sectors of the economy that are often supported by visitor spend include agriculture; the arts and crafts; building construction and maintenance; real estate; and cleaning. This equates to the local multiplier effect of tourism, which is a major factor as to why tourism is often referred to as a fundamentally positive activity.

Supporting Employment

- 5.8 The overall contribution of tourism to the economy is often stated in relation to both the value of visitor spend, and the level of employment that this spend helps to protect and/or create.
- 5.9 Again, due to the diversity of the sectors that gain from either the direct or indirect spend, the ultimate benefit of tourism is that it can support a diverse range of employment opportunities. This can include traditional and highly skilled activities (Milling, Stone Masonry, and an array of craft skills); or allowing people to enter a career that also has a high level of fulfilment and personal reward (activity instructor; conservation specialist); or whereby people can fit employment around their particular life-style or circumstances (part-time, seasonal).
- 5.10 Furthermore, tourism actually promotes entrepreneurial enterprise and self-employment within a variety of supply-side hospitality businesses, including accommodation, attractions, hire-facilities, and catering. In this respect, tourism can be an easy sector for people to enter into self-employment, particularly in comparison to other professions. This is because the skills required tend to be more generic and require a low level of specialist learning or high level of training.

Spur for Economic Regeneration & Diversification – Rural Communities

- 5.11 Due to the economic and employment benefits, it has long been recognised that the tourism sector has an important role to play in encouraging economic regeneration, revitalisation and diversification. The value of visitor spend, the fact that it translates into an export income, and its ability to support a wide range of interests, means that it is an attractive sector for many regeneration bodies. This is a factor reinforced by the inclusion of tourism activities and enterprises within many of the funding programmes for regeneration, including European (Objective 2) and Government (Defra) initiatives.
- 5.12 As a result, tourism is often regarded as a means of maintaining the economic sustainability of destinations. This is particularly important in rural areas and coastal communities, where traditional agricultural and/or fishing activities may be in decline and/or are no longer yielding a sufficient income to support the local economy.

- 5.13 For this reason, tourism still features as a high priority in terms of being a sector to develop as part of an economic regeneration package. For instance both Tynedale in the North of England and Caradon in the South West are looking to bolster the level of visits as part of their 'sustainable' approach to future economic development.

The Economic Costs of Tourism

- 5.14 Despite the value that visitors bring to the economy of the host destination, there are a series of costs that can be associated with tourism.

Environmental and Social Disbenefits

- 5.15 The known disbenefits of tourism are difficult to record as an economic measure, be it in relation to environmental damage, or disruption caused to the community by traffic congestion, or crime through theft.
- 5.16 The key issues and consequences of tourism with respect to social and environmental disbenefits are dealt with in more detail further in this section of the report. However, it should be noted that these types of disbenefits do have financial consequences, with funds often required to rectify, manage, or re-direct visitor impacts and behaviours; funds that are obtained through local tax payer contributions.

An Over-Dependency on the Tourism Sector

- 5.17 There is a danger that the financial benefits of tourism can be over-played in terms of economic development, and that this could lead to an economy becoming too heavily geared towards the tourism sector at the expense of other sectors.
- 5.18 If this occurs, the economy as a whole can become overly susceptible to changes in the dynamics of the visitor market, or to events that have a more global significance. This type of decline has been experienced in many traditional seaside destinations of the UK, for example, as the domestic market shifted its focus to the lure of guaranteed sunshine and the perceived better value from overseas destinations.
- 5.19 More recently, the outbreak of Foot and Mouth disease in 2001 and the recent terrorist attacks in London highlighted how vulnerable the tourism sector can be to forces that dramatically alter market behaviour. The critical lesson from both of these events is how the repercussions can filter deep into the supply chain of both the local and wider economy. The current threat to tourism within the UK, particularly in areas that have a strong association with wildlife, is Avian Flu.
- 5.20 Ultimately, it needs to be recognised that there is a fine line between promoting a prosperous sector of the economy for the benefit of all, and an over-proliferation of competing facilities and services. Whilst tourism can be a prosperous sector, it needs to form part of a diverse and multi-sectoral economy.

Tourism Employment

- 5.21 As highlighted in the 'Economic Benefits' section, one of the primary outputs of tourism spend is in relation to sustaining and supporting a high level of employment. However, in order to provide a balanced view, recognition also needs to be given to the nature of employment that tourism tends to generate.
- 5.22 The tourism sector generally attracts staff with low levels of skill, with the majority of positions being in the servicing or serving of visitors (hospitality, catering, cleaning). In addition, the sector as a whole suffers from connotations of poor working conditions, with common complaints amongst staff being low pay; low career progression and prospects; unsociable and long hours; and high levels of seasonal, part-time only opportunities.
- 5.23 As a consequence, tourism-related businesses experience high levels of staff turnover, low commitment, poor attitudes and poor communications skills. This in turn can translate into poor service and attitude when dealing with customers.
- 5.24 A further consequence is that the qualified and highly motivated individuals will tend to leave areas dominated by tourism employment in search of more rewarding opportunities. This can have implications from an overall economic development perspective in that tourism becomes the only viable sector because the workforce is too de-skilled to attract other industries.

Economic Leakage

- 5.25 A core component to the prosperity of any economy is the amount of leakage of spend through the purchase of goods and services from outside its boundaries. Leakage is another way of defining the lack of retention of monies spent within the local economy after the initial spend occurs.
- 5.26 Leakage of visitor spend is actually taken into consideration within Economic Impact Assessment through the 'indirect' round of economic spend. However, this leakage can be considerable, particularly in areas that are predominantly rural in nature.
- 5.27 To act as a guide, English Partnerships in association with the Regional Development Agencies, suggest that the amount of leakage is ultimately dependent upon the strength of the local supply chain, and how much the demand for supplies can be met by local producers and manufacturers. In areas of low employment and industry, it is not out of the ordinary to experience up to 50%-75% of economic leakage; or phrased in relation to tourism spend, between half to three-quarters of the money spent by tourists and tourism day visitors will leave the local economy within the first round of re-spend.
- 5.28 Effort to strengthen the local supply chain and employment from within the economy can help to reduce the leakage effects by ensuring that more spend is retained by local people and enterprises. This has

fundamental advantages for the prosperity of the community as a whole, although emphasis again needs to be given to ensuring that the economy is not too highly geared towards tourism.

Tourism & The Environment

- 5.29 There is a growing level of understanding of the connection between the environment and tourism, particularly in relation to the level of disbenefits that tourism causes.
- 5.30 As with many environmental issues, much more weight is now being given to promoting sustainable development within the tourism sector. The following section explores some of the more fundamental issues that have been identified in recent times.

The Environmental Benefit of Tourism

Special Designations and Tourism

- 5.31 The relationship between tourism and the quality of the environment is paramount for the majority of destinations, regardless of whether the key assets are built, natural or coastal.
- 5.32 Tourism is actually a means of describing the process of people leaving their place of residence for a prescribed period of time (greater than 3 hours in the case of day visits, but involving a return home on the same day; or an overnight stay for staying trips) in search of new environments that offer rewarding experiences. Depending on the individual motivations and choice of destination, this could be the discovery of environments or habitats; enjoying the beauty, peace and tranquillity of natural environments; discovering the architecture of built environments; for shopping and entertainment; or simply being in a place which offers different views to their 'norm'.
- 5.33 Tourism, therefore, can be a fundamental motivation for the protection and preservation of different environments across the UK. This is particularly true for rural areas and countryside locations that have highly desirable and attractive landscapes and features.
- 5.34 Indeed, the aim of meeting the recreational needs of visitors provided one of the original key drivers behind the call of the Ramblers Association, Youth Hostel Association, and the Councils for the Protection of Rural England and Wales for the establishment of special environmental designations in the 1940's. This subsequently led to the establishment of National Parks and Areas of Outstanding Natural Beauty. Whilst it would be untrue to claim that the designations themselves were established purely as a consequence of the specific tourism potential of the area, the tourism and leisure value of the designations are now well known.

Valuing Tourism Contribution towards the Environment

- 5.35 Perhaps the single biggest benefit of tourism in relation to the environment is the fact that spend generated by tourists and tourism day visitors can promote the up-keep and maintenance of the natural environment; and helps support organisations charged with the protection of sensitive habitats.
- 5.36 In recent times, there has been a concerted effort by protection-based organisations such as the RSPB and the Countryside Agency to place a financial value on the environmental aspects of the economy. The result has seen a series of statements being published that aim to demonstrate an economic value relating to the environment.
- 5.37 An RSPB report examining the relationship between Business and the Environment in the East of England, for example, highlighted that the environmental economy embraces a wide-ranging group of activities. This covers conservation practices that improve the quality of existing facilities; environmental consultancy that advises on the treatment of pollution and other land-management issues; waste management; renewable energy; the development of environmental technologies that promote energy conservation and greener outputs of manufacturing; and promoting the tourism, leisure and recreation potential of the countryside.
- 5.38 In this respect, tourism features as a prominent contributor to the environmental economy as an export income, but in a sense whereby the continued success of tourism is reliant upon the continued quality of the environment.
- 5.39 With a more specific reference to the relationship between tourism and the environment, several studies have been conducted which seek to determine the economic impact of tourism within sensitive environments. These include:
- the RSPB's examination of visitor spending within Reserves and local economies (2002). This report concluded that RSPB Reserves directly support more than 1,000 FTE (full time equivalent) jobs within the UK. Exploring the wider field of the landscape protection zones, the report suggests that nature and wildlife tourism supports in the region of 18,000 FTE jobs;
 - the Friends of the Rivers of Alde and Ore Economic Survey, which included a detailed survey to establish the different users of the river, and their expenditure profile;
 - the RSPB's 'Valuing Norfolk's Coast', which identified certain characteristics of visitors and their spend patterns, and applied this to an economic impact model. The main results of this study are explored in Section 6 under 'Valuing Norfolk's Coast'; and
 - other AONBs which have commissioned specific tourism economic impact assessments, all with the purpose of defining the importance of tourism as an activity that helps sustain the local

economy through the environmental characteristics of the area. For the South West, a full series of Economic Impact Assessments have been published by South West Tourism in relation to the region's AONBs, the results of which are as follows:

- the Cotswolds AONB (2003) – 886,000 overnight trips spending £185 million within the local economy, and 22 million leisure day trips generating £226 million in spend. Combined this supports 8,356 FTE's (full time equivalent jobs).
- the Mendip Hills AONB (2003) – 89,000 overnight trips spending £15 million in the local economy, and 3.2 million leisure day trips generating £29.5 million in spend. Combined this supports 581 FTE's.
- the South Devon AONB (2003) – 270,000 overnight trips spending £54 million in the local economy, and 2 million day trips with a spend of £40 million. Combined this supports 1,774 FTE's.

The Environmental Costs of Tourism

- 5.40 Whilst the recognition of the value of the environment has grown apace, tourism can only be seen to be a compatible economic activity if visitor behaviour does not detract or damage the very environment it claims to rely upon.
- 5.41 Some commentators equate tourism to the process in which 'people seek out unspoilt places and spoil them'. In such instances, tourism can quickly become an unsuitable activity, effectively cancelling out its ability to encourage preservation and conservation against other uses.
- 5.42 The fundamental costs of tourism on the environment can be summarised within the following categories:
- the direct impacts of visitors and their interaction with the local environment;
 - the induced impacts of visitors, as a consequence of an increase in the use of resources at the destination; and
 - a global perspective of the contribution of tourism to environmental change.
- 5.43 These environmental costs are explored further below.

Environmental Impacts derived from Visitor Behaviour

- 5.44 Although there is a strong relationship between special protection areas and the tourism and leisure sectors, in recent times a few agencies charged with the management of both AONBs and National Parks have identified conflicts caused between visitor behaviour and protecting the natural

environment. A key issue being that rather than helping to preserve sites, visitor activity actually creates additional pressures on the environmental fabric of the countryside.

5.45 The main effects of this activity includes:

- damaging or disrupting ecosystems:
 - *the reduction, through trampling or picking, of important vegetation that is unique to the area, and/or which provides a vital component of the stability of the ecosystem, particularly in the case of sand dunes;*
 - *the disturbance of feeding and breeding patterns of species supported by the habitat/ecosystem, through inadvertent noise pollution and/or through activity which takes place too close to ecosystems; and*
 - *the destruction of nesting sites through activity that has direct contact with ecosystems, which could result in the death of un-hatched species or younglings, or which prevents nesting in subsequent years.*
- soil erosion and compaction:
 - *decreasing the quality of soil by encouraging the loss of nutrients which can result in discouraging species growth;*
 - *limiting many soil functions including its capacity to remove contaminants from the environment by filtration and absorbing materials;*
 - *slowing water infiltration to soil, and therefore starving some plant species of a key resource for their growth;*
 - *increasing the volume of surface runoff, thus accelerating water erosion and the loss of top soil and nutrients; and*
 - *impacting on the natural defences of landscape from other erosive/damaging forces, particularly in coastal areas where the impact of the erosion of sand dunes, for example, can have serious consequences on the natural sea coastal defence systems, or the un-natural shifting of the dunes themselves.*
- localised pollution:

- *petrol/fuel spillages, particularly from motorised water-vehicles which can effect the quality of the water, damage vegetation, and destroy elements of the food chain that supports local fish colonies, for example;*
 - *fume pollution/smog, which can be a prevalent problem during busy summer periods when gases mix with high condensation/moisture; and when high pressures prevent the pollutants being mixed with the fresher air aloft and being transported away, and therefore trapping pollution near the surface. As well as its visual impact, smog also has certain linkages to health problems and/or causing certain poor health conditions (hardened arteries, asthma, and other respiratory diseases). This may not affect the visitors themselves, but it could exacerbate problems experienced amongst local residents;*
 - *noise, from transport or from the visitor's own frivolity. This can create a high level of disturbance for species nesting within the vicinity; and*
 - *litter, which is generally unsightly, but certain items can also be consumed by, and/or harm, local wildlife.*
- 5.46 It should be noted here that tourists rarely set out to deliberately create a management problem for the areas which they visit. Much of the damage is often caused through sites exceeding visitor capacity levels; or whereby lack of knowledge, understanding and/or guidance can lead to visitors straying into areas that they should not be in, and/or participate in activities that are ultimately detrimental to that site; or they are simply compounding problems that already exist.
- 5.47 This latter point is particularly relevant. Many of the impact causes and consequences to the environment highlighted are actually problems that exist due to all human interaction within the environment, and not just visitors. For instance, damage and disruption and localised pollution can be caused by local residents (i.e. from people within the AONB and from nearby settlements) as much as tourists, if not more because their impacts are based on consistent and frequent use; likewise soil erosion and compaction is much more likely to be caused by heavy machinery use from construction and farming activities.
- 5.48 Nevertheless, visitor presence does tend to exacerbate these problems. A key issue here is that the most popular 'visitor' or 'honey pot' areas also tend to be the most environmentally sensitive.

Environmental Impacts Induced by the Tourism Sector

- 5.49 Visitors act as temporary residents during their stay at a destination. As a result, tourism is inextricably linked with the use of a variety of services and infrastructure facilities that aim to serve the locality; or viewed another way, visitors actually demand and compete for resources that are, by rights, paid for by the community, for the purpose of serving the community.

- 5.50 The consequence of this competition for resources is detailed further in the 'Community Impacts of Tourism'. However, this competition also has environmental implications, namely:
- Increased traffic congestion, and the problems of air pollution and smog that this causes.
 - Increased waste production, therefore impacting on the level of refuse that needs to be collected and disposed of. From a local perspective, waste production and disposal can have implications regarding water quality, air quality and health.
 - Increased energy consumption and use of utility resources (electricity, gas, water, sewerage), again due to the volume of visitors and their need for basic essentials (such as hot and cold water, lighting and heating). New demand for certain 'home comforts' (entertainment facilities, cooking facilities, refrigeration, air-conditioning, power showers and so forth) is increasing consumption demand from tourists in particular.
- 5.51 Whilst the actual consumption of utilities, and the impacts this has, is considered as a more global issue, the provision and maintenance of its infrastructure is very much localised. Likewise, some of the impacts can be observed at a local level, such as the degrading of water quality, and increased effluent discharge. Therefore, this needs to be considered as an environmental cost to the locality, as well as a potential source of conflict between the local community and visitors.

A Global Perspective on Tourism & Environmental Change

- 5.52 Tourism travel, particularly to a destination but also within the destination, is regarded as a major resource-depleter and polluter. This is because the more popular forms of travel (planes and automobiles) are major consumers of fossil fuels and therefore release high volumes of greenhouse gases into the atmosphere.
- 5.53 Evidence suggests that greenhouse gases are a major contributor to global warming, which in turn is being linked to a wide range of issues affecting the environment, both at a local level (reduction in breeding of certain species, which in itself is impacting on the sustainability of other species through the food chain); and of events that have major consequences that reverberate on a global scale (changes to weather patterns, droughts, rises in sea level, and increased hurricane activity and hurricane strength).
- 5.54 Whilst it is appreciated that greenhouse gas emission is a world-wide issue, there are increasing calls for the travel and tourism industry to accept responsibility for its own impacts, especially directed towards the air and car travel that tourism promotes. To act as a guide, one person travelling from Aberdeen to Norwich by plane is estimated to produce 0.17 tonnes of CO₂; whilst one car travelling approximately 500 miles generates 0.15 tonnes of CO₂ (source: climatecare.org).

- 5.55 As a result, the effects of visitors are increasingly being viewed in terms of their impacts on a global level as well as at a local environmental level.

Tourism & the Rural Community

- 5.56 Historically, the impact of tourism on the community has received scant attention in comparison to the financial aspects, and more recently, the environmental implications of tourism.
- 5.57 However, the evolution of the terms 'sustainable development' and 'sustainable tourism' have resulted in the inclusion of social and community related issues with regards to identifying the consequences of tourism. Indeed, the social and environmental aspects are now jointly recognised by many as the two main motivations behind calls for the development of a sustainable tourism sector. In the same way that tourism needs to reflect the sensitivities of environmental resources, the impact of tourism behaviour and movement needs to be sympathetic to the community in which it interacts.

Visitor Benefits to Community Welfare

Positive Social Interaction

- 5.58 Visitor presence within a destination brings increased social contact between host residents and the visitors themselves. Whilst rarely referred to, or used as a measurement of impact, anecdotally this can result in a positive experience for both local residents and visitors alike.
- 5.59 Tourism promotes the interaction of people who may have different cultural backgrounds, or who reside in different environments. In the case of AONBs, it is likely that many visitors choose a destination that offers guaranteed quality environments in order to experience a sense of escapism. Particularly, city dwellers like escaping their place of residence in search of cleaner air, greener landscapes, open space, and a sense of rest and relaxation.
- 5.60 During their stay, visitors naturally interact with local residents, be it shopkeepers, accommodation or attractions staff, site wardens, or just members of the public friendly enough to stop and chat. The benefit of this interaction comes in the form of the imparting of information, knowledge and stories. During this interaction, visitors can gain a unique insight into the destination, which they would perhaps not have discovered by other means, and which ultimately can enhance their experience. For the residents, this interaction can give them a sense of pride about the community in which they live.
- 5.61 Whilst the nature of this type of benefit is difficult to quantify, much of the anecdotal evidence can be translated through visitor perceptions obtained through quantitative and qualitative research methods (friendly atmosphere, welcoming, etc.).

Volunteering

- 5.62 A key result of the positive interaction between tourists and local residents is that it can help to motivate volunteering. This is a crucial aspect of many conservation organisations within the UK, with:
- the National Trust having 43,000 volunteers (national figure); and
 - the RSPB having 12,000 volunteers (national figure).
- 5.63 On a more local scale, the Norfolk Wildlife Trust has 1,000 registered volunteers.
- 5.64 Most of these organisations rely as heavily on volunteers to undertake necessary work programmes and projects as they do on full time staff.
- 5.65 This level of volunteering is in addition to those who support local attractions, tourist information points, and/or act as unofficial wardens at specific sites of interest in a non-official capacity.

Securing the Provision of Local Amenities

- 5.66 Demand for amenities from tourists can have a number of positive effects which benefit not only the tourists themselves but also local residents. For instance, custom derived from tourists can often result in longer shop opening hours, a more diverse product range in shops (widening choice) and sustaining a range of important amenities.
- 5.67 It can be difficult to attribute a weight to the value of the sales from visitors in maintaining the viability of rural amenities such as a local post-office, pub, or bus route. However, there is a general consensus that many amenities may become economically unviable if they were to become solely reliant on the local market.
- 5.68 Whilst this is obviously coupled with economic benefits, the value of these services to community life and welfare should not be underplayed, particularly in rural areas which suffer from social deprivation; have high levels of mobility problems; and have below average household incomes. As such, the value of visitor spend contributions in terms of supporting and securing local amenities goes beyond purely being an economic measure.

Local Employment

- 5.69 As with securing local amenities, the value of tourism in generating and supporting employment should not be measured purely in relation to sustaining rural economies, but also in securing and promoting the welfare of the local community.

- 5.70 With the decline of employment in both agriculture and fisheries, communities themselves can become destabilised as the labour force moves away to seek employment. As mentioned previously, tourism can be used as a mechanism for encouraging employment opportunities and for the retention of the labour force, and particularly for the continuation of traditional or local activities.
- 5.71 This can help to retain the presence of younger generations and families, which is widely recognised as being key to ensuring the sustainability of rural communities in the long-term. In addition, employing a local workforce minimises economic leakages by allowing the tourism income generated to circulate within the community.

The Disbenefits of Tourism to Rural Communities

- 5.72 There are a series of potential disbenefits of tourism for the local community, including visitor nuisance, traffic congestion, and increased pressure on local resources. These are explored in greater detail below.

Traffic Congestion

- 5.73 With ever increasing levels of car ownership, the UK's road network is coming under substantial strain.
- 5.74 In rural areas that have low levels of trunk roads, traffic congestion can be a key concern. This is particularly true if the area also has a high appeal to tourists and day visitors, with the peak tourism season bringing in an influx of traffic volume that often exceed the capacity of roads and junctions. In these instances, it is not uncommon to see cars on quite rural lanes queuing nose-to-tail, especially at weekends, on bank holidays and during the school summer holidays.
- 5.75 This problem can certainly result as an irritant to the visitors themselves, and may be of sufficient severity to deter repeat visits. In terms of the local population, their daily activities can be greatly disrupted, from a routine trip to shops, to an important trip to a doctor or the hospital. Traffic congestion can therefore be a major cause of community-visitor conflict.
- 5.76 The problem could be addressed through widening existing roads and building new roads for example. However, this is not a simple solution, with such measures often met by vociferous objection. This includes objections from the local community whose reasons revolve around not wishing to see the character of their area affected in order to appease the situation. Moreover, road improvements can actually lead to an increasing of capacity, which can ultimately spur further road use. Perhaps the most obvious example of this is the various widening schemes of the M25, although this has been mirrored on all different types of roads across the UK.
- 5.77 Traffic can also be seen in other negative terms, including speeding, increased accident levels, problems of parking and increased levels of parking in undesignated areas, and an over-proliferation of signage.

Increased Pressure on Local Resources

- 5.78 As mentioned in the environmental section of this report, visitors can be seen by local residents to be utilising resources and/or reducing the effectiveness of resources to meet the demands of the local population.
- 5.79 The sheer volume of visitors in certain locations can create pressure on resources that are designed to serve the local community. It cannot be assumed that increases in population numbers caused by tourism equates to a corresponding increase in resource utilisation. This is because visitors are only temporary, and therefore their impacts are isolated to a short period of time.
- 5.80 Nevertheless, visitors require and use the same water, energy and sewerage infrastructure as residents. In addition, the sheer numbers and concentrated period of time that these resources are needed means that the infrastructure in rural areas can come under severe pressure. The need for infrastructure upgrades and repairs to cater for the increased demand can often lead to further disruption to residents through works conducted in the off-season.
- 5.81 Although it is difficult to apportion an actual cost in relation to the necessary up-keep of these facilities, residents can feel a certain amount of animosity towards visitors due to the fact that the funds for infrastructure maintenance and improvements is derived from their council tax contributions.

Visitor Nuisance & Crime

- 5.82 Growth of mass tourism can be accompanied by increased occurrences of complaints regarding nuisance and disturbance, and also in levels of crime, with the victims being both visitors and residents.
- 5.83 The presence of a large number of tourists can lead to several nuisance behaviours, ranging from peering into windows of residencies that have architectural interest; revelry associated with late night partying; high-jinx pranks; and heightened levels of noise. Whilst individually these appear to be fairly minor incidents, the collective nuisance factor created by high volumes of people in one place at the same time can be a considerable problem for many residents.
- 5.84 Just as concerning is crime. Visitors are known to be targets of petty theft, due to the belief that visitors carry various valuables with them, i.e. money to spend, cameras and jewellery. This type of crime is called 'host upon visitor' crime. Conversely, trespassing, for example, is often a reported consequence of visitor intrusion onto private land is a problem in mainly rural locations. This is an example of 'visitor upon host' crime.
- 5.85 An increase in crime at peak tourism times may suggest that there is a relationship between the high tourism season and crime. However, the data will need to be analysed in detail to determine the types

of crime being reported, the level of crime, and where the victims reside in order to obtain a true reflection of the situation, and whether there are other factors involved.

Changing Emphasis of Local Amenities and Provision

- 5.86 A consequence of the support that tourism brings with reference to local amenities and provision is in the fact that the provision itself can change its focus to reflect the needs of the visitor rather than the needs of the local community.
- 5.87 This can become apparent through a number of factors including artificial rises in the price of amenities and goods during the peak tourism season; and a change of emphasis of goods on sale whereby the stock accentuate specialist, more up-market produce sought by visitors rather than every-day, value goods required by local residents.
- 5.88 This can be a source of frustration for the local community, and can lead to certain misgivings in relation to the true motivations behind businesses that claim that tourism benefits local residents.

Second Home Ownership

- 5.89 The growth of second home ownership is one of the fundamental issues facing many rural communities, particularly within environments of high landscape value such as an AONB.
- 5.90 Second home ownership is perceived as having a strong relationship with tourism, in that:
- high levels of visits prompt the purchase of homes for business reasons, i.e. to be let for self-catering purposes;
 - tourism trips made to destinations initially motivates the desire to purchase a property by introducing potential owners to the qualities and characteristics of the area; and
 - it has a strong and visible association with 'holiday parks', with many second property owners having purchased static caravan units.
- 5.91 However, the role of and effects of tourism are strongly contested.
- 5.92 Proponents of tourism within the AONB point to the fact that second homes defined as self-catering units form part of the tourism plant within the area. Therefore, they have a specific contribution to make in terms of supporting the wider economy through encouraging tourists and tourism spend to the area.
- 5.93 Moreover, in rural areas of restricted employment opportunities, there is a suggestion that if the homes were not sold as second homes, many of them would not be sold at all.

5.94 However, opponents, particularly referring to houses and flats rather than static caravan units, state that the impact second home ownership is having on the local community is very destructive. This includes:

- house prices being inflated to a point which is beyond the reach of residents who have lived in the area for generations, with younger members having to leave the area in search of more affordable housing;
- this in turn results in a loss of the sense of place and community, as original members of the community leave. The term 'Ghost Village' is often used to describe areas with a high percentage of second homes; and
- a reduction in the welfare of the community as second homeowners tend to make less use of local services, including shops and Post Offices, schools, health services, and public transport, all of which undermines the financial viability of the community.

5.95 There is an understandable association being drawn between tourists and second home owners, and the negative impacts that this has. Nevertheless, there are certain characteristics and traits that need also to be taken into consideration. In relation to private ownership, this includes:

- Only part of the decision making process is driven by tourism ideals, with other factors such as investment and family altruism also believed to be key considerations. Even the desire to have a garden and spend time gardening can be a driver behind purchasing (noted for a small percentage of static unit purchasing in Wales).
- The financial commitment undertaken is fairly substantial as an initial outlay, but is also continuous due to paying land rental and services charges (Holiday Parks), or local council tax (houses/flats).
- Usage can be on a very regular basis, with visits made as much as every weekend, suggesting the second home becomes a place for casual time, with the primary home a habitat used whilst working. In this way, the second home can be viewed as an extension of their primary habitat. This property then becomes a 'usual' environment to the owner, and thus changing the dynamics behind a visit.
- Whilst official classification may be 'second home', usage of the property is actually self-defined. In some instances, second homes can actually become a permanent place of residency. In the case of holiday parks, these users are defined as 'stay-putters'.
- The actual behaviours of second home owners are more likely to mirror those of actual residents, in terms of using local services and facilities such as pubs and restaurants.

5.96 Overall, therefore, there is sufficient evidence to suggest that a second home for private use has its own unique set of characteristics and behaviours. It can neither be considered as tourism as it can act as a place of 'normal environment' from the perspective of the owner; but nor can it be classified as a permanent resident because their behaviour is not consistent, and they have less propensity to use local facilities and services.

Summary

5.97 This section has highlighted a number of costs and benefits of tourism to destinations, particularly with reference to rural and/or sensitive environments and communities.

5.98 There is no question that tourism brings economic benefits, particularly in relation to bringing in new spend to help sustain the economy and prosperity of the local community. Moreover, evidence suggests that this spend is closely associated to the quality of the natural environment in protected areas; and the welfare of local communities, with the spend supporting jobs, amenities, and in turn sustaining the local population.

5.99 However in light of more recent research, tourism can no longer be referred to purely in such beneficial terms. As with many forms of economic activity, tourism too can have its disbenefits, including whereby visitor activity can damage the very fabric and sense of the place that the tourism sector depends upon. In particular, tourism can:

- create undue pressure on the natural environment, particularly areas that need to be preserved because of their importance as a wildlife habitat;
- force capacity levels of local infrastructure to be exceeded;
- disturb and inconvenience local residents through increased road traffic, crime, public disorder, and littering; and
- be an initial motivator towards the purchase of a second property, which can result in a breakdown of communities where houses and flats are involved.

6 The Impacts of Tourism on the Norfolk Coast AONB

- 6.1 The Overview of Tourism Impacts described some of the more generic indicators used to define the overall effects of tourism on a destination. The following section aims to place these impacts and effects within the context of the Norfolk Coast AONB.
- 6.2 The first part of this section of the report summarises studies that have already been completed which help to define some of the tourism impacts within the AONB, and identifies initiatives which have been introduced either to measure their impacts and/or effects, or encourage more effective management of visitors and their movement.
- 6.3 The second section aims to determine the impacts specifically relating to the Norfolk Coast AONB, based on evidenced and/or anecdotal experiences. To complete this, a number of organisations (Land Managers, English Nature, the Norfolk Wildlife Trust, RSPB, National Trust, Norfolk County Council, EETB) have been consulted. This was with the aim of determining their organisation's own interests in the Norfolk Coast AONB in relation to tourism, and whether they have details of the specific impacts, either positive or negative, that they personally gathered, or through information that their members/contacts have passed to them.
- 6.4 Furthermore, a key aspect of the workshops held at Phase II of the study programme was to identify the significance of any impacts noticed, and to test whether this view was shared by all within the area or just by those who have a vested interest in those specific impacts, whether they are positive or negative. To ensure this section is comprehensive in its assessment of these impacts, the findings from this element of the workshops are included here.

Studies that Help Define Tourism Impacts in the AONB

- 6.5 The consulted organisations often referred to the RSPB's 'Valuing Norfolk's Coast'; the NCP's own Visitor Management Strategy; and more generalised publications which have examined this subject in other areas of sensitivity. The basic comment is that there is little in the way of empirical evidence, particularly relating to the environmental and social costs of tourism.
- 6.6 In the following section, the relevance of this evidence to the current situation within the Norfolk Coast AONB is examined; any gaps in information identified; and recommendations highlighted where further investigation or information may be required to present a more holistic perspective.

Norfolk Coast Visitor Management Plan - 1995

- 6.7 The Norfolk Coast Visitor Management Zoning Plan (see Appendix A1) highlights the key elements of the Norfolk Coast Visitor Management Strategy 1995.

- 6.8 One of the fundamental outcomes of the Visitor Management Strategy was a management-zoning system, whereby the AONB was divided into zones according to varying degrees of environment/habitat sensitivity and visitor pressures, and therefore leading to one of six different visitor management priorities.
- 6.9 A key aspect of this study was that it highlighted through identifying Red and Orange zones, the areas of greatest sensitivity, namely the areas covering:
- Holme Dunes National Nature Reserve,
 - Holkham Dunes National Nature Reserve,
 - Blakeney National Nature Reserve; and
 - Winterton Dunes National Nature Reserve.
- 6.10 These are defined as the most fragile wildlife habitats in the AONB, and yet are under considerable visitor pressure. Within these areas, the strategy denotes a strict management technique of not promoting to visitors, and the reduction of parking.

Wash and North Norfolk Coast European Marine Site

- 6.11 The Wash and North Norfolk Coast European Marine Site (EMS) includes a specific section on tourism and tourism impacts within its Management Scheme. This covers the area from Holme/Snettisham to Blakeney/Cley within the AONB.
- 6.12 The scheme denotes that whilst tourism has the potential to bring economic benefits to the community, the nature of tourism means that it could have detrimental consequences for the environment, its habitats and ecosystems. To reinforce this sentiment, the scheme highlights a list of potential causes of visitor damage and disturbance, and the effects that these cause:
- Aircraft – a key concern is the impact of light leisure craft, particularly due to the significant types, concentration, and the sensitive nature of the local bird populations. The noise and visual impacts of aircraft can create high levels of disturbance during breeding and feeding, as well as being a deterrent to nesting.
 - Beach/Dune/Shore Users/Dogs/Cyclists - Walking, dog walking, cycling and horse riding have been observed to cause trampling/erosion of saltmarshes and damage to sea defences, in addition to disturbance of wildlife.

- Vehicles - Land-based motorised vehicles (quad bikes, motorbikes, 4x4) have been observed in Snettisham, Titchwell, Holme, Winterton. However, the Scheme highlights these activities as being incompatible with the needs of EMS features.
- Water Sports – The area is popular with some forms of water-sports, with motorised boating a popular leisure activity around Snettisham and the North Norfolk Coast; water-skiing and Jet skiing have been noted at Blakeney, Brancaster Staithe, Holme, Morston Quay, Wells-next-the-Sea; plus sailing, windsurfing, canoeing/kayaking, with launches across North Norfolk Coast harbours and beaches. However, all of this activity has the possibility of disturbance, from disrupting seal colonies, to loss of feeding and breeding areas due to moorings, and damage to saltmarshes, as well as more general disturbance of local wildlife.
- Wind Sports – this includes kite flying and more recently kite-powered board surfing, which is popular at Holme and Brancaster. Whilst yet to be fully investigated, the possible impacts include the disturbance of local wildlife feeding and breeding patterns.

6.13 The benefit of this EMS Management Scheme is that it has laid the foundations for monitoring visitor behaviour by actually defining the key consequences and the causes of visitor impacts on the natural environment.

6.14 Subsequently, a standardised form has been produced to help wardens record and monitor the level of impacts. This information has been collected and analysed by the EMS Conservation Manager (see Visitor Behaviour Observations).

Norfolk Coast Transport Strategy & Community Forum

6.15 Traffic was highlighted in the original Visitor Management Strategy as being one of the most important issue associated with the management of visitors within the AONB.

6.16 This in turn gave rise to the Norfolk Coast Transport Strategy. The key principles of the Strategy are highlighted in the 'Norfolk Coast Management' section of Appendix A1.

6.17 According to the Norfolk Coast Partnership's Community Conference on Transport (2002), the key issues surrounding traffic and tourism manifests itself as:

- volume, particularly concentrated during the peak tourism season;
- accidents and the perceived increase in accidents when traffic is at it highest;
- speeding in and around villages;
- parking, and the problems of parking space for local residents when traffic is at its highest;

- limited opportunities for walking and cycling; and
- an over proliferation of directional signage.

6.18 Research conducted by Norfolk County Council suggests that some of the problems are being inadvertently exaggerated, and are more of a perceived than actual problem. Their research suggests that:

- the actual volume of traffic along the main coastal road (the A149) is less than its threshold, and is only increasing at a rate of 1% per year;
- in comparison to 1999, the speed of traffic was observed to have fallen in 2001 in Titchwell, Holme and Morston;
- the area has in excess of 350 miles of cycling routes alone, with many routes away from the A149;
- the proportion of traffic accidents along the A149 remained fairly consistent between 1996 and 2001 of between 20-30 reported incidents per year. No specific clustering of accidents has been observed; and
- overall, there are an estimated 15,000 designated car-parking spaces along the Cromer to Hunstanton route. According to research conducted by the County Council, on a sunny August Bank Holiday in 2000 only half of these spaces were actually used.

Understanding the 'Traffic' Problem

6.19 As mentioned in the 'Norfolk Coast Management' section of this report, a number of initiatives have come from the Norfolk Coast Transport Strategy, including:

- A self-sufficient coastal bus route, whose patronage includes a high proportion of visitors to the area;
- An increased number of walking and cycling routes, publicised and waymarked for ease of use; and
- Coupled with this, the introduction of a pilot 'Quiet Lanes' initiative whose use is targeted at cyclists and walkers and whereby drivers are requested to proceed with caution.

6.20 Despite these measures, the rise of traffic during peak tourism periods remains one of the key complaints of both locals and visitors alike.

6.21 On the basis of the evidence provided by Norfolk County Council, the increase of traffic and its perceived impacts from a local community perspective is an area that needs further investigation. As such, Scott Wilson has endeavoured to identify some key measures that illustrate the impact of traffic and how any negative perceptions may manifest itself. This is explored further within the 'Actual Impacts on the AONB'.

Valuing Norfolk's Coast – 1999 (RSPB)

6.22 This RSPB led study, which was supported by key stakeholders in tourism within the AONB including the Norfolk Coast Partnership, provided a detailed analysis of the economic benefits of tourism associated with the wildlife attraction/appeal of the coast.

6.23 The research included a visitor survey that was administered during August and October, 1999, at Blakeney, Cley, Holkham, Morston, Snettisham, and Titchwell, all of which are key Nature Reserve sites within or around the AONB. A total of 1,759 questionnaires were completed, with the actual party composition of the respondent equalling 5,076 visitors.

6.24 Specific questions were included that examined the spend characteristics of visitors. The survey concluded that:

- the average spend per overnight visitor in 1999 equated to £22.60 per day, with the average spend per trip being £113.97 per trip.
- the average spend per day trip from home (local) was £6.48 per visitor, and £9.69 per holiday maker on a day trip (i.e. staying outside of the study area).
- the main spend categories are accommodation (43% of spend), food and drink (30%) and travel and petrol (11%); and
- only 4% was spent on entry fees to attractions, with a further 7% spent on shopping.

6.25 The significance of the nature and wildlife to tourism in the AONB is reinforced by the fact that it formed the main motivation behind the visit by around 30% of respondents. The quality of the scenery, and the peace and tranquillity of the area also featured highly as key motivations, as do the beaches, but in comparison to birds and wildlife they each contribute a further tenth of visits to the area.

6.26 In terms of actual sites, the appeal of birds and wildlife was found to be highest amongst visitors to Cley (75%) and Titchwell (63%), and therefore the visitor spend attributed to this activity is much higher within these areas (£56.34 & £28.54 per trip respectively). Walking was a much higher consideration for visitors to Morston (50%), Holme (46%), and Blakeney (45%).

Assessing the Economic Impact

6.27 The Economic Impact Assessment element of the study utilised the Cambridge Model, developed to allow the calculation of the local value of tourism. The main data which comprised the key elements entered into the survey were as follows:

- 1.5 million staying trips were made within the two districts, of which 86% were for holiday purposes.
- 36 million leisure day trips were taken in the area, including those taken by local residents.
- The study area contained an estimated 1,900 serviced bedspaces (hotels, guesthouses, B&Bs and Inns), 500 self-catering cottages, and 1,750 static and touring caravan pitches. This represented a quarter and a third of total stock within the two district council areas, Kings Lynn & West Norfolk and North Norfolk.
- There were 54,000 residents within the study area, with around 54,000 visits to friends and relatives (VFR) as a result.

6.28 From this, it was deduced that:

- **400,000** overnight tourism visits were made to the study area, 345,000 of which were for holiday purposes.
- A further **7.7 million** leisure day visits were also made to the area, 5.7 million from local residents and an estimated **2 million visitors coming from outside the area.**
- Altogether, it is estimated that these visits generated a combined spend value of **£122 million**, with overnight visitors derived from holidays contributing £44 million, and day visitor spend contributing £71 million.
- This was estimated to have generated a further **£18 million** (a multiplier of 1.148) in turnover for local suppliers and producers within the study area (i.e. indirect and induced spend).
- This spend in turn is estimated to have supported 2,325 FTE jobs within the study area, 1,830 directly involved in the tourism sector, with the further 495 jobs as a result of the indirect or induced spend as it filters through the economy.

Appraisal of the Study

6.29 A fundamental conclusion of this study, which still has pertinence to the Norfolk Coast AONB today, is the fact that a large proportion of visitors interviewed suggested that the appeal of the birds and wildlife

was a significant contributing factor to their decision to visit the area, particularly at Titchwell and Cley-next-the-Sea.

- 6.30 It should be noted that the sample has a bias towards these types of visitors because of the sampling locations, which were Nature Reserves and thus have a particular slant towards bird watching. However, the survey at the very least it provides an indication as to the types of visitors attracted to the more sensitive locations identified in the Visitor Management Strategy. At best, it reinforces the notion that the visitors to these locations value the unique and specialist opportunities for leisure provided within the AONB (bird watching, beach activities and coastal walking) above all others.
- 6.31 In addition, the study also denotes that the visitor volume and value within the study area is considerable, supporting a significant number of employment opportunities in an area which has limited employment sectors. As previously mentioned, the spend information is now somewhat out of date, with spend values in 2003 considerably higher than those recorded within this study. We acknowledge the Partnership's desire to up-date the economic impact assessment, and to include the total AONB area. In the absence of a more robust study, Scott Wilson has applied its knowledge of the local accommodation and attraction stock, and its appeal as a day visitor destination to some basic economic model principles. The results of this study are highlighted in later in this section (see *Overview of the Volume and Value of Tourism within the AONB*).

AONB Studies

- 6.32 As part of the study process, other AONBs have been consulted with reference to their observations of tourism behaviour and impact.
- 6.33 Overall, and with the exception of Tourism Economic Impact Assessments, there have been no other specific studies which examine the extent to which certain visitor impacts are present within the AONB. Nevertheless, all of the AONBs reviewed demonstrated a knowledge that certain impacts occur. The following highlights certain AONBs which help to define certain concerns with reference to visitor behaviours, and measures that are included within the Management Plan.

The Cotswolds

- 6.34 The Cotswolds AONB highlight the fact that the AONB attracts very large numbers of visitors during the year, and is expected to continue to do so. At particular locations (such as popular towns, attractions and viewpoints) and at particularly busy times, there is a suggestion that the sheer weight of numbers causes congestion and inconvenience for local residents and visitors, which in turn has a negative consequence on the character of the AONB.

6.35 The AONB highlights the need to promote sensitive and sustainable tourism and recreation, whilst also identifying the need for this activity to protect sensitive areas. Specific policies of the Cotswold AONB include:

- Monitor tourism and visitor trends and identify the contributions of different types of tourist and recreational users to the economy of the AONB.
- Work with the tourism industry to introduce a Green Tourism initiative for the AONB, advocating sustainable practices in the running and operation of tourism enterprises.
- Introduce a voluntary visitor contribution scheme to raise awareness of the link between the high quality landscape of the AONB and the tourism industry, and enable visitors to contribute directly towards the conservation and enhancement of that landscape.
- To work more closely with the tourism industry in the development and application of viable and sustainable tourism principles, in order to support its economic importance and ensure the long-term well-being of the natural asset upon which most of the tourism industry is based.

The Quantock Hills AONB

6.36 The Quantock Hills AONB have recently conducted a visitor survey which shows the majority of the heavy recreational use in the AONB takes place in the sensitive upland core based on parking areas on or adjacent to Quantock Common.

6.37 A key concern is that public transport to these sites is not available, with visitors driving to the sites, stepping out of their cars, and interacting directly with a sensitive Site of Special Scientific Interest where wildlife disturbance and potential for erosion is prevalent. In response, the AONB has taken the deliberate policy of not actively promoting the sensitive Quantock hilltops as a tourism destination, to prevent visitor numbers becoming damagingly unsustainable.

6.38 In addition, the survey suggests that 75% of its visitors are on day trips; they tend to arrive by car; generally by-pass the local settlements; and as a result have low propensity to generate spend in comparison to other attractive rural areas. This is regarded to be a detrimental aspect of current visitor behaviour.

6.39 Other key policies of the AONB include:

- To protect the sensitive hilltop commons from damaging pressures while accommodating public enjoyment of the AONB particularly where this supports the local economy.
- To deflect some visitor pressures from hilltop sites while protecting the interests of local residents.

- To monitor visitor trends and activities.

6.40 The AONB is seeking to commission a study of a number of tourist attractions to identify the effect that these have on attracting visitors to the area with a view to developing constructive partnerships with these attractions, particularly as information points to disseminate certain messages of the nature, characteristics and sensitivities of the AONB to visitors.

Northumberland Coast AONB

6.41 Visitors to the Northumberland coast are recognised as both a vital resource, but also as a pressure on the unique assets of the coast.

6.42 The Management Plan highlights that the visitor expenditure does much to support the local economy. However, the AONB is also witness to the depth with which tourism spend reverberates around the economy, and how events outside of the control of the industry (Foot & Mouth) can have a devastating impact on the welfare of the community.

6.43 The AONB is currently in the process of conducting its own visitor survey, the results of which will feed into a sustainable tourism strategy. This research included questions regarding certain aspects of 'greening' the tourism offer. The full report is not available for inclusion within this report, however early indications are that:

- The majority of people felt that they try to be environmentally sensitive when they go on holiday and that low impact tourism should be encouraged.
- There is a high level of visitors agreeing that they would be willing to undertake activities or purchase products that are associated with better care for the environment – the purchase of local produce and staying in accommodation [that employ environmentally sensitive practices] were rated as the top factors.
- A high proportion of visitors state that they would be willing to use public transport during their trip.
- A high proportion of visitors said that they would be willing to contribute to some form of an environment improvement initiative.
- The vast majority of visitors state that they were willing to walk or cycle more.
- More information provision, and more frequent public buses and cheaper public transport were highlighted as areas that could be improved.
- Recycling facilities, information and public transport were highlighted as the top elements that would encourage visitors to be more environmentally sensitive.

South Devon AONB

- 6.44 The South Devon AONB is said to provide a popular setting for many different activities. This includes traditional pursuits of walking, hiking, horse-riding, sailing, rowing, angling, beach-going, surfing and bird watching, as well as a growing generation of active and technical pursuits such as mountain biking, coasteering, diving, canoeing, rock climbing, parascending, hang-gliding and kite-surfing.
- 6.45 It is recognised that activities together make a significant contribution to the health and well-being of residents and visitors, and to the viability of the services and businesses of the area.
- 6.46 However, during the preparation of the Management Plan, various views and opinions of the consultees identified a number of negative implications and challenges including:
- Intense recreational pressure at some heavily used sites continues to cause erosion, landscape degradation, damage to habitats and archaeology, and conflict between users. This is aggravated by severe rainwater run-off and coastal erosion. Some popular sites such as Berry Head are at full recreational capacity.
 - There is a commonly held view that some noisy and intrusive recreational activities disturb the tranquillity of the AONB and spoil the enjoyment of others.
 - A minority of inconsiderate people continue to behave inappropriately in the countryside, failing to understand and respect the needs of those who live and work on the land. Trespass, obstructive car parking and the poor management of dogs continue to be a focus of concern.
- 6.47 In response to this, the AONB Management Plan states that amongst its aims in relation to tourism are:
- To attain a high standard of landscape and recreational management, visitor facilities and access opportunities at the most heavily used destinations, concentrating resources and promotion on the sites which are best able to accommodate and contain intensive recreational pressure.
 - To protect the character of remote and tranquil countryside areas and work with land managers and authorities to discourage noisy or intrusive recreational activities.
 - To develop the economic benefits of strategic coastal, estuary and riverside trails and the National Cycle Network through “green tourism” projects.
 - To provide co-ordinated information and interpretation about countryside recreation and access through a range of media, which will help foster a greater understanding about the countryside and a considerate approach to using it.

Actual Evidence of Visitor Impacts on the Norfolk Coast AONB

Environmental Impact - Site Observations

- 6.48 Scott Wilson has investigated the possible effects of visitors on the wildlife through a variety of sources. This includes direct conversations with site wardens, and obtaining data gathered by the Wash and North Norfolk Coast EMS. The following summarises some of the key findings for these key sites.

Norfolk Wildlife Trust

- 6.49 The Norfolk Wildlife Trust manages the Reserves of Salthouse Marsh, Cley Marsh, Holme Dunes and Ringstead Downs within the Norfolk Coast AONB.

Cley Reserve

- 6.50 Currently, visitor pressure at the Cley Reserve is generally felt to be well managed with relatively few problems observed. The main route around the Reserve is via boardwalks. The main emphasis of these paths is to assist visitors to reach the hides which would otherwise be relatively inaccessible.
- 6.51 There are few opportunities for visitors to step-off the walkways, with reed-beds generally either side. As such, disturbance from trampling is relatively limited. Dogs being let off leads is said to be a problem, although a difficult one to manage effectively as people ignore the boards (a problem witnessed during the visit).
- 6.52 The Norfolk Wildlife Trust is to commence development works in the Cley Nature Reserve in the near future. With an overall investment of £2.5 million seeking to up-grade existing visitors facilities, the project is seeking to provide greater protection against damage caused by flooding. A new visitor centre is to be constructed as part of the programme with a café and toilet facilities. The car park is to be repositioned and extended, with the beach car park to be closed. The existing building is to be converted into a permanent education centre.
- 6.53 It is hoped that the whole of the Norfolk Coast will benefit through this project by providing a more detailed means of disseminating information regarding the special protection designations of the coastal habitats.

Holme Dunes

- 6.54 In comparison to Cley, Holme Dunes is under a greater degree of visitor pressure. This is because much of the Reserve is also an open expanse of attractive beach. As such, visits for casual use are much more prevalent.
- 6.55 The site includes a Visitor Centre, and the Trust provides car-parking facilities for a maximum capacity of about 100 cars. Whilst the car park does reach capacity on certain days, it is felt that on its own this

- would present a volume of visitors that could be effectively managed. However, a further 200 spaces are provided by the local Golf Club which provides access to the beach, away from the Visitor Centre itself.
- 6.56 Dog walking, and letting dogs off leads, is regarded as a real problem within the Reserve. Dogs off leads have been observed to have a strong tendency to chase feeding birds and disturb nesting sites, including jumping through cordoned areas.
- 6.57 Other impacts include paragliding and low-lying private aircraft which have been observed to 'buzz' wading roosters; and kite buggies which can prevent waders from feeding. Both of these are a fairly recent phenomenon, and has added to the problem of managing the site.
- 6.58 A particular concern appears to be the increasing level of activity of all types throughout the year, with both Boxing Day and New Year being regarded as new peaks of visitor activity.
- 6.59 In most instances, where wardens are able to intervene, it is found that people are unaware of the effects their actions cause, and agree to behave more appropriately once this is pointed out to them. However, warden time is constrained, and whilst volunteers are used, it is generally on an ad hoc basis outside except in relation to the visitor centre itself. Therefore, inappropriate visitor behaviour is difficult to manage effectively throughout the year due to resource pressures.

The National Trust

- 6.60 The National Trust manages the Blakeney National Nature Reserves and Brancaster Nature Reserve.
- 6.61 Overall, the Trust suggests that visitor pressure on both sites is generally being well managed. As an organisation, their emphasis is based upon encouraging public access in addition to conservation.
- 6.62 The Trust has built a positive relationship with local businesses and the Parish itself to ensure that the economic spend of visitors directly benefits the prosperity and welfare of the local community and environment. In particular, the Trust offer a joint promotion with seal tour companies whereby the fee for the tour will be reimbursed to anyone who joins the National Trust as a result. In addition, a significant proportion (50%) of the car-parking fee for Blakeney Car Park is donated to the Blakeney Parish Council. As such, the Parish directly benefits from visitors to the Reserve.
- 6.63 Furthermore, the Golf Club at Brancaster donates 20% of its net income to the National Trust as its car park is close to the Reserve.
- 6.64 The Trust also run a residential centre at Brancaster, the Millennium Centre, which is available to schools and groups, with both residential and day courses offered to students from year 3 to degree-level geographers and biologists. There are also adult and family courses from weaving and

watercolours to baking and bird watching. This centre provides further income from visitors to this sensitive habitat within the Norfolk Coast AONB.

6.65 The National Trust also organises the Brancaster Commons Committee. The committee, faced with growing use of the beach by kite activities (kite surfing and kite buggying), have established guidelines for use of the beach for this purpose. This includes:

- Prescribing a launch and landing site, particularly related to kite surfing, which is to the west of the golf club; and
- A 'strictly out of bounds' area to the east of the golf club.

6.66 This has recently been revised to include all kite sports, including Kite Buggies. A National Trust byelaw prohibits wheeled vehicles on their part of Brancaster Beach. However, an agreement has been made between local kite-sport clubs and the RSPB whereby buggies are permitted on the west end stretch of the beach close to Titchwell. This agreement is self-regulated by the buggy club, and is subject to a yearly review. The clubs recognise that there is a need for them to work with the interest groups to manage these activities suitably, and that this is preferred (certainly by them) than a complete ban.

English Nature

6.67 English Nature manages, Winterton, Scolt Head and Holkham (a site owned jointly by Holkham Estate and Crown Estates) National Nature Reserves.

6.68 Winterton, which is habitat to breeding Little Terns and Grey Seals, is said to have a reasonable control on visitor impacts. Through an active programme of warden and volunteer intervention, and education, the site has been successful in reducing observed visitor impacts, including levels of disturbance. However, the main observation relates to residents and the observations made by the Winterton Liaison Group, particularly in relation to parking.

6.69 Holkham Reserve is the Nature Reserve considered to be under the greatest pressure through sheer volume alone, with an estimated 750,000 – 1 million visitors per year.

6.70 Altogether, 90% of the Reserve is open access. The size of the Reserve (10,000 acres) means that behaviour is difficult to manage, though most activity spreads from the two main access points, i.e. the car park to the north of Pinewoods Holiday Park in Wells, and the car park opposite the Holkham Estate (Lady Anne's Drive).

6.71 The site also has to cope with a variety of different users and activities, from casual bathing, picnicking, and beach walking; to more specialised activities of horse-riding and certain kite sports. It has been

- observed that some of these activities conflict with other users as well contravening some of the Reserve's environmental conservation objectives.
- 6.72 Boards have been placed at the entrance to introduce the 'Reserve' and the nature and importance of its wildlife, and to highlight some of the behaviours that should be observed (keeping dogs on leads, removing litter, not walking in cordoned areas) in order to protect the wildlife habitats. However, many of the impact observations suggest that a proportion of visitors either have not noticed these boards, or have not acknowledged their importance for one reason or another. New boards are planned to be erected in the near future.
- 6.73 The more obvious effects of this include trampling of the saltmarshes from the Holkham entrance (although scientists suggest that the marshes are still a working habitat); damage to sand dunes; and most importantly adding to the losses of wading wildfowl and nesting birds.
- 6.74 However, whilst there is a feeling that visitor activity has certainly contributed to this loss, it is much more difficult to attribute a proportion of this loss to visitors. This is because the coastal wildlife habitat found in the Norfolk Coast AONB are subject to many influences, from global changes in climate, to the prevailing local weather conditions, changes in habitat composition, and increasing numbers of predators, all contribute.
- 6.75 Nevertheless, it is felt that visitor presence does exacerbate certain situations. Wardens do attempt to discourage inappropriate behaviour through direct intervention where possible. On the whole, the reactions of offenders are generally said to be positive, with a strong suggestion that their conduct is a result of unawareness rather than indifferent attitudes or complete disinterest. However, Holkham Reserve has only two full time staff, with a further two staff only working part time (two weeks out of every four, with the remainder of their time spent elsewhere).
- 6.76 Volunteers are available to assist with managing visitors, collecting impact intelligence and intervening where appropriate. The Reserve relies upon the services of around 12 volunteers on a regular basis. However, the overall volunteer numbers and the resources required to manage their activity is generally considered to be insufficient in relation to the overall size of the site; and in relation to the numbers of visitors it receives.
- 6.77 Ultimately, it is strongly felt that the conservation and wildlife protection objectives of English Nature within Holkham Reserve have had to be forfeited in certain areas, with effort now being focussed on sites where conservation management practices will be most effective and not compromised by visitor activity. This includes the 'harder to reach' sites within the Reserve, and sites which suffer less from visitor activity because of access constraints.

EMS Management

- 6.78 The Wash and North Norfolk EMS quantifies the various observations of visitor behaviour and impacts for the following Nature Reserves within the AONB:
- Holkham National Nature Reserve;
 - Titchwell Marsh Nature Reserve;
 - Scott Head National Nature Reserve;
 - Blakeney Point National Nature Reserve; and
 - Holme Dunes National Nature Reserve.
- 6.79 These observations are collected by the site management and wardens of the Reserves, and through members of the general public with a vested interest in preserving the natural habitats and ecosystems of the Norfolk Coast AONB.
- 6.80 To ensure a degree of consistency in the recording of both the causes and impacts of various user groups, a simple form has been devised to allow site wardens to detail any observations of impacts and the affects that they have on the natural environment. This includes abbreviations for all of the impacts identified in the EMS Management Scheme.
- 6.81 As part of its management programme, the EMS Conservation Manager has collated and analysed these observations for Blakeney, Holkham, Titchwell, Holme and Snettisham (which borders the AONB), with Table 6.1 providing a summary of the combined observations logged at the sites.
- 6.82 Key findings from these observations are as follows:
- Beach/Shore users cause the most amount of incidents within the study areas (29%), a high proportion (9 incidents in every 10) of which are observed to cause some form of damage or disturbance. Regular observations include walking in restricted areas, and ignoring 'No Further' signage.
 - Just under a quarter of all incidents (23%) relate to aircraft activity, with 95% of these causing damage or disturbance to marine/habitat features. Low flying leisure craft, in particular, have been observed to disturb wader, seal and tern colonies within Blakeney.

Observed Incidents										
	Total Incidents	Aircraft	Beach/Shore Users	Bikers	Dogs	Study Groups	Vehicles	Water Sports	Wind Sports	Other
Total Number of Incidents Recorded	499	114	143	5	88	2	23	16	72	37
Activity as a % of Total Incidents		23%	29%	1%	18%	0%	5%	3%	14%	7%
Incidents Causing Damage & Disturbance										
Total Number of Incidents Causing Damage	367	108	128	3	69	0	8	10	23	18
% of Incidents Causing Damage by Activity		95%	90%	60%	78%	0%	35%	63%	32%	49%
Activity as a % of Total Incidents Causing Damage		29%	35%	1%	19%	0%	2%	3%	6%	5%

Source: Wash & Norfolk Coast EMS

- Dog walking activity (18%) and wind sports (14%) also feature quite highly on the incident observations, but whilst observations relating to dogs have a strong relationship to disturbance (78%), wind sports are shown as having a lower correlation to disturbance of marine/habitat features (32%).
- Vehicles (5%), Water sports (3%), and Bikers (1%) all have a low-recorded incidence level. In the case of Bikers and Water Sports, both have a relatively high correlation to disturbance and damage.

6.83 It should be noted that the occurrence of damaging activities varies across the AONB's key sites. For instance, Blakeney (43% of reported incidents) and Holme (25%) appear to be more susceptible to damage and disturbance caused by flying activity. Titchwell (56%) and Holme (47%), in contrast, have higher incidents of damage/disturbance caused by beach/dune/shore users. Incidents caused by water sports were only observed in Blakeney and Holme. However, those caused by wind sports and dog walking were observed on all sites, though observations were highest at Blakeney (26%).

6.84 Site managers suggest that the volume of incidents recorded represents only a small proportion of actual incidents. They suggest that their limited resources mean that it is impossible to log all of the observations, particularly in the summer months when visitor activity is high.

6.85 Please note that the above information relates only to those sites that fall under the remit of the Wash and North Norfolk Coast EMS, which equates to 5 out of the 12 Reserves in the AONB. Other

Reserves and areas of high sensitivity at Winterton and the coastline of the western outlier, do not appear to have any formal means of recording any adverse visitor behaviour or disturbance.

Species Losses

- 6.86 The management difficulties faced within the Reserves along the Norfolk Coast are exemplified by the fact that there has been a noted loss in certain bird species.
- 6.87 According to observations recorded by English Nature, of particular concern are losses to the Little Tern (245 pairs in 2004, down from over 300 pairs in 2001); Sandwich Tern (a low of 3,078 pairs were noted in 2004, compared to 4,600 in 2002); and Ringed Plovers (a loss of 64 pairs since 1998). All of these are included within the species protection population evaluation obtained through the EMS.

Synopsis of Environmental Impact Observations

- 6.88 Overall, the observations noted within most of the Reserves suggest that certain visitor behaviour can be detrimental to the habitats that the Reserves are designed to conserve and protect.
- 6.89 In particular, activities such as dogs being let off leads and low flying paragliders are believed to have a significant effect on the quality of the nesting and feeding sites of the important bird species within the AONB. The effects of this is disturbance of nesting sites, dogs attacking younglings, disturbance of feeding, and the potential displacement of the young from their nests. Given that this coastline has protected status through the Reserves, the EMS, Ramsar and SSSI's these impacts are certainly undesirable (and in some instances illegal).
- 6.90 Whilst the population of certain bird species has been observed to have fallen over recent years, and although the impacts of visitor behaviour are suggested to have had a contribution to this, no study has been completed whereby the actual effect of these impacts has been attributed a weight of significance (i.e. dogs off leads has contributed to XX% loss in the bird population, etc).
- 6.91 As mentioned, the behaviour observation currently undertaken within parts of the AONB is one of the prescribed methods for analysing visitor pressures on environmental habitats. It provides some very useful information in that it describes the types of visitor behaviour, and the pressures that this causes to certain environments or species.
- 6.92 However, Scott Wilson note that the observations stop short of detailing the severity of the impact in terms of changing the behaviour of the wildlife population. We recognise that this is difficult to achieve with any degree of accuracy, as there may be other mitigating factors that change behaviour patterns. However, if possible we feel that it would be useful to try and determine the extent to which a visitor activity influences the behaviour of different species by simply adding an additional 'effect' measure. This should be used to specify whether the impact has a:

- Low level of consequence - with species returning immediately after the offending activity has passed;
- Medium level of consequence - whereby species return eventually but sometime after the offending activity has ceased; or
- High level of consequence - whereby some or all of the affected species are deterred from returning to the site because of the offending activity.

6.93 It may not be possible to record the 'effect' in every eventuality. However, if this can be collected and analysed, it may be possible to associate a specific environmental cost of tourism. This in turn would add weight to the need for visitors to change their behaviours and patterns; and drive home the message that the whole visitor sector needs to adopt more responsible actions. Upon subsequent conversations with the EMS Manager, it is recognised that this depth of understanding is also an ambition for the EMS.

6.94 In addition, we would also recommend that this method of recording adverse visitor behaviour is adopted at all Reserves with the AONB to ensure a degree of consistency with regards to detailing the impacts and effects of the visitor pressure, and how this may be changing over time; and that a method of research sampling is undertaken to give the measure a statistical weighting. Sampling should cover all relevant time and activity periods (low – high use; weekdays and weekend; school holiday and non-school holiday periods).

Soil Degradation

6.95 The main visible evidence of soil degradation comes in the form of footpath erosion.

6.96 On the whole, footpath erosion, whilst a slight concern, does not appear to be the major issue concerning the visitor impact of walking.

6.97 The main evidence of footpath erosion is along with Norfolk Coast Path, with footpath tracks noted along the eastern section of AONB especially.

6.98 In addition, footpath tracks can be observed through the saltmarsh habitats at the Holkham Reserve, and through sand dunes at Holkham, Holme and Winterton. However, in neither instance are they considered to be of a sufficient level to be treated as a significant threat. In relation to the saltmarshes, scientists suggest the tracks are not believed to be adversely affecting the ability of the habitat to function properly. In relation to the sand dunes, the wardens have been informed that low level walking across the dunes can actually help to ensure that the system does not become fixed.

- 6.99 Several wooden walkways have been developed which have helped ease the pressure of trampling on some of the Nature Reserves, including Cley, Holkham, and Titchwell, and along sections of the Norfolk Coast Path.
- 6.100 However, comments from a small proportion of consultees suggest that this in itself can be viewed as a negative impact resulting from tourism. The claim is that this is leading to the 'sub-urbanisation' of the AONB, and that this is actually detracting from the attractiveness of the natural landscape.

Litter

- 6.101 Litter has not been noted quantifiably as a specific problem in our current investigations. However, anecdotally litter has been observed as a problem at certain sites within the AONB.
- 6.102 Overall, littering is considered to be more of an aesthetic concern in that it is an unsightly intrusion that degrades the value of the landscape. Key criticisms of littering are mainly aimed at the lack of amenities provided (i.e. bins) and the lack of collection, rather than any blame being placed on tourists and day visitors themselves.

Localised Impacts on Pollution and Resources

- 6.103 It has not been possible to quantify some of the more generalised occurrences of pollution observed within the AONB (i.e. fuel spillages and noise) beyond the anecdotal evidence provided by land owners, managers, and other consultees.
- 6.104 However, the following exercise aims to demonstrate some of the more global pollution and resource consumption issues created at a local level. Whilst there will always be a certain amount of displacement (i.e. the visitors would use their car anyway, and therefore create CO₂ emissions), the general consensus is that tourism promotes longer journey times, and drives increased resource consumption over and above that normally observed if the visitor remained at home.
- 6.105 Please note that these calculations have been completed to provide a guide to the more complex relationship between tourism, resource consumption, and subsequent local and global consequences. The figures quoted are therefore representative and are not based on an exact science, or scientific model.

Car Fuel Consumption

- 6.106 According to the 1999 Visitor Survey conducted as part of the 'Valuing Norfolk's Coast' study, 91.9% of visitors used car transport to reach their destination within the Norfolk Coast AONB. This suggests a high level of car usage both to and from the Norfolk Coast, and car movement around the Norfolk Coast.

- 6.107 Whilst car pollution has not been noted by the consultees as a significant impact as far as the AONB is concerned, as previously mentioned, the continuing growth in greenhouse gas emissions is a growing issue with regards to travel.
- 6.108 To provide a guide to the contribution travel to the Norfolk Coast AONB makes to this overall problem of greenhouse gases, it is possible to approximate the level of CO₂ emissions generated by tourism-related car volume.
- 6.109 For the purpose of this exercise, we have assumed that:
- a staying visitor will travel an average of 500 miles in total during their trip, including travel to and from the destination, and between sites within the destination. It is estimated that this creates 0.29 tonnes in CO₂ emissions (source: climatecare.co.uk);
 - a day visitor will travel an average of 60 miles during their journey to and from the Norfolk Coast AONB. It is estimated that this creates 0.02 tonnes in CO₂ emissions (source: climatecare.co.uk).
- 6.110 By applying these figures to the estimated number of staying (844,000) and day visitors (1.95 million), it is possible to estimate that 78,000 tonnes of CO₂ emissions are created by visitors to the Norfolk Coast AONB. Allowing for a displacement of 80% amongst day visitors, this would still create 65,000 tonnes of additional CO₂ per year that is attributable to tourism-related trips to the AONB.
- 6.111 In order to graphically represent the consequences of this, popular theorists on this subject suggest that it generally takes one tree to absorb one ton of carbon. Therefore, this level of emissions would require the planting of 65,000 trees to act as a suitable 'sink' to counteract the additional level of CO₂ created by tourists and day visitors (after displacement).
- 6.112 Whilst we accept that this analysis is open to scrutiny, it has been completed to present the scale of the problem and highlight why the tourism sector and businesses involved in tourism are becoming increasingly held to account in relation to greenhouse gas emissions; and moreover why there are increasing calls for these businesses to become involved in the solutions for reversing these impacts.

Resource Consumption

- 6.113 Our investigations have not revealed a specific study that highlights the consumption levels of visitors in terms of resources, despite the fact that there is a general acceptance that this is one of the consequences of the tourism industry.
- 6.114 As stated in section 5, tourists effectively act as temporary residents during their stay when viewing local resource supply and demand. Therefore, their propensity for energy consumption and waste

generation needs to be assessed both in terms of the additional pressure on resources they create, and the potential for creating conflict with local residents.

6.115 To act as a guide, it is estimated that:

- the average person produces 500 kg of waste per year (Recyclezone.org.uk);
- the average household consumes 4290 kWh of electricity, 14,528 kWh of gas and 0.33 tonnes of oil/solid fuel per year (DETR, 1999). Based on an average number of people per household (2.36), this is equivalent to 1817 KWh of electricity, 6155 KWh of gas, and 0.14 tonnes of oil/solid fuel consumed per person; and
- the average water consumption per person is 150-litres per day (Water Works UK), which is equivalent to 54,750 litres consumed per annum .

6.116 Scott Wilson has applied our understanding of the tourism sector within the AONB to exemplify the level to which visitor activity contributes to the overall impact on resource consumption and waste generation. This has been completed by calculating the overall consumption of local residents per day, and then translating this to the number of visitor hours/days spent within the AONB. From this, it can be roughly estimated that tourism activity contributes, over and above the local population, to:

- The production of an additional 4 million kg's of waste;
- The consumption of an additional 14.5 million KWh of electricity;
- The consumption of an additional 49 million KWh of gas;
- The consumption of 1,100 tonnes of solid fuel (for household consumption); and
- The use of an additional 439 million litres of water.

6.117 Overall, this is equivalent to a further 20% of consumption of resources over and above average residential use. Or in other words, it is the equivalent of increasing the population of the AONB by a fifth on a permanent basis across the whole of the year. To place this within context of the seasonality of tourism, around one-fifth of this consumption will be experienced within the month of August alone; and half of consumption will be between July and September which is equivalent to the population more than doubling from its norm over each of these months.

6.118 Please note that these figures are fairly subjective and do not take into account any consumptions of scale (i.e. one individual staying in a hotel eating restaurant food would not necessarily have the same impact as one person staying in a self-catering unit who prepares their own food). Also, this figure

does not take into consideration any level of displacement of consumption, i.e. the level to which visitors would have used the same resources at home.

6.119 Nevertheless, the figure helps to demonstrate the level to which visitors utilise resources over and above that of local residents, and again acts to highlight the scale of the issue. In particular, it highlights the additional pressure that certain infrastructural resources (water, electricity, gas) will come under, and how refuse collection is likely to be at a premium during peak tourism periods.

Observations of Traffic Volume

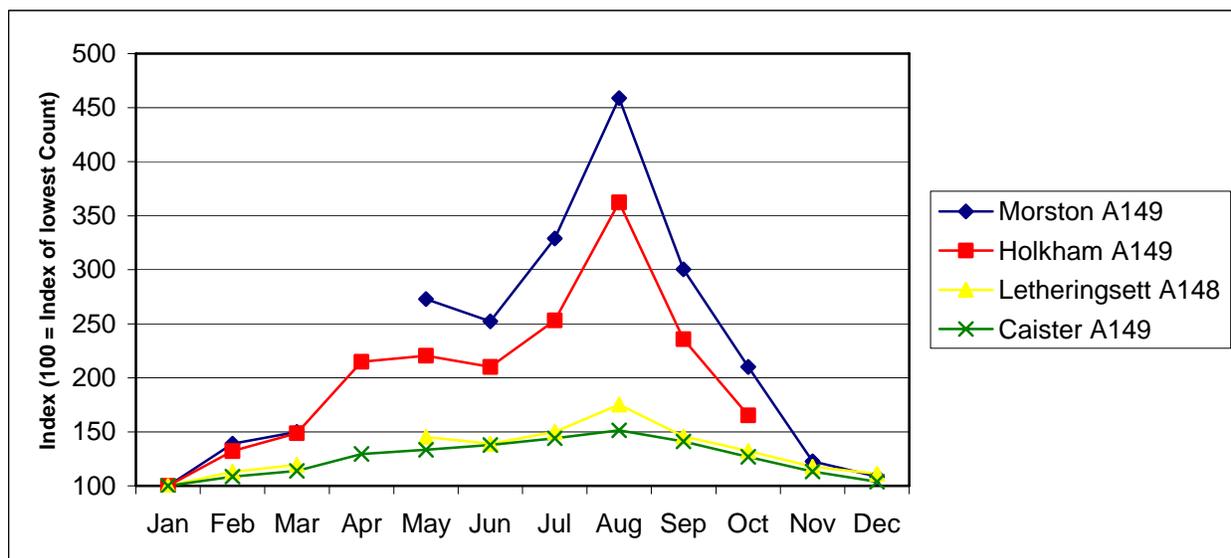
6.120 To try to exemplify the traffic congestion issues, and in response to the inference that the A149 has yet to reach its threshold mentioned under the 'Norfolk Coast Transport Strategy' section, Scott Wilson requested more up-to-date information on the traffic flows along key provincial roads within the Norfolk Coast AONB.

6.121 Chart C5.1 highlights the traffic flows on the key roads both to and within the AONB area throughout 2003. The sample points are taken from:

- the A149 – recordings have been taken at two points, one at Morston close to Blakeney, and the other at Holkham in the west, and Caister near Great Yarmouth in the East; and
- the A148, with the sample point being at Letheringsett just to the west of Holt.

6.122 The graph tracks the changes, on a month-by-month basis, of the average volume of traffic movements per day. In this instance, the readings for January have been given the index of 100 to act as the marker for recording changes.

Chart C5.1 – AONB Traffic Volume 2003 – A149 & A148



Source: Norfolk County Council

- 6.123 As the graph denotes, all of the sample points experienced a substantial increase in traffic volume during the summer months of July, August and September in 2003. However, the change compared to the base is considerably higher for the A149 around Morston (4.5 times the base volume in August) and Holkham (3.5 times the base volume in August). In particular, it should be noted that the traffic along the A149 (Morston & Holkham) rises from about 420 movements per day in either direction in January, to about 2,000 movements in either direction in August.
- 6.124 The importance of this finding is that it reinforces why traffic congestion is perceived to be a problem; and why people counter the implication that the volume of congestion along the A149 is not a “real” issue.
- 6.125 Residents will probably identify with a ‘normal’ amount of traffic. It is likely that this arbitrary ‘norm’ value is formed in the months outside of the main tourism season (i.e. October-March) because they view this time as resident only traffic. Whilst in real terms the increased volume caused by visitors may be below the capacity threshold of the road itself, it is easy to understand the reason why a rise of 450% in traffic, at least anecdotally, can be a fundamental cause of residential animosity towards visitors.
- 6.126 In addition, the road narrows (Cley and Stiffkey) at points along the A149 whereby it is difficult for standard volumes of traffic to pass without problems; and on-road car parking has been noted which exacerbates certain problems.
- 6.127 The result is a situation whereby both residents and visitors suggest that traffic is a considerable problem. For visitors traffic has been noted to be a source of dissatisfaction; for residents, it can be a constant source of frustration that can effect their welfare, and the desirability of the area as a place to live.

Car Parking

- 6.128 Evidence suggests that there is a strong relationship between tourism traffic and the availability of car parking spaces within key sites, but as the County Council research suggests there can be inconsistency in the levels achieved between different sites even at peak tourism times.
- 6.129 Anecdotally, both residents and visitors have mentioned car parks as being inaccessible at key times. However, at present we have not been able to access research to confirm this. For visitors, not being able to find a car parking space can be an irritant; for residents, it can result in a major source of frustration and can actually drive perceptions of there being ‘too much traffic’.

- 6.130 Nevertheless, for some of the main Nature Reserves within the AONB, restricting (or not increasing) car parking spaces can be a useful management tool to curb visitation at sensitive sites, as long as unofficial parking is suitably marshalled. This is the case with RSPB's site at Titchwell where the restrictive car parking spaces means that capacity is never exceeded on a daily basis; likewise Holme feels that its visitor related problems would be much less if car-parking were restricted to the spaces it provides alone.
- 6.131 In this respect, the Partnership has already highlighted where it feels car parks are of sufficient supply, or indeed could be reduced, within its Visitor Management Strategy to assist with individual site management.
- 6.132 Highlighting problems of car parking to visitors at the same time as promoting alternative routes and means of transport, can also be a useful means of promoting the use of walking, cycling, public transport. To be successful, however, the routes need to be clearly identified and be incorporated as part of the 'experience' – i.e. part of a sustainable itineraries strategy that identifies routes to sensitive sites without the need of cars, or whereby cars can be parked in more suitable/robust locations. In the case of public transport, services need to be of sufficient frequency, and be keenly priced for individuals, couples and family groups to make it a viable alternative to the car.

Signposting

- 6.133 Signposting can be another cause for conflict in relation to supporting visitors. In areas of high landscape value, there is a concern that the over-proliferation of signage can lead to the degradation of the overall aesthetic quality of the environment. This was highlighted in the Transport Community Conference by the representative of the Campaign for the Protection of Rural England (CPRE).
- 6.134 However, visitors, generally, by definition, do not know the area and how best to travel between one location and the next. Therefore, they rely on signage to help direct their movement between the places they wish to visit. The ease with which this can take place can be a source of satisfaction (or dissatisfaction) from the experiences of the visitor.
- 6.135 In addition, Brown and White tourism signage can help attract visitors to more remote attractions, and areas of interest, and can be an important source of impulse visiting for rural attractions that would otherwise be off the radar of most people.

Other Traffic Related Observations

- 6.136 In terms of the other observations concerning traffic (speeding, accidents), it is difficult to apportion an appropriate degree of weight to tourism behind any noticeable levels of occurrences.
- 6.137 In relation to speeding, an assumption could be made that the increased traffic on the roads during the peak tourism season could actually prevent occurrences due to the volume of traffic. Whilst we have

been unable to obtain any information to substantiate or refute this claim, speeding was not mentioned as a specific problem in relation to visitors through the consultation and workshop process.

- 6.138 Likewise, we have been unable to identify any correlation between tourism traffic and road accidents, despite anecdotal claims that tourism traffic can lead to accidents through a combination of visitors not knowing the roads, and residents taking unnecessary risks in order to avoid/by-pass tourist traffic.

Community Issues

Local Amenities

- 6.139 A common perception of the benefits of tourism is that it helps to support local amenities such as public transport, local shops, Public Houses, and Post Offices for example.
- 6.140 In this respect, there are conflicting views between Norfolk Coast tourism businesses and some elements of the community as to the weight that should be placed on tourism in this regard.
- 6.141 Proponents of tourism within the AONB suggest that without tourism spend, the level of services available to the local community would be much less than currently available. In particular, reference is drawn to the fact that tourism spend (directly and indirectly) supports jobs, which supports other local businesses, and therefore further employment opportunities (and so on and so forth). This in turn means the survival of other services, including public transport, health and education provision.
- 6.142 Conversely, those with less supporting views of tourism suggest that the spend has not helped stop the closure of services and amenities, and that in fact through their belief that tourism promotes second home purchasing (see below), it does more to exacerbate rather than alleviate the problem. Moreover, they suggest that without the problems that tourism creates, there would be more funding available to support these services.
- 6.143 Furthermore, it is claimed that the services and amenities that have remained have an increased focus towards the visitor market at the expense of local provision. This is particularly in relation to shop items which in the case of some comments have seen corner shops stop selling every-day goods and replace them with more unusual and out of the ordinary products aimed directly at the tourist trade. In addition, some consultees assert that some businesses artificially inflate prices during the peak tourism season, to a level that is beyond the means of many local residents. This latter point is difficult to quantify, as owners will generally point to extra overheads and the need to employ extra staff as part of the rationale behind this rise.

Visitor Nuisance Threshold

- 6.144 The level of 'nuisance' impacts and effects of visitors on the wider community has been the most difficult element to quantify.

6.145 There is a degree of anecdotal evidence which suggests that some of the nuisance problems highlighted are a concern for communities (littering, noise from late night parties, disturbance from nuisance behaviour such as peering over walls and through windows). As a result, some comments suggest that local residents deliberately coincide their holidays to be taken during the peak season for tourism in the Norfolk Coast.

6.146 However, herein lies another issue for some community members in that the tourism season is lengthening, and therefore there is little respite from the impacts of visitors.

The Sub-urbanisation of the AONB

6.147 From the perspective of some community consultees, tourism development of the Norfolk Coast AONB is leading to 'sub-urbanising' the AONB.

6.148 Specific mention was highlighted with regards to:

- the development of boardwalks and hides on Nature Reserves;
- the construction of car parks and visitor centres, which detract from the visual aesthetics of the landscape; and
- directional and information signage, and street furniture.

Second Home Ownership

6.149 Second home ownership has been consistently mentioned as a key issue for the Norfolk Coast AONB during the consultation process for this study.

6.150 As discussed in section 5, there is a commonly held view that there is a definite relationship between tourism and second home ownership.

6.151 This view is reinforced by the fact that there are an estimated:

- 2,581 privately owned static units within the AONB alone (this excludes the static units within the resorts of Cromer, Sheringham, Mundesley and Hunstanton for example);
- 2,280 houses/flats that are registered as 'with no residents: second residence'; and
- 693 self-catering units.

6.152 Static units are designed with the explicit purpose of being sold, and are therefore generally excluded from the perceptions of most people with regards to second home ownership. However, the visual

nature of 'holiday parks' has been noted as a detrimental environmental impact of tourism on the natural landscape, especially by visitors who use other forms of accommodation.

- 6.153 Overall though, the main focus of opinion is with regards to houses or flats purchased as second homes or holiday lets.
- 6.154 Local community representatives highlight the fact that second home ownership is being driven by tourism, and that this is having serious consequences. The main complaints are focused on the fact that:
- second home purchasing is removing housing stock from the market, which is not being replaced by the building of new stock;
 - the limited stock means that house prices are at a level which local people cannot afford; and
 - that second home owners contribute little to the local economy, because, be it owners or holiday-makers, they bring their food and other shopping with them.
- 6.155 Standing in opposition to this, other observations suggest that without ownership of second homes, many properties would stand empty. Furthermore, additional spend is being brought into the economy because of this ownership, particularly through holiday lets but also through the fact that these properties are being used, maintained and improved by their owners.

Analysing the Impacts of Second Home Owners

- 6.156 There is no doubting the fact that second home ownership is considered a fundamental issue within the Norfolk Coast AONB. Additionally, local community perceptions have been noted to draw a very clear link between second home ownership and tourism.
- 6.157 Whilst we do not wish to sidestep this issue, it has become increasingly obvious that second home ownership is too complex to be investigated in sufficient detail within the scope of this study.
- 6.158 There are a number of gaps in information provision which need to be analysed in greater detail, including the motivations, behaviours, usage, impacts and effects of second home ownership. Analysis is also required which defines the characteristics and behaviours of second homeowners, which should aim to provide a clear distinction between tourist visitors and second homeowners; and also second homeowners and local residents.
- 6.159 However, what is fundamental from a tourism perspective is that the local settlements of the AONB do not become 'ghost' towns and villages. The potential for this was highlighted by several community representatives during the consultation process; and also amongst some of the tourists during the visitor focus groups. Some visitors drew reference to the fact that a welcoming and vibrant community

is a key asset of the Norfolk Coast, especially in comparison with other similar destinations they have visited. They too blamed second home ownership, with an overriding opinion that they would not like to see this happen within the Norfolk Coast.

Overview of the Volume and Value for Total Study Area - 2003

6.160 The following section details the main volume and value characteristics of visitors to the Norfolk Coast AONB. A study looking at this aspect of visitors has not been completed for this area as a whole. Rather, there is more generalised visitor volume and value data relating to the three districts as produced in the Tourism Economic Impact Assessments produced by the EETB in 2003; and the RSPB study mentioned in earlier in this section (Previous Studies), although this only relates to sections of the AONB.

6.161 Scott Wilson has used this information, combined with its unique understanding of the nature of the tourism product and plant within the AONB, to attribute a realistic value of tourism visits to the Norfolk Coast AONB. For the purpose of this element of the study, we define tourism visits to be:

- **All Overnight Visits**
- **Tourism Day Visits** only.

Base Information

6.162 The calculations are based on our interpretation of the tourism sector within the Norfolk Coast AONB.

6.163 In order to obtain a figure that is appropriate for the Norfolk Coast AONB, we have utilised information from a variety of sources. The main elements include:

- **Accommodation stock** - Information regarding accommodation stock levels of the Norfolk Coast AONB is based on the investigations of Scott Wilson. Accommodation occupancy has been obtained through the EETB.
- **Value Characteristics** - The characteristics and level of spend of different overnight tourism markets (domestic, overseas, VFR) has been obtained using the economic impact assessments for King's Lynn & West Norfolk, North Norfolk, and Great Yarmouth as produced by the EETB in 2003. It should be noted that the EETB use the Cambridge Economic Impact Model to derive the volume and value figures.
- **Static Caravan & Second Home Ownership** - Information identifying the characteristics of static caravan owners has been obtained through a study into this market within Wales. In the absence of empirical evidence, the assumptions for second home owners are based on our interpretation of the characteristics of this market.
- **Day Visitors** – Scott Wilson has conducted further research into the day visitor market to estimate an appropriate level of tourism day visitors to the Norfolk Coast AONB utilising the 2003 GB Leisure Day Visitor Survey.

- **Multiplier & Employment Outputs** – Scott Wilson has transposed the multiplier and employment outputs as defined by the EETB for each of the districts as detailed in their economic impact assessments.

Economic Analysis Limitations

- 6.164 The following volume and value figures should be treated with caution.
- 6.165 The EETB states that there are certain inherent limitations within the Cambridge Model, as there are with all economic impact assessment models. This is caused by changes in data collection which the models rely upon; the accuracy of the data that is placed within the model; and changes to sample populations for example. The results of any economic impact assessment, therefore, should only ever be treated as indicative of the scale and importance of visitor activity in the local area and as a snapshot in time.
- 6.166 This caution needs to be recognised throughout the following analysis. Whilst we have endeavoured to provide an accurate reflection of the volume and value, for the same reasons outlined above, there may still be certain inaccuracies for which we have been unable to make sufficient allowances. Therefore, we would request that this information is treated as indicative only. In addition, our process should not be considered a true economic impact assessment, as we have not used a specific assessment model such as Cambridge or STEAM. Rather, we have transposed the information obtained onto previous workings provided by the EETB who utilise the Cambridge Model.

Overnight Visits

- 6.167 For the purpose of this study, we have grouped overnight visitors by accommodation type to allow for a more accurate reflection of their volume and spend characteristics. These types are defined as follows:
- visitors using commercial accommodation;
 - visitors visiting friends and relatives; and
 - visitors using owned accommodation (static caravans and holiday homes).
- 6.168 The rationale for this is to allow for a more appropriate apportionment of volume and value to each visitor using these accommodation types, which are ultimately very different. For instance, the VFR market are unlikely to spend money on accommodation; whilst those staying in owned accommodation will have less propensity to eat and drink out. Our assumptions for users of each accommodation type are examined further within the relevant section.

Overnight Tourists Using Commercial Accommodation

6.169 Commercial accommodation is generally defined as accommodation whereby a financial transaction takes place from the visitor to the accommodation establishment for its use. This includes (see Audit section):

- all serviced accommodation (B&Bs, Inns, Guest Houses, Hotels) – total of 2,828 bedspaces within the Norfolk Coast AONB;
- all self-catering units – a total of 693 units within the Norfolk Coast AONB;
- all touring pitches – a total of 2,824 pitches available on touring only sites and Holiday Parks;
- a small proportion (20%) of static caravan units which are available as commercial lettings – 645 units within the Norfolk Coast AONB; and
- other bedspaces – an estimated 562 bedspaces provided by group/education/research accommodation.

Total Volume of Visitors using Commercial Accommodation

6.170 By transposing average occupancy rates as collated by the EETB onto the above accommodation stock levels, it is possible to estimate the volume of visitors per commercial accommodation type. This is based on the overall number of nights and average duration of stay. The premise of these calculations are provided in Table 6.2.

Volume of Overnight Visitors by Accommodation Type						
	Serviced	Self-catering Units*	Touring Pitches*	Static Units*	Other	Total
Accommodation Space/Units	2829	693	2824	645	522	
Average Occupancy [†]	41.0%	51.8%	40.5%	55.3%	41.0%	
Number of Nights	455,389	403,354	606,405	309,722	86,124	1,860,994
Average Duration of Trip [†]	4.2	4.2	4.2	4.2	4.2	
Number of Visits	115,640	102,455	154,149	78,058	21,737	472,039
* Based on an average party sized of 2.88 per Unit/Pitch						
† Please note that SW calculations are based on occupancy per month and average duration per trip and by domestic and overseas visitors by district rather than these generic averages. The overall calculations can be found in Appendix A5, table 5.2.						
Source: EETB/Scott Wilson						

6.171 Overall, the volume of overnight visits using commercial accommodation is estimated to amount to **472,039 trips**, staying a cumulative 1.86 million nights within the area.

- 6.172 For self-catering units, static units, and touring pitches, the volume is based on an average party composition of 2.88 people. This figure is taken from the RSPB study.
- 6.173 The average trip duration for the three districts combined is 4.2 nights. The RSPB study suggests that the average duration could be higher, with an average of 6.2 nights in peak season (August) and 5.5 nights in the shoulder season. However, on the basis that there were only two sample periods for the study, combined with our knowledge of overall changes in tourism market characteristics, we feel that it is more prudent that to retain the district averages in the absence of a more up-to-date visitor survey.

Total Value of Visitors using Commercial Accommodation

- 6.174 The value of trips is simply calculated by multiplying the volume of visitors by the average spend per night stayed within the destination. This spend includes all expenditure which results from the trip and that is spent within the destination itself, with categories including accommodation, catering, retail, entertainment, and petrol/transport costs.
- 6.175 The EETB estimate that the average spend for overnight tourists to each of the districts is as follows:
- £32.89 per night for domestic visitors, and £44.66 per night for overseas visitors
 - £37.74 per night for domestic visitors, and £46.19 per night for overseas visitors
 - £43.25 per night for domestic visitors, and £50.64 per night for overseas visitors
- 6.176 As a result, the estimated value of overnight visitors using commercial accommodation within the Norfolk Coast AONB is **£63.3 million**.

Overseas Visitors

- 6.177 According to the EETB data, overseas visitors account for between 4% (Great Yarmouth) and 7% (North Norfolk) of visits to the districts. The benefits of overseas visitors is that they tend to stay longer (average of 6.9 nights), and thus spend more per trip (average of £324.50) than their domestic counterparts (3.8 nights duration; £145.02 spend per trip).
- 6.178 We have allowed for this within our calculations, with overseas visits within the AONB accounting for an estimated:
- 17,300 trips;
 - 121,000 nights; and
 - £5.5 million in spend.

Visiting Friends and Relatives

- 6.179 The visiting friends and relatives (VFR) market is largely dependent upon the population of the destination.
- 6.180 It is a generally held view that every head of population generates at least one VFR visit per annum.
- 6.181 Overall, the population of the Norfolk Coast AONB is 40,302 (based on 2001 census). Therefore, it is approximated that roughly 40,300 VFR will be generated within the Norfolk Coast AONB.
- 6.182 On the basis that VFR visits tend not to involve a stay in commercial accommodation, this spend category has been omitted from the value calculations. In addition, it is likely that their propensity to visit attractions, go out for meals, and for purchasing gifts will be less than staying visitors within commercial accommodation. As such, we would suggest that their expenditure value per head will be much lower.
- 6.183 For the purpose of generating a value figure for the VFR market of the Norfolk Coast, and in the absence of an empirical value figure generated from a visitor survey, we have assumed that the VFR visitors spend the equivalent of c.£26 per night (this is consistent with economic impact studies completed on other AONBs within the UK), with the average duration being 2.1 nights (average for England) per trip.
- 6.184 Altogether, the VFR market equates to some **£2.2 million** in spend to the local economy.

Owned Accommodation Trips

- 6.185 Our investigation into the composition of the tourism accommodation within the Norfolk Coast AONB suggests that a high volume of visitors that are classified as 'tourists' actually own a property within the Norfolk Coast AONB.
- 6.186 The research conducted on the Wales Caravan market (see Appendix A4) intimates that owners of static caravans and the second homeowner are likely to share certain characteristics. Indeed, one of the key findings of the study is that one of the prime motivations behind purchasing a static property was that it offered a more cost-effective solution to buying a 'second home' than the purchase of a house or flat.
- 6.187 As such, and in the absence of a suitable study which details their characteristics, we have assumed that the spend and behaviour of static owners and holiday owners are relatively similar.
- 6.188 Altogether, the audit of accommodation stock suggests that there are:
- an estimated 2,580 static caravan units that are in private ownership within the Norfolk Coast AONB, virtually all of which are housed in 'holiday parks'; and

- an estimated 2,088 second homes defined as not being occupied by the owner on a permanent basis.

6.189 In order to generate volume and value figures, we have made the following assumptions:

- owners and their friends and families will visit their property (static/house/flat) approximately 25 times per year (taken from the Wales Static Caravan Survey);
- they will stay at the property for the same average duration per trip as commercial accommodation users (c.3.8-3.9 nights);
- each trip will have a party composition of 2.88 people per visit;
- spend per person per night will be equivalent to £7.50 for static unit owners (equivalent to the Wales Study) and £10 for houses/flat owners;
- Static owners will incur rental and service charges of £1,400 per annum (taken from the Wales study); and
- Second homeowners are required to pay an average £900 in council tax contributions per annum.

6.190 Overall, this gives volume and value figures of:

- **332,000 visits** made to the Norfolk Coast AONB by people who static units or second;
- this equates to roughly **1.27 million nights** spent in owned accommodation; and
- in turn this generates a total of **£10.9 million of discretionary spend** (i.e. spend related to the trip to the area), and a further **£5.4 million in relation to charges and tax**. Therefore, the overall average spend contributions of property owners is **£16.4 million** (allowing for rounding).

Overall Spend Generated by Overnight Visits

6.191 Table 6.3 provides a breakdown of the total volume and value of overnight visitors to the Norfolk Coast. **Overall, 844,000 visits generate a total of £81.9 million in spend.**

Table 6.3

Total Spend of Overnight Visitors within the AONB					
	Commercial Accommodation	VFR	Static Property Owners	Second Home Owners	Overall Total
Total Overnight Visitors	472,039	40,393	185,818	146,052	844,302
Total Nights	1,860,994	84,825	714,068	559,326	3,219,213
Total Overnight Value	£63,295,292	£2,223,799	£5,355,511	£5,593,257	76,467,859
Land Rental/Service Charge/Council Tax			£3,613,120	£1,825,648	£5,438,768
Total Value by Sector	£63,295,292	£2,223,799	£8,968,631	£7,418,906	£81,906,628

Source: Scott Wilson

Tourism Day Visits

- 6.192 Tourism day visits represent a key source of economic revenue for many destinations in the UK, and are defined as trips taken away from the place of residence that are 3-hours or more in duration, but where the return journey is taken on the same day.
- 6.193 The advantages of this predominantly local market in terms of tourism are the relatively low costs involved in marketing and targeting this sector, and the potential for out-of-season visitation and for special events. This market is particularly important to the success of attractions. This catchment of the Norfolk Coast has been calculated at (see Appendix A4):
- 176,000 people within a 30-minute drivetime;
 - 800,000 people within a 60-minute drivetime; and
 - just over 2.7million people within a two-hour drivetime.
- 6.194 The reason for utilising tourism day visits rather than leisure day visits is that we feel that it is more likely to represent new discretionary spend (i.e. from visitors who live outside of the AONB) rather than displaced spend (from people who live within the AONB).

Volume & Value of Tourism Day Visitors

- 6.195 In order to ensure that the data within this economic impact assessment is reflective of additional spend only, Scott Wilson has refined the day trip definition to include tourism day trips only (i.e. trips of a duration of 3 hours or more).
- 6.196 Analysis of the Great Britain Leisure Day Survey 2003 suggests that, on average, a person in the UK makes 88 day trips out from home (no time limit), of which 19 million (22%) are classified as tourism

leisure day trips (duration of 3 hours or more). The study denotes that 499 million day trips are taken within the East of England, of which 117million (23%) are classified as tourism day trips.

- 6.197 We believe that a realistic proportion of all day trips that will take place within the three districts of North Norfolk, King's Lynn and West Norfolk, and Great Yarmouth equates to 4.5% of the total for the region (or 22.7 million trips). This is equivalent to EETB's estimations for the three districts. However, the EETB has used this leisure day figure to calculate its day visitor spend figure for the districts. We prefer to use tourism day visits.
- 6.198 To identify the proportion of tourism day trips, this figure is multiplied by a factor of 0.23 (i.e. 23%, reflecting the proportion of tourism day visits calculated for the region). Thus, the level of tourism day trips within three districts is the equivalent of 5.2 million.
- 6.199 To provide a sufficient weight of tourism day trips taken within the AONB, we have taken account of the attractive character of the landscape; opportunities for countryside and coastal activities; the level and nature of key attractions; the juxtaposition of the AONB in relation to the coastal resorts of Cromer, Sheringham, Mundesley, Hunstanton; and the potential competition for day visits from Great Yarmouth and King's Lynn. On the basis of our understanding of these markets, we feel that between 25% and 30% of the tourism day trips will take place within the Norfolk Coast AONB.
- 6.200 This is equivalent to **1.8 and 2.1 million tourism day trips per annum**.

The Value of Tourism Day Trips

- 6.201 For ease of calculating a value, we have taken the mid point of 1.95 million tourism trips in terms of volume.
- 6.202 By multiplying this by the average tourism day trip spend figures (c.£26 per trip), it is possible to calculate that the value of tourism day trips is **£51 million**.

The Economic Impact of Tourism within the Norfolk Coast AONB

- 6.203 The following Tables (6.4, 6.5 and 6.6) summarise the key economic contribution of the main 'visitor' markets to the AONB.

Table 6.4				
The Economic Benefit of Overnight Tourism				
	Volume	Nights	Spend Value	Other Expenditure
Commercial Accommodation	472,039	1,860,994	£63,295,292	-
VFR	40,393	84,825	£2,223,799	-
Owner Accommodation	331,869	1,273,394	£10,948,769	£5,438,768
Total	844,301	3,219,214	£76,467,860	£5,438,768
Total Spend			£81,651,485	
Source: Scott Wilson				

Table 6.5			
The Economic Benefit of Tourism Day Visits			
	Volume	Nights	Spend Value
Day Visitors	1,956,418	-	£51,009,505
Source: Scott Wilson			

Table 6.6			
The Economic Benefit of All Tourism			
			Spend Value
Total Value			£132,916,132
Source: Scott Wilson			

6.204 Overall, the tables denote that tourism is directly worth a cumulative total of **£132.9 million** per year to the local economy (i.e. all the transactions made by tourists directly on goods and services within the AONB).

6.205 In order to achieve a full assessment of the economic impact and effects of this spend, this data is inserted into an input-output economic model. These models take into account:

- Indirect effect, which represents the purchases of local goods, services and capital, and the flow of expenditure that arises from within the local economy, i.e. all the purchases of goods, services and capital further down the supply chain.
- Leakage and displacement, which is the amount of spend which will be lost from the local economy within the subsequent rounds of spend; an

- Induced effect, which represents the process through which the initial expenditure of staff, visitors and the resort generate subsequent rounds of expenditure in the local economy. This is also referred to as the multiplier effect.

6.206 The East of England Tourist Board, through the use of the Cambridge Economic Impact (Input-Output) Model, estimates that through indirect and induced spend, and after leakage, every pound spent within the three districts is equivalent to between £1.19 and £1.35 in terms of its value to the wider community (or every pound spent creates an additional £0.19p to £0.35p in the subsequent spend rounds).

6.207 Taking this into account (and after some initial adjustment to allow for displacement), this means that the initial tourism spend generates a further **£33.4 million** within the AONB economy. To place this as a total contribution, **the overall worth of tourism spend generated within the Norfolk Coast AONB is £163.2 million.**

Tourism Employment

6.208 To allow for a greater understanding of the overall worth of tourism, this economic value is usually translated into full time equivalent (FTE) and actual jobs created or supported by tourism activity. In relation to the three districts, it is believed that it takes between £70,000 and £73,000 to support 1 FTE through direct spend; and between £28,000 (North Norfolk) and £60,000 (Great Yarmouth) to support 1 FTE through indirect/induced spend (derived from the EETB economic impact assessments).

6.209 The process for these calculations is outlined in table 6.7.

Table 6.7	
Economic Value of Tourism Spend & Jobs Supported/Created	
Total Spend	£132,916,132
Total Spend after Displacement	£129,735,770
Average Multiplier*	1.3
Induced/Indirect Spend	£33,479,760
Total Value of Tourism Spend	£163,215,530
Direct FTE's	1,795
Indirect/Induced FTE's	844
Total FTE's	2,639
Direct Actual Jobs	2,756
Indirect/Induced Actual Jobs	907
Total Actual Jobs	3,664
* Aggregate of Multipliers used for each district. Please note, the actual Multiplier was used for calculation purposes.	
Source: Scott Wilson	

6.210 By transposing this assumption on the total value figure for the Norfolk Coast AONB, it is possible to estimate that tourism spend supports:

- 1,795 FTE's (2,756 actual jobs) supported by direct tourism spend;
- 844 FTE's (907 actual jobs) supported by indirect/induced tourism spend;
- a combined total of **2,639 FTE's (3,664 actual jobs)** supported by all tourism spend.

Tourism Employment Assessment

6.211 In 2004, the Learning & Skills Council provided a detailed review of the key employment sectors within Norfolk. Included within the report is a review of the tourism sector workforce and skills base. Whilst this does not specifically relate to the AONB area itself, it does provide some useful information on the nature and characteristics of tourism employment which is certainly of relevance to the AONB.

6.212 The following provides a summary of the key findings of this report.

Tourism Industry Definition

6.213 The report recognises the complexity of the sector in that tourism does not represent one industry, but rather it involves many different industrial sectors each of which have different skills requirements.

6.214 Broadly speaking, the front-facing industries (i.e. those industries which have direct contact with visitors) are defined as Hospitality and Leisure businesses. Some of these businesses may have a heavy dependency on visitors, such as hotels and attractions. For others, visitors spend and activity may assist in the economic viability and profitability of the business, although the prime focus may be on the local market such as leisure centres and other sports facilities.

Business Make-up

6.215 Tourism businesses are often small scale in size and employ few workers. Norfolk is no exception, with over a third (34%) of tourism businesses having 10 employees or less. This compares to a fifth (21%) of all businesses within the county. Only 15% of tourism businesses employ over 100 people. This compares to 38% of all businesses in Norfolk.

6.216 These figures reflect the nature of accommodation enterprises in particular. B&Bs and self-catering establishments are often single person enterprises. In this respect, it should be recognised that accommodation enterprises, and also small-scale attractions or visitor services (horse and carriage rides, canoe hire, bike hire, etc) present an opportunity for people to become self-employed.

6.217 In other aspects of the sector, there are also opportunities for entrepreneurial initiative. The sector is ever evolving, particularly in terms of activities being offered to visitors, the facilities they require and the services they demand.

Qualifications & Skills

6.218 In terms of qualifications, the report highlights low-levels of education amongst the Tourism sector workforce, with a large proportion (45%) of the workforce having no higher than a level 2 (GCSE's) qualification, and 15% having no educational qualification at all. In addition, the proportion that is educated to degree level, around 10%, may not have specific knowledge of tourism as there is a tendency for companies to take on graduates from a variety of disciplines. This problem could become exacerbated if an observed decline in enrolment levels on specific hospitality courses continues.

6.219 The report suggests that the skills requirements for those involved in tourism are predominantly generic skills, including:

- Willingness to learn;
- Flexibility of working hours and conditions;
- Personal appearance;
- Ability to follow instructions; and
- Ability to team-work.

6.220 However, the report also stated that there were still shortages in these skills amongst a large proportion of the workforce. Communication, though, was the single largest gap in skills reported by businesses. This is a major problem in the hospitality and leisure sectors whose clientele rely on clear information. Good personal presentation, friendly demeanour, and ability to respond effectively to queries, questions and complaints are also critical to demonstrate professionalism within the sector.

6.221 The report recommends that fundamental needs which should be addressed include:

- To develop marketing skills in an increasing competitive industry facing competition in global markets;
- To develop foreign language skills as international tourism grows;
- To improve the 'professionalism' of the industry via higher rates of training and qualification of staff;
- To create a new generation of skilled managers able to take a strategic approach to their businesses; and

- To develop higher standards in the key craft group in the industry – chefs and cooks.

Working Conditions

- 6.222 The lack of representation of qualified employees is often a result of the poor image of working conditions for staff in tourism. Low pay; low progression prospects; unsociable and long hours; and the high levels of seasonal, part-time only opportunities are common complaints amongst the workforce involved in the tourism sector. As a consequence, tourism-related businesses experience high levels of staff turnover, low commitment, poor attitudes and poor communication skills.
- 6.223 Lifestyles and life cycle also play a key role in particular in the employment make-up of the tourism industry. There is a high propensity for the workforce to be female, who may require greater flexibility in their working life to maintain family commitments, and who may want to supplement the household income; empty-nesters utilise rooms within their household to provide a bed & breakfast. Also, retirees sometimes utilise their time in the pursuit of particular hobbies and interests, or skills which can be offered to tourists, such as special interest guided walks, specific courses and crafts (painting/pottery/cookery), or opening up collections to the public.
- 6.224 It has been beyond the scope of this study to examine the actual working conditions of tourism employees. However, a business survey completed as part of North Norfolk Tourism Sector notes that:
- Four in every ten (42%) tourism businesses employ a manager. In the case of hotels, the majority have two or more managers (11 out of 16), with the largest hotel in the survey employing seven managers.
 - Only one in eight (12%) of businesses have supervisor roles, with those that are available predominantly found in the hotels sector (seven of the 16 hotels responding offer a supervisor position).
 - Just over one in every five (21%) tourism businesses have some level of servicing staff, the majority of which are in the hotel/inn/guest house sector; the hotel sector has an average of 17 service employees per establishment, primarily related to bar and restaurants.
 - Cleaning/maintenance is by far the largest employment sector within accommodation establishments, with camping and caravan sites (around 10 per site, though this was only based on 4 sites) having the largest number of staff, followed by hotels at an average of 3.2 staff per establishment.
 - In addition, nearly six in every ten (57%) of self-catering establishments employ cleaning/maintenance staff, with the average number of employees at 1.5 per establishment. This reflects the fact that around half of the operators surveyed have more than one unit to let.

- Overall, the main employers are hotels, which employ an average of 15.5 full-time staff, and 14.6 part-time staff; and camping and caravan sites, with around 12 full time and 12 part time staff [caution, low base of four establishments responded]. In the case of hotels, this roughly equates to one full-time and one part-time staff member per bedroom, or just under one staff member for every bedspace.
 - On the whole, of those who responded to questioning, the majority of businesses currently employ similar proportions as they did five years ago, particularly amongst management and supervisor staff. The only area which has seen a reasonable net gain (i.e. where the proportion of respondents increasing staff numbers is observed to be higher than the proportion decreasing staff numbers) is in cleaning/maintenance staff (16% of business have increased the number of cleaning/maintenance staff compared to 6% who have decreased staff in this field).
- 6.225 Please note the above survey was conducted with reference to tourism accommodation businesses only, and therefore excludes other forms of businesses (catering, leisure, shopping) that also rely on tourism spend.
- 6.226 Overall, the majority of positions within the tourism sector are said to be at the lower end of the pay scale, even in relation to managerial positions.

Regeneration

- 6.227 As mentioned in Section 5, a further economic benefit of tourism is that it is defined as a sector that can assist with regenerating areas of high deprivation.
- 6.228 The northern areas of Norfolk do come under this category, with an area stretching from Hunstanton in the west to Cromer in the east included within the East of England Objective Two European Funding Programme.
- 6.229 New applications for the programme are to cease in the near future, with the final projects to be identified and funds committed by the end of 2006. Altogether, specific tourism-related projects within the area have received just under £1.4 million of combined European funding. This includes:
- The Wells YHA Conversion Project (£107,000);
 - Titchwell RSPB (£65,000);
 - Sheringham Park (£487,000)
 - Wells Harbour Phase I (£133,000); and

- The GEESE Project (£569,000).
- 6.230 With requirements for match finance from a mixture of public and private sourcing, this funding has led to a much greater level. European Funding can finance up to 50% of capital investment, however the realistic proportion is around 30-35%. Therefore, these projects alone equate to between £4-£4.6 million of investment due to tourism.
- 6.231 In addition, tourism projects have also benefited from the Tourism Capital Grants Scheme (funded through the Objective 2 Programme). This scheme is designed to award grants to small-scale capital projects which aim at improving the quality of the tourism product. Within North Norfolk, this scheme was specifically targeted at raising the quality standard amongst tourism accommodation operators, with projects including:
- The reconfiguring of bedrooms to form ensuite provision;
 - Extensions to existing operations to increase stock provision; and
 - The development of an indoor swimming pool.
- 6.232 Altogether, 13 projects have been awarded within the North Norfolk Objective 2 area, with grants amounting to £150,000, with a total investment of £643,000. It is claimed that this has created 21.5 FTE's, and safeguarded 73.5 FTE's.
- 6.233 The Norfolk Coast AONB is also the beneficiary of a £90,000 Sustainable Development Fund. This is to be targeted at small scale projects which aim to:
- Conserve and enhance the natural beauty of the AONB (landscape, geology, wildlife or culture);
 - Meet recreational needs and to promote sustainable forms of social and economic developments.
- 6.234 Projects that the Sustainable Tourism Fund has been awarded to include:
- £2,250 for the Norfolk Historic Buildings Trust to enable school children to visit Waxham Barn;
 - £3,430 to the National Trust's Forest School at Sheringham Park;
 - £3,405 to Norfolk County Council for leaflets and interpretation boards on Paston Way;
 - £1,746 for the Norfolk Wildlife Trust for Family Wildlife Explorer Kits;
 - £1,500 for Norfolk Wildlife Trust for Coastal Connections – a project allowing disadvantaged school children to visit the coast.

6.235 Other funding sources include HLF that, for example, provided match funding for the Wells Harbour project; and helped fund the creation of the Waxham Barn as a centre for conservation skills training which also doubles as a tourist attraction.

7 Adopted Sustainable Tourism Initiatives & Practices

7.1 The management of tourism within protected and sensitive areas is an evolving process. The Visitor Management Plan, devised by the Norfolk Coast Partnership, has great foresight for its time, and many of the principles that guided the strategy still apply today.

7.2 The following section highlights some of the initiatives being introduced to counteract the impacts of tourism both on a global and local scale.

Global Practices

7.3 The two major global issues facing the tourism sector revolve around resource consumption, be it:

- through the consumption of fuel caused by the need to travel to a destination; or
- through the compounded use of resources at a local level.

7.4 Again, it needs to be recognised that the tourism industry is not alone in needing to identify its role in resolving these global problems. In response, there has been an increasing drive to encourage the sector to assist in the wider solutions of reducing resource consumption, or at the very least off-setting some of the more negative consequences.

Carbon Off-Setting

7.5 Carbon off-setting schemes are growing in popularity as greater emphasis is placed on an individual's energy and fuel consumption rates. Through several web-sites, it is now possible to approximate household energy consumption and consumption of fuel during a journey, and discover how this equates to CO₂ and other greenhouse gas emissions.

7.6 Linked to this are several means of off-setting these emissions through specific Carbon Off-setting schemes. These encourage all travellers to compensate for their carbon emissions by volunteering a financial contribution towards schemes that seek to create more carbon absorbing and storing materials (sinks), or where the donation funds energy saving projects.

7.7 Forestry in particular is a key theme of many of the schemes that operate in the UK. Scientific research has generated a simple calculation to demonstrate the amount of trees needed to absorb the greenhouse gas one person produces. For example, one car travelling at average mileage produces enough carbon emissions in one year to require 5 trees to be planted to off-set this impact.

7.8 Examples of schemes to which visitors can currently contribute include:

- The CarbonNeutral Company – contributions can be placed towards either a tree-planting scheme (with the cost of £10 per tree) or through the donation of energy saving light bulbs to a developing community (again at a cost of £10 per bulb);
- co2balance.com – the advantage of this scheme is that it allows the calculation of carbon dioxide from a single journey. Contributions to off-set carbon emissions are through the purchase of a tree (£8 each) within a forestry planting scheme; and
- Climate Care – Climate Care has a slightly different emphasis, with funds raised going towards supporting specific sustainable energy projects around the world such as Rainforest restoration in Uganda; the capturing of methane emissions from UK coal mines; or Energy-saving lighting in South Africa. Both BA and ResponsibleTravel.com support Climate Care's programme of emissions off-setting, with their customers requested to contribute to the programme via a calculated cost based on the emissions they create during their travel.

7.9 Critics of these schemes suggest that they gloss over the real problem of a continued increase in carbon emissions, and do not actually address the need to reduce travel. These views may become even stronger in the case of tree planting schemes, if recent research revealed by the Royal Society of Chemistry suggesting that trees give off higher levels of Methane than originally thought is further substantiated.

7.10 However, proponents state that at the very least it evokes thought amongst travellers to consider their impacts and make a financial contribution to assist with rectifying this situation; and at best may actually change their behaviours in the future by demonstrating the benefits of choosing sustainable transport methods over car travel.

Sustainable Transport

7.11 At a more localised level, the key initiatives being introduced to reduce carbon emissions are through the encouragement and use of more environmentally sustainable forms of transport, especially public transport. Common initiatives include:

- The introduction and/or promotion of public transport links to destinations. A wide variety of leisure packages are currently on offer seeking specifically to encourage low cost public-based travel (super-saver tickets; two-for-the-price of one weekend train fares; money-off attractions coupons coupled with train/bus tickets, etc.).
- The development of public transport at the destinations with a specific focus on meeting the needs of visitors, promoted as part of the 'experience' of an attraction (Hadrian's Wall Bus), or offering a specific service for visitors (destination hopper services; bike carrier facilities).

- The development of stronger opportunities for walking, cycling and where appropriate canoeing/kayaking as forms of discovery as well as healthy/sporting activities. The Broads National Park, for example, has strengthened its position in this regard by introducing an initiative to encourage visitors to The Broads to explore the wider area using these more sustainable forms of transport that also offer a different perspective. Ten specific hire points have been identified and promoted which are run by boatyards, shops and other small businesses.

7.12 The result of these schemes in changing visitor behaviour may ultimately be constrained by the fact that, as a general rule, the preference of the population for car-borne travel is continuing unchecked. The overall advantages of car travel, and the freedom and practicality of movement that it presents to the user is well known. From a visitor perspective, it is also the sense of freedom they have to explore new areas (leave the beaten track), define their own experiences (i.e. their movement is not totally prescribed to them), and that they are not bound by time forced pressures. All of these factors make the use of the car too appealing to compromise for the majority of visitors.

7.13 This is not to say that some schemes have not been successful in changing visitor movement and impact behaviour. Indeed, the appeal of walking and cycling is now a key choice motivator for many destinations, with the benefit of providing a higher sense of exploration and discovery. Nevertheless, most people still have a tendency to drive to the walking or cycle route access points first.

Green Business Initiatives

7.14 As a general rule, recycling and recycling points are becoming more readily available; businesses are able to invest in more sustainable forms of energy production; and new technologies mean that energy consumption can be reduced through simple practices. In theory at least, it should now be much easier than in the past for tourism businesses to adopt more sustainable practices. In this respect, there have been a number of initiatives introduced directed at tourism businesses to encourage the adoption of more sustainable driven practices.

7.15 However, a recent study of tourism enterprises in the Lake District highlighted that many operators are still to adopt all encompassing environmental policies. The study which included a survey of some 400 businesses across a range of disciplines (serviced accommodation, attractions, food producers, and craft makers) highlighted the following key findings:

- There is a low level of awareness of environmental management practices, policies and conservation initiatives amongst enterprises;
- Just under a quarter (24%) of serviced accommodation operators conduct some form of environmental audit;

- The most common measures adopted by business in order to become more environmentally aware include monitoring waste (56% separate waste for recycling) and energy consumption (most establishments are aware of energy efficient fittings, but use was still found to be low);
- Poor levels of information, inadequate facilities and poor access were described as the main barriers to recycling more waste;
- Environmental awareness and best practice is generally not promoted to visitors by businesses, with the main messages concentrating on energy consumption; and
- Only 4% of businesses cited costs as being the main discouraging factor towards becoming a 'greener' business.

7.16 Whilst there is a recognition amongst businesses, therefore, of the need to think more consciously about environment, this has not manifested itself in initiatives being adopted beyond the more straight forward concessions, i.e. waste management through recycling and energy reduction through low watt light bulbs. In the future, this position may change with the more global issues anticipated to move up the political agenda which in turn could place business under stricter controls on resource consumption.

7.17 For the more far-sighted or environmentally conscious operator, there are several initiatives which target tourism businesses in relation to adopting environmental conscious practices. These are reviewed in brief below.

The Green Audit Kit

7.18 The Green Audit Kit has been around since 1996 and is still available today. Originally promoted through the Tourist Boards and subsequently with the assistance of the Countryside Agency, the aim of the Audit Kit is to allow tourism enterprises to identify opportunities within their own business to adopt more environmentally conscious practices. This includes recommendations on:

- Resource efficiency - low energy light bulbs, insulation, thermostat settings, energy use of appliances, and techniques on conserving the use of water;
- Thoughtful purchasing – recycled paper, bio-degradable packaging, the use of environmentally friendly cleaning products, and the use of local suppliers;
- Waste and recycling – denoting which materials that can be recycled, the benefits of composting, and involving customers in recycling;

- Visitor environment – including the aesthetics of the establishments grounds, offering vegetarian food, providing smoke-free zones, and involving guests in assisting with the conservation practices; and
- Transport – promoting walking and cycling and cycle hire, and encouraging use of public transport;

7.19 According to research conducted in 1997, businesses that adopted the advice of the Green Audit Kit saved £1,525 on average (where savings were recorded).

David Bellamy Conservation Awards

7.20 The David Bellamy Conservation Awards is a fairly recent award that is being used to promote the environmental ethos within the business culture of camping and caravan parks.

7.21 The awards are gained by parks that can demonstrate policies and practices designed to care for the environment, wildlife, and park management; and which actively encourage holiday-makers to adopt environmentally friendly practice during their stay. Camping and caravan parks can be awarded a bronze, silver or gold mark, depending on the level of policies adopted and implemented.

7.22 Altogether, there are 600 parks in the UK who have received a Conservation Award, 500 of which have attained the gold mark.

7.23 Parks which have gained the award within the Norfolk Coast AONB include:

- Kelling Heath – Gold
- Pinewoods – Gold
- Forest Park Caravan Park – Gold
- Woodhill Park – Gold
- Sandy Gulls Holiday Park – Silver
- Seacroft Camping Park – Bronze

Green Tourism Business Awards

7.24 The Green Tourism Business Scheme (GTBS) is the most widely used accreditation scheme for tourism businesses that adopt sustainable practices.

- 7.25 Under this scheme, the environmental practices of tourism businesses are assessed once every two years by IEMA registered environmental auditors, who have considerable experience within the tourism sector.
- 7.26 The businesses are graded against 120 measures of best practice, reflecting a balance of environmental, economic and social issues. These cover everything from good management and communication to efficient lighting and heating, as well as elements such as nature conservation, using and promoting local crafts and produce, utilising renewable energy, and gaining the support and involvement of wider community.
- 7.27 Originally pioneered in Scotland in 1998, the scheme has successfully accredited 600 businesses, who are now able to use this accreditation within their literature. The scheme is now considered to have been successfully trailed, and to be launched by both the South East and the South West regions. Other regions are reputedly interested in identifying the benefits of the scheme.

Sustainable Park Designation

EUROPARC Charter

- 7.28 The EUROPARC Federation launched the European Charter For Sustainable Tourism in Protected Areas in 1995. The Charter is a strategic approach to sustainable development of National Parks and specific protected designations throughout Europe.
- 7.29 The Charter is awarded to protected areas that are following a best practice approach in delivering tourism that takes account of the needs of the environment, local communities and the local economy. The Charter represents a means to put the international guidelines for sustainable tourism development into practice at the local/regional level of protected areas.
- 7.30 The main requirements that the protected area must fulfil in order to apply for full Charter membership include:
- The establishment of a permanent structure for working in partnership with all tourism stakeholders in and around the protected area e.g. a forum.
 - Development of a 5-year strategy for sustainable tourism development in the area.
 - Formulation of an Action Plan to achieve the objectives of the strategy.

Key Requirements

- 7.31 The Charter requires that the following key issues should be addressed:
- Protect and enhance the natural and cultural heritage of the area by:

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- monitoring impact on flora and fauna;
 - encouraging tourism which supports the maintenance of historic heritage, culture and traditions;
 - controlling and reducing tourism which adversely affects the quality of landscapes, air and water; use non-renewable energy; and create unnecessary waste and noise; and
 - encouraging visitors and the tourism industry to contribute to conservation.
 - Improve visitor experiences by:
 - researching existing and potential visitors;
 - meeting the needs of the disadvantaged; and
 - monitoring and improving the quality of facilities and services.
 - Effective communication to visitors by:
 - accurate and appropriate promotion;
 - making good quality visitor information readily available; and
 - providing educational facilities.
 - Increase knowledge of the area and sustainability issues amongst stakeholders.
 - Ensure tourism supports the local residents' quality of life by:
 - involving local communities in the tourism planning process;
 - ensuring good communication between protected area, local people and visitors; and
 - identifying and reducing any conflict.
 - Increase the benefits from tourism to local economy, by:
 - promoting the purchase of local products by visitors and businesses; and
 - encouraging the employment of local people in tourism.
 - Monitor and influence visitor flows to reduce negative impacts by:
 - recording visitor numbers;

- creating and implementing a visitor management plan;
- promoting use of public transport; and
- controlling the siting and style of new tourism development.

Strategy Implementation

7.32 All of these elements need to be demonstrated through the production of a 5-year Sustainable Tourism Strategy. This should include:

- A definition of the tourism area, which may extend beyond the designated protected area;
- A thorough understanding of the visitor market and potential of the protected area;
- Strategic objectives which cover:
 - the conservation and enhancement of the environment, local heritage and distinctive character of the area;
 - local economic and social development within the context of tourism;
 - commitment to the preservation and improvement of the quality of life for local residents; and
 - visitor management and the enhancement of the quality of the tourism product on offer.
- A series of recommendations and actions, and the key stakeholders involved; and
- A methodology for monitoring the effectiveness of the recommendations and actions against the objectives.

Benefits of EUROPARC Status

7.33 There are a number of possible benefits of being awarded the EUROPARC status. These include being:

- A catalyst for strengthening relationships, breaking down barriers and creating partnerships.
- Influencing tourism development positively in and around the Charter Park.
- Helpful internal and external assessment through the evaluation process.
- Raising the profile of the Park and brings local, national and international awareness.

- Increased credibility with potential funding bodies.
- An opportunity to work with and learn from other European Parks in a network.
- Charter Parks benefit from the economic, social and environmental advantages of well-managed sustainable tourism.
- Displaying Charter membership in literature can provide public relations opportunities with visitors and the media.

UK Examples

- 7.34 Examples of protected areas in the UK that have been awarded the Charter Park status include Mourne AONB, Northern Ireland, which was the first UK protected area to be awarded full Charter status, in 2003; the Forest of Bowland AONB, which was the first protected area in England to be awarded the Charter, in 2005; and the Cairngorms National Park in 2005.
- 7.35 The Brecon Beacons National Park is a registered Candidate Charter Park with evaluation in March 2007. Loch Lomond & The Trossachs National Park and The Norfolk and Suffolk Broads National Park are also awaiting evaluation.

Local Practices

Reducing Economic Leakage

- 7.36 As highlighted in the Overview of the Economic Impact of Tourism, leakage can present a considerable cost to the local economy.
- 7.37 Reducing leakage within what is effectively a global economy is not an easy task. Even when looking at a small range of products (from cleaning products, to cars, to TV's) it becomes clearly evident that many of products bought locally on a day-to-day basis are generally sourced from manufacturers outside of the East of England, if not the UK as a whole. Therefore, it is easy to understand why there is considerable amounts of leakage of tourism spend.
- 7.38 Initiatives have been established which seek to reduce leakage of tourism spend at a local level. South Hams District Council in Devon, for example, has provided its support and backing to the South Hams Food and Drink Association, a limited company that has been established with the aim to promote the variety and excellence of food and drink produced within the South Hams area.
- 7.39 The Association, which has 60 members, targets both local residents and visitors alike through its campaign. Not only has the Association managed to raise the profile of local producers, but local

businesses are being encouraged to source local produce first. As an incentive, the buyer is promoted in the 'South Hams Food and Drink Guide', which is widely distributed to visitors.

- 7.40 Ultimately, the key to reducing leakage will be to identify the full range of products that are produced locally which matches the requirements and demands of the tourism sector. These businesses then need to be encouraged to source locally at the first instance. As demonstrated by South Hams, a promotional vehicle should be attached to the initiative in order to clearly demonstrate the incentive to purchasers.

Managing Change

- 7.41 One of the principles behind sustainable tourism is the effective management and mitigation of change.
- 7.42 Hadrian's Wall, as a World Heritage Site, is a sensitive site that has experienced increased visitor pressure. In order to mitigate and better manage these visitor pressures, Tynedale Council has implemented a series of initiatives designed to preserve the fabric of sites whilst also ensuring the continued enjoyment and learning opportunities for visitors. These initiatives include:
- Extending the Hadrian's Wall Bus route – whilst the bus has run for more than 30 years, the Council along with key stakeholders (English Heritage, National Trust, Countryside Agency and Local Authorities) managed to secure additional funding to extend the route, extend the times of availability, introduce a guide service, encourage use by non-car owners locally, and promote other features of interest through 'designed itineraries'. The result has been a tripling of users to 26,000 and a reduction of costs to a point whereby there is now an operational surplus rather than deficit.
 - Hosting a 'Limits of Acceptable Change' conference – designed so that the key stakeholders and bodies responsible for the care and management of the site can agree acceptable levels of change as pressure increases. This includes change to the archaeology, landscape and footpath, and any measures needed to rectify certain situations.
 - Preparing Media and Photographic guidelines – these guidelines were prepared in association with the Hadrian's Wall Tourism Partnership, with the aim being to publicise less well known and visited areas of the Wall through the selection and publication of appropriate images.
- 7.43 This scheme generally applies to a specific designation, though some of the principles adopted could be applied to a wider area.

Visitor Contributions for Environmental Schemes

- 7.44 A debate that has emerged recently concerns the viability of introducing schemes which request tourists to voluntarily contribute to initiatives that are specifically aimed at either counter-balancing their impacts on the environment, or which seek more sustainable behaviours within the environment. These schemes are commonly known as 'Visitor Payback' schemes.

South Hams

- 7.45 An example of a recent 'Visitor Payback' scheme is South Hams District Council's 'On the Right Tracks' initiative. The initiative was specifically aimed at developing a network of Green Lanes which were identified as having great potential as a resource for locals and visitors alike. Visitor Payback was identified as a means of extracting funds from visitors overtly and explicitly for the purpose of developing the initiative.
- 7.46 In this instance, businesses were encouraged to raise funds by placing a voluntary levy on certain products, or asking for a small donation for the use of a particular service. Methods for raising funds ranged from a donation of £0.50 from visitors bringing a dog to a self-catering establishment; £1.00 opt-out levy for every Dartmouth Pie sold; or even a £0.05p opt out levy for cups of tea and ice-cream flakes. Individual business take-up was regarded as successful, with 36 businesses committed to fund raising and 26 local businesses involved in the conservation works. Altogether £17,145 was raised.

Suffolk Coast & Heaths AONB

- 7.47 'Connect' has been developed by the Suffolk Coast and Heaths AONB Unit as a means of forging a partnership between visitors, local businesses and conservation organisations with reference to increasing opportunities for visitors to make a direct contribution to conservation programmes.
- 7.48 The scheme operates as a discretionary donation through 'Connect' businesses. These businesses are identified through the display of a 'Connect' symbol. These businesses collect donations from their customers, and these funds in turn are used to support specific projects within the AONB area.
- 7.49 Donations to 'Connect' are claimed to have funded a range of conservation projects including:
- An electric boat to help the Suffolk Wildlife Trust manage their new Hen Reedbeds Reserve.
 - Management of overgrown heathland to provide a home for the rare silver-studded blue butterfly.
 - Vital improvements to the popular River Blyth footpath in Walberswick.
 - New interpretation panels for Tunstall and Blaxhall Commons.
 - A tree nursery at Snape Primary School.
 - Trail waymarkers for Dunwich Heath.
- 7.50 Overall, it is seen as a means of highlighting the specific sensitivities of the AONB to visitors, and growing awareness and education of the conservation practices required in the maintenance of the

sensitive environment. It also allows visitors the choice of giving a voluntary contribution towards this aim.

Potential of these Schemes

- 7.51 It should be noted that Visitor Payback schemes are a sensitive issue, with both the visitor focus groups ('the Norfolk Coast is not a cheap place to visit anyway'; 'would perhaps consider going elsewhere') and tourism businesses ('it will affect the competitiveness of the area in a very price sensitive market') suggesting that the introduction of a scheme would be viewed unfavourably within the Norfolk Coast.
- 7.52 In addition, whilst there are benefits to Visitor Payback over and above purely financial, opponents of the schemes suggest that the actual cost of setting up the scheme can negate some or all of monies acquired.
- 7.53 The more successful schemes appear to be those whereby visitors and businesses can visibly see or appreciate the benefit from the scheme - i.e. it is going towards a specific project – and it is a purely voluntary act. Any Payback scheme which is compulsory would be viewed as a 'tourism tax'.

Resident Card/Pass

- 7.54 A method of overcoming resident complaints regarding the rise in cost of local services and amenities as a consequence of tourism is the development of a resident's card/pass.
- 7.55 The card, which is only available to residents, includes discounts on a range of leisure facilities, shops, restaurants, and entertainment facilities. The idea is that resident's pay preferential rates for usage of these facilities, which in turn also benefits local businesses and attractions by increasing penetration into the local market at off-peak periods.
- 7.56 This type of initiative has worked well in Canterbury for example where over 20,000 Resident Cards have been issues. St Albans, on a much smaller scale, offer 'resident's weekends' whereby specific discounts are available, and entrance to attractions is free as long as the patron holds evidence that they live within the area (i.e. a driving licence).
- 7.57 Whilst it is generally accepted that tourists pay more for use of the same services, this appears to be a more acceptable compromise than a tourism tax if the promotion is based on **local residential savings**.

Traffic Clearways

- 7.58 A 'Clearway' is a traffic management tool used in certain areas to ease road congestion through temporarily prohibiting waiting or parking on a given section of road (set down and pick-up is permitted).

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- 7.59 The benefit to locals of the system is that it only operates during certain times of the day, usually coinciding with when traffic is at its greatest. Furthermore, it is claimed to have minimal visual implications in that it does not require any permanent lines. Rather, small 'clearway' signs are strategically placed along the roadside.
- 7.60 On the whole, clearways tend to be used in urban areas. However, a rural village in Kent operates a lunchtime clearway to prevent parking during this busy period. In Whitsand Bay, in Cornwall, a clearway operates on a stretch of road (approx. 2 miles) during the main tourist season, i.e. from 1st April-30th September.

8 Workshop & Consultation Summary

8.1 The following provides a synopsis of two workshops held with regards to the benefits and disbenefits of tourism. Altogether, 71 representatives from community, business and environmental organisations were invited to attend the workshops. Altogether 19 representatives attended:

Wednesday 22nd February, Hunstanton

- Bill Boyd, Norfolk Wildlife Trust
- Peter Rushmer, Wash & North Norfolk Coast European Marine Site
- Ron Harold, English Nature
- Gary Hibberd, Norfolk Wildlife Trust
- Barbara Bamfield, Hunstanton Accommodation Association
- Nick Daubney, Borough Council of King's Lynn & West Norfolk
- Brian Everitt,
- Geoff Needham,
- Cyril Southerland, Brancater Staithe Fisherman's Society

Thursday 23rd February, Sheringham

- John Sizer, National Trust
- Peter Wordingham, Blakeney & District Wildfowlers Association
- Robert Simmons, Norfolk Tourist Attractions Association
- John Pugh, North Norfolk Hotel & Guesthouse Association
- Bruce Stratton, Hotels of North Norfolk
- Hilary Nelson, North Norfolk District Council
- Catherine Plewman, Cromer Past Present Future
- Bryan Bullivant, Borough of King's Lynn & West Norfolk

- Tony Shipp - Chair of the Cromer Entertainments Organisation
- Brenda Hare - President of Cromer Preservation Society

8.2 In addition, to ensure a holistic and inclusive approach, all invitees unable to attend were sent a self-completion form consistent with the topics raised at the workshops themselves. Altogether, 19 responses have been received and their responses are included in our analysis.

Environmental Aspects of Tourism

Visitor Behaviour Impacts

8.3 The environmental/preservation groups highlight disturbance as the main issue facing the wildlife within the area. This was particularly true of dog walking, whereby dogs are let off their lead to run freely and therefore disturb nesting sites. It was also true of other types of activity such as kite buggies, paragliders and microlights, which are recognised to be growing in popularity. Reference was made with regards to the loss of Ring Plovers, with the number of nesting sites now estimated at c.100, whereas 20-30 years ago it was closer to c.300. Whilst the loss of nesting sites was not totally attributed to visitor activity, human disturbance was considered to be a contributing factor.

8.4 Erosion of footpaths has been noted, particularly across the saltmarsh at Holkham Reserve, as has disturbance of sand dunes. However, the wardens/managers suggest that this is less of an immediate concern with recent scientific evidence suggesting that:

- The saltmarshes at Holkham are still active and functioning as an eco-system, with the main impact being visual.
- Sand dunes are not supposed to be static systems, and unless there is some direct impact, there is a concern that they could become fixed.

8.5 Tourism businesses are less aware of the direct consequences of visitor activity within sensitive environments. Whilst there was recognition that impacts are likely, there is less knowledge about how these impacts become evident on the ground.

8.6 Likewise, the community representatives generally feel that tourism impacts on the environment are being managed effectively [through the management/conservation organisations]. In this instance, several references have been made to the RSPB's Titchwell Reserve as being an example of how visitor activity and behaviour is being managed.

Visitor Benefits to the Environment

8.7 Both the tourism business and some community groups suggested that visitors already contribute to the environment, particularly through spending on car parking (which in one instance supports a

- reserve warden). Some also rationalised an association between visitors and the ability to increase membership of preservation organisations such as the NWT/National Trust/RSPB. In addition, a proportion of tourism business and community representatives believed strongly that the overall environment of the AONB area would not be as well maintained if it were not for tourism activity.
- 8.8 Furthermore, it was intimated that, in the absence of visitors, conservation/management organisations would lose money, and that this would adversely affect efforts not only to protect the more visited sites, but also other sites within the remit of the organisation. In fact, it was suggested at the workshops that conservation organisations were starting to question the need to protect Reserves that do not have a 'visitor' element.
- 8.9 Environmental wardens and managers, on the other hand, suggest there is a strong need to extract additional funding from visitors. They lay claim to the fact that the funds they receive to protect their sites are disproportionate to the value visitors place on the natural environment; and the actual financial worth of visitors to the economy. In addition, funding is now specifically needed to assist with managing visitor behaviour, which is a direct cost to their efforts to try and protect and promote wildlife populations within the 'protected' habitats along the coastline.
- 8.10 Some representatives posed the question as to whether as much funding would be needed if visitors were not present within the sensitive environment, suggesting that less money would be needed to reverse/manage their effects. In addition, they went so far as to suggest that more could be done to help with the maintenance and up-keep of the area if visitors were not present. They suggested that the community would still value the up-keep of the landscape without tourism, and that the environment would not need as much investment if it were not for the problems that visitors cause.

User Groups

- 8.11 It will be important to distinguish between the types of visitor to ensure clarity. Tourism business groups were generally at pains to suggest that there is a difference between tourists (overnight guests), day visitors, and locals. From their perspective, tourists need to be recognised for their benefits, including the financial contributions that they bring that help the continued preservation of the local environment. They also suggested that local residents, at certain sites, act as 'visitors' to particular sites, and these are potentially the most detrimental users because of a high level of repeat visitation.
- 8.12 One or two environmental representatives mirrored this sentiment, to a certain degree. They suggested that tourists actually have a greater respect for the natural environment and the importance of the local habitats than perhaps some locals. For others, though, the distinguishing characteristics were not related to their duration of stay or their origin, but rather based on a) their volume and b) their activity.

Development Impacts

- 8.13 In relation to actual physical forms, tourism businesses claim that through the development of boardwalks (which they appreciate is necessary to comply with DDA), hides, and the new visitor centre at Cley is in itself adding to changes in the character and nature of the landscape.
- 8.14 However, some community members suggested that this is actually damaging in itself to the landscape, and suggest that certain developments (including boardwalks, hides and car parks) is akin to 'sub-urbanising' the AONB.

Community Aspects of Tourism

- 8.15 In the workshops, there was a general consensus of opinion that visitors do not tend to adversely affect the community and local residents. However, comments received since the workshops through the questionnaire forms, suggest that the workshops perhaps did not provide a completely balanced 'community perspective'. This has now been addressed.

Visitor Impacts on the Community

- 8.16 There was some feeling amongst tourism and environmental representatives that residents do complain about overcrowding and congestion at the busiest tourism periods (August and Bank Holidays), and that residents can resent visitors if they behave badly. Inappropriate parking is mentioned as an example, as is damage to property. However, it was felt that this is generally limited to certain times of the year and by certain visitor groups, with reference made to the fact that, in most instances, the inconvenience is minor compared to the benefits derived from visitor spend.

As a result, agreement is relatively high in regards to visitors underpinning the welfare of the community, including through the support of:

- Public transport – direct support;
 - Local shops – direct support;
 - Schools – indirectly, with tourism providing jobs to ensure families stay within the local area; and
 - Emergency services (one community member noted that there is a local ambulance service on stand-by which they felt would not be available if it were not for visitors).
- 8.17 This belief was supported by anecdotal evidence of conversation with friends who work in various fields (bus drivers, shop-keepers) and by personal experience (builder and fisherman). Nearly all representatives suggested that this far outweighed any of the negative impacts that visitors may create.
- 8.18 However, some community representatives were unconvinced by this argument, suggesting that they feel tourists do little to benefit anyone other than tourism businesses, and that the tax burden placed on

local residents in relation to visitors is disproportionate to the benefits received. Questions have been raised about where is the evidence that forms a direct link between tourism spend and the welfare of the local community, claiming that this is more a case of being an accepted notion than a proven fact.

Nature & Character of the Community

- 8.19 It was generally accepted that visitors can spoil the character and charm of certain areas of the AONB. However, a proportion of representatives were also at pains to challenge this negative and state that visitors can also create a lot of the character that gives the area a sense of place.
- 8.20 On the negative side, comment is made with regards to the volume of visitors, and the fact that residents actually left the Norfolk Coast area during August because it becomes a 'no-go' area for locals. Key activities that were seen to spoil the character of the AONB are traffic and inappropriate parking [along the A149], with the suggestion that birders have a habit of stopping at unofficial sites. However, there was a feeling amongst community members that management and education would alleviate such problems.
- 8.21 On the positive side, was highlighted that the carnivals held across the region would not be as successful if visitors were not encouraged to participate in the festivities (in fact, many visitors arrive specifically for the carnivals that take place). In addition, it was suggested that some of the local settlements (Wells is mentioned by name) needed visitors to help give them a sense of place and character. Out of season, some places become very quiet, almost like ghost towns.
- 8.22 Needless to say, this drew conversation about the problem of second home ownership. This is obviously a key issue, and that a high proportion of blame is directed at tourism by community representatives. However, others debated whether second home ownership is a problem associated with tourism or not. Emphasis is generally placed on un-occupied second homes, rather than self-catering establishments.

Volume Vs Behaviour

- 8.23 Some of the community representatives suggested that volume rather than behaviour is to be considered in relation to community and environmental effects. For the community, this generally manifested itself in relation to traffic [along the A149] and car parking capacity. A few businesses believe the traffic problems are exaggerated.
- 8.24 The environmental representatives suggested that both volume and behaviour are problems. Whilst certain inappropriate activity can be damaging, reference was also made to the fact that even if all visitors to sites behave well, their sheer volume can still cause a lot of damage. The under-lying message appears to be that the damage they cause is unintentional, and a consequence of lack of knowledge rather than any deliberate malice or intent. In fact, one comment suggests that the occurrence of deliberate damage is now much less than in the past.

8.25 In contrast to this, tourism businesses strongly disagreed that neither volume nor behaviour of visitors cause significant problems for either the community or the environment, or that the charm or character of the AONB is being ruined by visitors. Overall, the benefits are seen to outweigh any disbenefits of tourism. They suggested that, as with Foot and Mouth disease, the value of tourism across all sectors will only be realised once it has gone; and with the potential of bird flu to make the coastal area a no-go zone to visitors and sea-level rises threatening both settlements and wildlife habitats across the coast, this realisation is their biggest concern.

Tourism Business Aspects of Tourism

Economic Benefits

8.26 There was a general consensus that tourism has significant benefits in supporting the local economy, though one or two have disputed this claim. The main view held was that tourism is one of the few viable and growing industries within this area of Norfolk, with many of the traditional industries such as farming and fishing having been in decline for years. Even major landowners such as the Holkham Estate have been observed as diversifying heavily into tourism to supplement the traditional income-base of agriculture.

8.27 Both the environmental and community representatives were able to define specific examples of where tourism businesses have helped to support other businesses within the area (local fishermen, builders, arts and crafts). In Blakeney and Brancaster, there was also a direct relationship made between tourism spend in car parks and support for the local community (the National Trust give half their takings from the car park to Blakeney Parish; for Brancaster, the car park is considered to be worth some £8,000).

8.28 Some environmentalists also rationalised further some of the benefits they receive from tourism, and the links with tourism businesses:

- The National Trust has a relationship with seal tour operators whereby if visitors sign up as National Trust members, they have their tour fee returned;
- There is a link between Blakeney Hotel and the Blakeney Historical Society, whereby the Historical Society host walk and talk tours, highlighting the key points of interest, to guests of the Hotel (an example of good practice in relation to tourism business/community projects); and
- Hotels and restaurants are now major clients for local fishing trawlers, for example.

8.29 However, some environmental representatives stated that the income they receive directly from visitors is generally insignificant compared to other sources, and reiterate the notion that the sectors worth to them is disproportionate given the reliance of the industry on its natural resources. They also stated

that with one or two exceptions, their relationship with tourism and local leisure businesses is not strong.

Role of Business

- 8.30 With reference to how the relationship between business and the environmental sectors could be improved, almost collectively (and without prompting) the emphasis was on softer intervention, i.e. education, spreading the word of good practice and behaviour within the AONB. This was mirrored by comments by tourism businesses who suggested that the industry would be more willing to accept and adopt these types of measures than something akin to a 'tourism tax'. The community representatives suggested that there were perhaps not enough examples of where tourism directly benefits the environment or community through the funding of projects.
- 8.31 Interestingly, both environment and tourism business representatives seem to share the sentiment that there should be an acceptance that 'we're all in this together!', suggesting that both believe the other to have a 'them and us' mentality.

Tourism Season

- 8.32 Tourism business and some community representatives were certainly keen to see the tourist season extended, stating that the area needs the additional spend in order for the community to continue to prosper. Interestingly, both suggest that the availability of low cost housing is an issue in that some of the workforce may be forced to leave the area. This is a concern because the tourism workforce are considered to be the 'key workers'!
- 8.33 The environmental contingent and a high proportion of community representatives suggested that their preference would be for fewer visitors to the area, but ensuring that more visitor spend is retained by the local economy. However, this has been suggested to be an 'idealist' position, and unlikely to be achievable. Overall, they would not wish to see a major increase in visitor numbers as they feel this would be unsustainable.
- 8.34 Virtually all agreed that the tourism season is already much longer than it has been in the past, to the extent that it is becoming year-round, with some suggesting that Christmas is now a particularly busy period.

Wider Discussion & Solutions

Traffic

- 8.35 Traffic is a repeated concern amongst the representatives in the second part of the workshop discussion. Key issues mentioned included:
- The increased length of time it takes to travel along the A149 (an example of a 1½ hour journey increasing to 4 hours during the peak tourism season).

- The avoidance of paying car-parking fees by parking in unofficial sites and on the road, blocking through traffic.
 - The policing of problem parking is minimal.
 - The lack of coach parking, and the fact that some parts of the A149 are definitely not suitable for coach vehicles.
- 8.36 In terms of public transport, the Coastal Hopper was mentioned as an asset. However, both this and other services are generally regarded as too infrequent, and they do not operate at times when visitors would want them to i.e. too early a last service. This is said to affect the ability of the public transport to be a true alternative to the car as a means of moving around the AONB.
- 8.37 The possibility of a Park&Ride schemes, such as in Norwich, has been repeatedly introduced in relation to the AONB, though bus frequency and routes would still be an issue.
- 8.38 However, others suggested that cars were engrained within society and that the problems this created within the AONB is more of a reflection of modern society. In addition, it is suggested that the ability to influence use away from the car is limited because of the flexibility the car offers in comparison to alternatives. Others stated that the problem would only be alleviated if hard decisions were taken.
- 8.39 The provision of walking and cycling routes is mentioned as an area that could be improved, though there is comment that cycling should not be encouraged along the A149.

Raising Awareness

- 8.40 In reference to environmental impacts on sensitive sites, it appears that there is a general lack of awareness regarding some of the more fundamental impacts of visitors, including amongst visitors and tourism businesses. The consensus view was that visitors were generally unaware of the problems they cause, and that once the effects of their behaviour are explained to them they generally agree to stop or change. However, the volume of visitors mean that it is impossible for the current wardens and managers to intervene effectively in every situation.
- 8.41 Another issue that has been raised is with reference to the fact that not all activities have long-lasting effects and that there is a lack of knowledge over which activities cause the most damage. This is an area that perhaps needs further investigation.
- 8.42 The potential of additional manpower has been raised, with the possibility of using volunteers to more effective use being offered as a potential solution. However, this has not been received entirely positively by the environmental contingent, with concerns over health and safety mentioned specifically as a barrier.

8.43 Overall, 'education' in its widest sense appeared to be the main means with which the groups felt that visitors could be made more aware of the sensitive nature of the Reserves. Face-to-face contact and group sessions were regarded as much more effective than signage and leaflets. An example of businesses in the Lake District contributing to an education and awareness programme was offered as an initiative introduced elsewhere that is considered to be good practice. Examples of school education trips and out-reach programmes were mentioned also (such as operated by the National Trust), with the point raised that perhaps better understanding could be achieved through creating some form of out-reach programme for tourism businesses in particular. This was warmly received by attendees to the workshop.

Maximising Benefits

8.44 The relationship between visitors and their contribution to the environment is a moot point. Both business and some community groups challenged the role of Reserves in 'promoting' tourism, suggesting that by their very nature they 'attract' visitors. In response, the National Trust is at pains to suggest that certainly the National Trust [but also other Reserve management organisations] are open access organisations. Whilst this obviously did involve some visitor promotion, it is not considered to be a core focus of their activity and rather that site preservation and management are their key concerns.

8.45 At the workshops, it was generally agreed by the majority of representatives that any kind of tourism tax would not be welcome, with the tourism sector having to work in a very competitive environment particularly with the opening up of further overseas destinations and the 'guaranteed sunshine' that these destinations present. The underlying message was that anything imposed upon business that would reduce their competitiveness would also reduce the effectiveness of tourism to continue to contribute to the welfare of the local economy.

8.46 A voluntary levy-option linked to projects was also discussed at the workshops (i.e. Visitor Payback). Whilst one or two thought that it was an interesting idea and less controversial than a tourism tax, others felt that it was not needed or not really appropriate for this area. The concept of it being 'voluntary' was not accepted as a means of softening the effects, and there was still a concern that it would act as a tax.

Partnership Approach

8.47 There is some concern that community groups are not being consulted sufficiently in relation to the tourism strategies and policies that are adopted locally. There is a feeling that their views are not represented, and this has resulted in certain changes which in their view are not appropriate changes in relation to the wider character of the AONB. Therefore, the community representatives would welcome the opportunity to share their views on a more 'official' basis.

8.48 Likewise, some tourism businesses are genuinely unaware of impacts that their visitors are having on the sensitive environments within the AONB. Therefore, they suggest that they would welcome an opportunity for further dialogue with management/conservation organisations in order to extend their knowledge.

Conclusion

8.49 The workshop and consultation process has identified some key Issues that are leading to certain problems related to visitor presence within the AONB.

8.50 Whilst there is general consensus that visitors have a positive economic value within the area, observations made by community and environmental representatives have helped to add weight to certain negative effects of visitor behaviour. This includes:

- driving up the volume of visits on Nature Reserves which is leading to damage and disturbance on important wildlife habitats;
- being a key factor in the high levels of traffic experienced along the Norfolk Coast road;
- contributing to (or causing) increased second home ownership;
- spoiling aspects of the AONB that make the place special; and
- encouraging development that is actually to the detriment of the wider environment.

8.51 The consultation process has highlighted how emotive tourism can be, and that it can create a high level of polarised views. This mainly revolves around the issue of tourism spend; how this filters through the economy to support jobs/business as claimed; its overall contribution to the conservation/management activities of environment organisations; and how the value of tourism is actually translating to community welfare support, if at all.

8.52 A key finding of this exercise is the high degree to which there is perceived to be a 'them and us' attitude amongst the other groups, and yet some of their views actually share some common ground. It is felt that this perspective is held due to a lack of understanding rather than being a case of strong disagreement.

8.53 Ultimately, therefore, there appears to be a perceived barrier to communication. Where these barriers have been overcome, there is a genuine feeling of co-operation, where benefits are accrued by all stakeholders; or, at the very least, there is a shared understanding as to why certain decisions are made. Moreover, there appears to be a genuine desire for strengthening the understanding through co-operation and partnership.

9 Visitor Focus Groups

Introduction

- 9.1 Two focus groups were organised with visitors to the Norfolk Coast and the AONB in Leicester and Norwich.
- 9.2 The respondents were selected from an EETB mailing list and were asked if they had visited the area before being asked to attend.
- 9.3 The groups were told that:

The purpose of this study is to help define tourism behaviours along the Norfolk Coast. Tourists undoubtedly bring a variety of benefits to the Norfolk Coast area. However, we are also investigating some of the impacts that visitor behaviour has on the natural environment and local community.

It is hoped that the findings of this study will ensure that the tourism sector along the Norfolk Coast is developed in a way which allows visitors to maximise their experiences, whilst also encouraging them to behave in a manner which is more sensitive towards the local wildlife and natural environment; and also the residents who live along the Norfolk Coast.

- 9.4 Both groups were well attended (10 respondents in Leicester and 9 in Norwich) and lasted for 1.5 hours each. The groups were moderated by YTB Market Intelligence.

Visitor Awareness

- 9.5 In both groups, visitors described the Norfolk Coast as being spacious, open and unspoilt. The respondents cited personal experiences of being spiritually uplifted, having a sense of discovery and experiencing an area with a feeling of freedom.
- 9.6 The idea of space was recurrent with some direct quotes were that the area gave you “space to think and space to talk” and that you could “walk for miles and not see anyone”.
- 9.7 In terms of distinctiveness, the welcome from the residents and communities was given as an example and the majority of both groups agreed that the area offers very good local food and drink (e.g. freshly caught seafood and independent pubs/micro breweries).
- 9.8 Also the mix of outdoor tranquillity but with access to small shopping centres with unique shops was given as something that was potentially unique.
- 9.9 The seal population was seen as a popular attractor and the amount of Nature Reserve with people citing examples of how they had been walking through woodland areas and seen snakes and small mammals running around.

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- 9.10 Some people noted that the area was good for bird watching with some specific examples of unique birdlife there.
- 9.11 Also, a specific beach where 'the sea goes so far out you can't see it anymore' was brought up on a number of occasions as something special.
- 9.12 The majority of respondents visited the area to simply experience the unspoilt landscape and sense of freedom. Most indulged in eating and drinking and were emphatic that local food and drink was essential to their visit (even if they had to pay more for it.) Some had taken bikes in the past but felt that the roads in the area were too dangerous for cycling, particularly with young children.
- 9.13 Most people took part in some form of walking and showed an interest in the local wildlife and environment but more as a backdrop to the ambience rather than a specific interest. (However, it was noted that if they knew more about it through promotion they would have a greater interest.)
- 9.14 Most toured the area by car, although there was some use of the 'Hopper' bus. (The transport issues are covered further on in this report.)
- 9.15 Generally there was no recognition of any specific areas of environmental sensitivity. All respondents noted that congestion was a problem in the summer and when prompted most cited the erosion of the coastal road as an area of concern. (One respondent knew about the SSSI's and informed the group at which point the group said they would be interested in knowing more and in showing respect for the area if that information was promoted to them in a non-scientific and sympathetic way.)

General Visitor Impacts

- 9.16 From their own perspective, the majority of respondents had not noted any general negative behaviour during their visits and in fact suggested that the type of person who visits that area would be respectful of the landscape and generally thoughtful of others.
- 9.17 One person gave an example of anglers driving down to the riverside in one place and churning up the ground into mud. Another respondent had found some broken glass on the beach and questioned if anyone was patrolling the area for such things and in fact as the conversation developed, all agreed that overflowing litterbins was a problem but that it was a problem everywhere they went.
- 9.18 There were a couple of individuals who perceived that dogs on the beach were a problem but were in the minority and did agree that if given a specified area of the beach in which to exercise, then this would not be an issue.
- 9.19 One person said they had seen a motorbike using a cycle path once.

Changing Behaviour

Environment

- 9.20 As with the general impacts, the majority of respondents did not think they had seen any negative behaviours impacting on the local wildlife and environment. All were aware of the fact that the landscape was covered by Nature Reserves but did not know that there were 12 specifically or that there were 28 SSSI.
- 9.21 When told this, they showed an interest and all agreed they would like more information on them but in a friendly way and in a way that educated them but was still welcoming of visitors to the area.
- 9.22 When given the information on what was considered to be negative behaviour, most people expressed surprise that fires on the beach were negative and in fact suggested that this was an excellent way to end a trip and to keep interacting with the environment.
- 9.23 Also, some of the other examples of activity given as negative such as paragliding and kite-buggying were not seen by the respondents as particularly intrusive and could in fact be an attractor to the area for the enthusiast and the general public. They all agreed that the beaches were vast enough to incorporate the needs of all these users, if given areas in which to practice their sport or activity.
- 9.24 Communication with people regarding the area is not going to be easy with many people wanting to know about the environment and the local wildlife but in a welcoming way. Also, the format for the best way to communicate had no general consensus and relied largely on the type of visitor e.g. leaflets in self-catering accommodation is fine for staying visitors but not for the day visitor. The most popular suggestions were:
- All agreed that some signage informing the visitor on the area would be a good idea but only if constructed in a sympathetic way to not have negative impact on their visit or to turn the area in to a “theme park”.
 - Way marked trails through the landscape with points of interest highlighted on a map and/or by a coloured post. The families in the groups liked the idea of this post having a small brass plate for rubbings on it depicting a leaf, animal or other natural element to encourage environmental knowledge and to keep the children entertained on a long walk.
 - One suggestion, cited as an example experienced elsewhere, was to have small speakers in the forest which could be activated by a button which would tell you about the area you were in or an interesting fact about the place you were standing. This would again allow a visitor to interact with the environment whilst educating. This also moved on to an idea on incorporating hides in the landscape with CCTV monitors in pointing at nesting sites or similar to allow people to see the wildlife without going too close to it.

- Other more traditional forms of communication were suggested such as a visitor guide, trail maps with areas of interest marked and a pack of things to see and do.
- Only two people had used the existing website but all agreed that if it was visitor focussed with images and suggestions on what to do they would all use it a lot more.
- The development of a visitor centre or education centre was seen as an excellent way of both educating and as an attraction into the area. (In the transport section a visitor centre was then seen as the ideal place for a “Park and Ride” stop.)

9.25 The majority of respondents reacted very positively to the idea of a guided walk through the landscape pointing out wildlife and areas of sensitivity and would all be encouraged to participate. The families suggested one for children as well with some activities relating to educating them as to the sensitivities of the environment or just on what is there in terms of wildlife.

Communities

9.26 The positive impacts to the local communities were quite simply cited as employment and income.

9.27 Most respondents did not really see any negative impacts to the communities. There were some individuals thinking that parking in front of people’s houses and overcrowding in pubs might be a problem but this was not fully supported. It was again suggested that the type of visitor currently visiting the area is generally respectful and mindful of others and would not knowingly engage in negative behaviour.

9.28 In both groups the issue of second homes came up and prompted a mixed debate on the benefits to the local economy and the negative impact on local residents having to move out because of increased house prices. This is not specific to the Norfolk Coast and AONB and was left unresolved.

Traffic & Sustainable Transport

9.29 The area of transport is where we saw the only real difference between the groups in attitude to public transport and car use. The visitors from Leicester would be far harder to persuade not to use their cars than the Norwich group. In fact, the Norwich group expressed frustration at their not being adequate public transport links into the area and said they would use them if they were there. It was also agreed that in fact it was always the final part of the journey that was the most problematic and they would welcome anything that could alleviate that.

9.30 Most people in the Norwich group simply did not know about the Hopper bus that operated within the area and thanks to a couple of people who had used it, will now use it in the future. This highlights a simple need for adequate promotion of the service.

9.31 The most popular suggestions were:

- A park & ride car park (incorporating a visit to the suggested Visitor Centre and to areas of interest).
 - One travel card to take multiple journeys on a number of different routes.
 - Open top bus.
- 9.32 Public transport was seen by families as very positive and cited as an extra “adventure” as part of the trip that most children loved doing. However, this group also had certain barriers to usage, particularly in relation to the amount of items that they had to carry.
- 9.33 Most respondents were open to the above suggestions but there were a couple of older couples particularly who did state that they would always use the car. These were both from Leicester.
- 9.34 Self-guided walks, specific walking tours, walks which include specific stops/points of interest/pubs, were all seen as positive ways to get people walking more, especially with the incorporation of new technologies on the self guided walks such as GIS and “plug-in” points for headphones to tell you about the area.
- 9.35 Cycling was seen as a more difficult activity in the area due to the danger on the roads, however some suggestions for more dedicated cycle trails through the woods and landscape would encourage more cycling. Also, a cycle trailer on the Hopper was seen as a positive idea and more bike-hiring facilities.

Visitor Payback

- 9.36 The whole area of visitor payback and tourism levy’s raised some interesting debates about taxation. It was generally accepted that in countries with a lower cost of living, a tourism tax was fine as it helped boost the economy, however in this country it was generally felt that visitors here pay over the odds anyway for most things and an extra tourism levy would be very negative and encourage people not to visit.
- 9.37 The most popular suggestion was the following:
- At areas of visitor congregation (e.g. car parks, place of interest etc.) information boards were erected sympathetic to the landscape, which informed the visitor of what the AONB was in terms of its importance to wildlife and the unique elements of its environment. Then the board should go on to say that there is need to maintain this area for future visitors and maybe cite some specific projects such as footpath rebuilding, funding of a litter warden on the beach etc. that all needed financial support. At the bottom of the board there would be a donation box and suggested donation.

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- Following on from this, another popular idea was to introduce a Friends of the AONB group in which visitors were invited to volunteer to help maintain the area e.g. on the information board have an announcement that “Tonight at 6.30pm you can volunteer to join others in litter picking on the beach” etc. Following this there could be suggestion that if you could not participate directly, a donation towards this activity would be gratefully received.

9.38 Both ideas were spontaneous from the group and seemed to generate real interest and enthusiasm.

Summary

9.39 The main summary from the groups was to keep encouraging the “right” type of people to visit, as the current visitors are respectful of the area and would react positively to helping to maintain it.

10 Conclusions

- 10.1 From our investigations, it has become clear that the pressures created by visitors within the Norfolk Coast AONB are having both positive and adverse effects from an environmental, economic and community perspective.

Study Value

- 10.2 The value of this study is that it has essentially instigated, through its ambition and its content, a new process for evaluating both the costs and benefits of tourism within a given destination, with analysis of all elements and stakeholders placed side-by-side.
- 10.3 Phase I of the study process identified that both the general costs and benefits of tourism are well known. However, most existing studies highlight the economic benefits in order to demonstrate the value of tourism as a sector, particularly within rural environments. The reason for this is that tourism, as a sector, has historically lacked recognition as a tangible contributor to the prosperity of economies, and hence the need to place a real value both on the sector, but also in terms of driving environmental conservation.
- 10.4 However, in the continuing adoption and adaptation of tourism to ensure that it is a 'sustainable' sector, it is appropriate that this value is placed within a wider context, and balanced against the impacts and effects of tourism on the environment and community within the destination. This is essentially the outcome of this study in relation to the Norfolk Coast AONB.
- 10.5 The process of bringing together evidence of tourism impacts and effects, and relating them to the Norfolk Coast AONB has not been straightforward. Despite a growing awareness that the impacts occur, there is no simple means of quantifying either the costs or the benefits, even in reference to economic benefits due to the limitations inherent in any models used.
- 10.6 However, through the process of Phase II, the views and opinions of all of representatives of all of the key stakeholders have helped to define how tourism impacts become manifest within the Norfolk Coast AONB; the severity of the effects that these impacts cause; and how visitors and visitor behaviour could be managed better in the future. The information obtained through the representatives has therefore been invaluable in determining the appropriate weight to be given to each of the known impacts.

Tourism Benefits

10.7 The benefits of tourism within the Norfolk Coast AONB can be summarised as:

Environment

- Areas of high landscape value have a strong association with tourism, and tourism itself can be a spur to ensure that these landscapes continue to be conserved in the future.
- Management/Conservation organisations benefit from visitor spend, including car park/entrance fees, membership subscription, and other discretionary spend (catering, retail).
- Visitors can be educated about the environment, its qualities and the need for conservation.

Economic

- Tourism is one of the few economic sectors that has the capacity to match conservation aims and objectives of the AONB (i.e. tourism relies upon the maintenance and up-keep of the landscape qualities and environmental character).
- Tourism within the Norfolk Coast AONB has a direct economic value estimated at £132.9 million, which after induced/indirect spend increases to £163.2 million.
- This spend is estimated to support 3,664 actual jobs within the Norfolk Coast economy, which is the equivalent of 16% of the population of the AONB which is of working age.
- Tourism spend supports many businesses within other sectors of the economy, ranging from construction, to retail, to arts and crafts for example.

Community

- Without the tourism sector, and the spend tourists generate, the community would lose a key employment sector. This in turn would lead to further losses within the community as workers move away in search of employment.
- A level of facilities and services that serve the community rely upon the additional spend that tourism brings to make their business viable.
- Anecdotally, the welcoming nature of the community is a key asset of the Norfolk Coast tourism offer. Likewise, positive interaction between residents and tourists can lead to a greater sense of pride and potential for volunteering.

Tourism Costs/Disbenefits

10.8 The costs/disbenefits of tourism within the Norfolk Coast AONB can be summarised as:

Environment

- Different visitor types/behaviours are observed to have a damaging effect on certain natural attributes of the AONB, especially in relation to its wildlife which has specific conservation requirements and designations.
- The additional resources required to 'manage' visitors has been to the detriment of other conservation practices.
- The contribution of visitors to the management of the landscape is not considered proportionate to the value that is placed on the natural landscape in terms of its appeal to visitors.
- Certain tourism developments, or developments aimed at providing better access for tourists, are being viewed as a means of 'sub-urbanising' the landscape.

Economic

- There appears to be a reliance on tourism as a sector that underpins the well-being of the economy. This could be to the detriment of the economic sector as a whole if a sudden down turn in tourism fortunes is realised.
- The economic gains from tourism expenditure have seen local businesses deliberately gear their provision to suit a higher spending visitor market rather than local markets, whereby price is artificially inflated beyond the means of local residents.
- Tourism employment is considered to be low paid, low skilled, seasonal and offering poor working conditions, with many people employed within the sector coming from outside of the AONB including migrant workers to fill certain workforce shortages.

Community

- The presence of tourists and tourism day visitors is pressurising certain amenities and infrastructure designed for local needs – the volume of visitors experienced through the year has an impact equivalent of adding a further fifth of the current resident population on a permanent basis.

- Traffic volume is increasing pressure on local roads, which is to the detriment of both local residents and perceptions of visitors.
- Tourism is perceived by the local community to be at the forefront of the increase in second home ownership observed within the Norfolk Coast AONB.

Key Issues

- 10.9 The value of tourism to the Norfolk Coast AONB is considerable, and it remains one of the few sectors of the economy that is potentially compatible with the aims and objectives of preserving the high quality landscape that the Norfolk Coast offers.
- 10.10 However, the volume of tourism is such that undue pressure is increasing on both the sensitivities of the environment, and upon the community in which tourism integrates. The volume and behaviour of visitors at some reserves is now at a level whereby certain conservation practices are being compromised. In addition, the views of certain community representatives suggest that their tolerance threshold with regard to tourism intrusion is reaching its capacity.
- 10.11 To be truly sustainable, tourism stakeholders must accept that future growth of tourism within the AONB must be sufficiently controlled and managed to allow for the introduction of more effective measures designed to mitigate these impacts. This study has identified a number of key issues that will need to be addressed if this goal is to be attained. These include:
- To gain a true understanding of the nature, characteristics and motivations behind tourism visits.
 - To understand the effects that different types of visitors and behaviours have on the most sensitive environmental sites within the AONB.
 - Through this understanding, to initiate appropriate management techniques to ensure negative impacts are minimised.
 - To engage tourism businesses to highlight their role in the process of developing a sustainable destination, following a partnership approach for mutual benefit.
 - To raise awareness amongst visitors as to the possibilities for them to engage in appropriate behaviour.
 - To promote and develop sustainable transport to a point whereby alternatives to car use become realistic options, matched by initiatives that reduce the appeal of driving on the Norfolk Coast road (A149).

- To ensure that the maximum economic gains from tourism are realised by offering a coherent product, based on quality and local distinctiveness that filters through the local supply chain.
- To actively seek a partnership approach between the stakeholders involved in tourism to ensure that tourism actively supports local communities.

11 Recommendations

11.1 Having identified some of the key issues to be overcome in the attainment of the Norfolk Coast becoming a sustainable tourism destination, the following section recommends initiatives and areas for further investigation for the Norfolk Coast Partnership.

Key Issue: Visitor Research

11.2 This study has revealed a fundamental gap in information provision, namely a full appreciation and understanding of tourists and day visitors to the key sites along the Norfolk Coast AONB.

11.3 This lack of visitor research is an issue throughout the northern reaches of Norfolk, where the only recent visitor survey has been completed is for the Norfolk Broads. Therefore, we would recommend a partnership approach with local authority organisations and other key stakeholders in order to achieve a more complete picture of visitor characteristics, but to also allow for certain economies of scale as both quantitative and qualitative research can be expensive exercises.

11.4 In relation to effective visitor management, visitor research is considered essential in terms of helping to firmly identify the aspects that drive visitation; what activities visitors like to do once within the area; and how they tend to interact with the environment. More specifically, it will help to test the viability of some management techniques, and to evaluate some of the likely trade-offs that will be needed in order to influence changes in behaviour.

11.5 The Visitor Focus Groups conducted in Phase II have helped address some of these issues on a qualitative basis, for instance in gaining an understanding as to the barriers for using walking and cycling routes (lack of awareness/inappropriate routes); methods for encouraging use of public transport (Park&Ride initiative/make it family friendly/hop-on hop off); and current views of environmental impacts (they are generally unaware of the effects their behaviours have).

11.6 Qualitative research is useful at getting to the root of certain issues, and therefore should be used to test certain assumptions. However qualitative research should not be used as an alternative to the more traditional quantitative research. Quantitative research is more adept at determining specific characteristics (age, gender, life-stage, spend), identifying reasons for visits (sightseeing/wildlife/escapism/food and drink); and adding weight through pure numbers to certain arguments (areas of satisfaction/dissatisfaction; likelihood of visiting in the future; areas for improvement). Ultimately, both have their advantages, and they tend to work most effectively when combined.

11.7 It has been beyond the scope of this study to engage both types of research. We would recommend that quantitative research is also conducted on a reasonably regular basis (bi-annually or tri-annually)

in order to detect any changes in characteristics of the visitor market. To act as a guide for budgeting purposes, qualitative research costs approximately £2,000 per group, with 3-4 groups generally required to test issues effectively; quantitative research is between £20-£30 per interview for face-to-face interviews using qualified researchers, with a sample of 1,000 recommended if sub-sector analysis is to be deemed statistically robust. However, advances in technology and programmes means that new forms of surveying are being introduced, allowing for on-line entry and immediate analysis. The ability for utilising this technology should be investigated further in conjunction with tourism businesses. Nevertheless, it would provide a more cost effective means for market research, data collection and analysis.

Recommendation 1 - Quantitative & Qualitative Research

R1.1 To conduct qualitative and quantitative visitor research at regular intervals as a means of identifying and monitoring visitor characteristics, motivations, behaviour patterns, and preferences; and testing the value of certain initiatives.

R1.2 To explore the potential of utilising new technologies for making visitor research more cost effective.

Key Issue: Understanding Visitor Behaviour Impacts & Effects

- 11.8 Minimising the behaviour impacts on sensitive sites within the AONB is a key objective. To ensure that appropriate management techniques are adopted, there needs to be a greater understanding of how observed behaviours actually effect the wildlife.
- 11.9 It is encouraging that current visitor impacts are being observed and recorded within certain sensitive locations within the AONB, and furthermore that these are being analysed and interpreted by the EMS Conservation Manager.
- 11.10 However, we feel that the current method for observation collection, and subsequent analysis of the findings, would be strengthened through the following recommendations.

Statistical Sampling

- 11.11 There is a suggestion that the information gathered on visitor impacts at the Nature Reserves is not statistically representative. Most wardens suggest that the level recorded is just the 'tip of the iceberg'. In addition, there may be an inadvertent bias towards highly visual activities.

- 11.12 In order to create a more meaningful level of information on visitor impacts, it is recommended that a systematic approach to measuring impacts is conducted through statistical sampling.
- 11.13 This would require the selection of certain dates throughout the year in which to strictly record visitor impacts. These sampling dates will need to be representative of all types of visitor volume (low, medium, high) for each season.
- 11.14 This type of approach would ensure that the analysis would be statistically robust to act as a benchmark for identifying the behaviours that cause the most amount of disruption/damage, and to allow for any specific changes over time to be tested for significance. To assist with the data gathering, it may be possible to utilise volunteers to ensure sufficient resourcing.

Measuring the Severity of Impacts

- 11.15 To reiterate our comments made within the report, we would also recommend adding a measure to monitor the severity of the impacts of visitors, namely whether the impacts have a:
- Low level of consequence - with species returning immediately after the offending activity has passed;
 - Medium level of consequence - whereby species return eventually but sometime after the offending activity has ceased; or
 - High level of consequence - whereby some or all of the species are deterred from returning to the site because of the offending activity/or suffer injury as a result.
- 11.16 We recognise that it may not be possible to record the 'effect' in every eventuality. However, if this can be collected and analysed, it may be possible to associate a specific environmental cost of tourism in terms of changing behaviours and patterns. In particular, we feel that this evidence would allow wardens and site managers to earmark the detrimental qualities of tourism impact, i.e. stating that XX nests have been abandoned, or the populations of XXXXX have diminished. This would add greater weight to the necessity for specific management actions which can be presented as an evidence-based approach.
- 11.17 In addition, it would also act as a benchmark to identify how certain management techniques can change the fortunes of the wildlife population where they are at greatest threat.

Consistency Across all Reserves

- 11.18 From the perspective of the wider AONB, it is noted that not all of the sensitive sites, as defined in the Visitor Management Plan, are being monitored. The majority of the monitoring activities are restricted to areas within the EMS and based on the observations on Nature Reserves only, although other sensitive areas are noted within the previous NCP Visitor Management Strategy.

- 11.19 Overall, we would recommend that the observations are recorded at specific sampling points (i.e. close to access points) for all sites that are defined as being 'sensitive'. At the very least this should include all 12 of the Reserves. This is to ensure a consistency of approach, and to make certain that appropriate management techniques are identified. Also, it will allow for the monitoring of the success of any initiatives introduced, and changes in behaviour patterns across the whole of the AONB that occur as a result.

Recommendation 2 – Techniques & Methods

- R2 To strengthen the value of the current visitor behaviour monitoring system through introducing:**
- a systematic approach to sampling.
 - a measure that defines the severity of the behaviour impacts in terms of effect.
 - a monitoring system across all Nature Reserves/sensitive locations within the Norfolk Coast AONB.

Key Issue: Visitor Management Techniques

Engage with visitors at the point of contact

- 11.20 We acknowledge the policy of 'No Promotion' of the AONB as an attempt to limit the levels of new visitors. However, we feel that an opportunity to engage with visitors is being missed through this policy. Furthermore, comments from the consultation process suggest that this is being undermined by other types of promotion that exclude messages about specific sensitivities and/or are not from official sources.
- 11.21 With the exception of those people who visit the visitor centres of Cley-next-the-Sea (NWT), Holme (NWT), and/or Titchwell (RSPB), the awareness amongst many visitors of the specific environmental sensitivities is considered to be low, with little obvious signs that one is entering a "protected area". Ultimately, visitors do not wish to take part in any activities that would spoil the aspects that they find most appealing. However, the overriding message from visitors was that if they knew about these sensitivities, then they would be more conscious of the need to act responsibly.
- 11.22 In this regard, the pre-visit information-gathering component of the tourism process is particularly important. It is during this stage that tourists effectively 'buy-in' to an expected experience.
- 11.23 It is generally accepted that for many domestic tourism trips, a large proportion of the motivational messages come from previous experience and word-of-mouth recommendations, with only marginal reference to actual 'marketing' literature or promotion. Written marketing and promotional literature is more useful in re-affirming the expected experiences, introducing accommodation, and highlighting

certain things to do and see. It is here that positive and yet sympathetic messages regarding the quality of the natural environment can be highlighted, and advice can be given as to how the enjoyment of the AONB can still be maximised by adopting certain behaviours – i.e.:

- highlight the Norfolk Coast's wildlife conservation designations, and the fact that the area's beaches, salt marshes and wooded zones are home to a wide array of rare bird species, but also suggesting that the best places to 'really discover wildlife' are within the Reserves of Titchwell and Cley through the Visitor Centres (Visitor Centres then introduce certain elements that they can do to help promote the protection of bird life within the AONB);
- messages relating the quality of the beaches, and that visitor help is needed to maintain this (keeping to boardwalks where available, spotting saltmarshes and dune systems - including pictures and descriptive text - and the keep beaches tidy policy - taking rubbish back to their accommodation as part of recycling initiative);
- messages relating to the fact that travelling life can be made less stressful – not having to find a parking spot, avoid expensive parking fees – by utilising public transport or by parking away from the most congested areas (i.e. south of the A149).

11.24 In essence, the benefit of including messages such as these within the information gathering stage is that visitors are made aware of certain expectations with regards to their own responsibility for managing the environment; and also that certain options are available which will assist them in this aim from the outset.

11.25 Web-based information, in particular, is a growing medium that visitors tend to rely upon for sources of information. A visitor focused web-page/pages with portals from accommodation establishments, attractions, and other information gathering sites, would aid the Partnership in imparting relevant messages.

11.26 If the information can be positioned and presented appropriately, the messages should enhance visitor expectations, regardless of the reason or motivation for their visit.

Recommendation 3 – Engaging with Visitors at Point of Contact

R3 To engage with visitors at the initial point of contact. This is to ensure that they 'buy-in' to an experience which has conservation and wildlife protection at its heart.

Utilise Visitor Centre Network to Disseminate Conservation Messages

11.27 Interactive learning and education is described as being the best form of disseminating important messages of conservation to visitors once at the destination.

- 11.28 There is evidence of this occurring on certain Nature Reserves within the AONB already, with Titchwell Visitor Centre running an array of talks throughout the different seasons; NWT have learning points at the Cley and Holme Visitor Centres, with the information offering at Cley to be extended through the new development programme; and the National Trust, which has a specific education centre at Brancaster (Millennium Centre).
- 11.29 With evidence of a growing interest in wildlife conservation and protection, reinforced by the growing coverage of wildlife and wilderness on television programmes (particularly the Bill Oddie fronted 'Springwatch'), the value of these Centres is likely to be enhanced in the future.
- 11.30 The use of these centres should be promoted to all markets that will seek to undertake a trip to the more sensitive/coastal sites of the AONB, be it as a casual user or a user from a specific activity group.
- 11.31 This will allow the conservation organisations to engage with all groups that interact with the areas of protection.
- 11.32 The spread of Centres is felt to be sufficient, though the location at Holme and Cley can be easily bypassed. More clearly defined signage would allow for greater recognition of the availability of the Centres, which in turn will draw attention to the fact that the site is of conservation importance. The centre at Cley is being re-developed, and is likely to become much more prominent than at present. We also feel that, to become an effective visitor management tool, the visitor centre at Holme has to become much more visible to visitors.
- 11.33 In addition, the Holkham Reserve, which is arguably the most visited of all the Reserves, does not have its own Visitor Centre, with welcome boards acting as the main site awareness techniques. We are aware that English Nature has previously investigated the potential for a Visitor Centre to Holkham Reserve, and that this remains a possibility in the future.

Recommendation 4 – Utilise Visitor Centre Network

- R4.1 To maximise the interactive learning and education potential of Visitor Centres to all types of visitor.
- R4.2 To investigate ways of enhancing the visibility of the Holme Visitor Centre.
- R4.3 To encourage more effective means of presenting Holkham as a 'Nature Reserve' to its visitor audiences.

Investigate the potential for out-reach talks & guided tours

- 11.34 Engaging with more casual observers and visitors appears to be based on an ad hoc basis; i.e. generally when conservation work is being conducted in the proximity of visitor activity; or when

- wardens react to prevent inappropriate behaviours. However, if visitors could be engaged before they enter the site, then it is envisaged that certain behaviours could be prevented in advance of a visit.
- 11.35 Out-reach talks and presentations by conservation/management organisations could be one method of trying to engage with visitors outside of the Visitor Centres. These talks could take place within the larger hotels and holiday parks. These types of pre-activity information talks have been observed to be popular in relation to large-scale conservation programmes (Great Barrier Reef, Introduction to Snakes and Spiders in the Australian Outback). However, they also usually have a light-education/entertainment angle, and are conducted in the evening which has potential spin-offs for the establishment itself.
- 11.36 In addition, it is recommended that the potential for more official series of 'Reserve Watch'-style talks and guided tours are conducted in situ of all of the popular Reserves during busy tourism periods.
- 11.37 Both of these initiatives would give visitors an opportunity to understand wildlife conservation in action, observe what is actually trying to be achieved through certain initiatives, and gain a summary of how their involvement could assist in this process.

Recommendation 5 – Investigate the potential for out-reach talks and guided tours

R5.1 To investigate further the potential for 'Nature-Watch'-style guided tours.

R5.2 To investigate the potential for outreach talks at strategic locations – large accommodation establishments, which also have an large neighbouring supply of accommodation establishments.

Maximising the use of volunteers

- 11.38 The study has revealed that volunteers are already being utilised by all of the management organisations within the AONB. However, there may be further potential for using volunteers strategically, particularly in relation to managing and monitoring visitor behaviours.
- 11.39 The lack of resources for the policing of visitor behaviour is a common complaint of Reserve wardens. Therefore, it feels an appropriate linkage to try and make better use of volunteers in the control of visitor behaviours at peak tourism times. This will need to be investigated further with the environmental management organisations, with volunteer time, by definition, being discretionary and therefore cannot always be relied upon.

11.40 Other sources of volunteering include ‘volun-tourism’, which is growing in popularity as a type of holiday. The RSPB have some residential accommodation for the purpose of accommodating long-stay volunteers (up to 6 months), and also accept other volunteers for shorter lengths of stay. This scheme, mainly open to RSPB members, has been relatively successful. The British Trust for Conservation Volunteers, as utilised at Holme on occasion, is also a source of ‘conservation holidays’. Again, these could be utilised to assist further with specific conservation initiatives elsewhere within the AONB.

Recommendation 6 – Maximise the Use of Volunteers

R6.1 To investigate the potential use of volunteers to ‘police’ visitor behaviour and act as a frontline intervention measure with in the Nature Reserves under greatest threat.

R6.2 To promote the potential for ‘volun-tourism’ within the AONB through the membership network of the environmental conservation/ management organisations, and the British Trust for Conservation Volunteers (BTCV).

Damage Prevention Measures

11.41 The necessity and use for damage prevention measures needs to be considered in conjunction with better understanding of the nature of the effects, and/or when a particular species is under considerable threat.

11.42 If closure of an area is considered the most appropriate form of action, then we would recommend the following controls:

- Include a buffer perimeter where possible, to ensure that any potential effects caused by unawareness is kept to a minimum;
- Provide information boards which details the rationale for the closure – most people accept that at certain points, and at certain times of year, the needs of conservation are greater than their need for access.

11.43 Ideally, this should also include policing and penalties for ignoring the closures.

Recommendation 7 – Damage Prevention

R7 To ensure that any closures or restricted access to certain sites are clearly defined and the rationale explained to visitors.

Key Issue: Engaging Tourism Business in Environmental Conservation

Tourism Business Role in Visitor Behaviour Message Dissemination

- 11.44 To ensure that the messages relating to appropriate behaviour are received by visitors, and are consistent throughout the AONB, there will be a need for the business sector to be fully engaged in this process.
- 11.45 Firstly, tourism businesses need to be involved in developing and devising appropriate messages. The advantage of this is that their relationship with visitors means that they are generally very astute at understanding how visitors will read and react to certain messages. Furthermore, their involvement will lock them into the process, and thus they should be more inclined to implement dissemination of these messages to visitors, be it at the information gathering, booking, or arrival stages.
- 11.46 Given the level of tourism businesses within the AONB, it would be beneficial to identify certain 'champions' of the environment to work with environmental management organisations to achieve the right balance of messages. Obvious suggestions include representatives from Holkham Hall, Pinewoods Holiday Park, Kelling Heath Holiday Park, Blakeney Hotel, accommodation associations and attraction associations, for example.

Recommendation 8: Tourism Business Role in Visitor Behaviour Message Dissemination

R8.1 To devise positive conservation messages to be included on any individual or joint promotional literature (including access to web-based visitor portals).

R8.2 To identify 'champions' of environmental conservation management to encourage businesses to impart agreed positive conservation messages.

Business Involvement in Environmental Management

- 11.47 There are potential financial and visitation gains for businesses that become involved with environmental management and/or conservation/management organisations.
- 11.48 The conservation and environmental management organisations within the Norfolk Coast AONB, with the exception of English Nature, are membership-based organisations. Therefore, these organisations have an easily identifiable visitor market. Through organisational publications, this market is already presented with messages of the value of the landscape that can stimulate an interest in visiting. These visits will need accommodation, places to eat and drink, and/or shop. Therefore, they all present a viable market opportunity for businesses within the area.

- 11.49 To gain a specific association with one, or all, of these management organisations should therefore be an attractive proposition to tourism businesses within the area. We are aware of certain associations that already exist, including RSPB/National Trusts association with Brancaster Commons Committee, and the National Trust and Blakeney Hotel for example. Likewise, the David Bellamy Conservation Awards have become a popular means with which holiday parks can integrate wildlife conservation aims within their business operations.
- 11.50 It may be possible to expand this further and to formalise associations as an 'active supporter of conservation' in the Norfolk Coast, with criteria introduced to encourage businesses to adopt certain practices for the benefit of the AONB/Management Organisations; and benefits identified for participation within the scheme offered to businesses.

Recommendation 9: Business Involvement in Environmental Management

R9 To investigate the potential benefits of instigating a joint conservation/business partnership scheme which denotes businesses that are 'active supporters of Norfolk Coast Conservation'.

Greening Tourism Businesses

- 11.51 All businesses are now being called upon to take a more environmentally responsible role in relation to the impacts they have on a global scale.
- 11.52 The advantage for tourism businesses is that the travel industry has been at the forefront of many initiatives being introduced to encourage 'green' practices. This is now reflected in the numerous schemes that are available to tourism businesses that allow them to demonstrate their 'environmental' concern through the overt promotion of business practices.
- 11.53 The adoption of these greening initiatives by tourism businesses is growing, albeit at a steady pace. This is reinforced by the fact that certain national regional tourist boards in the UK now officially promote the Green Tourism Business Initiative (Scotland, South East and South West), an initiative which mainly targets the serviced accommodation and attractions sectors; and the continuing growth of David Bellamy awarded caravan and camping sites for example.
- 11.54 The Norfolk Coast AONB should be at the forefront of driving change in business practices to 'greener' methods, especially given its special relationship with the environment coupled with its potential susceptibility to the effects of climate change. Therefore, it is recommended that businesses be encouraged wherever possible to include and innovate in 'green' practices in order for the Norfolk Coast AONB to be considered a sustainable destination in a holistic and global sense.

Recommendation 10: Greening Tourism Businesses

- R10.1 To promote the adoption of 'greening' practices amongst all businesses involved in tourism.
- R10.2 To look at the value of introducing further reward schemes that will assist tourism businesses in adopting 'green' practices.
- R10.3 To ensure that other services are available allowing for the easy adoption of 'green' practices within everyday tasks of running a tourism businesses (recycling collection; re-usable resources, etc).

Key Issue: Raising Awareness

Raising the Profile of Sightseeing Attractions

- 11.55 The audit of existing tourism attractions has identified that the sightseeing and cultural attractions within and around the Norfolk Coast AONB lack a degree of distinction and awareness.
- 11.56 It is our opinion that there are some distinct themes that run through the whole of the northern districts of Norfolk (King's Lynn & Great Yarmouth, North Norfolk, Great Yarmouth, The Broads). These include:
- Heritage railway – NNR Poppyline, Wells & Walsingham Railway, Barton House Railway (Broadland) and Bure Valley Railway (Broadland);
 - Stately Houses/Estates – Holkham Hall & Estate, Blickling Hall, Wolterton Hall & Park, Felbrigg Hall and Sandringham House, Houghton Hall, Norwich Castle (Norwich); and
 - Gardens & Parks - Holkham Estate, East Ruston Old Vicarage, Hoveton Hall Gardens, Mannington Gardens, Priory Maze & Gardens, Sheringham Park & Gardens.
- 11.57 Whilst some of these attractions are within the Norfolk Coast, many are outside the designation or at least away from the areas of highest sensitivity. In an attempt to alleviate some visitor pressure away from the Coast, and spread the benefits of tourism across the whole of the area, it is recommended that these attractions are strengthened and actively marketed to the relevant visitor markets.

Recommendation 11: Raising the Profile of Sightseeing Attractions

- R11 To encourage and contribute to the promotion of sightseeing and cultural attractions as a means of drawing visitors away from the sensitive coastal areas, and thus alleviate some of the pressure created.

Promotion of Cycling and Walking Routes

- 11.58 The audit of existing tourism amenities suggests that the provision for walking and cycling is good within the Norfolk Coast AONB. However, according to the visitor research this is not necessarily being recognised by the visitors themselves. In particular, it is felt that the area lacks association as a destination for walking and cycling amongst overnight visitors, particularly cycling, despite recognition that the landscape would be conducive to these activities.
- 11.59 Given the level of routes available and strides made in promoting and developing cycling and walking based products within the area, this is considered a significant finding. Ultimately, it appears that there could be greater potential to develop walking and cycling as a means of movement, but the perceived constraints as detailed by the visitors will need to be overcome. This includes:
- Awareness – There appears to be a low level of awareness of existing cycling and walking routes within the Norfolk Coast AONB. In the case of cycling, this low awareness is mixed with a perception that there are no off-road cycle routes, and that the roads are not suitable for cycle use because they are busy and narrow in places. As a result some visitors deliberately avoid bringing their bikes (an enthusiast), whilst others did not make the connection between the AONB and cycling opportunities ('never thought about it!', mixed with feelings that they felt the area was unsuitable for the activity).
 - Routes of different length – This was noted with specific reference to walking, but there appears to be a perceived lack of different length routes, with casual walkers/families wanting a short, circular route, and the convenience of places to stop and park, and places for eating and drinking. Overall, despite walking being an activity that most people undertook in some form or another, the overall package within the Norfolk Coast does not feel as developed as other destinations.
 - Interpretive routes, and routes that lead to somewhere interesting – Again, this is more a case of lack of awareness than provision, but there is a feeling that the Norfolk Coast lacks a degree of route interpretation either as information boards or through self-guided leaflets. Some visitors suggested hand-held audio tours.

Recommendation 12: Promotion of Cycling and Walking Routes

- R12.1** For the Norfolk Coast to become a destination that is synonymous with walking and cycling by raising awareness of the considerable walking and cycling routes available within the area.
- R12.2** To ensure that routes are provided off-road and along quiet lanes, and are of different lengths to appeal to a wide range of users.

R12.3 To ensure that interpretation is provided along the route through the development of sustainable itineraries, which should include appropriate places of interest and stops for refreshments.

Route Start & Finish Points

- 11.60 With reference to the decision making process people take when choosing whether to go on a walking and cycling route, a key issue raised was how participants return to their start point (car-park, accommodation, settlement). In this context, there appears to be a certain trade-off between the route start and finish points, the time taken on the route, and whether there is a means of returning via other means.
- 11.61 Walks and cycling are generally time sensitive activities, and though the time taken can differ considerably between enthusiast and casual user, it is more often than not the fixed variable. Taking an example whereby a visitor has the choice of two walks both of which take 2 hours to complete, but one is a circular walk (ending back at the start point) and the other is a linear walk (with a specific finish point). If we accept that in this scenario the visitor only wished to walk 2-hours, if there is no other means of returning to the start point other than via walking, it is likely that the circular route would be used (i.e. it fits into the timeframe). If, on the other hand, there was a guaranteed means of returning to the start via public transport, the intimation is that greater consideration would be given to using the linear walk.
- 11.62 We would recommend that this premise is investigated further. The significance is that if the link between transport and walking and cycling routes as a complete journey can be made, then the start points for the routes could be positioned away from the A149. An example of where this is already available is at Little Walsingham, whereby access to the Wells & Walsingham Light Railway presents an opportunity for visitors to park at Little Walsingham, walk to Wells (approx. 4 miles), and return via the railway.

Recommendation 13: Route Start & Finish Points

R13 To investigate the potential usage of cycle and walking routes that start outside of the Norfolk Coast AONB if linked to a means of sustainable transport that returned to the start point – there is the potential to trial this by including the Wells & Walsingham Railway within sustainable itineraries.

Key Issue: Traffic & Transport

- 11.63 The investigations have revealed that traffic is one of the main issues that need to be addressed, particularly in relation to relieving some of the visitor pressure on the community.
- 11.64 This presents one of the greatest challenges in achieving a truly sustainable tourism sector within the Norfolk Coast AONB. This is because there is a high reliance on the motorcar in everyday life, with any changes of visitor behaviour in this regard likely to require a significant change in attitude amongst the public as a whole in terms of car usage.
- 11.65 Nevertheless, evidence suggests that if packaged correctly, visitors would be willing to use alternative means of transport. The following highlights key suggestions for improving this package within the Norfolk Coast AONB.

Raising Awareness of the Public Transport

- 11.66 The Coastal Hopper is regarded as a key initiative in driving visitor use of public transport, and provides the foundation of a visitor-focused service within the AONB. However, there are opportunities to develop both this service, and other services to provide a more integrated and appealing alternative to the use of cars.
- 11.67 The evidence from the investigations, particularly the Visitor Focus groups, suggests that certain constraints to usage will need to be addressed, including:
- Awareness – the focus groups highlighted that awareness of the service is low, with only one mention across the two groups even though the benefits of a ‘hop-on, hop-off’ service were discussed as a potential product development opportunity. This suggests that there could be a certain amount of latent demand for this type of service;
 - Family focussed – families commented on the inconvenience of public transport in relation to their needs for convenient access, and the level of items they need to take with them on a trip out. However, they also highlight how much their children actually like going on public transport, and that this could be a key factor in their decision;
 - Packaging - a trip using public transport is much more appealing if it forms part of the trip itself, in other words bus travel should form an integral part of the trip rather than just a means of getting from A to B. Creating distinguishing marks to allow for differentiation between general transport routes could also assist in this regard;
 - Pricing – in conjunction with the recommendation for a ‘hop-on, hop-off service’, a one-price, multiple journey ticket was mentioned as desirable (again highlighting awareness issues) but

extending this further, it could be designed to cover consecutive days of travel, i.e. one-day, two-day, three-day travel cards;

- Joint promotion – an element of joint promotion already exists (North Norfolk Railway and Kelling Heath), however promotion initiatives combined with the Coast Hopper could also help to encourage use of bus travel to sightseeing attractions and features of interest, especially if combined with reduced price entrance fees, money off certain food and drinks, or money off cycle hire for example;
- Ticket availability – greater awareness could be achieved if the ‘Rover’ tickets were more widely available, and if they could be purchased in advance of travel (at present, purchase can only take place on the bus itself).

Recommendation 14: Raising Awareness of the Public Transport

R14 To promote awareness and use of the Coastal Hopper and other bus services through:

- Including journeys, times, etc. as part of a sustainable itinerary;
- Joint promotional activities – reduced entrance fees, money off food and drink, link to cycle hire;
- Identifying other sources of ticket purchase – accommodation provider, local shops;
- Packaging public transport in the context of the AONB as an attraction in its own right;
- Ensuring a family friendly focus; and
- Looking at the potential for multiple day passes.

Developing Public Transport Network

11.68 If the ambitions of the Norfolk Coast in encouraging greater interest in the use of public transport are to be realised, then it is anticipated that further investment within the services themselves may be required. For instance, if further growth occurs, it will be essential to ensure that:

- the frequency of service matches usage requirements at peak tourism times (currently the Coastal Hopper stands at 12 services per day);

- the volume of services provides sufficient capacity to carry envisaged increases in demand at peak usage periods (the Coastal Hopper suggests that current bus capacity is on the whole sufficient, but this could change if demand increases sharply);
- the routing is consistent across all services, with the service having a mix of departure and arrival destinations (some of the Coastal Hopper Services start and finish in Cromer, other start and finish in Sheringham, others in King's Lynn).
- the timing of services matches the requirements of the visitor market. For example, the last Coastal Hopper Service runs out of Cromer at 7pm. Anecdotally at least, this is considered quite early for a public transport service in that it means that visitors do not have an option of prolonging stays into the evening economy periods.

Recommendation 15: Developing Public Transport Network

R15 To ensure that promotion of public transport is matched by sufficient investment in service provision, designed around the needs of visitors.

Park & Ride System

- 11.69 A recommendation for further investigation is to identify the potential for a 'Park & Ride' system. This recommendation is derived from both the workshop consultations and the visitor focus groups.
- 11.70 It has been suggested that, through the Coastal Hopper, a Park & Ride system already operates within the AONB, with people having the option of parking their car at Hunstanton or Cromer and then travelling into the AONB by bus. Whilst this may be true, the service is not promoted in this manner and thus the likelihood of use in this way is considered to be limited. Moreover, Hunstanton and Cromer have their own traffic issues during the peak tourism periods. The emphasis will need to be on alleviating pressure across the whole of the Norfolk Coast in its widest sense.
- 11.71 Therefore, we feel that it would be more appropriate to investigate the establishment of a Park & Ride system which aims to alleviate pressure off all routes close to the Norfolk Coast AONB. We appreciate that it may not be possible to instigate a totally new service, but rather existing services could be developed further into a Park & Ride route.
- 11.72 Potential services could include:
- North West Fakenham – access to Wells provided by buses 29 & 30 and Burnham by buses 28 and 39.

- Walsingham – Buses 29 and 30 provide access Wells.
- Holt – buses 45, 46 and 46A travel to Cley, Blakeney, Morston and Langham.
- Aymerton – Bus route 16 & 18 travels to Cromer.

Recommendation 16: Park & Ride System

R16 To investigate the potential viability and usage of Park & Ride schemes to be sited in locations outside of, or on the outskirts of, the Norfolk Coast AONB.

Cycle Carriage Facilities

- 11.73 An additional comment regarding cycling concerned the potential of a cycle carriage facility attached to bus transport.
- 11.74 We are aware that this has been mooted in the past, but that at present the Norfolk County Council do not feel that this type of service is appropriate for the route (tight time constraints, and stopping points are not conducive to the loading and off-loading of bikes).
- 11.75 However, if the Norfolk Coast is to realise its potential for walking and cycling, a solution to this should continue to be investigated. This could include the carriage service being only applicable at suitable stops or times for example. As long as this is clearly expressed to cyclists, at least they would have this as an option.

Recommendation 17: Cycle Carriage Facilities

R17 To continue to explore the potential benefits of a cycle carriage facility on bus transport routes - the Norfolk Broads now operates 'In bus' cycle carriage.

Strategic approach to car parking

- 11.76 The above series of recommendations have all been based upon encouraging the use of more sustainable means of transport for moving around the AONB, and alleviating car-borne traffic pressure upon A149 that is a direct result of visitors.
- 11.77 However, if successful, without other measures to deter car use, the end result will not be a reduction in car traffic. Rather, the volume of traffic is likely to remain the same, with new supply likely to replace

any traffic that is diverted. This in turn could eventually have further detrimental consequences to the environment and community.

- 11.78 Therefore, it is essential to ensure that any diverted traffic results in a real benefit. This could be achieved through the closure of a certain level of car parking spaces within car parks that have the highest tourist visitor volume, or at the very least converting some spaces to be given local resident priority status.
- 11.79 Alternatively, the car parks could be encouraged to raise car-parking fees in order to make any alternative sites more attractive propositions for use. It is recognised that this may be challenging, as there are a variety of different types of owners of available car parks within the AONB.

Recommendation 18: Strategic approach to car parking

R18 To investigate the potential for a more strategic approach to car parking to be used in conjunction with measures to encourage sustainable transport use, and which also aims to benefit local residents.

Traffic Clearways

- 11.80 A clearway is effectively a temporary traffic management tool to ease road congestion through prohibiting car parking on sections of the road. The system only operates during certain times of the day, usually coinciding with when traffic is at its greatest. A benefit of the scheme is that it has minimal visual implications in that it does not require any permanent lines, although some permanent (or semi-permanent) signage is required.
- 11.81 Examples of where the introduction of rural clearways could be beneficial within the Norfolk Coast AONB include within Cley-next-the-Sea and Stiffkey, to work in conjunction with resident priority parking within car parks.
- 11.82 A common complaint of such systems is that it impacts on residents as much as it does visitors. However, if this could form a package of measures, with some aspects aimed at being preferential for residential parking, then this may be a more acceptable solution for relieving pressure on the local road network.

Recommendation 19: Traffic Clearways

R19 To investigate the suitability of instigating traffic clearways within certain pinch-points for traffic congestion, including Cley-next-the-Sea and Stiffkey.

Expanding the Quiet Lanes Initiative

- 11.83 Quiet Lanes is an initiative piloted in a triangle area bounded by Cromer, North Walsham and Mundesley, and therefore includes a section of the AONB.
- 11.84 Overall, the scheme is said to have been successful in achieving its original objectives, including an attractive alternative network of routes that link communities; the environmental protection and enhancement of minor country lanes; the use of partnerships to deliver community support, and to use low cost and low visual impact traffic engineering measures.
- 11.85 On the basis of this success, and trials being conducted elsewhere in Norfolk, it is recommended that further investigations should be conducted to determine the extent to which this scheme can be mirrored elsewhere within the Norfolk Coast AONB.

Recommendation 20: Expanding the Quiet Lanes Initiative

R20 To investigate the potential of further 'Quiet Lanes' to be established elsewhere within the Norfolk Coast AONB.

Key Issue: Maximising Economic Benefit

- 11.86 Tourism is already a valuable sector to the AONB and wider (North Norfolk, King's Lynn & West Norfolk, and Great Yarmouth) economies. However, overall spend per night (£34) within the area is considered to be at the lower end of the National average tourism spend (£59).
- 11.87 Two overriding measures are required to ensure that tourism continues to contribute its worth per head of visitor to the local economy. These are:
- Encouraging greater spend from the visitors during their stay; and
 - Ensuring that the maximum amount of spend is retained within the local economy
- 11.88 Many of the recommendations contained within this section, if developed appropriately, should be able to enhance the spend levels of visitors, including understanding their views of value for money (some visitors claim that the Norfolk Coast is 'not a cheap place to visit') and their spend behaviours through research; raising the profile of visitor attractions; and integrating commercial enterprise into sustainable itineraries as strategic start, stop-off, finish points.
- 11.89 The following recommendations are aimed at ensuring that more of the spend is retained within the local economy, and supports other business sectors

Delivering Quality & Driving Local Distinctiveness

- 11.90 The vision for the area should be on providing a quality experience for all. The focus of this does not just reflect the need to attract a more 'up-market' visitor, but ensuring that all visitors are encouraged to experience the best that the Norfolk Coast has to offer.
- 11.91 This includes:
- the delivery of a quality and customer orientated accommodation offer, with good service through hospitality training at its heart;
 - encouraging a family friendly product, with the children themselves often at the heart of discretionary spend decision making. A high satisfaction experience within this market can often lead to repeat visits;
 - driving the use of local produce in all aspects of the tourism offer wherever possible, but particularly in relation to food (organics, special breeds, seasonal) and beverage (micro-breweries);
 - maximising the market potential of specialist shopping at Holt and Wells, and creating linkages with other spend categories including sightseeing attractions, eating and drinking out; and
 - developing user friendly itineraries which include sightseeing attractions, linked to public transport, places to eat and drink, shopping facilities, and evening entertainment.
- 11.92 A key aspect that needs to run through the heart of this is the promotion of local distinctiveness, particularly through the availability of 'local' produce but also in its presentation to add to its authenticity.
- 11.93 The benefit from a visitor perspective is that it helps define 'local' distinctiveness for which many are prepared to pay extra for. For businesses, it helps continued viability and likelihood of repeat/recommended visits. For the economy, it ensures that more of the tourism revenue is retained within the local economy, strengthening the local supply chain, boosting its multiplier value, and helping to demonstrate the worth of tourism to locals. An advantage for the Norfolk Coast is that the visitor focus groups already suggest that the area has certain 'local' produce connotations, particularly microbreweries and seafood. It will be important that the integrity of these items are retained (i.e. they don't become too 'touristy').

Recommendation 21: Driving local distinctiveness

R21 To ensure that tourism businesses, wherever possible, source products from local/Norfolk producers. This is to be matched through appropriate promotion to visitors to ensure/raise awareness.

Researching Current Supply Chain Linkages

- 11.94 A key issue highlighted through the consultation process is the need to understand better how tourism spend currently benefits all businesses within the Norfolk Coast AONB.
- 11.95 As such, we would recommend investigating the local supply chain and how tourism spend spreads from business to business. This will help to highlight the current supply linkages, but also assist with identifying where there is potential for these linkages to be enhanced.
- 11.96 Scott Wilson would advocate the use of a systematic approach using professional services to define how the supply chain works within the Norfolk Coast, and how these linkages could be strengthened. Nevertheless, we appreciate that this can be a costly exercise. An alternative that is being used by other communities in the UK is a system designed by the New Economics Foundation, as defined in their handbooks 'Plugging the Leak' and 'The Money Trail'; and 'Local Multiplier 3' (LM3).
- 11.97 According to NEF's website, Plugging the Leaks is a community-led economic development strategy tool, with the main emphasis being to enable a community to identify the economic resources in their local economy and determine ways to use them more effectively. LM3 is an impact measurement tool that enables organisational leaders – from social enterprises to businesses to local authorities – to measure how income to their organisation or initiative is spent and re-spent in the local economy, especially when that local economy is in need of regeneration. The purpose of tracking and measuring this spending is to identify opportunities to strengthen linkages in the local economy so that efforts can be made to keep money circulating locally. The onus of both elements is on the community to take the initiative, empowering them to conduct the measures themselves. However, this approach will need a high level of commitment and energy to ensure the measures are accurate and robust.

Recommendation 22: Researching Current Supply Chain Linkages

R22 To conduct further research to identify the accrued benefits of tourism throughout the economy, and to identify where the local supply chain could be strengthened.

Key Issue: Community Involvement & Benefits

Involve Community in Tourism Policy & Decision Making

- 11.98 A criticism of tourism studies, strategies, and policies is that communities do not feel sufficiently represented in terms of their views. It is hoped that this has been rectified to a certain degree through this study by sharing their views and identifying their key concerns.

- 11.99 The views of residents form a valuable component if destinations are to be deemed truly sustainable. If the majority of community views are considered negative, then it can be construed that tourism will have failed in its sustainable objectives.
- 11.100 A fundamental issue to challenge within this process is the level to which community benefits from tourism spend – tourism businesses suggest they benefit a lot; some community representatives suggest a little. The truth is probably somewhere in the middle.
- 11.101 This study suggests that there is a degree of a ‘them and us’ attitude, which appears to be a consequence of a lack of a partnership approach and format for discussing areas of common concern, albeit that the views may be polarised. As a result, there is a certain degree of scepticism from some factions of the community in relation to the motivations of the tourism sector, and this is no doubt born of the lack of understanding and involvement.
- 11.102 Thus, there is a need to ensure that all voices are sought and accounted for within the decision making process of tourism and the development of tourism activity. Examples of this type of Partnership approach can be seen to be working effectively within certain sections of the AONB (The National Trust & Blakeney Parish Council; Brancaster Commons Committee). However, this needs to be replicated elsewhere within the AONB to establish what are the acceptable levels of change in relation to the development of settlements and green-scapes in relation to tourism.

Recommendation 23: Involve Community in Tourism Policy & Decision Making

R23 To follow examples already provided within the Norfolk Coast AONB that encourage the involvement of community representatives in key decisions relating to tourism. This should include joint committees and position statements regarding acceptable levels of local change to accommodate the tourism sector.

Resident Card

- 11.103 An apparent negative effect of tourism within the Norfolk Coast AONB is that the price for local facilities, services and produce are said to inflate during the tourism season.
- 11.104 It is difficult to test the validity of this claim, with proprietors likely to point to a range of factors that reflect price rises during peak tourism season, including additional wage bills and other associated running costs due to increased visitation.
- 11.105 Nevertheless, this acts as a form of inequity from the perspective of local residents as a direct result of tourism.

- 11.106 Initiatives introduced elsewhere to alleviate this inequality includes the development of a Residential Card/Pass. As noted for Canterbury, this pass includes discounts on a range of leisure facilities, shops, restaurants, and entertainment facilities.
- 11.107 It is felt that this type of scheme would help address some of the key objections voiced by the community, in that it would ensure that local residents paid less than visitors for use of their services, and that tourism spend could actually be seen to benefit the wider community. It is possible that visitors would also accept this as a reasonable solution, rather than a specific tourism tax or another initiative that would see prices increase for tourists.
- 11.108 Investigation would be needed to test the suitability of such a scheme within the AONB, though further benefits could be accrued if a preferential car-parking scheme and/or transport pricing were also attached to the scheme. The cost and management implications of such a scheme would also need to be reviewed to test viability.

Recommendation 24: Resident Card

R24 To investigate the suitability and perceptions of a resident card scheme within the Norfolk Coast AONB, linked to preferential parking and sustainable transport initiatives..

Further research into second home ownership

- 11.109 A central complaint of the community in relation to visitors is the impact of second home ownership. Unfortunately the scope of this study has not allowed for a more detailed investigation into the nature and characteristics of this professed 'visitor' market.
- 11.110 Evidence suggests that whilst tourism has a role to play in encouraging second home ownership, that this forms only part of a much greater decision making process. In addition, there is some debate as to the positive forms of impact that second home ownership can have (economic benefits derived from holiday lets; use of empty buildings); the negative effects that it can have (removing houses from the market; inflating house prices beyond local means); and how second home owners should be classified.
- 11.111 The issues surrounding second home ownership, therefore, are considered to be worthy of a much more detailed investigation. This should include analysis of:
- Reasons for purchasing;
 - Usage levels, behaviours, spend patterns; and

- Criteria which will help assess whether their behaviour and attitudes more closely resemble those of visitors, residents, or neither.

Recommendation 25: Further research into second home ownership

R25 To research fully the characteristics of second home ownership and its implications for the local community.

12 Vision for Tourism in the Norfolk Coast AONB

- 12.1 The overriding vision for tourism within the Norfolk Coast AONB should be along the following lines:

To develop a tourism product that is synonymous with a high quality product, and which has preservation and conservation of its coastal and countryside landscapes at the very heart of its experience.

The emphasis is on the organic growth of existing markets, and the development through partnerships . of niche markets specifically identified as presenting the greatest gain but with the least impacts (i.e. culture and sightseeing, walking and cycling, wildlife learning, food and drink, shopping, all with a distinct Norfolk Coast dynamism).

Messages that seek to encourage visitors to maximise their enjoyment, experiences, and memories whilst reducing their effects (e.g. 'take nothing but photographs – leave nothing but footprints (EMS)), enveloping both local and global environmental issues, and community interaction, will be a consistently imparted to visitors, with the Norfolk Coast AONB at the forefront of the drive to change visitor behaviour in protected areas. This will be matched through the delivery of initiatives and mechanisms whereby experiences can be maximised, whilst adopting appropriate behaviours that are considered sympathetic and sustainable.

Visitor Management Plan

- 12.2 One of our key recommendations relates to the Visitor Zoning Map. We understand that this has been a useful tool for stakeholders in order to interpret the main management techniques for certain sites.
- 12.3 However, if the same type of Visitor Zoning Map is to be replicated in the future, we believe that there is a fundamental layer that needs to be added relating to visitor motivations and behaviours. As previously mentioned, the role of the nature and wildlife in the overall appeal of the AONB should not be underplayed. With the exception of Sandringham House and perhaps Holkham Hall and the North Norfolk Railway, the area as a whole has few other attractions that could be considered of national repute. As such, the contribution of the Nature Reserves in relation to attracting tourists is vital to the continuing success of the AONB's tourism economy.
- 12.4 We feel that a descriptive layer highlighting the role of the coastal zone and Nature Reserves will allow for a more balanced consideration of how and why some of the more sensitive zones (highlighted in Red and Orange) are so popular with visitors. Whilst this may be considered implicit in the nature of the 'Visitor' focus of the Plan and the text which accompanies the zoning Map, an explicit depiction on the Map itself, which is arguably the element most people refer to, would allow for a greater

understanding of key issues to be faced along this section of the AONB, and by a wider array of stakeholders.

- 12.5 In particular we would recommend highlighting Volume of Visits; Types of Behaviour; Accessibility; and Level of Impacts for each of the key zones identified.

Recommendation 26: To Revise the Visitor Management Plan and Zoning Map

R26 To include a further layer within the Norfolk Coast AONB Visitor Management Plan Zoning Map which defines visitors, their characteristics, and their behaviour to explicitly denote the potential impacts of those behaviours.

Integrated Sustainable Visitor Network

- 12.6 The overall vision surrounds the need for tourists to behave in a way that is more conducive to the protection and conservation of the natural qualities and characteristics of the AONB environment.
- 12.7 Many of the recommendations, if combined strategically, point to the development of an Integrated Sustainable Visitor Network (ISVN). Map 12.1 provides a visual representation of how this network may appear at ground level.

Tourism Day Visitors

- 12.8 The following provides a summary of the key aspects of the ISVN vision in relation to Tourism Day Visitors.
- The provision of four or five car park sites, located outside or on the outskirts of the Norfolk Coast AONB, established for the specific purpose of encouraging car journeys to end outside the AONB, and to act as a gateway into the Norfolk Coast AONB using sustainable transport.
 - These parking points have been chosen because they represent the most suitable locations to initiate a:
 - Park & Ride – utilising existing bus transport routes that provide access to the Norfolk Coast area to encourage access via public transport;
 - Park & Pedal – utilising the proximity of cycle routes of national or regional recognition to encourage access via cycling. Return trips are available via the bus routes which have cycle carriage provision, with cycle hire facilities also available; and/or

- Park & Walk – utilising existing major walking routes within the area to provide appropriate linear and circular routes around the Norfolk Coast, with potential for a return to the start point by public transport.
- Additional walking and cycling link routes will formulate a coherent grid-style network between the parallel Norfolk Coast Path, and National Cycle Network route, both of which have been developed into multi-user routes.
- These routes are to feed into the Visitor Centres within the Norfolk Coast (including a new Centre for entrance to the Holkham Reserve). At these Centres, visitors will be encouraged to discover the conservation value of the Norfolk Coast, informed of the positive contributions they can make, and the means of contributing through specific behaviours and actions.
- Whilst at the Visitor Centre, the visitor will be made aware of a scheme whereby businesses are actively encouraged to contribute to the conservation/management of the AONB. These businesses, which source produce from local growers/manufacturers wherever possible and have a 'local' distinctiveness, support conservation/management organisations through the promotion and backing of specific conservation projects. These businesses are distinguished through the specific mark that denotes they 'actively support conservation within the Norfolk Coast AONB'.
- The conservation projects themselves are implemented through the use of volunteer support, with volunteering actively encouraged throughout the Norfolk Coast in order to involve as wide an audience of people as possible in the approaches adopted in conservation practice.

Overnight Tourist

12.9 The ISVN for overnight visitors will be targeted towards their specific behaviours and needs. It is likely that they will continue to arrive by car, and that car-parking provision will be provided at the accommodation site. However:

- Through messages and appropriate packaging in relation to minimising their footprint at point of contact, the visitor party will be encouraged to pre-purchase a public transport multi-day pass.
- The public transport service will provide easy access to all of the attractions and coastal areas, with the frequency of routes matching their needs, and timings allowing the visitor to enjoy a relaxed evening meal and drink. At the end of the evening, the visitor will be able to alight at a convenient stop close to their accommodation.
- Through the transport Pass, the visitor will be able to enjoy certain exclusive discounts including a reduction in entrance fees to attractions, a free beverage with a meal in one of the local restaurants pubs, and/or money off a purchase made at one of the local retail establishments.

- The meals and beverages available in restaurants and pubs will have a 'Norfolk Coast' distinctiveness, with local produce being sourced wherever possible.
 - Through the benefit of having participated in an informative out-reach talk on the value of the local wildlife on arrival, the visitor is aware of the particular sensitivities of the natural wildlife and how they can adopt appropriate behaviours during their stay that will ensure that they leave a minimal footprint. These messages are reinforced through a visit to the Visitor Centre.
 - Whilst at the Visitor Centre, the visitor will be made aware of a scheme whereby businesses are actively encouraged to contribute to the conservation and management of the AONB. These businesses, which actively seek wherever possible to source produce from local growers and manufacturers, support conservation and management organisations through the promotion and backing of specific conservation projects. These businesses are distinguished through the specific mark that denotes they 'actively support conservation within the Norfolk Coast AONB'.
 - These conservation projects are implemented through the use of volunteer support, with volunteering actively encouraged throughout the Norfolk Coast in order to involve as wide an audience of people as possible in the approaches adopted in conservation practice. During their trip, visitors will be encouraged to return to the AONB with the explicit purpose of taking part of a 'volun-tourism' in association with the British Trust for Conservation Volunteering, RSPB, or National Trust for example.
- 12.10 It is realised that the above is purely a vision, and that this level of integration would be difficult to achieve. However, it has been presented to demonstrate the ambition needed for achieving a sustainable tourism product. This includes the creation of an offer whereby the visitor is encouraged to undertake more appropriate behaviours that will have less of an impact on the local community or natural environment before they arrive at the destination, and then ensure that these messages are consistently replayed to the visitor during their stay.
- 12.11 To become a reality, this vision will need an appropriate level of investment in facilities and services that will support this behaviour; and a high degree of partnership to ensure that the benefits of this approach is maximised through visitor spend.
- 12.12 The Norfolk Coast Partnership is in a prime position to encourage and co-ordinate elements of this vision.

EUROPARC Charter & the Norfolk Coast AONB

12.13 It is recognised that the Norfolk Coast Partnership are to consider applying to become a EUROPARC Charter Park at some stage in the future. With this in mind, it is worth completing a quick synopsis of the current status of the Norfolk Coast AONB is meeting some of the core requirements for attainment:

- The NCP recognise through its previous Visitor Management Plan the need to encourage tourism that supports the maintenance of its valuable landscapes, and its other special characteristics. In addition, measures have been established to try and mitigate some of the more damaging aspects of visitor pressure. Nevertheless, pressure on visitors is still regarded to be detrimental at certain sites.
- A monitoring system has also been established, but is not consistent across all of the key areas of sensitivity.
- The promotion and encouragement of tourism businesses to use more environmentally conscious and green practices is evident through national schemes, though only in a small number of establishments.
- Visitors are encouraged to contribute to conservation to a certain degree. However, the limited awareness of some of the more sensitive characteristics of the local wildlife for example suggests that these messages are only being received by those with a special interest in these aspects (RSPB, National Trust, & NWT members).
- Research into visitors types, characteristics and behaviours is very limited for the Norfolk Coast AONB, as it is for much of the northern areas of Norfolk. Research is planned to be conducted along the Norfolk Coast Path, which should provide some useful information. However, this is likely to provide information on a sub-section of the total visitor market to the Norfolk Coast AONB itself.
- Some facilities are available or are being up-graded to improve access, particularly to allow for disabled access (boardwalks have been placed at Titchwall and Cley), and to encourage educational groups (the National Trust operate a residential facility; the new Visitor Centre at Cley is to have a special educational facility).
- The promotion and awareness of the AONB and its specific sensitivities is fairly low. The NCP have operated a policy of no promotion, though promotion and information is being obtained by visitors through other means. Not all of this information is effective in communicating sustainable/sympathetic tourism messages to visitors.

- The consultation process demonstrated that there is some differing of opinions of the key stakeholders in tourism, with certain polarised views being expressed particularly regarding the severity of the negative impacts of visitors on sensitive environments; and between the community and business on the benefits of tourism spend on the welfare of the community. Nevertheless, there were certain areas of shared views, particularly in relation to the positive engagement of business in providing solutions to certain issues; and involving all opinions with regards to the relationship between the tourism and the community. This would help to overcome certain divisions of opinion, reduce conflict and prescribe a partnership approach to tourism management.
 - The process of this study has demonstrated the value of tourism to the Norfolk Coast AONB. However, it has also demonstrated the need to encourage greater retention of this benefit within the local economy. The promotion of local and distinctive products therefore needs to be an area for due consideration.
 - The study has revealed that whilst there is a visitor orientated public transport system aimed at visitors, awareness is considered to be low.
 - Whilst the NCP have a Visitor Management Plan, it is not considered to be up-to-date. We understand that the NCP are aiming to review the previous plan, and to adapt the recommendations identified through this study.
- 12.14 Having reviewed the requirements for obtaining a EUROPARC Charter against the current position of the Norfolk Coast AONB, it is our opinion that the NCP is progressing towards meeting the necessary criteria to be able to apply for the charter. This study has formed an integral part of the process.
- 12.15 This report has identified a number of relevant issues, with the recommendations formulated to ensure that they are sufficient addressed. Ideally, these recommendations need to be placed within the context of a fully formulated sustainable tourism strategy and visitor management plan. Once completed, this strategy will help to demonstrate to the EUROPARC organisation that the NCP is taking the necessary steps to develop and deliver a tourism sector in a manner that is inclusive of all stakeholders; and which is sympathetic to the continued conservation of the unique landscape and environment of this Area of Outstanding Natural Beauty.