The impact of investments & storms on the economic benefits provided by the South West Coast Path National Trail to the region between 2010 and 2014

Key findings

Between 2010 and 2014:

- South West Coast Path users grew by 11% from 7.8 million to 8.7 million / year;
- Expenditure by South West Coast Path users increased by £86.7 million from £382 million to £468 million;
- Number of full time equivalent jobs sustained by expenditure incurred by South West Coast Path walkers increased by 1,877 to 10,610;
- Overall spend by South West Coast Path walkers increased by 22.7%, compared to 12.2% for tourism as a whole within the region.
- The slight decline during 2014 is thought to be a result of the damage to the Coast Path and other infrastructure by the storms of early 2014.

This demonstrates how investment in the South West Coast Path, as a key rural tourism infrastructure asset can deliver growth within the tourism sector.

More detailed results and breakdown of the figures on a county by county basis are in the main body of the report, and along with source data can also be found at www.southwestcoastpath.org.uk/research.
Introduction

This report summarises the changes that have resulted from continued investment in the South West Coast Path between 2010 and the end of 2014. It is based on annual economic monitoring studies undertaken on behalf of the South West Coast Path by the South West Research Company Ltd.

This research is based on a face to face survey of over 2,500 visitors across the region to improve our understanding of the movement of staying visitors whilst on holiday. This along with analysis of national datasets (the three main national tourism surveys; Great Britain Tourism Survey, Great Britain Day Visits Survey and the International Passenger Survey) enabled modelling to be set up to estimate the volume of usage and economic value of the South West Coast Path to be measured. The total expenditure incurred by Coast Path walkers was then used to estimate the number of full time equivalent jobs sustained by using data from the Office of National Statistics and the Cambridge Model.

Notable events

The increase in usage of the South West Coast Path is considered to a result of the investment that has been made in infrastructure and promotion, and growth would probably have been higher if it wasn’t for the extreme weather of 2012 and early 2014, which damaged numerous sections of the South West Coast Path and deterred many visitors. To provide context for the detailed results shown overleaf, the key events that are likely to have impacted on usage of the South West Coast Path are:

July 2010 - March 2014: The Rural Development Programme for England invests £2.1 million into the Unlocking our Coastal Heritage project. The overall aim of this project was to increase the economic value of the South West Coast Path by protecting and enhancing economic features, improving the quality of the route and working with businesses to improve the facilities and information provided to visitors. More details of this project and its outputs can be found at www.southwestcoastpath.org.uk/UCH.

April - December 2012: Rain! Although the year started with a drought, the situation was then transformed by the wettest April and June in the England and Wales since 1766, while summer (June, July, August) was the wettest since 1912. Rainfall totals for autumn and December remained well above average, and a succession of rain events in late November and late December contributed to extensive disruption from flooding. (Source: Met Office) As well as deterring walkers, this exceptional rainfall is assumed to be the cause of a record number of cliff falls that affecting the Coast Path during late 2012 & early 2013.

February 2014: Two storm surges cause further cliff falls and damage to low lying sections of the Coast Path resulting in additional inland diversions. Between October 2012 & March 2014, over 50 sections of the Coast Path were damaged or lost due to cliff falls or flooding, resulting in temporary closures and walkers diverted inland. This compares to typical year when we would expect 3 or 4 cliff falls affecting the path over the 630 mile long route.

October 2014: £1 million investment secured from the Coastal Communities Fund to repair Coast Path Storm damage, undertake marketing and build the capacity of the South West Coast Path Association.
Number of South West Coast Path Visits

With the exception of 2014, there has been a year on year increase in the number of visitors to the South West Coast Path. However most of this growth has been in day visitors, whilst there has been a slight decline in staying visitors, particularly in 2012 and 2014, when the region suffered from exceptionally bad weather.
South West Coast Path User Spend

With the exception of 2014, expenditure by South West Coast Path users has increased year on year. The downturn in staying visitors in 2012 was offset by a much larger increase in day visits – but as day visitors spend considerably less than staying visitors, the increase in overall expenditure was relatively low.
Employment sustained by South West Coast Path user expenditure

Until 2014, the increasing expenditure by South West Coast Path walkers sustained a steadily increasing number of full time equivalent (FTE) jobs.

The downturn in spend and associated employment during 2014 (driven by a reduction in staying visitors) was expected following the storms that severed many part of the Coast Path in early 2014. We had reports from businesses that their trade was down by as much as 25% compared to the previous year. Based on feedback from their guests they attributed this as being largely due to the impact of the closures of nearby sections of the Coast Path. As a result the Association launched an appeal to undertake repairs, and with the help of businesses raised nearly £30,000. This support helped secure Coastal Communities Funding to undertake repairs at 32 locations. With the repairs now largely complete and an upturn in visits to the website and purchases of walk information this could be an indicator of continued growth during 2015 (which will be published in November 2016). However, the decline in 2014 illustrates the vulnerability of the South West Coast Path, and if the quality of the route is not maintained how this deters visitors.

Website Traffic

Considerable investment has been made (RDPE, CCF and partner funding) to improve the content and functionality of the www.southwestcoastpath.org.uk website and to then promote it as the primary source of information for anyone planning to visit. Since 2010, visits to the website have more than doubled. As the South West Coast Path has had very limited resources for promotion outside the UK, visits to the website from overseas has not increased as rapidly, and so now forms a slightly smaller proportion of overall traffic.
Development and promotion of the website is a key focus of the current Coastal Communities funded work, and although not shown on the graph, web visits in 2015 have continued to increase and by the end of November the site had received over 800,000 visits.

![Annual Website Visits](image)

![Location of website visitors](image)
As can be seen from the chart below, the largest source of non-UK visits to the website are Germany, USA, EU and commonwealth countries.

Comparison with tourism as a whole

We have provided a comparison with the overall value of tourism within the South West Coast Path county area, against the 2010 baseline to provide context for the increased economic benefits provided by the South West Coast Path.

In 2010, 8% of overall tourism spend was attributed to South West Coast Path users, rising to 8.7% in 2014. This is considered reasonable as separate research undertaken by Visit Cornwall during 2011, found that 81% of visitors will go for a short walk during their stay and 41% will undertake a walk of half a day or more. Over the same period, overall tourism spend increased by 12.2% (source Visit Britain), whilst spend attributed to South West Coast Path users rose by 22.7%. The source of these figures is a combination the three main national tourism surveys; Great Britain Tourism Survey, Great Britain Day Visits Survey and the International Passenger Survey, with analysis undertaken using the Cambridge Model.

During 2014, expenditure by South West Coast Path walkers in Dorset continued to grow in comparison to the decline experienced in Devon and Cornwall, and this supports the view that storm damage to the Coast Path and other infrastructure was major factor. Of the 32 sections of Coast Path being repaired using Coastal Communities funding, only one was in Dorset, as this section of coast escaped relatively unscathed from the storms (see map overleaf for locations of major damage).
Coast Path locations requiring major repairs during 2014 & 2015.

Report produced by South West Coast Path National Trail Officer on behalf of the South West Coast Path partnership. December 2015.

More details available at www.southwestcoastpath.org.uk/research