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EXPERIENCE
European Regional Development Fund

 **Norfolk** County Council

EXPERIENCE: Experiential tourism to extend the visitor season

**Economic, environmental and social
impact evaluation for sustainability
and performance**

**Norfolk Regional Evaluation
March 2023**



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Economic Performance Executive Summary

The EXPERIENCE project steered a paradigm shift by extending the traditional peak tourism season into October – March, stimulating new economic growth in the France Channel England region. NCC activities put local businesses at the heart of strategies designed to boost off-season visitor numbers. New tourism revenue was created from additional visitor spend, providing long-term economic stability through year-round job creation, and was achieved through a wide range of focussed, complementary project strategies.

NCC engaged hundreds of local traditional and atypical actors and provided them with tailored training and support to develop tourism products aimed at the growing experiential and sustainable travel markets. Uniting actors into networks inspired the creation of over 100 off-season, experiential themed itineraries, formed from over 350 regional activities. Autumn and winter events supported by EXPERIENCE attracted over 174k visits, generating an estimated £12.1 million (€14.1 million) in local spend. Key tourism infrastructure was thoughtfully adapted to create off-season access to iconic tourism landmarks as well as improved access to tourism opportunities for people with accessibility needs. Innovative marketing campaigns introduced new, diverse audiences to tourism in Norfolk. Repeat visitors notably frequented Norfolk more in the off-season, with visitors stating they were more likely to recommend winter tourism than summer.

As it was for most of the country, the Norfolk tourism industry was badly impacted by the COVID-19 pandemic travel restrictions, losing around half the number of visitors and the associated revenue. NCC tracked responses from businesses supported by EXPERIENCE and those in the vicinity of project activities. They reported double, and in some cases quadruple, the visitors from autumn 2021 to autumn 2022. Across Norfolk, overnight visitor spending increased by 10% from 2020 to 2022 and by 2021, the region regained two thirds of its pre-pandemic visitor numbers, moreover with increased visitor spending. EXPERIENCE has contributed to faster economic recovery in Norfolk, compared with similar areas not running the pilot project, and defines a novel, sustainable framework for growth from the tourism sector.

Environmental Performance Executive Summary

To secure sustainable economic growth from seasonal tourism, it is vital that the natural assets underpinning experiential tourism are protected. In addition to the fiscal metrics that are to be measured and monitored to evaluate economic performance, so too must those for tracking the impact of tourism on the environment. Networks formed by NCC connected businesses and organisations with a shared goal of developing their off-season experiential offer. Through discovery of each other's unique potential, complementary resources were pooled to create new tourism products, supporting EXPERIENCE sustainability principles to keep carbon impacts to a minimum by sourcing local supplies.

Transport is often the largest contributor to carbon footprint of tourism. EXPERIENCE sought to attract proportionately more domestic visitors that did not have far to travel to Norfolk. On average, visitors travelled fewer than 25 miles to reach EXPERIENCE-supported events, generating half the carbon footprint than regular visitors to Norfolk. Overnight visitors typically stayed for a week, and while they may have used transport with higher carbon footprints to reach Norfolk, many adopted greener forms of travel upon arrival, demonstrating demand for sustainable transport.

Residents agree that Norfolk is a beautiful place to live but their main concerns around tourism relate to the environmental impact, specifically how the volume of visitors may increase litter, pollution, and road traffic. Interestingly, they believe winter tourism is less harmful to natural places than summer tourism. EXPERIENCE supported NCC upgrade and adaptation of infrastructure that improved functionality and visitor access to nature. These measures resonated highly with residents who overwhelmingly agreed that sustainable transport infrastructure should be encouraged in their area, recognising that such investment would encourage their own participation in sustainable physical activities such as walking, running, and cycling. NCC installed apparatus and planting to promote habitat creation, supporting wider environmental plans across the county to increase biodiversity net gain.

Social Performance Executive Summary

Achieving economic growth from seasonal tourism should not compromise quality of life for locals. Despite the impact of COVID-19 on tourism, which has been steadily recovering, the EXPERIENCE approach has been successful in attracting visitors through development and marketing new off-season offer that harnesses the potential of the region's natural assets. NCC regularly tracked residents' perceptions on the impacts from seasonal tourism on their area and how they, and visitors, viewed EXPERIENCE-supported activities and infrastructure projects, receiving over 6,700 responses.

Most residents consistently say that they like living in Norfolk and feel safe, however over the last three years there has been a gradual decline in their sense of calm and feeling relaxed, which was once very high. Residents reported that their household finances remained largely unchanged during and just after the pandemic, however they have worsened between summer 2022 and winter 2023, alongside increases in the cost of living currently affecting most of the nation. Tourist volume is a concern for residents with respect to housing. There is growing apprehension that visitors who very much enjoy Norfolk's attractions go on to purchase second homes in the region, consequently reducing house availability and affordability for locals. Residents became much more welcoming of tourists but did not necessarily feel that tourists made them feel more connected to their area. Taken together, there is very strong support for winter tourism from residents and visitors alike as is the perception that tourism improves the local economy and employment opportunities.

EXPERIENCE supported off-season event attendance was strongly motivated by people wanting to spend time with friends and family and, in some cases, visitors met new people. Visitor satisfaction with the quality of events was exceptionally high. On average, 30% of Norfolk residents require special provisions for access to tourist destinations, such as wheelchairs, mobility aids, additional hearing/visual interpretation and easy to understand signage. Most accessibility requirements were met, and visitors were able to suggest further considerations improve their experience at future events. Overall, the project activities contributed to visitor wellbeing by improving access to tourism opportunities, connections to other people and with the environment.

Introduction and Report Overview

The Norfolk Regional Evaluation presents findings to assess the economic, environmental, and social impact on performance and sustainability of the Interreg EXPERIENCE project. EXPERIENCE is a €24.5m project co-funded by the Interreg France (Channel) England Programme, which committed €17m from the European Regional Development Fund. It is led by Norfolk County Council (NCC) and runs from September 2019 to June 2023. EXPERIENCE is a major project to boost visitor numbers in the off-peak season through an innovative tourism strategy. New autumn and winter experiences will attract 11,309,368 new visitors to the six project pilot areas across England and France: Norfolk, Kent, Cornwall, Pas-de-Calais, Compiègne and Brittany (Baie de Morlaix and Côtes d'Armor).

EXPERIENCE has worked with local organisations and businesses to create unique experiences and adapt infrastructure to attract visitors between October and March, extending the tourist season and bring money into local economies year-round. The project promotes new experiences as individual activities and as part of themed itineraries in a high-profile campaign using cutting-edge marketing techniques.

Traditionally, the marketing approach for tourism across much of England and France has been centred on promoting mass-market locations during peak season, known as 'destination tourism'. But trends show that travellers are increasingly seeking experiences in which they feel a sense of adventure and discovery by immersing themselves in new cultures and exploring local foods, activities, and arts - known as 'experiential tourism'. This new demand has been the inspiration for EXPERIENCE to create a new tourism strategy to shift to the 'experiential' tourism approach.

Driving up the number of visits and overnight stays in the off-season will boost local economies by increased spending on experiences, accommodation, and eateries, and through the creation of year-round (rather than seasonal) jobs. The EXPERIENCE approach is based on the principle of sustainable tourism. As well as generating economic prosperity, it is important that there are benefits for the environment and local communities to mitigate any impact of increased visitor numbers.

The Norfolk Regional Evaluation report serves as one of six EXPERIENCE regional reports, assessing the economic, environmental, and social impact of the project that will inform the development of the EXPERIENCE Best Practice Guide. This legacy document will allow others to learn from the successes and mistakes in our approach to implement best practice in their own organisations, regions, or countries. The **NCC Theory of Change** summaries how resources were used to innovate and market diverse, sustainable, and accessible off-season tourism products. The report is structured into five chapters based on the core project work package deliverables:

- T1.** Delivering actor engagement & training to meet demand
- T2.** Delivering experiential tourism offer using unique natural & cultural assets
- T3.** Delivering off-season tourism infrastructure
- T4.** Delivering experiential tourism marketing & distribution
- T5.** Evaluating & improving sustainability within new off-season tourism offer

Each chapter begins with a summary of the work package activities (boxed in orange). The activity outputs are then described in further detail and, where possible, supported with data collected for economic, environmental, and/or social impact indicators (**SEE: Methodology**), featured in this report as full-page figures boxed in grey. Outcomes related to best practice and lessons learnt are indicated, where possible, and inform on the operational details that have proved to be a help or a hinderance (boxed in green). Another way in which EXPERIENCE is assessing project impact is through case studies (boxed in blue). This first-hand testimony highlights the direct impact of EXPERIENCE from the perspective of individuals, businesses and organisations who have either received support from the project, or have been involved in the project delivery operations, or who are well-positioned to comment on the legacy of the project.

Methodology

Traditionally tourism success is measured by an increase in the expected number of visits and the number of innovative products/services. The World Travel & Tourism Council states a need to embrace better monitoring systems to take sustainability as seriously as financial reporting. An increase in visitors can cause congestion, erosion, and pollution. Environments can be degraded, and wildlife lost. Residents can be displaced for holiday rentals or excluded from new leisure activities. Taken together, this causes long-term loss of regional appeal. Visitor numbers do not indicate sustainability and/or the lasting impact of activities on season extension, therefore cannot be used alone to determine value for money. True sustainability must benefit the economy, the environment, and society.

During the EXPERIENCE project lifetime NCC employed a variety of methods to collect relevant data that will monitor project activity key performance indicators (KPIs) to assess the sustainability of new tourism in Norfolk. This evidence-based approach can inform adjustments to activities that will deliver maximum sustainability and provide guidance for any region wishing to adopt the new tourism strategy developed by EXPERIENCE.

KPIs for economic performance include:

- Volume of new and repeat visitors
- Day and overnight visitors
- Purpose of visit
- Visitor spending, both direct and indirect, on attractions, shopping food/drink, accommodation and/or transport.
- Translating added visitor value into Full-Time Equivalent (FTE) employment (where 1 FTE is valued at €63,378, according to the Cambridge Model job cost)
- Visitor mode of transport
- Visitor travel distance (international/national/local)
- Visitor re-visit intention



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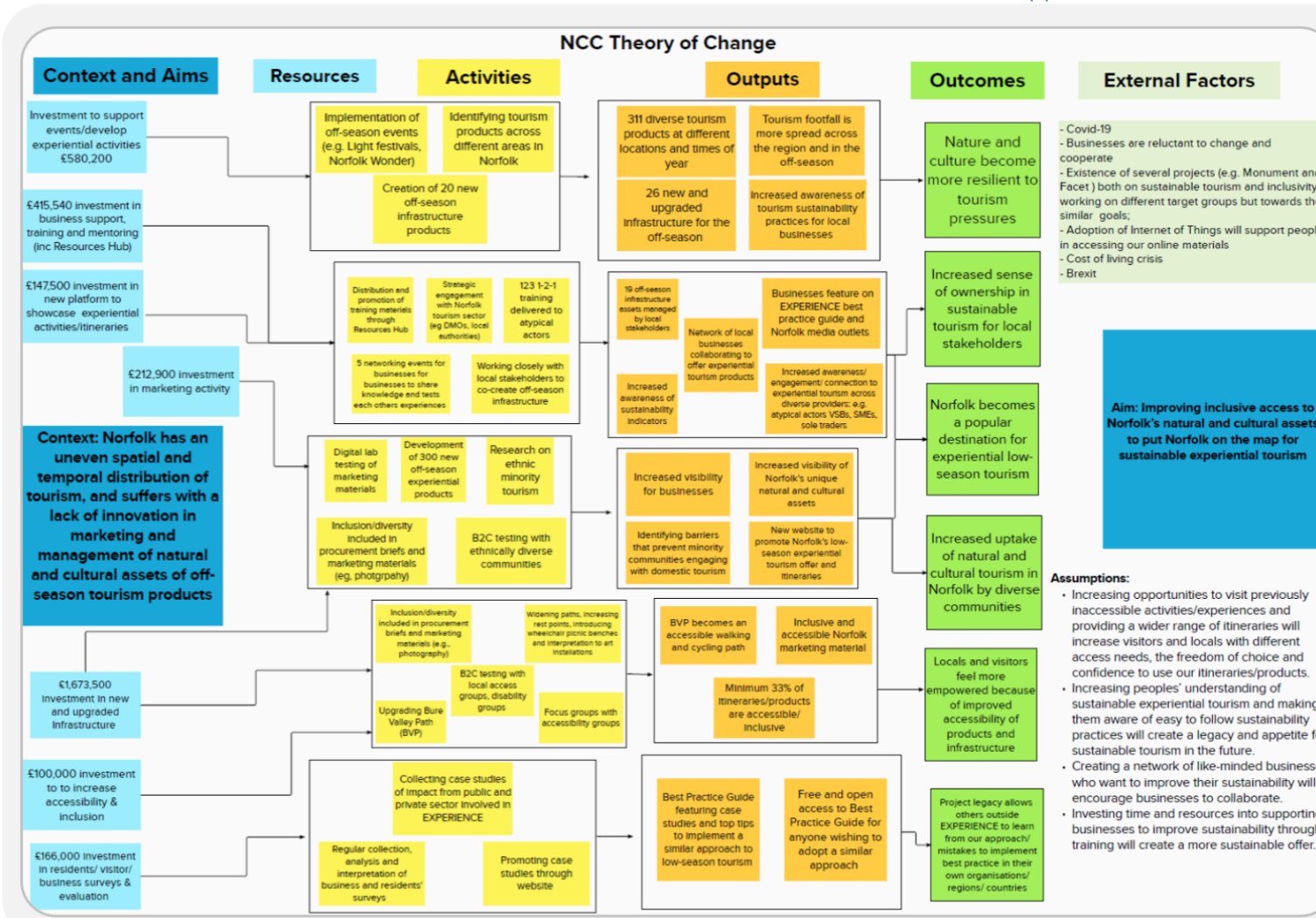
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EXPERIENCE: NCC THEORY OF CHANGE

EXPERIENCE aims to extend the tourism season (October to March), attracting 11,309,368 new visitors to the FCE region, by the end of the project in 2023. Norfolk will contribute to this target by improving inclusive access to regional natural and cultural assets through strategic innovation, infrastructure and marketing of off-season tourism products. The Theory of Change outlines how Norfolk County Council utilised resources, working with local actors and stakeholders, to deliver diverse, sustainable and accessible experiential tourism solutions to entice out-of-town visitors and appeal to local residents alike.



KPIs for environmental performance include:

- Differences in carbon impact of visitors attracted before EXPERIENCE activities and during the project lifetime
- Variation between visitor modes of transport
- Variation in visitor length of stay
- Any other environmental impact assessment being conducted specific to each region

KPIs for social performance include:

- How connected residents feel to the local area
- Variation in acceptance of tourists in the winter vs summer
- Variation in acceptance of tourists because of attending EXPERIENCE-supported events and infrastructure use
- Satisfaction with tourism offer in the winter vs summer

Data collection methods for economic, environmental, and social KPI monitoring include:

- Regional Economic Impact of Tourism reports for Norfolk and nearby non-EXPERIENCE areas (available through Visit East of England (www.visiteastofengland.com)).
- People counters positioned at EXPERIENCE-supported infrastructure, measuring autumn and winter visitors.
- Online surveys completed in the autumn and winter by businesses, small-medium enterprises, very small businesses, artisans, tourism operators and local authorities supported by EXPERIENCE.
- Online surveys completed in the winter by businesses situated near EXPERIENCE-supported infrastructure.
- Online surveys completed by Norfolk visitors to autumn and winter events supported by EXPERIENCE. Events organisations, who were internally collecting visitor feedback, worked with EXPERIENCE to include questions related to project delivery outputs.
- Online surveys completed by Norfolk residents every six months during the project lifetime, in the winter and summer.
- Procurement of data consultant with expertise in tourism industry.

Business impact surveys were circulated by email to the database of stakeholders engaging with the project. The six waves of Residents Surveys were circulated by email to EXPERIENCE newsletter subscribers, NCC mailing lists and advertised on Facebook. EXPERIENCE had a target of gathering 5,000 survey respondents related to the economic, environmental, and social impact of tourism and gather 6,765 responses during the project lifetime.

EXPERIENCE commissioned the use of a carbon footprint calculation tool (SASTDES Destination Carbon Footprint Tool), developed by the Centre for Sustainability, Tourism and Transport at Breda University, The Netherlands. Tourism market, transport, accommodation, and activities information gathered from the methods outlined above, were used to produce carbon footprint estimates of visitors to Norfolk.



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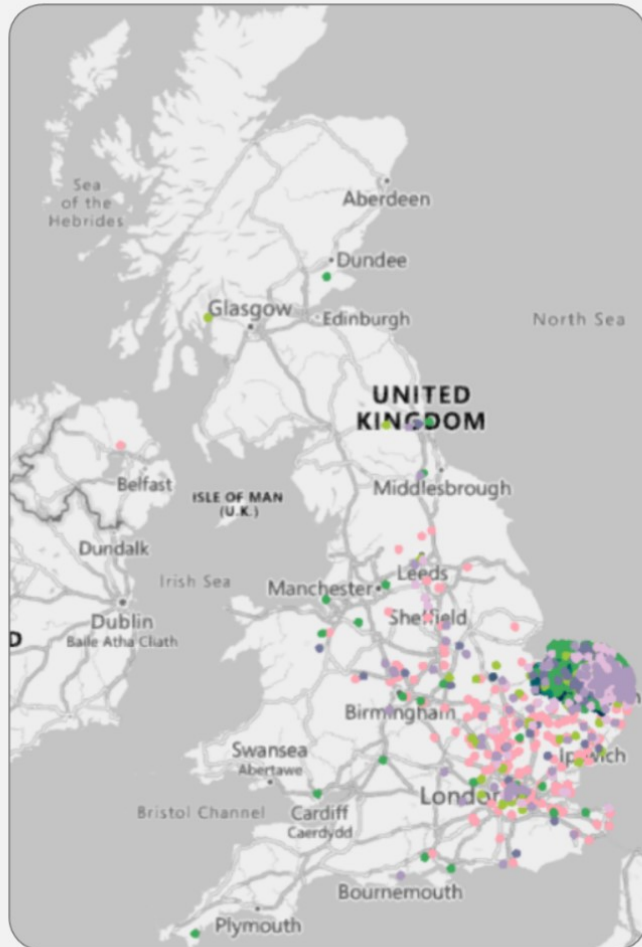
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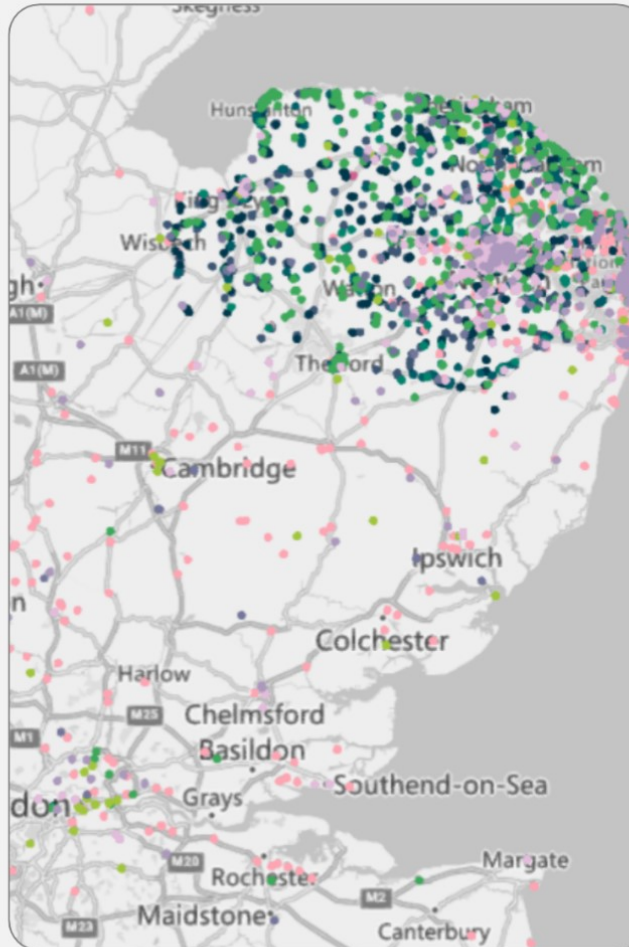
EXPERIENCE SURVEY RESPONSES

The maps below illustrate the distribution of respondents, across the UK, who took part in surveys associated with EXPERIENCE-supported events and the Norfolk Residents Surveys 2020-2023. Also included are surveys businesses supported by the project as well as businesses near EXPERIENCE-delivered infrastructure. EXPERIENCE thanks all respondents who participated in this unique opportunity to capture evolving views and trends of Norfolk residents about the benefits and disadvantages of tourism. These are valuable contributions that will help shape future tourism offer in the region.

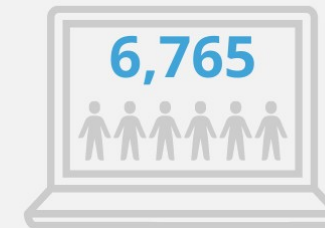
ACROSS THE UK AND...



...EAST OF ENGLAND



-  Norfolk Residents, Summer 2020
-  Norfolk Residents, Winter 2021
-  Norfolk Residents, Summer 2021
-  Norfolk Residents, Winter 2022
-  Norfolk Residents, Summer 2022
-  Norfolk Residents, Winter 2023
-  Norfolk Wonder Open Studios, 2021
-  Fire On The Water, 2021
-  Love Light Norwich, 2022
-  Fire On The Water, 2022
-  Business Impact Survey, 2022 - 2023
-  BVP Business Impact Survey, 2022 - 2023



Visitors, residents and businesses that have **responded** to surveys related to EXPERIENCE

Data were collected and analysed by EXPERIENCE.

1. Delivering actor engagement & training to meet demand (WPT1)

EXPERIENCE Challenge 1 (C1): *“FCE region currently focusses on traditional, destination-based, pre-packaged tourism. Modern travellers are losing interest in this approach.”*

EXPERIENCE Challenge 2 (C2): *“Off-season opening is risky – actors lack marketplace data, support, strategy to operate October-March.”*

The WPT1 approach to addressing C1 was to unite traditional and atypical actors and enable them to understand and develop their unique tourism potential. Tackling C2 focused on identifying skills gaps and creating bespoke training to target needs of regional actors. EXPERIENCE provided mentorship and tailored business support by interpreting trend expectations to meet demand to inform bespoke business plans.

WPT1 Activities Summary

- ❖ Local/regional active engagement events with pilot study actors = 54
- ❖ Pilot study regional networks = 1
- ❖ Organisations in the Norfolk network = 484
- ❖ Targeted, bespoke training materials and resources = 35
- ❖ Training delivery = 121 (5 face-to-face networking events, 22 workshops and 94 mentoring sessions).

WPT1 Outputs

Local/regional active engagement events with pilot study actors (T1.2.1)

NCC held regular meetings with local organisations to ensure a bottom-up approach and held 54 engagements events, exceeding the Norfolk pilot region target of 20.

- ✓ It was useful for partners to hear about successful case studies from external experts about delivering experiential activities and how they achieved it.

Pilot study regional networks (T1.2.2)

A single actor working alone will not attract off-season visitors, therefore developing a cross-sector network in Norfolk was essential to increase

confidence to operate between October to March. NCC created a database of cross-sector organisations across Norfolk to establish a network which was a key innovative aspect of the EXPERIENCE project, uniting traditional tourism stakeholders (Destination Management Organisations, larger/established tourism businesses, local authorities) and “less traditional” tourism actors (wood carver, yoga teacher, glassmaker, artists, etc.), that have authentic local appeal. We now have a network database of 2,400 stakeholders and actors which are active and relevant for experiential tourism development. This database did not exist before and has been fundamental step for stakeholder engagement and project legacy.

In parallel, EXPERIENCE has had regular communication with the network. A total of 26 newsletters and mailshots have been sent to all network members along with (**See: EXPERIENCE DELIVERY MILESTONES**), invitations for workshops and training opportunities. In addition, the Norfolk EXPERIENCES Facebook group provided a platform for businesses to collaborate and share expertise and knowledge (89 members).

The network was mobilised to identify skills gaps (**T1.3.1**) and benefited from the Training Programme delivered in the region between November 2020 and December 2022, including 5 face-to-face networking events, 22 workshops and 94 mentoring sessions (**SEE: WPT1 Case Study 1**). These regular events offered an opportunity for participants to ask questions and share their experiences with others. We also worked with the local DMOs and business support organisation (e.g., Federation of Small Businesses, New Anglia Growth Hub, etc) so tourism businesses could access advice and information.



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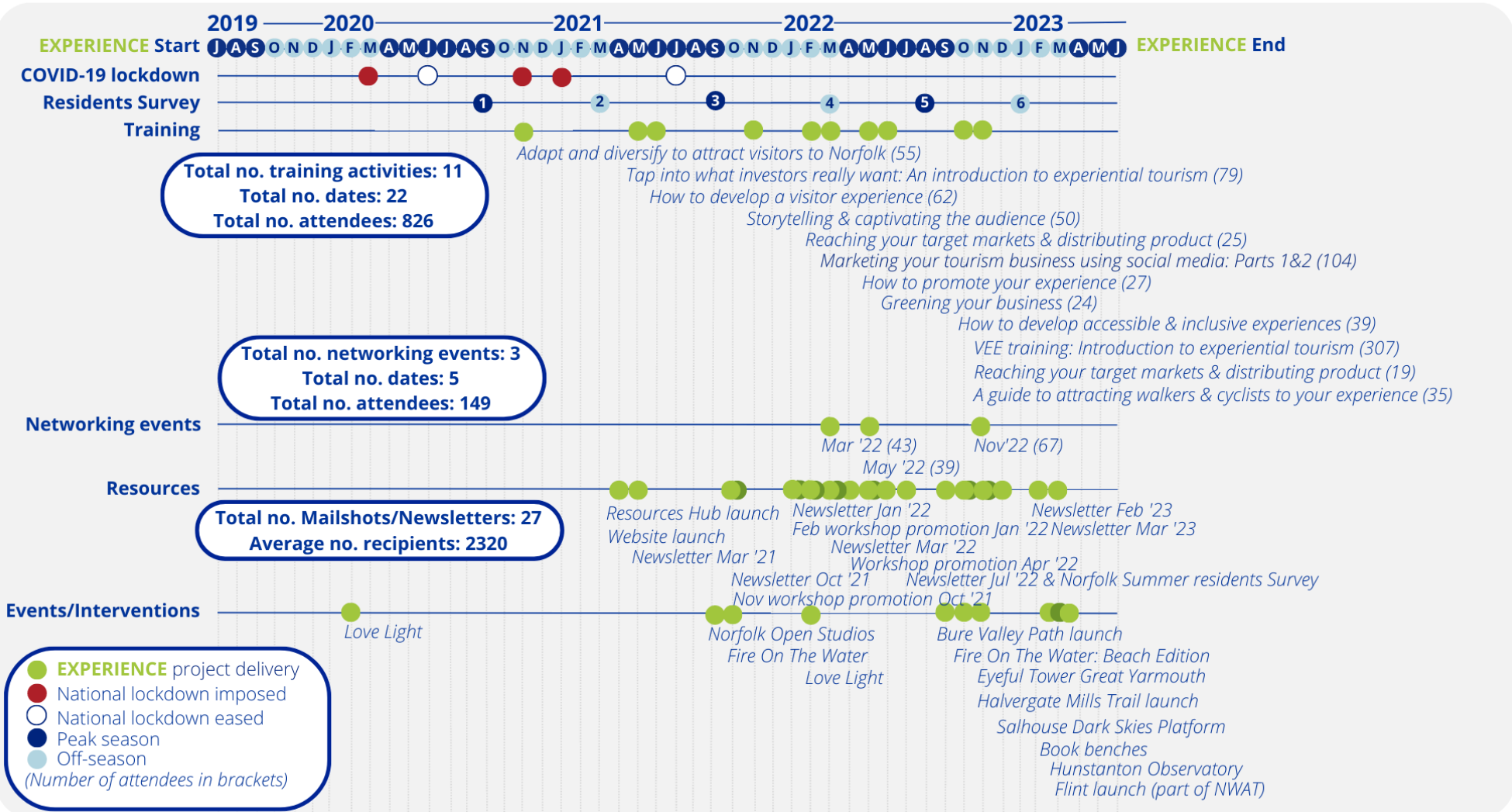
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EXPERIENCE: NORFOLK DELIVERY MILESTONES

The timeline shows key EXPERIENCE project training, delivery and communications milestones. EXPERIENCE has been operating under unpredictable circumstances dictated by the COVID-19 pandemic. Lockdown restrictions, and subsequent easing, in England are shown in parallel to give context to the EXPERIENCE project delivery. The Norfolk Residents Survey was conducted biannually from summer 2020 and responses reflect circumstances relating to COVID-19.



WPT1 Case Study 1: NCC Approach to Delivering Experiential Tourism Networking Events

We united organisations with overlapping interests and helped them develop their off-season tourism potential through bespoke training and networking events.

Who we are

Hélène Pasquier, Senior Project Officer (EXPERIENCE) and Project Manager (FACET), Norfolk County Council.

What we did

We organised a series of interactive networking event where local businesses could get peer feedback to help improve their experiential offer and meet with other businesses to explore opportunities for collaboration. The aim was also to inspire each other in their journey to extend their offer in the off-season and become more sustainable and experiential. This allowed local businesses to hear about best practice and make contact for future partnerships with businesses and local Destination Management Organisations.

How we did it

As a local authority, we worked with local Destination Management Organisations to deliver experiential networking events. It was important to use venues that supported sustainable experiential tourism so we could dedicate part of the day for the owners to host a tour of their venue and share insights about how they developed their off-season sustainable experiential products.

An important part of the day was a Business to Business (B2B) session where businesses were able to present/demonstrate their experience, giving them an opportunity to test and get feedback on their offer. This was followed by group discussions to support improving the current experience: explore targeting



new markets, increasing visibility in the marketplace, pricing structures, making the offer more experiential, potential collaboration opportunities, etc.

Finally, we held a speed-networking session so everyone could speak to fellow businesses / local organisations and have a chance to develop contacts and begin to think about collaboration.

Top tips

Don't hesitate to have B2B sessions integrated in any other events. It doesn't take long and can be very informal.

Organise events in central locations but also explore the potential to hold them in more rural/remote locations to attract different types of businesses.



Despite continued challenges faced by the tourism industry in the last two years, (staffing crisis, impact of COVID-19, cost of living crisis), this bottom-up approach has enabled tourism stakeholders in Norfolk to work collaboratively and strategically, supporting the development of a more sustainable, inclusive, and accessible off-season offer across the county (**WPT2** and **WPT3**). This resulted in the delivery of 357 activities, 106 itineraries, 3 local events, 10 interpretations, 3 last mile gaps and a target of 20 infrastructures (WPT2 and WPT3), thus reducing risks to open between Oct to March.

- ✓ Engagement with/buy in from local districts is important; they can support wider dissemination to their own contacts/ local businesses.
- ✓ Identify key local organisations that already have good networks to build on and aim to strengthen these existing networks to enhance impact.
- ✓ Invest in a Customer Relationship Management system from the outset. This could be a more effective approach than trying to set up your own database within the restrictions of existing corporate systems.

Skills audits and training needs analysis (T1.3.1)

Operating a tourism business off-season can be a huge financial risk so it was important to understand current knowledge gaps and missing skillsets to inform development of a training programme that would meet these needs.

NCC collaborated with Visit East of England to produce the Business Skills Survey (winter 2020), which had great participation (223 responses). Results included a snapshot of business sentiment during the COVID-19 pandemic as well as views on extending the season and perceived barriers. To understand familiarity with “experiential tourism” and the degree to which businesses were already engaged in this approach. Results showed that 65% of the businesses were not familiar with the term and 67% would welcome more information and training. Top options for training included: Digital and Online Marketing (82%), Capitalise on Local and Regional Events (76%) and Adapt our Business Model to New Trends (68%).

NCC also surveyed attendees to our webinar “Adapt and diversify to attract visitors to Norfolk” (November 2020) and performed a gap analysis of local training currently offered to tourism businesses. This helped to ensure that

existing offerings were not replicated and enabled another level of support for business as we could sign-post them to other opportunities such as training, business support and funding/grants.

Together, these results gave a platform for training and materials developed as part of EXPERIENCE (**T1.3.2** and **T1.3.3**). Upskilling local tourism actors was a key step to give them tools to more confidently meet experiential off-season visitor demand and develop an appropriate offer (**WPT2** and **WPT3**) for Norfolk.

Targeted bespoke training materials and services (T1.3.2)

During the EXPERIENCE project NCC has developed 35 new training resources. Current one-size-fits-all approaches do not work for the variety of actors who are part of the Norfolk network and the skills audit and training needs analysis (**T1.3.1**) enabled development of bespoke learning materials to close gaps and meet regional needs. To support wider distribution, we developed resources across a range of mediums incl. videos, toolkits/guides, to help meet a range of learning preferences.

To help businesses develop their experiences Norfolk delivered 22 workshops including, “Marketing & Social Media; How to Promote Your Experience; Greening Your Business” to help businesses develop their tourism experience. Each online training was delivered live twice and scheduled at different times of the day to allow for caring responsibilities, different business types/ opening hours and people in full-time employment, contributing to the horizontal principles of EXPERIENCE.

To support wider distribution, trainings sessions were recorded (9 videos) and used to create 10 shorter bite-sized videos such as, *5 top tips to develop an experience; Tourism market segmentation for low season; How to Make Your Tourism Business More Sustainable or Get Your Sustainable Message Right*. NCC has 19 live training videos that have now had over 1000 views on our YouTube channel (<https://youtube/iPnFFUN5IRk>). These resources are, also available on the Resources Hub (**T1.3.4**), along with 3 toolkits to complement the training materials.

Also available on the Resources hub is a report from the University of Northampton on Norfolk ethnic minority tourism (**T4.2.1**). As an under-

researched topic, their research provides insights on the travel motivations and preferences of domestic diverse ethnic groups, their perceptions of the leisure and tourism experience and reasons for their low levels of participation in the domestic tourism market. The research was shared with DMOs and local stakeholders, supporting project legacy.

One final resource is guidance to support improving accessibility inclusiveness of new experiential activities. The guidance looks at considerations for visitors with accessibility needs (including mobility, vision, hearing and cognitive needs), and how even small changes could make a difference. Everyone's access needs are different so no experience could ever claim to be 'fully accessible' but providing additional accessibility information can help people decide whether it's suitable to their particular access requirements.

All materials are available for free on the Resources Hub (**T1.3.4**) in English and in French.

- ✓ It is important to spend time researching and understanding local needs, offers and opportunities to ensure added value by not recreating something that already exists.
- ✓ Working with smaller, "less traditional" businesses require a lot of nurturing and expertise which impacts staff time and resources Having tourism expertise to support development and delivery of training is invaluable and could really impact the quality of your offer.
- ✓ Be flexible and ready to revisit your approach if something isn't working or the focus/need shifts. Over the last year of the project, we moved from a district-by-district approach to a targeted geographical model focusing on areas of Norfolk where there were not many businesses involved.
- ✓ Providing training materials in variety of formats (bite size videos, toolkits, presentations, etc) will help reach more people.
- ✓ scheduling regular breaks at events will help facilitate informal networking over a cup of tea!
- ✓ Consider the accessibility of your training. For example, an evening session could allow people with carer responsibilities, or those in full time employment, to attend a workshop.

- ✓ It is important to include interactive parts to the training sessions.
- ✓ When using case studies as part of your training sessions, make sure you choose things that local stakeholders can identify with.
- ✓ When hosting online workshops, good preparation to ensure smooth facilitation is key. Ensure that guest speakers join at least 15 minutes before the starting time.
- ✓ YouTube is a good medium for reaching a wider audience, so setting up an account at the start of the can be very useful.

Training delivery (T1.3.3)

Since the start of EXPERIENCE, Norfolk has delivered 121 trainings. In line with survey results (**T1.3.1**), NCC developed a training programme which responded to local stakeholders' needs. This in turn helped increase confidence when developing off-season experiences. (**See: EXPERIENCE DELIVERY MILESTONES**).

The training delivered accounted for the diverse operating nature of tourism stakeholders; supplying the right help, to the right people at the right time, in the right format. An innovative aspect of EXPERIENCE was to work with "less traditional" businesses. They are generally very small businesses, often a sole trader and can have complex needs. NCC worked with tourism experts to provide the best quality support, especially in context of the extreme challenges faced by the tourism industry. During the project, we delivered 94 bespoke 1-2-1 mentoring sessions offering free advice and support.

Working in collaboration with local DMOs, Norfolk delivered 5 face-to-face networking events, across the county, including rural areas to reach a wider spread of businesses. This supports project legacy as DMOs are more and more interested to apply the EXPERIENCE approach in the day to day running of their organisation.

The innovative networking and training approaches EXPERIENCE has taken to unite those seeking to develop off-season experiential tourism offer succeeded in fostering new collaborations between local businesses (**SEE: WPT1 Case Study 2**); improving businesses visibility to attract new audiences (**SEE: WPT1 Case Study 3**); supporting businesses in marketing their existing experiences for off-season tourism (**SEE: WPT1 Case Study 4**) and encouraging

businesses to adapt their offer to be more accessible for all. ([SEE: WPT1 Case Study 5](#)).

[Resources Hub \(T1.3.4\)](#)

Training resources developed by the Partnership are available on the Resources Hub (which has been embedded into the Project website) with materials in both English and French. This is aimed at both traditional and “less” traditional businesses and individuals looking for resources to help them develop their own experiences.

The Resources Hub hosts a good mix of materials organised into 6 chapters, each divided into 3 groups: Library, Case Studies and Videos. The chapters provide a clear educational journey through experiential tourism, starting with *‘What is experiential tourism?’*, then explaining the off-season characteristics and challenges, followed by *‘How to create and market experiences’* and ending with *‘Benefits of experiential tourism’*.

There are various materials: written reports, presentations, toolkits, real case studies and videos. By combining resources produced by EXPERIENCE project partners, the hub provides a powerful mix of local and international perspectives on tourism. This shows tourism stakeholders what was done locally & how. It also provides insight on international trends and approaches to experiential tourism.

WPT1 Case Study 2: Sutton Staithe Boatyard

We formed new local collaborations to boost our visitor experiences and reach new audiences, especially during the off-season.

Who we are

We are an independent and growing boatyard situated on the River Ant in the heart of the Broads National Park, our origins as a boatyard date back to 1808 when we were a major Wherry building centre. To celebrate this heritage, we are currently developing our classic boat restoration programme, where boats dating back to the 1900's are lovingly restored. We also offer a Boat Recovery service to the entire Norfolk Broads network to provide boaters with complete peace of mind when out on the water. We employ up to 12 local people and locally source as much of our material and parts as possible. We also offer picnic and dayboat hire, as well as canoe and kayak hire, so that visitors can enjoy the nature and wildlife of the Sutton Broad RSPB Nature Reserve as well as the abundance of wildlife on the River Ant.

What we did

The one-to-one support offered by the EXPERIENCE project has helped us take the next step in offering memorable self-guided experiences to our guests by enhancing our electric day and picnic boat offering, focusing particularly on the period from October to March when we usually see business volumes decline.



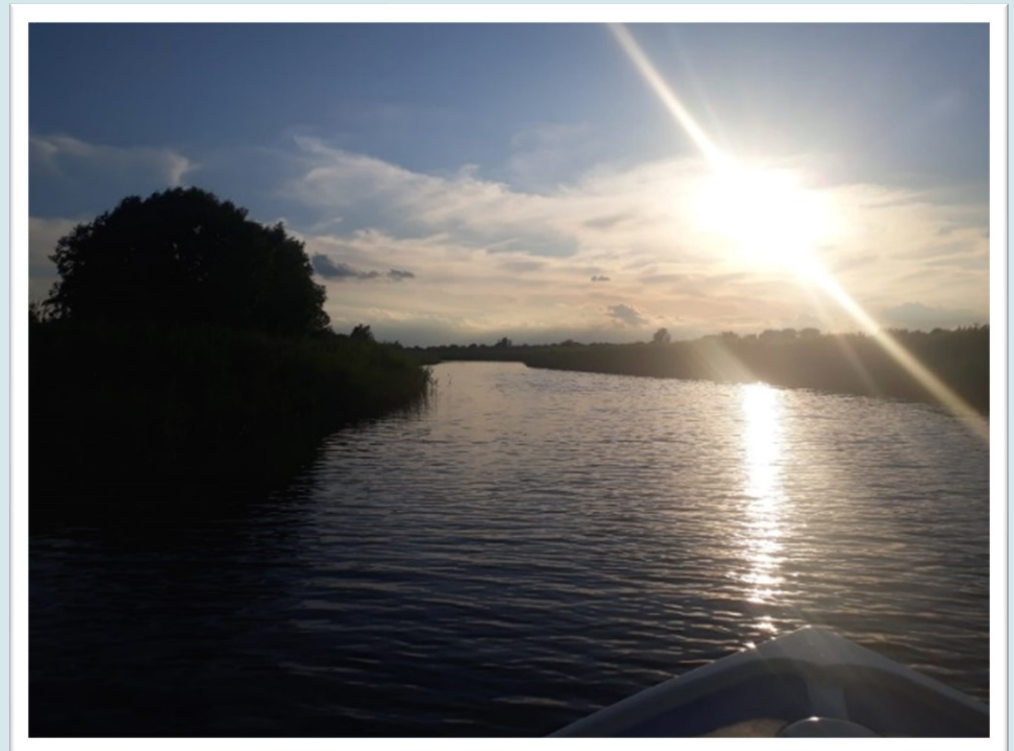
We collaborate with a local business to offer locally sourced hampers and provide a detailed narrative about the landscape and wildlife during the different seasons so that visitors get more from their trip.

EXPERIENCE support has also helped us to secure a more formal collaboration with the RSPB at Sutton Broad and we continue to work with them to develop a spring and autumn guided tour, so guests can learn directly from a RSPB warden or trained volunteer. Making our business more experiential and more

focused on the enhancing the visitor experience year-round will have a positive impact on our revenue compared to previous years when no such activities existed.

How we did it

We built on the one-to-one support offered by the EXPERIENCE project, looking at ways to enhance our visitor experience using the resources we had available, promoting our sustainable electric boats and our unrivalled proximity to RSPB protected landscapes that can only be viewed from the water. We are pro-actively working with RSPB to provide the boat and captain to allow for brand new experiences to be offered as well as gaining RSPB inputs to develop new and seasonal guide materials to support our self-guided experiences throughout the year.



WPT1 Case Study 3: The Locks Inn Community Pub

We diversified the type of clients we get through becoming visibly Cycling friendly.

Who we are

Christine Pinsent is part of the management team at The Locks Inn Community pub in Geldeston, on the bank of the River Waveney. She has been a driving force to make this social hub more attractive to cyclists thus strengthening the sustainability of the place and diversifying the audience.



What we did

The flat country roads of Norfolk are an ideal place for cyclists to pedal and discover the rich wildlife and beautiful landscape that are especially unique in the UK in autumn and winter. We offer a cosy resting place to cyclists where they can safely lock their bikes and warm up on colder days.

How we did it

Through the one-to-one support from the EXPERIENCE project, we have been successful in securing Cycling Friendly accreditation from Cycling UK. This provided us with some free cycling equipment, including a pump, tools, a puncture repair kit and a first aid kit. In addition, free publicity via Cycling UK's 71,000+ membership base and their Cycle Magazine with a readership of 86,000. We now also get increased visibility and recognition, with a listing on Cycling UK's 'Cyclists Welcome' online directory.



This allows us to welcome a greater number of cyclists to the pub to enjoy our local food and ales as well as to experience traditional music and storytelling.

EXPERIENCE has helped us to promote what is different and what stands out from other similar venues,

folk music, storytelling and promoting sustainable travel as well as utilising the fantastic cycle routes in the area. To support us extending our reach to new visitors, and not just to locals, we use live storytelling so that visitors can learn about our local history.

Top tips

Cyclists can travel all-year round. Don't hesitate to add information on your website so cyclists learn about cycle routes around your business, are aware that they can lock their bike safely, that their muddy boots are welcomed or that there is a space for them to dry their clothes if needed!



WPT1 Case Study 4: The Shoebox Experiences

We re-marketed experiences that were better suited to off-season tourism creating a steady income all year.



Who we are

We are a Norwich based social enterprise, a profit for purpose organisation, creating supportive environments for people to connect with each other. We believe life is better when we have meaningful connections, shared experiences and opportunities to discover, laugh and grow together.

What we did

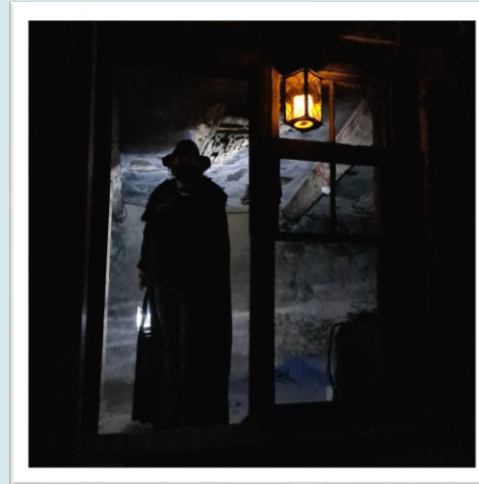
Located in the vibrant heart of Norwich city centre, our members' hub provides a welcoming space for people to connect, offering a wide range of groups and community spaces. Our vision is to lead the way in creating inspiring, supportive and entrepreneurial solutions to build resilient communities and empower local people to make their mark on the world.



The Shoebox Experiences offers fun and memorable experiences within this historic and unique space to create revenue which we plough back into our hub and supporting community projects.

How we did it

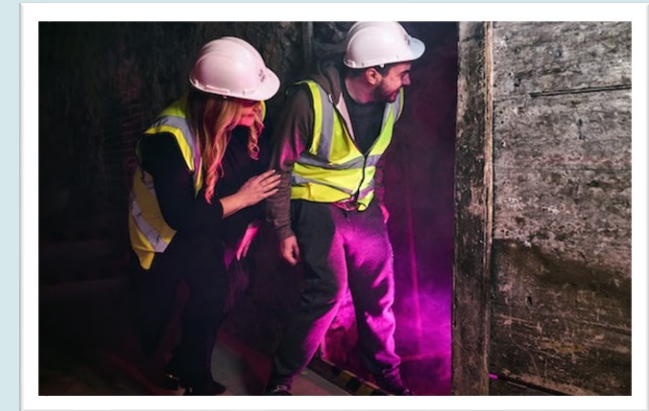
Norwich is full of rich history and underneath our hub we have the remains of a hidden medieval street with its 15th century buildings and architecture. We've been creative in using the 'hidden street' in different ways to generate revenue and give customers an amazing and unique visitor experience. Guests can make great memories together with a Hidden Street Tour, a Lantern Light Underground Tour with just a lantern to lead their way as we weave our way through dark stories from Norwich's history or play a thrilling underground escape game.



Joining the EXPERIENCE training workshops helped us realise the potential of off-season business for our experiences. We identified some experiences that are better in the off-season, for example our Lantern Light tour is particularly popular over winter, allowing us to make the most of the spooky, cold, and dark nights. EXPERIENCE training also helped us rethink how we market our experiences to reach new audiences.

Top tips

Think carefully about your unique selling proposition and which features of your product make attending in winter better, that way you can attract visitors year-round and ensure a steady revenue stream even in shoulder months.



WPT1 Case Study 5: Cheryl Cade – Beer sommelier and educator

I gained confidence to apply my diverse skillset that adapted my business and enhanced the accessibility of the experiences I deliver.

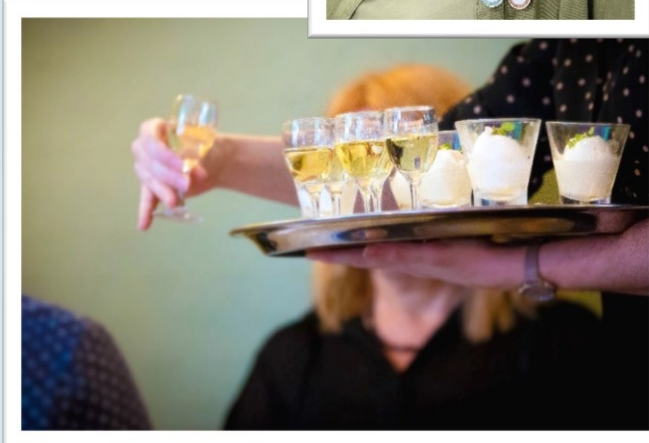
Who we are

Cheryl Cade, a Beer & Cheese Educator, and a Beer Sommelier. I run a range of experiential tours in Norwich that combine local history with cheese, beer, or gin.



What we did

There is nothing I like more than talking to people about food, drink, and history. I have grown up surrounded by the historic beauty of Norwich and Norfolk, developing a passion for its local produce along the way. I have a passion for education with fun, so I have developed partnerships with a number of local suppliers to provide visitors with a greater understanding of their production and ethos. As a private tour guide to this fine county or city, visitors will feel like they have been welcomed into a community that values the finest local produce and good conversation.



How we did it

I have found the EXPERIENCE project to be extremely beneficial to help me develop a business, that I started one week before the COVID-19 pandemic. Firstly, it has given me the confidence to continue to build and adapt in this dynamic sector. EXPERIENCE promoted my business on the Be Norfolk website, which has helped me focus on the social media aspect, alongside

enabling me to build partnerships with other guides, venues, and people outside of the area. Through EXPERIENCE I had the opportunity to test my ideas out with a minority group and the workshops encouraged me to develop a greater understanding and knowledge of my client base alongside its expectations.



The ethos of sustainably, accessibility and environment have become more valued within my business. Although some of my tours involve the use of private transport, this is more for less accessible venues within the region and where possible I promote the use of local public transport or walking. I also use local produce to support local businesses.

I had not valued my skills in British Sign Language and Special Educational Needs as part of the business. EXPERIENCE has led me to be more aware of this, “accessible” element to my business and I have had five tours in the last year that have used these skills. I do not think that I would be as confident, or my business would be on the firm foundations it currently is if it was not for the support, training, connections and insight EXPERIENCE and everyone involved has given me. My business started on very rocky grounds with COVID-19, and I thought it would not survive, but it grew and developed by 35% in 2021 and 50% in 2022.



Between Autumn 2022 and Winter 2023, EXPERIENCE circulated a survey to businesses who received support from the project, 30 individual businesses responded to the survey, giving valuable feedback about the support and resources EXPERIENCE provided, as well as their views on the impact external factors such as the impact of COVID-19, Brexit, and the increasing cost of living has had on their business.

Most businesses supported by EXPERIENCE either partially or fully recovered from the effects of COVID-19, with 30% reporting that they are performing better than pre-pandemic. 65% of businesses anticipate that the ongoing cost of living crisis will be bad or very bad for their trade (**SEE: NORFOLK BUSINESS IMPACT SURVEY I**). There are optimistic signs for economic growth as 27% of businesses report an increase in employee numbers by an average of 2 full-time jobs. Since autumn 2021, business more businesses have been opening during the off season with reports of steady growth in the average numbers of visitors with the median more than doubled and the mean more than quadrupled between Autumn 2021 and Autumn 2022 (**SEE: NORFOLK BUSINESS IMPACT SURVEY II**). Reasons for notable changes in visitor numbers included increases in corporate travel, more domestic visitors opting for staycations rather than holidays abroad and, since the pandemic, more people have confidence in socialising, travelling, and eating out.

Most businesses supported by EXPERIENCE attended the networking events and online training workshops. Almost half of businesses felt that EXPERIENCE helped them create a more sustainable and flexible business model for the future (**SEE: NORFOLK BUSINESS IMPACT SURVEY III**). Changes that effected positive outcomes included developing fresh off-season products as well as adapting existing offer for the off-season, others collaborated with local business and suppliers to mutual benefit, and some were inspired to take a different approach in marketing their tourism offer.

Some businesses felt the training and support provided by EXPERIENCE did not quite cater for their business model requirements. Others felt that they hadn't fully grasped how to use the resources provided to their best advantage. This is much appreciated feedback that EXPERIENCE can use to expand its training delivery content and the support given in the 1-2-1 mentoring sessions.

Taken together, the networking and training strategies led by EXPERIENCE has succeeded well in filling a gap in the off-season experiential tourism offer in Norfolk. While it is still too soon to determine the long-term economic impact of this effort, particularly during a time of national and global financial uncertainty, local businesses with shared goals have been united into a regional network and informed about shifting travel trends and equipped with strategies to cater to an evolving travel market. Thanks to the support given by EXPERIENCE, new tourism products have been created where they did not exist before and have considerable potential in attracting new audiences to the region as well as encouraging residents to engage with new experiences on their doorstep.





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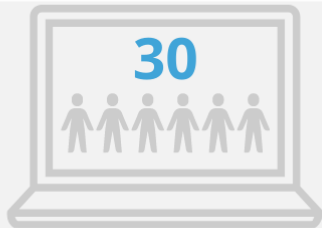
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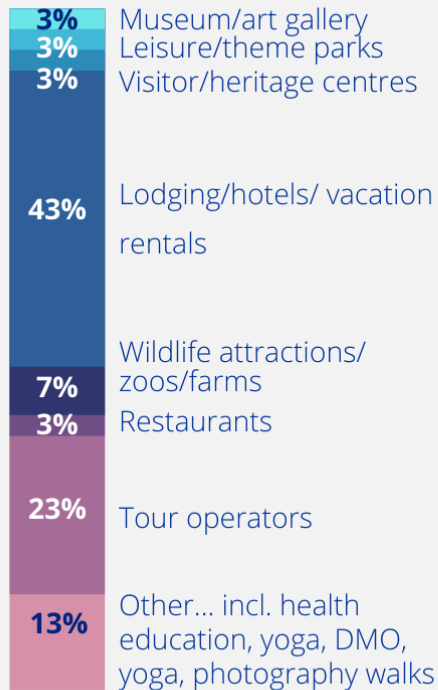
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NORFOLK BUSINESS IMPACT SURVEY I TOURISM IMPACT ON ECONOMIC PERFORMANCE

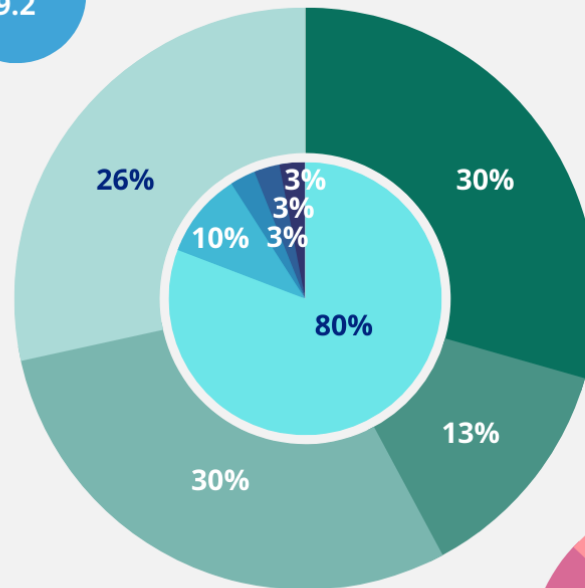
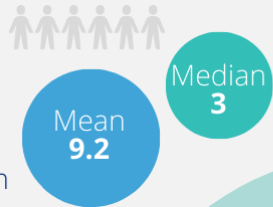
EXPERIENCE worked with businesses in Norfolk keen on creating or developing experiential tourism offer and over 30 responded with thoughts on the impact they anticipate the support will have on their business. Since 2021, almost a quarter report an increase in the number of employees. Over 40% of businesses have recovered or perform better than pre-pandemic.



Norfolk businesses surveyed in
Autumn 2022 - Winter 2023



No. Employees
27% of businesses had an **increase** in **employee numbers** by an **average of 2** since autumn 2021







What has the effect of Brexit and the cost of living crisis been on your business?

How does your business normally operate?



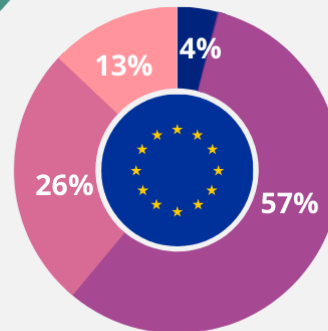
COVID-19 impact recovery

-  Yes, we have recovered to pre-pandemic level
-  Yes, we perform better than pre-pandemic level
-  Yes, we have partially recovered to pre-pandemic level
-  No, we may never fully recover from COVID-19

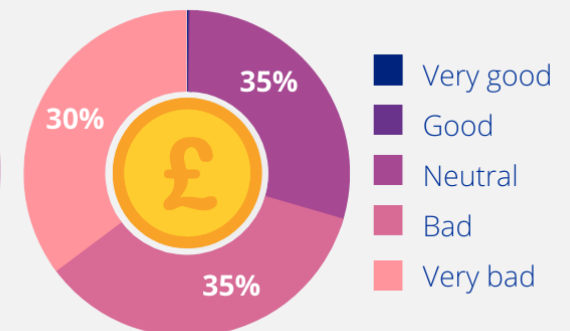
No. visitors before COVID-19 (per year)

-  < 20,000
-  20,001 - 50,000
-  50,001 - 100,000
-  150,001 - 200,000
-  > 200,000

Brexit



Cost of living



Data were collected and analysed by EXPERIENCE.



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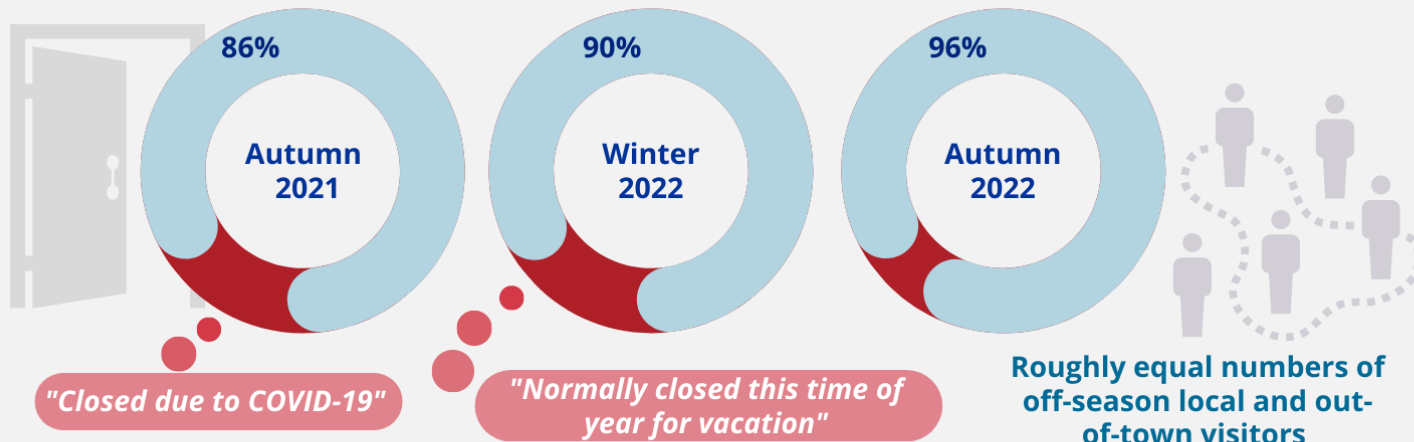
EXPERIENCE
European Regional Development Fund

 **Norfolk** County Council

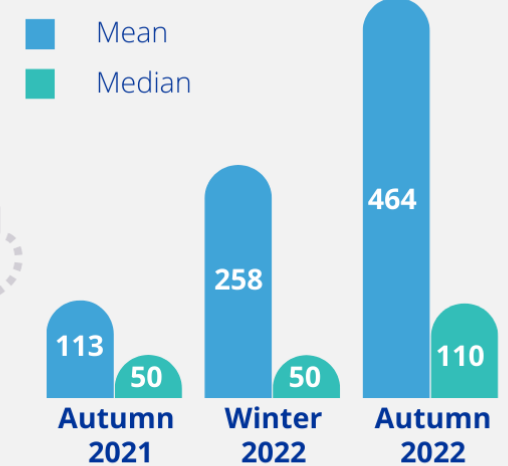
NORFOLK BUSINESS IMPACT SURVEY II TOURISM IMPACT ON ECONOMIC PERFORMANCE

Though national COVID-19 lockdown restrictions were lifted in July 2021, the spread of the Omicron variant in Autumn 2021 meant that public indoor gatherings required protective measures such as face masks. The majority of EXPERIENCE-supported businesses were open in Autumn 2021 and more continued to open in Winter 2022 and Autumn 2022, resulting in increasing numbers of visitors.

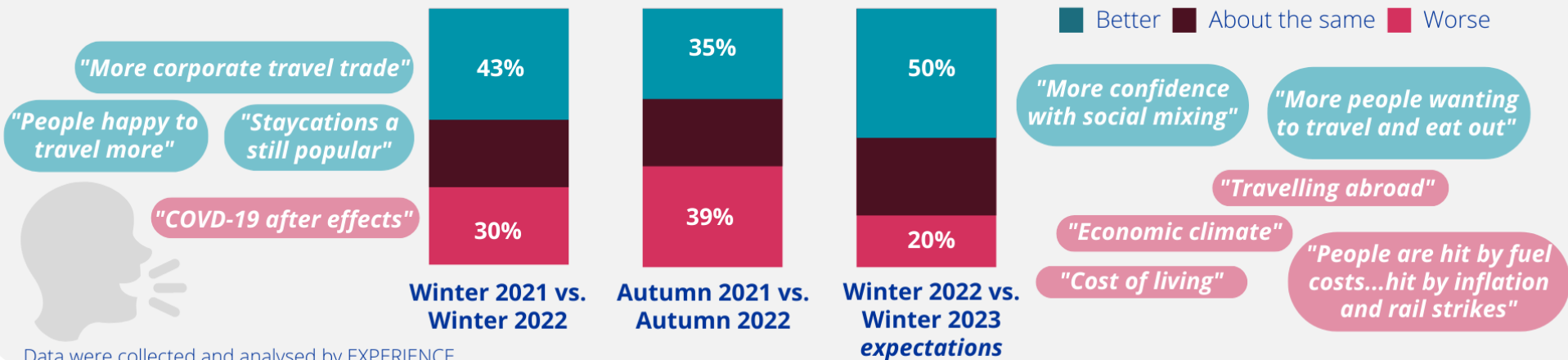
% of EXPERIENCE-supported businesses OPEN during off-season



Average number of visitors



Notable changes in visitor numbers...



Data were collected and analysed by EXPERIENCE.



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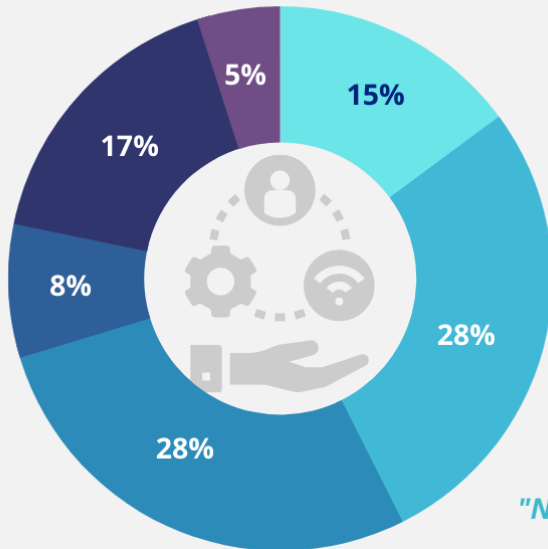
 **Norfolk** County Council

NORFOLK BUSINESS IMPACT SURVEY III

TOURISM IMPACT ON ECONOMIC PERFORMANCE

EXPERIENCE provided businesses with a variety of support options to develop experiential tourism offer, e.g., 1-2-1 discussions and networking events, the most utilised of which were the online training workshops and access to training resources. Feedback on how the support impacted their business performance, provided EXPERIENCE and NCC a sense of which strategies worked well to give added value and which can be further developed.

Business support and resources provided by EXPERIENCE



- 1-2-1 discussions/support
- Networking event
- Online training workshop
- Use of training resources (e.g. videos, toolkits, manuals.)
- Advertising on the BeNorfolk website
- N/A

Data were collected and analysed by EXPERIENCE.



41% of businesses felt EXPERIENCE training and mentoring programmes **helped them develop or improve their off-season offers**



47% of businesses felt EXPERIENCE has **helped them to create a more sustainable/flexible business model for the future**

"By partnering with other businesses we are offering a November stay package – we normally close this part of the business end of October"



"We are more confident in what we offer and we were helped to come up with off season products"

"Helped me think and develop new experiences"

"I've created a we page for cycling & walking breaks which will hopefully begin to generate traction."

"Given me much more confidence to expand marketing"

"I am more aware of the customers and the groups to aim for"

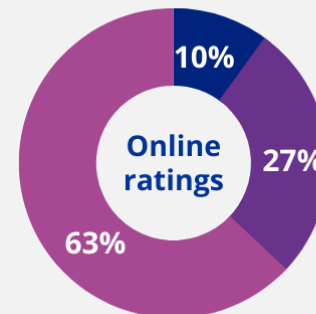
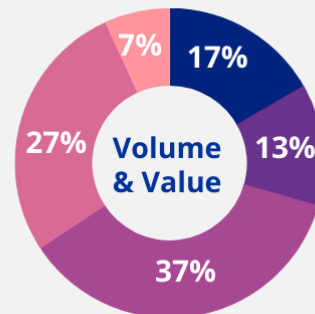
"Haven't fully grasped how to use resource"

"Collaborating with other suppliers"

"None of the tourism bodies are able to cater for my business model."

"Single owner/manager so working practices hard to change – slightly different advertising helped"

EXPERIENCE support impact on business performance



- Better/Increased
- Prefer not to say/Don't know
- About the same
- Too soon to say
- Worse/Decreased

2. Delivering experiential tourism offer using unique natural & cultural assets (WPT2)

EXPERIENCE Challenge 3 (C3): *“There is no tourism offer October-March to attract visitors (attractions are closed, no AirBnB Experiences in pilot regions).”*

The WPT2 strategy to address C3 was to harness the unique tourism potential of traditional and atypical actors and assets to develop new tourism activities for October-March. Norfolk contributed to the project’s target of 1520 new tourism activities unique to the off-season, 9 new off-season events and 600 themed experiential itineraries for different durations to increase visitor length of stay (e.g., long weekends, 1 to 14 nights). Additionally, a target of 33% of the itineraries were created to be suitable for visitors with a range of access needs.

WPT2 Activities Summary

- ❖ Experiences created or adapted = 368
- ❖ Itineraries created = 50
- ❖ Off-season events supported = 3
- ❖ Exciting interpretation = 10
- ❖ Closing last mile gaps in tourism = 3

WPT2 Outputs

Off-season tourism options analysis (T2.2.1)

The Norfolk Options Analysis (OA) was carried out between September 2020 and April 2021 to determine the opportunities and unique regional selling points that could be harnessed to develop off-season tourism experiences. A collaborative consultation approach, ensured we gathered knowledge, experience and views across the whole of Norfolk, including, local businesses, nature and culture organisations, destination marketing organisations, access groups and residents. The data from this work alongside a review of over 500 countywide natural and cultural assets with experiential tourism enabled us to identify viable off-season, experiential tourism options. Working with stakeholders, small businesses residents facilitated a bottom-up approach to future tourism development, creating engagement, a sense of ownership and firmly rooting subsequent project outputs in sustainability and net gain for Norfolk.

Key principles that the report highlighted include:

- The principle of “*adding out of season value*” was considered as important as “*creating new out of season options*”
- Unique, place-making natural and cultural assets are used to develop authentic tourism experiences
- Communities and atypical stakeholders are engaged in experiential tourism from the beginning
- Atypical locations and stakeholders are considered to diversify the tourism economy (spread benefit and avoid creating off-season honeypots).

The OA report also presents valuable research into travel markets and audience segmentation (**T4.3.1**) and has been instrumental in informing development of WPT2 products.

- ✓ Running a public survey helped to identify Norfolk's unique cultural and natural assets.
- ✓ It was important to only include options that are sustainable and do not have negative impacts for the environment.

Develop new off-season tourism activities (T2.2.2)

To date, EXPERIENCE has supported development of 368 new or adapted activities focussed on Norfolk’s cultural and natural assets (**SEE: EXPLORE NORFOLK EXPERIENCE ACTIVITIES**), all showcased on the Be Norfolk website **WPT4**. Support from EXPERIENCE helped many small businesses to adapt or diversify their summer tourism offer to be suitable for the off-season, adopt inclusive marketing strategies to attract new audiences (**SEE: WPT2 Case Study 1**) and develop new, sustainable off-season products that embrace locally-sourced supplies (**SEE: WPT2 Case Study 2**).



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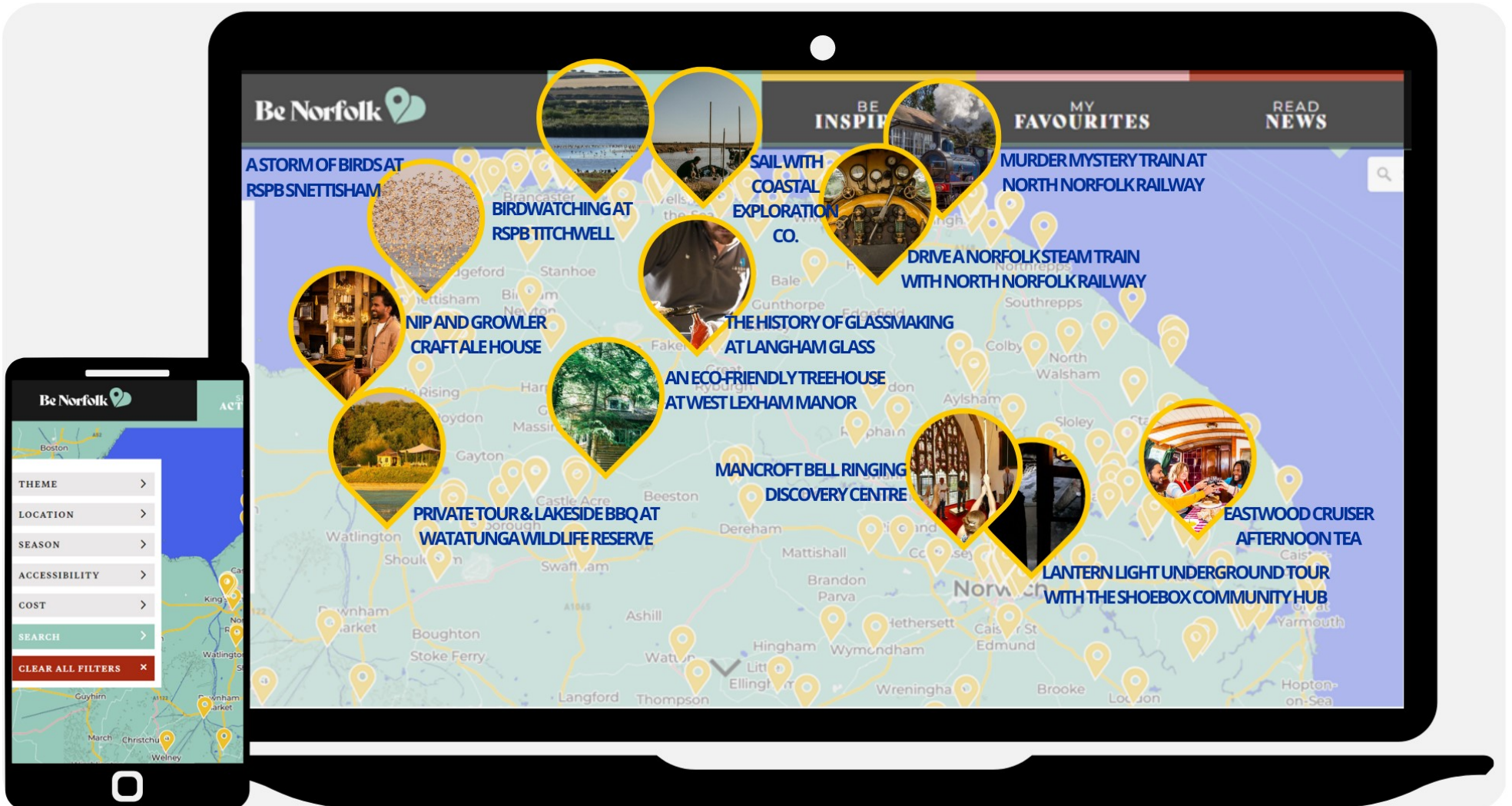
EXPERIENCE

European Regional Development Fund

 **Norfolk** County Council

EXPLORE NORFOLK EXPERIENCE ACTIVITIES

The Be Norfolk website recommends hundreds of unforgettable new Norfolk experiences, all handpicked by locals. The platform, developed by EXPERIENCE, provides users with ready-made itineraries, linking passions and interests. Filters allows users to search by theme, location, season, accessibility and cost. The platform showcases, wherever possible, free of charge or sustainable things to do, making the most of low season travel. Users can download bespoke itinerary to a calendar and share with friends.



WPT2 Case Study 1: Eastwood Cruiser – Afternoon Tea

We adapted our summer offer to the winter to attract a more diverse audience and to extend our season.

Who we are

Husband and wife, Andy (Boatyard Engineer) and Annie (Customer Care/Marketing) Hamilton, are the owners of Eastwood Whelpton, which offers a range of



sailing and historic cruiser experiences as well as 'Learn to Sail' holidays in the Broads National Park. As a result of EXPERIENCE, they now offer a new Autumnal Themed afternoon tea experience on their historic cruiser.

What we did

Eastwood Whelpton offers a range of sailing and historic cruiser experiences as well as 'Learn to Sail' holidays in the Broads National Park. As a result of EXPERIENCE, they now offer a new Autumnal Themed afternoon tea experience on their historic cruiser.

We redesigned our summer experience of afternoon cream tea and adapted it to the cold winter months. We embraced what comes with the autumn and winter, the cold wind, the rain but also its cosiness and the beautiful landscape and wildlife that are unique in this season. And we turned them into features to offer a warming experience, including mulled wine and afternoon tea in a heated cruiser cabin.

How we did it

'We are looking at further extending our offer by adding another classic wooden Norfolk Cruiser to our fleet. We needed to find ways to generate additional income to finance the refurbishment of the boat. Instead of closing after the busy summer season, the EXPERIENCE project supported us to extend our offer by adapting our products to attract visitors travelling in the off-season.



that depict colder weather and displaying people with woollen jumpers and winter hat. Those photographs reflect the cosiness and warmth that is so typical in those slower months.

Part of this work also included our desire to diversify our audience. Traditionally, sailing attracts financially comfortable people, often from a white ethnicity. It was important that our pictures showed a diverse group of people to highlight inclusivity and support extending our target market.

Top tips

Ensure your marketing tools reflect the autumn/winter so visitors can identify themselves to the experience they are about to book into!



We changed our summer traditional afternoon tea experience to include warming beverage such as mulled wine to keep our customers warm.

We also worked on our imagery with a local photographer who took pictures

WPT2 Case Study 2: Coastal Exploration Company, Wild Goose Chase

We created a new way for visitors to experience a natural, annual wild goose spectacle on the North Norfolk coast.

Who we are

Norfolk County Council
EXPERIENCE Project Team.

What we did

As part of the project two free activities were developed that allowed people to experience the wild goose spectacle.

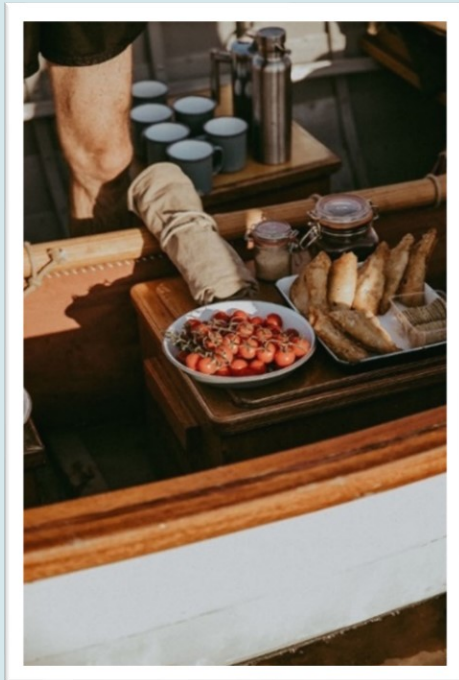
However, after working with CEC a paid for experience was developed

that offered a new water-based offer, taking people into the salt marshes in a



sustainable goose friendly way. This new eco-friendly tourism product showcases and utilises the wild bird movements Norfolk is famous for.

How we did it Working with CEC we combined elements of their existing offers with something that did not previously exist locally, combining nature and history. Before birdwatching became popular, Wells-next-the-Sea was famous for its wildfowling with local people acting as guides for wildfowlers such as Sir Peter Scott. This rich history mixed with information about the life cycle of the pink footed geese forms the basis of a guided journey into the salt marshes around Wells. This brand-new bespoke tour was created to include components that



complemented what bird watchers to Norfolk might want to experience, but from a completely new and unique viewpoint and location.

Fresh local food and drink, served on the boat while watching the geese, help make this trip memorable and even more experiential. This new “Wild Goose Chase by Boat” offer allows people to experience something different as they journey through the salt marsh creeks, searching out the geese and watching them from a safe distance.

Top tips

Businesses can be busy at different times of the day or year, particularly around holiday periods, making initial contact and engagement difficult. Take that into consideration when scheduling initial engagement so the business is more likely to have time to consider what you are offering and how you can help them. Keep any paperwork to a minimum to help any concerns about how much time a small business will have to commit in order to develop their experiential offer.



EXPERIENCE project partners NCC and Cycling UK worked together to develop 6 Cycle Hubs across Norfolk, involving 32 accredited cycle friendly places. The Cycle Hubs combine quality, varied cycle routes with Cycle Friendly Places to eat, relax and sleep. These destinations will provide everything a cyclist needs during their trip, and so will boost visitor numbers, increase length of stay, and increase spend in local businesses. The cycling hubs align with NCC strategic priorities of increasing active travel and improving the Green Infrastructure Network across the county. The pilot Cycle Hub in Hoveton/Wroxham is only 8 miles from Norwich and 20 miles from both Cromer and Great Yarmouth, well situated for arrival by bike or train, which promotes a sustainable travel option.

- ✓ Setting out a clear working structure (will help to kickstart activity development and provide direction).
- ✓ A variety of “activities” from business, cultural and natural perspectives will help you see the full picture and synergistically form themes and itineraries.
- ✓ Find business and free activities that can work as regional clusters as this gives people choice and the chance to stop and enjoy an array of different and varied activities.
- ✓ Engaging businesses in new experiential product development can be very time and resource heavy as 1-2-1 support is essential.

Supporting events (T2.2.3)

NCC supported the Love Light Norwich Festival (February 2022), developed by Norwich BID. Love Light Norwich brought unexpected magic to the city streets through stunning installations, performance, projections, a city centre procession, and much more for everyone to experience, all for free (**SEE: WPT2 Case Study 3**). EXPERIENCE project partners NCC and Cycling UK worked together on their supporting event, Norwich Glow Ride. Love Light Norwich promoted sustainable travel messaging for getting to the event and linked with Visit Norwich to encourage weekend stays. Businesses rated the importance of the festival in attracting more tourism associated economic value to the city, as of 4.68 out of 5.

NCC worked closely with the festival organisers to gather data relevant to EXPERIENCE project outcomes of economic, environmental, and social impact. 405 visitors responded to the survey (**SEE: LOVE LIGHT NORWICH 2022 SURVEY – KEY OUTCOMES**) reporting high levels of visitor satisfaction (87%)

and support for winter tourism (91%). 60% of visitors came from outside Norwich. Based on the average Norfolk visit value in 2022, NCC estimates the visitor value of Love Light 2022 at £1.1 M (€1.3M, equivalent to 21 FTE jobs) in local spend. Businesses rated the festival very favourably in terms of attracting more tourism associated economic value to the city with most businesses in support of this being an annual event.

EXPERIENCE supported data collection and evaluation for the Fire on the Water (FOTW) event, organised by Out There Arts in Great Yarmouth, in October-November 2021, and supported delivery of the event in October 2022. Both events had impressive turnouts of 38,000 and 27,846 visitors, respectively (**SEE: FIRE ON THE WATER 2021 – KEY OUTCOMES** and **FIRE ON THE WATER 2022 – KEY OUTCOMES**). EXPERIENCE worked with Out There Arts to gather visitor information through online surveys and included questions related to visitor support for winter tourism as well as travel and expenditure whilst in Great Yarmouth. Across both events, 1,797 FOTW visitors responded to the surveys, reporting 99% and 87% visitor satisfaction in 2021 and 2022, respectively. Around 8 out of 10 visitors felt the events met their accessibility needs. The organisers hosted a “relaxed” night at the event to accommodate the needs of neurodivergent guests. Visitor feedback highlighted that, when planning similar events in the future it is important to fully consider the accessibility to seating and WC facilities, as well as the width of the paths to accommodate wheelchairs and pushchairs.

WPT2 Case Study 3: Love Light Norwich

We assembled diverse partnerships to create an event that enticed thousands of visitors into the city, boosting local investment during the off-season.

Who we are

Fiona Roberts, Creative Lead and Project Manager for Love Light Norwich, a 3-day festival held every other February. I deliver this on behalf of Norwich BID (Business Improvement District), a consortium of local businesses working together.

What we did

We were fortunate to receive support from EXPERIENCE for our 2022 festival. Our vision to bring people together, attract off-season visitors, nurture the evening economy, and create an experiential activity for residents and visitors aligns with EXPERIENCE objectives. To deliver a festival of this scale we worked with many partners, including local authorities, retail, businesses, educational, community and cultural organisations, enabling engagement with wide audiences throughout the region.



We organised a series of events including a trail of light installations, light and fire performances, community engagement projects, commercial offer to stimulate the evening economy and a thought leadership symposium, which focussed on mental health and the arts. We concentrated on sustainability and environmental impacts, important themes for our next festival in 2024.

"First time we'd been out for an event in the city since the pandemic began. We don't live in Norwich and came especially. Loved the buzz and variety of the installations and events." Visitor, Love light 2022



How we did it

We held an open call for local, national, and international artists to create light installations and performances. We featured 7 emerging artists from a support programme we developed with the Norwich University of the Arts. We teamed with EXPERIENCE partner Cycling UK to

organise the Glow Ride Event, that saw 150 participants decorate their bikes with lights and cycle around the city. We engaged hard to reach groups including the D/deaf, migrant, aged and LGBTQ+ communities. We had autism friendly performances and a "Wall of Love".

"I loved the diversity, different types of installations, spirit and happiness it created in the city." Visitor, Love light 2022

The month-long commercial offer included a food trail, 42 restaurants offering themed food and drink and 15 Norwich market stalls with extended hours. Stores experienced significant increase in sales when compared to their other locations in the UK. In total, there were 17 commissions, 215 artists and specialists, and 32 educational sessions were held. City footfall increased by 20,000. 86% of people visited hospitality providers and shops during their festival visit, with 50% of businesses experiencing more than 25% footfall increase. Businesses rated the importance of the festival in attracting more tourism associated economic value to the city, as of 4.68 out of 5. EXPERIENCE helped us to deliver a fantastic event and gave us the opportunity prove to future funders that Love Light Norwich can deliver an off-season event that thousands of people will attend.



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 **Norfolk** County Council

LOVE LIGHT NORWICH 2022 SURVEY: KEY OUTCOMES

In February 2022, the winter darkness was illuminated with dazzling light installations, projections and performances around the city. Love Light was organised by Norwich Business Improvement District and supported by the EXPERIENCE project.

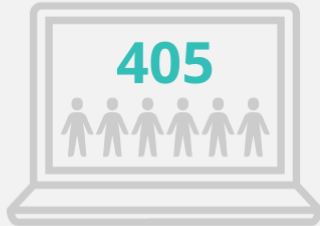


17,175



Attendees, including participants in Love Light Glow Ride

405



Respondents completed the online survey

Visitors came from all over England

BARNSELY
BEDFORD
CAMBRIDGE
CHELMSFORD
IPSWICH • LEEDS
LONDON • LUTON
SHEFFIELD • SOUTHEND
STEVENAGE



60% Travelled more than 30 min from out of town to attend the festival

87% Would **recommend** Love Light to friends or colleagues

91%



Support **winter tourism** in their local area

TOURISM IMPACT ON PERFORMANCE

ECONOMY



Winter tourism improves the local economy

95% AGREED

AVERAGE VISITOR SPEND



£17.18

Down £6.27 from 2020

£12.16

No children With children



£16.42

£7.14



£11.29



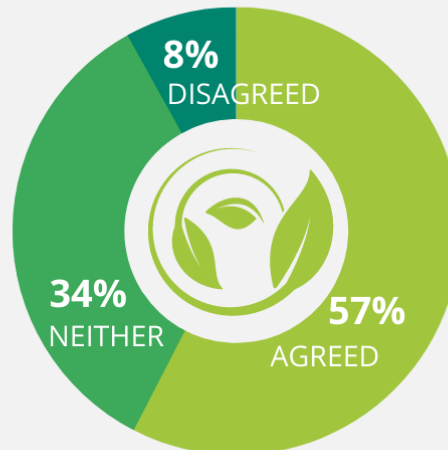
£16.42

■ Out of town ■ City

Data were analysed by EXPERIENCE and Vivid Interface Ltd.

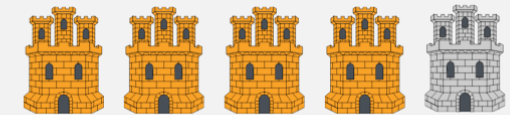
ENVIRONMENT

Winter tourism protects and enhances the natural environment



SOCIAL

90% AGREED



Winter tourism increases demand for local historical and cultural attractions

44%



had needs due to their life stage, physical or mental disability or restricted movement

76%

with a disability felt their visit could have been improved

**VIEWING PLATFORMS • LARGE FORMAT SIGNS
DISABLED TOILETS • SEATING AT INSTALLATIONS**



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FIRE ON THE WATER 2021: KEY OUTCOMES

Fire on the Water was a flaming display of installations, sculptures and projections on the Great Yarmouth Venetian Waterways. The event was organised by Out There Arts UK and Great Yarmouth Borough Council and sponsored by Visit Great Yarmouth and EXPERIENCE.

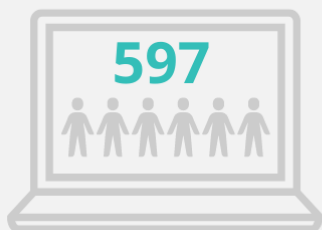


Credit: David Henry Thomas

38,000



Attendees



Respondents completed the online survey


Visitors came from all over England and Wales

BEDFORDSHIRE
BERKSHIRE • BIRMINGHAM
CAMRIDGE SHIRE
COUNTY DURHAM
DORSET • EAST SUSSEX
KENT • LEICESTERSHIRE
LONDON • NEWCASTLE
NOTTINGHAMSHIRE
OXFORDSHIRE
STAFFORDSHIRE • SUFFOLK
WEST YORKSHIRE

Visitors travelled on average **19 miles**

67% came from outside of Great Yarmouth

Quality of event 5/5 

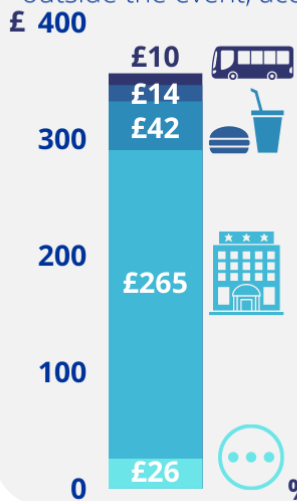
99% Visitor satisfaction 

97% Would likely recommend to friends, family or colleagues 

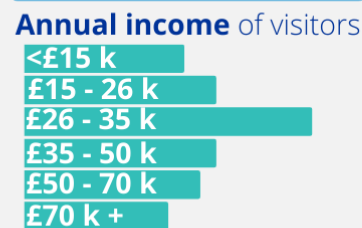
TOURISM IMPACT ON PERFORMANCE

ECONOMY

Average spend on travel in GY, food and drink at and outside the event, accommodation and other purchases

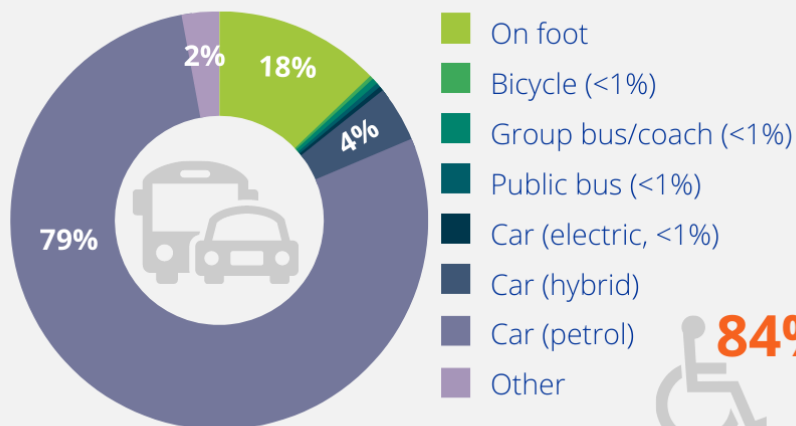


98% AGREED
£6 tickets for 6 people was good value for money



ENVIRONMENT

Same-day and overnight visitors used similar modes of transport to attend the event



Data were collected by Out There Arts and analysed by EXPERIENCE.

SOCIAL

Visitors attended with other people



84% Visitors with health conditions AGREED that the accessibility of the event met their needs

MORE TOILETS • SEATING • ACCESSIBLE COMMUNICATION



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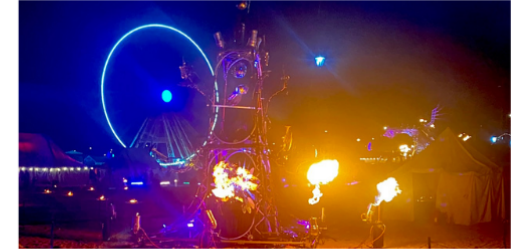
EXPERIENCE

European Regional Development Fund

 Norfolk County Council

FIRE ON THE WATER 2022: KEY OUTCOMES

Fire on the Water 2022 was an innovative, artistically excellent, accessible, COVID-19 safe, experiential trail of fire and light-based installations and performative interventions curated by Out There Arts and sponsored by the EXPERIENCE project. The main aim of the event was to increase visits to Great Yarmouth and an addition to the traditional tourism season.

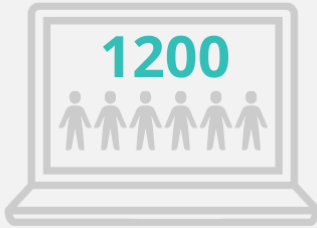


27,846



Attendees

1200



Respondents completed the online survey

58%



Agreed the Winter tourism **protects and enhances** the natural environment

Visitors travelled on average

24.5 miles

68%

came from outside of Great Yarmouth

82%

of visitors were happy with the **quality** of the event



TOURISM IMPACT ON PERFORMANCE

ECONOMY

ENVIRONMENT

SOCIAL

 **94%**
AGREED
Winter tourism improves the local economy

90% AGREED
tickets were good value using "pay-what-you-can" scale of £3, £6, £9 & £12

Visitor **modes of transport** to attend the event

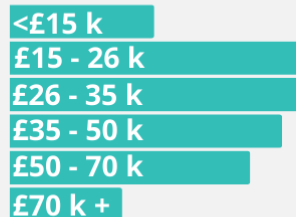
Main motivation for attending was to spend time with friends/family



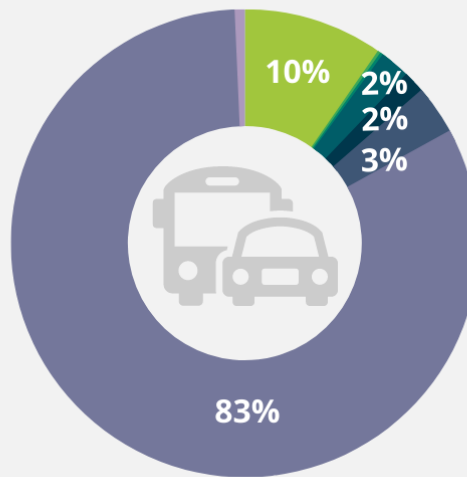
57%

Stayed in **paid accommodation**

Annual income of visitors



% 0 5 10 15 20



- On foot
- Bicycle (<1%)
- Group bus/coach (<1%)
- Public bus (<1%)
- Train
- Car (hybrid)
- Car (petrol)
- Other (<1%)

97%



Visitors attended with other people

83%



of people who identified as deaf or having a long-term health condition agreed the **event met their needs**, though many commented the **paths were too narrow** to allow for accessibility.

Data were collected by Out There Arts and analysed by EXPERIENCE.

For both FOTW events, about two thirds of visitors came from outside the Great Yarmouth area and travelled about 6 miles further to reach the event in 2022 than in 2021. Using the SASTDES Destination Carbon Footprint Tool, EXPERIENCE estimated that visitors attending the FOTW generated 25 tonnes of carbon emissions (CO2e) over the 16-day event in 2021, 41 g CO2e per person per day (**SEE: NORFOLK VISITOR CARBON FOOTPRINT**). Visitors attending the event in 2022 generated 10 tonnes CO2e, 49 g CO2e per person per day in 2022. By comparison, visitors to Norfolk in 2017, before the start of the EXPERIENCE project, on average costed 128 g CO2e per person per day. In 2019 this reduced to 120 g CO2e per person per day. Therefore, visitors to the FOTW events have a smaller carbon footprint than the average visitor to Norfolk.

Based on the average Norfolk visit value in 2021 and 2022, EXPERIENCE estimates the FOTW 2021 value at £2.8M (€3.2M, 182, 51 FTE jobs) and the FOTW 2022 value at £1.8M (€2.1, 34 FTE jobs) in local spend, a great boost to the local off-season visitor economy.

- ✓ Liaising with local stakeholders in early stages of the project helped to identify opportunities where EXPERIENCE could add value to off-season events, ensuring there is a longer-term legacy beyond the end of the project.
- ✓ NCC could have benefitted from better/more flexible options for working with arts and culture partners. A delegated grants programme, for example, might have been a more appropriate model for working with local arts partners to achieve shared objectives i.e., adding value to events that will be well-embedded in the local cultural landscape beyond the end of the project.

[Package and curate activities into themed itineraries \(T2.2.4\)](#)

NCC has 106 itineraries on the Be Norfolk website, with more currently in development. The appealing, experiential text showcases some of the highlights of a trip to Norfolk. Itineraries have been created across parallel themes with the activities ranging from 2 to 5 days and have been designed to include 2 to 5 activities.

Together with project partner Cycling UK, NCC has developed new cycling itineraries; three new circular loops starting from the Hoveton and Wroxham hub and 3 new routes starting from the Cromer Hub have been completed

and mapped. Each route varies in length offering broad options depending on ability and surface desired. Many of the routes also intersect with the new 232-mile long-distance route, *"The Rebellion Way"*, launched in October 2022, and bringing together different cycling routes. Routes passing near existing NCC activities offer opportunities to maximise the itineraries.

- ✓ It is essential to have your paid and free activities in place before trying to build itineraries. Experiential tourism is a mix of both and can contribute towards an inclusive offer by keeping costs low.
- ✓ Creating itineraries across a range of themes and locations will help to make them appealing for broad target audiences. NCC themes include, *"Food & Drink"*, *"History & Heritage"*, *"Outdoor Adventures"*, but we are also developing location specific itineraries to ensure there is something for everyone in Norfolk's offer.

[Exciting interpretation – bring assets to life for visitors \(T2.2.5\)](#)

Strong interpretation creates rapport between people and place and brings natural and cultural experiences to life for visitors. Text heavy panels can alienate some visitors and do little to enhance the visitor experience. During the EXPERIENCE project, NCC has delivered 10 exciting interpretations, including Great Yarmouth Podcasts, developed by *Originalprojects*, a digital book of Hindu Meditations and possibly (?) the world's National Park Information Centre in a restored public telephone box (**SEE: WPT2 Case Study 4**).

In partnership with Norfolk & Norwich Festival, the Norfolk Wonder Programme was designed to encourage people to explore Norfolk through a trio of activities in autumn 2021: 3 Walk Packs, created by artists to frame winter walks in Cromer, Great Yarmouth and King's Lynn; 3 Rider Spoke, a project by Blast Theory delivered in Great Yarmouth, King's Lynn and Sheringham inviting visitors to cycle and reflect on place; and Norfolk Open Studios (NOS). The latter event enhanced opportunities for visitors to get involved in art trails, demonstrations, and workshops and, with help from EXPERIENCE, was moved from peak to off-season in (September – October 2021, **SEE: WPT2 Case Study 5**).



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NORFOLK VISITOR CARBON FOOTPRINT

Average carbon emissions/visitor reduced by 7% between 2017 (before EXPERIENCE) and 2019. Transport accounts for most CO₂e, so attracting more domestic visitors to Norfolk in 2019 reduced CO₂e/person. The associated CO₂e for visitors attending FOTW2022 reduced by 61% from 2021 despite costing more CO₂e/person. The event duration was less than half than in 2021, but still attracted tens of thousands of guests. Visitors came from further away, using more cars, however more stayed in paid accommodation and engaged in local activities while visiting, striking a good balance between sustainability and stimulating local economy.

Norfolk visitors 2017

2.2 Million Tonnes CO₂e
over 365 days
46.7 M visitors

128 g CO₂e
per person
per day

120 g CO₂e
per person
per day

2.3 Million Tonnes CO₂e
over 365 days
51.8 M visitors

Norfolk visitors 2019

Data were collected by Destination Research Ltd, Norfolk Wonder and Out There Arts and analysed by EXPERIENCE using the SASTDES Destination Carbon Footprint Tool, from the Centre for Sustainability, Tourism and Transport (Breda University, NL).

Norfolk Open Studios 2021

26 Tonnes CO₂e
over 15 day event
20,791 visitors

83 g CO₂e
per person
per day

Fire On The Water 2021

41 g CO₂e
per person
per day

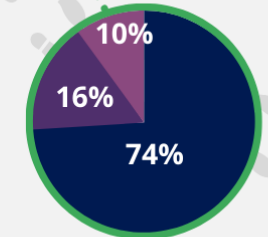
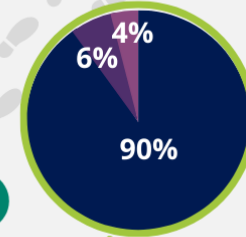
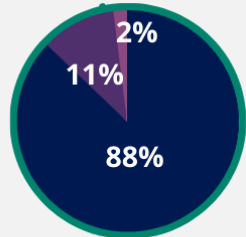
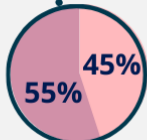
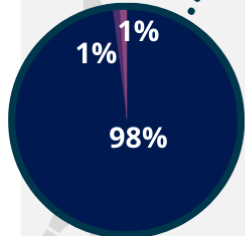
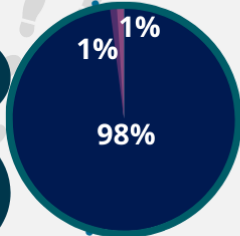
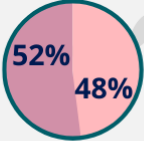
25 Tonnes CO₂e
over 16 day event
38,000 visitors

Fire On The Water 2022

10 Tonnes CO₂e
over 7 day event
27,846 visitors

49 g CO₂e
per person
per day

-61%



- Transport
- Accommodation
- Activities
- Domestic
- International

WPT2 Case Study 4: The Broads Authority Phone Box Tourist Information Centre

Repurposing local heritage assets to captivate and educate visitors.

Who we are

Rob Leigh, Head of communications for The Broads Authority, the organisation which looks after the Broads National Park, keeping it special for visitors and its community. The Broads is unique among the family of 15 National Parks in the UK. Stunning landscapes, rare wildlife and rich history are interwoven with over 125 miles of beautiful, navigable waterways. One of my responsibilities is to encourage people to explore the Broads and all that it has to offer.



What we did

We saved and restored an iconic 'K6' design red telephone box and converted it into the smallest National Park Information Centre in the world!



How we did it

The Authority manages a host of activities providing information which inspires people to visit and try new activities. This includes publications, websites, social media accounts, interpretation boards and events as well as running three Tourist Information Centres at Hoveton, How Hill and Ranworth. We are always looking for innovative new ways to inform, educate and inspire. So, when we heard about an old phone box in the beautiful village of Thurne, which was due to be decommissioned and removed we jumped at the opportunity to adopt it.

Supported by EXPERIENCE, we renovated the box back to its former glory with shiny new paint and the replacement of all 72 panes of glass. We then set

about designing a panel with visitor information about Thurne and the Broads National Park. We then installed an intriguing device which invites you to turn a handle to power an audio experience of birdsong, helping you to identify species commonly found in the area.

The project has preserved a piece of Thurne's history whilst providing information and inspiration for visitors without the need for additional signage structures in the countryside. It is available to use all year round with no running costs, other than an occasional clean or a lick of paint. The wind-up audio player can be updated with different content so in the future you may be able to hear stories from local people or other unique 'soundscapes' of the Broads. Because of the quirky nature of this story along with the bold claim of 'smallest TIC' we have attracted TV, radio, online and print media coverage further encouraging people to visit Thurne which also has benefits for local businesses in the village.



WPT2 Case Study 5: Norfolk Wonder – Norfolk Open Studios, Walk Packs and Rider Spoke

We worked with local events to foster a legacy of new experiential product creation.



Who we are

Norfolk County Council
EXPERIENCE Team.

What we did

We worked in partnership with the Norfolk & Norwich Festival, who co-ordinate the well-established Norfolk Open Studios (NOS)

event, to support them with shifting the 2021 event to the off-season and to kick-start an artist training & support programme to enhance the overall Open Studios offer.

Participating NOS artists were supported to pilot & develop new ideas for experiential hands-on workshops for visitors during the Open Studios event. This provided NOS with the groundwork to build & expand on this offer for the event in future years and gave artists the confidence to develop new experiential activities.

“Just wanted to say thank you again for the helpful meeting about running workshops; I had my first one today and it appeared to go really well. I had three participants and all produced lovely work despite limited experience with painting. I certainly took on some of the advice you shared and feel confident to go forward with other workshops.” Norfolk Open Studios '21 participating artist

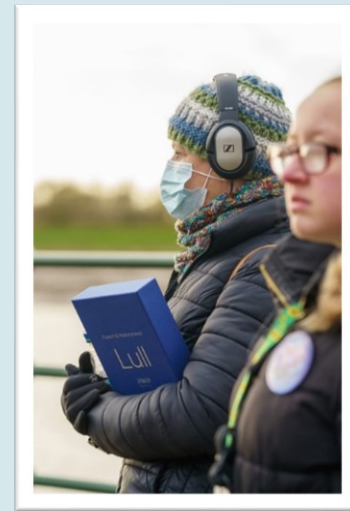
Despite taking place in the midst of the COVID-19 pandemic and during a national petrol shortage crisis, the 2021 Norfolk Open Studios event attracted over 18,700 visitors to Norfolk, with 77% of those taking part in the visitor survey citing the Open Studios event as their primary reason for visiting the county.

How we did it

We held early conversations with the Norfolk & Norwich Festival about how NOS could move to the off-season, grow their visitor numbers for the event, and how a focus on experiential offers could support this aim.

An EXPERIENCE Norfolk Open Studios Project Lead was appointed to pilot a range of ways to enhance the visitor experience of artists' open studios by helping artists to create trails, demonstrations, and hands-on workshops. Over 100 engagements with participating NOS artists were held via focused group sessions, training, and networking events.

Our Project Lead helped artists to identify what barriers were preventing them from developing experiential offers and provided key recommendations for NOS as to how they can continue to build on this strand in future years. This included implementing an artist mentoring scheme, providing training and development opportunities & resources, increased marketing for workshops & activities, and hosting networking events.



Top tips

Allow those who are new to experiential tourism the space to pilot new offers and try new approaches. Have conversations with local networks or organisations which are well-embedded in the local scene and see whether experiential tourism could add value to what they're doing.

EXPERIENCE worked with Norfolk Wonder to collect visitor information relating to travel, expenditure, and satisfaction with the event. 97% of the 142 survey respondents were satisfied with the event and the same proportion reported that the accessibility of the event met their requirements (**SEE: NORFOLK OPEN STUDIOS 2021 – KEY OUTCOMES**). Despite the petrol crisis and COVID-19, NOS attracted over 20,000 visitors, travelling an average of 30 miles to attend. Using the SASTDES Destination Carbon Footprint Tool, EXPERIENCE estimated that visitors attending the NOS in 2021 generated 26 tonnes CO₂e over the 15-day event, 83 g CO₂e per person per day (**SEE: NORFOLK VISITOR CARBON FOOTPRINT**). While more than half of visitors travelled by car to reach Norfolk for NOS, 80% of overnight visitors used non-motorised forms of transport to visit the artist studios, demonstrating a willingness to engage in more sustainable forms of travel for shorter journeys, substantially reducing their carbon emissions.

Based on the average Norfolk visit value in 2021, EXPERIENCE estimates the NOS2021 visitor value at £1.5M (€1.8M, equivalent to 28 FTE jobs) in local spend. Overall, the approach of moving this type of event to the off-season has been very successful in generating visitors to Norfolk. Given the event featured hundreds of artists based all over the region, visitors were spread across the county, reducing the load on honeypot areas. This strategy gives visitors the opportunity to visit new places and discover the hidden gems that Norfolk has to offer.

Norfolk Open Studios now takes place in the off-season, and NCC's support for a new strand of the programme (assisting participating artists with developing new experiential art trails and workshops) will be incorporated and amplified in the Open Studios programme each year, providing a brilliant draw for visitors.

[Closing last mile gaps in tourism services \(T2.2.6\)](#)

The Broads National Park outdoor visitor centre in Norwich, launched in March 2022, is an innovative installation in the heart of the city that will help to connect the Broads off-season offer with other regional offers, inspiring visitors to Norwich to venture further afield and experience all Norfolk has to offer.

We also worked with the Broads Authority to create a display in the arrivals lounge at Norwich Airport. This 15.5 m display showcases the Norfolk Broads experiences and incorporates QR codes and weblinks so people can quickly get more information as they pass through. With annual passenger numbers of around 500 K, this display in a high footfall area provides a unique opportunity to raise the profile of Norfolk as a destination, linking the city with our natural assets and perhaps encouraging business visitors to return in the off-season.

- ✓ Working in partnership with other local authorities enables pooling of resources and assets that can lead to more efficient and effective project delivery.



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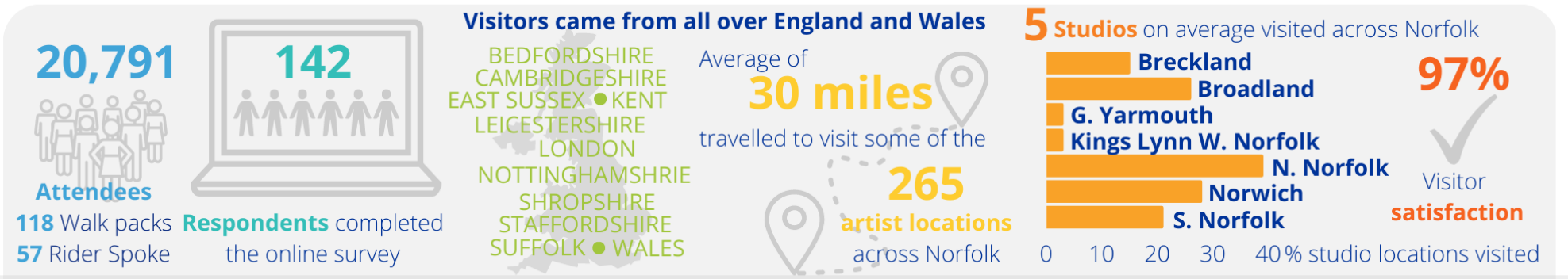
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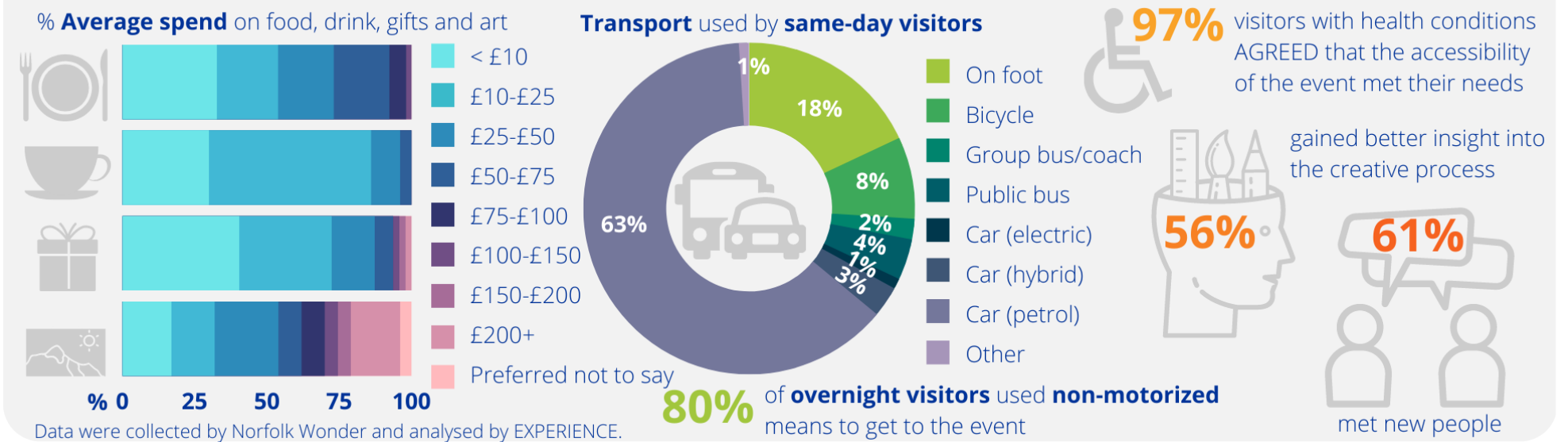
NORFOLK OPEN STUDIOS 2021 SURVEY: KEY OUTCOMES

The Norfolk Open Studios scheme gives hundreds of local artists and makers an opportunity to showcase and sell their works to residents across the county and beyond. Visitors get to see artists' workspaces, learn more about the artist's creative process and in many cases, try some of the methods themselves. Since moving the event to the tourism off-season in 2021, Norfolk Open Studios has been supported by the EXPERIENCE project, providing artists with a variety of workshops, including "Greening your business-A practical guide to sustainable tourism".



TOURISM IMPACT ON PERFORMANCE

ECONOMY ENVIRONMENT SOCIAL



3. Delivering off-season tourism infrastructure (WPT3)

EXPERIENCE Challenge 4 (C4): *“Infrastructure is not adapted for use October-March”.*

The approach to addressing C4 was to adapt and upgrade key tourism infrastructure and create access for October-March visitors combining functionality with iconic tourism landmarks. Itineraries created in WPT2 are supported by creation of new infrastructure (such as art trail) following findings of the WPT2 options analysis.

WPT3 Activities Summary

List of infrastructure investments (infrastructure improvements and new infrastructure introduced to attract more visitors during off-peak season):

- ❖ Bure Valley Path upgrade
- ❖ Norfolk Way Art Trail
- ❖ Halvergate Mills Trail
- ❖ Salhouse Dark Skies Platform
- ❖ Gorleston beach wheelchair hire kiosk
- ❖ Hunstanton Observatory
- ❖ Norwich Book Benches
- ❖ Great Yarmouth Eyeful Tower
- ❖ SCAP Mammoth Murals, Sheringham

WPT3 Outputs

Upgrade tourism infrastructure (T3.2.1)

Developing the Bure Valley Path (BVP) between Aylsham and Wroxham & Hoveton was a key delivery milestone for Norfolk, defining the path as a Gateway to The Broads and welcoming visitors to the largest protected wetland in the UK. The 9-mile path following the route of a miniature steam train was upgraded, making it more accessible and bringing the heritage railway alive to visitors. Resurfacing 4520 metres of the path was completed in July 2022. Placemaking infrastructure included the installation of heritage gates, gateway arches, new station signs and bespoke mile markers. New railway style heritage fencing has been installed as well as modular furniture including 3 access-friendly picnic benches. The upgraded BVP upgrade was launched in September 2022 (**SEE: BURE VALLEY PATH: INFRASTRUCTURE UPGRADE**). A schedule of planting is in progress to further enhance the route.

Very little was removed during the refurbishment and planting of New Zealand grass rosemary lavender, buddleia, heather, holly, trailing plants and 750 m² of wildflowers has resulted in a biodiversity net gain. Taken together, the pathway renovations support NCC’s long-term Environmental Policy goals of *Using and Managing Land Sustainably* and *Connecting People with the Environment to Improve Health and Wellbeing* (**SEE: WPT3 Case Study 1**).

The NCC EXPERIENCE team surveyed eight businesses situated near the Bure Valley path to collect their opinions and perceptions on the economic impact the works have had, or anticipate having, on their business, in terms of off-season visitor number and spend (**SEE: BURE VALLEY PATH BUSINESS IMPACT SURVEY I**). Responses from the survey of businesses along the Bure Valley Path showed that 88% of responders were aware of the upgrade and 75% felt that the upgrade would have a positive effect on their business with 13% not knowing, many feeling it was too early to tell. There has been a mixed-response as to the impact COVID-19 had on businesses with 25% saying the pandemic had been good for business and 38% saying that it had been bad (**SEE: BURE VALLEY PATH BUSINESS IMPACT SURVEY II**). Almost two thirds of businesses have recovered to pre-pandemic levels. The evolving situation regarding the cost of living in the UK may already be having an impact on businesses with 50% saying the effects have been bad to very bad and the remaining 50% neutral. Some businesses may have not seen the impact yet but are expecting to feel the negative effects in the future. A substantial majority of businesses feel that green infrastructure and sustainable tourism are worthwhile areas for investment, with 75% feeling that the BVP upgrade will have a positive effect on their business (**SEE: BURE VALLEY PATH BUSINESS IMPACT SURVEY III**). Some companies directly depend on the path for business and the resurfacing has already yielded noticeable results. Users of the path will benefit during poor weather conditions typical to the winter months, hopefully leading to local economic growth whilst improving visitor access and interaction with nature.

As part of the Norfolk Residents Survey (described in more detail in **WPT5**), over 2000 Norfolk residents shared their opinions on the BVP project. The BVP attracted residents from across the county and not just from the immediate vicinity of the path (**SEE: BURE VALLEY PATH – SURVEY RESPONSES**).



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BURE VALLEY PATH: INFRASTRUCTURE UPGRADE

EXPERIENCE upgraded infrastructure along the Bure Valley Path, a walking and cycling path in Broadland between Wroxham & Hoveton and Aylsham. The upgraded path was officially launched in September 2022 to showcase the developed route and heritage features that brings the path to life and delivers high-quality access for individuals who experience physical, sensory and/or cognitive impairments.



"Will probably advertise it and I like the mile markers."



"As the upgrade isn't fully complete it is still early to tell if it could improve business in the future, increased marketing around the upgrade in the future could help."



"Overall really happy with the improvements and love the sculptures to make the route more interesting for walkers and cyclists."



WPT3 Case Study 1: Bure Valley Path Upgrade

Green infrastructure to encourage sustainable travel, provide all abilities access to nature, amenities and jobs and links businesses with customers.

Who we are

Dr Katy Owen, Protected Landscapes Manager, Norfolk County Council. We work to enhance the outstanding natural environment of Norfolk, safeguarding the societal value of our distinctive landscapes, species, and cultural heritage for future generations by making sure these benefits are recognised and integrated into decision-making.



What we did

As outlined in our current six-year business plan, "Together for Norfolk", we effect an approach to Norfolk's economic development that is socially inclusive, innovative, and sustainable. In doing so, we continue to ensure that the distinctive Norfolk environment is cared for and explore new ways to make our countryside as accessible as possible, whilst respecting the sensitivities around certain natural landscapes and sites. The EXPERIENCE refurbishment of the Bure Valley Path (managed by NCC on behalf of Broadland District Council) delivers improved accessibility to The Broads and encourages sustainable forms of travel for residents and tourists alike, contributing to Norfolk County Council's plans to cut carbon emissions and support nature recovery.

"These improvements will entice more visitors to The Broads and showcase the railway heritage of the Bure Valley Railway. Developing new experiences draws in visitors all year round and extending choices for attractive nature walks or cycling can help avoid the overcrowding at some of the more popular tourism spots at busy times of the year. This type of sustainable tourist offer, for both local people and visitors to our lovely county, will help to support Norfolk businesses and contribute to our ambitious target of becoming carbon neutral as an authority by 2030."

Councillor Lana Hemsall, NCC Member Champion for Sustainable Transport

How we did it

The team has extensive knowledge of the route and worked closely with EXPERIENCE to ensure funds were used in areas that would provide most benefit to the public and local businesses. We worked in collaboration with local organisations and businesses to widen and resurface the path, add railway heritage features, and introduce planting to support habitat creation to promote environmental net gain within Norfolk's natural capital assets.



The refurbishment delivers on many of Norfolk's Environmental Policy key goals advocating sustainable travel and connecting people with the environment to improve health and wellbeing, as well as supporting the Norfolk Strategic Infrastructure Delivery Plan to link people to jobs, homes, local amenities and connect business with customers.

"The pandemic has shown us how important it is for us all to spend time in the fresh air. This project will open up a new gateway to The Broads National Park and the improvements will deliver better entry and exit points for individuals that have access needs. There will be five circular path routes for people to enjoy, with directional signage and heritage information about the Bure Valley."

Councillor Jo Coplestone, Broadland District Council, Portfolio Holder for Economic Development

"This is another fantastic project the Greater Norwich Growth Board (GNGB) is helping to fund, which will benefit residents, businesses, and visitors to the area. These improvements will create an attractive offer to cyclists, both in Greater Norwich and those visiting from further afield."

Councillor Alan Waters, Leader of Norwich City Council



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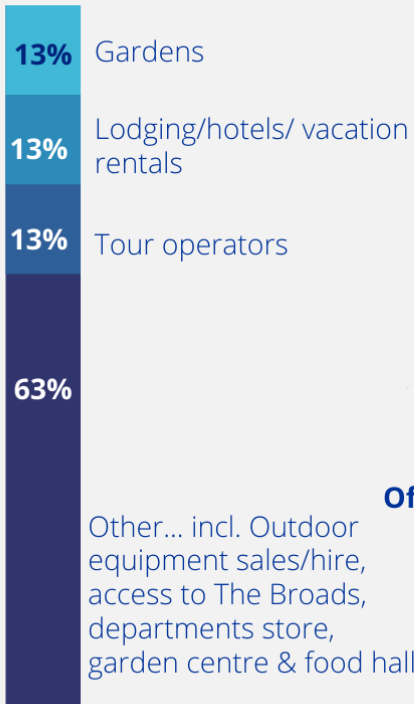
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BURE VALLEY PATH BUSINESS IMPACT SURVEY I IMPACT ON ECONOMIC PERFORMANCE

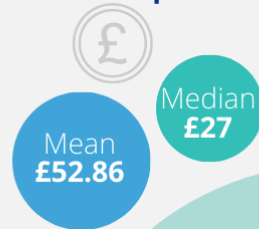
Businesses near the Bure Valley Path were asked about economic impacts of the development on their trade. As of Winter 2023, two thirds of businesses had recovered to pre-pandemic levels of performance. Around one third of businesses open only during peak season, revealing scope for off-season development, potentially in partnership with other EXPERIENCE-supported businesses.



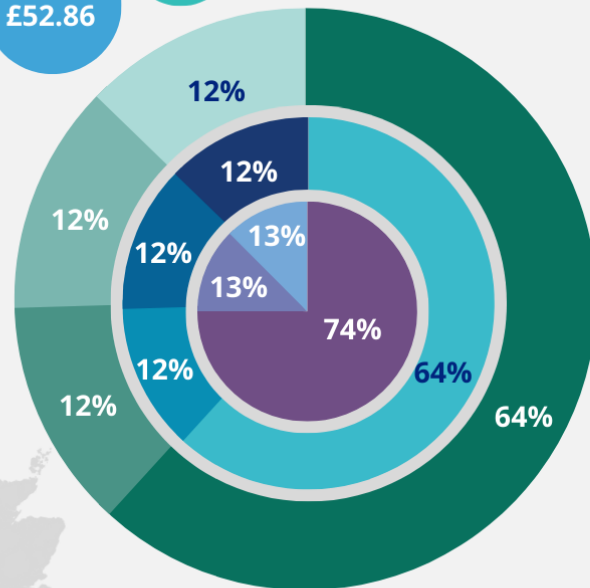
BVP businesses surveyed in
Autumn 2022 - Winter 2023



Av. customer spend



How does your business normally operate?



COVID-19 impact recovery

- We have recovered to pre-pandemic level
- We perform better than pre-pandemic level
- We have partially recovered to pre-pandemic level
- We may never fully recover from COVID-19

No. visitors before COVID-19 (per year)

- < 20,000
- 20,001 - 50,000
- 100,001 - 150,000
- > 200,000

Average No. visitors in the off-season

- < 100
- 1001 - 1,500
- > 10,000

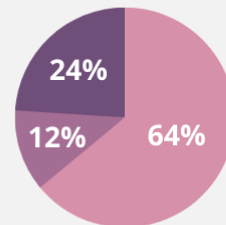
Seasonal opening



88% of trade comes from **direct visits** rather than passing footfall

Off-season visitors coming from...

...rest of GB, 38%
...Norfolk (not local), 62%



Perceived usage of the Bure Valley Path

- < 50% of visitors
- > 50% of visitors
- Don't Know

Data were collected and analysed by EXPERIENCE.



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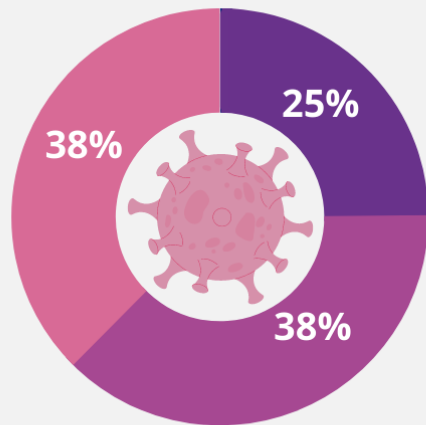
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European Regional Development Fund

 Norfolk County Council

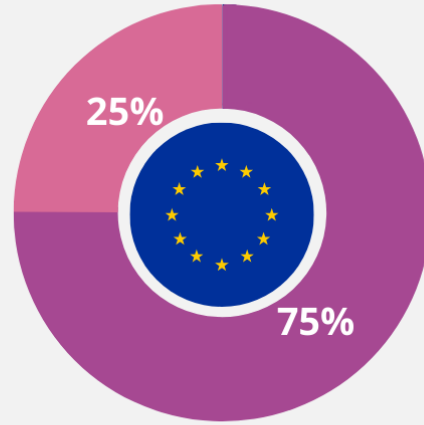
BURE VALLEY PATH BUSINESS IMPACT SURVEY II EXTERNAL INFLUENCES ON ECONOMIC PERFORMANCE

Most businesses surveyed near the Bure Valley Path were aware of the path upgrade and were very optimistic about the positive impacts the work might have on their business performance in the future. An overwhelming majority believe that green infrastructure projects, such as the BVP project, are a good use of public funds and that improvements to sustainable forms of tourism will help grow their business.

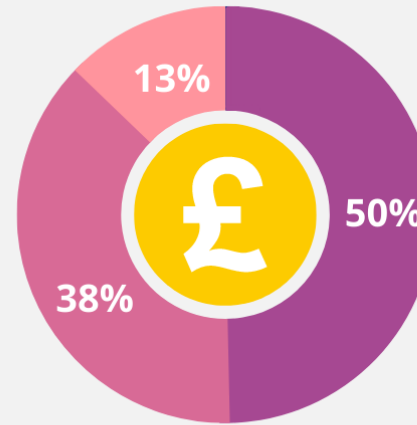
COVID-19



Brexit



Cost of living



100% of businesses expect **no change in performance** during Autumn 2022/ Winter 2023

- Very good
- Good
- Neutral
- Bad
- Very bad

"Still too early to say if cost of living will have an effect but currently neutral."

"Negative effect since Covid is largely due to increase in competition. Also, the cost of living crisis has not currently made a difference but can imagine a negative effect in the future."

"The largest impact we see is the living crisis and projects like the Bure Valley pathway may assist in riding out the storm, until the economy picks up again."



Data were collected and analysed by EXPERIENCE.



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BURE VALLEY PATH BUSINESS IMPACT SURVEY III SUPPORT FOR GREEN INFRASTRUCTURE INVESTMENT

Most businesses surveyed near the Bure Valley Path were aware of the path upgrade and were very optimistic about the positive impacts the work might have on their business performance in the future. An overwhelming majority believe that green infrastructure projects, such as the BVP project, are a good use of public funds and that improvements to sustainable forms of tourism will help grow their business.

88% of businesses were **aware** of the Bure Valley Path upgrade

75% of businesses feel that the upgrade to the Bure Valley Path will **positively affect their business**

"Already seen the difference in mud reduction, improving the use in winter. Before it was impassable."

"Cycling doesn't form a core part of the business."

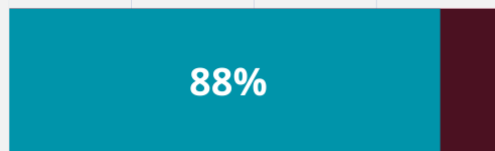
"We are too far walking wise to the path and I don't think this will encourage people to walk to our business."

"One of our trips uses the Bure Valley Footpath. Customers walk from Wroxham to Buxton along the path and paddle back down again. Having a better path will increase the attraction of the trip and resurfacing will help with issues in adverse weather."

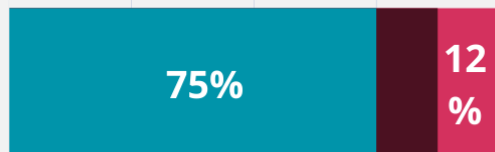
"Couldn't say how the BVP will positively effect the business but any improvement to encourage more visitors to the surrounding area and improve local services is bound to improve the business."



Do you feel that the improvement to the Bure Valley Path will **increase footfall** through passing trade?



Do you think that investment in green infrastructure projects, such as the BVP project, are a good **use of public funds**?



Do you think that improvements to sustainable forms of tourism will help **grow your business**?

■ Yes ■ Don't know ■ No

Data were collected and analysed by EXPERIENCE.



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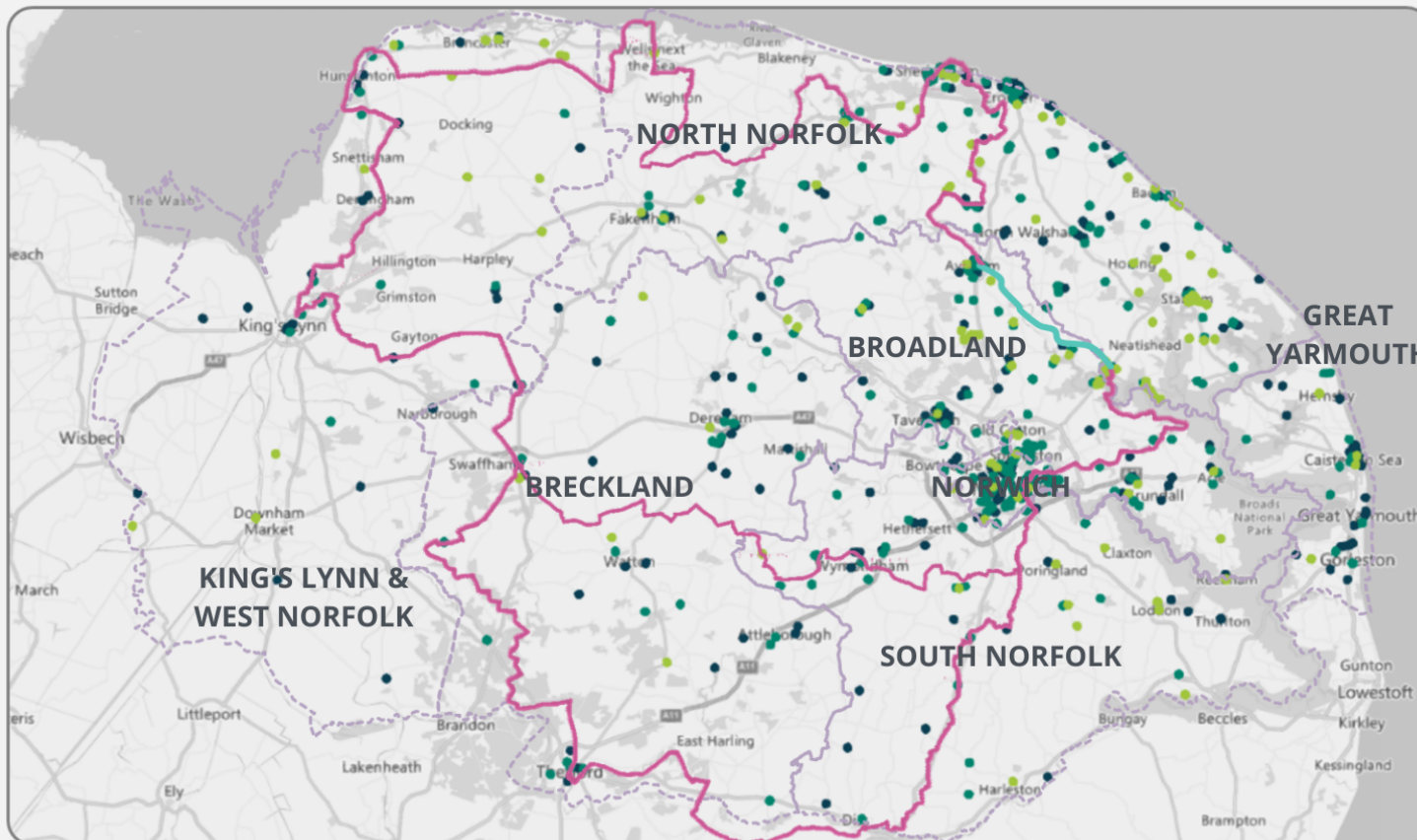
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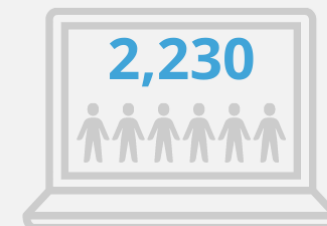
BURE VALLEY PATH SURVEY: SURVEY RESPONSES

The 9-mile Bure Valley Path forms part of *The Rebellion Way*, a 232-mile cycling route around Norfolk, that provides residents and visitors the opportunity to discover more of the region by bike. The path upgrade delivers improved accessibility to The Broads and encourages sustainable travel that connects people with nature, jobs and businesses. The work supports Norfolk County Council's plans to cut carbon emissions and support nature recovery through green infrastructure strategies. The map illustrates the distribution of Norfolk Residents Survey respondents from winter 2022 - 2023 who have visited the Bure Valley Path.

SURVEY RESPONDENTS WHO HAVE VISITED THE BURE VALLEY PATH



- Winter survey WAVE 4
- Summer survey WAVE 5
- Winter survey WAVE 6
- Norfolk district boundaries
- Bure Valley Path
- The Rebellion Way* cycle route



Residents that have **responded** to BVP-related survey questions

Data were collected and analysed by EXPERIENCE.

Residents were incredibly favourable about the works with 86% saying that this type of infrastructure upgrade is a good use of public funds and 81% would be encouraged to engage more in sustainable activities if a similar project were to happen in their local area (**SEE: BURE VALLEY PATH SURVEY OUTCOMES: SUPPORT FOR SUSTAINABLE TOURISM**). Almost 9 out of 10 people agreed that sustainable forms of tourism should be supported. To collect additional data about the volume of visitors using the Bure Valley Path and whether there were seasonal differences in the patterns of usage of the path, we installed eight bespoke people counters positioned along the route.

Unfortunately, due to unforeseen technical issues, the people counters only captured data from one off-season (autumn 2021 – winter 2022), logging 54,758 path users from October 2021 up to and including March 2022. There was insufficient data from an adjacent peak season to garner any meaningful seasonal comparisons. Nevertheless, the numbers of people using the path recorded go some way in contributing to the off-season visitor pool in the Norfolk region during the EXPERIENCE project lifetime. We combined the information gathered from the people counters with off-season visitor numbers to the businesses near the BVP who responded to our survey to get an estimate of path users spending. An estimated of 11,550 visits to businesses occur in the off-season, around 20% of 54,758 people logged by the counters. Based on the average Norfolk visit value in 2021, NCC estimates the BVP generated £3.7M (€4.4M, equivalent to 69 FTE jobs) in local spend. Businesses surveyed by EXPERIENCE have a very positive outlook on the impact the BVP upgrade will have on their trade and the refurbishment can only improve customer-to-businesses connections in the years to come.

- ✓ Upgrade of the BVP was an innovative arrangement with a partner council to collaborate on infrastructure enhancements for broader benefit and could serve as a model for future initiatives.
- ✓ Opportunity to use infrastructure improvements to simultaneously improve biodiversity also provides a template for future similar schemes.
- ✓ Cascade funding through the local economy by diversifying structural enhancements to include creative interventions that utilise local skills and materials and businesses.

- ✓ Prompt commissioning of experts sets solid foundations for works, in this case, in house-expertise, ecology, arboriculture, highways surveying, bridge engineering.
- ✓ Be mindful of possible obstacles relating to deadlines and logistics of conducting constructions works through the winter.
- ✓ It is important to understand the market when setting the budget; factors like fluctuating cost of materials can lead to commissioned works going over budget.

Innovation incubator – place making tourism infrastructure (T3.2.2)

The Innovation Incubator is an exciting strand of the EXPERIENCE project designed to create iconic and placemaking tourism infrastructure to increase visitor numbers in Norfolk during the off-season. The Innovation Incubator primarily facilitates the installation of an ambitious, high quality outdoor art and sculpture trail making use of the existing network of long-distance walking trails and footpaths, which spans across Norfolk (**SEE: NORFOLK PLACEMAKING INFRASTRUCTURE**). The Norfolk Way Art Trail (NWAT) has focused on accessibility for people with physical, hearing, visual and/or cognitive disabilities in not only the final artwork design but also the artist commissioning process (**SEE: WPT3 Case Study 2**) and public engagement activities (**SEE: WPT3 Case Study 3**).

The Innovation Incubator projects also focus on sustainability, creative interpretations of natural and cultural assets including capitalising on Norfolk's dark skies by building two dark skies focused structures. The NWAT encourages active, sustainable modes of travel such as walking and cycling.

Salhouse Broad Dark Skies Discovery Hub provides a place for stargazing activities, as well as a place to learn more about the Broads and was delivered in collaboration with the District Authority, Love the Broads, who will maintain the hub and Salhouse Broad which is privately owned but open to the public. The project included ecological interventions to offset the building, including 10 Sea Buckthorn plants and 20 trees. Ecological measures also included the erection of 2 bird boxes in the adjacent woodland. Shrubbery such as Buckthorn is important in creating a habitat for smaller mammals, nesting sites for birds and food for several species of butterfly, as well as reducing the visibility of the structure from the water. Ten red light torches were supplied so that visitors to evening dark skies events could move safely while not causing light pollution and reducing disturbance to wildlife.



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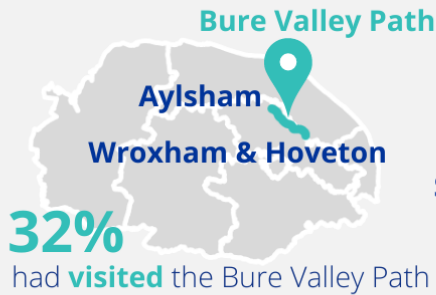
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BURE VALLEY PATH SURVEY OUTCOMES: SUPPORT FOR SUSTAINABLE TOURISM

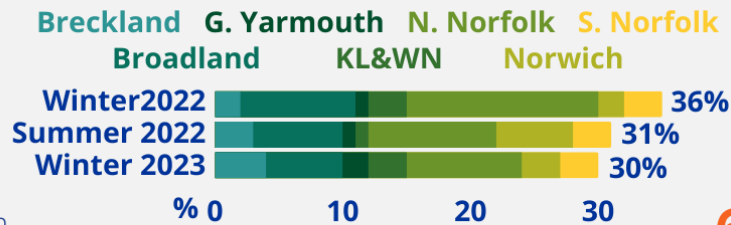
Norfolk Residents Survey respondents were shown pictures of the Bure Valley Path upgrade and asked for their opinions on the development and sustainable tourism. Responses averaged across WAVES 4 - 6 reveal strong support for public fund investment in green infrastructure projects and for encouraging sustainable forms of tourism. 8 out of 10 respondents would themselves be encouraged to walk, run or cycle more if similar upgrades were to happen in their area.



Norfolk residents
surveyed in Winter -
Winter 2023



Districts of respondents who have visited the BVP



68% more likely to visit BVP
having seen **pictures**

TOURISM IMPACT ON PERFORMANCE

ECONOMY

86% AGREED



Investment in green infrastructure projects, such as the BVP project, are a good use of public funds.

88% AGREED



Sustainable forms of tourism should be more encouraged in their local area.

81% AGREED



A project such as this on a trail or path in their local area would encourage them to engage more often in sustainable activity such as walking, cycling and running.

Data were collected and analysed by EXPERIENCE.



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NORFOLK PLACEMAKING TOURISM INFRASTRUCTURE

Capitalising on Norfolk's unique natural and cultural assets EXPERIENCE delivered new placemaking tourism infrastructure and facilities to support wider accessibility and inclusivity. This included The Norfolk Way Art Trail (NWAT), an exciting new public art trail around Norfolk. The NWAT features multi-sensory, accessible public artworks that will engage local communities, reveal hidden stories, and inspire visitors to explore the county between October and March. The map illustrates the new infrastructure locations, with What3words/// positions indicated.



- 1 Halvergate Mills Trail:** [///flaking.functions.stared](#)
- NORFOLK WAY ART TRAIL**
- 2 Honing Passage (Honing Station):** [///pythons.audio.cafe](#)
- 3 Flock (Diss Mere):** [///birthdays.expert.litters](#)
- 4 Iron Reef (Reedham Ferry Inn):** [///whizzed.holds.capillary](#)
- 5 Flint (Norwich Arts Centre):** [///zest.bonds.lonely](#)

- 6 Hunstanton Observatory:** [///functions.dogs.geologist](#)
- 7 Salhouse Broad Dark Skies Discovery Hub:** [///committed.scoring.soonest](#)
- 8 Mammoth Murals:** [///stealing.vies.ecologist](#)
- 9 Eyeful Tower:** [///angel.wounds.common](#)
- 10 Gorleston Beach Wheelchair Kiosk & All Access Tennis Tables:** [///fulfilled.guides.dozens](#)
- 11 CITY OF STORIES BOOK BENCHES**
- Upper St Giles:** [///flat.resist.river](#)
- Gentleman's Walk:** [///never.ramp.legend](#)
- Rampant Horse Street:** [///mash.forget.zone](#)
- All Saints Green:** [///exchanges.bright.early](#)
- King Street / St Julians Centre:** [///flops.chill.blog](#)
- Riverside Walk:** [///bleak.native.labels](#)
- St George's Street:** [///invite.stack.twig](#)
- St Martin at Palace Plain:** [///owner.jazzy.saves](#)



WPT3 Case Study 2: Norfolk Way Art Trail procurement

We worked closely with our procurement team and specialist advisors to run a successful and inclusive commissioning call to artists.

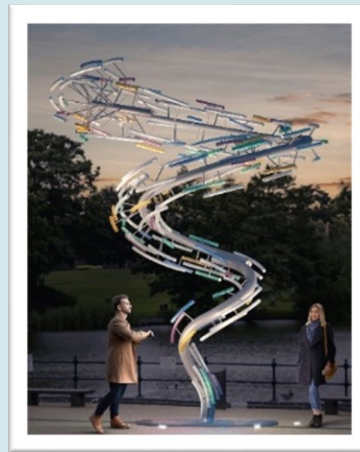
Who we are

Norfolk County Council EXPERIENCE Project Team.

What we did

We commissioned a series of permanent, outdoor public artworks to create a new contemporary art trail to span across Norfolk's existing network of long-distance walking trails. We wanted artworks to be placemaking, inclusive, accessible, and of high-quality. Attracting a wide range of artists to respond to our call for commissions was therefore key.

Public commissioning processes are not always the simplest to navigate and can be intimidating for artists with no experience of responding to public tenders. It was important for us not to take a 'business as usual' approach and to explore ways to adapt the tendering process to encourage wider interest and bolster artist confidence to apply. These efforts were hugely successful, attracting 225 submissions, including applications from international artists based in China, Denmark, Netherlands, USA, Spain, Germany, Costa Rica, Thailand, Germany and Lebanon.



NWAT Concept design - "Flock" by ToyStudio (Toby Plunkett) for Diss Mere.

"I just wanted to say I really liked the way the invitation to apply for the project was presented and communicated. It was all refreshingly clear and stylishly done, so thank you for that too." Feedback from an artist who responded to our open call

How we did it

We took advice from Creative Giants, an artist led creative agency, and ran a series of focus groups with emerging, diverse, and disabled artists. From these focus groups we gained an understanding of what barriers can exist for artists within public tendering processes, and we spent time working closely with

procurement colleagues to find ways to address these barriers and explore where and how the tendering process could be adapted.

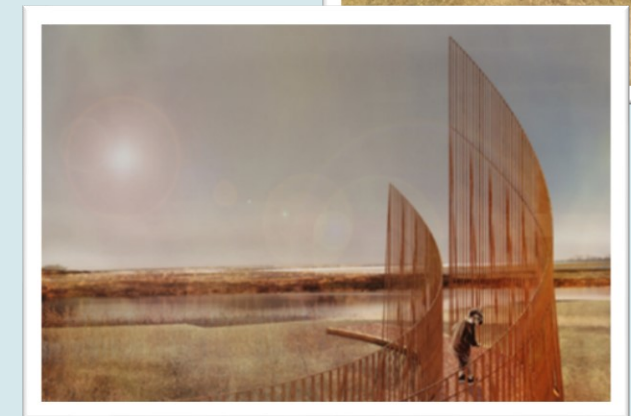
For example, we learned from our focus groups that for those artists with dyslexia, spoken word & visuals are often an easier format. Providing a commissioning brief in audio format to break down the process step by step would allow people to go back and re-listen to any elements. We commissioned full audio recordings of the commissioning brief along with instructions and provided this as part of our Invitation to Tender pack.

We also reviewed NCC tender application forms and simplified these as much as possible, working closely with procurement to ensure the forms were clear, did not contain any unnecessary jargon, and focused on the strength of the creative idea.

Top tips

Build in plenty of time to work with your procurement teams to find the best approach; it took us around two months to agree the process and get everything prepared. Consider who you would like your artist call-out to reach, and how you can minimise barriers at each stage of the process.

Top: NWAT Concept design - "Honing Passage" by Studio Sabine (Sabine Marcellis & Guillaume Morillon) for Honing Station, near the Dilham Canal. Bottom: NWAT Concept design - "Iron Reef" by design studio Maetherea (Cristina Morbi & Aurora Destro) for Reedham Ferry Inn.



WPT3 Case Study 3: Community Engagement for Flock at Diss Mere

Poem created by a local writer based on the stories, voices, opinions, and thoughts of Diss residents.

Who we are

Belona Greenwood, Local Writer.

What we did

We gathered stories, voices, opinions, and thoughts of Diss residents in the summer of 2022 to create a poem which will then be engraved onto the artwork 'Flock' at Diss Mere.



How we did it

We organised a series of creative workshops and conversations with the community and Diss High School. I attended a fortnightly session of Just A Cuppa, hosted by Diss Library, where people who live alone in the community can come together. We talked and the participants wrote for short periods. Participants engaged so well they responded via email with further recollections and thoughts about the town.



I also visited the Cornhall and Diss Dementia group where I moved between groups of attendees and held creative conversations, recording their responses. The group was very interested and enthusiastic about recording their thoughts, opinions and sometimes, prejudices. It stimulated discussion about the town, its values and history.

I was also able to work with 20 Year 9 and 10 students at Diss High School. We were able to creatively explore the young people's thoughts, ideas, and experience of the town. They wrote snapshots of being in the town which



illustrated a real love and awareness of Diss, and in particular the mere. These are just three of the many workshops I organised around the town.

The response of people taking part in all of the groups was overwhelmingly positive about Diss. It was seen as a warm, welcoming place, tolerant and kind.

I then took these stories, voices, opinions, and thoughts and created a poem to reflect the residents of Diss and what the town means to them.

I hope that these workshops and conversations have allowed the residents of Diss to feel involved in the creation of this poem and, subsequently, the artwork that will be installed with their views and stories engraved on it.

Top tips

Research and a readiness to listen.



NWAT Concept design – "Flock" by ToyStudio (Toby Plunkett) for Diss Mere.

- ✓ Getting expertise on board from the beginning is invaluable. For us, the Art Trail was an ambitious project and commissioning an artist-led creative agency to project manage delivery was the right decision as they brought much needed expertise and experience that we didn't have within the team.
- ✓ Think about local experts and groups who can work with you to help implement infrastructure projects. For example, the King's Lynn and District Astronomy Society brought valuable expertise to support development of the Dark-Skies infrastructure.
- ✓ It can be useful to do some outreach and engagement for complex and ambitious infrastructure projects before launching the procurement. We found surveys and focus groups with local communities/underrepresented artists were incredibly helpful in shaping the Art Trail open call process and artist briefs.
- ✓ Begin procurement conversations as early as possible - especially if you want to try and do something that's new to your organisation. For us, the conversations started around a desire to employ a procurement process for the art trail selection of artworks/artists which was fit for purpose and well suited to arts and cultural commissioning. Early discussion with the procurement team helped us shape something that met all these requirements and led to a fantastic response from artists.
- ✓ Ample time should be allocated to prepare for community and stakeholder engagement for new infrastructure ideas as this process can be very involved and protracted. However, the more engagement and scoping that can be completed in advance of a tender, the better.

4. Delivering experiential tourism marketing & distribution (WPT4)

EXPERIENCE Challenge 5 (C5): *“FCE region is not known for experiential tourism: assets are underdeveloped and poorly promoted.”*

The approach to tackle C5 used cutting-edge techniques to concept-test itineraries on consumers and travel industry before release. Tourism offer was promoted via innovative campaigns and an interactive trip-planning platform, allowing visitors to build their ideal holiday.

WPT4 Activities Summary

List of products and marketing materials:

- ❖ Be Norfolk trip planning platform
- ❖ Targeted photography
- ❖ Every Move platform

WPT4 Outputs

Market testing with trade and distribution channels (T4.2.1)

Peer-to-peer networking events (**T1.3.3**) around Norfolk gave NCC the opportunity to engage with a range of tourism businesses and conduct Business to Business (B2B) testing at 4 networking events. The participating businesses found the feedback, tips and advice received by fellow businesses and other tourism players very valuable.

To further support development of our marketing strategy, EXPERIENCE commissioned the University of Northampton to produce the Norfolk Ethnic Domestic Tourism Market Report (April 2022) with a view to aid EXPERIENCE in attracting new ethnic minority visitors to Norfolk out of season. The report, sheds light on the travel motivations and preferences of domestic diverse ethnic groups, their perceptions of the tourism experience and levels of participation in the domestic tourism market.

Figures from the 2011 UK Census show that 14.1% of the UK population is ethnically diverse, predicted to rise to 29.9% by 2031 and 39.2% by 2051. Currently, just 0.1% of ethnic communities in the UK participate in domestic tourism. Participants in the Norfolk Ethnic Domestic Tourism Market research reported systemic barriers to visiting local attractions and destinations, such

as the risk of racism and a lack of inclusivity (**SEE: ETHNIC MINORITY TRAVEL BEHAVIOURS**). Useful insights into the preferences of these audiences include:

- Ethnic travellers share similar motivational push factors for leisure and holiday experiences as the white British population.
- Ethnic travellers prefer to travel in groups to locations and accommodation facilities that they consider to be safe from negative racialised encounters.
- Ethnic travellers are more likely to book destinations and holiday experiences where they are represented in the marketing communications.
- Ethnic travellers are likely to visit destinations where they have friends and family.
- Marginality does not account for lower participation in domestic tourism for all categories of ethnic minorities.
- Racism is cited as the single most dominant barrier to domestic travel.

Wintry weather, poor value for money and overall lack of provision of suitable food, amenities and accommodation were also contributors. Ethnic minority tourists are more likely to visit large cities/towns and seaside resorts rather than smaller towns and countryside villages. The research suggested that while Norfolk has some great seaside resorts, ethnic tourists choosing a coastal holiday are unlikely to visit during the off-season. It also showed that the East of England is among the lowest destination areas visited by ethnic minority holidaymakers. One reason for this is that Norfolk is seen as not very easy to get to and poor public transport links in the county make it hard to travel around the county, particularly to more rural areas.

The research provided insight into ethnic minority travel behaviours within the context of project target groups and attracting more off-season domestic tourism. These insights will be invaluable moving forward as we continue to fine tune our approach to activity development and promotion. Some of the report's key recommendations include targeting these groups for all year-round visits rather than only for off-peak season, targeting urban areas with large ethnic populations rather than neighbouring counties, and development of community-based tourism product involving local, grassroot groups.

The full report is available on the EXPERIENCE website Resources Hub.



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ETHNIC MINORITY TRAVEL BEHAVIOURS

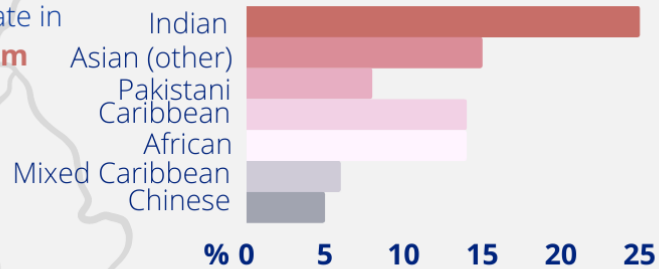
Although 18% of people in the UK belong to Ethnic Minority groups, they only represent 0.1% of people who participate in domestic tourism. Research has shown that Ethnic Minority groups are under targeted and under represented when it comes to marketing in tourism and private leisure sectors. They are less likely to visit small towns and countryside villages compared to White British people and more likely to go to places where they can spend time with family and friends and/or go away in large groups.

0.1%

Ethnic minority groups
in the UK participate in
Domestic Tourism



Representation of Ethnic Minority Domestic Tourists in the UK



In **Norfolk**, Ethnic Minority Groups only represent **15% of the population**



33%

of total **earnings** in
Britain for **Domestic
Tourism** is from Ethnic
Minority Groups



\$9 Billion

spent on domestic and
international **leisure travel**
in the UK by **Black** travellers



Limited targeting and **lack of representation** of
people from Ethnic Minority Groups in marketing
communications is associated with a **lack of inclusivity**

**Avoiding unfamiliar
places seen as "off-limits"**

**Sharing stories of
discrimination**

**Visiting family
and friends**

**Travelling in
large groups**

**Risk of
Racism**

For many people from Ethnic Minority Groups, the risk of racism was a large factor in choosing where to go away.

As a result, they are **less likely** to visit **small towns and countryside villages**, instead preferring to visit **seaside towns, cities and large towns**.

Data and analyses were provided by University of Northampton

- ✓ Work in partnership with other local groups and organisations that can help widen the reach of e-surveys, etc by disseminating to their own networks.
- ✓ It was important that tourism providers followed a “locals first” approach, stimulating visitor spend to benefit local suppliers and producers, and to showcase tourism products that encourage visitors to explore less traditionally popular areas.

Consumer testing (T4.2.2)

Norfolk held a consumer testing trip in April 2022, inviting six members from various ethnic minority groups (Chinese, Black African/Caribbean) to the region to test and feedback on some of the new EXPERIENCE products (**SEE: WPT4 Case Study 1**). Participants from across England experienced a selection of activities including cheese tasting, a boat trip on the Broads, a brewery tour, and a Black History tour. The group’s feedback was shared with participating businesses giving a unique opportunity to refine their off-season offer making it more attractive to the ethnic minority visitor segment, a key target audience for EXPERIENCE. Additional consumer testing included a mixed ethnic group testing an apple orchard experience and wheelchair users testing an accessibility-friendly boat trip experience (**SEE: WPT4 Case Study 2**).

NCC procured an external agency to deliver six consumer testing focus group workshops in autumn 2022, with the groups reflecting the project target audiences (millennials, the over 55’s, the LGBTQ+ community, cyclists, and walkers). The results from the focus groups will inform ongoing decision making on increasing domestic tourism to Norfolk and refining the experiential offer.

The COVID-19 pandemic was a time of turmoil for the tourism industry as well as the public, who were adapting their social behaviours in the face of the pandemic. With this shift in visitor behaviours, it was important to gather some initial indications as to what type of visitor engagement the project could expect and how we would need to adapt marketing plans to accommodate evolving social distancing measures into the experiential tourism approach. In December 2020 we worked with Norwich BID to promote experimental tourism in Norfolk at Norwich Castle Lights Christmas Projections and promoted the Interreg EXPERIENCE project with scene-setting images of experiential tourism. In turn, EXPERIENCE received its earliest visitor feedback indicating average visitor travel to the event, satisfaction, accessibility and

spend (**SEE: NORWICH CASTLE LIGHTS 2020 – KEY OUTCOMES**). The outdoor event took place during a time of COVID-19 national lockdowns when there was no certainty about when the country would return to ‘normality’. The Castle Light projections gave EXPERIENCE valuable insight, enabling us to adapt marketing plans to accommodate evolving social distancing measures into the experiential tourism approach by creating an offer that was possibly closer to home than we’d anticipated and would appeal to more local visitors. An audience research report analysing visitor feedback Norwich Love Light Festival (WPT2), gave insights on attendee demographics, travel choices, reasons for visiting and perceptions on how the event could be made more inclusive and accessible.

- ✓ Setting up focus groups for Business-to-Customer (B2C) testing is a complex process to get right. For us, bringing in external expertise significantly supported the difficulty of matching testers with the target audiences.
- ✓ Some initial desktop research may be useful to better understand the interests and expectations of off-season experiential tourism market segments. This will help ensure new tourism products developed meet consumer demand, attract new markets, and respond to post-COVID-19 travel markets.
- ✓ Be prepared for last minute changes or unexpected challenges so you can adapt plans if needed. The scheduled B2C testing in Norfolk for ethnically diverse audiences was cancelled due to unexpected severe weather warnings and had to be quickly rearranged so we didn’t lose the opportunity to get valuable feedback, so it was important to adapt and be flexible.

Testing new offer and services in a digital lab (T4.2.3)

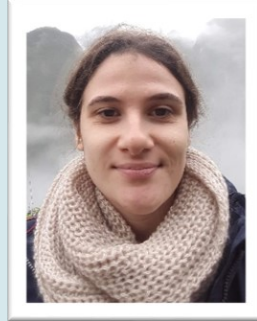
The digital lab testing undertaken by University of Surrey (PP9) took place in May 2022. A selection of promotional material such as videos and leaflets were provided by tourism players in Norfolk (local tourism businesses, the Broads Authority etc) and were tested in a digital lab which used state of the art eye tracking, facial expression, and galvanic skin response testing methods. This testing gave valuable insights into how target groups responded and interacted with those materials and findings were shared with participating local organisations and businesses.

WPT4 Case Study 1: Market research and consumer testing with ethnic diverse groups

We researched the domestic ethnic minority tourism market and identified effective ways to attract this market segment to Norfolk.

Who we are

Maria Theodoraki, Senior Project Officer (EXPERIENCE), Norfolk County Council.



What we did

We developed a targeted marketing plan to better understand the needs, expectations, behaviours, and potential barriers that influence travel trends among ethnic minority communities.

How we did it

Inclusivity and accessibility are key aspects of EXPERIENCE and ethnically diverse communities have traditionally not been targeted in the marketing and promotion of UK domestic tourism so were identified as an obvious target audience in the early stages of the project. Very little research or data on travel patterns of this group was available so the first step was to commission specialists from the University of Northampton to help us plug this gap and gather data on the travel motivations and preferences of diverse ethnic groups in the UK, to clarify the reasons for their low levels of participation and to identify enabling factors that could encourage higher levels of engagement.

They interviewed specialists in ethnic minority travel, ran focus groups with participants from mixed ethnic groups and reviewed existing marketing materials to produce a comprehensive report on Ethnic Domestic Tourism Market.



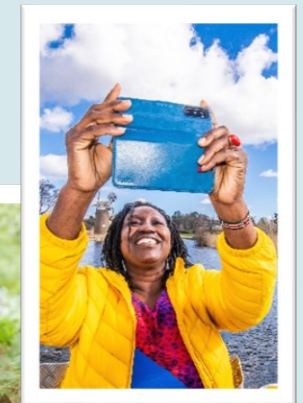
The findings were used to develop an inclusive marketing strategy to diversify market appeal and product offerings of Norfolk. It is hoped that this will start to attract new ethnically diverse visitors to Norfolk year-round, supporting the project aim to extend the holiday season and to enhance the sustainability of the

tourism sector in the county. In addition, this study has wider application for the wider UK domestic tourism sector and there are organisations outside Norfolk expressing an interest to do something similar in their area.

The research was complimented by a consumer testing trip where members from various ethnic groups (Chinese, Black African/Caribbean) were invited to Norfolk to test and feedback on experiences developed as part of the new tourism offer. The group's feedback was shared with participating businesses giving a unique opportunity to refine our off-season offer and making it more attractive to ethnically diverse visitor segment.

Top tips

Ethnically Diverse travellers are more likely to book destinations and holiday experiences where they are represented in marketing communications. Commissioning inclusive photography that can be used in promotional material and social media is a first step to make your marketing campaign more inclusive.



WPT4 Case Study 2: Improving accessibility to The Broads with the Nancy Oldfield Trust

We connect people with accessibility needs with the natural environment.

Who we are

The Nancy Oldfield Trust provides the opportunity for people who use a wheelchair or who have other additional mobility requirements to enjoy a day out on the water, try new activities, improve their self-confidence and increase their enjoyment of the natural environment.



What we did

We collaborated with the EXPERIENCE team to explore ways in which we could market our offer to a wider audience. This would enable more people to benefit from the facilities on offer and would showcase the types of experiences that could be undertaken by those with enhanced needs. Any increased revenue as a result of a rise in visitor numbers would allow the trust to reinvest in facilities, broaden the scope and availability of their offer and consequently enhance experiential opportunities for tourists to the region.



How we did it

The trust worked with EXPERIENCE to summarise their activities in accordance with EXPERIENCE criteria and their copy was overwritten by a marketing copywriter. The trust's activities were subsequently promoted by a Norfolk EXPERIENCE partner organisation, Head East, and featured in a local press listings article in November 2022. A B2C testing visit comprising six wheelchair users and their companions planned for December 2022 was postponed to April 2022 following Covid restrictions and poor weather conditions.



The trust does not usually undertake B2C testing with its visitors, so the subsequent feedback was useful to the trustees in that it provided constructive criticism of both the facilities, boat trip and accompanying facilities. For example, one of the points raised was that some disembarkation points on the Broads were not wheelchair friendly. The trust therefore plans to raise this issue with the Broads Authority who manage the landscape. Feedback also offered suggestions as to what other activities on the Broads would interest the target audience. These will be considered for the next season.

EXPERIENCE also worked with the trust to commission a set of professional photographs to be used for marketing purposes in the next season. The location was dressed by an experienced set dresser and the images were taken in a style which will appeal to the visitor and companions rather than being purely explanatory/functional shots. The trust will use these on their website and in promotional material.



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NORWICH CASTLE LIGHTS 2020: KEY OUTCOMES

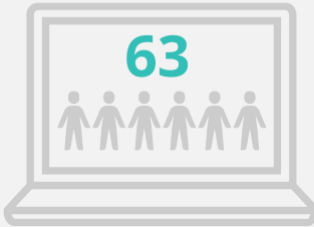
As part of the Love Light Festival 2020, Norwich Christmas Lights lit up Norwich over the festive period. The Castle Projections created a stunning city-centre attraction, transforming the twelfth century palace with eye-catching illuminations. Supporting Norwich's reputation as a city of light, the projector was used to elevate key cultural events and causes. The EXPERIENCE project supported Norwich BID to bring the Castle Projections to the city as part of the Christmas celebrations in 2020.

15,000



Attendees

63



Respondents completed the online survey

Most visitors were from Norfolk

Only **6%** of respondents travelled from **outside of Norfolk**

Visitors travelled on average **9 miles**

57% were Norwich residents

78%



Visitor **satisfaction** with **67%** feeling it have a positive impact on the community

44%



Felt very **enthusiastic** during the Norwich Castle Lights Projections

TOURISM IMPACT ON PERFORMANCE

ECONOMY



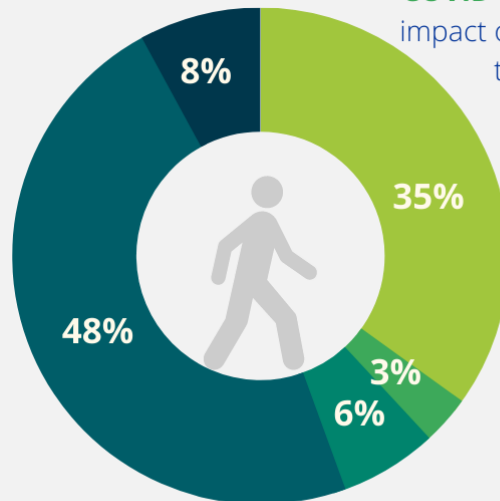
£39

Average spend per party

Mainly spread across food, beverages and gifts

10 respondents mentioned **COVID-19** as having an impact on their experience of event

ENVIRONMENT



COVID-19 restrictions had a big impact on who was able to attend the event, and how

35%

Travelled by foot

On foot (<1)

Bicycle (>1%)

Public transport (>1%)

Car (<1%)

Other (<1%)

SOCIAL

Visitors attended with other people

66%



Most people attended with their partners



Visitors with health conditions **AGREED** that the accessibility of the event met their needs



78%

33% felt more **connected** to their local area as a result of the event

Data were collected by Norwich BID and analysed by Vivid Interface Ltd. and EXPERIENCE.

- ✓ Testing marketing material in a digital lab can give tourism players an opportunity to see what works and what doesn't in their strategies. This can then help them improve the way they are communicating and promoting their offer to potential customers.

Targeted consumer campaigns (T4.3.1)

A marketing strategy was developed for the 2022/23 off-season and NCC delivered a marketing plan which includes a schedule of activities and events based on a monthly theme e.g., *Outdoor Adventure, Inclusivity, History & Heritage* (**SEE: NORFOLK EXPERIENCE ACTIVITY THEMES**). This marketing campaign will promote the Norfolk off-season experiential offer and the Be Norfolk website (T4.3.2) via social media, PR, and digital advertising. To help us with the latter, we procured a specialised digital marketing agency who will be responsible for developing and delivering a creative, innovative, and impactful digital advertising campaign.

EXPERIENCE supported the Broads Authority, together with Visit East of England, on consumer advertising to raise awareness of the Broads National Park. Videos relating to sailing, kayaking, and walking were popular and the off-season photography was well received, resulting in high visitor interactions with these campaigns during the key booking month of January (**SEE: BROADS NATIONAL PARK MARKETING CAMPAIGN**).

The marketing campaign for Be Norfolk was helped by attending the Royal Norfolk Show (June 2022), receiving very positive feedback from those who attended. This two-day event attracted 85,000 visitors to 700 trade stands, represented 17 sectors and themed areas, thus providing hundreds of B2B and networking opportunities. The majority representations of socio-economic classifications of attendees were 40% AB (senior/intermediate professionals, administrators, and managers) and 19% C1 (junior professionals, administrators, and managers), with 59% of visitors aged 35-64. 90% of visitors said the show met or exceeded their expectations. Therefore, the Royal Norfolk Show was an excellent platform to promote the experiential activities and itineraries developed as part of EXPERIENCE to a large, local audience.

EXPERIENCE published several articles highlighting new and underused trails that engage with the deep history and culture along Norfolk's coastline in the popular Norfolk Coast Guardian publication which is distributed at tourist

offices and venues around Norfolk. EXPERIENCE also supported the production of an episode of the "*Best of British by the Sea*" series which aired on More 4 in June 2022, with celebrity chef Ainsley Harriott MBE and journalist/restaurant critic Grace Dent. The objective of supporting this was to build a critical mass of interest and support for novel, local, immersive tourism for domestic viewers and showcase Norfolk as a year-round destination.

Targeted photography included photo shoots of various activities around Norfolk with an emphasis on capturing accessible and diverse participatory audiences.

Through the training delivery developed by EXPERIENCE in **WPT1**, other local authorities in Norfolk were inspired to develop their own targeted consumer campaigns. EXPERIENCE was able to help King's Lynn & West Norfolk Borough Council understand the expectations of their target demographic to develop and market sustainable, off-season tourism products tailored to this audience (**SEE: WPT4 Case Study 3**).

- ✓ Identify the knowledge gaps in your team so you can commission the right external expertise at the right time. Working with experienced marketing experts was invaluable in helping us shape and deliver our marketing strategy.
- ✓ Presenting your offer to large local audiences (as EXPERIENCE did at the Royal Norfolk Show) is a great way to ensure that residents can discover local tourism opportunities, which aligns with the sustainability ethos.
- ✓ Creating a keyword-searchable photobank of off-season images facilitates an easy-access database of relevant stock photographs to use for communications and promotional material

Online pre-visit inspiration and interactive trip-planning platforms (T4.3.2)

The Be Norfolk website, launched in September 2022, aims to showcase Norfolk's unique natural and cultural assets as well as promoting experiences developed with local businesses (T1). Attracting and inspiring new potential visitors through the website is achieved in an eye-catching and innovative way (**SEE: EXPLORE NORFOLK EXPERIENCE ACTIVITIES**). Users will be able to search across 300 experiential activities and 100 curated itineraries to build, download and share their own itineraries with their co-travellers. A blog-style



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NORFOLK EXPERIENCE ACTIVITY THEMES

EXPERIENCE curated 100+ itineraries from 300+ activities around Norfolk. Visitors to the Be Norfolk website will find itineraries designed for curious travellers seeking unusual places to stay, eat and play. With a wide range of themed itineraries lasting from 2 to 5 days, there is something for everyone and visitors can discover expert guides, cultural treasures, stunning views, planet friendly food and drink, outdoor challenges, natural wonders, and off-the-beaten track destinations only locals know.

A CHANGE OF PACE

14 activities

Tree Bathing • Meet and Greet Alpacas • Wartime Spies • Windmills and Winston



OUT OF THE ORDINARY

15 activities

Live in a Lighthouse Experience • House Detective • The Shoebox Lantern Light Underground Tours

ON THE WATER

32 activities

Curlew Coastal Charters • Nancy Oldfield Canoeing • Go Paddle



GET CREATIVE

18 activities

Spoon Carving • Bellringing • Bressingham • Garden Wreaths

357

activities (incl. those in development)



NATURAL NORFOLK

43 activities

Bird Watching in Stiffkey • Norfolk's Chalk Reef • A Storm of Birds



GO GREEN

38 activities

Beans Boats Seals • Delegate Organic Farm Tours • Wiveton Downs Dark Skies

FOOD & DRINK

40 activities

Brancaster Mussels • Silver Triangle Gin & Cocktail Tour • Cheesemaking

HERITAGE & HISTORY

136 activities

Murder At the Mill? • Fisherfolk of Trues Yard • Salt, Speed and Seafaring

OUTDOOR ADVENTURE

13 activities

Fire & Water at Thetford Forest • Tubing Experience • Watatunga Private Tour & BBQ



9 themes



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BROADS NATIONAL PARK MARKETING CAMPAIGN

EXPERIENCE supported the Broads Authority with their marketing campaign, aiming to extend their reach to new audiences, through a range of adverts incorporated into online campaigns. The number of people reached significantly rose from autumn to winter, increasingly engaging with the content during the off-season. Much interest came from residents in and around Norwich city and from potential visitors 50 - 100 miles outside of Norfolk. Attracting visitors from just beyond Norfolk's neighbouring counties has the potential to increase visitor spending in the regional economy whilst generating a relatively low carbon footprint.

TARGETED ADVERTISEMENTS TO SPECIFIC AUDIENCES



WALKERS & CYCLISTS
Aged 25 - 65+



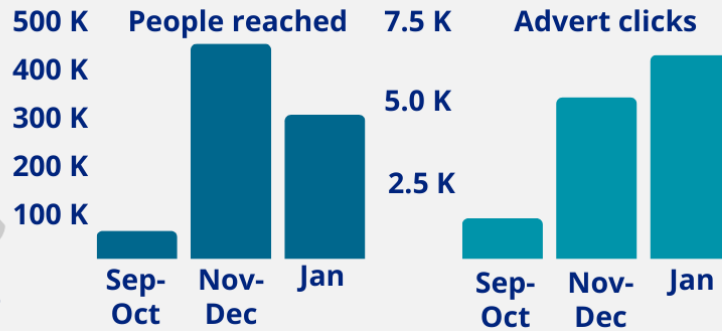
YOUNG URBANITES
Aged 20 - 40



EMPTY NESTERS
Aged 55 - 65+



Facebook Ads
July 2022 - January 2023



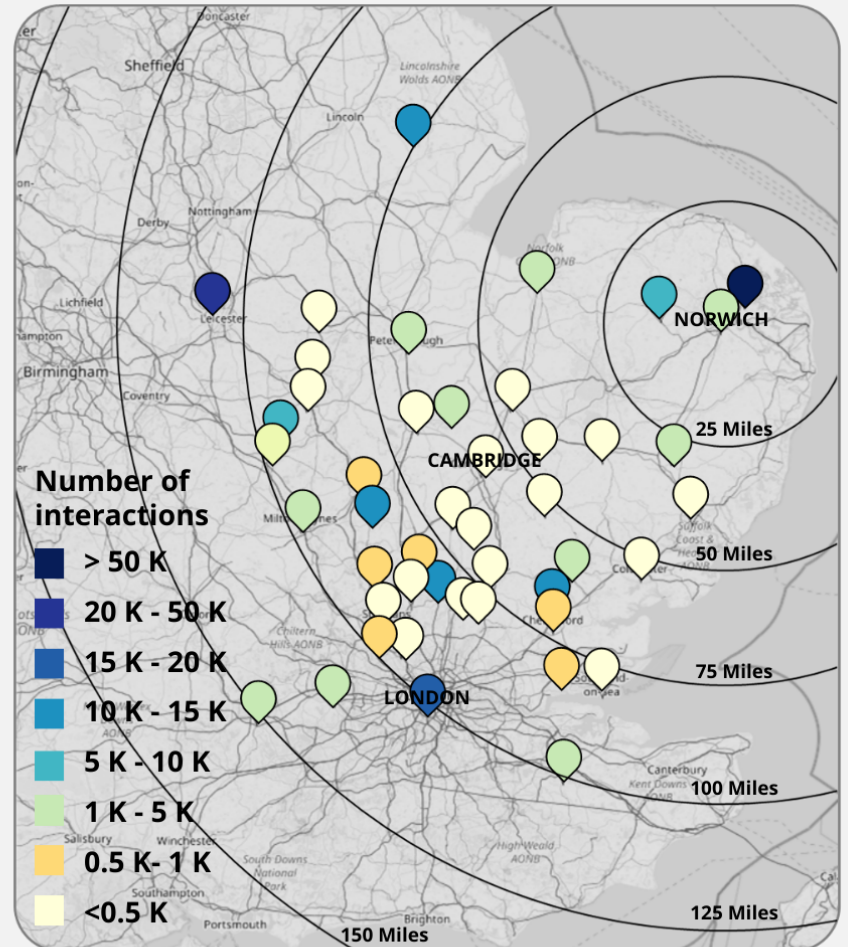
Google Ads
July 2022 - January 2023



"Empty Nesters" were most interested in Facebook adverts about walking

Most popular Google video adverts were related to sailing

Google advertisement geographical reach from Norfolk



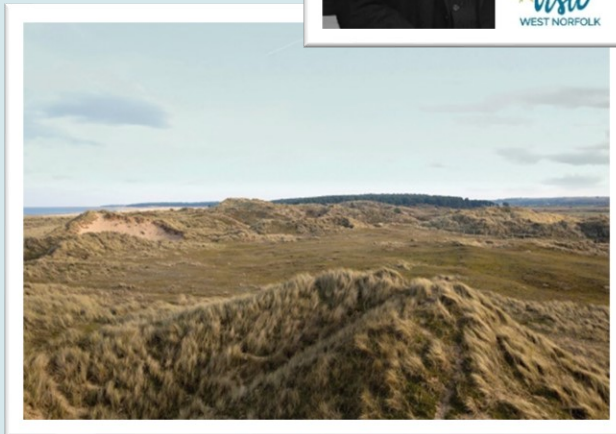
Data were collected by Broads Authority using Google and Facebook analytics.

WPT4 Case Study 3: King's Lynn & West Norfolk Borough Council

We received a vital amount of support and access to great local tourism-based content when creating our forthcoming brand-new visitor-focussed coastal trail titled 'Norfolk Coast: Myths & Legends'.

Who we are

Phil Eke, Senior Tourism Officer, King's Lynn & West Norfolk Borough Council. Me and one other officer represent a tourism marketing and promotions organisation, Visit West Norfolk. We highlight the great and varied aspects of all that West Norfolk has to offer to potential visitors and residents, regardless of their age, interests, or other demographics. From the Fens in the south to the coastal edges of west Norfolk in the north (and everywhere in-between) we are supported in our work by our local government to assist tourism and retail businesses as well as our tourism-linked organisations and heritage venues throughout West Norfolk in driving footfall to this spectacular area of Norfolk.



We concentrate our tourism promotional work equally through digital tourism campaigns and printed publications. From distributed leaflets, glossy tourism booklets and printed adverts to time-based online or social media promotional campaigns, we strive to make sure our vibrant content will engage and appeal to a broad a range of visitors.

What we did

We wanted to create a new coastal trail to specially (although not exclusively) target young adults in the off-season. In response to a recognition that there is also a need to focus energy on specific demographic-related trend-based

tourism experiences we wanted to create a new coastal trail to specifically (although not exclusively) target young adults in the off-season. This will help to showcase the year-round tourism appeal of the area (from seasonal local food and cosy hospitality venues to refreshing winter-time trails and beyond) to a currently underrepresented target audience.



How we did it

We often say to our local tourism businesses, "Know who your audience is now - and know who they will be". For this new trail we wanted to attract young adults primarily in the off-season. Support from the EXPERIENCE project really helped us have a better insight into the expectations and trends of this modern audience. As an example, EXPERIENCE gave us advice on the experiential tourism potential of the trail (i.e. what coastal experiences did we want to effectively promote to such a specific audience?) and, crucially, exactly what off-season our newly proposed coastal trail has for our chosen demographic.

Another aspect, which we didn't consider before seeking advice from EXPERIENCE, was the element of sustainable tourism appeal along our coastline. Through EXPERIENCE we gained a great deal of information specifically focussed on local sustainability, such as local produce, lower carbon-based modes of travel (including sections of the walking trail also accessible by boat!) and so on.

news page will also be available where users can stay up to date with new activity/itinerary opportunities in the area (**SEE: WPT4 Case Study 4**).

NCC continues to develop experiential content that will feature on the new website in addition to the activities and itineraries such as pre-visit inspirational podcasts for Great Yarmouth (**T2.2.5**) or a digital book of Hindu meditations.

The “*Every Move*” platform continues to grow with more activities added and around 30,000 unique site visitors since March 2022. The platform provides up-to-date information on accessible leisure activities to inspire and engage out of season visitors as well as locals (**SEE: WPT4 Case Study 5**).

- ✓ When considering accessibility, it was important to remember that accessibility needs vary and what is accessible for one person might not be true for another. There is no ‘one size fits all’ so, we aimed to provide as much information as possible when marketing experiences so visitors could make informed decisions about whether an experience met their particular access needs.

Travel Trade and Distribution (T4.3.3)

Norfolk has had the opportunity to showcase the region’s offer from the EXPERIENCE project by participating in 6 tourism travel events. Seasonal and sustainable tourism offers developed by EXPERIENCE were represented at the National Outdoor Expo (March 2022) during English Tourism Week, an event targeted at cyclists and walkers, where the Norfolk EXPERIENCE offer was promoted to those consumer markets on a national level to an expected 10,000 visitors. Norfolk was represented at various events including the UK Inbound Networking Event (March 2022), the Explore GB and VIBE travel trade shows (April 2022), UKInbound British and Irish Marketplace (January 2021, 13 1-2-1 meetings), World Travel Market Expo (November 2021), the International Trade fair Berlin (ITB March 2021, 5 1-2-1 meetings).

Over 30,000 visitors attended the World Travel Market Expo to network and negotiate with exhibiting companies and other show attendees. 3,000 of these were members from international media. At the International Trade fair Berlin in 2021, 3,513 exhibitors from 120 countries we present on the digital platform. Approximately 65,700 users took part in the event.

Attending travel trade events served as valuable platforms to promote the EXPERIENCE project and its offer to various travel trade and other tourism stakeholders and resulted in face-to-face meetings with a range of travel trade representatives operating both domestically and internationally. Additionally, it was useful opportunity to explore the COVID-19 impact on international travel trade and to keep in touch with travel trade trends. Learning from these events was shared with local stakeholders. The learnings were also integrated into training workshops and meetings with businesses (**T1.3.3**) to ensure they inform the development of experiential activities (**T2.2.2**).

Working in partnership, NCC and Visit East of England (VEE), created a travel trade section on the VEE website to boost the profile of Norfolk, and the East of England, to the travel trade. This will support VEE in promoting and contracting more sustainable tourism products to sell to their customers and clients. The new addition was featured in the *UKInbound* June newsletter which was circulated among its members.

- ✓ Sustainability must be a non-negotiable element of all tourism recovery plans.
- ✓ Interest in outdoor activities e.g., cycling and hiking is growing rapidly as people are looking to reconnect with nature. Post-COVID tourism offers should encourage a digital detox and the opportunity for physical and spiritual rejuvenation.
- ✓ Activities such as night canoeing and star hikes are increasing in popularity and are also more suited to off-season because of the darker skies.
- ✓ The domestic market will continue increasing, but it is predicted that the international market will recover sooner than expected.
- ✓ Digitisation is imperative; the use of mobile devices has significantly increased since summer 2020 and many more people are now happy to book and order online.
- ✓ The use of social media, vlogs, travel podcasts to create awareness and pre-visit discourse is important to reach wide and diverse target audiences.

WPT4 Case Study 4: 'Be Norfolk' – Choose your own Norfolk adventure

Be Norfolk is a new website, inspiring visitors to take a fresh look at Norfolk and uncover immersive, off-the-beaten path adventures unique to them.

Who we are

Dr Katy Owen, Protected Landscapes Manager, Norfolk County Council.



What we did

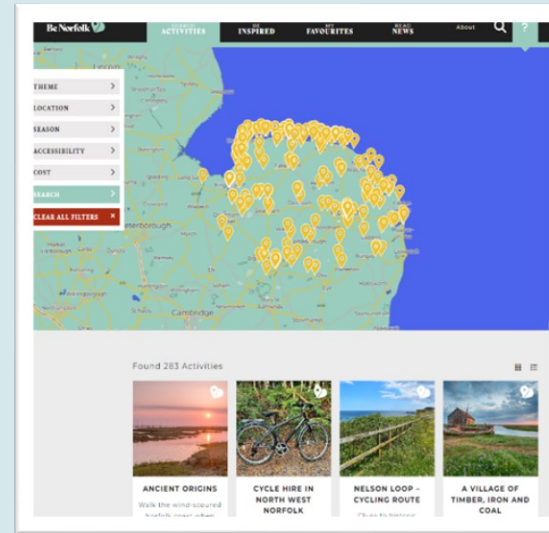
Every corner of Norfolk bursts with something special but despite this, visitors from near and far are drawn to the same destinations, at the same time of year, leading to unwanted impacts on popular locations. EXPERIENCE provided the opportunity and inspiration to do something different to help tourists make new memories without creating strain for destination managers.

The project focuses on creating strong connections between people and place. By immersing visitors in nature and culture, and drawing them away from tourism hotspots, it's possible to create a more enjoyable and sustainable experience for all involved. We created a platform to make it easier for people of all backgrounds and abilities to 'choose their own adventure' and uncover something special. We don't just want you to visit Norfolk; we want you to join us and 'Be Norfolk'!

We aim to make it easy for everyone find something special in Norfolk that really resonates with them and creates a lasting memory. Users can browse a wide range of eye-catching yet little known experiences to plan their dream getaway – whether visiting for a day or a week; on a budget or want to blow the budget; interested in the arts, heritage, nature, getting active or slowing right down – there is something for everyone. On Be Norfolk you'll find experiences which focus on taste, touch, sound and smell alongside clearly marked activities which we think wheelchair users will enjoy.

How we did it

Be Norfolk creates access to more than 300 uniquely Norfolk experiences and 100 inspiring itineraries. We took a bottom-up approach to developing this content, working with small businesses, artists, storytellers, residents, artisans,



and adventurers to uncover local stories and produce and hidden natural and cultural assets.

We made the site and the activities as accessible and inclusive as possible. It's important that everyone feels welcome in Norfolk, leading to a wide range of free activities, alongside those which charge a fee. We highlighted sensory rich experiences alongside those which are wheelchair friendly,

and our map identifies toilets close to each listing.

We feel strongly about helping people to find a Norfolk they can connect to. The website offers a range of themed itineraries for inspiration but encourages you to choose your own adventure. You can do this easily from your phone or tablet, share your creation on social media or with travel companions, and download to view later or offline. It's easy to stay up to date with new experiences through a blog-style news page available on Be Norfolk.

The launch of Be Norfolk is just the start of a new, more sustainable tourism industry in Norfolk. We will continue to work with local people to create new and exciting content, which delivers benefits for nature and communities, as well as rural economies. We want to expand our accessible content and champion businesses which deliver over and above for a greener and more inclusive future for our region.

Top tips

Crowd-sourcing the website content from locals makes it come alive and gives an authentic sense of place in a market which often feels crowded with expensive and generic tourism offer.

WPT4 Case Study 5: 'Every Move' activity finder

Promoting accessible health and wellbeing opportunities by connecting people with nature.

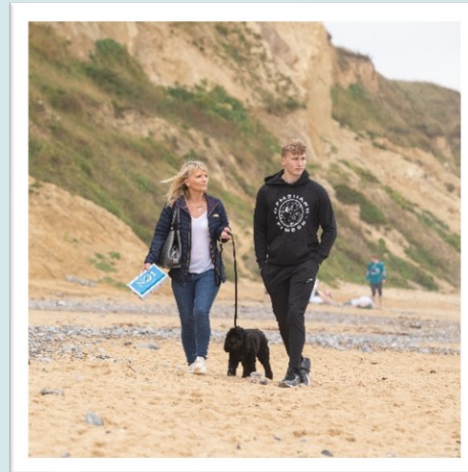
Who we are

Gareth Samuel, Digital Development Officer, Active Norfolk.

What we did

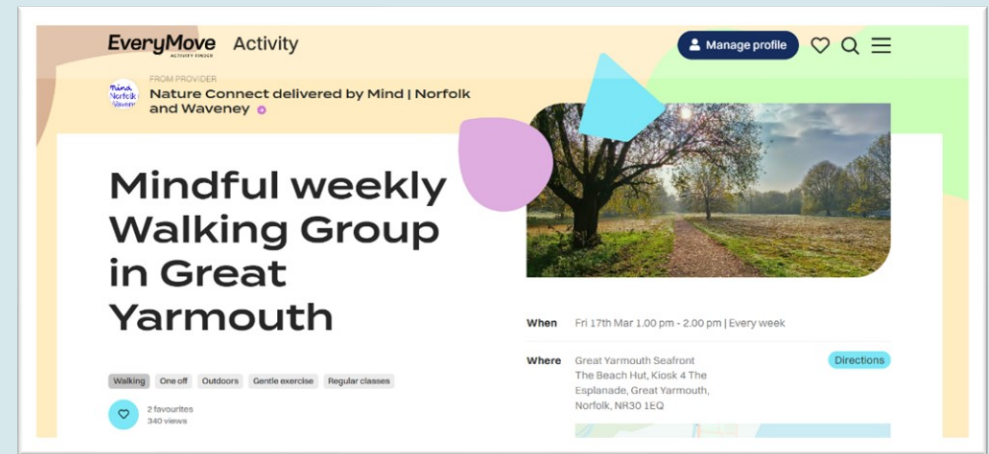
Every Move, an online directory of physical activities across Norfolk, was developed by Active Norfolk and Norfolk County Council, supported by the Interreg FCE EXPERIENCE project and the Interreg 2 Seas MONUMENT project, both co-funded by the European Regional Development Fund.

One key facet of the platform is the access to nature that it provides for people either visiting Norfolk or permanent residents of the county looking for activities in the great outdoors. Our diverse network of activity providers, such as West Norfolk Deaf Association, EPIC Norfolk, Age UK Norwich, and Norfolk & Waveney Mind, deliver several accessible walks and trails. Together they have received around 800 views and continue to use the Every Move platform as a means to promote their activities.



How we did it

The bright Every Move branding reflects the energy and range of opportunities available on the platform, where user experience has been considered at every stage. The result is a platform which effectively connects activity providers with Norfolk residents and visitors who are looking for ways to adopt physical activity as part of an active lifestyle. Every Move recognises that exercise means different things to different people. There is a natural connection for most people between exercise and competitive sport, however in reality, most exercise opportunities are played at a community level which



has a huge impact on people's health and wellbeing. The Every Move platform is a place to find physical activity opportunities for all.

To populate the platform with suitable activities, we have a dedicated team of people developing relationships with providers across the county, ensuring they are getting the best out of Every Move and enabling us to always add new activities. The search functionality of the platform is built to enable enhanced flexibility, with filters for accessibility needs, age requirements and location.



One of the best things about living in Norfolk is the access to natural beauty all around us from ancient woodlands to stunning beaches. For residents and visitors, the Every Move

platform provides information about walking routes, cycling loops and exercise opportunities in green spaces all around the county. People can find somewhere new to explore and learn a bit about what they will find there before setting off.

5. Evaluating & improving sustainability within new off-season tourism offer (WPT5)

To guarantee that EXPERIENCE delivers lasting benefits for the economy, environment, and society WPT5 identified and tracked the key indicators to measure performance against these outputs throughout the duration of the project (**SEE: Methodology**). Performance indicator monitoring enabled EXPERIENCE to ensure that off-season tourism offer was demand-driven and responded to the new strategy. EXPERIENCE project partner the University of Surrey led on the co-development of the indicators over 4 collaboration workshops in the second, third and fourth years of the project (Cornwall Oct 2020; Surrey Apr 2021; Compiègne Oct 2021 and Kent Mar 2022).

WPT5 Activities Summary

- ❖ **WPT1:**
 - 5 Case studies
 - 2 EXPERIENCE-supported Business Impact surveys (Autumn 2022 – Winter 2023); 30 respondents
- ❖ **WPT2:**
 - 5 Case studies
 - 103,812 off-season visitors to 4 EXPERIENCE-supported events
 - 4 EXPERIENCE-supported events surveys (2,344 respondents)
 - Visitor carbon footprint calculations
- ❖ **WPT3:**
 - 3 Case studies
 - 1 Business Impact survey relating to EXPERIENCE-supported infrastructure upgrade (8 respondents)
 - 3 Residents surveys regarding EXPERIENCE-supported infrastructure upgrade (delivered as part of the Norfolk Residents Surveys from Winter 2022, Summer 2022, and Winter 2023; 2,230 respondents)
 - 54,758 off-season visits to EXPERIENCE-upgraded infrastructure
 - Biodiversity net gain through habitat creation around EXPERIENCE-upgraded and newly created infrastructure
- ❖ **WPT4:**
 - 5 Case studies

- Visitor market feedback from 1 EXPERIENCE-supported event
- 1 report on the Norfolk Ethnic Domestic Tourism Market
- 1 report on EXPERIENCE-supported marketing campaigns
- ❖ **WPT5:**
 - Norfolk visitor economy volume, and value
 - Norfolk visitor seasonality and frequency
 - Norfolk international visitor travel trends
 - Norfolk domestic visitor travel trends
 - 6 Norfolk Residents Surveys

Where possible, the economic, environmental, and/or social impact of specific off-season activities developed by NCC, i.e., events (**WPT2**), infrastructure (**WPT3**), marketing (**WPT4**), have been described in the preceding chapters of this report. The following sections describe findings from additional sources of data through desk-based research, tourism data procurement and surveys carried out by EXPERIENCE.

Economic Performance (T5.2.1)

Norfolk is the fifth largest shire county in England, with a population of nearly 900,000, expected to reach over a million by 2036. Norfolk has one of the largest county economies in the UK with more than 37,000 businesses and 348,000 jobs, worth £18 billion.

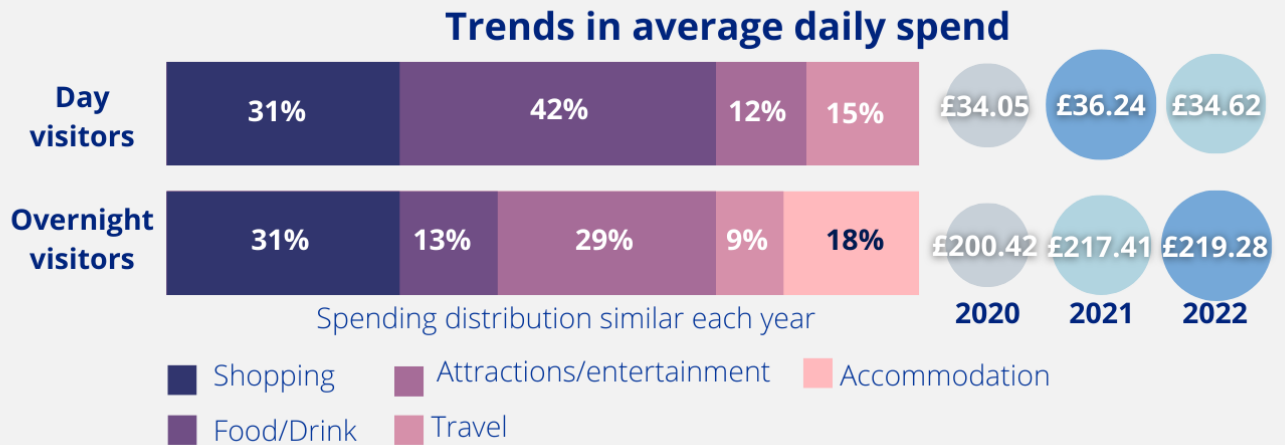
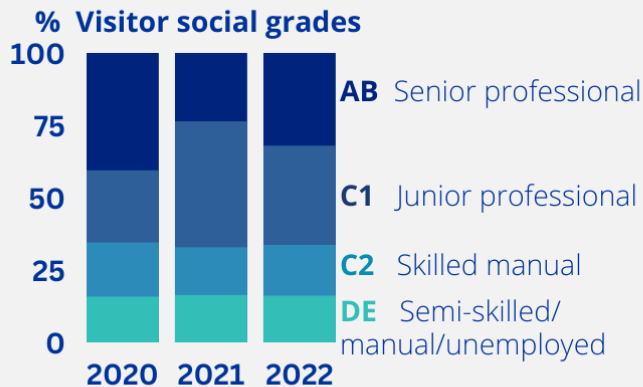
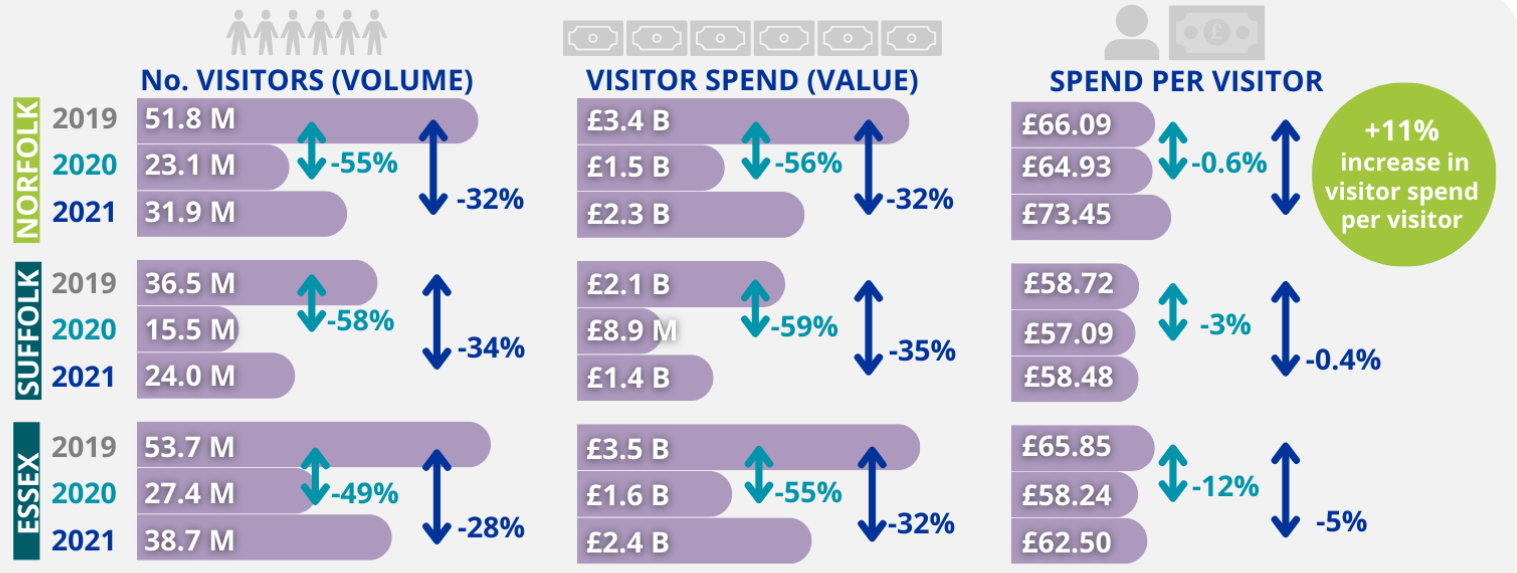
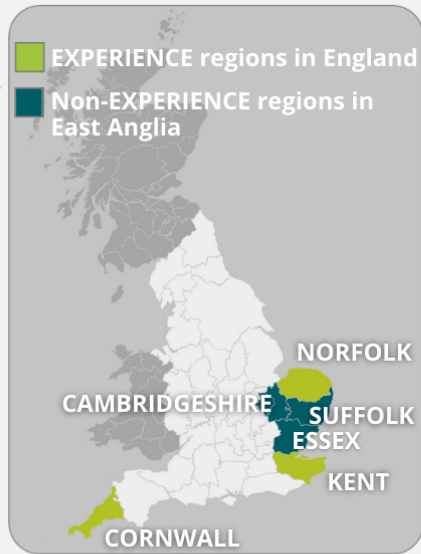
Recent tourism volume and value figures were derived using the Cambridge Economic Impact Model, reporting 46.7 million visitors to Norfolk with a tourism value of £3.25 billion (£69.48 average spend per visitor) in 2017, the designated baseline year before the start of the EXPERIENCE project. In 2018, both the volume and value of tourists increased to 50.9 million visitors, spending £3.34 billion (£65.55 average spend per visitor). The following year in 2019, after the start of EXPERIENCE, this upward trend continued until it was cut by half due to the COVID-19 pandemic in 2020, when all non-essential travel was prohibited. In 2021, Norfolk recovered two thirds of its pre-pandemic volume and value (**SEE: TOURISM IN NORFOLK – VISITOR ECONOMY**).

Using preliminary data of 2022 estimates (final figures are to be published in summer 2023), analysts in the tourism sector are optimistic that the 2022 volume and value will demonstrate recovery to pre-pandemic levels in Norfolk.



TOURISM IN NORFOLK: VISITOR ECONOMY

Due to COVID-19 travel restrictions in 2020, Norfolk lost half the number of day and overnight visitors and over 50% tourism revenue generated in 2019. Similar trends could be observed in the nearby regions of Suffolk and Essex. The visitor economy of East Anglia is recovering and as of 2021, is around a third less than 2019. The average visitor spend in Norfolk has increased by just over £7 since 2019, far more than comparable areas in East Anglia implying that tourism recovery in the Norfolk EXPERIENCE pilot region has been improved, at least in part, by the activities of the project.



Data were provided by Destination Research Ltd.

Similar trends in tourism recovery can be observed in nearby regions of Suffolk and Essex. However, the average visitor spend on accommodation, transport, retail, attractions, and food/drink has increased by 11% in Norfolk, whilst it is decreasing elsewhere indicating that tourism recovery in the Norfolk EXPERIENCE pilot region, has improved more than in non-EXPERIENCE areas.

The social grades of visitors to Norfolk remains relatively unchanged since 2020 with about 65% comprising people in senior and junior professional roles. It is important that low-cost and free tourism offer is promoted so that visitors and residents from low-income households benefit from Norfolk's tourism assets. A feature of the **Be Norfolk website** is that it allows users to filter activities by cost, improving accessibility to tourism products for all budgets. Aligning with the ethos of accessible tourism for all, **Fire On The Water 2022** adopted a "pay-what-you-can" structure so that ticketing prices were inclusive for people on lower incomes. It is becoming increasingly significant for tourism providers to consider the financial implications for potential visitors due to current strain on household finances resulting from COVID-19 and the increasing cost of living.

The overall pattern in seasonality of overnight visitors to Norfolk remains largely unchanged since 2017, with most visits occurring in the July and August months, coinciding with school summer holidays (**SEE: TOURISM IN NORFOLK – SEASONALITY & FREQUENCY**). While this pattern is also reflected in the seasonality of day visits, the difference between the numbers of day visitors in the off-season versus peak season more evenly distributed the year compared to visitors staying overnight.

In 2022, almost three quarters of day visitors revisited Norfolk several times a year. Over 40% of overnight visitors stated they revisit several times a year, a quarter of which stay in serviced accommodation and about one third stay in self-catered accommodation, demonstrating the appeal of Norfolk as somewhere to visit often and good likelihood of frequent spending on local services from repeat visitors. 70% of visitors stated they revisit Norfolk several times a year in the off-season compared to 50% in peak season. Visitor intention to revisit Norfolk as "very likely" remarkably increased from 29% in 2021 to 69% in 2022 (**SEE: TOURISM IN NORFOLK – VISITOR TRENDS**). 81% of visitors were likely to recommend Norfolk tourism in the off-season compared to 76% in the peak season. Visitors to EXPERIENCE-supported events reported very high levels of visitor satisfaction and/or intention recommend the event

(**Love Light Norwich 2022**, 87% would recommend; **Norfolk Open Studios 2021**, 97% satisfaction; **Fire On The Water 2021**, 99% satisfaction and 97% would recommend). Taken together, the high intention to revisit, visitor satisfaction and intention to recommend not only provides a large potential audience for future EXPERIENCE activities but demonstrates the value of EXPERIENCE-supported events that have already taken place.

At the heart of Norfolk is the cosmopolitan and historic city of Norwich, the most populated of the county's cities, home to 16% of Norfolk's residents. Norwich is one of the UK's most popular tourist destinations and with both rail and air links the city attracts many domestic and international tourists. Norwich is consistently the main destination for tourists to Norfolk and remains so. However, this reduced slightly from 26% 2019 to 24% in 2022 in line with the project aim to promote tourism products that encourage visitors to explore less traditionally popular areas.

Due to COVID-19, Norfolk lost 75% overseas visits, half of which arrived by plane. The overseas market has taken longer to recover, impacting the number of overnight stays as the visit duration is almost double that of domestic travellers. Visitors who travel further stay longer and are likely to spend more money in the region, therefore, there was an opportunity for the EXPERIENCE approach to attract more domestic visits to Norfolk. Norfolk has an abundance of outstanding natural capital assets that lend themselves to experiential tourism development. Indeed, the EXPERIENCE pilot project taking place in Norfolk could be considered timely it has helped the region recover some of the lost expenditure due to COVID-19 by attracting more locals to substitute for international arrivals. In all, the activities of the EXPERIENCE project have secured the foundations upon which the Norfolk tourism industry can help build lasting economic resilience by supporting local business and creating year-round jobs.



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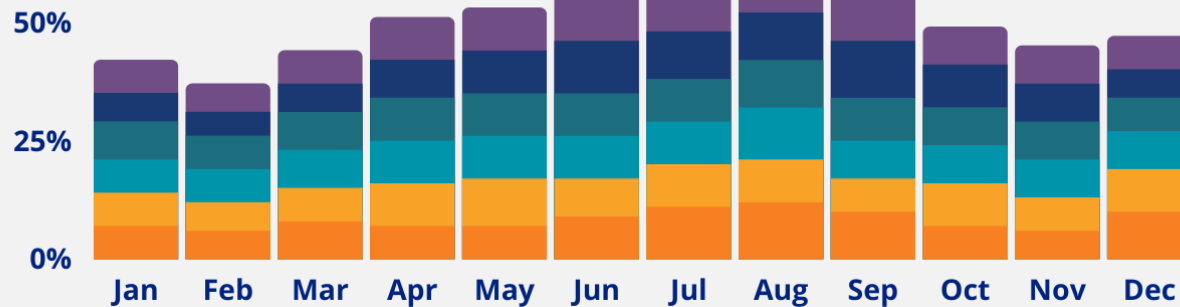
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 Norfolk County Council

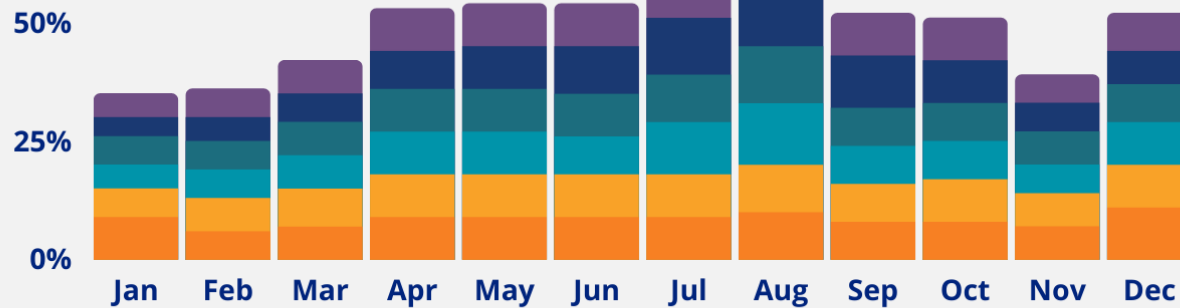
TOURISM IN NORFOLK: SEASONALITY & FREQUENCY

Information about seasonal tourism in Norfolk were derived from the Cambridge Economic Impact Model, which utilises data from national tourism surveys and regional data that are modelled and analysed by independent tourism research agencies. Overall, most visits occur during peak season summer months and it may take some time before effects of EXPERIENCE activities are fully actualised and reflected in these regional annual statistics. Encouragingly, visitors are 20% more likely to re-visit several times a year in the off-season than low-season, representing a large pool of repeat visitors to engage in off-season activities.

75% Day visits



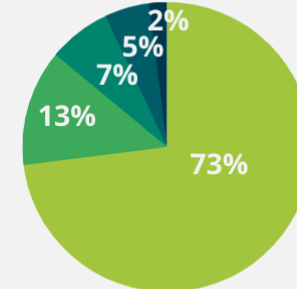
75% Overnight visits



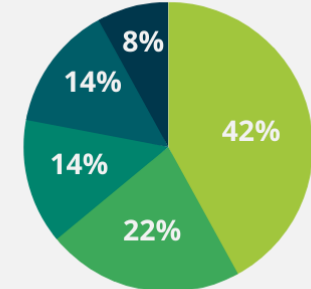
2017 2018 2019 2020 2021 2022

Re-visits to the area

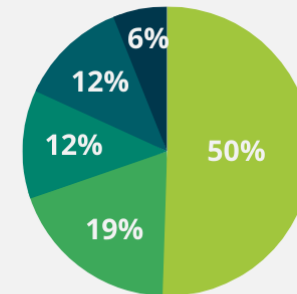
Day



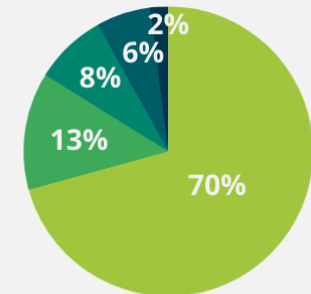
Overnight



Peak season



Off season



- Several times a year
- Once a year
- Once every two years
- Once every 3 - 5 years
- Less frequently

Data were provided by Destination Research Ltd.



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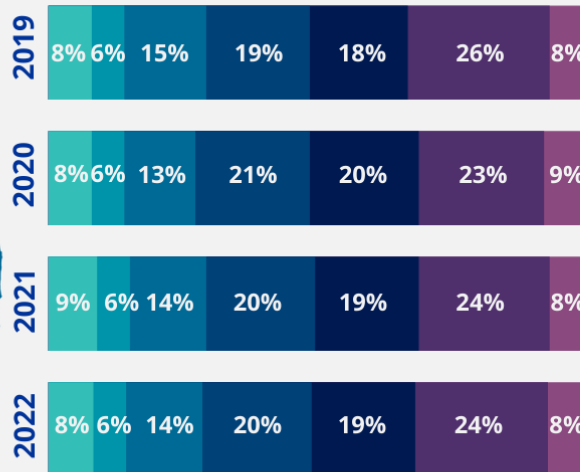
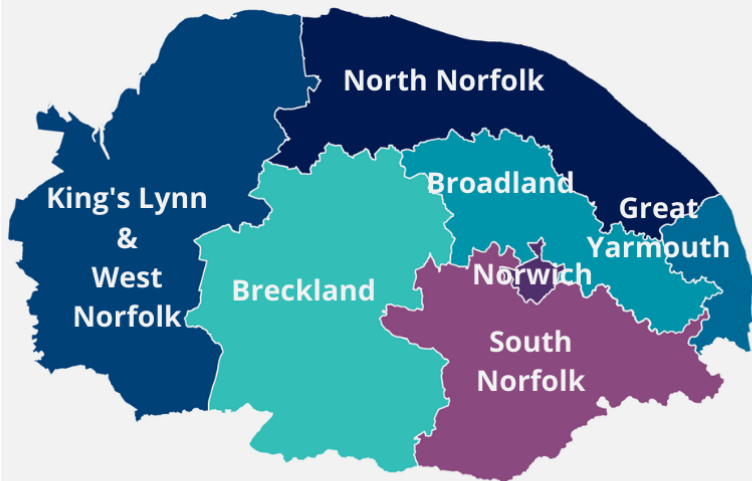
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 **Norfolk** County Council

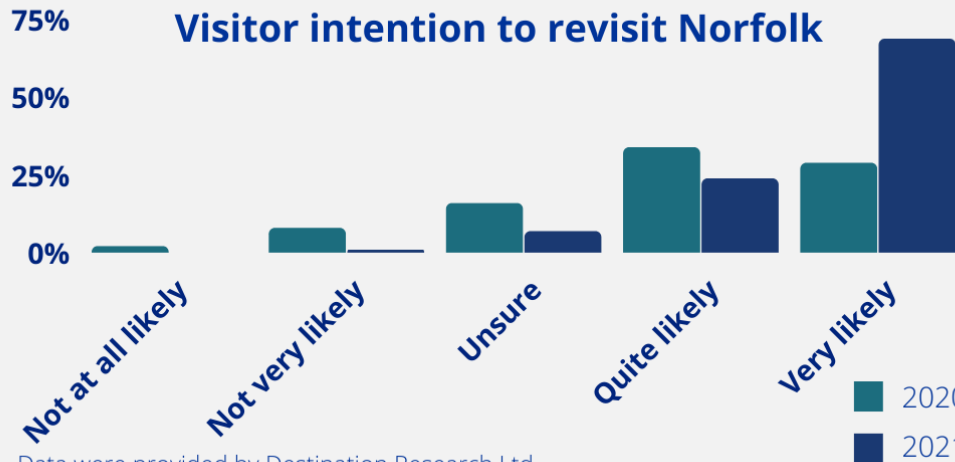
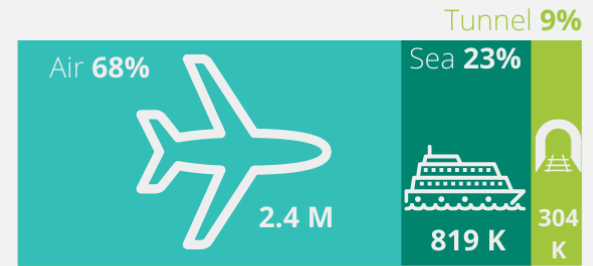
TOURISM IN NORFOLK: VISITOR TRENDS

The distribution of visitors around Norfolk has changed very little in recent years, with the largest share of visits occurring in Norwich, King's Lynn & West Norfolk and North Norfolk. In 2022, 97% of visitors said they were likely or very likely to re-visit Norfolk. In 2021, a significant number of visitors were likely to recommend Norfolk tourism, 5% more favourably in winter than summer. During the project lifetime there has been a dramatic increase in visitor intention to re-visit Norfolk. Taken together, there is vast support for off-season tourism representing a receptive market for EXPERIENCE-supported activities.

Destinations of travellers visiting Norfolk

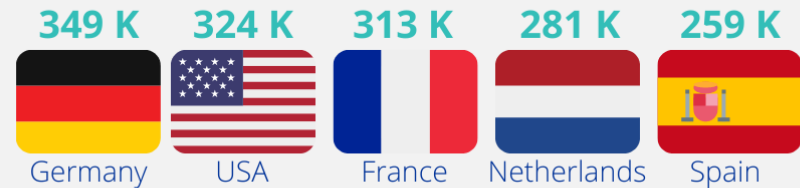


International trips to Norfolk by mode of transport (2019)

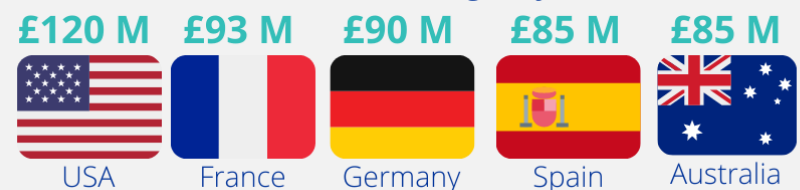


Data were provided by Destination Research Ltd.

Top 5 Norfolk visitor countries of origin by volume (2002 - 2019)



Top 5 Norfolk visitor countries of origin by value (2002 - 2019)



Environmental performance (T5.2.2)

Experiential tourism is becoming increasingly popular as travellers are seeking authentic, a once-in-a-lifetime encounter and gain emotional connections with new cultures and nature. COVID-19 accelerated the trend for staycations rather than overseas travel, with many more UK residents opting to discover tourism options on their doorstep. Norfolk has vast potential in the experiential tourism arena as it hosts spectacular and diverse landscapes, such as the Broads National Park, the Norfolk Coast (one of the UK's 46 Areas of Outstanding Natural Beauty) and The Wash and North Norfolk Coast European Marine Site, for residents and visitors to enjoy and connect with nature. A crucial aspect of EXPERIENCE is to collect data about environmental performance to measure the impact of tourism and contribute to establishing long-term tourism practices following successful sustainable approaches.

In 2021, over one third of visitors to Norfolk arrived from neighbouring regions in the East of England (**SEE: TOURISM IN NORFOLK – TRAVEL TRENDS**).

Another third of domestic Norfolk visitors travel a little further from the East Midlands and the South-East combined. Most visitors in 2020 reached Norfolk by petrol-fuelled car, on average carrying 3 to 4 passengers. However, when in Norfolk, 30% of motorists opted for more sustainable modes of transport as cycling increased from 1% to 4% and walking substantially increased from 3% to 31%. From an environmental perspective, the willingness of visitors to engage in sustainable travel once in Norfolk is very encouraging and suggests that there is already good infrastructure in place that enables this. Additionally, it demonstrates demand for sustainable travel, which can benefit from added investment to expand green transport infrastructure in the region.

Visitors travelled an average of 25 miles or just under 30 minutes to reach EXPERIENCE-supported events. Over 40% of visitors to Norwich Castle Lights 2020 attended the event on foot, by bicycle or public transport. Around one third of same-day visitors to Norfolk Open Studios 2021 travelled by sustainable modes of transport, 80% of over-night visitors used non-motorized transport to attend the event. This is an impressive proportion of overnight visitors, that stay in Norfolk for 7 days on average, actively choosing sustainable ways to travel short distances. It is important that Norfolk continues to provide and maintain low carbon travel options for visitors to keep pollution and congestion from car travel to a minimum.

EXPERIENCE estimated the carbon footprint of visitors to Norfolk had not only reduced since the project baseline year of 2017, but that the carbon footprint of people visiting EXPERIENCE-supported events was 30 – 60% lower (**SEE: NORFOLK VISITOR CARBON FOOTPRINT**). Taken together, these data demonstrate that many tourism activities that EXPERIENCE has helped develop or support attract visitors to Norfolk in the off-season with relatively low carbon impact.

More widely, EXPERIENCE project activities contribute to local government goals set out in the NCC environmental policy, published in 2020. The activities developed by EXPERIENCE in **WPT1** has connected and trained local actors and suppliers to work together in providing sustainable tourism opportunities. This enabled creation of tourism products and delivery of events in **WPT2** that supports policy to connect people with the environment, improving health and wellbeing, in a way that has low environmental impact.

The EXPERIENCE approach taken to deliver the NWAT, Innovation Incubator projects and the refurbishment of the Bure Valley Path in **WPT3** supported NCC's objectives to enhance beauty, heritage, and engagement with the natural environment whilst also encouraging a thriving plant and wildlife community. Additionally, under the Environment Act 2021, all planning permissions granted in England will have to deliver at least 10% Biodiversity Net Gain (BNG) from November 2023. EXPERIENCE upgrade and infrastructure projects were planned and delivered before this legislation came into effect, but nevertheless the ecological enhancements through introduction of new habitat creation products and planting supports local BNG targets, creating a legacy beyond the project.

Through effective marketing strategies developed in **WTP4**, NCC has successfully engaged target audiences from nearby regions in England that will minimise the environmental impacts from visitor travel to Norfolk, in line with policy aimed at mitigating large carbon footprints typically associated with the tourism industry. Much of the output developed by NCC on the EXPERIENCE project will be managed and maintained beyond the project lifetime by the wider Environment Service at NCC and will help inform future green infrastructure initiatives currently in development.



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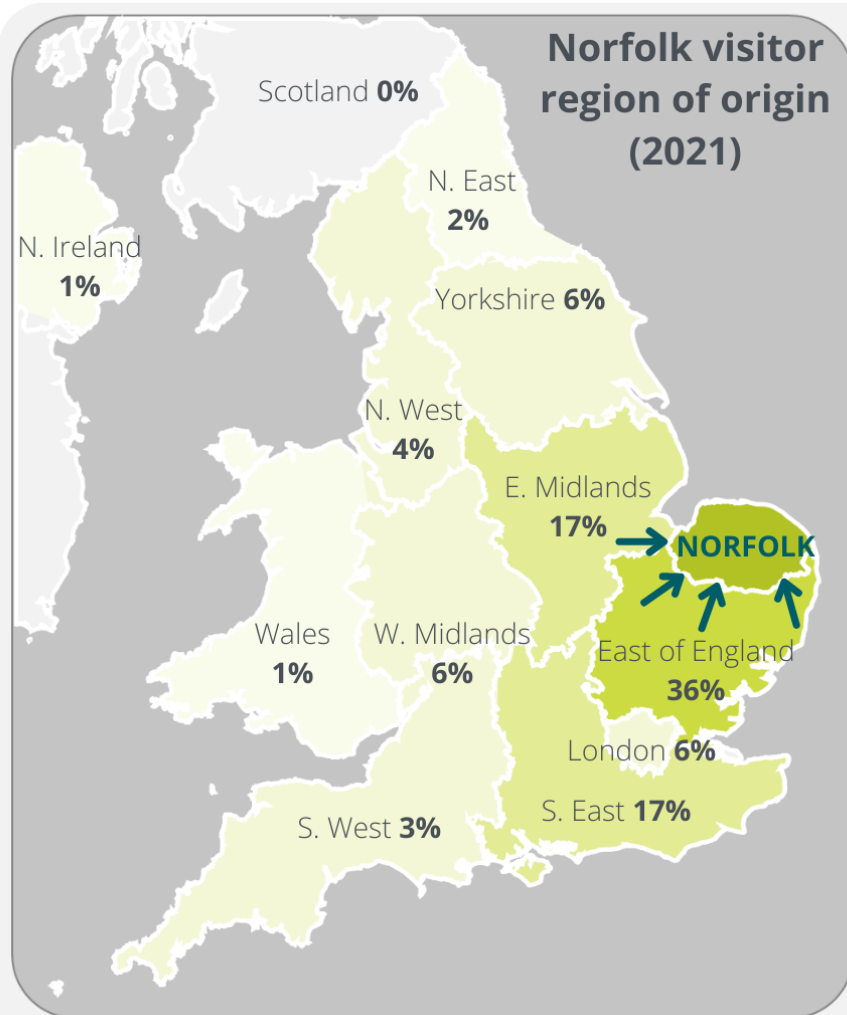
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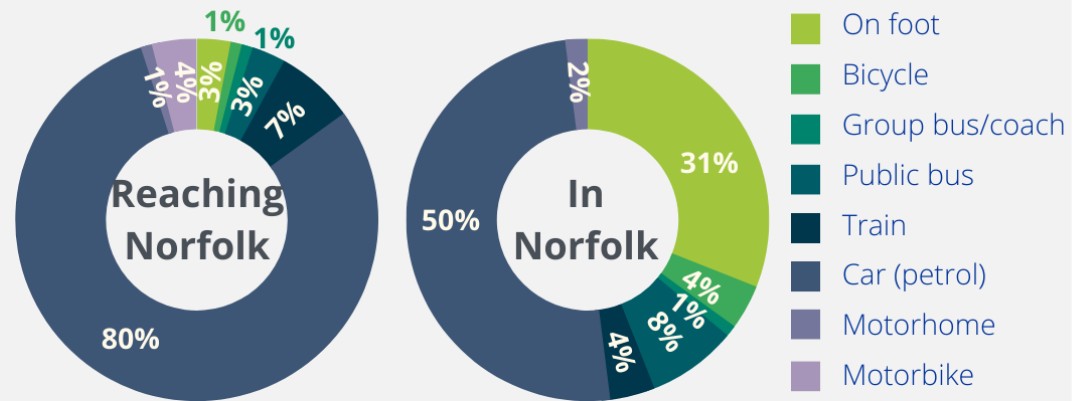
TOURISM IN NORFOLK: TRAVEL TRENDS

In 2021, more than a third of visitors to Norfolk arrived from local regions within the East of England and another third arriving from the East Midlands and South East, areas bordering the East of England, with the notable exception of London. Fewer visitors come from further afield in the UK. The vast majority of visitors arrive to Norwich in petrol-fuelled cars, though on average carrying 3-4 passengers. Once in Norfolk, car usage dramatically reduces in favour of more sustainable forms of mobility, especially walking.

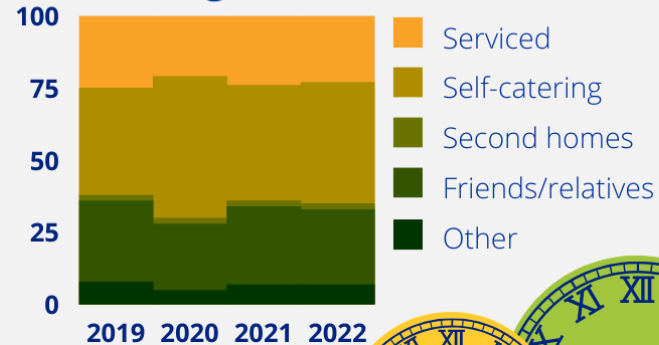


Data were provided by Destination Research Ltd.

Domestic trips to Norfolk by mode of transport (2020)



Overnight visitor accommodation



Social Performance (T5.2.3)

Until EXPERIENCE there was no information about how residents viewed the impacts of tourism on their local area. Issuing the Norfolk Residents Survey every summer and winter since 2020 has been a unique opportunity to capture valuable insights regarding the impacts of tourism on health and well-being (particularly during COVID-19) and on residents' sense of local pride and community. Monitoring residents' perceptions of impacts in these areas through surveys across the project lifetime, has allowed key trends to be identified to inform and guide the EXPERIENCE project approach in Norfolk. In the long term, support from residents is crucial for the success of experiential tourism development and endurance as it can influence strategies and plans set by local authorities as well as support funding bids.

EXPERIENCE project partner the University of Surrey developed the online survey script together with NCC, which was then distributed through NCC resident databases and shared by various social media channels, targeting Norfolk residents. Six waves of the surveys were circulated between September 2020 and January 2023, three in summer and three in winter. Respondents were incentivised by giving them the opportunity to be entered into a prize draw upon survey completion. Participation in the survey was completely voluntary and respondents were able to discontinue the survey at any point. Data collected was kept strictly anonymous and confidential. The survey was kept live for around one month and once closed the data were shared by the University of Surrey to NCC to be analysed for this evaluation.

For consistency, incomplete responses up to an agreed threshold were removed prior to analyses, totalling a sample size of 4,383 complete responses collected. Not all questions across the surveys were mandatory, therefore the sample sizes for individual questions can differ. In some cases, data are presented as mean averages taken across the six surveys. For simplicity in this evaluation, the responses in the agreement categories were consolidated i.e., "strongly (dis)agree", "(dis)agree", and "somewhat (dis)agree" were combined and represented by "(dis)agree" (or "(dis)agreed" and "(dis)agreement"). A similar consolidation of responses was performed during analyses for increase/decrease and improved/worsened response categories.

Demographic questions were asked of respondents so that responses could be further understood and segmented by gender, age, education level and

employment (**SEE: NORFOLK RESIDENTS SURVEY – DEMOGRAPHICS**). Across the six surveys two thirds of respondents identified as female, most respondents were in the 55 – 64 age category and one third were educated to undergraduate degree level. The majority share of respondents represented those who were retired (42%) and over half of the respondents were represented by combining the shares those in full-time and part-time employment.

Further demographic questions were asked relating to where the respondent's residence in Norfolk (**SEE: NORFOLK RESIDENTS SURVEY – AREA OF RESIDENCE**). There were about equal respondents (~40%) who had lived in Norfolk for a moderate to long time (5 – 25 years) and those who had settled in Norfolk for longer, perhaps living in the county for most or all their lives (25 years and over). Half lived in villages and around a quarter in towns. Across all the surveys about one quarter of respondents came from the district of North Norfolk and, over the project lifetime, responses collected proportionately represented the demographics of the county as a whole (**SEE: EXPERIENCE SURVEY RESPONSES**).

Across the six surveys, 15% of responses came from residents who work in the tourism sector (**SEE: NORFOLK RESIDENTS SURVEY – DEMOGRAPHICS**). There were high levels of support for Norfolk tourism in general, with the highest support for winter tourism (80%), demonstrating strong approval and a good audience for EXPERIENCE project activities. To that end, over 70% said that they would visit events or activities that have been developed for experiential tourism in the future (**SEE: NORFOLK RESIDENCE SURVEY OUTCOMES - EXPERIENCE PROJECT AWARENESS**). Given that only 8% of respondents had heard of EXPERIENCE project, due to project delivery delays caused by COVID-19, the enthusiasm for engagement is particularly encouraging, and ensures that continuation of the off-season tourism products developed and supported by the project is demand driven.

Some of the residents who completed the surveys had attended EXPERIENCE-supported events, most notably Norfolk Open Studios in 2021, which 20% of respondents had attended. While a mixed economy of advertising methods ensures widespread publicity of events and activities, promotion through social media seems to be the most effective means in generating awareness.



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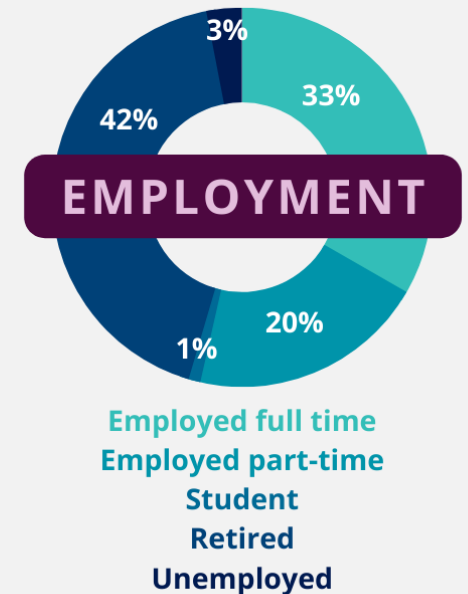
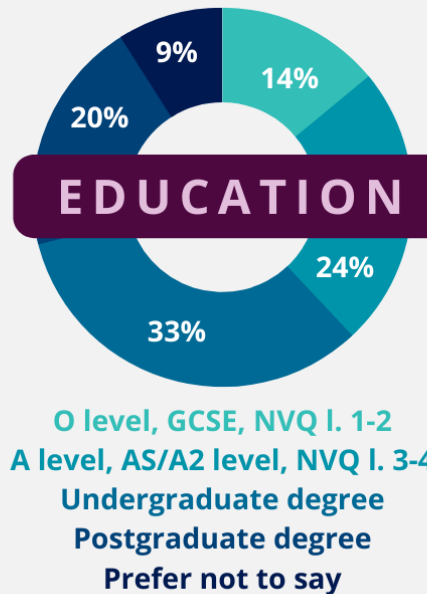
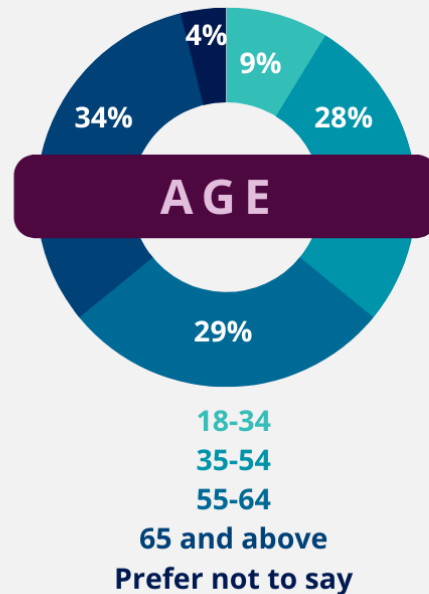
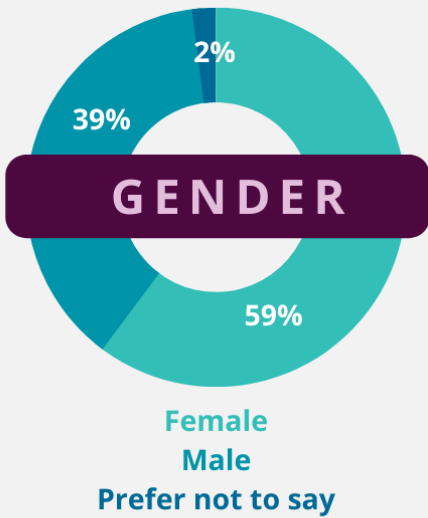
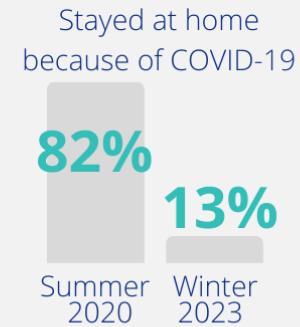
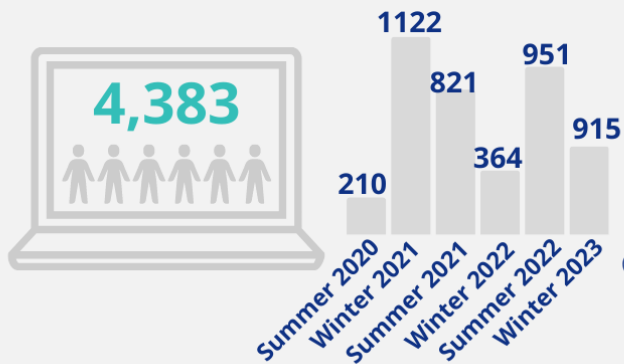
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NORFOLK RESIDENTS SURVEY: DEMOGRAPHICS

Demographic information averaged across 6 surveys reveal that on average almost two thirds of respondents identify as female, over 1 in 10 are over the age of 35, over half have higher education qualifications and over half are in either full or part-time employment. There was high support for year-round tourism, indicating as much of an appetite for tourism in the off-season as in the summer months. 2020 saw 8 out of 10 people stayed at home because of the COVID-19 pandemic, impacting both the domestic and international tourism industries.

Norfolk Residents Survey **respondents**



Data were collected and analysed by EXPERIENCE.



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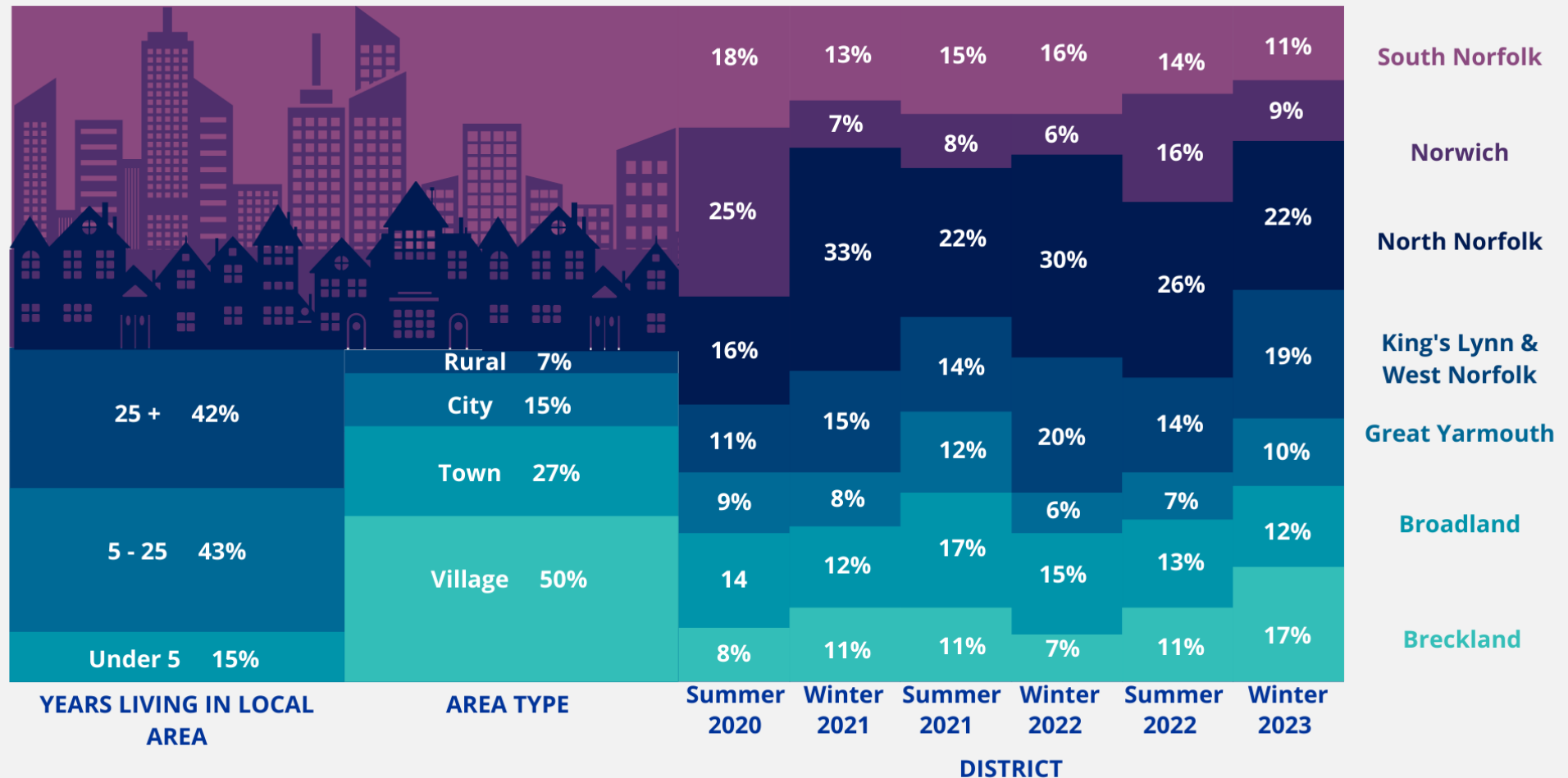
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NORFOLK RESIDENTS SURVEY: AREA OF RESIDENCE

Residents well-representing all Norfolk districts completed the surveys with some variability noted in the number of surveys completed from the city of Norwich. People living in villages contributed half of the responses. 85% of respondents were mid- to long-term residents, a major target group for EXPERIENCE. Creating tourism offer that attracts more local visitors represents a sustainability practice that can help decarbonise the tourism industry by minimising the environmental impacts caused by travel.

SURVEY RESPONDENTS RESIDENCE IN NORFOLK



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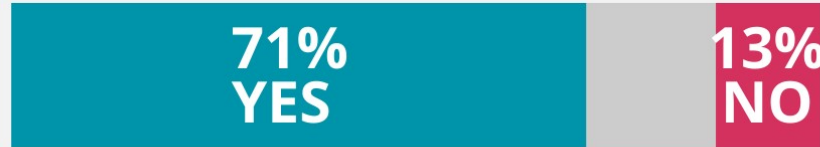
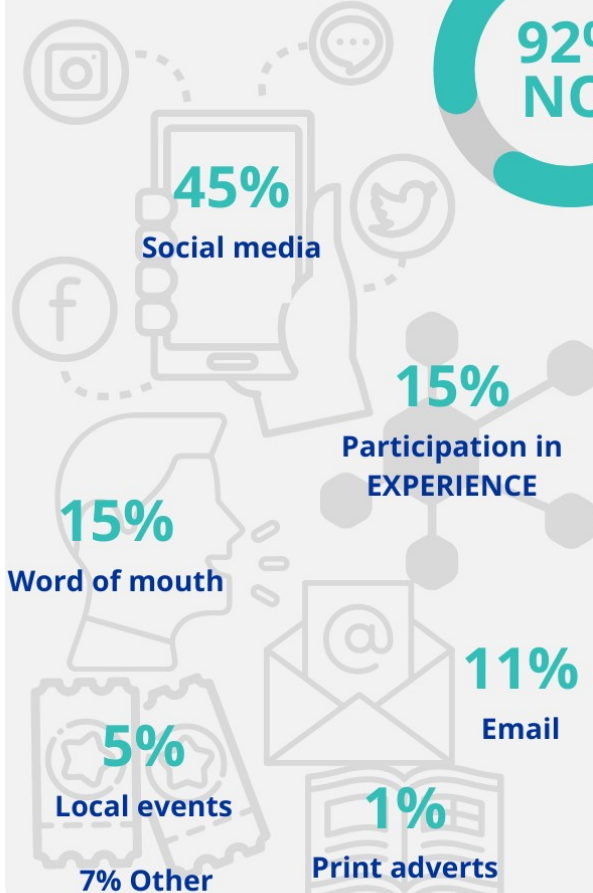
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NORFOLK RESIDENTS SURVEY OUTCOMES: EXPERIENCE PROJECT AWARENESS

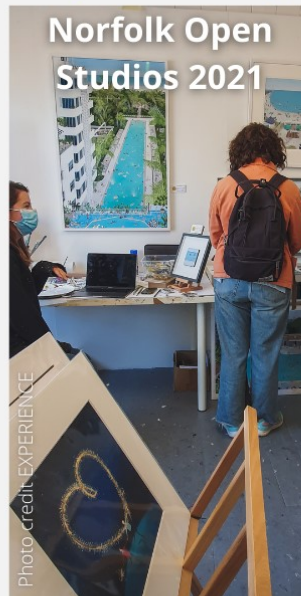
Off-season tourism offer delivered by EXPERIENCE could only commence from September 2021 due to the impacts of COVID-19, resulting in poor awareness about the project. With the continued delivery EXPERIENCE-supported events, infrastructure, art trails and the new BeNorfolk website, we are confident that Norfolk will recover lost tourism with inspiring experiential activities and itineraries, the development of which has high levels of local support.

How did you become aware
about EXPERIENCE?



It is likely that I would visit events or activities in Norfolk that
have been developed for 'experiential tourism' in the future

Have you visited or participated in any of the following events associated with EXPERIENCE?



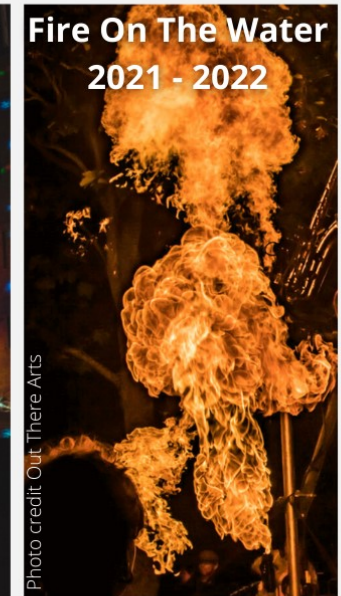
20%



7%



8%



5%

Data were collected and analysed by EXPERIENCE.

Residents were asked to rate the popularity of several local attractions. Across the six surveys Norfolk's coast and beaches was consistently voted as the top attraction, with over half the share of responses each time (**SEE: NORFOLK RESIDENTS SURVEY – LOCAL ATTRACTIONS**). When prompted to name any additional Norfolk associated with their local area, the Norfolk Broads was consistently the most popular answer followed by water activities such as boating and visiting Norfolk's rivers. Visiting the countryside, Norfolk's wildlife, walking, and cycling were amongst the most popular things to do in Norfolk.

There is very high regard amongst residents for Norfolk's natural assets and recognition of their popular appeal for visitors. Threats to the environment stemming from increased visitor volume e.g., increased, litter, road congestion and its associated pollution, are their biggest concern (**SEE: NORFOLK RESIDENTS SURVEY OUTCOMES – NEGATIVE IMPACTS OF TOURISM ON LOCAL AREA**). Norfolk residents strongly believe they live in a beautiful area and the over half feel that their local area is tranquil, peaceful, and calm (**SEE: NORFOLK RESIDENTS SURVEY OUTCOMES – TOURISM IMPACT ON ENVIRONMENTAL PERFORMANCE**). While residents strongly agree that tourism preserves historic buildings and monuments, they do not feel as much is done to protect and enhance the natural environment. Interestingly, fewer residents believe winter tourism is harmful to natural places than summer, highlighting why the EXPERIENCE approach to sustainable, experiential off-season tourism is an important model that can help protect the environment and safeguard Norfolk's natural assets for future generations to enjoy.

Residents perceive Norfolk's popularity as a tourist destination as having some negative economic impacts for them such as lack of parking and raising house and rental prices and availability (**SEE: NORFOLK RESIDENTS SURVEY OUTCOMES – NEGATIVE IMPACTS OF TOURISM ON LOCAL AREA**). Most residents feel financially secure living in Norfolk during the EXPERIENCE project lifetime, though this feeling of security and the state of household finances has declined since summer 2022, likely brought on by increases to the cost of living rather than as a result of tourism (**SEE: NORFOLK RESIDENTS SURVEY OUTCOMES – TOURISM IMPACT ON ECONOMIC PERFORMANCE**). As discussed earlier, the negative economic impacts are balanced by a recognition that tourism has positives – 9 out of 10 residents agreed that tourism improves the local economy and employment opportunities. Supporting this further, when residents were prompted to freely give their

opinions as to the positive impacts of tourism an incredible 76% commented on how tourism has positive impacts on the economy through providing job opportunities to helping local businesses (**SEE: NORFOLK RESIDENTS SURVEY OUTCOMES – POSITIVE IMPACTS OF TOURISM ON LOCAL AREA**). Taken together, there is strong public support for tourism, particularly in the winter which could alleviate the burden of summer tourism for locals. The activities of EXPERIENCE in the region laid the groundwork for adapting and creating the business networks and infrastructure required to support off-season tourism gathering vital encouragement and endorsement from locals, visitors, and businesses along the way.

The Norfolk Residents Survey tracked impacts of tourism on general health and wellbeing. 9 out of 10 residents agreed that they liked living in Norfolk and felt personally safe living here (**SEE: NORFOLK RESIDENTS SURVEY OUTCOMES – TOURISM IMPACT ON SOCIAL PERFORMANCE**). The majority felt that either summer or winter tourism will not make them move away from their local area, though agreement with this sentiment declined slightly since summer 2021. There were fascinating dynamics in residents agreeing to “liking to invite tourists into their own homes”, where initially less than 10% agreed, dramatically shifting to over 60% agreement from winter 2021, and remaining high since. This is perhaps linked to the pandemic, where maintaining social distancing was paramount to protect lives during national lockdowns in 2020 – 2021 (**SEE: EXPERIENCE – NORFOLK DELIVERY MILESTONES** for COVID-19 lockdowns with respect to EXPERIENCE project delivery).



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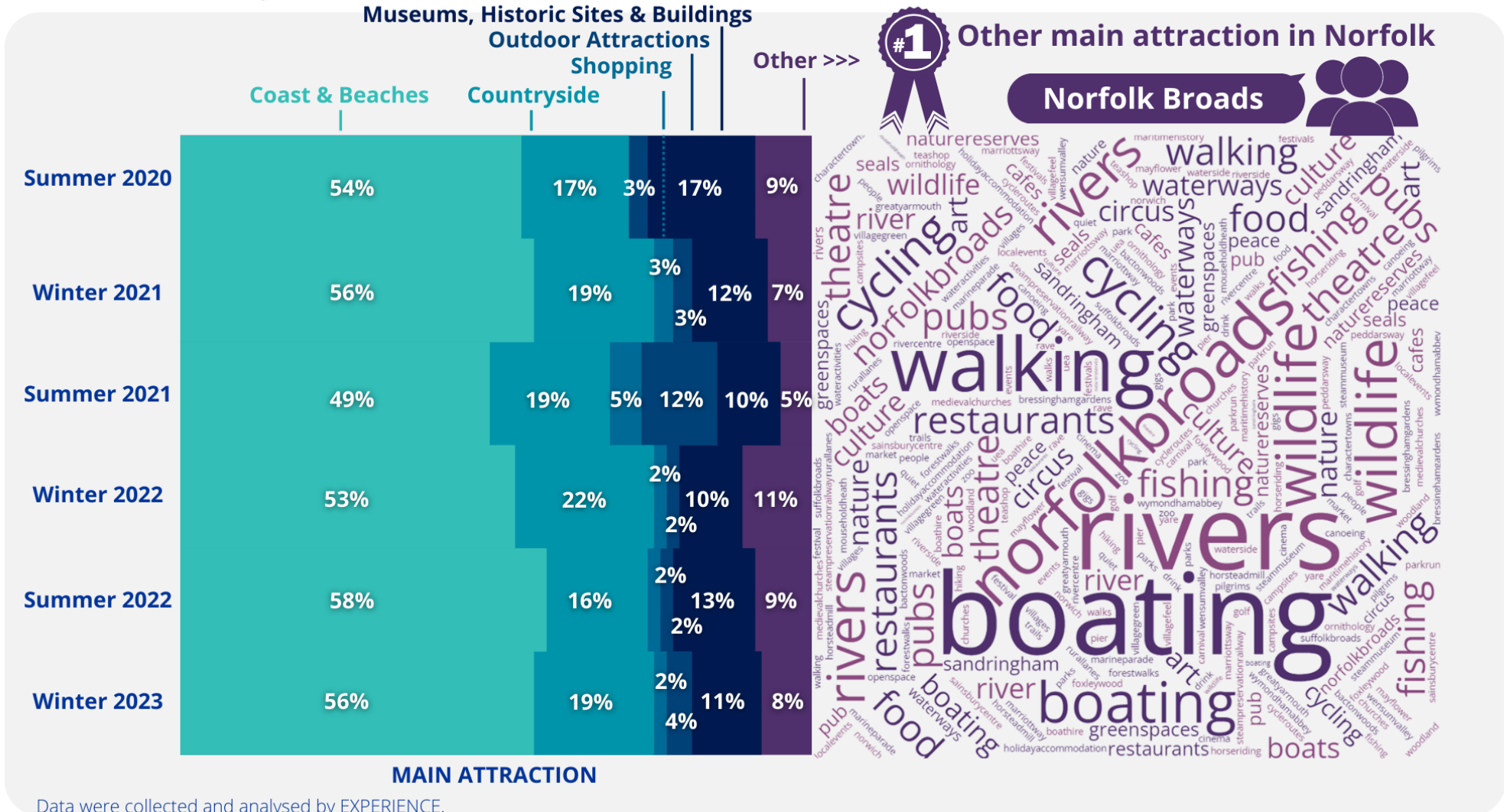
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NORFOLK RESIDENTS SURVEY: LOCAL ATTRACTIONS

The Norfolk Coast, renowned as a UK Area of Outstanding Natural Beauty, was consistently selected as the main regional attraction in each survey. Shopping and outdoor attractions were not perceived as main regional attractions, indicating areas for future growth and development in the region. When prompted to identify other popular regional attractions, the Norfolk Broads repeatedly came out on top. As Britain's largest protected wetland, The Broads is a unique destination for locals and visitors to include in their travel itinerary.



Data were collected and analysed by EXPERIENCE.



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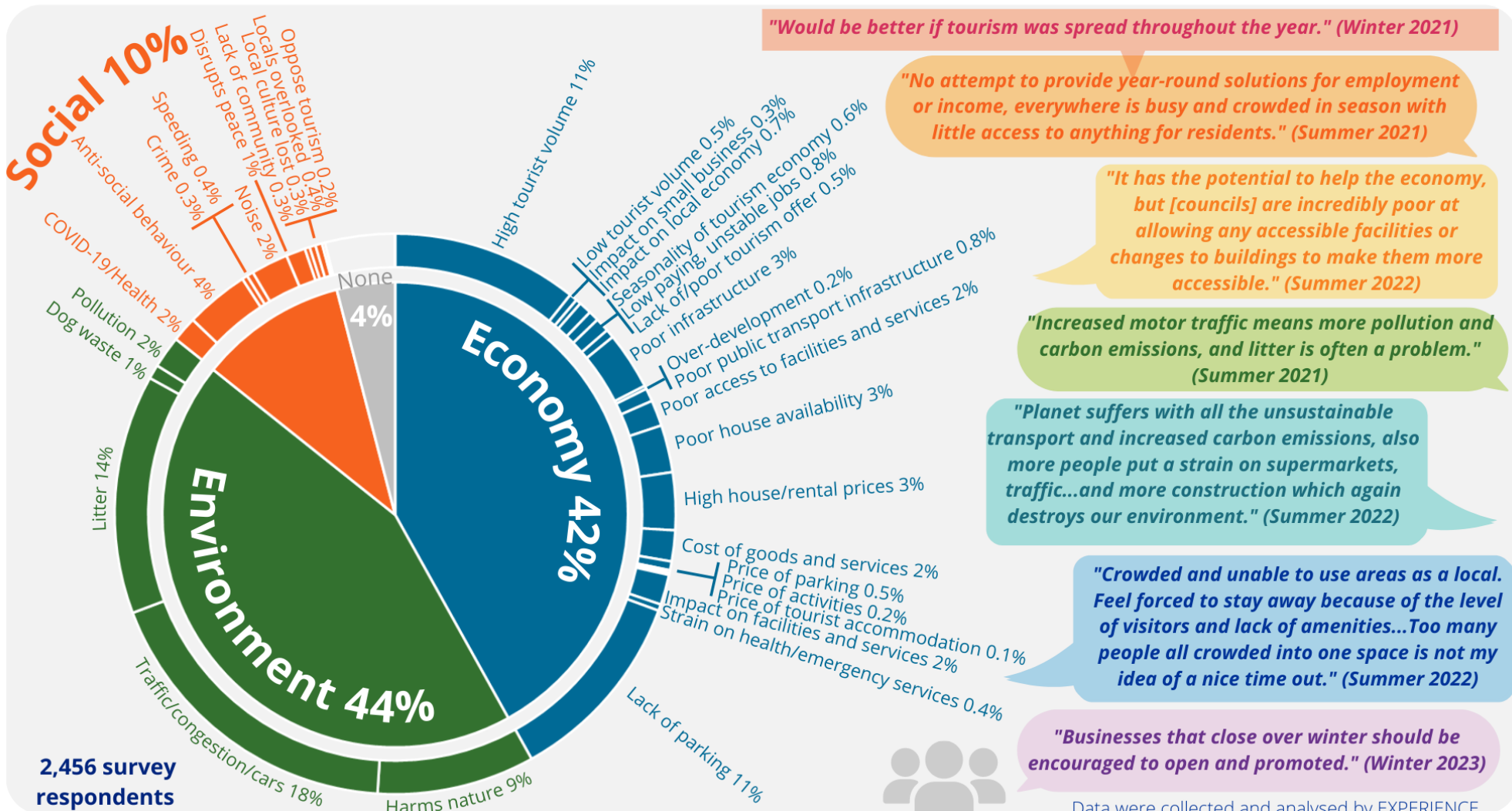
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NORFOLK RESIDENTS SURVEY OUTCOMES: NEGATIVE IMPACTS OF TOURISM ON LOCAL AREA

When prompted to offer opinions on the negative impacts of tourism on their local area, a large number commented on the high volume of tourists and the lack of parking. While these points have economic significance, they also have environmental implications, relating to the major concern of cars and congestion. EXPERIENCE practices that extend tourism into the off-season would even out tourism through the year alleviating some of the burdens caused by traffic.



Data were collected and analysed by EXPERIENCE.



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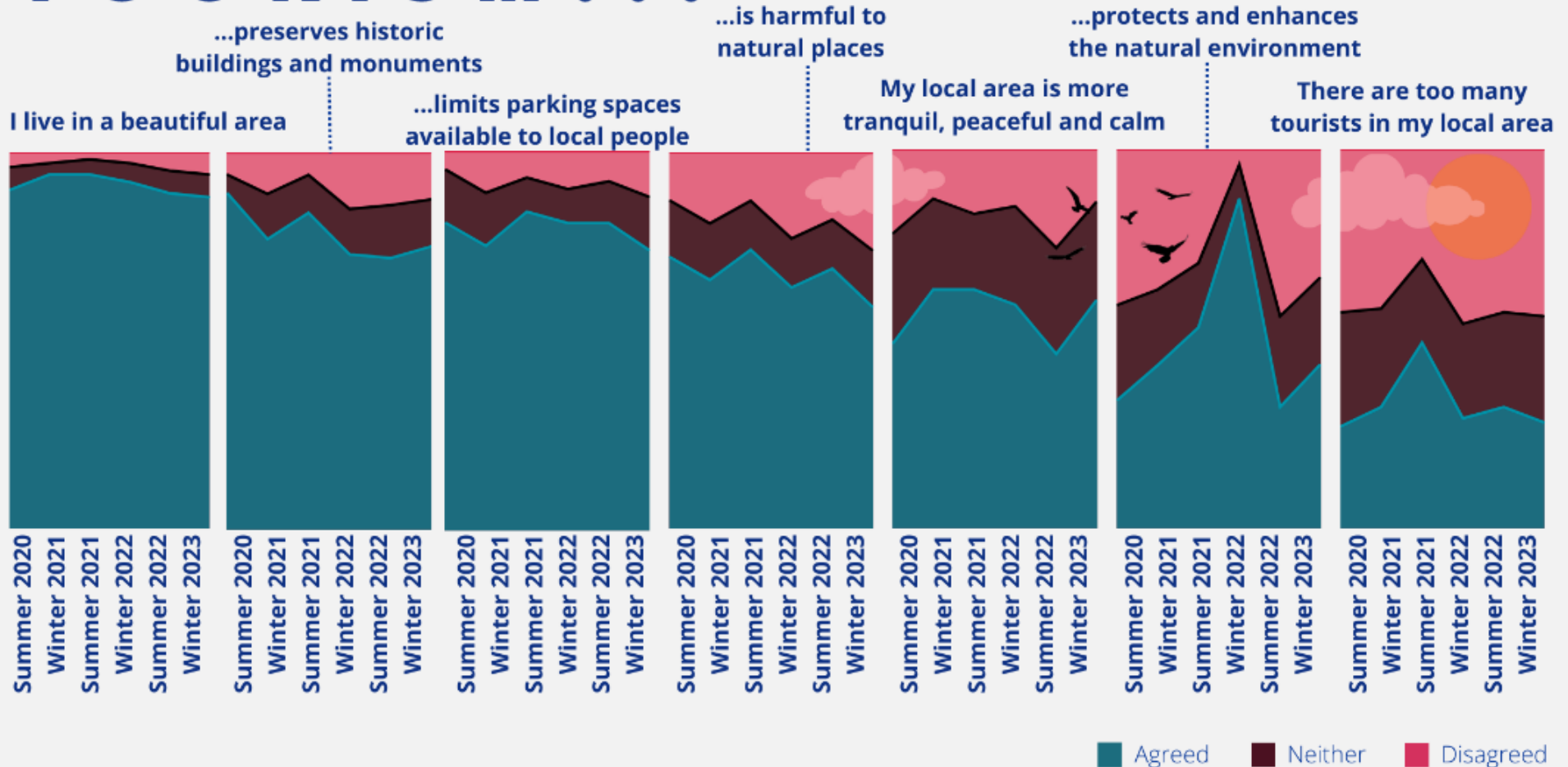
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NORFOLK RESIDENTS SURVEY OUTCOMES: TOURISM IMPACT ON ENVIRONMENTAL PERFORMANCE

There are high levels of concern from residents about the perceived harm tourism has on natural places, notably higher when surveyed in the summer months than in winter. This somewhat mirrors perceptions around parking availability for locals and reiterated in the survey when residents are asked to offer their comments on the negative impacts of tourism. Nevertheless, Norfolk is consistently regarded highly as a beautiful area to live in.

T O U R I S M . . .



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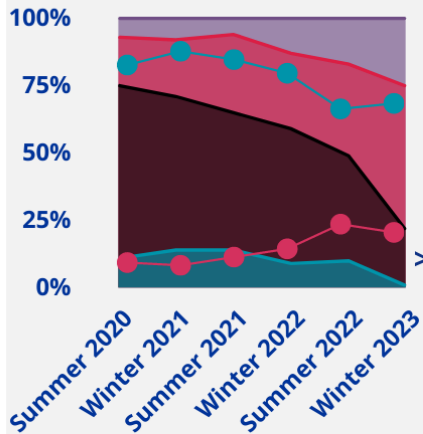
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NORFOLK RESIDENTS SURVEY OUTCOMES: TOURISM IMPACT ON ECONOMIC PERFORMANCE

Repeated rounds of surveys offers unique insights as to the evolving perceptions around the impact tourism has on the regional economy. Residents overwhelmingly and consistently agree that tourism improves the local economy and employment opportunities, and both are judged to be improving since 2020 by around a third. While COVID-19 did not have a major impact on household finances there is a recent growing sense of financial insecurity.

IMPACT OF THE COVID-19 PANDEMIC ON...

...Household finances (shaded area)



...Perceptions about local tourist economy



Improved +27% Summer 2020 to Summer 2022

...Perceptions about work opportunities from tourism



Improved +33% Summer 2020 to Summer 2022

>>>>> I feel **financially secure** living here (left, circles)

T O U R I S M . . .



90%





AGREED

Tourism improves the **local economy**

87%

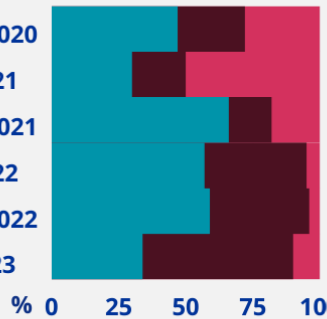
AGREED

Tourism improves **employment opportunities**

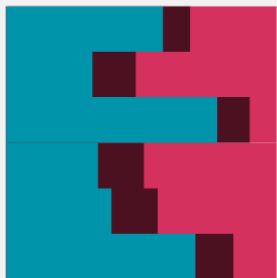
-  Improved/Increased/Agreed
-  Stayed the same/Neither
-  Worsened slightly/Decreased/Disagreed
-  Worsened significantly

Perception of **tourist numbers**

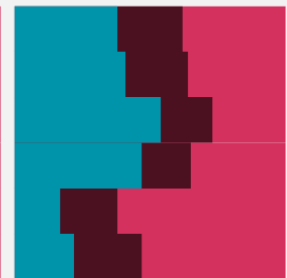
Summer 2020
Winter 2021
Summer 2021
Winter 2022
Summer 2022
Winter 2023



...improves local **transport facilities**



...increases **availability** of local **recreation facilities**



Perception of **recreation facility availability**



...improves local **investment, development and infrastructure spending** in the economy

% 0 25 50 75 100

25 50 75 100

25 50 75 100

25 50 75 100

25 50 75 100

25 50 75 100

...increases **prices** of local **recreation facilities**

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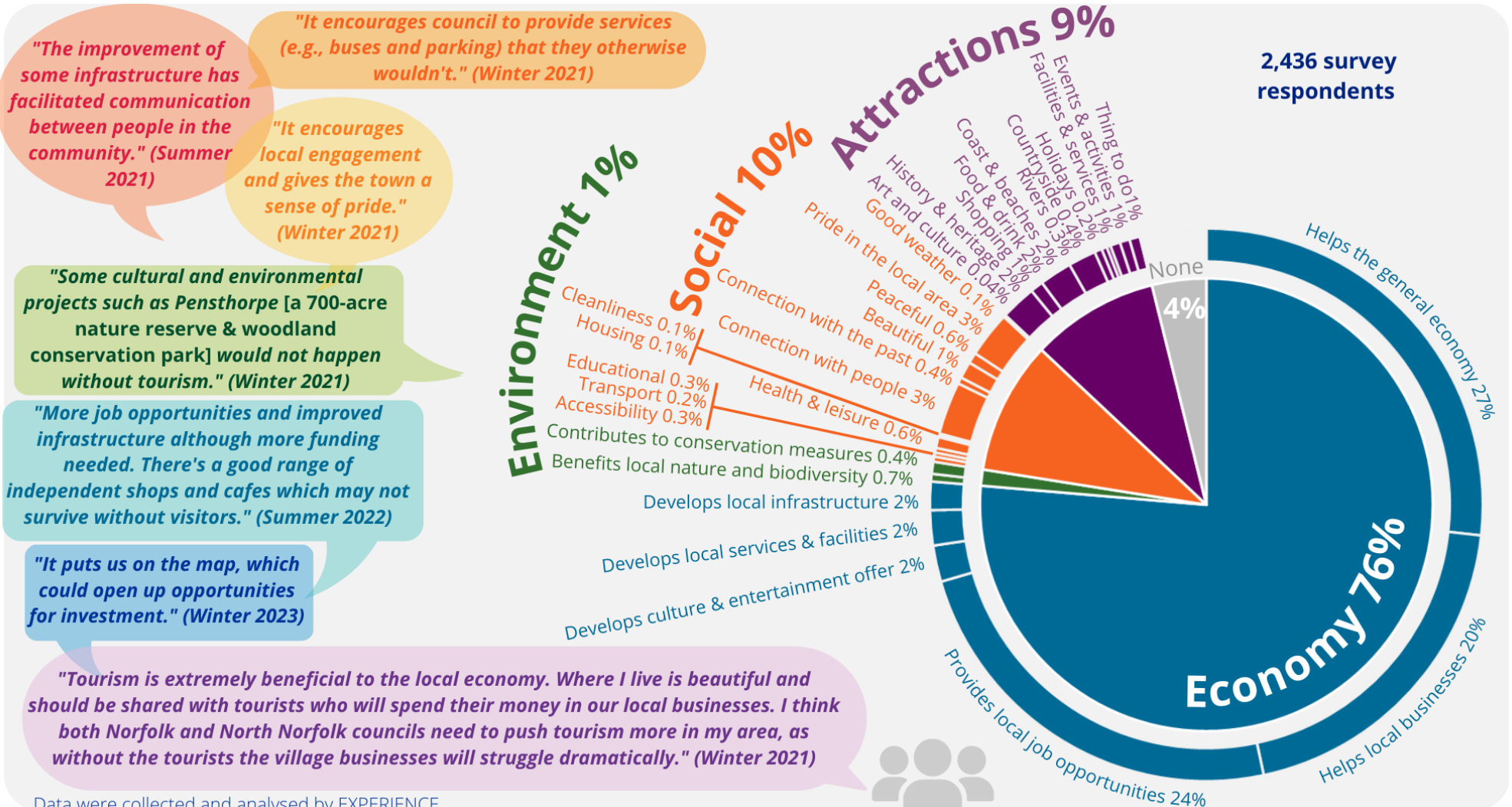
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NORFOLK RESIDENTS SURVEY OUTCOMES: POSITIVE IMPACTS OF TOURISM ON LOCAL AREA

When prompted to offer thoughts on the positive impacts tourism has on their local area, the majority of residents highlighted the valuable contributions tourism has on the local economy, recognising the significant impact this has on local businesses and provision of local job opportunities. Connection with people and pride in their local area stand out as being positive indicators of social performance.



Data were collected and analysed by EXPERIENCE.



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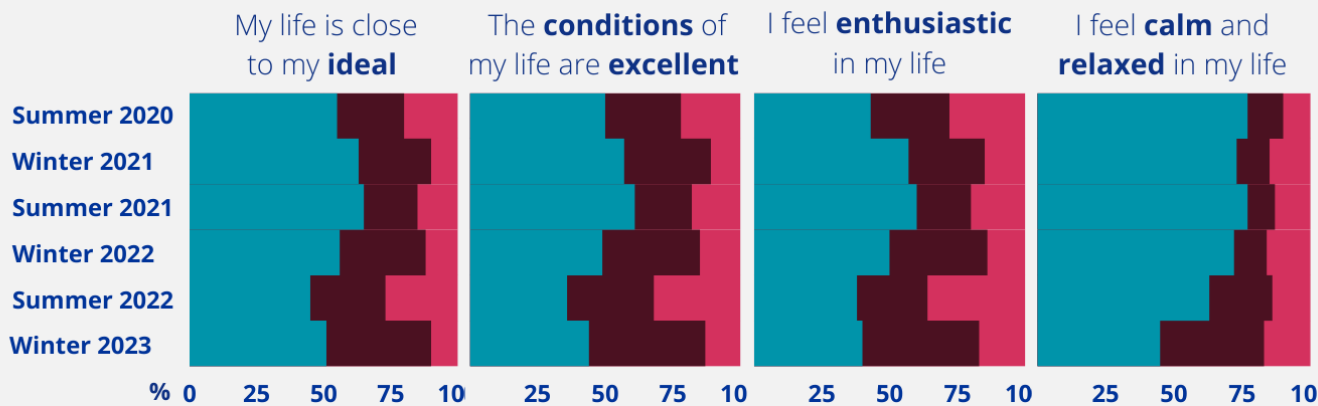
European Regional Development Fund



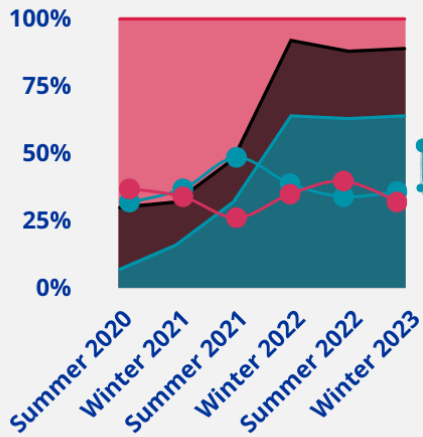
NORFOLK RESIDENTS SURVEY OUTCOMES: TOURISM IMPACT ON SOCIAL PERFORMANCE

Connections to people and local surroundings are key contributors to an overall positive sense of social health and well-being. While there was peak in residents' mood following COVID-19 restrictions, recent surveys show a drop in residents life ideals and conditions, enthusiasm and sense of calm. Notably, there has been a strong surge of residents liking the idea of inviting tourists into their own home and a strong, continued sense of personal safety living in Norfolk.

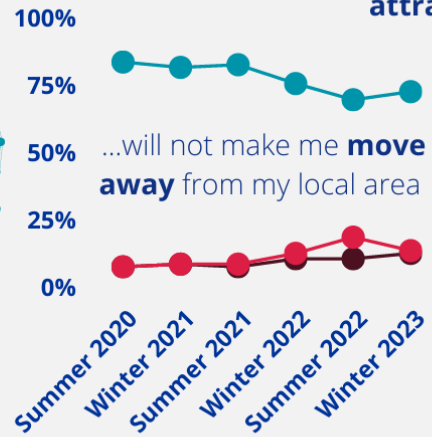
IMPACT OF SUMMER/WINTER TOURISM ON WELLBEING



I like to invite tourists into my own home

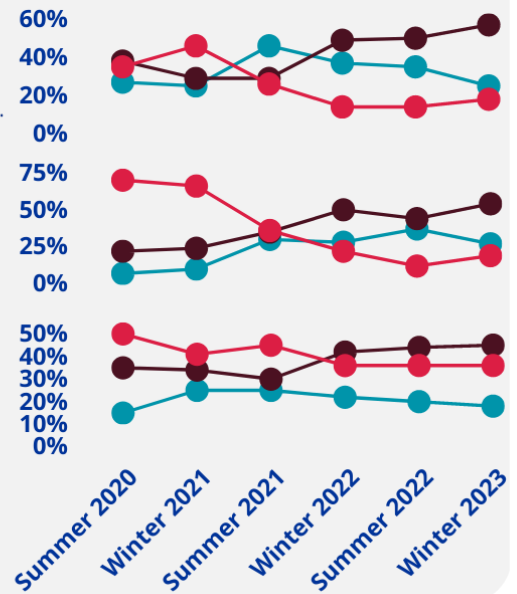


Summer/Winter tourism ...



Locals using local attractions and facilities...

Cultural attractions available to visit...
Given the impact Covid-19 had on local tourism, the quality of life for local residents has...



Data were collected and analysed by EXPERIENCE.

Agreed/Increased Neither Disagreed/Reduced

If Norfolk seeks to boost revenue generated through increased tourism it is important that this is not at the expense of locals. Appropriate provisions are required to deal with increased volume, particularly in the areas of transport infrastructure and pricing of facilities, such that these do not become out of reach for residents, inciting resentment towards tourism and tourists. The responses and engagement from residents have been incredibly thoughtful, constructive, and encouraging. NCC has captured important performance metrics to support future tourism-related projects in Norfolk and the insights provided can be integrated into ongoing planning and green infrastructure initiatives. EXPERIENCE's holistic approach to project development and performance evaluation demonstrates a commitment to ensuring the off-season, experiential tourism model provides viable economic stability, environmental sustainability, and lasting societal acceptance.

- ✓ Where performance evaluation is dependent on data from a wide range of sources, appointing a data analyst to manage data collection from the start of a project is very important. They can determine data availability and compatibility across the whole project, identify data gaps and strategize data collection during the project lifetime.
- ✓ It is important to be clear about what data are needed, and how often metrics should be measured, striking the right balance between not enough data and too much.
- ✓ Engaging a tourism data consultant saves time as they can provide specialist knowledge of different datasets across the tourism sector, comparative information from different countries and the skill to perform relevant analyses. Appointment from the beginning would mitigate the impact of knowledge lost from staff turnover as a consultant would likely remain for the project lifetime.
- ✓ When contracting a data specialist, it is best to provide a list of the data requirements so that it is clear what can and cannot be achieved from the start and helps manage expectations on both sides.
- ✓ Social media advertising of the Norfolk Residents Survey dramatically increased survey visibility and response rate.
- ✓ Survey completion was incentivised by including a prize draw where a respondent was chosen at random to receive a voucher.