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North Norfolk Cultural Tourism Feasibility Study

An analysis of how culture and tourism can drive economic growth in North Norfolk.

September 2024

Contents

Quotes included in this report are verbatim comments from the interview consultations and workshops.

Cover image: North Norfolk Open Studios

Executive Summary

This study was commissioned by North Norfolk District Council to identify the extent to which culture and tourism are drivers for economic growth in the district. We have identified several areas of existing strength to be developed, and potential areas where economic growth could be strategically developed.

This report sets out the case in detail – **but the headline findings are:**

Tourism is a vital part of the North Norfolk economy.

North Norfolk's tourism economy is worth **£512m a year.**

Cultural Tourists spend **266% more** than other types of tourists See p32

780 creatives are living and working in North Norfolk

There are at least **184 cultural organisations** in North Norfolk See p13

Investment & interventions in North Norfolk deliver results.

North Norfolk Studios open event generated up to **£915,000** in a fortnight. See p32

North Walsham HAZ project cultural events delivered: - **50% more** footfall See p40

67% of attenders would visit again .

79% spent money in businesses on the high street.

Culture & creative industries are a key cluster in the North Norfolk economy.

The cultural sector contributed **£272m** to Norfolk and Suffolk in GVA. See p12

North Norfolk cultural economy generates **£38.4k** GVA per head. See p16

North Norfolk is currently failing to capitalise on its true cultural tourism potential.

Investment in North Norfolk cultural sector is significantly behind

North Norfolk is a Levelling Up For Culture Place See p19

A1. Introduction

WHY DO PLACES SUPPORT AND INVEST IN ARTS AND CULTURE? WHAT IS THE PURPOSE OF THIS FEASIBILITY STUDY?

Norfolk and East Anglia has prioritised the development of the culture, heritage and tourism sectors over the past decades. Great progress has been made since the first Cultural Tourism strategy for New Anglia region in 2012, with increased investment, educational excellence, sustained growth in creative GVA just a small sample of the outcomes. International accreditation of Norwich as a UNESCO City of Literature cements what Norfolk already has a strong reputation for; being a destination of choice for living creative lives, forging creative careers and experiencing cultural tourism.

And it has been for millennia. The oldest evidence of human life in Northern Europe has been found in North Norfolk. The importance of North Norfolk's landscape is evident through the presence of national agencies such as the National Trust, RSPB, English Heritage, National Trails, and an abundance of Dark Sky Discovery Sites, national Nature Reserves, AONBs and SSSIs. Culture's close relationship with landscape, heritage and tourism make it a key economic driver.

It's not just in North Norfolk. Culture and heritage has been behind the growth of the global tourism economy, influencing product development, destination choice and yielding direct visitor spend for decades. The global cultural tourism revenue is currently around US$ 5,931m (£4.465bn) and set to reach around US$ 22,772m (£17.144bn) in 2033[1]. The UK performs exceptionally well as an international cultural powerhouse, with culture-heritage the no.1 motivation for international visitors (VisitBritain) and a key driver for domestic tourism.

So, despite the challenges of the pandemic and cost of living, UK tourism economy is now generally running ahead of 2019 levels although the East of England is still behind, and arguably not getting its share of higher spend overnight visitors compared with comparative regions.

Proportion of visit types	East of England	South West
	2023	2023
Overnight stays	23%	39%
VFR	55%	45%

Source: ONS

Indeed, destinations around the UK are actively competing to develop their offer and target high spending cultural tourists – witness what is taking place in nearby Margate, Folkestone, Great Yarmouth and Lowestoft. Cultural tourism is not just the preserve of the established cultural centres like Aldeburgh or Norwich – but a major part of place regeneration and vibrancy.

[1] Estimates taken from www.futuremarketinsights.com/reports/cultural-tourism-market in USD and converted to GBP using the exchange rate on 19.09.2024.

In doing so it is responding to a significant amount of data confirming that travellers actively seek out destinations which offer culture-rich experiences, where they feel their needs to explore, engage and learn will be met. These attractions are related to the various arts and heritage offers in terms of art, music, literature, cultural heritage, landscape and lifestyle.

This type of tourism is also very values-driven and socially and environmentally responsible. A very recent published study for Tourism Northern Ireland[2] (a highly successful cultural tourism destination) draws on trends data to show how cultural tourists are increasingly seeking more rural, natural destinations. They want meaningful experiences and:

- Be immersed in the landscape, towns and heritage infrastructure;
- Connect with communities, meet artists and makers, and uncover local experiences such as events and festivals;
- Understand where they are and help conserve and preserve;
- Follow 'experiential' routes and trails;
- Be active in the outdoors, and enjoy local food, drink and hospitality;
- Pursue wellness and self-discovery.

And technology is driving growth at an even faster rate – allowing us to engage with and immerse ourselves in destinations before we visit, enjoy digital experiences and facilitate quality operational interactions and transactions.

But what does all of this mean specifically for North Norfolk's economy? How do the tourism, cultural and creative industries contribute to the economic success of the district, and to the sense of place in its towns and villages? And how can these measures be further developed, to drive growth and value for the local economy?

Successful destinations are those which recognise the demand and develop themselves accordingly. Arguably North Norfolk is in a great position to respond more effectively than it currently does to some or all of these trends and opportunities given strong foundations in its heritage, coastal and rural landscape, network of attractive towns and villages and its cultural and creative product mix. For example: a recent National Lottery Heritage report states that 3 in 5 adults have visited a heritage site in the last 12 months, that 35% of UK citizens agree that the presence of culture and heritage positively influences their choice of destination and that historic houses (of which North Norfolk has several) have enabled 21 million visitors engage with 26,000 cultural experiences.

"Truly successful places are much more than economic powerhouses. Their high levels of performance are always underpinned by a sense of creative vibrancy, a manifestly strong quality of life, and a clear sense of cultural identity."
New Anglia LEP, Culture Drives Growth

[2] https://www.tourismni.com/globalassets/business-development/event-industry-support/upcoming-events/2023/eags-roadshow/culture-and-heritage/culture-heritage-insights-july-2023.pdf

A2. How did we go about it?

A2.1 OUR APPROACH IN SUMMARY

Stage 1 – Establishing the evidence base

The mechanics of the research & analysis phase will be familiar to many. But the questions we frame within the methodology are where we seek to generate additional insight. To build a robust appraisal of the current and potential situation, we have undertaken a number of specific review strands:

- A number of visits, including site tours and meetings with key stakeholders and interesting independent voices;
- A sentiment analysis of the area and its component parts – providing an overview of awareness and attitudes to it;
- A review of relevant cross-cutting local, regional and national strategies that shape how North Norfolk coordinates, presents itself and advocates;
- Mapping of place brand-led provision and communications – North Norfolk District Council (NNDC), Norfolk County Council (NCC), LEP and other key agencies, and acknowledging wider networks and supply chains;
- A set of audit exercises to curate findings – situational analysis.

This analysis is the collated and curated evidence base for the insights and recommendations to follow.

Desk research comprised a range of analytical tools and areas of focus:

- Sector asset mapping and analysis;
- Funding mapping and analysis;
- Demographic data analysis;
- Key word mapping and analysis;
- Policy review (local, regional, national);
- Market trend forecasting;
- Situational analysis;
- Sentiment analysis;
- Economic impact analysis;
- Town centre animation review;
- Comparator and case study review.

A bibliography is included in the Addendum.

Stage 2 – Stakeholder engagement

In addition to the extensive desk research, a targeted engagement programme has been undertaken to identify, explore and test emerging themes and priorities arising from mapping and a needs / gap analysis.

We have conducted a targeted series of one-to-one stakeholder consultations to explore a number of influencing issues from a sub-regional, more local / cluster and also organisational context. Through this we have the potential to chart a clear and evidence-based route that has the potential for stakeholder and partner representation and buy-in.

A full day in-person visit proved to be invaluable, including key site visits and depth conversations with officers of NNDC alongside wider stakeholder engagement.

Places visited

- Walsingham – Our Lady of Walsingham, National Centre of Pilgrimage
- Cromer – Cliftonville Hotel, No1 Fish & Chip Shop, Pier, Museum, TIC and the Deep History Coast exhibition
- Sheringham – Little Theatre, Museum, The Reef

Individuals met from the following organisations

- NNDC
- Cromer Pier.
- Sheringham Museum.
- The Reef.
- Visit North Norfolk.
- Sheringham Little Theatre.

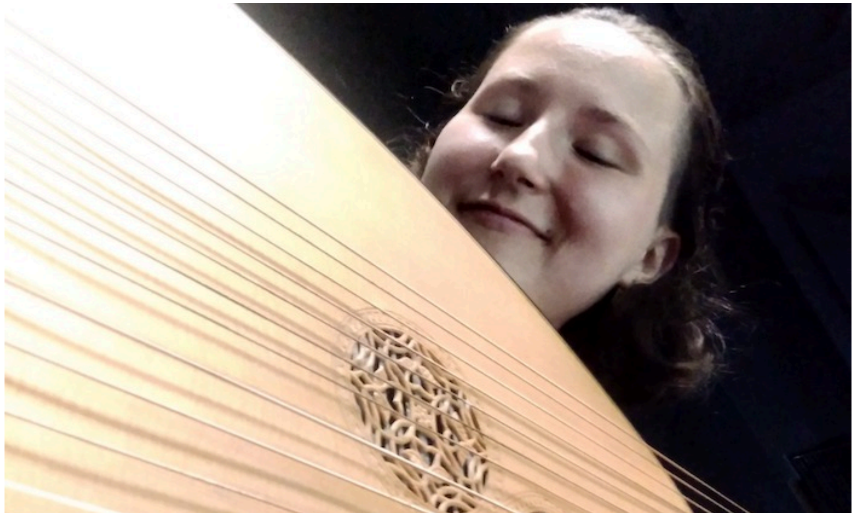
Direct consultations

10 x individual / small group stakeholder conversations representing the following organisations:

- The Belfry, Overstrand.
- Cromer Art Space.
- Norfolk County Council.
- Norfolk Open Studios.
- Friends of Cromer Museum.
- Norfolk Music Hub.
- Head East.
- Arts Council England.
- Norfolk Museums Service.
- Wells Maltings.

A2.2 CASE STUDY

The Belfry: community-focused, quality offering



Since 2016, The Belfry has provided exceptional quality music performance and participation opportunities for local people. Initiatives such as The Overstrand Festival of Early Music and International Lute Competition, which runs for five days across 5 venues in North Norfolk, demonstrates the level of ambition of the centre – and brings sell-out audiences from.

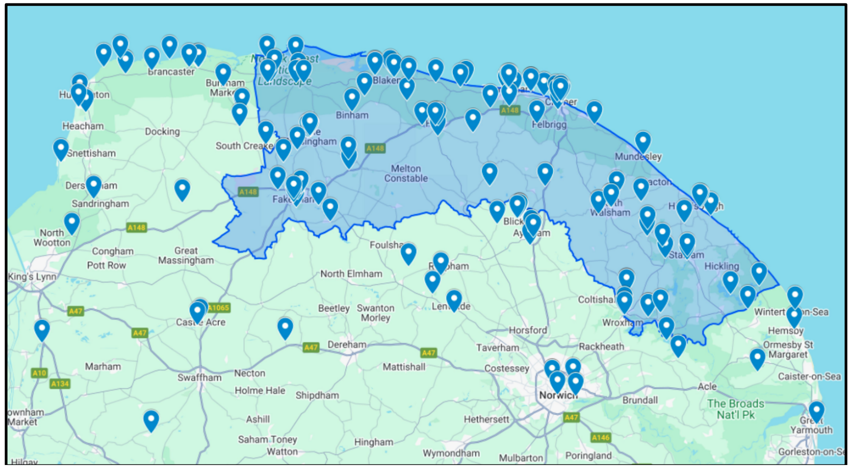
But any profits from the programme support the loan and tuition of musical instruments to local children, and the space is used for various art classes and community wellness programmes.

B1. Scale and scope

WHAT IS THE SCALE AND SCOPE OF TOURISM ASSETS IN NORTH NORFOLK, AND HOW DOES CULTURE & HERITAGE FEATURE?

B1.1 OVERVIEW

To get an understanding of the general scale, scope and relevance of the tourism offer in North Norfolk, we have mapped 184 venues / assets across the cultural and tourism sectors, using listings data taken from Visit North Norfolk website.



Drilling into the data we can see that:

- Of the total assets, the largest category, just over half (95), are outdoor assets and/or landmarks such as beaches and nature reserves.
- The second largest category is heritage sites, historic houses and museums.
- 42 are located outside of the North Norfolk District boundary, for example those which lie on the Norfolk Coastal Trail or in settlements such as Aylsham and Norwich.
- 57 are paid entry, which is 31% of the total (given that 51% are typically free to access such as beaches and nature reserves, this is a good number).
- Only 4 conurbations have assets reaching double figures (this figure includes bordering Aylsham which Visit North Norfolk features on its website due to its appeal to and movement of visitors).

Cromer	19
Aylsham*	15
Fakenham	15
Hoveton	10

Stakeholders are confident of the offer – and also realistic about the capacity and capabilities:

"We're just geographically spread out over a wider area. North Norfolk has nothing of poor quality. We're better quality, pound for pound, in virtually every aspect than Devon or Cornwall."

"North Norfolk District Council are really good but under-resourced, under gunned, under capacity."
Stakeholder comments

B1.2 KEY INSIGHTS

Taken together the mapping findings paint a picture of a cultural heritage sector which delivers significantly to the tourism economy and the wider economy as well as resident life. This is an important and desired 'success feature' for places around the UK, and, with a more strategic approach, is one which North Norfolk has the ready foundations for optimisation.

The heritage landscape of North Norfolk is known to be a primary tourism draw, and the pockets of culture & tourism venues / experiences add value to visitors already in destination looking for things to do – boosting the local economy. They also act as a draw to influence the choice of North Norfolk as a destination to high-spending, culturally motivated markets and often provide the 'go now' imperative for a visit.

It's also the tip of the iceberg. The dataset represents just a small part of the asset landscape, and it needs to be recognised that much of the offer is 'hidden' in terms of available published data.

- Artists and makers are often self-employed as freelancers and sole traders and don't appear as assets despite being the driving resource behind makers fairs, galleries, open studios etc. North Norfolk Open Studios, for example, is highly rated in the wider region's cultural life because of the quality and activity of its creative residents / workforce.
- Screen industries are burgeoning and present a valuable opportunity for screen tourism and studio experiences (consider the impact of Game of Thrones in Northern Ireland or Peaky Blinders in the West Midlands).[3]
- Cultural venues typically host several changing events, activities, performances, temporary exhibitions, craft markets and festivals, which there is no equivalent database for, and there are a series of place-based clusters and towns teams who also host regular and ad-hoc events and festivals.

Individual venues are working hard – in Sheringham for example the theatre and the museum are a key part of visitor offer as well as for locals - providing creative and nurturing spaces for young people, older residents, and also communities experiencing isolation or poverty. Left to their own devices many of these assets will doubtless continue in some similar shape to now – albeit some will develop and thrive, some will struggle and decline. It is however a fragile ecology and the failure of one can trigger down the chain. Cultural and heritage organisations and operators told us in consultations that they face significant operational challenges due to a lack of shared strategic framework and joined-up working.

Taken as a sector (and clustered as places, themes, audience types etc.) the opportunity exists to take these assets to a next level and enable them to contribute so much more to North Norfolk as an attractive place to live, work and visit than is currently exploited. Just taking one example:

> There is a growing number of new commercial products, such as cycling or walking itineraries, both self-guided and supported, which have been made possible because of the infrastructure, assets and appeal of North Norfolk's cultural heritage themes alongside rapidly growing market demand (e.g. Saddle Skedaddle, Inntravel, Cycle Breaks UK). Growth of these types of markets is reliant on a healthy and quality

[3] https://www.theguardian.com/uk-news/2019/sep/02/peaky-blinders-mania-birmingham-screen-tourism-boom

cultural heritage offer, and a strategic framework can ensure that North Norfolk businesses and places benefit from these investments at least as much as the operators.

Whilst Visit East of England leads the 'tourism strategy' for the region, Visit North Norfolk is one of a partnership of local DMOs providing the local tourism marketing for the district council and businesses. Visit North Norfolk primarily delivers marketing strategy, consumer facing marketing activity and related business support – and does an excellent job with its resources. However, the team is hampered by year to year funding awards and consequent inability to plan ahead and play a more strategic 'tourism development' role.

With the Visit East of England review underway and anticipated LVEP status, it is not timely for VNN to develop its own tourism strategy. However it is important that NNDC and regional stakeholders recognise the importance of North Norfolk to the region and the extent to which tourism is a significant part of the North Norfolk economy and employment opportunities. For example: North Norfolk tends to be somewhat hidden and buried in the regional channels and communications – which leads to regional imbalance and a missed opportunity for the future growth of the tourism economy in North Norfolk.

It is relevant to the characteristics of the district that several venues and attractions referenced sit just outside of the North Norfolk district boundaries. Despite location, their assimilation and partnership is important, often they have more of the 'anchor-pull' and are indicative of visitor interest and how people move seamlessly around the wider destination geography. For example, Houghton Hall is located outside of the North Norfolk District boundary, but is an example of a historic home attraction with world class contemporary arts programming. The current inclusive approach towards promoting a wider tourism offer is the right one – and can be extended by curating and signposting itineraries and packages either for independent tourists or tour operators. This would increase spend in local attractions and businesses, creating a greater financial return.

And it is knowing what to lead with for which audiences. Cromer is an asset hub and offers real potential to signpost its visitors across the district. Cromer Pier is perhaps the most visible asset – a valued, unique and heritage-led entertainment experience which makes a significant contribution to the visitor economy and the town's position with its existing markets. But other offers such as those via Cromer Art Space are showing genuine potential to deliver something more contemporary and appealing to growth markets. An interrogation of audience data at key venues would be an essential part of a cultural strategy to understand the potential for increased crossover and referral, and opportunities to generate spend outside of the initial attraction.

"Visit Norfolk is not very alert."

"There's a lack of a local, coordinated approach."

"Cromer is an interesting place. It feels like there is a lot of potential, but the offer is still quite traditional and a bit old fashioned – in every sense of the word."
Stakeholder comments

RECOMMENDATIONS

1. Making the cultural sector more visible would lead to a better understanding of its full size, scale and impact. It could also lead to new tourism product development, or an enhanced tourism offer, which would grow the visitor and cultural economies.
2. In order to develop a more substantive and correlated evidence base, NNDC would need to fully map the cultural heritage ecology.
3. However, it is clear that there is a ready and willing infrastructure to build on which has so much more potential to deliver if taken as a sector with a driving strategic framework.
4. Consider commissioning an audience survey and development plan.

SUMMARY

- North Norfolk has an appealing and diverse cultural tourism offer, which could be better exploited to become even more significant drivers of economic growth.
- Visit North Norfolk is doing a good job of showcasing the cultural / heritage assets of the destination – with limited resource.
- Working in partnership across the region will increase the visitor economy in North Norfolk, driving income within the visitor economy and associated supply chains.

B2 Employment in the arts and creative industries

B2.1 THE BIGGER PICTURE – NATIONALLY AND REGIONALLY

The arts sector[4] has 139,000 enterprises and 970,000 workers in the UK. They contributed £49 billion in gross value added (GVA) to the economy in 2022. (50% larger than the contribution of the telecommunications industry.) The creative industries' GVA is estimated to have reached £126 billion in 2022, up from £115 billion in 2021.[5]

Creative jobs are also expected to be future-proof, with 87% of creative jobs considered to be at low or no risk of automation, compared with 40% of jobs in the UK workforce as a whole.[6]

"The creative economy has an important role in innovation throughout the economy…[Rural settings] are increasingly a location for creative workers migrating from the city, and being encouraged to do so by local and central government as a way of diversifying the economic base in the face of the decline of traditional industries."
Arts & Humanities Research Council 'Understanding the Value of Arts'

Norwich ranked in the UK's creative clusters and was identified as a high concentration area, where creative industries generate 3.8% of total GVA. The Norwich cluster includes large areas that fall within the North Norfolk district boundary; thus it can be understood that the high number of creative businesses are also located within areas of North Norfolk.

"The cultural sector of Norfolk and Suffolk contributed £272 million in GVA in 2018 and grew by 16% since 2015. It supports job creation and delivers impact across the economy. Culture, then, drives growth. But it also helps shape a different kind of economy, based on wellbeing and sustainability."
Culture Drives Impact –
The Norfolk and Suffolk Culture Board Manifesto, 2022

"It all ties back to Norwich, whether you like it or not."
Stakeholder comment

At 6.5% of total employment, North Norfolk has the highest density of cultural employees of any district in East Anglia[7].

B2.2 IN NORTH NORFOLK

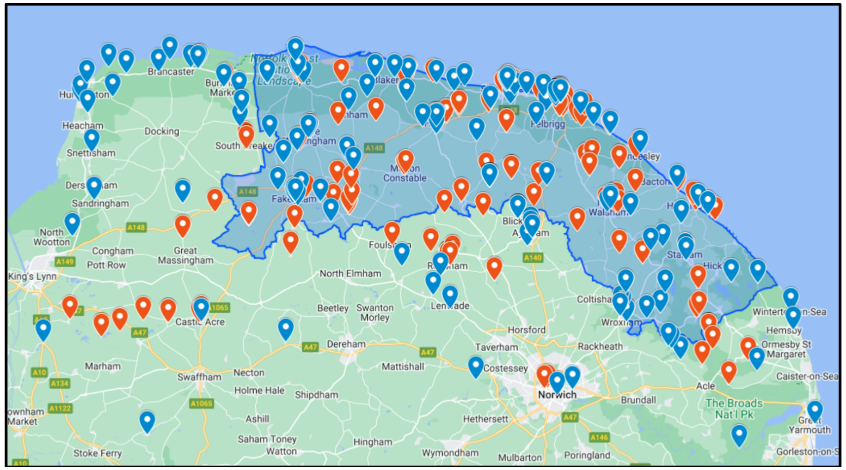
Understanding the true size and scale of the employment market (and how it connects to tourism offer) requires us to make some assumptions using a series of datasets.

The map below shows the geographic distribution of individual artists / makers (orange pins) listed on Open Studio Artists, shown alongside

[4] Definitions: art / culture includes museums and heritage, literature and libraries, visual and performing arts, carnivals and festivals, digital arts. Creative industries include publishing, broadcast media, graphic design, video games, fashion, architecture, craft, advertising and marketing.

[5] 'The Arts in the UK: Seeing the Bigger Picture', McKinsey & Co, 2023
[6] Creativity vs Robots, NESTA, 2015
[7] https://newanglia.co.uk/wp-content/uploads/2021/05/FINAL-Cultural-Sector-Skills-Plan-LEP-Officers-April-23rd-6pm.html

the geolocation of venues, attractions and landmarks listed on Visit North Norfolk (blue pins).



Adding to this, NOMIS datasets compiled from surveys of registered businesses show that there is a larger sector which isn't entirely visible:

– 1,500 people are employed in the Arts, Entertainment and Recreation sector;
– It is the seventh largest employment sector in North Norfolk;
– This represents 4.5% of overall employment - more than double the average for the East of England, and almost double the average for Great Britain. It is more than the Information and Communication, Finance and Insurance, and Real Estate sectors combined.

It should be noted that NOMIS data does not include any individual practitioners or sole traders and therefore is not complete.

The Creative Industries Policy & Evidence Centre uses census data to map employment in the creative industries, including freelancers. In 2024, in North Norfolk:

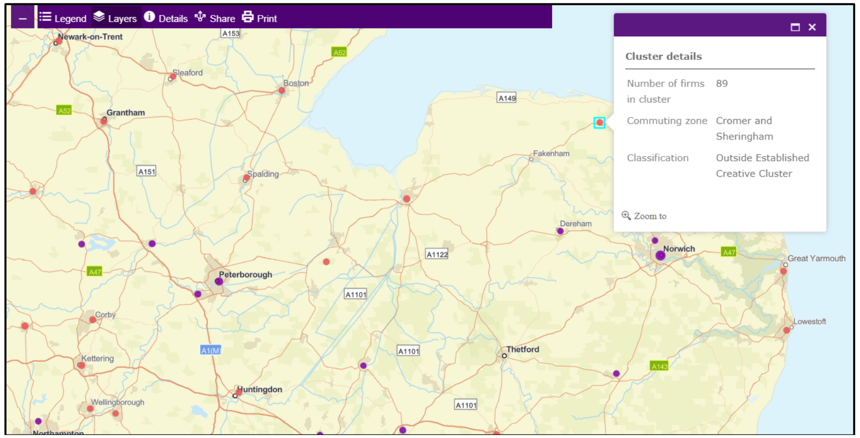
– 780 people employed in the creative industries, or 1.9% of the total employment.
– 195 of these are artists, or 25% of the total creative industries' employment.
– 115 are authors, writers and translators, or 15% of the total creative industries' employment.
– 110 are managers and directors within the creative industries.
– 100 are photographers, audio-visual and broadcasting equipment operators.
– 80 work as journalists / reporters / writers / editors in newspapers, periodicals and broadcast.
– 65 are arts officers, producers and directors.
– 45 are musicians.

The remainder work in other creative industries.[8]

We can understand the distribution of where creative professionals live within North Norfolk by comparing the data across the different wards. Coastal North Norfolk ward has the highest percentage of creative professionals, at 5.2%.

However, since this is Census data, it only describes the self-described 'main job' of the respondents. Many people work in the creative industries alongside other employment, or do so as part of a 'portfolio career'.

[8]https://app.powerbi.com/view?r=eyJrIjoiZjFlYzczNTktMjJiNC00N2JiLTk4YmQtYjEyODhmNWRmOTE2IiwidCI6IjgyYzUxNGMxLWE3MTctNDA4Ny1iZTA2LWQ0MGQyMDcwYWQ1MiJ9



Mapping the UK's creative industries
A tool by the Creative Industries Policy and Evidence Centre (PEC)
The Creative Industries Policy & Evidence Centre identifies an emerging Creative Cluster in Cromer and Sheringham.

"You have some really strong clusters of artists here, very talented and quite high-end artists. And that is a pool, a resource there, that could be invaluable to not just the economy of the area, but also socially."

"We certainly have, particularly on the coast, a lot of strong clusters of artistic communities and individual artists."

"There's Norwich, and there's North Norfolk, that's where you get the clusters of artists and fairly dynamic artist communities. And without those, the whole [artist community in Norfolk] looks very, very scattered."

"The train route to Norwich between Cromer, and the slightly more affordable housing, has led to the growth of an artistic community in Cromer."
Stakeholder comments

RECOMMENDATIONS

1. Fully understanding the economic impact of the North Norfolk creative industries would require an additional economic study. This would require significant financial resources and time from creative industries partners that may not be required at this stage.
2. NNDC could also consider commissioning a cultural infrastructure survey, to understand the supply of and demand for creative studios / spaces / makerspaces.

SUMMARY

The true size and significance of the cultural and creative sectors in North Norfolk is hidden.

Artists and makers contribute much to the 'experiential' offer in North Norfolk, and its distinctiveness, quality and credibility – and economic infrastructure.

The support and development of this sector should be a priority due to its significant economic potential.

Further reading

The Creative Industries Policy & Evidence Centre State of the Nation report is here.

B3 Where does the money for culture come from?

B3.1 THE BIGGER PICTURE – NATIONALLY AND REGIONALLY

Arts Council England distributes c.£640 million per annum to organisations and practitioners delivering against the *'Let's Create'*[9] agenda. This funding is made up of a Grant in Aid from the UK Government, and Lottery funding[10].

"Culture has a unique role to play in placemaking, the visitor economy, inward investment, skills, health and wellbeing, and inclusive growth. The New Anglia Cultural Board plays an important role in ensuring that culture is at the heart of our economic recovery."
Norfolk & Suffolk Unlimited: Covid-19
Economic Recovery Restart Plan, New Anglia LEP, June 2020

New Anglia LEP identified the creative industries as a priority economic sector for the region, and has delivered several economic development initiatives focused on this sector. For example, a specialist skills development plan was developed for both the cultural and creative industries, with a programme funded by the DCMS Create Growth programme helping businesses develop expertise in areas such as intellectual property and business planning.

B3.2 IN NORTH NORFOLK

"I don't need funding for capital. I don't need £150,000 towards putting solar panels on the roof. I need £15,000 a year to support the core existence of this organisation and that's it."
Stakeholder comment

The cultural sector is important to the North Norfolk Economy and should therefore be seen as a key sector for the area:

- The North Norfolk Creative Economy generates £38.4k GVA per head.
- This is the third highest sector, after Digital / Tech and Energy.
- Average wages in the creative sector in North Norfolk is £33.6k.

Due to the split in responsibilities across the County and District Councils, it has not been possible to get a complete cross-departmental picture of Local Government investment in the sector. From the information we see the following.

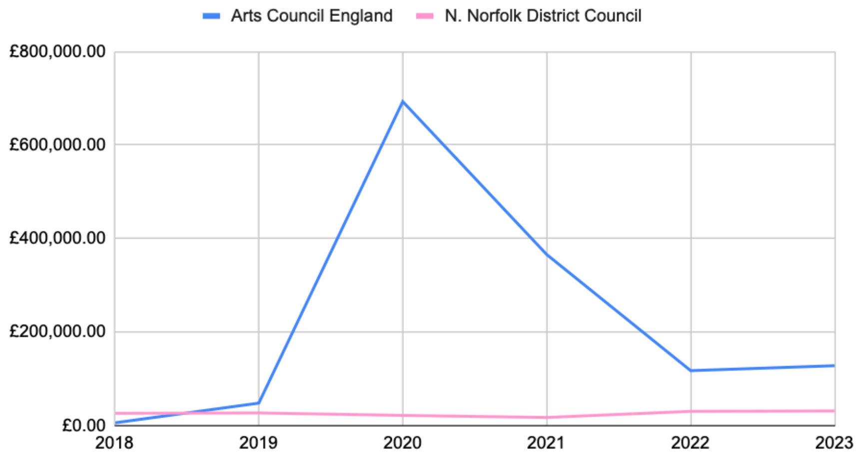
We analysed grant funding investment to the cultural sector in North Norfolk from Arts Council England (ACE) from 2015-present. During this period, **ACE invested £1,657,405.00 in North Norfolk**.

Investment in the period from 2015-2017 totalled £273,893, and with only two grants awarded in 2017.

Investment into North Norfolk spikes during the pandemic, when significant public funds were distributed to the cultural sector through the Emergency Response Fund and Cultural Recovery Fund.

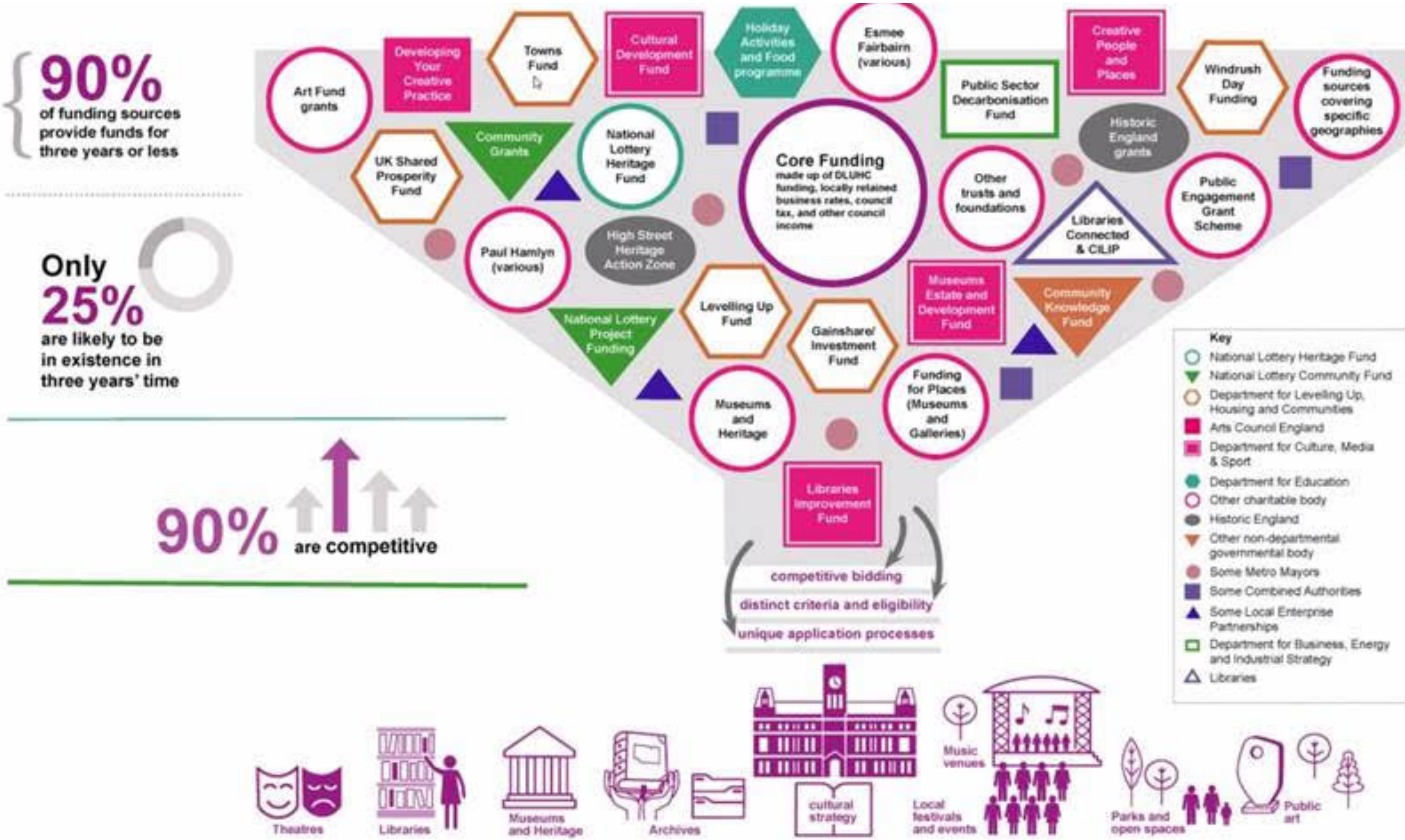
[9] https://www.artscouncil.org.uk/lets-create

[10] Source: ONS Business Register & Employment Survey



How are funds distributed by the awarding body?

The Local Government Association has produced a graphic showing the cultural funding landscape and highlighting the inter-dependencies and complexities. This makes for a sector that is in flux, fragile and fragmented, and in need of strategic support to ensure organisations can tap into potential funding sources, become more resilient and, as a result, contribute to economic sustainability and growth.



The complex landscape of fragmented funding for culture (Local Government Association)[11]

[11] Source for funding sources and their attributes is research carried out by RedQuadrant for this work with leaders and members of the Local Government Association and Chief Cultural and Leisure Office Association. Due to the complexity of funding sources, the research is not comprehensive but does provide a good indication of the whole range of funding sources as understood. RedQuadrant has made every reasonable effort to ensure the information contained herein is accurate and referenced in reputable sources. This is an indicative survey of the subject and does not claim to be complete or comprehensive.

ACE's 'Levelling Up for Culture' dataset analyses local authorities against several indicators. We compared North Norfolk with the rest of Norfolk, and other similar areas (see table overleaf).

North Norfolk receives the lowest annual ACE investment per capita in Norfolk, and amongst other comparable areas. It is rated overall as high need (high need of cultural investment) but low opportunity (few cultural organisations capable of managing investment).

Due to this, **North Norfolk is a designated 'Levelling Up for Culture Place' until 2025**.

Funding received from ACE is at a higher level since receiving the designation – 2023 saw a 54% increase in funding awarded compared to 2018. Whilst this demonstrates that the Levelling Up for Culture Place status has recently increased funding into the North Norfolk district, there is still scope for more ambition.

Of the overall ACE funding to North Norfolk, approximately 70% was awarded to organisations and 30% to individual practitioners. When looking at ACE funding streams targeted at individuals (Developing Your Creative Practice – DYCP) across all the districts in Norfolk, Norwich dominates with 63% of the total funding awarded. However, North Norfolk receives the second highest amount of funding at 11%, and South Norfolk is just behind at 10%. In fact, North Norfolk receives more than double that of Breckland and Great Yarmouth combined. This likely mirrors the high number of creative practitioners living in the district.

Interestingly, this trend does not continue in funding streams targeted at cultural organisations (Grants for the Arts and National Lottery Project Grants – NLPG). In the period of 2014-present, North Norfolk ranks fourth out of the seven Norfolk local authority districts in total amount invested. North Norfolk's total amount awarded in this ten year period is 4% of the overall investment in Norfolk, way behind South Norfolk's 12%, and lower than the total amount that Norwich received in 2023-4 alone.

North Norfolk does receive some other ACE investment. National Portfolio Organisations (NPOs)[12] receive core funding from ACE. Norfolk Museums Service is an NPO and operates Cromer Museum, providing the only permanent NPO presence in North Norfolk. The annual Norwich & Norfolk Festival is also an NPO, and hosts events in Sheringham Little Theatre and Houghton Hall.

[12] Arts Council England identifies NPOs as 'leaders in their areas, with a collective responsibility to protect and develop our national arts and cultural ecology'.

Place Name	Average Annual Investment Per Capita (17/18 - 19/20)	% of LSOAs in LA within lower two deciles of IMD	Active Lives Score	% of pupils in LA - Eligible for Free School Meals	% of pupils in LA - Special Educational Needs	Red Cross Vulnerability Index Score	Proportion of Population - Life impacted by disability or long-term health condition	Proportion of Population - Black, Asian and Minority Ethnic	Need Score	Need Descriptor	Total Opportunity Score	Need + Opportunity Descriptor
North Norfolk	£1.33	3%	54%	14%	15%	149.53	23%	2%	0.69	High Need	6	Low Opportunity so Not Eligible for Balancing
Breckland	£1.60	9%	43%	15%	12%	63.46	20%	3%	0.42	High Need	10	Low Opportunity so Not Eligible for Balancing
King's Lynn and West Norfolk	£1.71	15%	50%	16%	13%	171.75	21%	3%	0.93	High Need	11	High Need & High Opportunity
South Norfolk	£4.03	0%	52%	10%	10%	96.59	18%	3%	-0.10	High Need	6	Low Opportunity so Not Eligible for Balancing
Eastbourne	£5.43	20%	54%	19%	12%	115.55	21%	7%	0.54	High Need	15	High Need & High Opportunity
Dorset	£5.63	5%	% [see not	15%	15%	96.39	20%	3%	-0.04	High Need	10	Low Opportunity so Not Eligible for Balancing
Great Yarmouth	£6.61	38%	39%	29%	17%	133.23	22%	4%	0.74	High Need	15	High Need & High Opportunity
Folkestone and Hythe	£8.48	22%	50%	20%	12%	114.11	21%	6%	-1.13	Low Need	-	Low Need so Not Eligible for Balancing
Cornwall	£8.80	13%	56%	15%	13%	125.35	21%	2%	-1.58	Low Need	-	Low Need so Not Eligible for Balancing
East Suffolk	£9.50	14%	% [see not	18%	12%	95.00	20%	3%	-1.48	Low Need	-	Low Need so Not Eligible for Balancing
Hastings	£11.52	43%	55%	29%	13%	106.67	22%	7%	-0.80	Medium Need	14	Medium Need & High Opportunity
Norwich	£32.36	40%	62%	21%	13%	87.04	18%	10%	-1.33	Low Need	-	Low Need so Not Eligible for Balancing

Accessing data about individual organisations' financial performance has proved difficult. However, interrogation of charity commission accounts and other publicly available data sources shows that organisations are very reliant on self-generated income (at least 50%) – and that profit margins are small or non-existent. Greater access to grant funding and joint programmes would make a significant difference to organisational capacity and growth.

This table shows the methodology for Arts Council's Levelling Up for Culture Place designation, with North Norfolk alongside all of the other districts in Norfolk, and some other similar places for comparison.

North Norfolk receives by far the lowest investment from ACE per head. Norwich receives 24 times the level of investment as North Norfolk.

It shows that North Norfolk is deemed as 'high need' due to the lack of investment and low levels of resident engagement in the arts, it is also deemed 'low opportunity' due to the low numbers of cultural organisations applying for investment. Reasons for low levels of applications are due to skills, capacity and strategic framework. If North Norfolk's cultural sector were better supported to apply for ACE funding, the district may have benefited from increased investment.

B3.3 KEY INSIGHTS

Cultural organisations in North Norfolk are clearly under-invested – and consequently **growth potential is stymied by lack of capacity and capability**.

The disparity between the DYCP and NLPG funding streams demonstrate a good number of individual practitioners living within

North Norfolk who are accessing strategic investment. However, the investment in individuals is not yet translating to a sense of creative clustering or essential infrastructure for cultural engagement and economic growth. We noted that many of the successful applicants over the 10-year period were repeat applicants. This suggests that there are only a small number of practitioners and organisations who know how to successfully apply for ACE funding in the area.

North Norfolk should see a continued trajectory of increased ACE investment, but must keep working to demonstrate the need and advocate for that investment. Greater gathering and usage of evidence will help North Norfolk's cultural sector maintain and/or increase their funding beyond the Levelling Up for Culture designated status period. This should be done collaboratively with NCC and ACE. Increased inward investment into the cultural industries will enable the sector to maximise its ability to drive economic growth in the district and wider region.

Benefits of creative clustering include:

- Job creation;
- Increased businesses birth rate;
- Better access to talent pool;
- Market opportunities;
- Wage increases;
- Innovation and knowledge spillover;
- Increased attractiveness of destination;
- Retention of young people;
- Supply chain benefits;
- Connectivity;
- Improved education;
- …and many more…

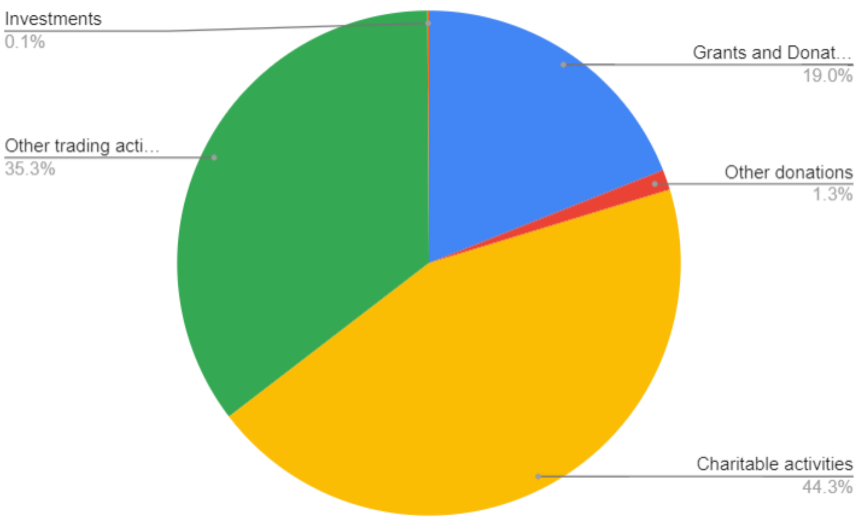
B3.4 CASE STUDIES

Sheringham Little Theatre

Using the accounts published on the Charity Commission website for 2022/23, we have created a chart to demonstrate the different types of income for Sheringham Little Theatre.

Sheringham Little Theatre is reliant on transactional income through ticket sales and trading. Growth in the cultural tourism visitor market, both in the existing season (extra performances) and through an extended demand in shoulder-season creates the opportunity for Sheringham Little Theatre to build resilience and sustainability.

Income source 2022/23	e.g.	Amount	%
Grants & donations	Grants provided by NNDC and NCC	111,543	19
Other donations	Memberships	7,553	1.3
Charitable activities	Ticket sales	260,076	44.3
Other trading activities	Bar sales	207,340	35.3
Investments		375	0.1
Total income		**586,887**	**100**



Support in accessing grant funding is a common theme:

RECOMMENDATIONS

1. There is an urgent imperative to optimise the Levelling Up for Culture Place designation which runs until 2025 – this could be for strategic activities and shared infrastructure investments as well as for individual organisations and places.
2. Develop a support programme for increasing applications to Arts Council England, and increase both the amount of funding awarded to the area, and the number/range of organisations benefiting. This would help to address the perceived 'low opportunity' for investment, and help to sustain and / or grow the sector.
3. Establish a collaboration network for creative practitioners to increase partnership working, combining offers for visitors and residents. This may drive footfall, engagement and growth.
4. Ensure close working relationships with Norfolk-wide cultural organisations, NCC Arts Service, Norfolk Museums Service and other key sector organisations.
5. Build a relationship with Arts Council England to advocate for the local sector and secure increased strategic investment into the district, enabling cultural organisations to be more economically resilient, and enabling local businesses and residents to benefit from a better resourced arts sector.
6. Build relationships with local NPOs to better position North Norfolk's residents and economy to benefit from their work.
7. Proactively gather and use data and evidence, to help North Norfolk's cultural sector maintain and/or increase ACE funding beyond the current Levelling Up for Culture designated status periods.
8. Consider how NNDC strategically supports cultural organisations to become sustainable by leveraging additional external funding, increasing their resilience and opportunity for growth.

SUMMARY

- North Norfolk is a designated 'Levelling Up for Culture' place due to historic low investment.
- Cultural organisations are fragile. Income just about covers costs and they have limited capacity for business development activity.
- North Norfolk is not attracting enough strategic national funding for culture despite its designation as a Priority Place, and so is limiting the economic value of the cultural sector.
- NNDC should play a role in maximising inward investment in the cultural sector to enable sector resilience and growth.
- To increase inward investment into this sector, NNDC needs to build relationships with NCC (arts team) and ACE, to establish shared vision and encourage applications through better communications, programmes and toolkits.
- A North Norfolk Cultural Strategy / Strategic Framework for investment would be essential in informing ACE grant awards, and ensure that investments deliver to the North Norfolk growth agenda.

"There's fantastic work going on in Sheringham Museum. They do loads of stuff which does meet our aims. But I don't think they've ever put in an application for funding for a project grant from us, but they are well placed to do that. So they're just an example of an organisation that with a bit of support and a bit of help, could benefit [from ACE funding]."
Quote from consultation with Arts Council England Relationship Manager, North Norfolk

"We'd definitely welcome a cultural strategy for the area."
Stakeholder comment

Further reading

- Arts Council England's ***Let's Create*** strategy here.
- E.g. links to ACE Priority Place and LUFC methodology here.
- Local Government Organisation's 'Cultural Strategy in a Box' can be found here.
- 'The Arts in the UK: Seeing the bigger picture' report is here.

B4 Driving visitors – volume and value data

B4.1 THE BIGGER PICTURE

The value of travel and tourism in the UK in 2022 was estimated at £237.1bn – only 4.6% down on 2019, representing a near recovery from the impact of the Covid-19 pandemic.

B4.2 IN NORTH NORFOLK

"Tourism doesn't just happen, and the sector, for the value it brings to the economy, may feel overlooked and at times a little drained."
Larking Gowen Tourism Business Survey 2024

"We have to adopt a mixed economy that makes as much money from the visitors and the second homes as they possibly can… that's what sustains us."
Stakeholder comment

- The economic value of tourism in North Norfolk is c.£512m+ per annum.
- Tourism supplies 8300+ Full Time Equivalent jobs in North Norfolk – representing over 18% of total jobs.
- 96% of visits to North Norfolk are for the purposes of holidays & visiting friends & relatives.
- 13% of residential properties in North Norfolk are second/holiday homes.

According to the Norfolk Office of Data & Analytics, in 2022-23 the North Norfolk Visitor Economy generated:

- £17.5k GVA per head.
- £0.16bn GVA, or 8% of North Norfolk's overall GVA.
- The highest number of jobs available in North Norfolk (9016 jobs).
- The lowest average wages in North Norfolk (£19,900, and way behind the national average c.£25k per annum upwards).[13]
- The highest percentage increase in the number of jobs (+10.4%), and is predicted to grow by another 12.5% from 2023-2033 (this is above the national average of 9.5% growth in hospitality, and 6.6% across all sectors).[14]
- The highest competitive effect in North Norfolk[15] and the second highest location quotient (after agri-tech).[16]

"The Economic Impact of Tourism Report for North Norfolk in 2022 indicated some degree of recovery but that the volume and value of tourism still have not returned to the pre-pandemic levels. Whilst the 2022 report did demonstrate a recovery, North Norfolk's high dependence on the visitor economy, and the recently exposed fragility of it, means it is essential to find ways to ensure it remains vibrant, resilient and moves more towards a year-round offering. Shifting from the traditional seasonal tourism patterns, which tends to create short-term, lower-paid employment and less animated places

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[13] https://www.restaurantonline.co.uk/Article/2023/05/22/uk-hospitality-salaries-outpace-national-average
[14] ibid
[15] Competitive effect indicates how much of the job change within a given region is the result of some unique competitive advantage of the region. A positive competitive effect suggests that the region has some competitive edge or unique factors driving job growth beyond national or industry trends.
[16] A location quotient (LQ) is an analytical statistic that measures a region's industrial specialisation relative to a larger geographic unit.

for local people in the low seasons, will be essential to fostering greater wealth creation and economic resilience."
North Norfolk District Council Economic Strategy & Action plan 2023-7

"A contributing factor to the lower median wages in North Norfolk is that approximately a quarter of the population are employed within some aspect of the visitor economy, which in the main tends to pay lower wages than other sectors…North Norfolk's high dependence on the visitor economy, and the recently exposed fragility of it, means it is essential to find ways to ensure it remains vibrant, resilient and moves more towards a year-round offering. Shifting from the traditional seasonal tourism patterns, which tends to create short-term, lower-paid employment and less animated places for local people in the low seasons, will be essential to fostering greater wealth creation and economic resilience."
North Norfolk District Council Economic Strategy & Action plan 2023-7

We generated a series of online keyword search terms, then applied different place terms to them – North Norfolk, Cromer, Fakenham, Holt, North Walsham, Sheringham, Stalham and Wells-next-the-Sea – generating a total of 128 search terms analysed.

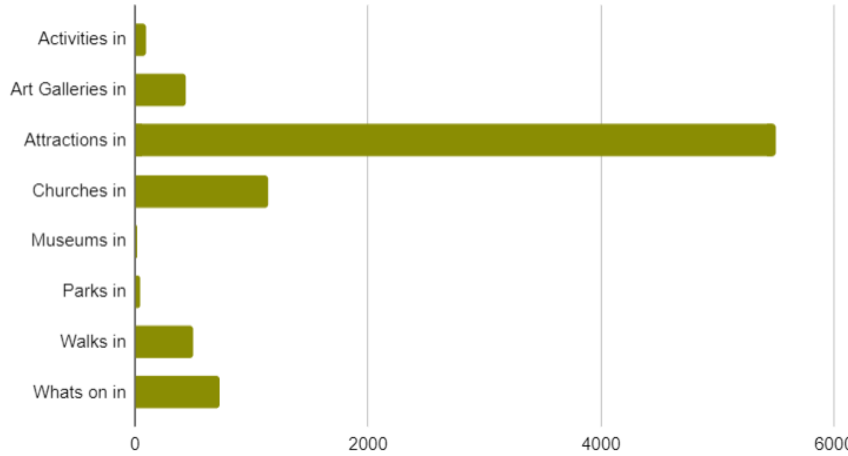
Root term		
What's on in…	Youth Groups in…	Churches in…
Activities in…	Attractions in…	Art Galleries in…
Walks in…	Things to see in…	Workshops in…
Parks in…	Playing fields in…	Studios in…
Hotels in…	Sports teams in…	Museums in…
Community centres in…		

When looking at the average monthly searches, we can see that tourism-related searches (hotels in, attractions in) dominate the results. Other search terms, which could apply to either residents or visitors, are significantly lower. The terms which generated no results are all terms more likely to relate to residents.

Root term	Ave. monthly searches
What's on in…	720
Activities in…	100
Walks in…	500
Parks in…	40
Hotels in…	37,620
Museums in…	20
Attractions in…	5,500
Churches in…	1,140
Art Galleries in…	440

Things to see in, Community centres in, Youth Groups in, Workshops in, Studios in, Playing fields in and Sports teams in all yielded zero searches.

What generic key terms are being searched across the region?



* The search term 'hotels in' has been removed from this chart in order to generate more useful comparisons.

Place	Ave. monthly searches
North Norfolk	8,460
Cromer	16,170
Fakenham	1,600
North Walsham	1,600
Wells-next-the-Sea	8,100
Holt	3,560
Sheringham	6,270
Stalham	320

KEY INSIGHTS

As evidenced in the Economic Impact of Tourism Report for North Norfolk 2022, tourism isn't picking up in North Norfolk as quickly as it is in other parts of the UK.

There are no obvious 'negative' reasons for that – perhaps more pointing to an overall lack of clear strategy, shared vision/identity and partnership working.

Visit North Norfolk does a very good job on limited resources – but the challenge isn't limited to destination marketing. Search data shows that there is demand for what is on offer and that cultural / heritage / landscape are key drivers. But there needs to be more of it, more joined up, more visible and more targeted at growth markets to achieve the optimum level of scale and dispersion.

This requires some investment in product, skills and partnership working – working to strategic agendas

B4.3 CASE STUDIES

Visitor Economy Skills Development in the East of England

Visit East of England's Visitor Economy Skills Group spearheaded a **Visitor Economy Network Initiative** (VENI), a first for the Eastern region and an important part of the skills offer. It was awarded £1.1m from the European Social Fund. The VENI partnership, comprising three colleges and private and public sector stakeholders (including Visit North Norfolk), has put components in place for an East Academy for Skills in Tourism (EAST). The vision is for a joined-up industry provision for the region, delivering the skills needed in management, the workforce, and those needed in the future labour market. Visit North Norfolk (and North Norfolk District Council up to March 2023) is delivering a pilot programme bringing north Norfolk businesses and schools together to promote careers in the local hospitality sector. In 2023, a programme of activity took place including exhibits at the Norfolk and Suffolk Careers Fair, work experience placements, business breakfasts and post-16 options events.

The Deep History Coast

North Norfolk has the potential to really meet the needs and expectations of culturally motivated visitors – but it lacks cut-through in an increasingly well-delivered market place. A unifying campaign which could go deeper.

DEEP HISTORY COAST

"If you wanted a sticky idea to really build capacity and excitement and product and improve local infrastructure and walking and cycling, it all fits under the Deep History Coast."
Stakeholder comment

The Deep History Coast has been developed as a unifying brand and campaign which brings together environmental and historical narratives, with special appeal to family markets, across different locations. Whilst the concept has legs – it showcases the unique landscape of North Norfolk and has potential to unite partners around a common story – it currently feels underdeveloped, a bit unloved, and is not 'owned' by the local community. The name lacks impact, and activation of the campaign has been limited to date due to Covid and budget constraints.

There is scope in all destination partners uniting around this concept – but it needs to lift itself beyond the current trail / app assets. The 'Experience Maker' scheme enables local businesses to promote the DHC, with assets such as window stickers, posters, visitor leaflets, and activity packs. This is a first step, but needs partners to be activating and applying it in their own 'on-brand' ways.

And it needs to modernise – North Norfolk's coastal significance isn't just historic. It is a contemporary story encompassing the Great Chalk Reef (the longest in the world), the biodiversity, and the very real threat of climate change. Using this to further position (North) Norfolk as a leader sustainable tourism is an area for development.

A destination campaign – whether the Deep History Coast or a newer iteration – needs to be resourced in order to be appropriately activated. It needs strong local partnerships, as well as national supporters. The community needs to own it and love it – understanding why where they live is special, and generously sharing it with visitors.

"Somebody will find the oldest human remains out of Africa and they will probably find it in our lifetime. That will be a world story and North Norfolk will be at the centre of it. Has somebody got a grip on the comms and the PR and the international opportunity? We'd probably all scrabble around asking who's doing the interviews and stuff like that."

"[The Deep History Coast] is an extraordinary asset of – and I don't use this term lightly – probably international importance."
Stakeholder comments

The Jurassic Coast

The Jurassic World Heritage Coast in Devon and Dorset has UNESCO status connecting landscape with culture and cultural tourism. All local partners know to strategically utilise this brand, be that via screen industries (e.g. Ammonite, telling the story of Mary Anning); local attractions liaising around marketing and programming; or product development.

Tour Operators are able to sell a full package of experiences, including the free-to-access walks alongside accommodation, recommendations for local restaurants and upsells to visiting local attractions: https://maximumadventure.com/adventure/the-jurassic-coast/

The Wild Atlantic Way

Visitors buy experiences and not products. The Wild Atlantic Way, which runs from Cork to Donegal has proven to be one of the most successful tourism initiatives ever developed in Ireland. Developed as a branded coastal road, the Wild Atlantic Way (WAW) was launched in 2014 as Ireland's first touring route, and at 1,600 miles (or 2,300km) it is claimed to be 'one of the longest defined coastal routes in the world'.

It is now worth more than 3bnEuros a year, sustains over 3500 jobs, and supports over 2000 tourism businesses. The route consists of over 180 'Discovery Points' in locations in areas outside of the main towns and villages, and are intended to encourage equitable and sustainable dispersal of visitors.

RECOMMENDATIONS

1. Further research and analysis could be conducted to understand more about keyword searches for individual events, venues, attractions, hotels etc. year-round. Data can also be divided into search terms used locally, regionally and nationally, to understand the location of the audiences.
2. Re-develop the Deep History Coast programme and partnership, and develop the concept to incorporate more contemporary themes.
3. Build collaborative partnerships across the county, especially with urban settlements (King's Lynn, Norwich, Great Yarmouth), local DMOs and districts to provide a joined up approach to maximise growth potential.
4. Understand that Cromer is the 'hook' for visitors to North Norfolk. As such, it needs to be used better as the 'gateway' to North Norfolk, and supported to signpost visitors to other places more effectively.
5. Develop a shared database of hospitality workers across the region.

SUMMARY

– North Norfolk has a significant visitor economy.
– Hospitality wages in North Norfolk are lower than the UK average.
– Working in partnership across North Norfolk and the region will help mitigate overtourism.
– Visitor spend can be maximised and dispersed across North Norfolk.

B5 Cultural tourism – a big opportunity

B5.1 THE BIGGER PICTURE

30% of all international visitors to the UK cite heritage and culture as the primary motivators for their reason to visit the UK. This is the highest proportion for any reason to visit.[17]

Culture and heritage has a critical role in building a sustainable and resilient tourism economy. Cultural tourists are highly sought after as they tend to be 'good' visitors who spend higher than other visitors (several studies estimate as much as 38% higher per day[18]), stay longer, tend to be 'socially responsible' and support local communities. They engage deeply and are typically willing to value and help conserve what they have seen and enjoyed. International cultural tourists in the UK spend on average £560 per trip, compared to all domestic overnight visitors, who spend on average £210 per trip, and domestic day visitors who spend about £35 per trip.[19]

Historic England estimates that for every £1 spent as part of a heritage visit, 32p is spent on site and the remaining 68p is spent in local businesses including restaurants, cafés, hotels and shops.[20]

A Visit East of England survey of filming locations (including Holkham Hall) showed that 36.1% of all international tourists and 11.6% of all domestic tourists could be defined as core screen tourists i.e. a screen production was the primary motivator for their visit.

[17] 'Investing in Success', Visit Britain and the Heritage Lottery Fund
[18] https://www.google.com/url?q=https://www.mytravelresearch.com/culture-and-heritage-tourism-boosts-visitor-economy/&sa=D&source=docs&ust=1724167181045009&usg=AOvVaw2Kno-I8mBsTLpHX4ZS1uIZ

"The New Anglia LEP was established in 2011. Shortly after it was established it supported the setup of a cultural board to act as a sector advisor group, in response to the cultural sector being identified as one of LEP's 10 priority sectors and vital to the realisation of the area's economic growth targets. The board recognised that it needed a medium-term plan to shape its ambition and potential, and 'Culture Drives Growth' was launched in 2015. 'Culture Drives Growth' underpinned the development of two major strategic projects: 'StartEast: building the cultural economy', a bespoke business support programme for the cultural sector, and the second phase of cultural tourism work – 'Look Sideways East'."
LGA Cultural Strategy in a Box

B5.2 INSIGHTS

In recovering from the impacts of the pandemic on tourism, North Norfolk has an opportunity to prioritise the growth of cultural tourists. There is a strong baseline match of products and motivations / demand and significant room for growth with the right investments in programme, visibility and joined up working.

Looking at patterns of online search terms can be a very illuminating way to understand how (potential) audiences / visitors and residents are wanting to experience the area – what they want to see, do,

[19] The Impact of Heritage Tourism in the UK Economy, National Lottery Heritage Fund, 2016
[20] Investing in success Heritage and the UK tourism economy, Historic England, 2010

participate in – and where and when they want to stay, and to do those things. Understanding and anticipating audience/visitor demand can help with planning and programming on a venue or community basis.

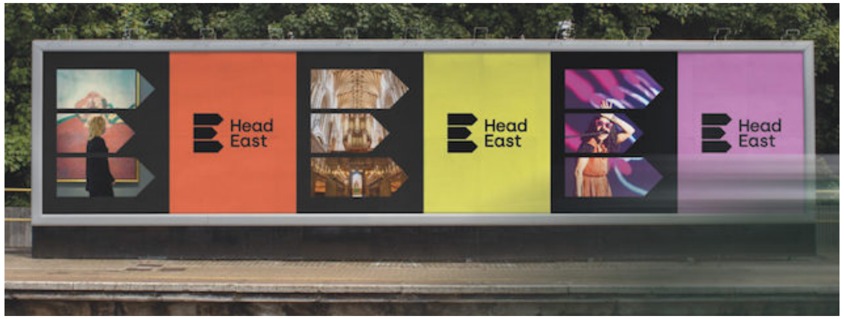
Cultural tourism is a major thematic narrative for the East of England and one which North Norfolk can feature more visibly than it does. Cultural tourists are discerning, and they can be motivated to travel by significant, well profiled venues and events – and so ensuring that there is hero-product is vital. Cultural tourists enjoy discovering the local and the authentic – and North Norfolk offers plenty of scope for this – only it is currently invisible and not well 'packaged' or signposted, including online.

Head East is a regional vehicle intended to highlight star cultural tourism product for the East of England region – but North Norfolk is limited to individual key attractions such as Holkham Hall, and established events such as Holt Festival. It's always going to be hard to compete in a region with strong hero-product and brands, and therefore really important that North Norfolk understands what it has got, can talk collectively about its assets and package them in ways which make them more than the sum of their parts.

"In North Norfolk, it's about those little things."
Stakeholder comment

B5.3 CASE STUDIES

Head East



Head East is a marketing campaign which aims to promote Norfolk & Suffolk as cultural destinations. It is hosted by Visit East of England, and funded by a consortium of partners on behalf of the Norfolk & Suffolk Culture Board. It has existed for around a decade in various guises.

- It is estimated that cultural tourists account for 65,000 people making 190,000 visits during the course of the final year (April 2016 – March 2017) at the main venues and festivals.
- When asked about motivation to visit East Anglia, 'arts, entertainment or cultural event' is the top choice of 68% of respondents.
- Cultural tourists spent and estimated £13,042,400 in the local economy in 2017.

The concept of Head East is sound. But the current lack of appropriate resourcing means it has a limited impact. To mitigate this, the trend is towards listing more evergreen product for greater ease of listings management – but cultural products are often time-limited performances, events, exhibitions etc. The inability to properly manage time-limited content on the website removes any time-sensitivity or urgency from visitor motivations. Equally, the year-round listed product can be found on several destination sites: limiting Head East's uniqueness and impact.

The listings for North Norfolk are largely the major attractions in the North Norfolk area, so Head East is not currently highlighting the smaller or lesser known visitor opportunities, which a more culturally-focussed visitor would want to access, and which provide a complementary offer for a richer overall experience. This is an area of development for Head East.

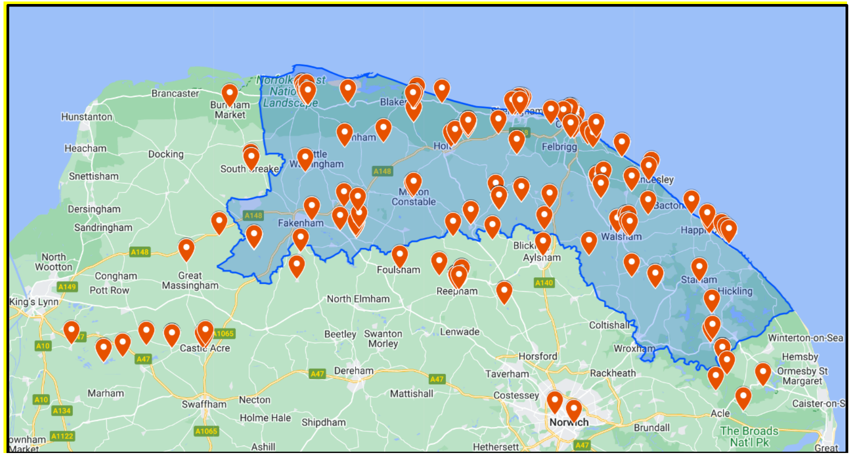
Head East's strategy is shifting from primarily focusing on bringing visitors from outside the region to growing audiences between Norfolk and Suffolk counties. There is more interest now in developing local audiences rather than big draws from across the country, and is supported by robust audience data. Smaller cultural organisations are becoming more valuable as people locally are less aware of them compared to the big attractions.

"A lot of those smaller organisations are becoming valuable, because they're adding texture. Local people know about the big offer, but that don't know about all these other things around it. So, come up from Suffolk to Norfolk for a weekend and there is absolutely tons you can do."

Stakeholder comment

North Norfolk Open Studios

North Norfolk Open Studios sees artists and makers coming together to open their workspaces to visitors, showcasing and selling their work, over two weeks each year. This year, 171 artists participated. We can see their geographical distribution in this map:



In 2019, NNOS attracted 31,900 visitors, of whom 64% travelled over 10 miles for their visit. Visitors spent £29 per person on 'other than art' during their visit. This represents £564,300 spent in local pubs, shops, cafes and restaurants, attractions and accommodation.

141 artists opened their studios to the public, and collectively sold an estimated £328,000 of artworks.

The estimated total economic impact of North Norfolk Open Studios to the North Norfolk economy is a minimum of £815k and up to £915k in just a fortnight.

Additionally, over a third of visitors are travelling from outside of Norfolk to visit, from the likes of London, the Home Counties and the Midlands. These are purposeful visitors to North Norfolk, wanting to spend money on art and who are staying in local accommodation.

NNOS attracts nearly double the number of visitors to the next nearest district (Broadland) and almost three times the number, for example, of those visiting Norwich studios. The evidence points strongly to the fact that the North Norfolk district is seen by the public, both inside and outside of the county, as the centre of contemporary fine arts in Norfolk.

"We're very conscious that people in North Norfolk don't have access to the arts."

"There is quite a lot of culture around but I don't think it's very visible to most people."
Stakeholder comments

RECOMMENDATIONS

1. North Norfolk needs to prioritise its appeal to high-spending cultural tourists and tap into regional initiatives and positioning.
2. Support Head East to expand and develop its offer to serve smaller attractions and offers within North Norfolk.

SUMMARY

- Cultural tourists spend ***266%*** more than general tourists in the local economy.
- Cultural tourism should be an area of strategic focus to further increase visitor spend.
- 'Head East' could deliver more for North Norfolk with the right support.

B6 Addressing seasonal tourism and bookability

B6.1 IN NORTH NORFOLK

"The ability to put on a good show at different parts of the year with a real quality is there."

"Seasonality is something we have been trying to address."

"There's a massive challenge with seasonal tourism."
Stakeholder comments

The Visit East of England Winter 2020 Business Survey suggested that the majority of trade (43%) is delivered during the summer months, followed by almost equal share of activity taking place in Spring (23%) and autumn (21%). Three in five (62%) believe that developing the year-round visitor economy would help their business in the future. Two thirds of respondents believe that not developing year-round business is the key barrier to business productivity.

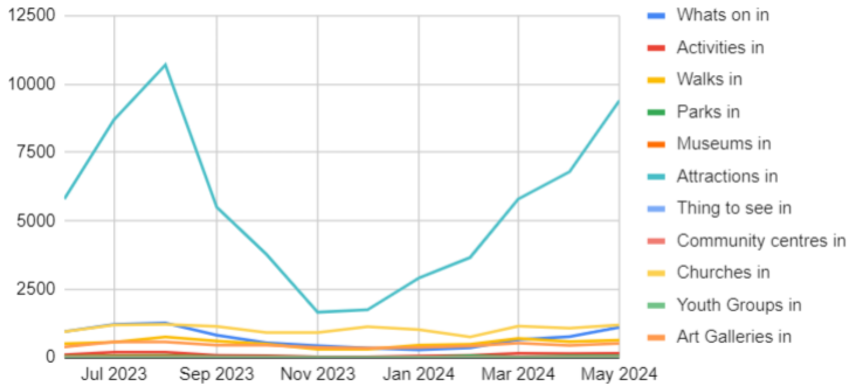
"You will find some businesses in this part of the world where they'll do 60-70% of their year's trade in July and August."

"You spend six months of the year moaning that there are no tourists and then spend the other six months of the year moaning that there are too many tourists."

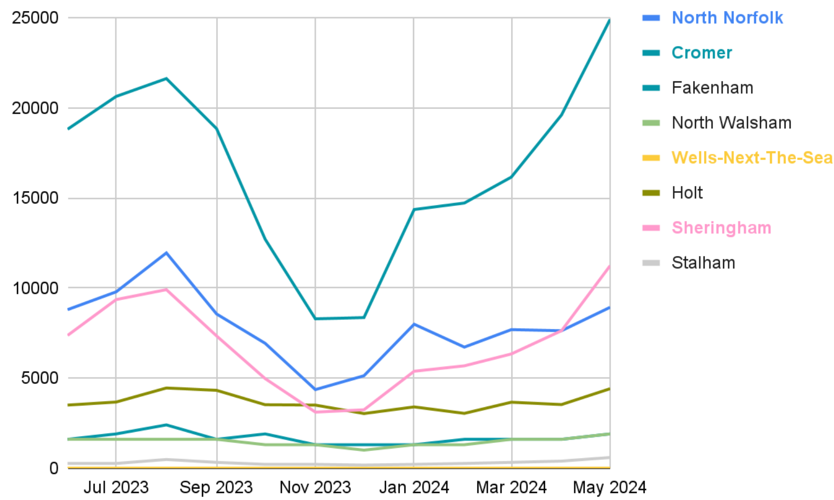
"We are a week away from being out of business. All it takes is for something to happen so we can't open during a week in summer, and that puts a massive hole in our finances and there's nowhere to go."
Stakeholder comments

We mapped online keyword search terms across a calendar year. Whilst tourism-related searches do have seasonal peaks and troughs, other search terms remain consistent throughout the year, suggesting that they are residents' searches.

How does seasonality impact search volumes for each key term?



Root Term



ctconsults.

This chart demonstrates that Cromer is by far the most affected by seasonality in its search patterns, more so than the district as a whole. Some places are unaffected, suggesting they are less popular with tourists and cater more towards local residents.

We mapped how many assets on the Visit North Norfolk website were free to access or had a pay barrier, and whether the experiences can be booked online.

- 62% of assets are free at the point of access.
- Of those that do require payment, 46% do not offer an online booking facility.

"The issue is there's no central source of information for all these various things that are going on in North Norfolk. Where is the database-driven website that has got all these listings in the same place?"
Stakeholder comment

B6.2 INSIGHTS

The lack of digital optimisation represents a significant and rapidly growing issue.

Technology is a key driver for growth in a number of ways:

- Responding directly to rapid changes in consumer behaviour and expectations;
- Increasing visibility, awareness and connection across the whole customer journey;
- Supporting good customer service and experience;
- Driving transactions and securing income;
- Extending lifetime visitor value.

Many visitors expect to be able to book online in advance. Enabling this function also enables visitor data capture, which can be used as evidence for funding applications, operational planning, marketing, investment planning and more.

There is a need to ensure that the visitor experience is well delivered and meets expectations – and that includes the online experience as well as the physical. For example, where reliable WiFi is a regular issue at entry points taking only epos payments, then it is important to offer alternatives including cash machine facilities and, better, pre-online bookings – which also enable operators to capture data and maintain relationships with visitors. And where all else fails, it is better to let a visitor in than turn someone away.

The customer journey begins online and levels of digital capacity and capability are a determining factor for success. Our experience of this was weak in a number of venues. Destinations need to be digitally optimised, with facilities such as online booking systems and the availability of bookable products increasingly expected by visitors. This can be difficult to achieve in areas where digital infrastructure and literacy is poor. Grant schemes are available but reportedly lack take up.

Destinations dominated by landscape / nature product, such as North Norfolk, are more vulnerable to challenges around seasonality. Increasing cultural tourism product in the shoulder / off season is a well evidenced and established tool to reduce the negative impact of seasonality. Norfolk County Council was one of the participants in the '*A New Strategy for Sustainable Tourism: EXPERIENCE Best Practice Guide*', through which new cultural / experiential product was developed, especially in the off season.

B6.3 CASE STUDY

Digital That Delivers

Digital
that Delivers.

Failte Ireland is currently investing in a nationwide programme of digital transformation with 1,000s of its attractions and experience businesses. It recognises that over the past few years, there has been a growing trend in the travel sector around the online distribution of visitor experiences, encompassing attractions, day tours, and activities.

This investment has been driven by changes in consumer behaviour, accelerated post 2020. More people are using online channels to decide which destinations they visit and to discover and book all components of their trip: including not only travel and accommodation, but also visitor experiences. Tourism businesses need online booking and distribution to better manage visitor numbers, their business operations, and their revenues. Therefore, all tourism enterprises need to become digitally enabled to better respond to the needs and expectations of visitors.

While some sectors such as accommodation have made good progress in this area, others, including many attractions, are only starting this journey.

Fáilte Ireland believes that the *Digital That Delivers* Programme will support and promote the development of a more resilient and competitive visitor experience sector, sustaining Ireland as a high-quality and competitive tourism destination.

Digital that Delivers, is currently investing in attractions, activities, and experience providers. This investment will result in additional economic activity of €408 million over a 10-year period, while creating over 11,000 sustainable jobs. This represents a €9 return for every €1 invested or €2 in tax returns for every €1 of public investment.

RECOMMENDATIONS

1. Educate the sector on why digital transformation is important and how it can make running a tourism facing business easier and more efficient.
2. Develop cultural tourism product outside of peak season.
3. Develop more bookable experience product, especially within the cultural tourism offer.

SUMMARY

- North Norfolk's online visitor offer is very poor.
- Without proper digital infrastructure, North Norfolk will be losing visitors and income to other destinations with better online offers.
- North Norfolk is in urgent need of digital transformation investment and support.
- Increasing bookable product across the calendar year will improve economic value and business resilience.

B7 Health & wellbeing

B7.1 THE BIGGER PICTURE

'We believe that, by ensuring that everyone in the country has access to high quality creative and cultural activities, they will, in turn, lead happier and healthier lives.'
Sir Nicholas Serota, Chair, Arts Council England – Creative Health & Wellbeing Plan, 2022

Nationally, it is estimated that businesses lose approximately £2b a month by ignoring the needs of disabled customers.[21]

People with disabilities, health conditions and impairments and their travelling companions spend around £15.3bn on trips in England each year, and given our ageing population domestically, the value of the 'purple pound' (the spending power of disabled people) is set to grow. The purple pound value is made up of:

- Inbound visitor spending by this group was £0.5bn;
- Domestic overnight visitor spending by this group was £3.2bn;
- Day visitor spending by this group was £11.6bn.

"It would be nice to have long-term projects rather than a fixed time like 6-8 weeks for example. For people with challenging lives, mental health and isolation, having something with continuity is important."
Comment from the Mapping Creative Health in Norfolk & Suffolk, Creative Lives, 2024

[21] https://wearepurple.org.uk/the-purple-pound-infographic/

B7.2 IN NORTH NORFOLK

At the last census, North Norfolk's demography data revealed that:

- North Norfolk has the highest proportion of people over 65 in the UK.
- 33.5% of the population is aged over 65, leading to low employment rates and high rates of economic inactivity.
- The number of people aged over 65 has risen by over 20% since the 2011 census.
- Over 37% of the population is retired.
- 23% of North Norfolk's population has their day to day life impacted by a disability or long-term health condition.

Of the mapped assets from the Visit North Norfolk website, 51% had no statement on their website regarding their accessibility. For the 49% which did, the statements included:

- Disabled access;
- Assistance dogs welcome;
- Disabled toilets;
- Facilities for hearing impaired;
- Facilities for visually impaired;
- Wheelchairs available;
- Changing Places;
- Autism Friendly.

The APPG for Arts, Health and Wellbeing published a report stating that participating in the arts is essential to healthy ageing, mentally, emotionally, and even physically. North Norfolk's population has a relatively high creativity participation level (43% – the second highest in East Anglia after Norwich), demonstrating the local demand for activities.

"I quite often take a carload of old ladies to concerts because they don't want to travel at night, they don't want to drive at night and they don't want to get the bus."
Stakeholder comments

B7.3 INSIGHTS

Whilst the Grey Pound certainly provides significant economic opportunity, such a high proportion of residents who are elderly and retired creates a squeeze on those who are economically active, due to higher demand for services and lower availability of labour. Elderly populations have greater healthcare needs. This has a significant impact on communities and the public purse, creating a strategic challenge of prioritising the needs of the current community, whilst supporting and anticipating the needs of future generations.

Improvements to accessibility will provide benefits to residents and visitors – boosting spend on the high street, with local businesses, and leading to happier, healthier lives.

The BeNorfolk website allows visitors to search according to whether the offer is wheelchair friendly – but that is only one type of access need. Ensuring good quality accessible infrastructure, and information availability about said infrastructure, could be a cost effective way to benefit both disabled residents and visitors.

B7.4 CASE STUDIES

Suffolk

Research analysis estimates the value of Suffolk's accessible tourism (the Purple Pound) at £303 million per year, or 20% of the total visitor economy spend. In recognition of this significant economic contribution, Suffolk Growth Company commissioned **AccessAble** to work with their visitor attractions to better support disabled visitors. The core themes were:

- Customer service.
- Information and Promotion.
- Physical Facilities.
- Public Realm.
- Transport.

"This is a timely boost for Suffolk's visitor economy. Improving accessibility and inclusivity for all across Suffolk visitor destinations is a big win for tourism but will also grow our local economy and improve resident and community well-being through inclusion."
Suffolk Growth Partnership Manager, Karen Chapman

RECOMMENDATIONS

1. Consider a programme of support for businesses to improve their accessibility information, by working with the likes of AccessAble.

SUMMARY

– The Purple Pound is an important visitor market, especially in North Norfolk.
– Targeting this audience will increase the visitor and cultural economy in North Norfolk.
– Local residents would also benefit from any improvements.
– High streets and businesses will become more sustainable and resilient through increased footfall and spend.

Further reading

Visit Britain's information on The Purple Pound can be found here.

B8 High street animation

B8.1 THE BIGGER PICTURE

"The cultural and heritage sector and natural landscape plays a unique role in creating the 'sense of place' that makes the area a great place to live, work, learn, invest and do business in. The sector is an important employer of 88,000 people and attracts significant investment from national and international funding bodies."
New Anglia LEP Economic Strategy for Norfolk and Suffolk for 2017-36

"Creative placemaking animates public and private spaces, rejuvenates structures and streetscapes, improves local business viability and public safety, and brings diverse people together to celebrate, inspire, and be inspired. In turn, these creative locales foster entrepreneurs and cultural industries that generate jobs and income, spin off new products and services, and attract and retain unrelated businesses and skilled workers. Together, creative placemaking's livability and economic development outcomes have the potential to radically change the future of…towns and cities."
Arts & Humanities Research Council 'Understanding the Value of Arts'

"Since the 1950s our towns evolved into places where retail was the primary function. Even today, this sector is still the largest private employer in the country. But a significant contributor to the struggles many high streets face today is how retail has changed over this period. In 1971, 70% of retail sales were generated by 29,000 retailers, yet changes in pricing legislation allowing stores, not manufacturers, to set prices fuelled the rise of chain stores. In less than 30 years this transformed the sector, and by the year 2000 70% of retail sales were generated by just 100 retailers. Out-of-town retailing and the internet have resulted in the closure of many big high street names, causing places to lose their purpose. This loss has far-reaching social ramifications. Once a town's raison d'etre is removed, the community connection falls away, resulting in a loss of civic pride, of jobs and entrepreneurship, of social spaces to commune."
Making The Most of High Street Investment, Institute of Place Management 2024

- 65% of locations are held back by a lack of a compelling vision that is shared by local people and businesses.
- 60% of towns visited by High Street Task Force experts did not have an activation plan and were not running sufficient activities, events and festivals to attract people in to use their town centre.[22]

B8.2 IN NORTH NORFOLK

North Walsham's High Street Heritage Action Zone showed that:

- **Cultural investment delivered 50% footfall increases.** From 8,258 in May 2022 to 12,482 in May 2023 when the HSHAZ programmed creative activity.
- **67% of people say they are now more likely to visit their high street due to the cultural activities.**
- **79% of attendees reported visiting other shops, businesses, and services on their high street**, promoting local economic growth.

[22] Making The Most of High Street Investment, Institute of Place Management 2024

It is worth noting that these achievements were delivered from a standing start in a town with limited cultural infrastructure and where finding cultural champions and partners was initially a challenge.

"There's a really strong sense of place and there's a really strong sense of partnership, but on a very small, local level."
Stakeholder comment

"We are the night time economy in Wells. There is nothing else apart from pubs or members' clubs. We are the only place offering high quality entertainment twelve months of the year."
Wells Maltings

B8.3 KEY INSIGHTS
(through the lens of economic growth)

Place activation is key to driving footfall, bringing a broad section of the community into town and generating spend - but also to generating confidence and building civic pride.

The Rites of Spring Festival in North Walsham was organised by local business owners, inspired by the HSHAZ cultural programme, stating *"we wish to declare North Walsham town open for business and pleasure…and mark a new beginning for North Walsham"*. To have engaged and motivated local business who understand the importance of place activation is a gift. It is imperative that the work in North Walsham is supported to continue and grow.

Having cultural and creative capacity is an essential ingredient within place activation. Town centre animation is often the role of a Town Council's Events Manager, Town Centre Manager, a BID, or a Town Team independent of the local authority.

B8.4 CASE STUDIES

Holt – culture-led high street animation

With its attractive historic townscape and plethora of independent shops and art galleries, Holt is a destination despite not being on the coast. The Holt Festival is well supported locally, as the businesses and communities understand the importance of cultural programming to bring businesses to the town and build community pride.

"If you are looking for a quiet time in the countryside, this is not it. If you're looking for cultural nourishment, belly laughs and the pleasure of seeing top-flight internationally recognised performers, you're in the right place."

"Holt hasn't got a particularly big cultural offer in its purest sense, but it's got a lot to satisfy cultural tourists; vintage shops, a vinyl basement, lovely independent cafes and lots of charity shops. All of that is really cute."
Stakeholder comments

Sheringham

Sheringham is an active town with a busy community-led but visitor-facing events calendar (which draws on the town's heritage stories). The 1940s Weekend was regularly attracting visitor numbers of over 40,000 pre-Covid, and is back up to 20,000 as of this year. Such is the number of visitors that the local main line railway that has a station in Sheringham puts on extra trains. The event is funded by voluntary donations from local businesses. This demonstrates that they recognise the benefit and return on investment from bringing thousands of visitors to the town, and spending money.

Accommodation providers in a 5-7 mile radius of Sheringham are fully booked, and many book up to a year in advance with repeat visitors. The local Chamber of Trade runs a 'Ration Book Competition' to encourage visits to businesses. Every year, the 4,000 printed ration books are used without fail, and the scheme is very popular with the local businesses. The local businesses rally behind the weekend, with local restaurants running 1940s-themed menus, window dressing, and staff in fancy-dress.

Importantly, the event takes place outside of the peak tourism season which provides a much-valued economic boost to local businesses. This is an excellent example of an event which acts as a catalyst to bring people together and build relationships that foster further collaboration to develop the local economy.

Foodie Friday

Foodie Friday is a monthly street food event that regularly attracts thousands of people to Stockport Old Town each month. The event features 15 street food traders, alongside a number of indoor market traders who adapt their traditional offer to meet the demands of a night-time visitor profile. It generates c.£500k per annum for the local economy and is credited as being the catalyst behind Stockport's regeneration. Stockport is now lauded as 'the new Berlin'.[23]

[23] https://www.theguardian.com/travel/2022/dec/15/stockport-greater-manchester-guide-shopping-pubs-art

RECOMMENDATIONS

1. Work with local town and parish councils to develop and diversify their high street animation.
2. Look at place partnerships and models, involving businesses and the local community.
3. Consider creating a role responsible for place animation such as a district-wide town centre manager.

SUMMARY

– The roles of high streets are changing and there is increased need for leisure activities.
– Cultural animation and regeneration are proven tools for high street improvement.
– North Norfolk has trialled this in North Walsham with some success.
– NNDC could implement shared staff resource to activate its high streets, creating a focus on increasing civic pride – and spending in local businesses – for relatively low outlay.
– Residents, visitors and businesses would experience economic and social benefits from this investment.

Further reading

– The DCMS Culture White Paper is here.
– The High Streets Task Force has lots of insight and case studies here.
– The Local Government Association's Toolkit for Town Centres is here.

C1 Conclusion & next steps

C1.1 CONCLUSION

"I don't think that the district council has got a handle on the arts and heritage one bit. There is a massive perception gap. It's a massive blind spot."
Stakeholder comment

Using a wide variety of qualitative and quantitative data, we have been able to establish that tourism is clearly already a major driver for economic growth in North Norfolk. Culture is also a significant driver, but this is more difficult to evidence due to lack of 'hard' data collection both locally and nationally.

Taking both sectors combined, they represent nearly 23% of all employment in the district – an extraordinary number and one which NNDC should take very seriously. Indeed, a focus on developing the cultural economy and cultural tourism product, would increase the value of the existing tourism economy by attracting visitors with higher spending power and inclination.

Both sectors are inhibited in their potential economic impact and value due to lack of strategic and effective economic development support. The sectors also lack support to secure inward investment into North Norfolk, meaning that the district is missing out on national / strategic investment opportunities and the associated economic benefits.

However… North Norfolk is currently not eligible to apply for strategic inward investment programmes from the likes of Arts Council England due to the lack of a Cultural Strategy. This is a mandatory requirement of Arts Council England for any area seeking to apply for its strategic grant pots.

Therefore, North Norfolk District Council's lack of focus on the economic growth of this sector is in fact preventing North Norfolk's cultural sector from securing strategic inward investment and generating the greatest economic value for the area.

In order to gain a true and accurate picture of the full economic value of culture and tourism in North Norfolk, a full economic analysis would need to take place. This would need to work with individual organisations and businesses over at least a year to gather primary data, including:

- Footfall / visitor figures / total attenders.
- Place of origin.
- Overall income and expenditure.
- Direct and indirect spend per head .
- Motivations for visiting.
- Number of FTE employees.
- Number of volunteers and hours donated.
- Square footage of venues.
- Accommodation capacity.
- Industry classification.

From this, an overall understanding of the direct economic impact of culture and tourism in North Norfolk could be ascertained.

Additionally, the culture and tourism sectors have well documented wider and indirect impacts which could be measured. These include:

- Civic pride and sense of belonging;
- Education and skills;
- Talent attraction and retention;
- Health and wellbeing;
- Place perceptions;
- Innovation;
- Cluster effects;
- Regeneration;
- Quality of life and life chances;
- And many more…

A supporting dataset is appended to this document, which is the source of the selected mapping information included in this report.

C1.2 SHORT-TERM ACTIONS

The absence of a cultural partnership, and a cultural strategy, is preventing North Norfolk's cultural sector from securing inward investment and generating the greatest economic value for the area.

Any cultural strategy needs to be developed, owned and delivered by a range of partners and stakeholders, not just the local authority (even though it will almost certainly be the lead partner and convenor). **A place-based cultural partnership or network needs to be established**, its ambitions understood and shared by all participants, and have time to establish. **This is the first step on the critical pathway to delivering economic growth through culture and tourism.**

The resulting impact on collective visibility, engagement and partnership will help to build a more resilient and strategically-focused network of cultural and creative partners. NNDC can support, enable and facilitate much of this work as an equal partner, ensuring that the work closely aligns with the district's aims for economic growth and prosperity.

Without this foundational work, NNDC does not have the full information – or the mandate from the sector – to develop a cultural strategy.

Once there is a network of partners with appetite and willingness to work collaboratively to achieve a transformational change, a cultural strategy can be commissioned which is developed using co-design, co-production and co-delivery methodologies… and deliver the greatest (economic) impact for North Norfolk.

A cultural strategy for North Norfolk could further explore and interrogate many of the opportunity areas highlighted in this report, such as:

1. Exploring opportunities for localised, co-ordinated place-based cultural activities. In particular, recognising the role of towns to serve as platforms for cultural events and activities.
2. Supporting culture & tourism businesses with digital. transformation, improving their digital presence and ability to generate income.
3. Increasing cultural tourism product in order to grow the value of the visitor economy, and better disperse visitors across the district and seasons.
4. Positioning North Norfolk within the wider county / region's cultural offer and ensuring its cultural organisations maximise their benefit from shared schemes such as Head East.

5. Supporting local residents to improve their health and wellbeing through participation in cultural activities. This may include promoting and providing support to businesses to better position (and/or address) accessibility issues.
6. Understanding the potential for increased crossover and referral of audiences between cultural venues by analysing audiences and box office data.

These are areas which have come to light through this feasibility process. There will no doubt be more areas of need and development which arise through a thorough strategy development process.

"My hope primarily would be that we'd receive more good quality applications for funding programs to the Arts Council. We want to prioritise money going out to North Norfolk to see lots of good quality work in the arts happening across the region. There's a really good foundation there; they've got a record of success that can be built on, and they do have a strong community of practitioners in that area - not everywhere has that. Those are strengths which they just need to build on. But it would need a bit of a structural foundation for them to get going with that."
Arts Council England

Additionally, **there is a clear need for digital transformation** – but NNDC cannot do this alone. This action should be a partnership commission across Norfolk, possibly East Anglia. (Our previous work in Suffolk also identified this need for the cultural and tourism sectors.) Commissioning a digital transformation programme would support the cultural and tourism businesses to develop their digital offer – through website upgrades, online booking systems, connected distribution models and more. It is a programme of work which is becoming increasingly urgent in order to remain competitive.

"Although the economic benefits of arts and culture have been central to the case that has been made for public funding, the report questions the significance, and at times the quality, of economic impact studies. It calls for more attention to be given to the ways in which arts and culture feeds into the creative industries, supports the innovation system, and attracts talent and investment to places. Here, it is argued, are the distinctive contributions of arts and culture to the economy and they need to be better understood."
Arts & Humanities Research Council 'Understanding the Value of Arts'

C2.3 LONGER TERM AMBITIONS

Once a stable foundation and partnership is in place, NNDC should commission a cultural strategy. The strategy should:

- Prioritise support for development of the cultural and creative economies.
- Employ a holistic understanding of 'culture', including both the grant-funded and commercial sectors, and including freelance practitioners.
- Responding to the particular needs of the local population should be the foundational focus of the cultural strategy – working across health and wellbeing, placemaking, skills, jobs and talent development.
- Cultural tourism will be a core theme and outcome: understanding culture as an economic driver for tourism, and developing suitable infrastructure and product for the target audiences.
- Look beyond district borders and appreciate the interrelationships with other areas of Norfolk.
- Understand what foundations need to be in place in order for the strategy to succeed: active partnerships, sector capacity, a shared willingness to change and improve, a shared appetite to increase leadership and build capability.

D Addendum

D1 BIBLIOGRAPHY

This is not an exhaustive listing, in part as source material is continually being added to as part of the process. A wide range of media articles, corporate updates, posts and newsletters, and other reviews (from local businesses to parliament) have also been a part of the desk research.

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D2 CASE STUDY COMPARATOR

Lowestoft – the leading light

Lowestoft in East Suffolk is famous for fish fingers, fun and now; first light. The first step was bringing together a variety of stakeholders in the town and working collectively to understand the regeneration opportunity. This led to the development of a Cultural Strategy, a Town Board, and Vision for the town and a Town Investment Plan.

A focussed programme of regeneration, led by culture and heritage, has resulted in £millions of investment – with much more to come.

- £24.9m of Towns Fund investment includes the redevelopment of the Cultural Quarter and the Heritage Quarter
- First Light Festival attracts over 40,000 visitors annually, with visitors spending an average of £30 on site, £20 in local businesses and £80 in local accommodation. In 2023, 100% of Lowestoft's accommodation providers were fully booked during the festival period, and many were already fully booked for the 2024 event.
- Lowestoft was one of only seven places in the country to benefit from two Heritage Action Zones.
- This inspired a place brand, which has directly informed strategies in economic development, tourism and culture in Lowestoft and across Suffolk.
- Three Enterprise Zones have leveraged over £43m of public and private sector investment, creating 900+ new jobs to date
- In 2022, First Light Festival CIC and the Seagull Theatre became Lowestoft's first National Portfolio Organisations, and will receive annual funding between 2023-2026.

Further reading can be found here.

Images courtesy: First Light Festival and Malachy Luckie, Mykola Romanovsky.

For more details contact
Alex Saint
Director

Amy Lewis
Place Consultant

Andrew Palmer
Client Director

alex@ctconsults.com
amy@ctconsults.com
andrew@ctconsults.com
+44 (0) 161 228 7512

ctconsults.com
creativetourist.com
culturehosts.co.uk

ctconsults.