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Research Note

Wales Coast Path – End of Project Report

Resources for Change Ltd, with Asken Ltd.



Llwybr Arfordir Cymru
Wales Coast Path



Llywodraeth Cymru
Welsh Government



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About Natural Resources Wales

Natural Resources Wales brings together the work of the Countryside Council for Wales, Environment Agency Wales and Forestry Commission Wales, as well as some functions of Welsh Government. Our purpose is to ensure that the natural resources of Wales are sustainably maintained, enhanced and used, now and in the future.

Wales' landscape, environment and wildlife are amongst its greatest resource, worth more than £8bn to the Welsh economy.

- We will work for Wales' economy and enable the sustainable use of natural resources to support jobs and enterprise. We will help businesses and developers to understand and consider environmental impacts when they make important decisions
- We will work for the communities of Wales to protect people and their homes as much as possible from environmental incidents like flooding and pollution. We will provide opportunities for them to learn, use and benefit from Wales' natural resources
- We will work to maintain and improve the quality of the environment for everyone. We will work towards making the environment and natural resources more resilient to climate change and other pressures.

We are the principal adviser to the Welsh Government on the environment, enabling the sustainable development of Wales' natural resources for the benefit of people, the economy and wildlife.

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RESEARCH NOTE

INTRODUCTION

Action to take forward the idea of a coastal path that would stretch the whole length of the Welsh coast was first made in 2005, when the Welsh Assembly Government asked the then Countryside Council for Wales to explore how it could be achieved. Plans were developed and work started in 2007, with the aim of delivering the complete path and give an economic boost to a 2km-wide coastal zone (funded by the Welsh Government (WG) under the Coastal Access Improvement Programme – CAIP). However, EU funds were secured through the Welsh European Funding Office (WEFO) in 2009, leading to a change in objectives and timetable. Delivery of the completed path (the Wales Coast Path – WCP) was brought forward to 2012 and a number of targets set for key outputs. Thus, two closely related targets emerged – those set by WG for the CAIP in ‘Non-Convergence’ areas (i.e. those not in receipt of EU funding, representing about 13% of the WCP by length) and those set by WEFO for the WCP Project in ‘Convergence’ areas (i.e. those in receipt of EU funds, representing about 87% of the WCP by length).

In September 2013, Natural Resources Wales commissioned Resources for Change and Asken Ltd to prepare an end of project report on the achievements of the CAIP/WCP to date. This involved provision to the consultants by NRW of a wide range of documents, reports, datasets and bid documents for review and analysis.

The intention was to complement this with some qualitative learning and reflection that would inform future work on the Wales Coast Path. This Research Note summarises this exercise, drawing on material from the full end of project report, but also including some additional thinking.

CONTRIBUTIONS MADE BY WCP TO KEY POLICY OBJECTIVES

The WCP has the potential to contribute to a number of important policy objectives, namely in the areas of tourism development, economic development, access and recreation development, and health. The end of project report provides information on the extent to which the WCP has already begun to do so. From this, some key points emerge which are discussed in this section.

Tourism development

Monitoring data shows that a more accurate term to use may be ‘visitors’ rather than tourists, as more than half of users travel from home for their walk on the Path. Also, the proportion of users who are holiday makers varies with location and is much more important in some areas than others. For example, just 8% of users between Cardiff and Monmouthshire are holiday makers, whilst on stretches of the Path between Pembrokeshire and Carmarthenshire, this rises to 57%.

Also relevant to tourism development is the emerging pattern of associated accommodation use, with the most popular type of accommodation being caravan and campsites (41%), followed by self-

catering (21%); 12% stay with friends and families, 9% in a hotel and just 2% in a hostel or bunkhouse. This data describes current usage patterns, but does not tell the story behind the data. If information were available about why these accommodation choices were made, and what WCP users' preferences and aspirations are, it would help businesses and support agencies within the tourism sector to plan and deliver well targeted accommodation developments, with knock-on economic development benefits.

This is supported by anecdotal evidence from local authority officers indicating a growth in interest in the WCP from visitors, as suggested by increasing numbers of user enquiries directly to the local authority, as well as with tourist information centres. One authority reported specific demand for information about accommodation close to the WCP.

Economic development

It is clear that the WCP is making a noticeable positive impact on the Welsh economy, quantified as an estimated net injection of £23.6m. It is assumed that businesses receiving this then re-spend it in successive indirect rounds (e.g. accommodation providers purchase goods and services to meet needs of their visitors, and so on), increasing local wealth and in turn, levels of spending. The overall economic impact is determined in changes in output, gross value added (GVA) and employment. This additional £23.6m of spending activity in the regional economy was associated with £15.9m of GVA. When assessed by industrial sector, it can be seen that the impact was most concentrated in Accommodation (£5.1m GVA) and Restaurants/Bars/Cafes (£2.3m GVA). However, it is significant that there is also impact for financial and business services (£1.8m GVA) and transport/communication (£1.8m GVA). This demonstrates that the WCP has an economic role to play over and above tourism development alone.

In terms of impact on employment i.e. as created by visitor spend, the indicative estimate of employment associated was around 715 person-years. Again, the greatest impact is felt in accommodation and restaurants, but also noticeably in distribution/retail, transport and communication, and financial and business services.

It is clear that the WEFO's strict reporting requirements for job creation are extremely difficult for a project such as this one to meet. However, there are clear indications that new jobs have been created, with one study finding that 28.2FTEs were employed as a result of the WCP. There would be benefit in continuing the discussion with WEFO officers about appropriate ways to monitor and record job creation, so that the impacts of future projects can be fairly represented.

Access and recreation development

The establishment of the WCP has contributed to access and recreation policy imperatives set out in various policy statements, starting with those in "Wales – A Better Country" (WAG, 2003) through extending access to coastal areas. Around 80km of new linear access has been created, all of which

conforms to Least Restrictive Access principles, thus opening up opportunities for all for access and recreation.

Also, it is likely to be the promotion of the route (in whole or in parts) as a desirable place to walk that has had a bigger effect on increasing user numbers. Promotion activities include the WCP website, press releases and media coverage achieved. To give some indication of the scale of information accessed by the public, the WCP website received 152,887 visits between October 2012 and September 2013; the vast majority of these visitors were UK based, but of the non-UK based website visitors, the most common location was USA and followed some way behind by Germany and Canada. An evaluation of media coverage between December 2011 and June 2012 shows 833 items mentioning WCP, of which only 6 were negative in tone. There was a noticeable surge in interest (as measured anecdotally by queries to the WCP team) following Lonely Planet's inclusion of WCP in its 2012 Top Ten best regions for travel (alongside worldwide locations including India, New Zealand, Central America and Canada).

There are a number of elements that work synergistically to create potential for the WCP to contribute significantly to meeting access and recreation policy aspirations. These include: creating new sections of Coast Path, with associated initiatives improving links and providing opportunities for local and circular walks; improving the condition of existing sections of Path, opening up the opportunity to a wider range of potential users and making it a more pleasurable experience for all; improving information and creating awareness about what the Path offers, so that more people may think of using it; providing potential for new and existing businesses to provide a useful service to users and therefore improve their experience of the Path.

Health

There was no specific target for the CAIP/WCP project to contribute to health objectives, and therefore no specific information was found which links gains in the health and well-being of the Welsh population that is attributable to the WCP. This omission is being tackled in 2014, with NRW commissioning targeted research to evaluate the health benefits accruing from use of the WCP. It is likely that users of the WCP have experienced benefits commonly reported by other users of 'the outdoors', including a range of physical and mental health benefits, but it is important that this relationship and the nature and scale of the benefits are understood.

Future development of the WCP could usefully incorporate direct and indirect actions work to contribute to Welsh Government objectives for health improvements. An example of direct work would be a walks initiative following the model of Let's Walk Cymru; an example of indirect work would be enabling the WCP to form part of a locally accessible purposeful route so that it can contribute to active travel for local residents.

NRW and local authority staff could play a useful role in disseminating information about the health benefits that WCP offers, and to share learning about initiatives which support this.

LOOKING TO THE FUTURE

Now that the WCP is in place, the focus will change for local authorities and NRW from an intense period of establishment to one of on-going improvement, maintenance, promotion and management.

Monitoring and analysing impact

The targets set specifically for the WCP/CAIP project could usefully be re-thought in the light of the long-term objectives for the Wales Coast Path. The composition of future objectives and outcomes is a subject for in-depth debate and agreement internally within NRW (and in line with its emerging Corporate Plan) and between NRW and Welsh Government (focussing on the Shared Outcomes agreed). These might include:

- Maintenance – so that the creations and improvements made in order to establish the WCP remain in a condition for users to be able to use and enjoy the Path, e.g. to the minimum Performance Indicator standards.
- On-going improvements – so that the WCP remains a high quality user experience, and there is a focus on particular identified priorities, such as Least Restrictive Access, to enable a wide range of users to take advantage of the Path.
- Economic impact – so that the contribution of the WCP to the Welsh economy is documented and recognised. There are a number of aspects to this (as evidenced by the targets and measures reported on to date), and the discussion must agree which are the most meaningful and relevant, as well as manageable to measure. This discussion will include whether tourism impact forms part of a wider economic impact monitoring exercise, or is standalone. In either situation, it should be re-focused to clarify that it refers to both visitors and tourists.
- Health and well-being impact – so that the contribution of WCP is documented and recognised. Measurement of health and well-being is notoriously complicated; the 2014 health benefit research could provide useful insights into what measures are likely to be meaningful, relevant and manageable to measure.
- Usage – current practice is centred around monitoring from visitor counters, as is standard in the sector. The exercise of compiling data for the End of Project report exemplified the range of issues that tend to be experienced when using this form of monitoring. It may be useful for NRW and local authorities to come together to formulate an agreed plan for visitor counter-based monitoring (which may require some investment in infrastructure), so that there is a base of infrastructure that allows for effective on-going recording.

Implementing lessons from the project to date

The End of Project report for CAIP/WCP project presents lessons in a number of broad themes

(project management, funder requirements, staffing, rights of way related matters, and marketing and communications) as well as some relating specifically to local authorities. The key issue now is the extent to which these lessons can be applied to future work on the WCP, and how best to do this.

In the first instance, all NRW staff with a role to play in the WCP should familiarise themselves with the learning presented in the report. It may be helpful to pull people together into a short workshop to agree a simple set of actions to apply to WCP work from now on, as well as messages that need to be shared with other teams within NRW and external partners too. Note that there is likely to be a benefit in disseminating key lessons more widely, as many aspects are generic to project management (although learnt through the WCP project) and therefore are applicable to any new project development.

NRW also has a role to play in supporting and enabling local authority officers with responsibility for WCP to consider emerging learning, and how to apply it. There is already useful networking and information - and (in some cases) staff - sharing between local authorities, both formally and informally; the lessons presented in the End of Project report provide a focus for discussion, including the potential for collaborative action.

Reflections

Creation of the Wales Coast Path was an ambitious project, but one which does not stop with its formal opening. It is clear that there have already been significant benefits, across a wide range of themes and localities.

The challenge now is to maintain this resource and to make the most of the opportunities that the WCP offers for Wales and its visitors. In the current economic climate, there is considerable anxiety about how this can be done. A first step is to have the information available to demonstrate the value that it offers, as one of the routes to create an appetite for investment. It must be expected that this investment will be made up of a patchwork of input: financial and in-kind; from the public, private and third sector; in many different local authority areas.

It will be a challenge to set objectives for the WCP's future. They need to be achievable within the likely available resources; they should be aspirational, yet realistic; they need to be well targeted to achieve the most desirable outcomes (which in themselves need to be defined).

The establishment of the Wales Coast Path has exceeded expectations, as measured by its original project targets. Its goals for the future must be set, and the mechanisms put in place to measure effectively its achievements and its contributions to Wales.