

**LarkingGowen.**  
*Chartered Accountants*



2018

# Tourism and Leisure Business Survey



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## OPINION

When I look at old photographs and reflect on what has changed around me, I always ask myself whether what I am seeing is what I would have envisaged, or is the reality completely different to what I might have imagined?

Whilst we don't have a crystal ball, we should reflect on the here and now and consider ways to meet future customer needs.

To spot opportunities but change nothing, or stall, is potentially more dangerous than making no effort to second guess the future.

Change happens all the time, some aspects slowly and some really quickly. I guess the question is, are we ready for the change, embracing change, and on our toes to act quickly?

Reflection on change can be followed through the years in our musical choices. Bob Dylan in 1964 wrote:

*For he that gets hurt will be he who has stalled  
There's a battle outside and it's ragin'.*

*It'll soon shake your windows and rattle your walls*

*For the times they are a-changin'.*

This year will see massive change. Our high streets will see fewer of the larger food chains such as Prezzo and Jamie Oliver's amongst others.

It is a confused market, as some large organisations move away from a foodie bias towards a traditional pub-like experience. Yet this is at a time when the demise of the "local" continues. With hundreds of pubs still closing each year, further change will happen.

The rise of Airbnb brings visitors to some unusual tourism destinations in suburban areas, as well as competing in the mainstream hotspots. The anecdotes of a minority with potentially-inadequate insurance, of poor quality and with potential tax avoidance aspects exist but the reality is that customers who choose these options are eating into our market.

So are we ready, moving forward against the tide? I think the answer is yes.

As with all markets some areas are doing less well than others and this survey shows that it is not plain sailing, but another good year has been had, investment continues and we are certainly a location "on trend" due to the hard work of our regional marketing bodies and the (growing number) of local Destination Marketing Organisations (DMOs) who have done a great job over recent years to raise our region's profile.

There is still room to grow and neither the businesses nor the DMOs must become complacent.

Tourism and leisure does not just happen. Communication is key, and it is the responsibility of the business and the DMOs to engage with each other.

We simply cannot afford disharmony or a lack of understanding or indeed under representation.

We need to be ahead of the curve, and together I firmly believe we are stronger, because one thing is for sure ...for the times they are a changin'.

# Is it all good news for the region?

With the tourism and leisure sector so important to the economy, it is great news that once again the majority of businesses (62%) reported increased turnover in 2017; although 19% saw turnover decrease.

Despite costs rising, 44% of businesses saw profits increase (down from 56% last year) while 29% of businesses suffered a decrease in profitability in 2017.

So does this mean the sector is in decline? Not a bit, it would seem, from the responses given, with 67% of businesses anticipating increased turnover in 2018 and 51% an increase in profitability for the same period.

Falling turnover was anticipated by 9% of businesses while 21% anticipated that their profits would fall in 2018. These markers are set against a backdrop of hard work as 52% reported working longer hours than five years ago and 58% said they were more pressured than five years ago.

Staff welfare is something close to our hearts at Larking Gowen, where a well-being programme has been in place for some time. But are business owners looking after themselves as well as their teams? Wellbeing schemes were in place in 54% of businesses while 8% planned introducing them in 2018.

Staff are key to the success of the sector. The survey saw 35% of businesses increasing full-time staff while 40% increased part-time staff. Clearly the sector is still seasonal and this flexibility is quite attractive to many. There is a tainted view of zero hour contracts and, while it is important this flexibility is not abused, we found that of the 51% of participants who employed staff with zero hour contracts 28% provided an average of 21 hours or more per week, while 57% offered 11 to 20 hours and only 1% offering less than five hours average. Clearly this is sector and business specific, but any political moves to regulate this area could be damaging for some.

On page 9 we take a look at the positives coming from the National Living Wage (NLW) and National Minimum Wage (NMW) regulations. This year, 45% of businesses (up from 39% last year) indicated that the NMW had a negative impact on their business while 47% (up from 40%) indicated the NLW had a negative impact.

With annual increases, businesses have to take action, and while a third of

CHRIS SCARGILL, tourism partner with Larking Gowen, chartered accountants and business advisors, finds out how the tourism industry is faring and reflects on this year's data.

businesses had not decided what action to take for staff paid above these thresholds, 13% indicated they would match any rises across the board. While 6% indicated a potential pay freeze, 14% planned below-inflation increases to staff pay.

On top of NMW/NLW changes we have recently seen the introduction of auto enrolment to the majority of businesses in the sector. Worryingly, 28% of employers indicated that up to 5% of staff had opted out, while 15% suggested that over half their staff had not joined their schemes.

With further increases in contribution for both staff and employers, these trends, sadly, may increase further. As to the cost, 31% of businesses had factored the increases into their budget, while 6% would be making sacrifices in other areas of spend and 12% suggested their plans to increase pay would be adjusted to accommodate the pension cost increase, which maybe misses the objective.

Raising the profile of our sector involves targeted marketing and we look at online marketing on page 21. With 32% of businesses investing over 5% of their turnover in marketing it is important that it is effective. Social media is dominant in today's society and, while it can be costly for many businesses, it can be a low-cost option for others. It was therefore pleasing to see an increase in the number of businesses this year saying that social media had a significant benefit (24%) for their business, up from 19% the year previously. This came on the back of potentially less use by some businesses of the main tools, with Instagram being the only product in our survey to show an increase in users in comparison to the previous year.

Overall, the number of Facebook users showed a marginal decline (down by 7% from 2017 to 89%) but 69% of users said they had been more active on Facebook than the previous year.

I am a keen supporter of collaboration as we are stronger together and our Destination Marketing Organisations

(DMOs) and regional marketing teams are bringing success to the area. But, despite the success stories and funding projects we have shared on pages 27-29, 83% of businesses still say there is not enough support for the sector. Communication is key and an area to be worked on by both businesses and the DMOs themselves, with 12% of businesses indicating they did not know what the DMOs do. Pleasingly, though, 53% of businesses are now engaged with a DMO and an impressive 29% are involved in more than one, while 72% of businesses agreed that promotion of their area was either good or very good (up from 40% the previous year).

There are fears – for succession, for new taxes. The suggestion of introducing bed taxes is a fear for 54% of businesses who anticipate a negative impact to our region.

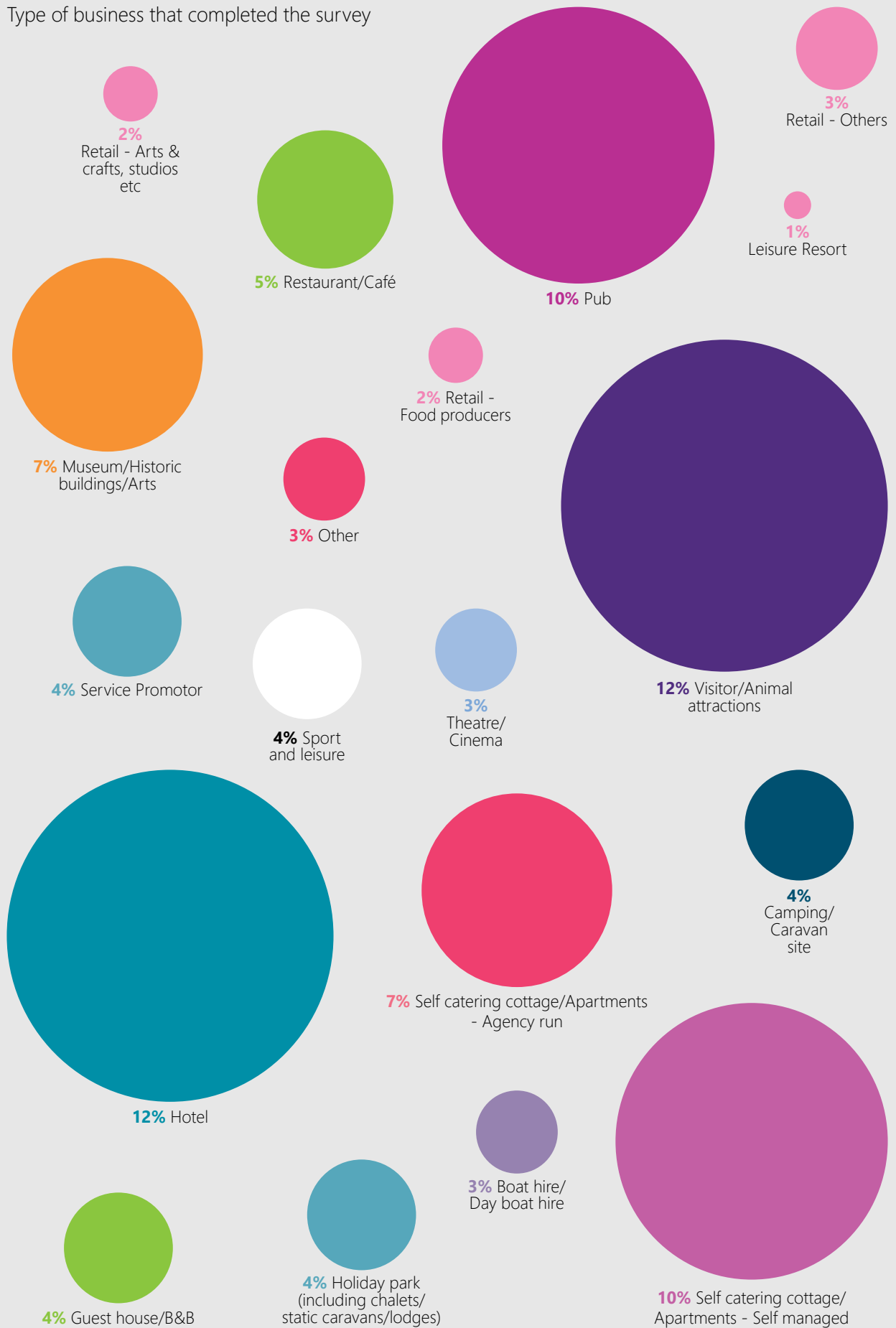
Half of businesses say lack of certainty about Brexit is having a negative effect.

No one doubts the need for the Government to raise income, and taxation does this, but there is evidence to show that a reduction in VAT rates on tourism, creating a more even playing field with our European neighbours, would help grow the economy. Our survey suggests 48% of businesses believe current VAT rates are not helping the sector. A growing number of businesses were more pessimistic about the future. But let's hope the optimists are right, as year on year growth of the tourism and leisure sector is key to the economic regional landscape. Yes, there are challenges with more customers sticking to budgets and the habits of booking later, but there are opportunities with 39% investing in additional PR and 57% investing in site improvements. So, 2018 and beyond will therefore be very interesting. Luck – yes occasionally we need some – but those in the sector are working hard so hopefully we can maximise opportunities that come our way.



@CScargillLG

Type of business that completed the survey





Tourism businesses have been looking at some great ways to keep their business in the news. We find out more about how sponsorship, new ideas and the celebrity factor are helping the industry.

# Teaming up to stay on right track

The National Cycle Network (NCN) supports more than 15,000 jobs and directly contributes £650 million to the economy each year.

Stretching to all four corners of the UK, the network covers more than 14,000 miles. The economic benefits of the NCN since 1995 are estimated to be £7.3 billion, with health benefits accounting for £6 billion.

The group says: "We conservatively estimate that people who use the network for holidays and day trips spend an average of £7 a day, although this figure is likely to be even higher for people who take cycling holidays."

With so many initiatives encouraging people to get on their bikes these days, Adnams has been at the forefront of promoting the sport across our region.

Through its sponsorship of the men's and women's Tour of Britain, the Suffolk business has been able to encourage people to get involved with fun routes alongside the professional races, thus boosting regional tourism with visitors coming to Suffolk to watch the events.

Adnams was approached by tour organisers Sweetspot in 2011 to get involved with the Tour of Britain.

Victoria Savory, marketing manager for Adnams Hotels, Pubs and Shops, said: "The timing was perfect. Sweetspot's approach coincided with an increase in national publicity about cycling and lots of Government-led initiatives to encourage the country to start cycling. We also liked the inclusivity of cycling, the fact anyone could take part.

"Cycling was growing as a national sport with relatively few brand associations, compared to other sporting events with very strong brand sponsorships. We felt like the planets aligned for us to get involved."

The other side to the coin from the point of view of the brewing company is that cyclists often combine a ride out with a stop for drinks and snacks in the morning and at a pub for a weekend lunch with a culture of so-called cycle hubs.

This year's Women's Tour will be on July 1, the Men's Tour on September 8.

Both will include mass-participation events for members of the community and beyond, as well as the chance for spectators to watch the sport in the seaside setting, all a great way to boost the local economy.



**IN THE SADDLE:** Cyclists head through the centre of Southwold during last year's tours.



## Are we doing enough?

Are we doing enough to tap into a growing trend for cycling tours?

Andrew Patton (pictured) started Cycle Breaks in 1991 in response to wanting to create a niche holiday experience. Specialising in self-guided cycling holidays and bike tours in the UK and mainland Europe, the company arranges the itineraries, transfers your luggage and will kit you out with a good-quality bike as well as provide mechanical assistance en-route should your bike need some TLC.

The Suffolk-based company has noticed a growing trend for small groups of cycling enthusiasts.

Andrew said: "There is a growing demand from customers who want to tour

using their own equipment and who are looking for more of a challenging tour of 50-100 miles per day.

"Whereas the traditional cyclist looks for a more sedate tour of around 20-25 miles per day, taking in heritage sites with regular stops at pubs and tea shops.

"The growing trend to bring their own equipment will present challenges in the sector. In particular, accommodation and food and drink providers will need to consider storage for expensive cycling equipment."

He notes this change gathered speed after the 2012 Olympics and thinks sporting events like the Tour of Britain also help to promote this region as a good place to do a cycling break.

# Plugging a gap in the market

A unique service giving more people access to the world of boating is marking its first year in business.

Essex-based Borrow a Boat, the UK's first peer-to-peer yacht charter platform, was launched at the London Boat Show in January 2017. The company is looking to the future following a very promising first year.

It has been growing fast and currently lists more than 13,000 boats in 60 countries.

The business has also found time to complete two successful rounds of crowdfunding to cement their position at the forefront of the new yacht charter sharing economy.

The service is opening up boating, making it more flexible and accessible, providing sailing holidays all over East Anglia and further afield, including the Mediterranean and Caribbean.

Having met boat owners across the globe who shared the frustrations of high running costs and minimal time spent on board, as well as the tedium of visiting the same location, entrepreneur Matt Ovenden decided to create the UK's first boat charter platform which not only offered sailing yachts but also motor yachts, river boats and RIBs, that are more accessible and at



a reduced cost to their competitors.

Affordability, accessibility and maximum choice and flexibility are the core philosophies of Borrow a Boat and key accelerators of the global sharing economy that the platform champions.

Borrow a Boat offers flexible duration

bookings and time on board, short stays, long trips and last-minute bookings, a unique selling point for the platform's customer base who seek experiential travel that suits their lifestyle and is currently looking for more boats in our region.

## THE CELEBRITY FACTOR

### CASTLE ON THE HILL

Publicity generated by singer/songwriter Ed Sheeran (pictured) was a big factor in what promises to have been a spectacular season for Framlingham Castle.

Visitor numbers for the 2017-18 season are anticipated to be about 100,000, roughly 15% up on budget, said Kirstie Horne, property manager at the English Heritage Suffolk attraction.

A new café at the castle – part of a £1.2m conservation and improvement investment – also helped, as did a very popular



6.5 metre chute installed during conservation work so that visitors could easily slide back down to the inner court from the wall.

However, English Heritage had not anticipated January 6, 2017, the date superstar Sheeran released his new single, Castle on the Hill. He had named the song after the castle in Framlingham, the town where he grew up. The lyrics reflect on his boyhood and teenage years in the town and include the line: "We watched the sunset over the castle on the hill".

From the moment the song was released, things changed, according to Kirstie.

That evening The Tailormade, crowned London's best buskers, drove down to Framlingham from London to recce the castle and at 8.30am the next morning filmed a cover version of the song there.

It proved to be the shape of things to come.

"As well as our usual families with kids, and grandparents with grandchildren, we started to get lots of people in their late teens to mid-20s," Kirstie said. "One couple drove all the way from Blackpool for a look, and then drove home again! The whole demographic of our visitors changed."

The castle invested in a couple of cardboard cut-out Eds to give him a presence. "We're still getting people coming because of the single," Kirstie added.



### THE ONLY WAY IS ESSEX

The huge success of TV reality show TOWIE has had a major impact on visitor numbers to Brentwood.

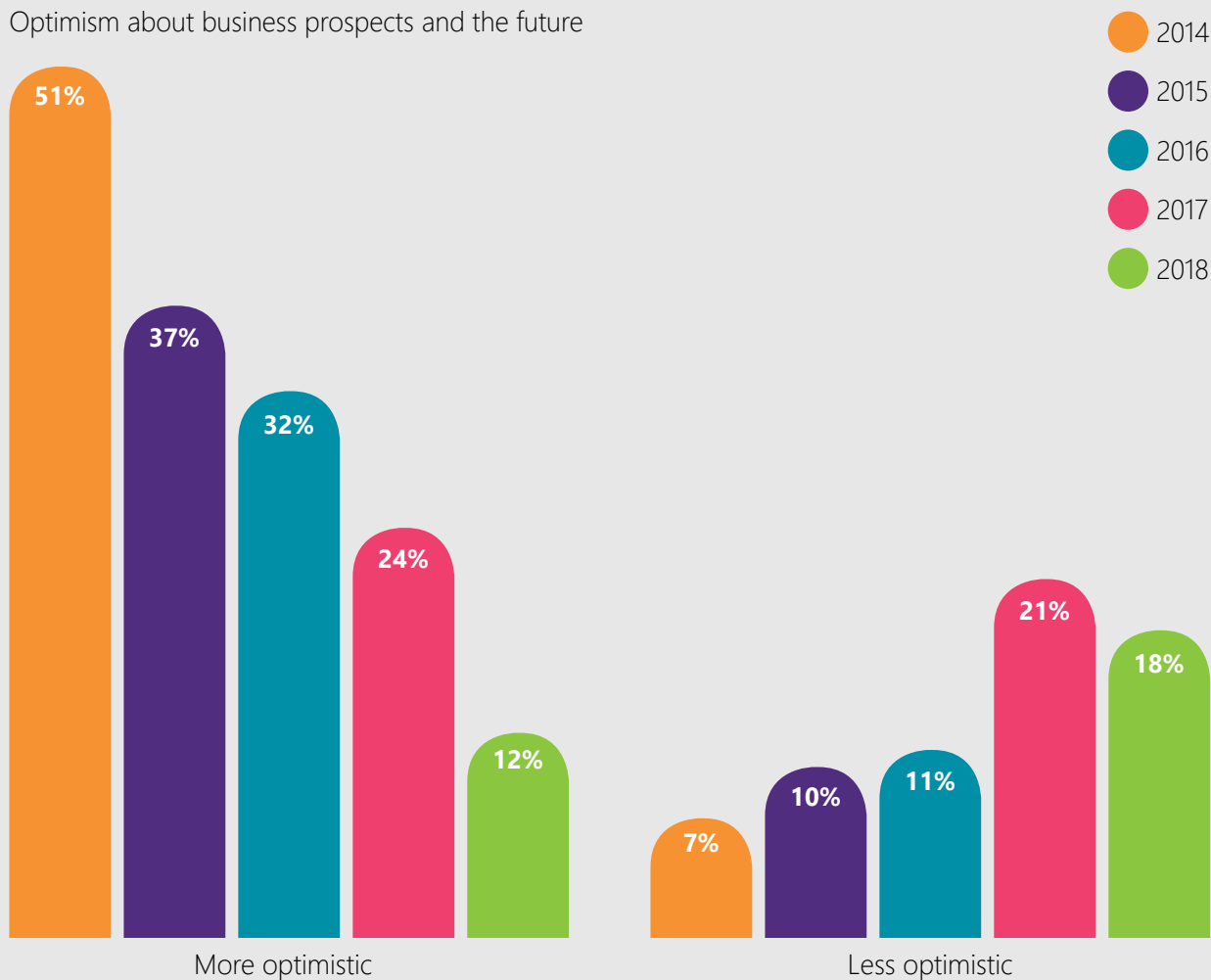
Hotel occupancy rates in the town rose from 54% to 97% in 2010. Nine of TOWIE's stars set up shops, boosting the town's trade and Brentwood still draws the crowds to see familiar TV sights, including the Sugar Hut nightclub (pictured).

Lisa Bone, strategic tourism manager for Visit Essex, said: "They're still coming by the coachload, largely from places like Newcastle and Manchester. People come on hen and stag parties to do TOWIE tours.

"My role is to ensure that the area capitalises on the TOWIE success but also to show that there is so much more to Essex including history, heritage, art, beautiful gardens and culture."



### Optimism about business prospects and the future



Which of the following measures are you planning to implement in order to improve performance and grow your business?

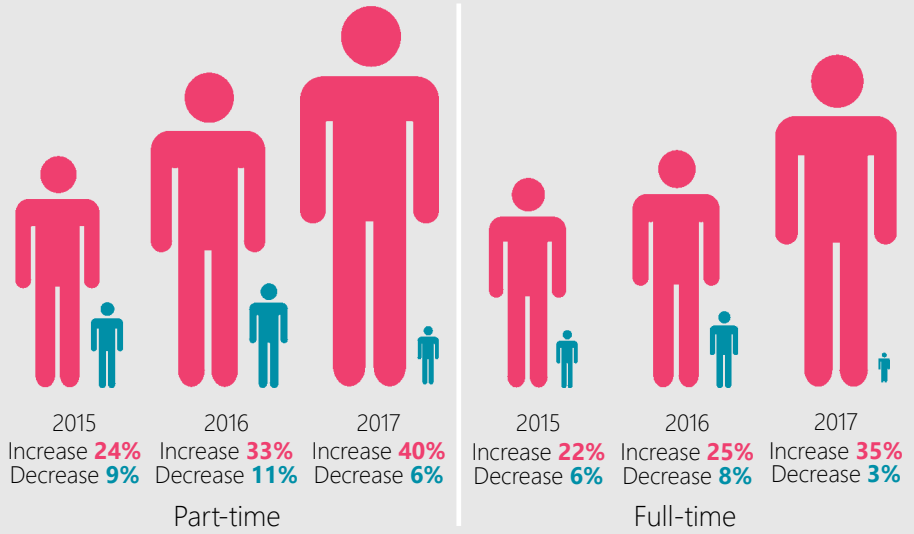


Do you employ staff?

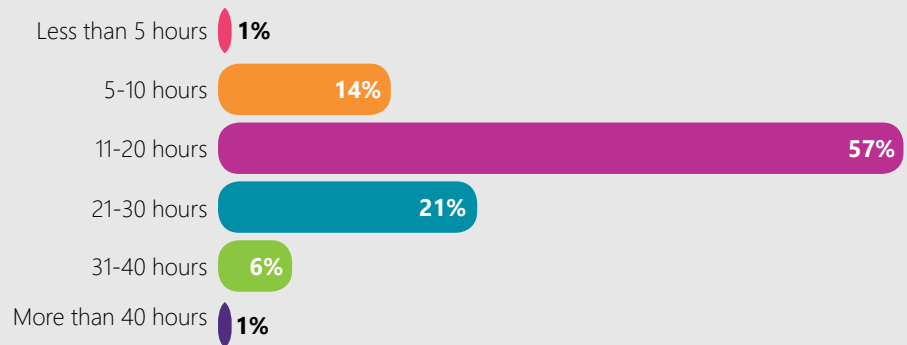


**51%**  
employ staff on zero hour contracts

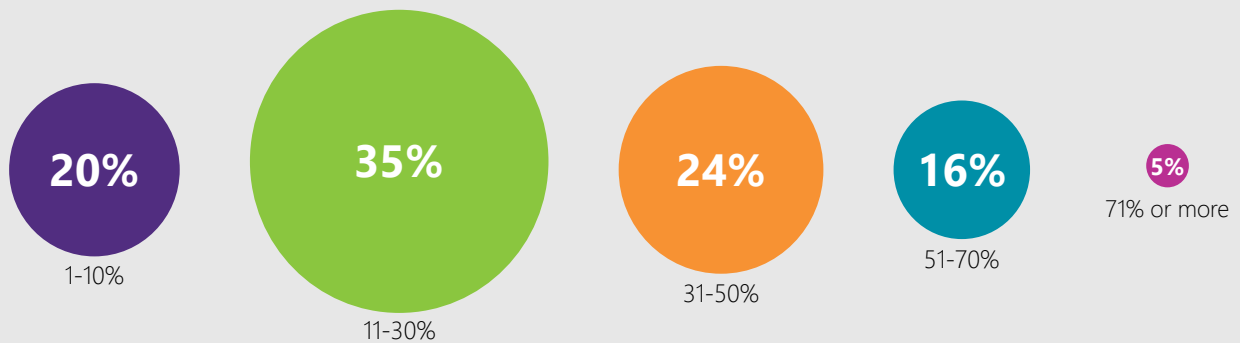
How did your full-time/part-time staff numbers change?



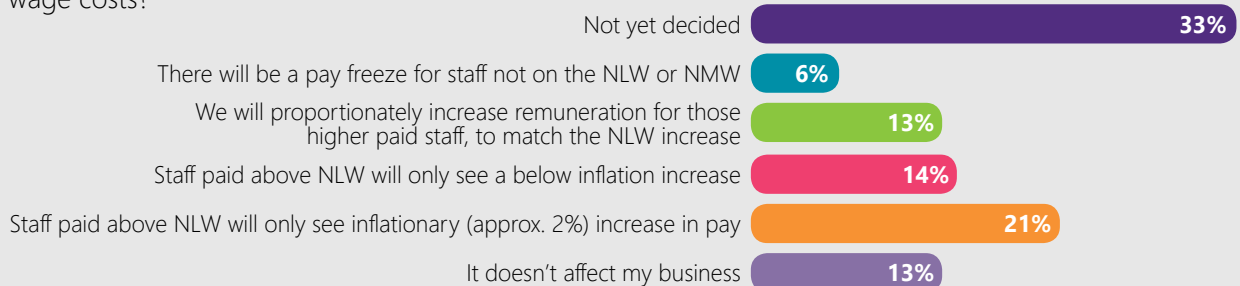
How many hours on average do staff on zero hour contracts work per week?



What percentage of your staff are aged 18-24?



With the introduction of the National Living Wage (NLW) for over 25's moving to £7.83 in April 2018 (an increase of 4.4%), and with the National Minimum Wage (NMW) increasing too, how will this affect your wage costs?





# NMW – let's look at the positives

According to the Low Pay Commission, nearly half (46%) of all low-wage employees work in two sectors – hotels and restaurants, wholesale and retail.

So any Government-led initiatives to make changes to address these will have an impact on the tourism and leisure sector.

With many staff entitled to either the statutory National Minimum Wage (NMW) or/and National Living Wage (NLW), the annual increase is inevitably going to have an impact on the sector's performance and ultimately the bottom line.

April 2018 saw the rates rise by over 4%-5.4% so, against a backdrop of UK inflation rate of around 2.5%-3%, for many businesses the impact is significant.

These changes also come at a time that auto enrolment has been introduced. While the focus is on employee engagement there are cost implications for businesses who also have a contribution element, adding a further cost.

Ingo Wiangke (pictured), managing director of Country Operations for TA Hotel Collection, says that his group have looked at matters differently and have challenged themselves to look at the positives from the Government's introduction of the NMW. But equally he thinks there is more the Government could do to stop the constant

squeeze on the industry.

"Personally, I think we have to turn the National Minimum Living Wage (NMLW) into being a good thing," he said. "We have been looking at it from a different angle.

The hospitality industry has had a bad image of low pay, unsociable hours and working during traditional holiday times but now we can look to change those perceptions."

Taking up some initiatives around employment, the TA Group had looked at the market and simplified the remuneration structure it offered, removing some of the lower age related bandings within the NMW regulations, on the basis this provided a fairer remuneration structure and made their employment offering more attractive.

With salaries being equal across many business sectors as a result of the legislation, he feels that the tourism, leisure and hospitality sector can appeal to a wider range of candidates, and to some that may have overlooked the sector previously.

"As we are paying more we should look to attract a higher calibre of person, people with marketing or business degrees who can now consider the industry as a career step."



He said the higher wages can make staff happier, and happy staff means there may be less retention issues and lower turnover of staff. "We are looking at recruiting the right people into the right positions and instilling a service culture of highly-skilled and highly valued people," he said.

Ingo has a passion for the sector and this he says is replicated throughout his whole team. He sees all staff as an important element of the group's offering and that they all have a key role in the customer experience, so being motivated and engaged adds value to the business.

He does feel that by looking at things differently the TA Group has engaged with the higher costs and focused on providing beneficial and better apprenticeship schemes engaging and developing the careers of those they employ. "It's a win-win situation," said Ingo, adding that there needed to be a good management structure in place for training.

He also felt there was more the Government could do to help the industry. "We have been and are still being squeezed with high business rates and VAT, which is higher than many of our European contemporaries," said Ingo. "The Government needs to look at the industry and say 'what can we do to help?'".

## FEELING THE IMPACT

Camplings Linen, a family-owned laundry business based in Great Yarmouth, has some 300 customers in Norfolk and Suffolk, most of whom are in the hospitality and tourism sectors.

And, like their clients, they are feeling the impact of rising wage bills.

During peak times, Camplings Linen employs about 150 people, two thirds of whom qualify for NMLW (NMW plus NLW).

Managing director Richard Turvill says, to date, the business has managed to absorb the statutory increases, safeguarding jobs, while turning a profit and delivering a quality, reliable service.

In January last year, the company unveiled a new commercial laundry, capable of processing up to 500,000 pieces of linen every week. Representing a £5 million investment, it uses the latest technology, software and chemistry.

"Since opening, we've greatly improved



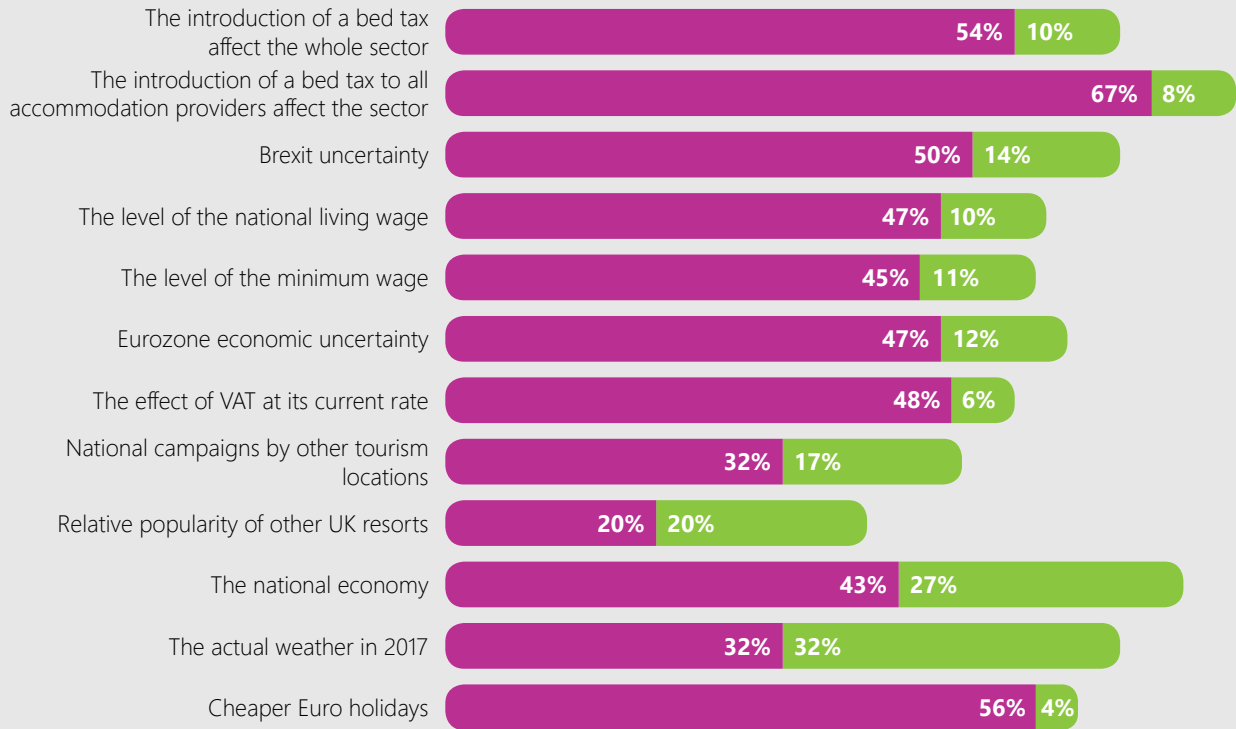
our productivity, efficiency and capacity. But when looking for areas to streamline, and cut costs, we're as productive and operationally efficient as we can be. Our only option for managing rising wages, without losing staff or sacrificing quality of our service, is to consider price increases. We always take the long-term view, and remain focused on delivering the best service we can. That might mean profits will take a hit in the short-term."

Managing staff expectations has also been tricky. "Because the NMLW is awarded to people over 25, we've had other staff querying why they're not entitled to a 4.4% increase too. It's a fair question. We have always been transparent and fair, paying people for the role they perform, not their age. But the NMLW regulations take this matter out of our hands.

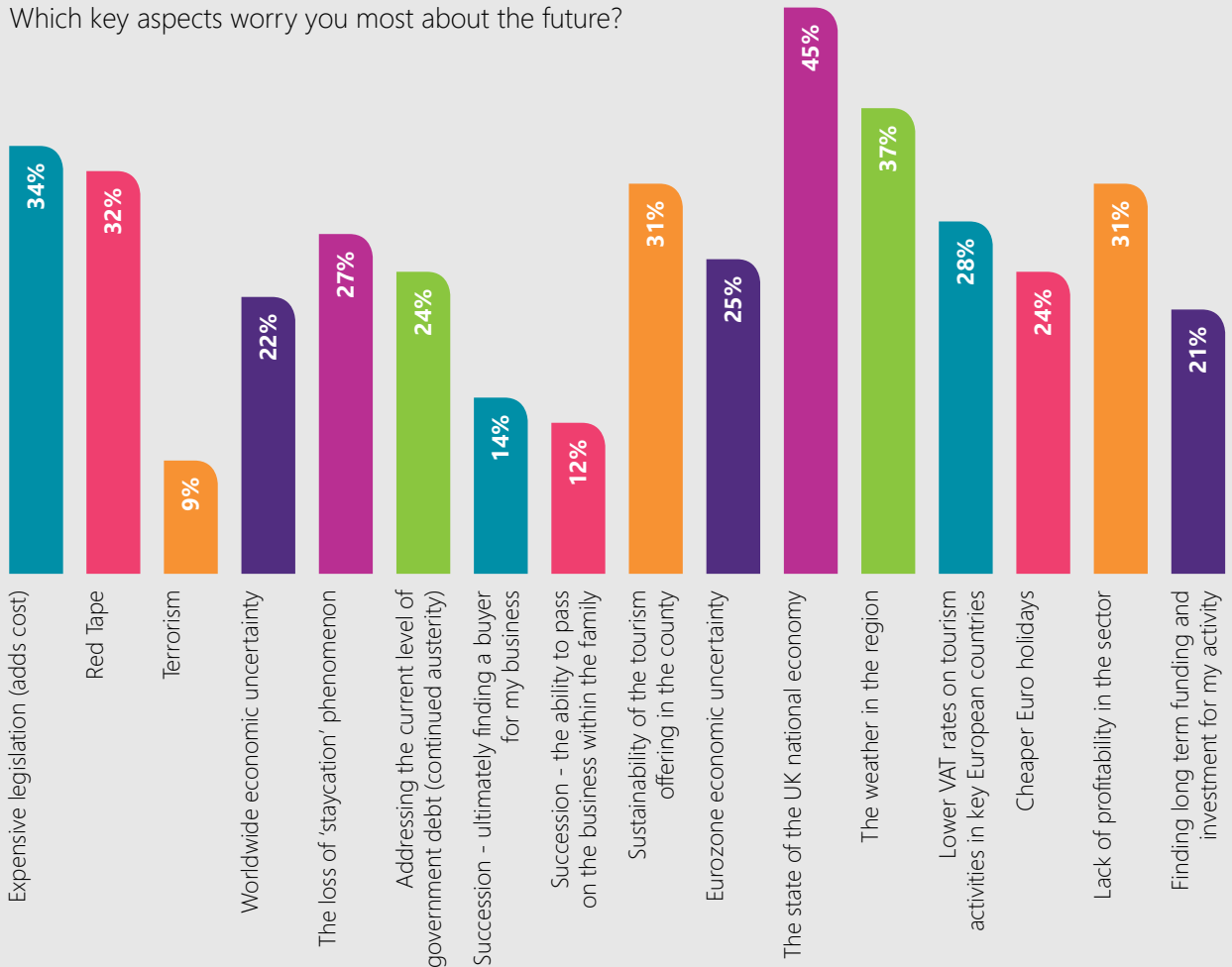
"The Government's 2015 pledge to introduce a minimum wage of £9 an hour for over 25s by 2020 has been useful because it means businesses can prepare and forward plan. The NMLW is a change we have to manage and deal with. There is little point whinging about it. Yes, it has hit our sector disproportionately compared to others, but it's a catalyst for innovation and if the concept of a 'living wage' allows more stability in terms of staff churn, then that has to be a bonus too."

How do/did/will the following aspects affect your business?

● Negative ● Positive



Which key aspects worry you most about the future?



# Overhaul for data protection

This year sees the implementation of the long-awaited General Data Protection Regulation (GDPR), regulation changes that will undoubtedly have ramifications for the tourism and leisure sector, according to James Howarth (pictured), lead partner of the Howes Percival GDPR team.



"Much of GDPR is broadly similar to the existing data protection regime and organisations that are already complying with the current data protection laws will have good foundations on which to bring their practices in line.

"However, there are some important new changes, particularly around the level of fines for non-compliance, accountability, and consent. With the ceiling for financial penalties being raised in the UK from £500,000 to 4% of global turnover," he said.

So what does this mean for the sector? Many businesses operating in this sector rely heavily on processing the data of customers and prospective customers and will need to look at what they are processing and the grounds for doing so.

Some operators are choosing to avoid the issue altogether by deleting their customer databases. Wetherspoons is a famous example. It seems their decision to erase came about following some high profile enforcement decisions from the Information Commissioner's Office (ICO) against household names (including Honda and Flybe) for contacting consumers in circumstances where there was insufficient evidence that consent had been granted.

"For those businesses that do not want to adopt such a drastic approach to their marketing lists, some preparation

in advance of GDPR would be prudent. In particular, where communications are directed towards individual consumers. It is important to check the basis upon which you are storing contact details and whether you have suitable consent for marketing communications," said James.

As well as taking care not to breach the direct marketing rules, for businesses to avoid fines, consideration needs to be given to security of both hard copy and digital data.

It is also worth considering ways in which potential data breaches can be avoided. It is also recommended that everything that can be is encrypted and that businesses put in place strict staff rules around personal data.

## KEEPING YOUR DATA SAFE

It's hard to avoid hearing about cyber attacks in the news.

Nick Barrett (pictured), of Hugh J Boswell Insurance, said: "The leisure and hospitality sector now sits in the top three of industries most frequently targeted by cyber crime.



"Research indicates half of the attacks involve theft of card holder data and personally identifiable information; such data as those held by hotels which include contact details, travel plans, birth dates, passport data and personal preferences. These can be used in many ways, ranging from fraud to extortion."

In May 2016, a Government survey confirmed that nearly 7 out of 10 attacks on businesses involved viruses, spyware or malware, and despite experiencing a

breach at least once a month, only half had taken any recommended actions to identify and address vulnerabilities. Only a third had formal written cyber security policies, and even fewer an inbuilt management plan in place.

The leisure and hospitality industry as a whole is very vulnerable to cyber attacks due to the sheer volume of credit cards used.

Other areas of potential weakness include unsecured public Wi-Fi access, loss or theft of laptops, poor education around IT security and ineffective vetting of third party suppliers who may have access to your systems.

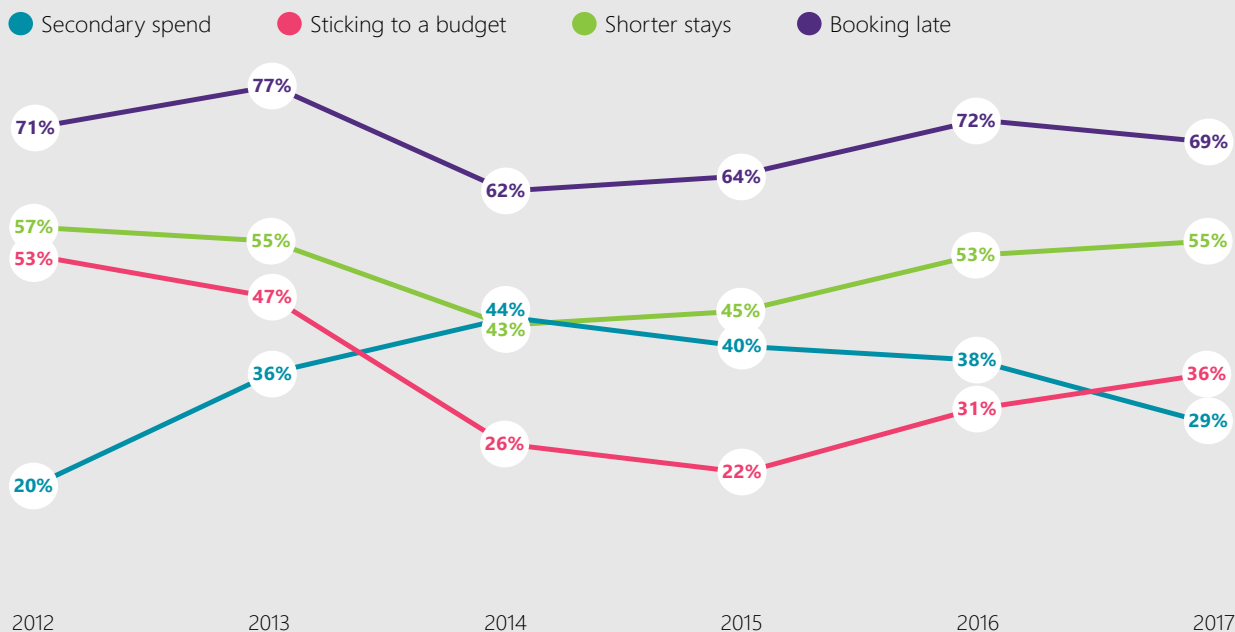
Protecting against attacks is no longer seen as a purely technical matter, it's as much a people and process problem as a technical one.

However, few small businesses have the resources to employ a full time cyber security expert to develop and implement policies, understand risks and plan defences and response plans. As a result of the issues, there are specialists willing to analyse your business risk and can help bring peace of mind by collecting information from your organisation and either verifying that your systems are secure, or providing the information needed to improve your security.

The benefit is that once you have implemented their recommendations you can be awarded a cyber security accreditation to display on your website, which also gives your customers peace of mind when engaging or booking with you.

"With the risk of loss to a business, insurance protection incorporating vital expert advice, support in these kind of situations and helping to get your business back on track is important," said Nick.

Trends: Where businesses saw an increase in customer(s)...





Wellbeing and mental health are high on the agenda and tourism groups can make the most of their surroundings when it comes to feeling good and doing good.

# Making the most of surroundings

Wellbeing and mental health are high on the agenda more and more when it comes to daily life and one Norfolk leisure company is making the most of its surroundings to boost this.

The benefits of exercise and being out in the open air have long been hailed as a major boost to mental health and general wellbeing. And Norfolk Outdoor Adventures is based in the perfect place to take advantage of what nature has to offer with its specialised guided tours, experiences and instruction in kayaking and stand-up paddle (SUP).

Situated on the Norfolk Broads, the tours enable people to not only to experience the beauty of the area but also do it in a unique way.

The tours are the brainchild of Martin Rendle, who said: "In this modern, technological age that we live in it is very easy for us to become entrenched in the day to day stresses of life living in a modern and fast-moving and ever-changing

environment. With this speed and haste, we can sometimes find ourselves feeling disconnected with our natural surroundings or even forgetting the sense of freedom that we once felt when we were young."

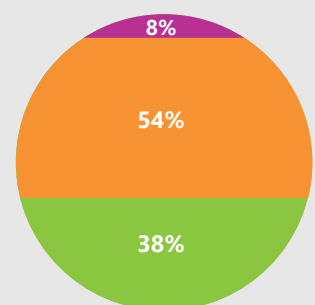
The tours could be used by businesses to give employees a taste of the outdoors.

He added: "We believe that by showing people both young and old, by means of guided safaris and experiences out on the water, they can not only experience the joys of our very special environment in a safe and secure way, but to also just teeter outside of their comfort-zones, thus enhancing their outlook to their own ability and skillsets, and open their eyes to the wonders of the outdoors."

He said that being outside, immersed in nature, while carrying out an activity such as kayaking or stand-up paddling, helps people forget that they are actually taking exercise.

"It's a glimpse into a healthy lifestyle, but also helps to reconnect them with nature almost by stealth," he said.

Does your organisation offer or plan to support employee wellbeing?



- Yes, in place
- We plan to in 2018
- No



# Day out with a difference

The efforts of groups like I Roll Up My Sleeves (IRUMS), coupled with fundraising by the Friends of Thurne Mill, are vital to help preserve landmarks such as Thurne Mill in Norfolk.

Ipswich-based social enterprise IRUMS was co-founded in 2016 by Amy and Glenn Hoddy and is all about “ethical business networking”. Rather than arriving at a hotel suited and booted and swapping business cards with rushed conversations over breakfast, business people sign up to spend time networking while working on a community project together.

This month IRUMS was braced to cross the border into Norfolk for the first time to help paint Thurne Mill, one of the Broads’ most iconic features.

You start by meeting a group of strangers, many of whom by the end of a busy day have turned into friends. In the intervening hours you’ve gloried in the views, worked in the open air to help restore a part of East Anglia’s heritage, enjoyed coffee breaks and lunch together, learned a bit of local history and been for a short boat trip.

And when you turn up for work the next morning there’s a new bounce in your step.

That’s the afterglow experienced by those who sign up, according to Glenn.

Thurne Mill is believed to be the most photographed mill in the county with around 150,000 pictures on Google Images alone.

“Feedback tells us that the main thing people get from IRUMS’ events is a sense of achievement because they’ve completed something worthwhile,” said Glenn. “It also links with Corporate Social Responsibility for businesses – they can do this rather than just donating money to charity.

“Everyone is on an equal level – sales reps and MDs are all in jeans, boots and goggles and everyone is treated with the same respect. It breaks down barriers, builds confidence and friendships are formed.



**The two-day Thurne Mill project, planned for mid-April, will see representatives from more than two dozen businesses painting the structure, which dates from 1820. This forms part of the vital fundraising efforts required to prevent the mill from decline. Visitors are not charged an entry fee on open days and a new Just Giving crowdfunding campaign has been launched to raise the £6,000 needed for its annual maintenance, some of which is put towards the £10,000 cost of repainting every seven years. It was last painted in 2014 and should not have needed a fresh coat until 2021 but unfortunately the date had to be brought forward as the masonry was attacked by red algae, turning the mill “a nasty shade of pink” according to mill owner Debra Nicholson.**

“People go back into the office the next day with what I call the ‘Smile Factor’. They smile at someone who then smiles at someone else, and so it goes on. If I could bottle that sense of wellbeing I’d have 50 businesses signing up for every event!”

## DEBRA’S STORY

Debra Nicholson first fell in love with Thurne Mill as a child on family boating holidays from her home in London.

When, about 20 years ago, she moved to Hemsby with her own family, Debra embarked on a photography A-level and decided to make the mill her focus.

She contacted its owner, Bob Morse, who had saved the mill from dereliction in 1949 and he generously shared his archives and knowledge to help Debra.

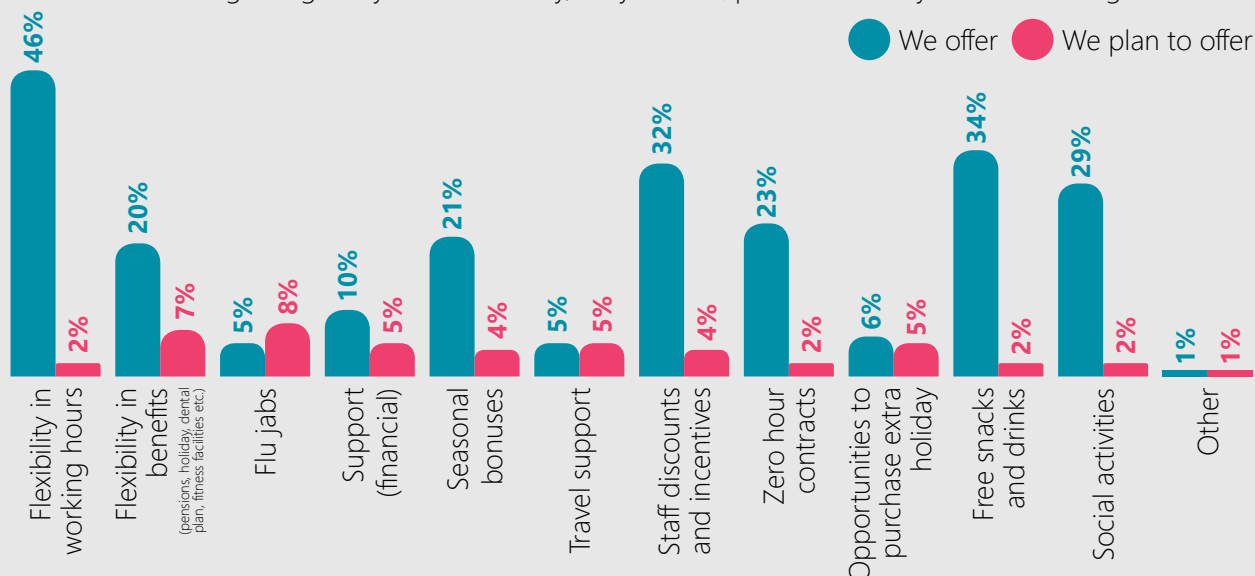
She sailed through her exam and phoned Bob afterwards to thank him for his help: “I can hear him now,” she remembered. “He cleared his throat and said: ‘I haven’t spoken to anyone for a week’. There and then I made a decision to phone him at 5.45pm every day to check up on him.”

True to her word, Debra did just that, calling Bob from around the world, including Australia, on occasions. Bob became part of the family and Debra and her son would help with grass cutting at the mill.

As time passed, Bob asked Debra if she and her husband would like to take over his collection of wind pumps after his death. With his agreement, they began caring for the collection in 2003 from their base in Repps with Bastwick so that they could learn all about them.

When Bob died in 2007, Debra discovered that he had left her Thurne Mill in his will. She said: “I still have to pinch myself. It was a marvellous thing, but also a huge, huge responsibility.”

With staff wellbeing being a key focus currently, do you offer/plan to offer any of the following?



# Keeping up to date with history

Our growing hunger for history is good news for the tourism economies of heritage-rich counties like Norfolk, Suffolk and Essex.

The Norfolk Museums Service announced its best-ever year at the end of March.

Visitor numbers at the 10 local authority-run museums have been growing steadily for the past five years and the 2017-2018 season saw them rise above the 400,000 visits mark.

"Heritage is really important to Norfolk on a number of levels," said Steve Miller, Norfolk County Council's assistant director of culture and heritage.

"For example, Norwich is one of the most complete medieval cities in Europe, King's Lynn has been a trading centre for centuries, Great Yarmouth has a long history as a seaport and one of the UK's great historic seaside destinations, and Norfolk's Deep History Coast has a rich abundance of internationally-important fossil finds.

While it is difficult to estimate what proportion of the total value is derived directly from "heritage tourism," Steve said: "We can be certain that heritage remains a

key driver of visits to Norfolk.

"There is a clear and growing interest and momentum in the heritage offering here, complemented by sandy beaches, walking and cycling, and obviously we are building on that interest."

A prime example, according to Steve, is the county's £13.5 million investment in the Norwich Castle: Gateway to Medieval England project – a development supported by the Heritage Lottery Fund (HLF).

Norwich Castle, standing on top of the biggest man-made mound in the country, is an undoubted jewel in the county's heritage crown.

Built as a Norman royal palace 900 years ago, it has also served as a jail and, in its current incarnation, a museum.

The castle's stone Keep is widely recognised as the museum's best "exhibit" prompting the county and city councils to invest in the four-year project which will see the original floor levels restored in the Keep



and rooms recreated, opening it up from basement to battlements.

The business case submitted to the HLF estimated the economic impact on the county's visitor economy to be £38 million in the five years following completion of the development.

Castle visitor numbers, currently around 210,000 per annum, are anticipated to increase by between 33% and 43%, to around 280,000-300,000.

Those visitors will be treated to new



**Bury St Edmunds is harnessing its First World War heritage for a hat-trick of worthy ends.**

**Not only will the Suffolk town's WW1 Trail honour those who fought and died, it will also give a boost to the town's economy, and its hospital facilities.**

**In 2018 a free trail will run from the start of the school summer holidays in July, until Armistice Day, in November, which will mark the centenary of the end of the Great War.**

**Local artists have created 18 works to go on display in public places throughout the town, reflecting their individual interpretation of the war.**

**Artworks include a Zeppelin – remembering the craft which bombed the town in 1915 – a**





displays and activities immersing them in the sights and sounds of Norwich Castle during its heyday as a royal palace.

The Norman Great Hall will be transformed to show the lavishly-decorated room that King Henry I would have seen when he visited the castle in 1121.

The expectation is that the scale and ambition of the project will lift Norwich Castle into the very top tier of national heritage attractions.



trench, a tank, a large Victoria Cross commemorating the one in Bury's Suffolk Regiment Museum and a number of animals used in war.

"The aim is to attract people to Bury St Edmunds to follow the trail and find all 18 pieces, using a trail map. There will be a website and prizes too," said Mark Cordell, chief executive of business improvement organisation Our Bury St Edmunds.

Three years ago a Wolf Trail of art in Bury was a huge hit. Mark estimates that it was enjoyed by more than 15,000 people.

"I would say heritage is probably the main attraction of Bury St Edmunds for visitors and this latest trail reflects

that," he said. "People come to the town to see places like the cathedral and to learn about our history."

Artworks will be in heritage sites such as the Abbey gardens and cathedral, but also in the quieter streets where it is hoped visitors will pause to explore Bury's independent shops and take time to eat and drink.

Mark added: "The feedback from the Wolf Trail was very positive and we're confident the WW1 trail will also be a success."

When the trail ends, the pieces will be auctioned towards a £500,000 appeal to build a new cardiac centre at the West Suffolk Hospital.



## AMERICAN CONNECTION

Millions of Americans are expected to visit Britain in 2020 for a very special commemoration – and Harwich is hoping to be on their itinerary.

The year will mark the 400th anniversary of the Mayflower's world-changing voyage from Plymouth, England, to Plymouth, Massachusetts, carrying some of the most influential early settlers to the New World.

Essex is one of 11 destinations in England with strong Mayflower connections. The Mayflower was registered in Harwich, its home port. Harwich was also the birthplace of its master, Captain Christopher Jones. It is also thought that John Alden, a crew member, came from Harwich.

The influx of USA tourists to the UK is expected to be massive – American descendants of Mayflower settlers number around 30 million and research by USA heritage organisations has revealed that 12.5 million to 13 million people are planning to come to the UK in 2020, according to Tony Elliston, chair of the Harwich Mayflower Heritage Centre. No wonder then that Tony has been penning a piece about Harwich and its Mayflower connections for a genealogy magazine in Boston, Massachusetts, which has some 250,000 subscribers.

The 11 destinations are sharing a £400,000 VisitEngland grant to help prepare for the anniversary. And an additional £500,000 of Discover England funding has been awarded to destinations, including Essex, to promote wider American connections.

Visit Essex was successful last November, at the World Travel Market in London, in attracting US journalists and tour operators to Harwich. And Harwich International Port representatives were in America last month attending the world's biggest cruise convention where they hoped to drum up trade for the Mayflower anniversary.

Harwich is busy preparing with plans including an on-shore replica of the Mayflower in which visitors can stay and experience, through virtual reality techniques, life at sea.

Tony is also hopeful that publicity will attract British tourists. He said: "We have the history, we have the stories. We hope people will come."





# Evolution plays a big part in success

Some businesses are carefully planned, others evolve. Banham Zoo most definitely fits into the second category.

It all happened more by accident than by well-thought out judgement. But 50 years on from its original conception, Banham Zoo is still going strong and still evolving.

Until five years ago when he handed the running of Banham and its sister park Africa Alive! over to a new charity, the owner was Martin Goymour, whose family still has Roarr!Dinosaur Adventure under its wing.

Martin was instrumental in the formation of the animal conservation and education charity ZSEA (Zoological Society of East Anglia), whose trustees he has entrusted with the future of the two parks so that he can be "released back into the wild", as he puts it, at the end of 2018.

Back to the start, however, when Martin's grandfather and father operated an extensive bakery business over the border in Bury St Edmunds, Suffolk.

"My father retired in 1952 and bought Grove Farm (the farmhouse now houses the offices for the business). He wasn't a

farmer but now had 250 acres including 30 acres of orchards and soft fruit as well as livestock," said Martin. The fruit was picked and packed by local workers and taken off to sell at Covent Garden until his father realised it was more profitable to sell direct to the public from outside the farmhouse.

From basic farming, the business soon diversified.

People were encouraged to come out to the countryside to see the cattle being milked and the chickens running around, with the WI running teas on the lawn and the farm giving tractor and trailer rides.

"This was the 1950s and 1960s when lots of pet shops sold exotic animals," said Martin. "There was no quarantine or conservation concern and a lot of these exotic animals couldn't be domesticated."

Many knew of the growing menagerie at the farm and started bringing their unwanted pets to the Goymours. They included parrots, timber wolves, dingos, a porcupine and two bear cubs, which had



been used in a commercial shoot for tights.

This diversification wasn't without its issues, however. "In 1968 the farm manager complained that looking after all these animals was not in his job description so we had to employ an animal keeper and began to charge visitors to cover the costs," said Martin. It was 2/6 (two shillings and sixpence) for adults and a shilling for children (12.5p and 5p in today's money).

Martin worked with his father, joining the



## ENDURING ATTRACTION

In the days of high-octane hobbies and hi-tech gadgetry, a North-Norfolk attraction is flying the flag for traditional family entertainment, and recognises the importance of continually improving and diversifying the product on offer to keep the visitors coming back...

The Thursford Collection has evolved beyond recognition from its early days as a steam museum, built up from what was once a hobby of collecting old engines.

George Cushing had worked as a steamroller driver until combustion engines took over but he couldn't let go of the past. He saved the steamroller he worked on and bought up other engines to keep them from being scrapped. They cost him £20-£50 each. Today the beautifully restored and cared-for exhibits are worth thousands.

In 1976 George made the museum into a charity and in 1977 he handed its running to his son John, who remains CEO to this day. Looking at opportunities to use the building and create an additional revenue stream, the idea of the Thursford Spectacular was born.

At the first Christmas show, there were 500 in the audience, now the show regularly sells

out and entertains 160,000 people over its run, with tickets on sale for the following year before the previous year's show has finished its run. "In the early days of the show it would attract about 20% of the business, now it's the other way round with the show bringing in 80% of visitors and the museum 20%," said John.

Despite the show being a massive success, requiring year on year investment, John and his team have continued to expand what Thursford has to offer, creating additional revenue streams. When the need for a restaurant became apparent, they initially hired in a marquee every year to provide somewhere for the many bus tours from around the country to go if they arrived early. As this trial proved successful, investment



was made into a permanent marquee with kitchen and toilets. This then led to a diversification opportunity of using the building throughout the year and The Thursford Collection is now also a wedding venue.

The Thursford Spectacular has enduring appeal and that is borne out in the huge audiences which come back for more year after year. John is still very much behind the festive show's success and works hard each year to put together a programme which will appeal to all ages, and which will still be loved by the die-hard traditionalists. His office is stacked high with CDs as he picks out the 70 or 80 pieces of music, whittled down

from hundreds to get down to the final choices ready for rehearsals at the start of the summer.

Thursford's ongoing success has huge knock-on benefits for what is seen as out of season, for the surrounding area. John estimates Thursford is worth about £10 million to the local economy, as the cast of 130 stay in 84 cottages nearby for the run of the show. In addition, those in the audience who come for the night or weekend take another 1,500 beds. "Only about 20% of our audience come from Norfolk," said John. "Others come from all over the country, particularly 13,000 from Yorkshire, 4,000 from Northumbria and thousands from Kent and Wales."

family business proper when he was 15.

"Whilst engaged with other parts of the family enterprises, the animals were like a magnet to me and every hour I could grab was spent building Banham Zoo up right from the beginning," he said.

When the zoo first opened it was commonplace to buy animals, which later led to zoos exchanging animals as part of specific breeding programmes.

And over its 50 years, Banham Zoo has joined zoos all over the world moving towards working together to actively conserve wildlife.

"Zoos over the last five decades have changed dramatically. Now all zoos throughout the world work and co-operate together," said Martin. "We have always had animal welfare at heart but this is much more closely structured now with breeding studbooks, and studbook keepers in place to make sure that some of the most endangered species have a secure long-term future, whilst we continue to be a resource for study and learning."

That means that any breeding is carefully controlled to promote genetic diversity. It's all part of the ZSEA's simply

stated statement: "Our concern is wildlife conservation".

Success stories have been the Arabian Oryx which was hunted to extinction in the wild but was successfully reintroduced into its native habitat in Jordan from zoo reserves. Then there are endangered breeds of zebra, tigers, snow leopards and rhinos which now have a greater chance of survival with the assistance of zoos.

The charity is well-placed to continue its good work, particularly with the addition of a newly appointed CEO – Prof David Field, previously the zoological director at London Zoo and Whipsnade.

"He had been there 15 years before coming to us and really understands the ethos of ZSEA," said Martin. "It's all about education and conservation." And he added: "Right from the start we have always believed that zoos are a positive force for nature with the conservation we can achieve, not only through breeding but through education."

He said TV programmes such as Blue Planet were able to highlight the problems for animals but seeing it with your own eyes and engaging all the senses is essential to

create empathy with the species. "It's once you engage with animals close up that your brain achieves empathy. That can't be recorded in 2D."

It's certainly an attraction for the 350,000 or so visitors who come to Banham Zoo and Africa Alive! every year. "We are totally reliant on visitors to support ZSEA's work. We like people, we like to talk to people and we like to involve people in what we do," said Martin. There are talks throughout the zoo during opening hours, mostly around feeding times with information about conservation to engage with visitors. The zoo has spectacular free-flying bird of prey displays, as well as an indoor presentation of 'amazing animals', a walk-through sub-tropical house, lemur encounters and penguin cove which particularly allows visitors a unique closeness with animals.

"The animals are ambassadors," said Martin, adding: "Our biggest challenge now is to show that zoos appeal to everyone, and not just those with children. We have 50 acres of beautifully-landscaped parks and plenty to enjoy for all ages, with the ultimate benefit being earned by the animals in our care and conservation."

# Fight tide of litter

We have beautiful beaches in Norfolk, Suffolk and Essex but increasingly they have been used as a huge dustbin.

Last year, a study produced by the Ellen MacArthur Foundation produced some disturbing conclusions – the equivalent of one entire truck of plastic (eight tonnes) is dumped in the sea every minute and, if we don't change things, by 2050 we could have more plastic than fish (by weight) in the sea.

The report has been published by the Marine Conservation Society (MCS), the UK's leading charity for the protection of our seas, shores and wildlife.

For more than 30 years MCS has been the voice for the sea and the creatures that live beneath the waves, for our breath-taking coastal environment, for all those who make a sustainable living from the sea and for everyone who simply enjoys visiting the beach and coastline.

Its survey (the Great British Beach Clean) reported a 10% increase in beach litter. And the message is: Enough is enough. The call has gone out to stop drinks cups, plastic cutlery, straws, plastic bottles, lids and stirrers polluting the sea.

They say: "Our oceans are sick. Not a day goes by without new scientific evidence making the headlines regarding the plastic



plague that is enveloping our seas, like a virus with no cure. Our understanding increases, and so does the horror.

"At first it was stranded starved animals with stomachs full of plastic telling us how lethal this light, sturdy and practical material we use everyday is, once out at sea.

"Then, with research progressing, the plot thickened and got gloomier. Plastics in the ocean are not just mistaken for food and ingested, they actually represent a toxic nightmare that's messing with Mother Nature."

That's scary news and the knock-on effect

## Doing their bit...

Tourism businesses across the region helping the environment include:

**Cromer Pier** in Norfolk has banned plastic straws and is offering re-usable takeaway drink cups to reduce waste.

**Africa Alive** and **Banham Zoo** have a ban on single use plastic bottles, plastic straws and other single use plastic items.

Bar and restaurant owners in Norwich from **The Plasterers, North** and **Frank's Bar** and **Gonzo's Tearoom** are working together to introduce biodegradable straws, encouraging other bars and restaurants to take part in their Last Straw campaign.

**Sandringham** has for some time been moving towards phasing out single-use plastics and using compostable, biodegradable or recyclable packaging in the restaurants and shops at the Visitor Centre. Plastic bottles and straws will gradually be phased out at all public cafés and restaurants.

**Beach Bites** café and caterers in Felixstowe have banned plastic straws and plastic sandwich boxes and are working to reduce other non-recyclables, intending to become plastic-free.

for tourism is equally concerning. Who wants to come to a beach covered with plastic and other debris?

Locally, communities are doing their bit to halt the tide of the plastic plague. There's a regular beach clean in nearby Sheringham and up and down the coast two-minute beach clean boards are popping up to encourage locals and tourists to do their bit.

There have been campaigns on social media encouraging every person to pick up three bits of rubbish every time they are on the beach and generally awareness of the issue is being raised.



**Mundesley beach in Norfolk has its own #2minutebeachclean thanks to the efforts of a local businesswoman and support from North Norfolk District Council.**

The movement, which was started in 2014, has already seen a well-used litter pick noticeboard operating along the coast at West Runton, launched by West Runton Beach Café owner Louise O'Shea. The Mundesley board is a joint effort between businesswoman and board sponsor Kathryn Moore, Mundesley Coastwatch, who will put the board out when their volunteers are working, and NNDC, which supplied 10 litter pickers.





# Tourism goes wild

As well as caring for the future of many species, breeding programmes can encourage visitors. Two of the most popular are the colonies of seals along the North Norfolk coast and the red squirrels at Pensthorpe.



"Who doesn't love a red squirrel?" asks Chrissie Kelley, head of species management at Pensthorpe Conservation Trust. The fact that these cute little rodents are one of the most popular draws at north Norfolk's Pensthorpe Natural Park is a win-win situation for conservation and tourism.

Up until the early 1980s reds could still be seen in Norfolk at places including Thetford Forest and Sheringham Park, but today there are no wild red squirrels left in East Anglia.

Since 1994 Pensthorpe, a member of the East Anglian Red Squirrel Group, has been playing its part in a national captive breeding and release programme aimed at increasing red squirrel numbers and

reintroducing them into the wild.

At Pensthorpe well over 100 red squirrels have been successfully bred with many being released into the wild, in Anglesey, north Wales. Chrissie and her team care for the Pensthorpe squirrels in three enclosures, built around existing trees and linked by overhead runs.

These create the ideal conditions for the squirrels to thrive and breed, and also for the public to view them and enjoy their antics. Every now and then a Pensthorpe red squirrel story makes the news, boosting visitor numbers. In 2014 the media loved the story of Supermum Squirrel Tortoiseshell, who managed to produce an astonishing 50 kittens during her nine-year

life. Crowds flocked to Pensthorpe to see Tortoiseshell and her family.

"If we didn't get people coming down the drive we would really struggle to carry on with this vital work," said Chrissie.

At weekends and throughout the summer Pensthorpe stages red squirrel talks around the enclosure.

"It's really important to educate people about why we have a breeding programme," said Chrissie.

"Most people growing up today have never seen a red squirrel in the wild and don't realise that the grey squirrel is not native. It's the perfect situation for us – spreading the word while people are having a great day out."

## WHAT'S NOT TO LOVE?

What tourism business wouldn't welcome 80,000-plus visitors flocking to their area out-of-season?

Those are the numbers recorded by Natural England at Horsey, on the Norfolk coast, between late October and late January. Winter crowds flock to remote Horsey, 13 miles north of Great Yarmouth, to view seal pups at close quarters.

A record 1,820 grey seals were born at Horsey over the last pupping season, a number which has grown by about 200 each year for the past 15 years, according to David Vyse, spokesman for the Friends of Horsey Seals (FOHS). Although adult seals are present throughout the year, the arrival of the pups is the big draw.

And the handful of



established businesses in the area are reaping the benefit. They include the village's Nelson Head pub and the Poppyland tea rooms, which have both had glowing reviews on TripAdvisor, many referencing visitors being drawn by the seals.

The opportunity for education, wildlife and tourism to run hand in hand is very important. That is the focus behind the success of Temple Seal Trips, run by Jim and Jane Temple, whose family

have been operating trips from Morston to Blakeney Point and beyond for over 70 years. Their boat trips are famous for visiting the seals and the significant variety of birds that live or migrate to the area throughout the year.

The popularity of the North Norfolk coast has seen tourist numbers grow, and the attraction of the area, as an all year round destination, has been reflected with the boats running at near capacity, for the 11 months of the year that

they operate.

Jane Temple outlined the importance of providing access to nature and educating the visitors on the seasons and how special the area and wildlife is. "It worries me that some visitors, unfamiliar to the needs of the birds and animals simply try to get too close, walking in areas they shouldn't.

"Wildlife is important and people need to understand about their habitats.

"We ensure our crews educate the passengers about what is going on. They get a great opportunity to see nature in the raw, but at a safe distance.

"There is a risk that too many visitors will disturb and spoil what makes it a great area to visit. Care needs to be taken not to ruin what we have."

# EDUCATION IS KEY

The Marine Conservation Society runs Cool Seas Investigators (CSI) projects to engage students aged 10-16 years in key marine conservation issues.

Each project involves young people analysing data, working collaboratively and generating solutions to a real-world issue, which has both local and global significance.

As well as linking with core curriculum areas, projects also focus on learning for sustainable development.

Following a successful pilot, our Cool Seas Investigators: The Unflushables resource is now available to schools for free download.

And it seems it's never too young to start teaching children about conservation.

Reception teacher Kim Chambers (right), from Chapel Break School in Norwich, says: "It is absolutely vital that children are taught to be aware of their surrounding environment.



"We aim to give children relevant and real experiences – to give them a burning need to know."

Kim said: "The classroom environments have been carefully designed to immerse them in an undersea world. We plan environments to not only look exciting and authentic but also engage all the senses – we can hear the sounds, smell the saltiness. This is all part of our approach to real learning projects aimed at creating experiences that enable children to make connections, ask questions and create new and meaningful memories."

She continued: "As part of the project we hold a launch event to introduce the BIG question, think more deeply about issues affecting ocean life and ask ourselves how can we make a difference. We showed the children some clips from Blue Planet and a short film about the floating plastic sea island in the Pacific so the children get to see the devastation that plastic waste can have on the wider world."

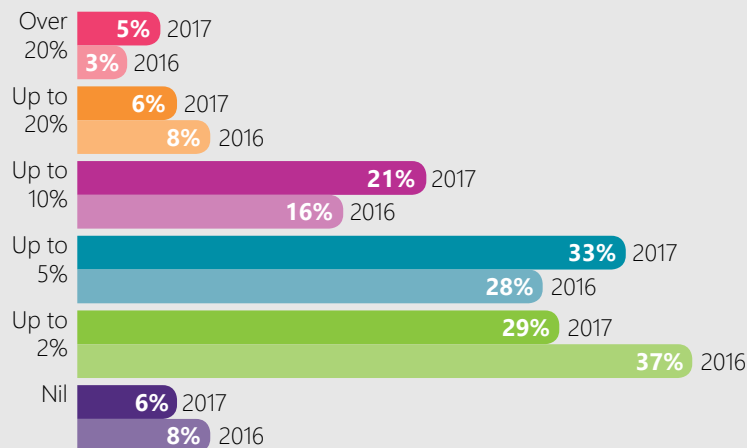
The children wanted to know how they could help change it. "They were fired up and ready to take action," said Kim.

"Do I believe that children should be taught about conservation and environmental issues? Absolutely, the children in my class are four and five years old. They are passionate and driven to make a difference."

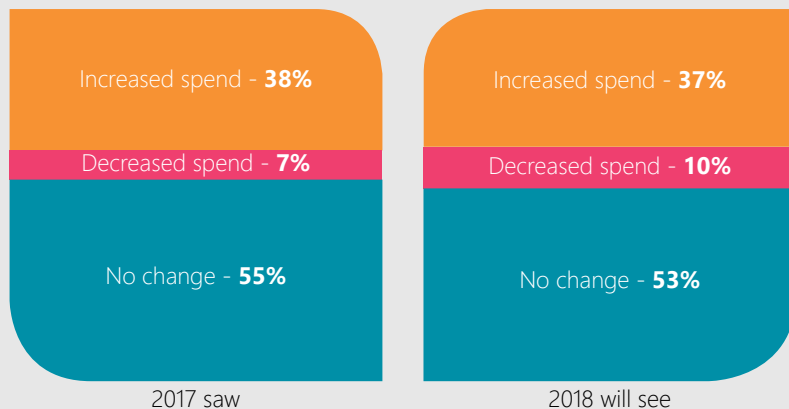
**CLASS ACT:** The reception room at Chapel Break as an undersea world.



What proportion of your turnover was spent on promotion and marketing in 2017?



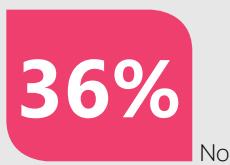
In 2017, how did your marketing/promotional spend compare to 2016? And how will your spend in 2018 compare to 2017?



Are you able to take bookings online?

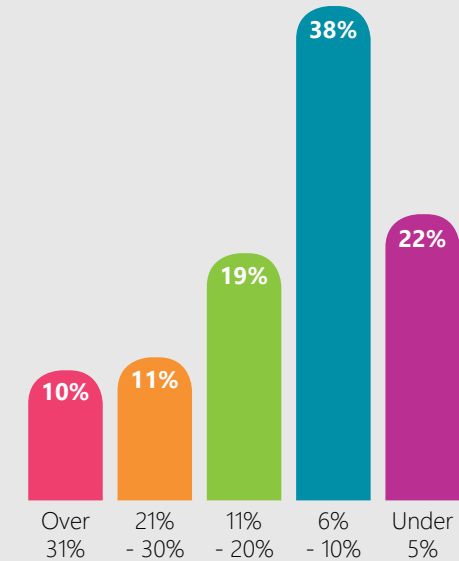


Yes, bookings can be made directly online

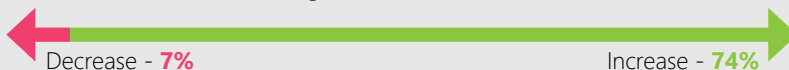


No  
Not directly, but bookings can be made online through our agent

In 2017, how much have web bookings increased?



In 2017 have web bookings increased/decreased?





# Always begin with the end in mind

Digital marketing is an important tool when it comes to tourism. But getting it right is by far the most important issue, according to Marcus Hemsley, from the Fountain Partnership. He is pictured right with partner Rebecca Lewis Smith.

The biggest mistake businesses make in digital marketing is focusing on activities rather than outcomes.

So says Marcus Hemsley, from the award-winning Fountain Partnership.

"We often hear from marketing teams who have lots of exciting activities to try, but who haven't done any forecasting and therefore have no idea what the results will be.

"The most successful digital marketing campaigns begin with the end in mind. Accurate forecasting is paramount. It reduces risk when launching new digital marketing campaigns, eliminates wasted media spend and troubleshoots unprofitable campaigns that have been allowed to run for some time."

He said there were three numbers to look for when it came to ensuring a successful digital marketing campaign - cost per acquisition (CPA), cost per click (CPC) and conversion rate required (CRR).

Marcus often quotes the Pareto principle, that 20% of your effort drives 80% of results. But he said: "What marketers often forget is that you can chunk this up. So, the top 20% of the top 20% (4%) will bring 64% of revenue.

"Ultimately, optimisation is about prioritisation. With more competition you need to optimise the journey for your most valuable customers. Once you know where your best customers are on the internet you can optimise the content within the funnel to maximise return on investment.

He said forecasting was the way to take out the risk with marketing and his agency was 94% accurate when it came to this, using models he has created through research and data analysis.

"You need to measure everything," he



said. "Find where the most profitable customers are coming from and track it back.

"Then you can increase the click through rate, conversion rate and sales. It's about being much more targeted."

So, from the point of view of a holiday cottage business, for example, it could mean attracting clicks through showing an image of the idyllic relaxing holiday.

Once on the website there could be an offer to entice a booking and then easy booking options online to convert that to a sale.

"GDPR will result in many leads generated through affiliate marketing, email lists and third party data becoming largely unusable so digital marketing will become more popular.

"What some businesses haven't yet realised is the knock-on effect for cost per click advertising."

To offset a fall in leads post GDPR, marketers will throw money into channels such as AdWords and paid social media to

make up the shortfall.

As competition for keywords and audiences increase, the cost-per-click (CPC) of paid advertising will go up significantly. This means you could be paying more for fewer leads from June, he said.

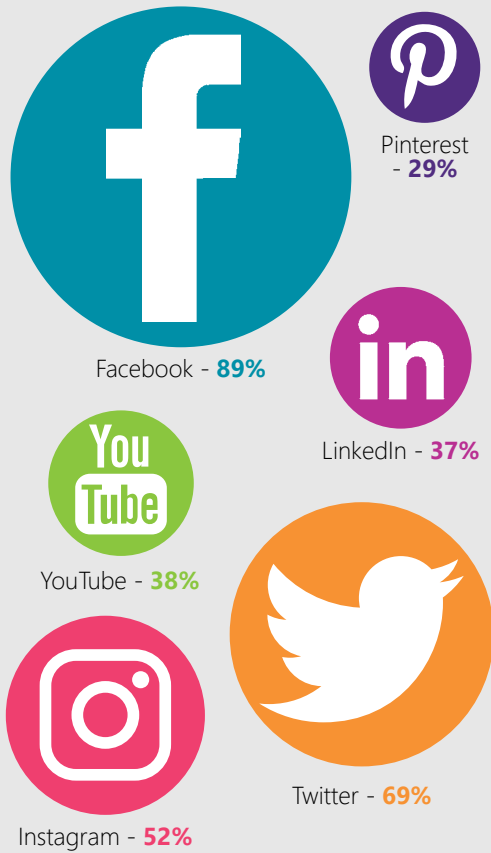
The Fountain Partnership works with many businesses in the tourism industry including Visit Norwich, Kett Country Cottages and Best of Suffolk as well as Abellio Greater Anglia trains.

The company is also a Google Premier Partner and in December 2016 won Google's award for best search performance in Europe, the Middle East and Africa.

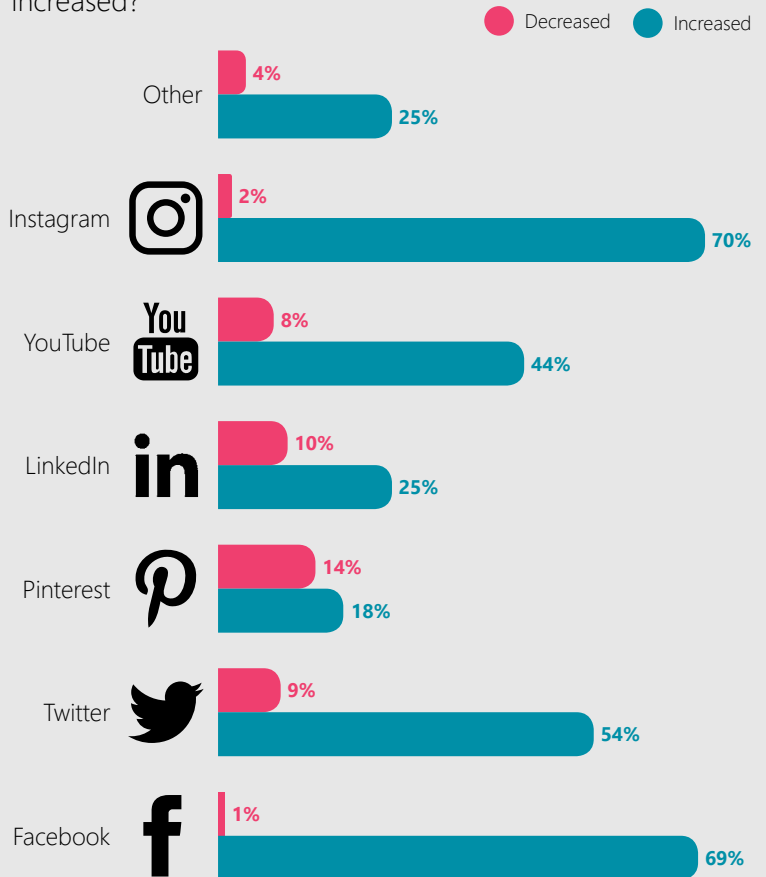
A year later it achieved that again, as well as Google's Global Award for Growing Business Online in recognition of its global digital marketing strategies.

"That's all from our local offices. Some of the other countries involved found it impossible to comprehend that we were outside London," said Marcus.

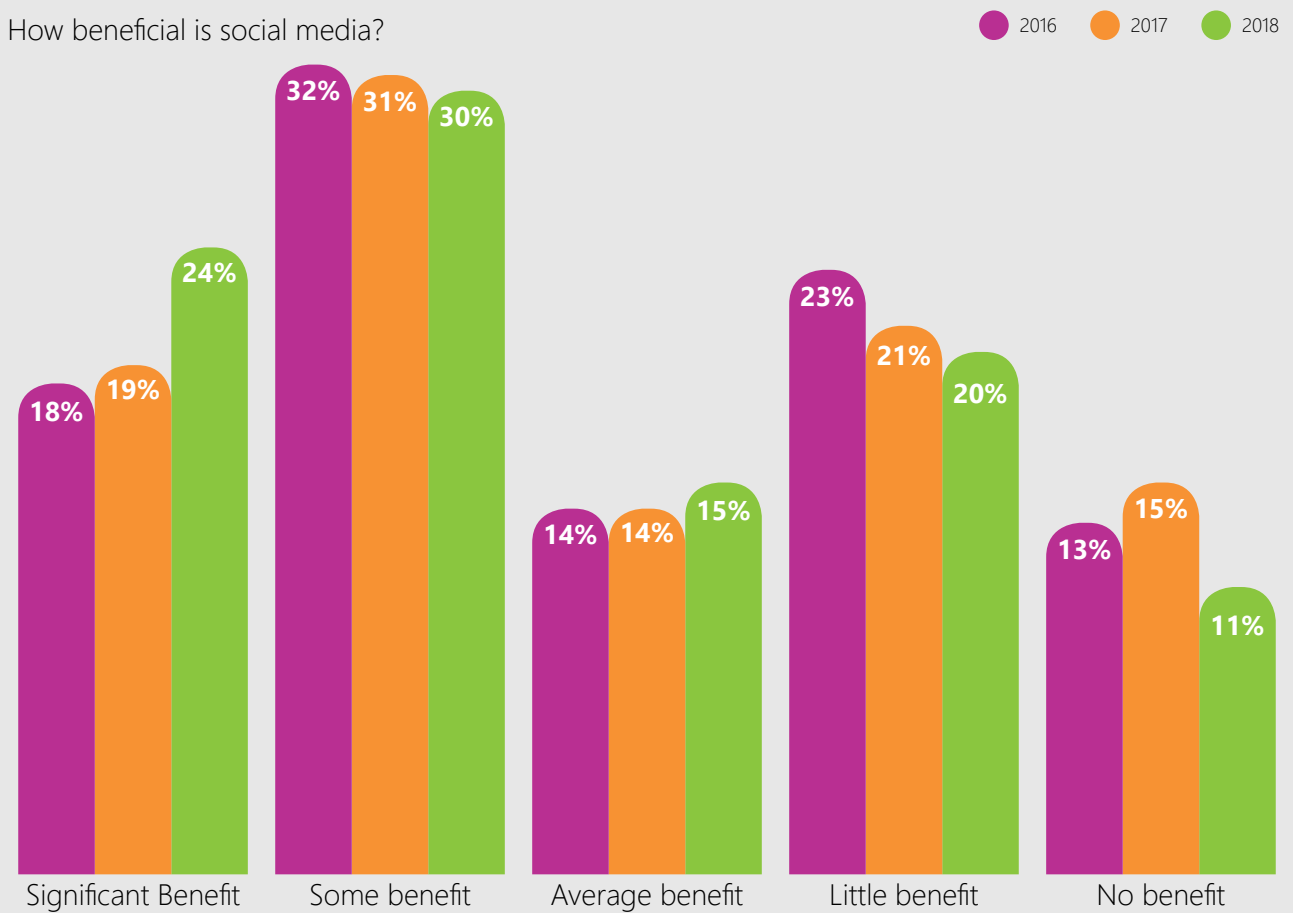
Which of the following social media do you use to promote your business?



In the last 12 months, has your social media decreased/increased?



How beneficial is social media?



# Don't let reviews trip you up

Making sure you get reviews, responding to them and increasing the amount of reviews is key to keeping your business ahead of the game on TripAdvisor.

That's the advice from consultant Sanj Naha (pictured), former global head of restaurants at TripAdvisor.

Sanj has been helping hotels, restaurants, pubs and tourist attractions learn how to leverage TripAdvisor. "Whether you're a fan or not, get it right and a great TripAdvisor performance brings in new guests and can raise your service level," he said.

## REVIEWS IMPACT BOOKINGS

A Phocuswright study prepared for TripAdvisor revealed the impact reviews have on travellers' decision-making:

- 83% of respondents indicated that reviews help them pick the right hotel.

- 80% read at least 6-12 reviews prior to booking a hotel.
- 53% won't commit to a booking until they read reviews about the hotel.
- 68% of respondents say reviews help them know about local attractions.
- 64% use reviews to find restaurants.

Sanj said: "These results demonstrate how reviews can impact sales for all hospitality businesses. If you're not collecting fresh feedback and sharing

it with travellers, you may be losing business."

In Sanj's view, embracing travel review sites can increase the value of your brand.

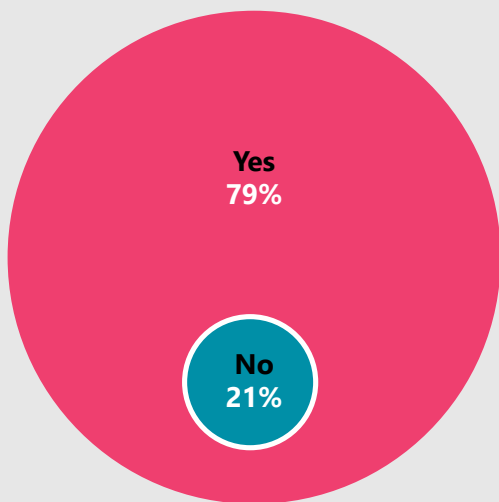
"A guest wants to experience adventure, romance and happiness. They don't want to experience a thriller where they don't know what's happening or when, and the last thing they want is a horror story," he said.



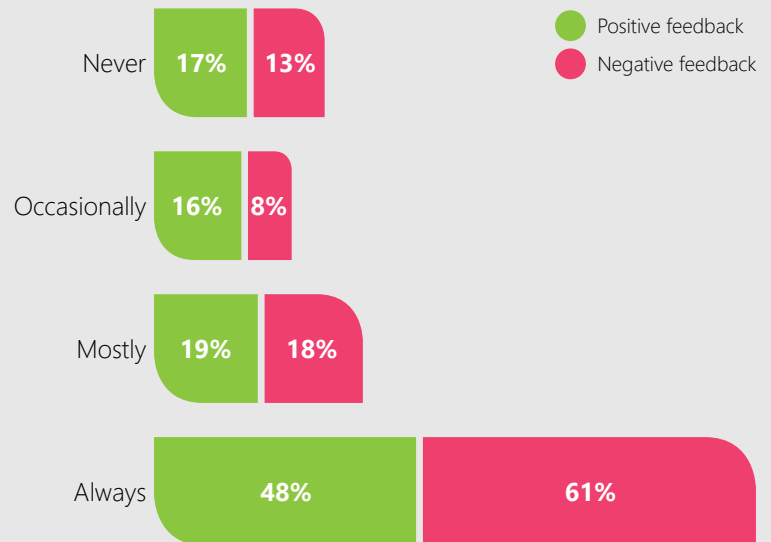
## Sanj's top tips

- 1 If a guest is having a rant, invite them to email you so you can carry on the conversation in private.
- 2 Remember your reply will be read by potential guests seeking reassurance that they will not have a negative experience if they visit you.
- 3 Influence your guests so they feel compelled to share their positive experiences.
- 4 Always reply to all your reviews.

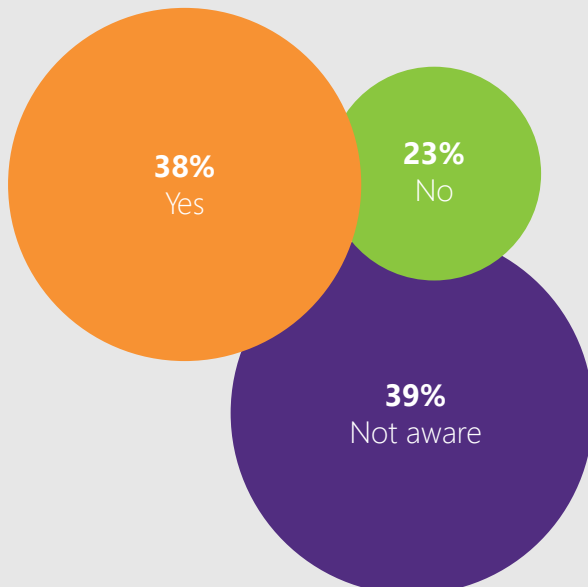
Do you monitor travel review websites like TripAdvisor?



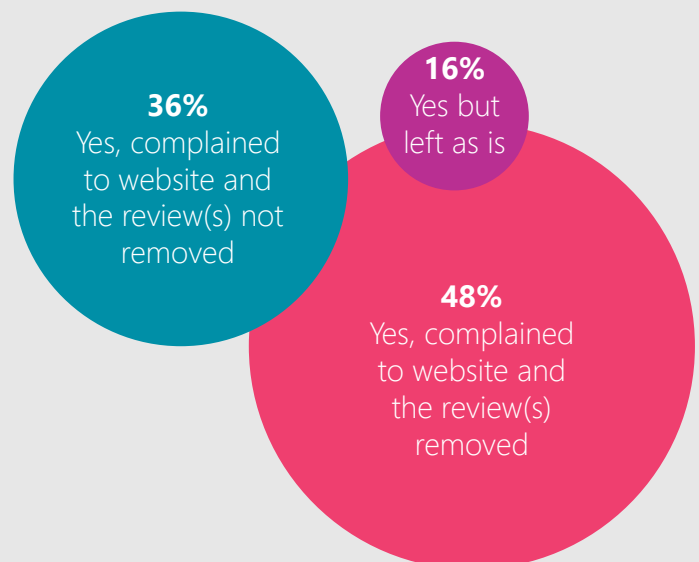
If so, do you respond to online reviews?



Have you ever been a victim of a fake review?



Of those who have been a victim of a fake review, what was the outcome?





# Investing in the past to secure the future

Future visitors to Sutton Hoo are set to come away with a much deeper understanding of our impressive Anglo-Saxon forebears and the legacy they left us.

The National Trust site, near Woodbridge in Suffolk, is due to close at the end of September and undergo a £4 million radical makeover, re-opening in 2019.

The cash will be used to make a trip to the internationally-significant site a more welcoming and inspirational learning experience to enjoy, remember, and want to repeat.

When the Trust opened Sutton Hoo in 2001 it attracted about 200,000 visitors annually.

They flocked to see a discovery which rewrote English history – the burial site, beside the River Deben, of an Anglo-Saxon king in a ship, with all his treasured possessions, the richest such artefacts to survive in northern Europe.

But in recent years visitor numbers have

levelled to around 95,000 pa with many visitors viewing Sutton Hoo as a “Been there, done that” trip to be ticked off a list and not repeated.

The Trust hopes its plans will fill people with awe and boost visitor numbers by 37,000 pa by offering a new interpretation of the site, centred on the landscape.

A £1.8 million Heritage Lottery Fund grant, match-funded by the Trust plus cash from other sources, will be used to gradually increase both visitors’ knowledge of the Anglo-Saxon world and their excitement about the final “Big Reveal” of the 17 mounds known collectively as the Royal Burial Ground.

The site’s amazing secrets were first uncovered in the months leading up to the outbreak of the Second World War when Sutton Hoo’s owner, Edith Pretty, commissioned local archaeologist Basil Brown to discover what lay under the mounds on her land.

Mike Hopwood, visitor experience project

manager for Sutton Hoo, said that when the site was first opened to the public by the Trust, the emphasis was, understandably, on the archaeological dig and its findings.

But people’s expectations and technology had changed and a lot more had also been discovered since then, he added.

For instance, recent analysis of the bitumen substance used in the boat revealed that it had come from Syria.

The transformed site will throw light on the so-called Dark Ages and help visitors recognise the Anglo-Saxons for the sophisticated people they were, trading around the world, boasting exquisite craftsmanship and bequeathing us laws, language and culture which are interwoven through modern life.

The “wow factor” will hit visitors as soon as they arrive with a life-size structure, based on the Sutton Hoo boat, taking centre stage in the courtyard.

Surveys have revealed that the trip to





## £600,000 SUNK INTO NEW HABITAT

As part of its ongoing improvements and with animal welfare at its heart, Banham Zoo has invested £600,000-plus in a new sea lion pool and environment.

The area has been designed under strict guidelines to provide a natural environment for the animals and opened before Easter.

The work has included the installation of

a substantial filtration system to keep the water clear and healthy.

The pool has deep areas of water, a covered area to keep the water sheltered in the summer and glass barriers to give visitors maximum chance to see the animals in action.

CEO Martin Goymour said: "We have had various seals and sea lions in the

past at the zoo since 1974 when a smaller area was built. Nowadays there are very exacting standards with the animals needing a salt water marine environment, which is why we have spent £100,000 on the filtration system alone."

The five sea lions came from zoos in Europe and are now settling into their new environment.



the Royal Burial Ground, with distracting farming activity, gates and fences, has been an underwhelming experience for many.

And so a new route has been planned for drumroll effect, leading into a valley and then up through woods towards the river.

It aims to create a sense of the Royal Burial Ground's spirit, drama and significance and to give visitors opportunities to think about the human effort, ingenuity and reasoning behind the astonishing feat of dragging the ship to its resting place and the sense of power and wealth its presence must have created for miles around.

A 17 metre tall viewing tower, discreetly tucked into surrounding woodland, will give uninterrupted views of the entire burial ground, helping people appreciate its layout and scale, with a sight-line to the river that connected our ancestors to the North Sea.

The use of Edith Pretty's home, Tranmer House, will change, as will that of the existing exhibition hall.

Numerous hands-on experiences will be introduced - for example, the chance to take part in geophysical and field surveys and to learn about Anglo-Saxon cooking, medicines, fire-lighting and weaving.

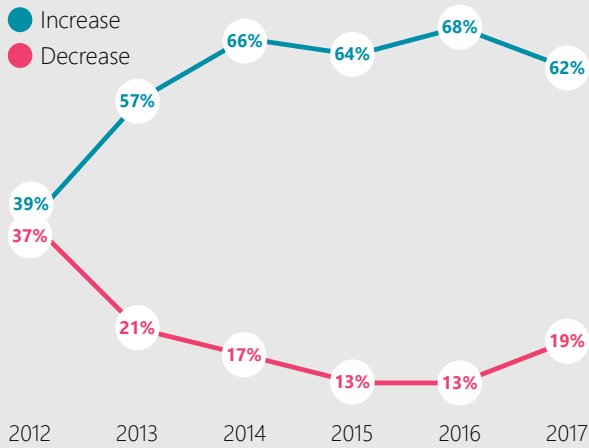
There will be visiting exhibitions and talks,

3D replicas of some of the artefacts to handle, more use of the Anglo-Saxon love for storytelling about people, atmospheric dawn and dusk walks, and solstice events so that visitors will want to keep coming back for different experiences.

Current links with local and national schools and universities will be expanded and the Trust will continue to support the Woodbridge Riverside Trust, a community project which is going to build a replica of the Sutton Hoo ship.

Mike said: "We want to create a more immersive and emotional experience - less 'read' and more 'see and do'. We just hope people will be wowed."

Turnover in 2017 and comparatives



Forecast turnover in 2018

**67%**

Increase

**9%**

Decrease

**24%**

Unchanged

If turnover increased in 2017, expected in 2018?



Don't know - 5%  
Unchanged - 17%  
Decrease - 6%  
Increase - 72%

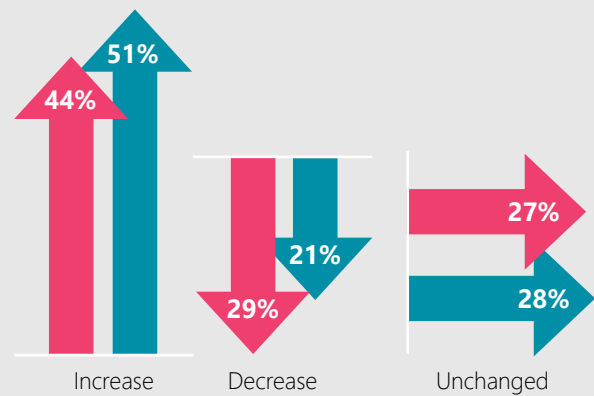
If turnover decreased in 2017, expected in 2018?



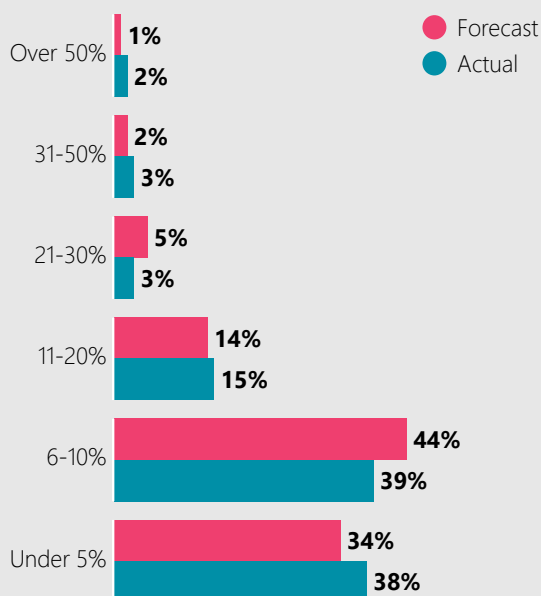
Don't know - 9%  
Unchanged - 24%  
Decrease - 15%  
Increase - 52%

Profit levels in 2017 and expected for 2018

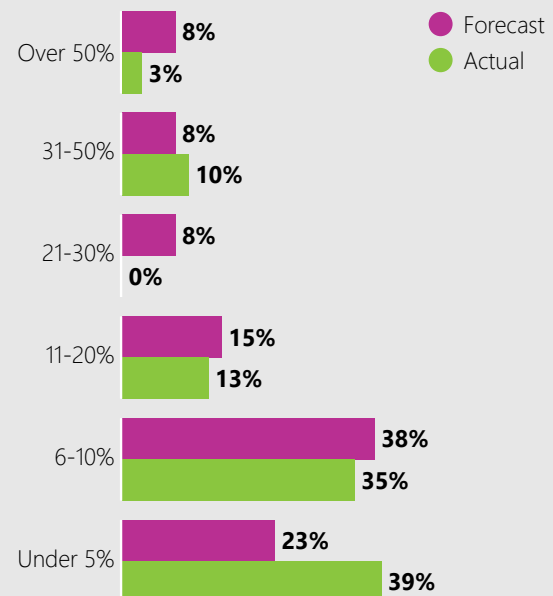
● 2017 ● 2018 forecast



Turnover increase in 2017 and forecast for 2018



Turnover decrease in 2017 and forecast for 2018



# Joining forces pays dividends for tourism

Pulling together is a must in the 21st-century tourism industry. Across Norfolk, Suffolk and Essex there are first-class examples of how collaboration and sharing resources at all levels results in big benefits for all.



The Broads

Communication and working together are at the heart of Broads Tourism's success, according to its new chair, Ruth Knight.

Membership of Broads Tourism, DMO for the Broads, increased more than threefold in under two years during the chairmanship of Greg Munford, from 50 members in May 2016 to 155 at the start of 2018.

Members are attracted by a DMO which works closely with its eight corporate sponsors, the Broads Authority and local authorities and is able to tap into grant funding, all aimed at promoting the Broads in Norfolk and Suffolk.

Members are nurtured by a development co-ordinator and are encouraged to share ideas and best practice. "Rather than spending marketing budgets individually, businesses belonging to Broads Tourism are coming together to spread the message further afield, giving them more clout and



a louder voice," said Ruth (pictured), who previously served as chair of Broads Tourism's marketing steering group and owns Waveney River Centre with her husband, James.

"Members also have access to more information and the support of like-minded businesses. If something is working well in one area, it can be introduced in another."

A growing partnership with the Broads Authority means that members are reaping the benefits of its work to promote the Broads National Park brand, which it is hoped will soon be used on road signs.

The support of corporate sponsors such as publishing company Archant

was also crucial, said Ruth. Archant had helped Broads Tourism re-brand its three publications to make them more visitor-friendly. Last month thousands of copies of Broads Tourism's Visit the Broads National Park magazine were distributed alongside Archant's county lifestyle magazines in areas including Yorkshire, Hampshire, Derbyshire, Berkshire and Buckinghamshire. The Visit the Broads website has also been re-branded.

An estimated eight million visitors each year contribute around £600 million to the Broads economy (*Broads Authority*).

Ruth wants to see those figures rise even further and plans include marketing the Broads as a year-round destination, promoting attractions like spring and autumn bird watching. She said: "We're on a roll and we've got lots more ideas in the pipeline."

## Co-operation is key to success

From Visit Essex to local authorities, businesses and the voluntary sector – everybody in Essex is joining forces to promote their county and its many and varied attractions.

Working closer together with local authorities is paying dividends, according to Lisa Bone, strategic tourism manager with Visit Essex, who said it was one of

the main factors behind an increase of about three percent, according to the latest figures, in both the value of tourism to the Essex economy (some £3billion) and visitor numbers (51.6million).

Co-operation also frequently extended to a national level, said Lisa, with counties pooling funding and coming together to exploit a common theme.

2018 will see a variety of national projects with which Visit Essex is involved, all attracting VisitEngland and Discover England Funding (DEF). One such project is Gourmet Garden Trails, which aims to entice, not only national visitors to England's top gardens open to the public, but also tourists from countries such as the Netherlands and France.

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## CONTINUED FROM PREVIOUS PAGE

Counties involved are sharing a £1million pot of DEF cash, creating bookable packages which will take visitors around the country to view gardens and enjoy quality nearby food and drink establishments.

Among destinations in Essex are the Beth Chatto Gardens, near Colchester, and Royal Horticultural Society garden Hyde Hall, Chelmsford.

“Co-operation at national level is

hugely important to us because there is a big lack of perception about what Essex has to offer. These projects mean we can promote the history and culture of Essex on a national stage and position the county in a different light,” said Lisa.

In that vein, Visit Essex is also delighted to be working with Kent and East Sussex on a Culture Coasting project, benefiting from £350,000 of DEF and £500,000

from the Arts Council. Destinations have also contributed sums towards the scheme. The project aims to introduce visitors to the artists and galleries along part of the south-east coastline, helped by a geocaching trail – a treasure hunt for GPS users who use co-ordinates to find the hidden locations. Participants will also be able to stay in artists’ homes and take part in workshops led by them.



Lisa Bone



## Marketing focuses on providing unique experiences

In a first for Suffolk, towns and villages are collaborating on a countywide marketing campaign which it is hoped will lead to an increased spend on out-of-season breaks.

Named RAW SUFFOLK, the campaign is aimed at enticing the under 35s to the county to enjoy the things they value – authenticity and simplicity.

It’s the brainchild of the county’s relatively-new Destination Marketing Organisations (DMOs) and Tourist Actions Groups (TAGs).

Marketing focuses on adventurous outdoor ideas including skydiving, speedboat rides, and glamping under the stars. There are also cosier concepts such as enjoying a glass of real ale in front of a roaring fire while tucking into a bowl of freshly-caught oysters before falling asleep in a boutique hotel to the sounds of waves crashing and waking up to panoramic sea views.

#RAWSUFFOLK is all about showcasing Suffolk’s unadulterated beauty and simplicity, and highlighting all that the county has to offer and not just its beautiful coastline.

Amanda Bond, from Visit Suffolk, said: “RAW SUFFOLK celebrates some of the key tourism hotspots and authentic experiences available in our wonderful county. For those looking for the simple things in life, it presents a smorgasbord of thrills, adventure and pure indulgence in one simple dose, giving visitors inspiration for their next UK mini-break. The campaign has been a collaborative effort between the destinations within Suffolk to raise their profile and work alongside the county brand.”

Sue Warren, from Bury St Edmunds & Beyond, said: “Visitors do not consider geographic or political boundaries when

they are searching for inspiration for their next trip so it is great that we are working with other destinations in Suffolk, collaborating and cross-promoting our areas in this way.

“We have a great offer both individually and collectively which we hope will encourage more people to stay here in Suffolk for longer.

“In particular, here in Bury St Edmunds, we are known for our heritage attractions, but we also have a fantastic foodie and shopping offer along with some very unique experiences which we know will appeal to the under-35 audience.”

RAW members include All About Ipswich DMO, Bury St Edmunds & Beyond DMO, The Suffolk Coast DMO and Heart of Suffolk under Babergh and Mid-Suffolk District Council, supported by Visit Suffolk.



# CHANGING PERCEPTIONS

Visit Essex has been supporting the Harwich and Dovercourt Tourism Group, chaired by hotelier and restaurateur Paul Milsom. Formed in 2015, the group is a prime example of collaboration in action.



Paul Milsom

The aim is to change out-of-date perceptions about Harwich and attract visitors to enjoy its maritime history, range of independent shops, culture, food, drink and accommodation, and the nearby Blue Flag sandy beach at Dovercourt.

Their labours are already beginning to bear fruit, says Paul. The town is confident that visitors will flock there in 2020, the 400th anniversary of the Mayflower's voyage from Plymouth UK to Plymouth Massachusetts (see page 15 for more).

"I think the perception of Harwich has not been good in the past, with the town suffering from under investment, but actually it is a good place to visit. We just need to let people know and the Mayflower story is a massive opportunity to do that," said Paul.

In January last year, the town was awarded Coastal Community status by the Government, with a £10,000 grant to help Harwich attract more visitors. "This has opened the doors to other sources of funding, including cash from Tendring District Council, so that there is now a pot of about £35,000," said Paul. "We're keeping it simple. We now have an Historic Harwich – Home of the Mayflower logo and we're looking at signage in the town, much of which isn't fit for purpose."

Businesses and individual organisations in the town have also been doing their bit.

"Over the years there has been much investment in the town including narrowing of the road on the quay, enhancement of the Ha'penny Pier, as well as our own at the Pier Hotel and restaurant. Many other businesses are also stepping up to the mark and investing," he added.

Paul praised the efforts of Christian Zemann, owner of the Harwich Harbour Foot Ferry. Since buying the business four years ago Christian has invested in a bigger boat, which can take up to 58 passengers, with more and later sailings. As a result, annual passenger numbers have increased from 12,000 to 30,000.

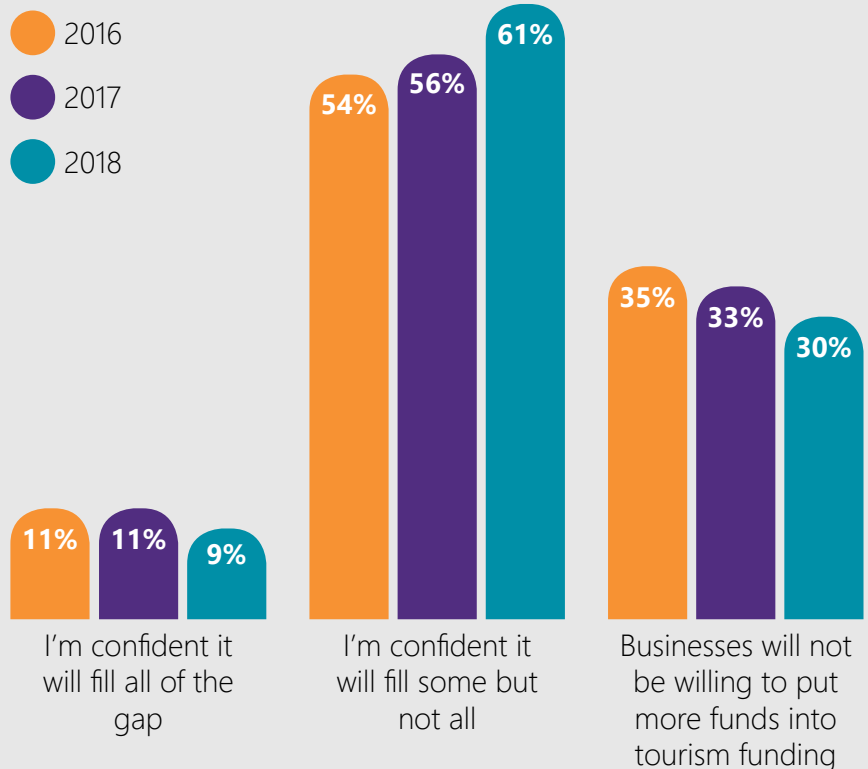
As well as local businesses, its members include representatives from the Harwich Haven Port Authority, The Harwich Society, Harwich Festival, the Pier at Harwich, Harwich Harbour Ferry, Catten College, Essex and Suffolk Community Rail Partnership, as well as Harwich Town Council, Tendring District Council and Essex County Council.

Are you a member of or engaged with DMOs?

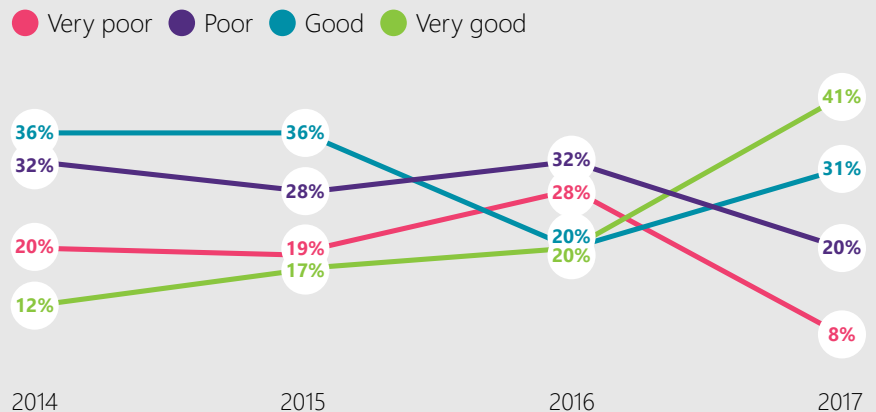


**29%** of people said they're a member of two or more DMOs.

As the public sector looks to withdraw spending for tourism, how positive do you feel that the private sector will fill that gap?



How well do you think your DMO promoted your area?



# Harnessing new technology

South Norfolk Council (SNC) is using £116,000 from the European Agricultural Fund for rural tourism to develop a unique pilot trail. It uses augmented and virtual reality via a free “Wymtrails” app which can be downloaded on any smart device to take visitors on a tour of Wymondham.

If the five-year pilot is successful, the plan is to roll it out to the other South Norfolk market towns, Diss, Harleston and Loddon, adapting the basic technology to exploit the particular strengths of each town.

Due to be launched in 2018, the new app will take visitors on a walk through Wymondham’s past, bringing its rich history to life. Meanwhile the under-10s can accompany the grown-ups, but following their own fun trail, led by Henry the Hare.

The council has been working on the project since last year, and has recently created the Tiffey Valley Local Tourism Action Group (LTAG) in conjunction with Wymondham-area businesses.

“Our overall objective is to increase visitors to Wymondham and their time spent there in order to boost the local economy. This is in response to a desire to create more reasons to visit the town that would also appeal to all ages, interests and budgets as well as being fun,” said South Norfolk councillor Michael Edney. “Using technology in this way is new and innovative and I believe deserves national recognition.”

He continued: “The project has been well-received by local businesses, who are very

excited at the opportunity it presents. Many are helping, from getting the app ready to being actively involved in launch events.”

Visitors can also use the app to find out what else Wymondham and the surrounding area have to offer in the way of places to eat and drink, shops, accommodation and other attractions.

Award-winning Norwich agency Immersive VR is creating the Wymondham app with the adult trail focusing on the story of Kett’s Rebellion. Wymondham is in flames around you as you stand in its Market Place. A few minutes later you’re surrounded by the tents and campfires of rebels on Norwich’s Mousehold Heath, led by Wymondham man Robert Kett. You go into battle with them against the King’s supporters.

Meanwhile, your children are following a giant hare through Wymondham’s streets, picking up items dropped from a satchel it’s carrying.

Next, a Wymondham farmer, who in 1549 led an unsuccessful revolt against the enclosure of land. He and 16,000 followers seized Norwich but were defeated and Kett was hanged at Norwich Castle. Historical accuracy is important to the project and South Norfolk Council, with local and county experts, consulted at every



stage. Visitors are prompted to swipe their smart device at certain points to see the streets and buildings as they would have looked in Kett’s day while his story is gradually told.

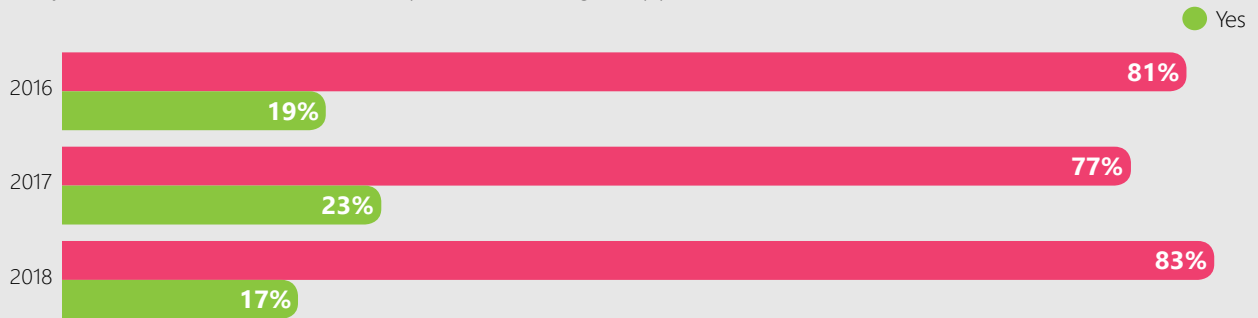
And in Wymondham Heritage Museum they will be able to put on a virtual-reality headset and spend a mind-blowing five minutes reliving Kett’s battle in 360° colour, spectacle and sound.

Other Wymondham stories will unfold in dramatic app scenes en-route.

To help promote the app, Wymondham has developed a children’s trail to be used this summer as part of the GoGoHares trail. In support of charity Break’s 50th anniversary, Norfolk will play host to 50 “ears up” hares in Norwich and 18 flat-eared hares will be dotted around Norwich. Wymondham has bought Moongazer Henry, who will be sited in the Market Place.

During his caper, six objects will fall out of the satchel Henry carries and the app will prompt the children to find and collect them. At the end, children can take a selfie with Henry and the app will show him giving them a congratulatory hug!

Do you feel that the Government provides enough support to the Travel and Tourism sector?



With reduced government spend, what will you do to fill the gap?





## THE LAST WORD

Last year was an interesting year and 2018 and beyond will offer many challenges as well as plenty of opportunities.

Our 2018 Tourism and Leisure Business Survey was again well supported and I would like to thank all of you who have participated in it and all those who have helped to promote it. Without your support and input we would not be able to put this together.

We continue to work closely with Visit Norfolk, Visit Suffolk, Visit Essex and Visit East Anglia, and I have really appreciated the support on a more local level of the local destination marketing and management organisations (the number of which I am pleased to report is growing).

For this reason, as you will have seen, we have given some of them a voice to showcase what they are doing at a local level, to help make our area even more successful.

I am also very grateful to all the businesses who have participated in the articles, bringing to life ideas and activities.

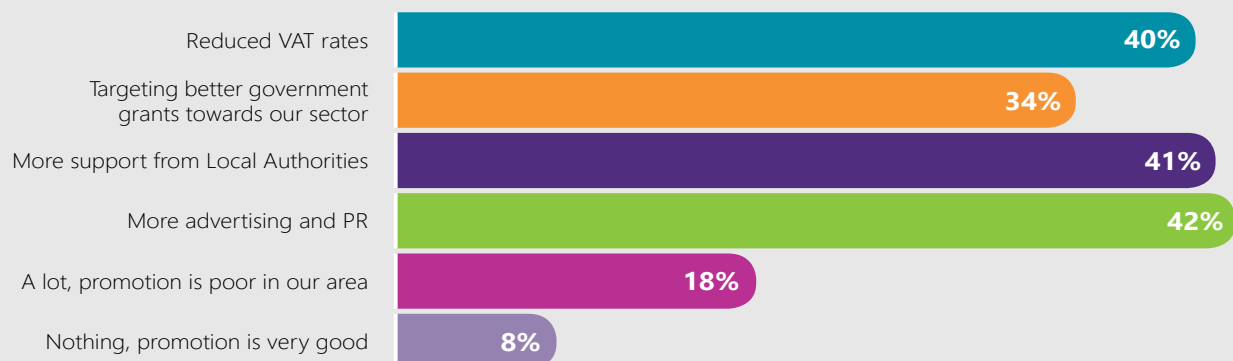
I trust the survey data and articles presented are balanced and take in equal measure the confidence and elements of scepticism for the future and that we have touched on some of the complex aspects that will affect all of us.

As always, feedback is most welcome on what you would like to see in future publications and any areas that may interest you or require more attention.

We have again been supported in the production of this report by our commercial partners so I would also like to thank Adnams, Camplings Linen Services, Hugh J Boswell Financial Services and Howes Percival for their support.

I hope you have enjoyed reading it.

What more could be done to promote your region and improve business in your area?







## GET IN TOUCH

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