



# **South West Coast Path Monitoring & Evaluation Framework Year 2 (2012) Key Findings Summary**

Produced for and on behalf of the South West Coast Path Team  
By  
The South West Research Company Ltd

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**South West Coast Path**  
*630 miles of stunning scenery*



[www.tswrc.co.uk](http://www.tswrc.co.uk)

## Background

As the longest of the 13 national trails in England and Wales with a length of 630 miles, The South West Coast Path follows the coastline of England's south west peninsular and is recognised as one of the region's principal tourism attractions and leisure facilities. Starting at Minehead in Somerset, it follows the coastline of Devon, Cornwall and Dorset until it reaches its end at Poole Harbour.

Between 2010 & 2013, the £2.5 million 'Unlocking our Coastal Heritage' project, largely funded by European grant aid through the Rural Development Programme for England (RDPE) has through a range of integrated activity and key projects has raised the profile of the SWCP as a 'cultural corridor' with a wealth of historic, artistic and cultural heritage – as well as its more recognised environmental quality. This summary provides a brief overview of the key outputs from research commissioned to enable the South West Coast Path Team to monitor its success in achieving these aims. The final research report will be available once Visit England data for 2013 is made available.

For the purpose of this project the definition of a coast path visit includes: ***“Any visit to an 'other coastline area' as opposed to a beach, resort or town for leisure purposes and in line with the national tourism day visitor definition”***. The estimates do not include regular non-tourism residential use such as dog walking etc.

**For details of the methodology used please refer to the full year one report. Please note that as a result of changes to the Great Britain Day Visits Survey (GBDVS) years prior to 2012 have been recalculated and may not match the original published figures in March 2013.**

### Key volume & value findings

- Total SWCP users for 2012 were estimated at 8.6 million compared with 8.01 million users during 2011 representing an increase of 7% and driven by increases in day visits from home and day visits from holidaymakers staying in non-coastal locations. This doesn't include non-tourism use by local residents, such as regular dog walkers.
- These 8.6 million SWCP users account for 5% of all visitors to the South West region during 2012 (178.5 million).
- A total direct spend of £436m was estimated to be attributable to SWCP users during 2012 – a 14.3% increase on 2010 spending levels (£381m). This is despite the exceptionally wet weather experienced in the latter part of 2012, and is in line with Visit England's target of growing the tourism industry 5% year on year.
- 76% of this spend was attributable to staying visitors (£333.2m) and 24% (£102.9m) day visitors.
- This £436m accounts for 4% of all direct tourism spend in the South West region during 2012 (£10,479m).
- When supplier and income induced expenditure arising as a result of the SWCP direct visitor spend are calculated the total local business turnover supported by SWCP activity in 2012 is £623m.
- The associated employment related to spending by SWCP users is estimated at 9,771 full-time equivalent jobs (FTE's) – a 2% increase on 2011 estimates (9,600 FTE's).
- The tables overleaf show a breakdown of the key volume and value results by county.

<b>SWCP users summary 2012</b>	<b>Cornwall</b>	<b>Devon</b>	<b>Dorset</b>	<b>Somerset</b>	<b>Total</b>
<b>Total SWCP users</b>	2,254,947	3,216,259	2,738,959	380,532	<b>8,590,698</b>
<b>Total SWCP users spend</b>	£172,683,102	£157,402,419	£94,504,846	£11,592,751	<b>£436,183,118</b>
<b>Total business turnover supported by SWCP activity</b>	£250,934,000	£227,411,000	£131,191,000	£13,731,000	<b>£623,267,000</b>
<b>Associated employment (FTE's) related to SWCP user spend</b>	4,129	3,514	1,924	203	<b>9,771</b>
<b>Estimated GVA</b>	£140,719,000	£127,752,000	£73,527,000	£7,647,000	<b>£349,645,000</b>

### **Coastal Visits Survey 2012 – key findings**

- 52% of respondents interviewed as part of the Coastal Visits Survey 2012 said that they go for a walk on the cliffs/headland when visiting the South West coast.
- 41% of all respondents who indicated that they took part in some form of walking when visiting the South West Coast stated that walking along the South West Coast Path (SWCP) had been 'important' (21%) or 'very important' (20%) to them when deciding to visit the South West on their current trip including 43% of respondents who were staying in a coastal location. This proportion increased to 58% amongst cliff/headland walkers.
- 14% of respondents who indicated that they had taken part in some form of walking when visiting the South West Coast indicated that being able to walk along the South West Coast Path (SWCP) was the main reason for their visiting the South West on their current visit. This proportion increased to 24% amongst cliff/headland walkers.
- Satisfaction levels were high for almost all aspects of using the Coast Path with 95% of cliff/headland walkers rating their overall experience of using the Coast Path as 'very good' (66%) or 'good' (29%).
- The most important factors that walkers quoted for choosing a walk were: Attractive views & scenery; a clearly signposted path; path being away from roads; not being overgrown with vegetation; having destinations & distances on fingerposts and a good path surface which is reasonably mud-free

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