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## THE WALES COAST PATH VISITOR SURVEY 2011-13

## THE ECONOMIC IMPACT OF WALES COAST PATH VISITOR SPENDING ON WALES 2013



Llwybr Arfordir Cymru  
Wales Coast Path



## 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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# **The Wales Coast Path Visitor Survey 2011-2013**

## ***The Economic Impact of Wales Coast Path Visitor Spending on Wales 2013***

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**October 2013**

**Report for:**

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## **Arolwg Ymwelwyr i Lwybr Arfordir Cymru 2013**

### **Crynodeb Gweithredol**

Mae'r adroddiad yma, a rannwyd yn ddwy adran, yn rhoi sylw i'r dadansoddiad o'r Arolwg Ymwelwyr i Lwybr Arfordir Cymru a gynhaliwyd rhwng 2011 a 2013.

Mae'r adran gyntaf, a ysgrifennwyd gan Beaufort Research, yn crynhoi canfyddiadau'r arolwg ymwelwyr (tudalennau 4 i 24). Yma edrychir ar broffil yr ymwelwyr, asesir lefelau ymwybyddiaeth o Lwybr yr Arfordir, ac ymchwilir y defnydd.

Mae'r ail adran yn disgrifio gwaith a gynhaliwyd gan yr Uned Ymchwil i Economi Cymru, Ysgol Fusnes Caerdydd, sy'n amcangyfrif effaith economaidd gwariant ymwelwyr i Lwybr Arfordir Cymru yn 2013 ar economi Cymru (tudalennau 25 i 41).

Mae crynodeb o'r prif ganfyddiadau'n dilyn:

#### **DADANSODDIAD O'R AROLWG YMWELWYR**

- Gwrywod sy'n defnyddio mwyaf ar y llwybr (56%). Ymhellach, mae proffil oedran defnyddwyr y llwybr ychydig yn hŷn na phroffil y Deyrnas Unedig. Mae bron hanner defnyddwyr y llwybr yn 65+ oed, o gymharu gyda 34% o'r boblogaeth.
- Daw mwyafrif defnyddwyr y llwybr o raddau cymdeithasol uwch ABC1 (72%) - mae hyn yn uwch na phroffil y Deyrnas Unedig (51% ABC1). Fodd bynnag, mae rhai gwahaniaethau rhanbarthol - mae defnyddwyr rhan Caerdydd - Sir Fynwy yn debycaf o fod yn perthyn i grwpiau C2DE (35%), tra bod y rhai sy'n teithio rhwng Abertawe a Bro Morgannwg yn fwyaf tebygol o berthyn i grwpiau ABC1 (76%).
- Mae'r llwybr yn denu cyfran uchel o ymwelwyr lleol; daw'r rhai o'r tu allan i Gymru o ardaloedd cyfagos Gogledd Orllewin Lloegr a Chanolbarth Lloegr, yn ogystal â choridor yr M4.
- Maint cyfartalog y grwpiau sy'n defnyddio'r llwybr yw 2.0 oedolyn a 0.3 plentyn. Mae hyn eto'n amrywio yn ôl rhanbarth, gydag adrannau Y Fflint - Ynys Môn y llwybr yn denu grwpiau mwy (2.2 oedolyn a 0.4 plentyn) ac adran Abertawe - Bro Morgannwg yn denu grwpiau llai (1.7 oedolyn, 0.2 plentyn).
- Dim ond cyfran fechan o'r grwpiau sy'n teithio ar hyd y llwybr sydd â rhywun yn eu grŵp sydd â salwch neu anabledd sy'n eu cyfyngu (12%).
- Cynyddodd ymwybyddiaeth o lwybr sengl yr arfordir yn gynyddol ar ôl ei lansio - cododd o 17% yn Ch1 2012 (cyn) i 43% yn Ch2 2012 (wedyn) ac mae wedi parhau tua'r lefel hon byth ers hynny.
- Cerdded yw'r prif ddull o ddefnyddio'r llwybr, gyda 94% yn cerdded a 4% yn beicio.
- Mae'r mwyafrif helaeth yn defnyddio'r llwybr ar gyfer dibenion hamdden (96%) gyda 58% yn teithio o'u cartrefi i gerdded y diwrnod hwnnw, a 38% arall yn defnyddio'r llwybr fel rhan o wyliau hirach.

- Mae pa mor aml y defnyddir y llwybr yn amrywio; mae dau mewn pump yn ei ddefnyddio bob dydd (19%), a bron hanner yn defnyddio'r llwybr rhwng 1 a 4 gwaith y mis (45%). Mae chwarter yn ei ddefnyddio'n anaml (25%) gan ei ddefnyddio unwaith y flwyddyn neu'n llai aml, tra ar gyfer un mewn deg o'r rhai a gyfwelwyd, hwn oedd eu hymweliad cyntaf (9%).
- Nifer cyfartalog y milltiroedd a deithir ar y llwybr mewn un cyfeiriad yw 1.8 milltir; gan amrywio o 1.7 milltir ar y rhan rhwng Sir y Fflint ac Ynys Môn, i 2.3 milltir ar hyd y rhan rhwng Sir Benfro a Sir Gaerfyrddin.
- Ar gyfartaledd, y gwariant tra maent ar y llwybr yw £3.52 y parti y diwrnod (yn gyfwerth â £1.76 yr oedolyn). Mae gwariant cyfartalog tra byddant yn yr ardal leol (heb gynnwys llety) lawer yn uwch ar £21.05 y parti y diwrnod.
- Y math o lety y soniwyd amdano amlaf ar gyfer aros dros nos yw maes gweryslla neu garafannau (41%), a chost gyfartalog llety y telir amdano yw £57.20 y noson.

## EFFAITH ECONOMAIDD GWARIANT YMWELWYR I LWYBR ARFORDIR CYMRU 2013

- Mae'r effeithiau economaidd y gellir eu priodoli i Lwybr Arfordir Cymru'n digwydd i raddau helaeth ymaith o'r Lwybr ei hunan (e.e. mae gwariant mewn siopau ac ar lety ac ati mewn trefi lleol). Edrychodd y dadansoddiad felly ar bob gwariant cysylltiedig ag ymweliad p'un ai ar, neu i ffwrdd, o'r llwybr.
- Amcangyfrifwyd y bu 2.82 miliwn ymweliad i Lwybr Arfordir Cymru rhwng mis Hydref 2012 a mis Medi 2013; roedd 2.45 miliwn o'r ymweliadau hyn gan oedolion (a ddiffinnir gan rai 16 oed neu drosodd).
- Amcangyfrifwyd fod gwariant gros gan oedolion ar yr ymweliadau hyn yn £32.3m.
- Ar ôl tynnu diferu (ar ffurf mewnforion a threthi) allan o'r gwariant uniongyrchol yma, aseswyd yr effeithiau anuniongyrchol yn defnyddio modelu Mewnbwn Allbwn; wedyn amcangyfrifwyd fod cyfanswm effeithiau economaidd gwariant ymwelwyr i'w briodoli i Lwybr Arfordir Cymru yn 2013 yn:
  - £31.7m o alw ychwanegol yn economi Cymru
  - £15.9m o werth ychwanegol crynswth, a
  - Thua 715 blwyddyn person o gyflogaeth.
- Yn y rhannau o Lwybr Ardal Cymru sy'n dod o fewn ardal y rhaglen Cydgyfeirio, amcangyfrifwyd fod cyfanswm yr effeithiau yn:
  - £23.5m o alw ychwanegol yn economi Cymru
  - £11.8m o werth ychwanegol crynswth, a
  - 535 blwyddyn person o gyflogaeth.
- Amcangyfrifwyd fod cyfanswm effeithiau gwariant ymwelwyr y tu allan i'r rhaglen Cydgyfeirio yn:
  - £8.2m o alw ychwanegol yn economi Cymru;
  - £4.1m o werth ychwanegol crynswth; a
  - 180 blwyddyn person o gyflogaeth.
- Mae gwariant ymwelwyr y medrir ei briodoli i Lwybr Arfordir Cymru yn creu effeithiau economaidd mewn gwahanol sectorau o economi Cymru, nid dim ond mewn sectorau traddodiadol twristiaeth megis llety. Yn 2013 amcangyfrifir y cefnogwyd £1.8m o werth crynswth ychwanegol yn y sector gwasanaethau ariannol yn economi Cymru fel canlyniad i wariant ymwelwyr i lwybr yr Arfordir, gyda swm tebyg yn y sector trafndiaeth a chyfathrebu.

## **The Wales Coast Path Visitor Survey 2013**

### **Executive Summary**

This report, which is split into two sections, highlights the analysis of the Wales Coast Path Visitor Survey undertaken between 2011 and 2013.

The first section, which was written by Beaufort Research, summarises the findings of the visitor survey (pages 4 to 25). Here the visitor profile is examined, awareness levels of the Coastal Path are assessed, and the usage is explored.

The second section describes work undertaken by the Welsh Economy Research Unit, Cardiff Business School, which estimates the economic impact of Wales Coast Path visitor spending in 2013 on the Welsh economy (pages 26 to 42).

A summary of the main findings follows:

#### **VISITOR SURVEY ANALYSIS**

- Path users are predominantly male (56%). Moreover, the age profile of path users is older than the profile of the UK. Nearly half of path users are aged 65+, compared to 34% of the population.
- The majority of users of the path are from the higher social grades of ABC1 (72%) – this is higher than the UK profile (51% ABC1). However, there are some regional differences – users of the Cardiff – Monmouthshire stretch are most likely to belong to the C2DE groups (35%), while those travelling between Swansea and the Vale of Glamorgan are most likely to belong to the ABC1 groups (76%).
- The path attracts a high proportion of local visitors; those from outside of Wales are drawn from the geographically close North West and Midlands, as well as the M4 corridor.
- The average size of groups using the path is 2.0 adults and 0.3 children. Again this varies by region, with Flint – Anglesey sections of the path attracting larger groups (2.2 adults and 0.4 children) and the Swansea – Vale Glamorgan section attracting smaller groups (1.7 adults, 0.2 children).
- Only a small proportion of groups traveling along the path have someone in their group who has a limiting illness or disability (12%)
- Awareness of a single coastal footpath increased significantly post-launch – it rose from 17% in Q1 2012 (pre) to 43% in Q2 2012 (post) and has remained around this level ever since.
- Walking is the predominant means of using the path, with 94% walking and 4% cycling.

- The vast majority are using the path for leisure purposes (96%), with 58% simply traveling from home for a walk that day, and another 38% using the path as part of a longer holiday.
- The frequency of using the path varies; two in five are daily users (19%), while nearly half use the path between 1 and 4 times a month (45%). A quarter are infrequent users (25%) using it once a year or less often, while for one in ten of those interviewed, this was their first visit (9%).
- The average miles travelled on the path in a single direction is 1.8 miles; ranging from 1.7 miles along the Flintshire to Anglesey stretch, to 2.3 miles along the Pembrokeshire to Carmarthenshire stretch.
- On average, spend whilst on the path is £3.52 per party per day (equating to £1.76 per adult). Average spend while in the local area (excluding accommodation) is much higher at £21.05 per party per day.
- The most commonly mentioned type of accommodation when staying overnight is a campsite or caravan (41%), and the average cost of paid accommodation is £57.20 per night.



## ECONOMIC IMPACT OF WALES COAST PATH VISITOR SPENDING 2013

- The economic impacts that are attributable to the Wales Coast Path take place largely away from the Path itself (e.g. spending occurs in shops and on accommodation etc. in local towns). The analysis therefore looked at all trip related spending whether on, or away, from the path.
- There were an estimated 2.82 million visits to the Wales Coast Path between October 2012 and September 2013; 2.45 million of these were by adults (defined as those aged 16 years or over).
- Gross expenditure by adult visitors on these trips was estimated at £32.3m.
- With leakages (in the form of imports and taxes) taken away from this direct spending the indirect impacts were assessed using Input Output modelling; the overall economic impacts of visitor spending attributable to the Wales Coast Path in 2013 were then estimated as:
  - £31.7m of additional demand in the Welsh economy
  - £15.9m of gross value added, and
  - Around 715 person-years of employment.
- In the Convergence area section of the Wales Coast Path the overall impacts were estimated as:
  - £23.5m of additional demand in the Welsh economy
  - £11.8m of gross value added, and
  - 535 person-years of employment.
- The overall Non-Convergence area visitor spending impacts were estimated as:
  - £8.2m of additional demand in the Welsh economy;
  - £4.1m of gross value added, and
  - 180 person-years of employment.
- Visitor spending attributable to the Wales Coast Path creates economic impacts throughout different sectors of the Welsh economy, not just in traditional 'tourism-facing' sectors such as accommodation. In 2013 an estimated £1.8m of gross value added was supported in the financial services sector in the Welsh economy as a result of Coast path visitor spending, and a similar amount in the transport and communications sector.

## SECTION A: VISITOR SURVEY ANALYSIS

### 1. INTRODUCTION AND OBJECTIVES

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Officially opening in May 2012, the Wales Coast Path stretches for 870 miles along the coast of Wales, from Monmouthshire in the south to Flintshire in the north. With tourism being a key component of the Welsh economy, the coastal path is an important economic asset. As part of its responsibility for managing the Wales Coast Path, Natural Resources Wales (NRW) wished to monitor and evaluate the path in the Convergence and Non-Convergence areas.

Specific objectives of the monitoring and evaluation programme were to:

- Implement the E4G monitoring and evaluation framework
- Collate monitoring and evaluation information
- Make required amendments to the monitoring and evaluation database
- Advise and design a visitor survey
- Develop algorithms to assess the impact of individual sites where visitor information is not available
- Provide an annual monitoring and evaluation report.

Beaufort Research, working in partnership with Cardiff University Business School, was awarded the contract to provide the monitoring and evaluation programme. Beaufort was responsible for the collation of primary data via a visitor survey, while Cardiff University Business School were responsible for the economic modelling of the data from the visitor survey combined with data provided directly from NRW.

The fieldwork for the visitor survey ran from October 2011 to August 2013 and the data in this report represents the results from across the period.

## 2. METHODOLOGY

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The research universe for the visitor survey was defined as those aged over 16 who were using the Wales Coast Path at any point along its 870 miles, either on foot, cycling or horse riding. Those excluded from taking part in the survey were individuals associated with the coastal path as employees of an organisation responsible for the set-up and maintenance of the path.

A total of 1,500 interviews were scheduled to be completed during the fieldwork period October 2011 to August 2013, in total 1,566 were completed.

With 87% of the path falling into Convergence areas and 13% falling in Non-Convergence areas, the sampling framework for the visitor survey was set to represent this split as well as to mirror the diversity of the path in terms of:

- Rural/urban locations
- Local authorities
- Existing/new/improved stretches of path
- Busy/quiet periods (e.g. weekends/weekdays, in season/out of season).

A total of 56 interview sites across the Wales Coast Path were used for the research and these were chosen as a result of recommendations from NRW, by the individual local authorities, and by Beaufort Research. Interviewers assigned to the project were chosen for their ability to reach the sites (some are remote) and their capacity to read maps (an essential part of the survey, as marking the path users' journey was required). Interviewers were given a comprehensive briefing on the Wales Coast Path and a detailed map to reach their exact point of interview on the path itself. Risk analysis was conducted at every site in order to ensure the safety and security of the interviewer(s) at all times.

The sites used in the research are as follows:

<p><b>FLINTSHIRE</b> Talacre Beach Greenfield Dock Flint Foreshore</p> <p><b>DENBIGHSHIRE</b> Rhyl (nr TIC) Prestatyn (nr Nova Centre)</p> <p><b>CONWY</b> Kinmel Bay Little Orme West Shore Llandudno Penmaenmawr Jubilee Path, Penmaenmawr Morfa Madryn</p> <p><b>ANGLESEY</b> South Stack Moelfre Beaumaris</p> <p><b>GWYNEDD</b> Plas Glyn y Wedw Porth Oer Tal y Bont Pont Coronation Treborth Botanical Gardens</p>	<p><b>CEREDIGION</b> Aberporth Constitution Hill Penbryn Bird Rock nr New Quay Llanon Cardigan Cwm Tydu</p> <p><b>PEMBROKESHIRE</b> Manorbier Solva Dram Dinas Newgale</p> <p><b>CARMARTHENSHIRE</b> Pendine Village Laughne Town Kidwelly Pembrey Mill Path</p> <p><b>SWANSEA</b> Langland Bay Caswell Bay Rhossili Hills Burrows Southgate</p>	<p><b>NEATH PORT TALBOT</b> Aberavon sea front The Quays, Baglan</p> <p><b>BRIDGEND</b> Locks Common, Porthcawl Trecco Bay</p> <p><b>VALE OF GLAMORGAN</b> Lavernock Point Porthkerry Country Park Cwm Colhuw, Llantwit Major Dunraven, Southerndown Ogmore</p> <p><b>CARDIFF</b> Cardiff Bay Norweigan Church Parc Tredelerch</p> <p><b>NEWPORT</b> Goldcliffe Point St Brides lighthouse Newport Wetlands</p> <p><b>MONMOUTH</b> Black Rock Chepstow</p>
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A short questionnaire was administered in either English or Welsh (at the choice of the respondent). In total, 24 of the respondents (2%) chose to take part in a Welsh language interview. The questionnaire was designed to collect profiling information of the path user as well as information about the length of trip along the path, and spend on the day.

Completed questionnaires were returned to Beaufort for quality checking and data entry. At the analysis stage the data was weighted back to reflect the Convergence/Non-Convergence universe of the coastal path.

The data was analysed by key cross groups, including social demographic groupings. These are based on the occupation of the Head of Household (i.e. the chief income earner within the household). The following definition outlines the groupings used and the types of occupation included in each:

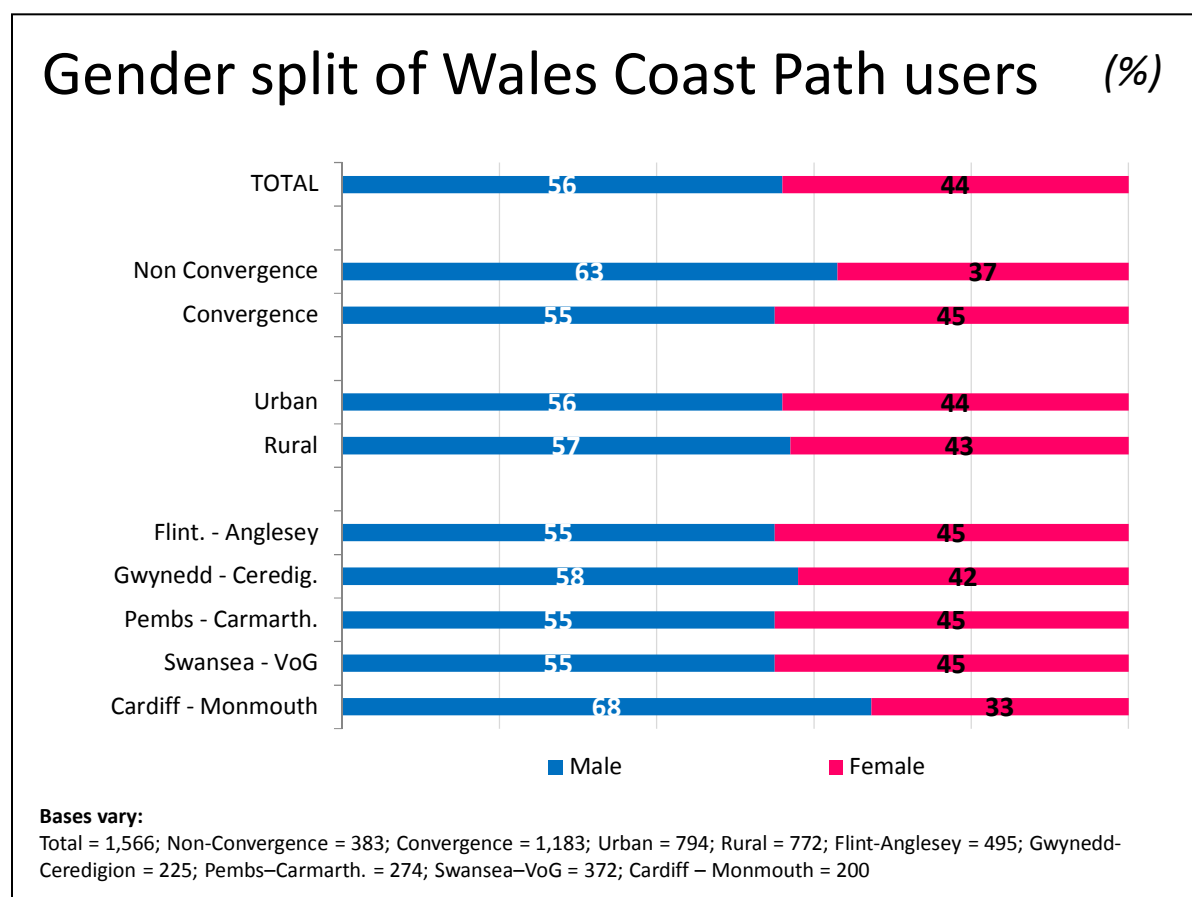
- AB** Professionals, senior managers, middle management of large organisation, top management of small businesses.
- C1** Junior management, owners of small establishments and all other non-manual positions.
- C2** Skilled manual workers, manual workers with responsibility for other people.
- DE** Semi-skilled and unskilled manual workers, apprentices and trainees to skilled workers, those dependent on state benefits, casual workers and those without regular income.

### 3. MAIN FINDINGS FROM THE VISITOR SURVEY

#### 3.1 PROFILING WALES COAST PATH USERS

With 49% of the adult population in the UK male (source: 2011 Census), the chart below suggests a skew towards males using the Wales Coast Path. Nearly three in five users are male (56%), with an even greater proportion observed along the Cardiff to Monmouth stretch of path, where males account for 68% of all users – see Figure 1.

Figure 1

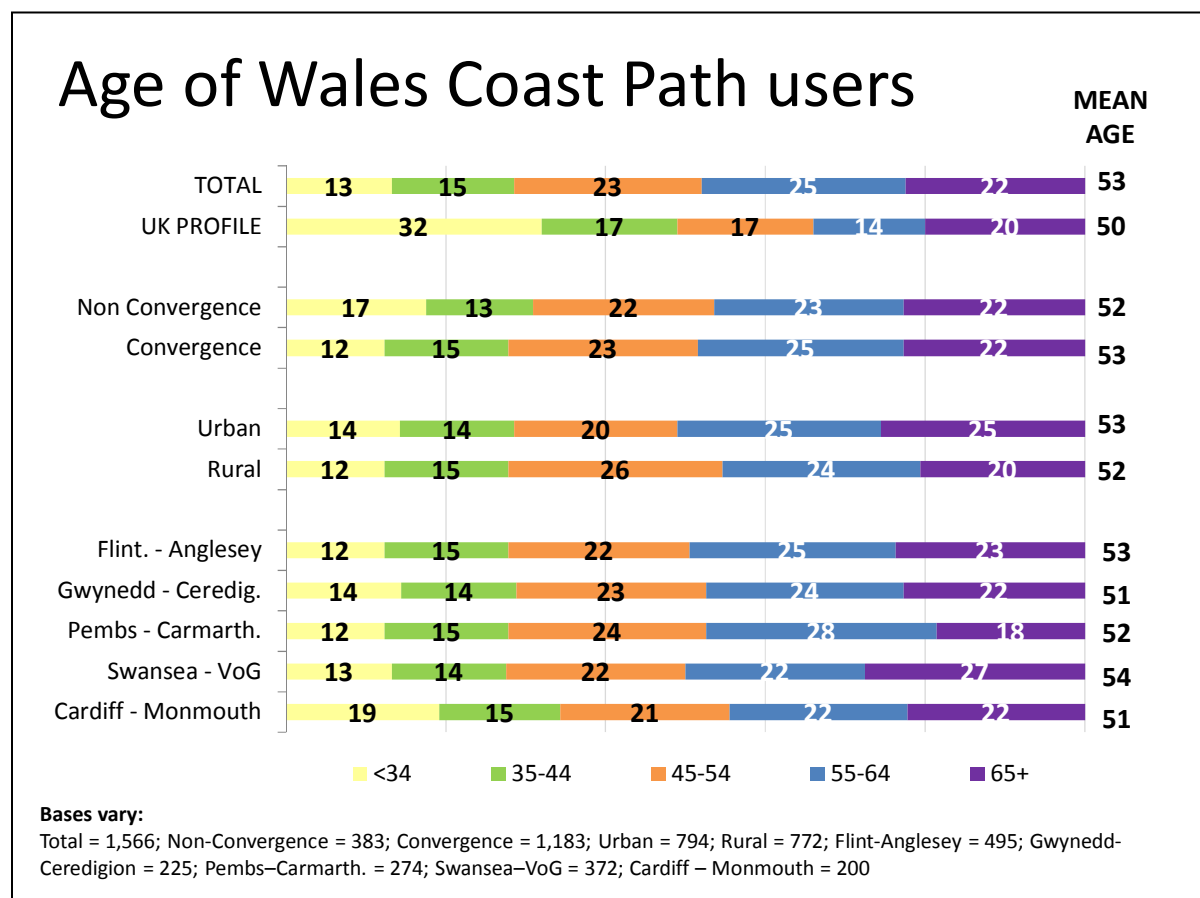


Looking at the gender split of path users in more detail, there is a more equal balance between the genders for people aged under 34 (54% male vs. 46% female). However, older users aged 65+ have a greater proportion of males (63%) than females (37%).

The mean age of path users is 53 years. The age profile of path users is older than the profile of the UK (source: 2011 Census). While 34% of the UK population is aged over 55 years, people from this aged group account for nearly half (47%) of path users.

Younger people aged 34 or under account for only 13% of users (compared to 32% of the population). However, there are younger people using the path in the Cardiff – Monmouthshire section (19%) and in non-convergence areas (17%) – see Figure 2 below.

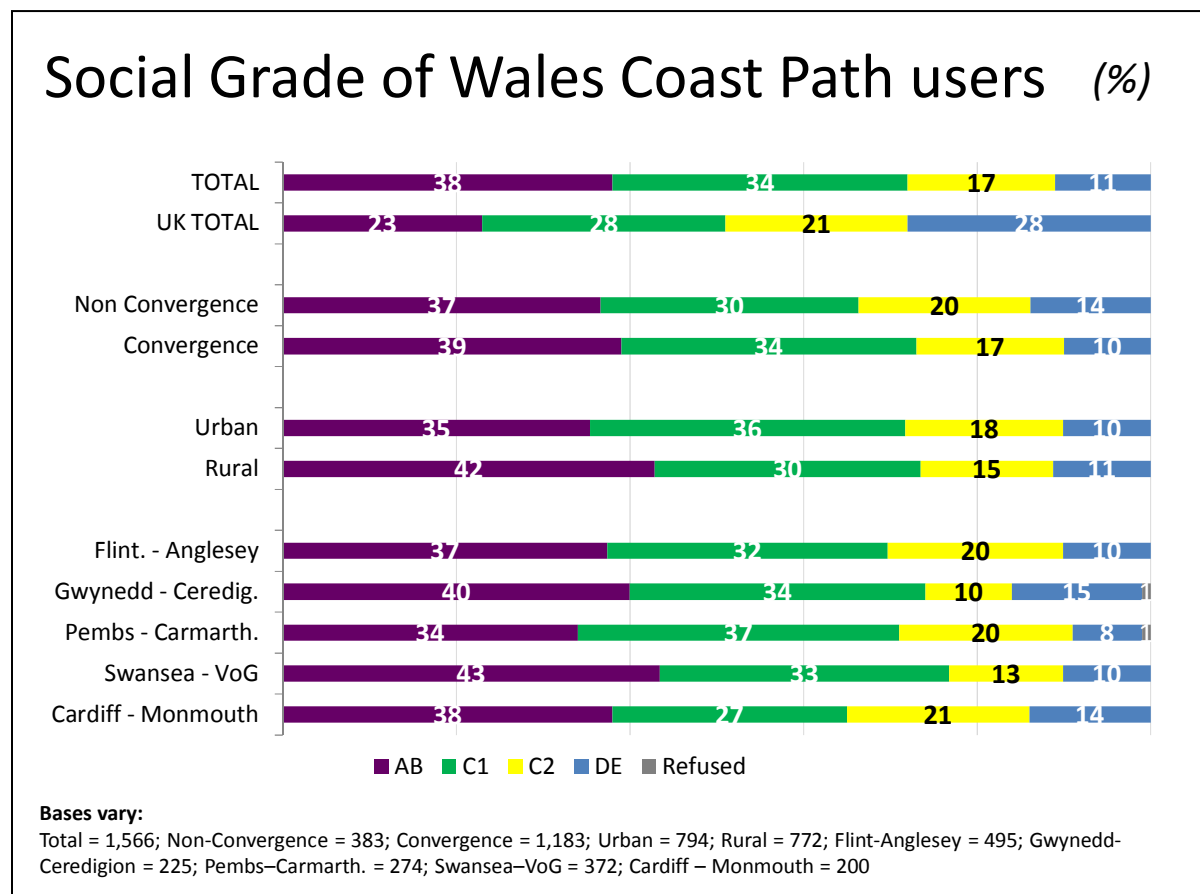
Figure 2



Looking at the social grade of path users, Figure 3 shows the profile was skewed towards the AB demographic, which accounts for 38% of users overall. This compares to the UK profile of 23% (based on figures from the Market Research Society).

Overall, AB groups account for 42% of path users in rural locations, but 35% in urban locations. Differences are observed across different sections of the path; Cardiff – Monmouthshire attracts more C2DE users (35%) compared to other regions, whereas Cardiff – Vale of Glamorgan attracts more ABC1 users (76%).

Figure 3



Ethnicity was captured in the survey and shows that the vast majority (98%) of path users classify themselves as white. There is little difference between the regions and other subgroups.



The map shown in Figure 4 illustrates the origin of users of the Wales Coast Path. This demonstrates that the path clearly attracts a high proportion of local visitors, with visitor origins clustered close to the coastal areas of Wales itself.

Figure 4: Origin of Wales Coast Path Users

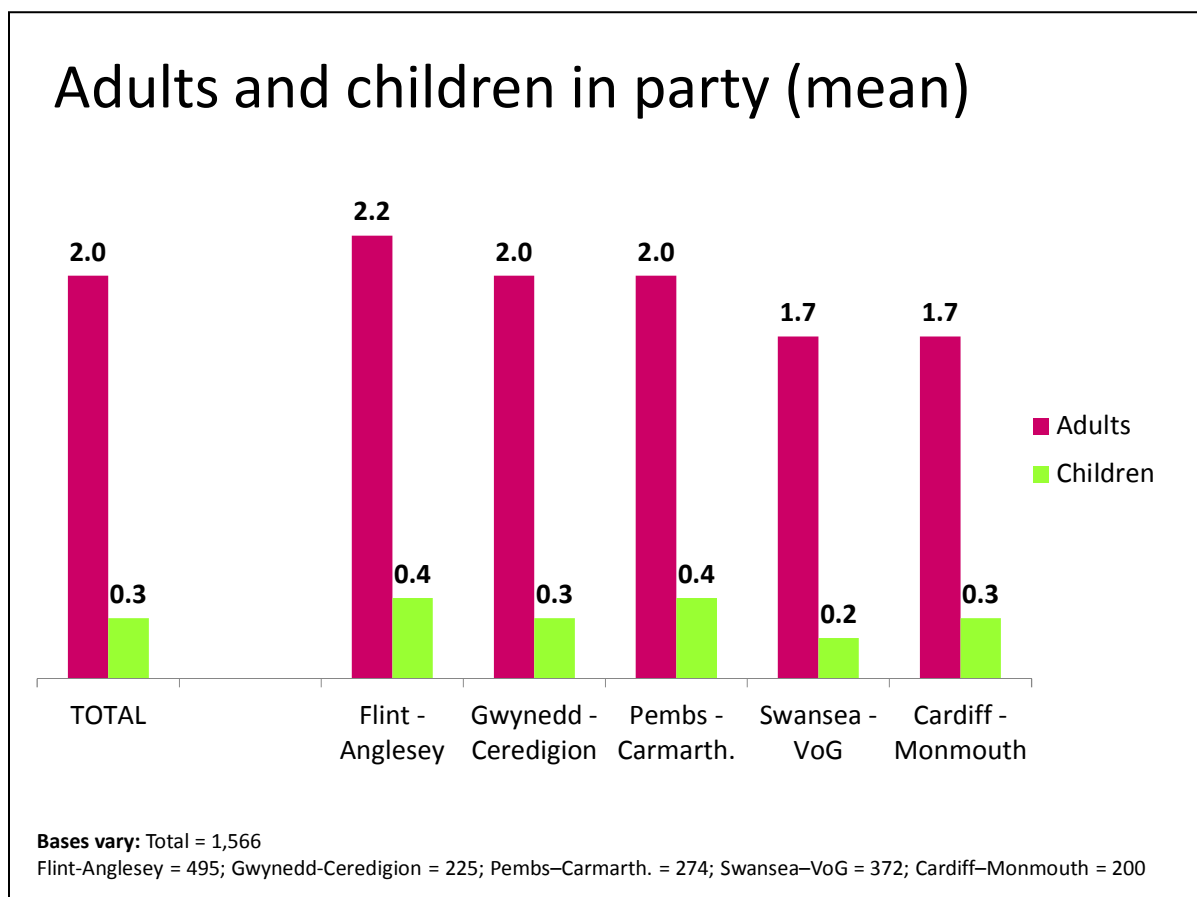


From within England, high concentrations of path users come from the North East, Midlands and along the M4 corridor.

Turning now to look at the party of users as a whole, Figure 5 below shows the mean number of adults and children travelling along the path on the day of the interview.

The average size of the immediate party using the path is 2.0 adults and 0.3 children. Looking from a regional perspective, the stretches of path between Flintshire and Anglesey attracts the largest mean party size of 2.2 adults and 0.4 children, while the stretch between Swansea and the Vale of Glamorgan attracts a smaller average party size of 1.7 adults and 0.2 children.

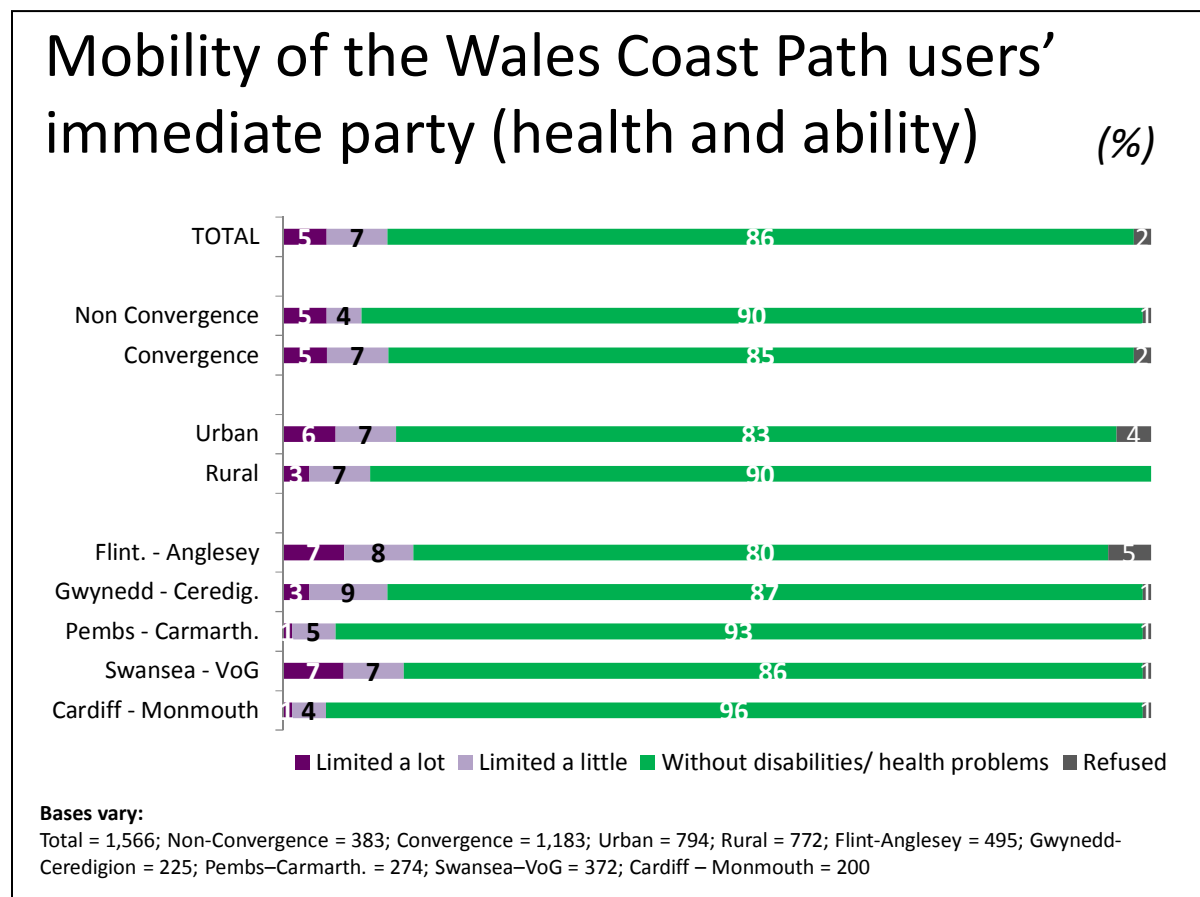
Figure 5



The physical ability of those on the path was also recorded, with the results shown in below in Figure 6.

The majority of those using the Wales Coast Path (86%) do not have anyone in their party who is limited by a disability or a health problem. Just 7% of parties have someone who is limited a little, and a further 5% have someone in their party whose ability is limited a lot.

Figure 6



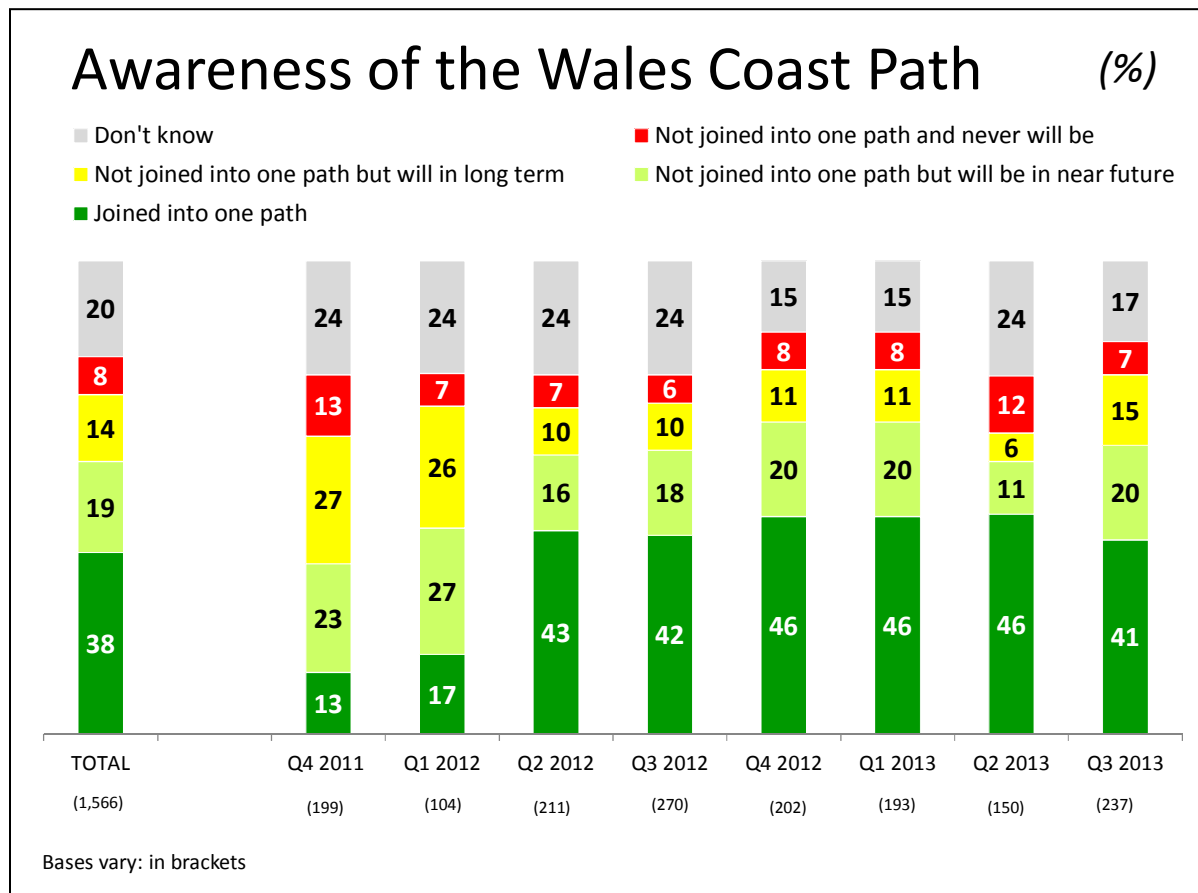
Looking at the data by the type of footpath, there is very little difference in the proportions of visitors who have a member of their party with a disability. One in ten (12%) of those on a stretch of unchanged footpath have someone in their party whose ability is limited, compared to 9% on a new stretch of footpath and 14% on an improved stretch of footpath.

### 3.2 AWARENESS OF THE WALES COASTAL PATH

The Wales Coast Path was officially opened in May 2012 and fieldwork for the monitoring and evaluation survey took place both before and after this period. Figure 7 shows the overall awareness of the path, as well as breaking it down by the period of interviewing. Quarter 4 2011 and Quarter 1 2012 were pre-opening, while Quarter 2 in 2012 onwards represents post-opening.

The chart shows the impact of the launch itself, with the proportion (incorrectly) believing the path was a single joined path rising from 13% in Q4 2011 and 17% in Q1 2012 to (correctly) 43% in Q2 2012. In Q4 2012, the awareness of the path being joined up reached a peak of 46%, but in the final quarter of the research period (Q3 2013) this fell by 5% to 41%.

Figure 7



Overall awareness (joined or not joined) remained fairly consistent up until Q3 2012, and then rose to its highest level of 85% in Q4 2012 and Q1 2013. Awareness then fell to its lowest level of 75% in Q2 2013, recovering to 83% in Q3 2013.

Overall, path users who are staying overnight have a greater level of awareness of the path being joined than those who are just visiting for the day (44% compared to 35%). In addition, 43% of users within the AB social group know the path is joined, compared to 27% of those within the C2 social group.

The survey also asked whether respondents believed the stretch of path they were on at the point of interview was *unchanged*, *improved* or a *new* section of path. The results are shown below in Table 1 against the location of the interview itself. The correct identifications are shown in a green bold font.

**Table 1: Respondents' classification of path type**

	<b>Total (1,566)</b>	Footpath type (location of interview)		
		Unchanged (974)	Improved (297)	New (295)
An unchanged existing section of path	<b>44%</b>	<b>44%</b>	37%	48%
An improved section of path	<b>33%</b>	33%	<b>45%</b>	24%
A new section of path	<b>5%</b>	4%	8%	<b>3%</b>
Don't know	<b>18%</b>	18%	9%	24%

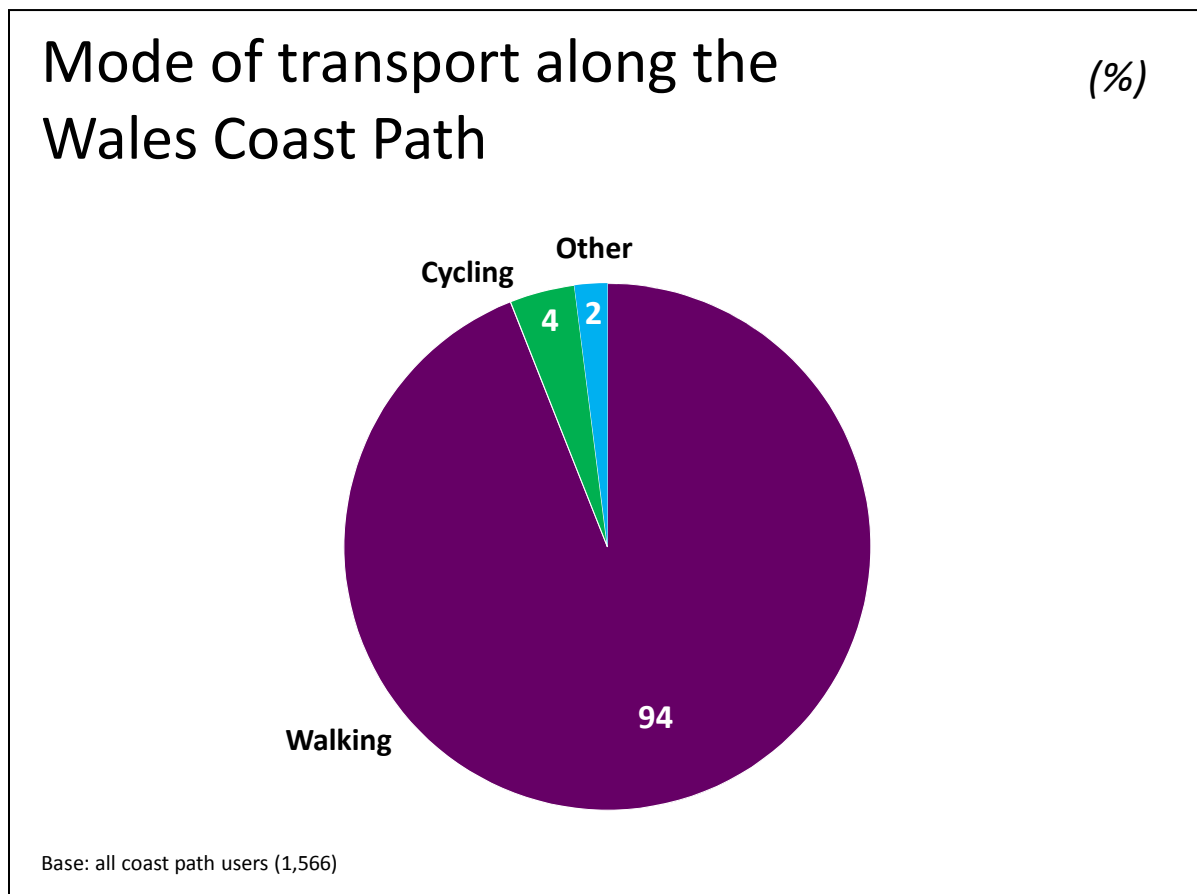
Bases in brackets

The results show that while over two in five of the path users on either *unchanged* and *improved* sections of path correctly identify the nature of the path, just 3% of those on a *new* stretch of path identify it as such. Almost half (48%) of those on a new stretch of path believe it to be unchanged, with around a quarter thinking the section is improved, or simply not knowing (24% for each).

### 3.3 USING THE WALES COAST PATH

The vast majority of those on the Wales Coast Path are walking (94%). A small proportion of users were cycling along the path (4%), with the remaining 2% using another form of transport such as a motorbike, quad bike or assisted/disability vehicle – see Figure 8.

Figure 8

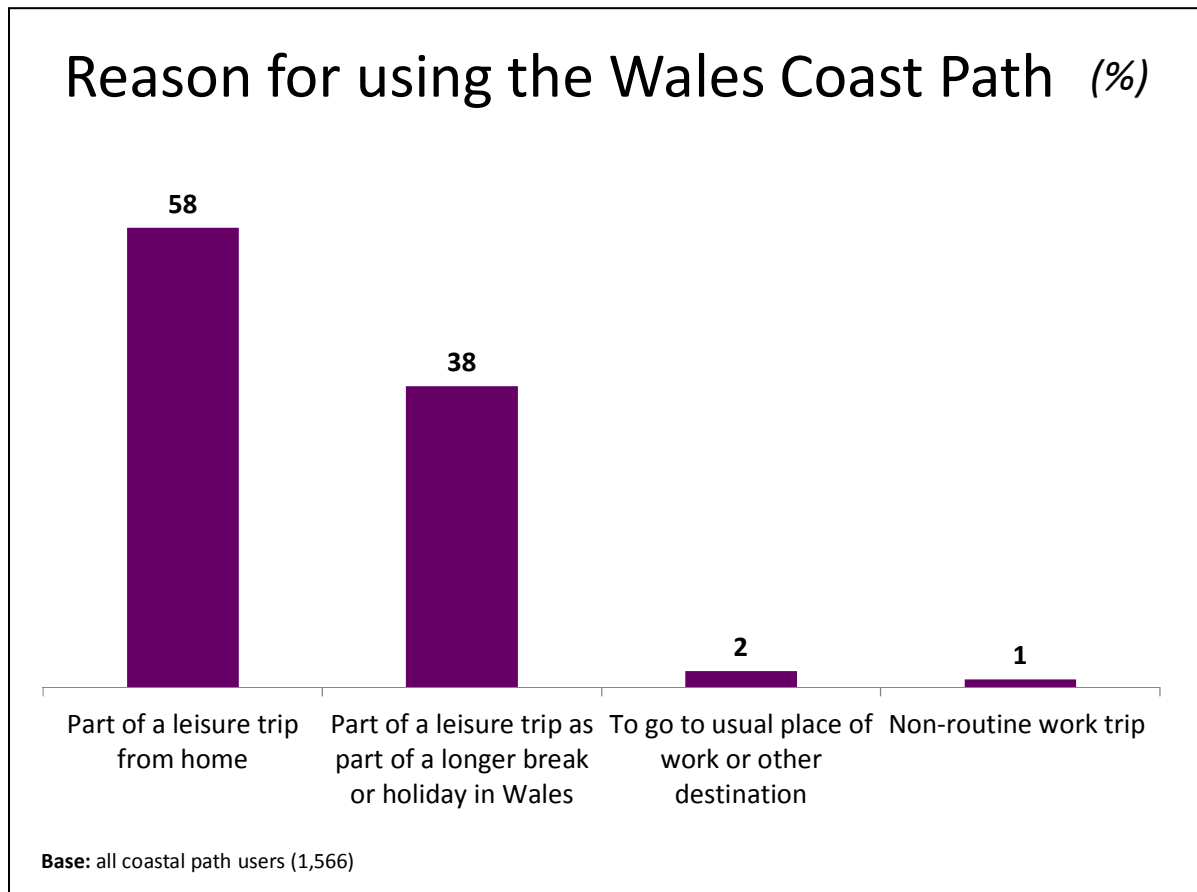


Not surprisingly, cycling is more prevalent along urban stretches of the path than the rural stretches of the path (7% compared to 1%).

Looking at the reason for using the path on the day of interview, the most-mentioned reason is as part of a leisure trip from home, accounting for 58% of the people using the path - see Figure 9.

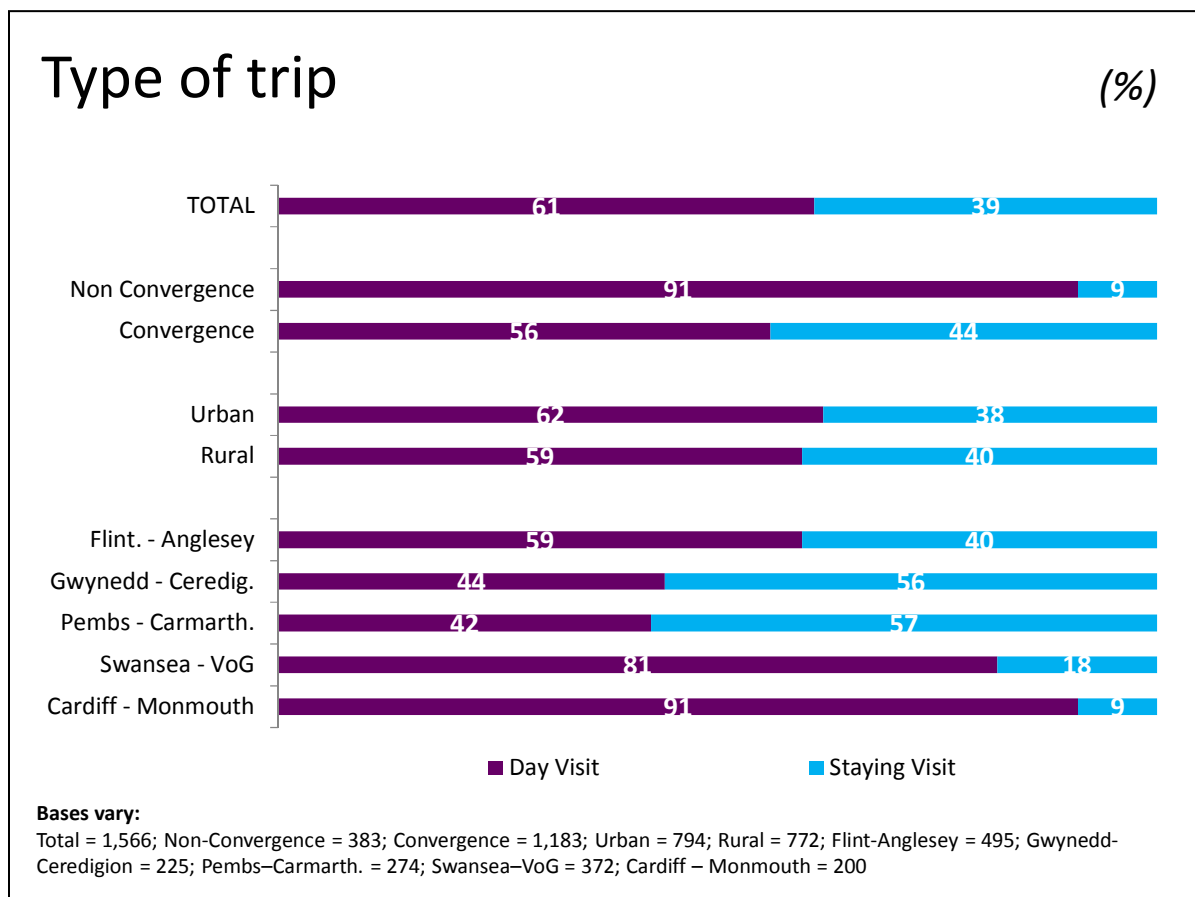
A further 38% were on a leisure trip as part of a longer break or holiday in Wales, and just 3% were there due to work. Those on stretches of the path between Pembrokeshire and Carmarthenshire were most likely to be visiting as a leisure trip as part of a longer break or holiday in Wales (57%), while only 8% of users between Cardiff and Monmouthshire are holiday makers.

**Figure 9**



Over three in five (61%) of those using the path are day visitors as opposed to overnight visitors (39%). Large differences are observed between the Convergence and Non-Convergence areas, with 91% of those in Non-Convergence areas being day visitors, compared to 56% who are on parts of the path in Convergence areas. Figure 10, displayed overleaf, shows the breakdown of those on a day trip compared to those on a staying trip in Wales.

Figure 10



The chart also demonstrates a very different profile of path users along the Cardiff to Monmouth stretch, with just 9% visiting as part of an overnight trip, compared to 57% of using the path between Pembrokeshire and Carmarthenshire.

When respondents were asked what they would have done if they had not been able to access that particular stretch of the Wales Coast Path the results showed the majority would have sought an alternative route (see Table 2 below).



**Table 2: Alternative action if section of the Wales Coast Path had not been available**

	Total	Region				
		Flint. - Anglesey	Gwynedd – Ceredig.	Pembs. – Carmarth.	Swansea - VoG	Cardiff – Monmouth.
Walked/cycled/horse ride by another route elsewhere	<b>69</b>	62	70	77	75	60
Undertaken the journey by car/van/bus/train etc.	<b>11</b>	17	5	9	7	10
Not made the journey or gone walking/cycling/horse riding at all	<b>8</b>	8	8	9	8	12
Other	<b>7</b>	9	8	3	5	13
Don't know / Not answered	<b>4</b>	5	10	1	4	6

**Bases vary:** Total = 1,566; Flint-Anglesey = 495; Gwynedd-Ceredigion = 225; Pembs–Carmarth. = 274; Swansea–VoG = 372; Cardiff – Monmouth = 200

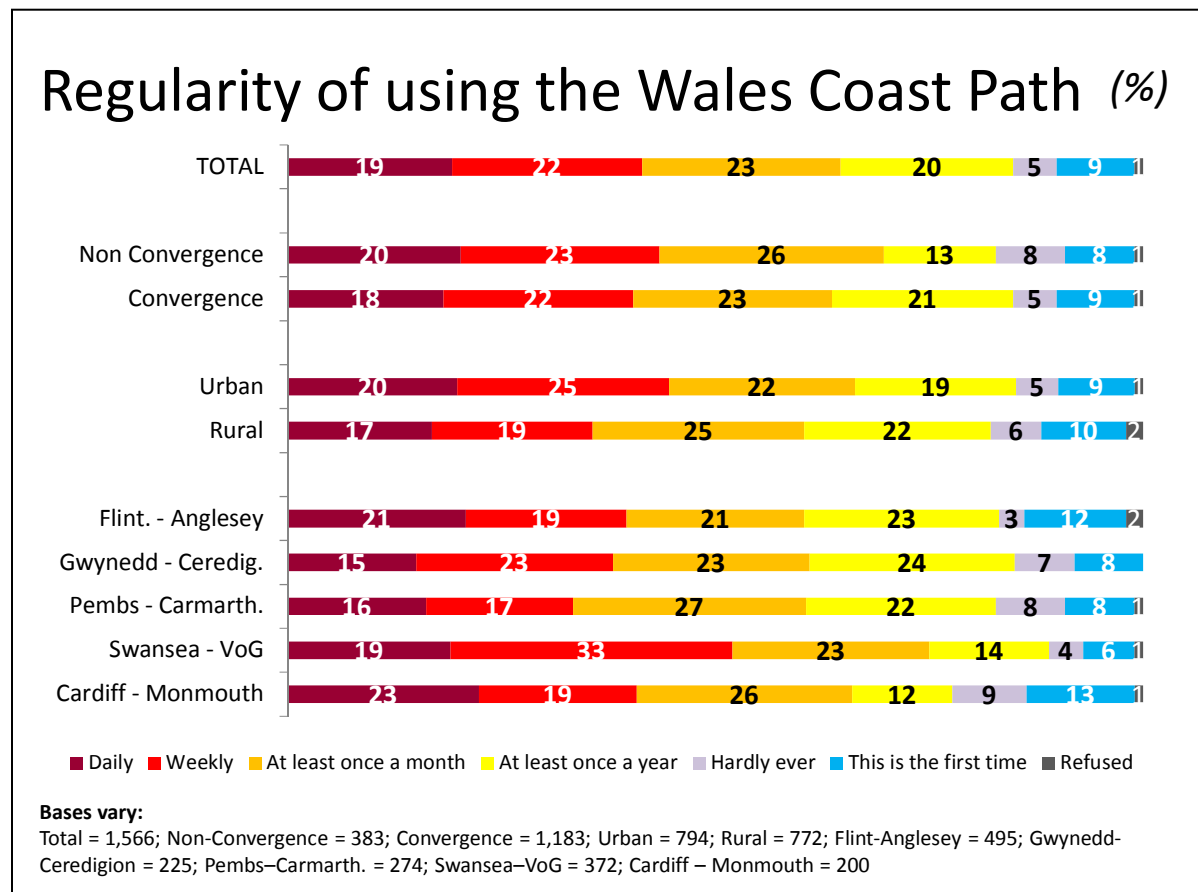
Table 2 shows that over two thirds (69%) of the Wales Coast Path users would have found an alternative route on which to walk or ride along. However, an even greater proportion of those on the path between Pembrokeshire and Carmarthenshire expressed that this would have been the case for them (77%).

Just over one in ten (11%) of all users would have switched to using vehicular transport, with the highest proportions for this option found along the Flintshire to Anglesey stretch of the path (17%), and lowest on the Gwynedd to Ceredigion stretch (5%).

Overall, less than one in ten (8%) of all path users claimed they would have not made the journey or gone walking/riding at all. However, this was found to be slightly higher along the Cardiff to Monmouth stretch of the path where the proportion saying this was 12%.

Looking at the regularity of the Wales Coast Path use, 19% explained they use the path daily, rising to 20% in urban locations and Non-Convergence areas. Figure 11 shows this, along with a breakdown according to the different stretches of the path.

Figure 11



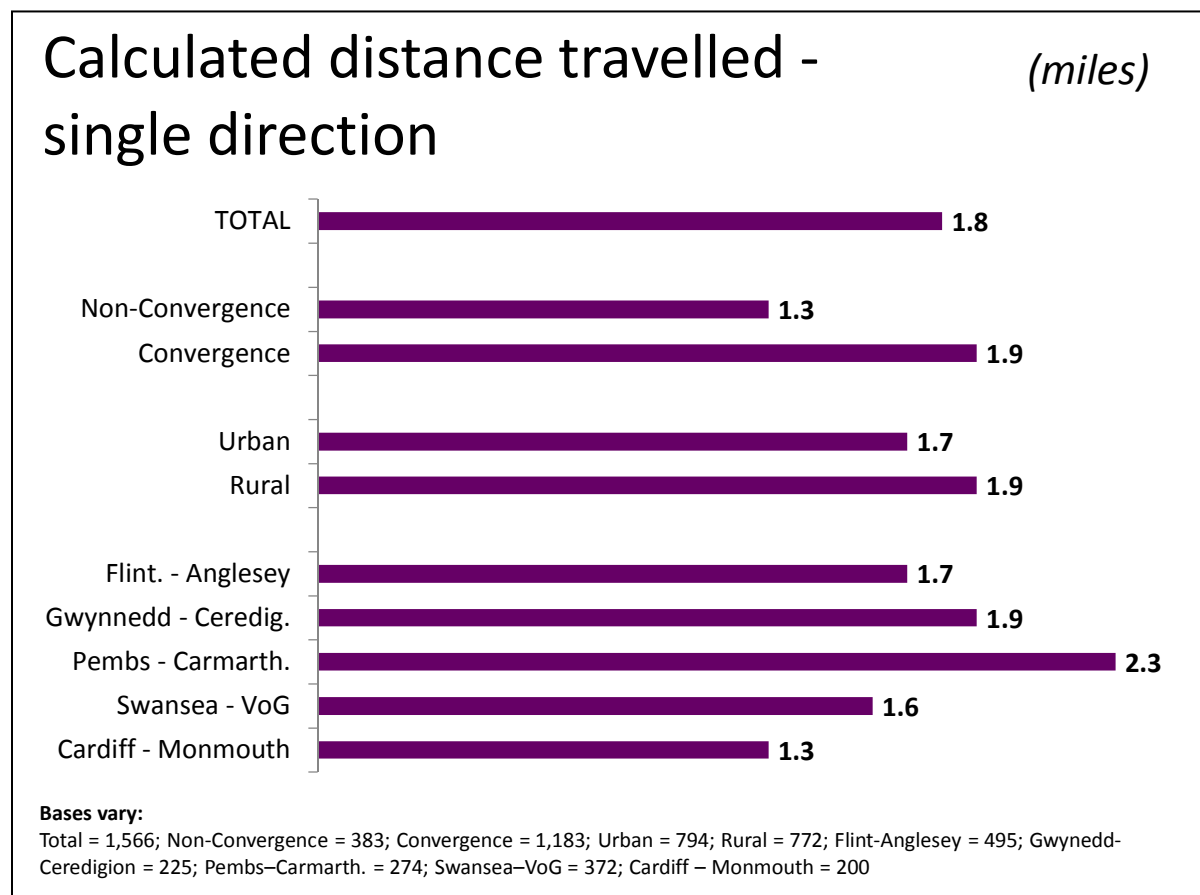
First-time users on the Wales Coast Path were in their highest proportions along the Cardiff to Monmouth stretch of path, with 13% having never travelled along the path previously. In contrast, only 6% of those who were along the path between Swansea and the Vale of Glamorgan were first time visitors.

The questionnaire contained a detailed map of the area surrounding the interview site with the route of the Wales Coast Path highlighted in red. Respondents were asked to mark up the journey they were taking that day along the path. The distance of the area travelled was then calculated at Beaufort Research when the questionnaires were returned to the office. The distance recorded represents the miles covered in one direction and does not

include a return journey on the same stretch of path. It is therefore not representative of the entire length of the journey travelled by path users on the day of the interview, but instead captures the stretch of the path the respondent had been exposed to on that day.

As shown in Figure 12, the average stretch of path covered by visitors is 1.8 miles. This varied according to area, with an average of 1.3 miles in Non-Convergence areas and 1.9 in Convergence Areas. The region with the highest mileage covered is the Pembrokeshire to Carmarthenshire stretch, with an average of 2.3 miles, compared to the average of 1.3 miles travelled between Cardiff and Monmouth.

**Figure 12**

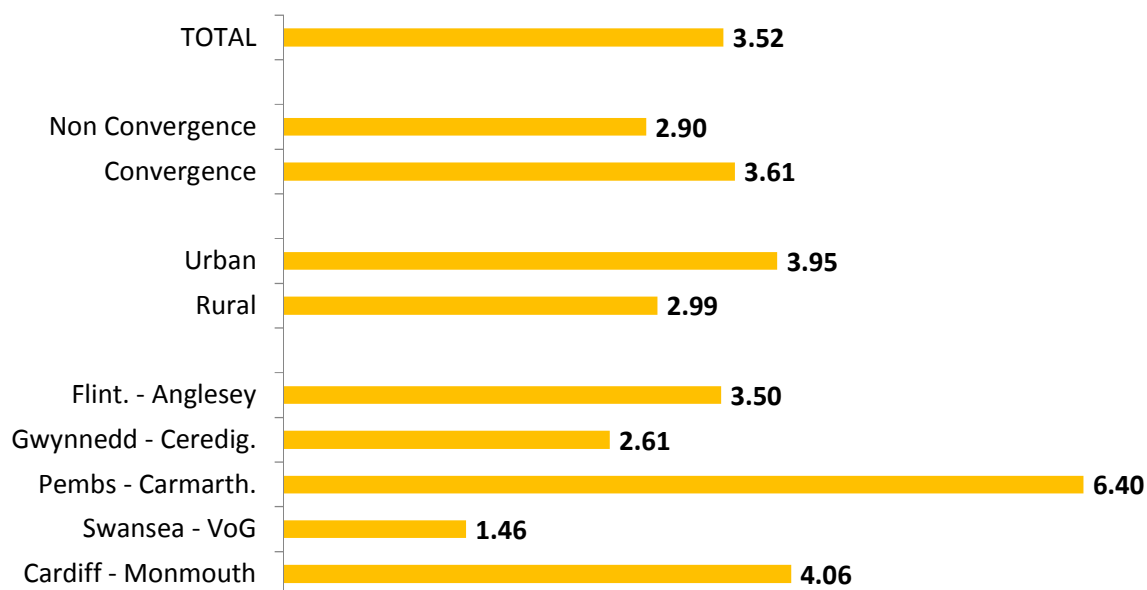


As would be expected, those who are cycling travel a longer average distance (5.2 miles) compared to those who are walking along the Wales Coast Path (1.6 miles). Age is also a factor in the average length travelled, with those aged over 65 travelling the lowest average distance of 1.4 miles compared to the average of 2.0 miles travelled by the 35 to 44, and 55 to 64 age groups. Respondents' estimations of how far they have travelled along the path are usual over-estimations – the average estimated distance travelled is 2.7 mile – over a mile longer than is actually travelled.

The survey recorded how much the respondent and their *immediate party* spent while travelling on the Wales Coast Path, with the mean values shown below in Figure 13. On average, spend stands at £3.52 per immediate party which, with a mean party size of 2.0 adults, results in an average spend of £1.76 per adult. The mean spend varies considerably by the region in which the path falls, with an average spend of £6.40 along the Pembrokeshire to Carmarthenshire stretch compared to £1.46 along the Swansea to the Vale of Glamorgan stretch.

**Figure 13**

## Spend while on the Wales Coast Path (£) by immediate party



**Bases vary:**

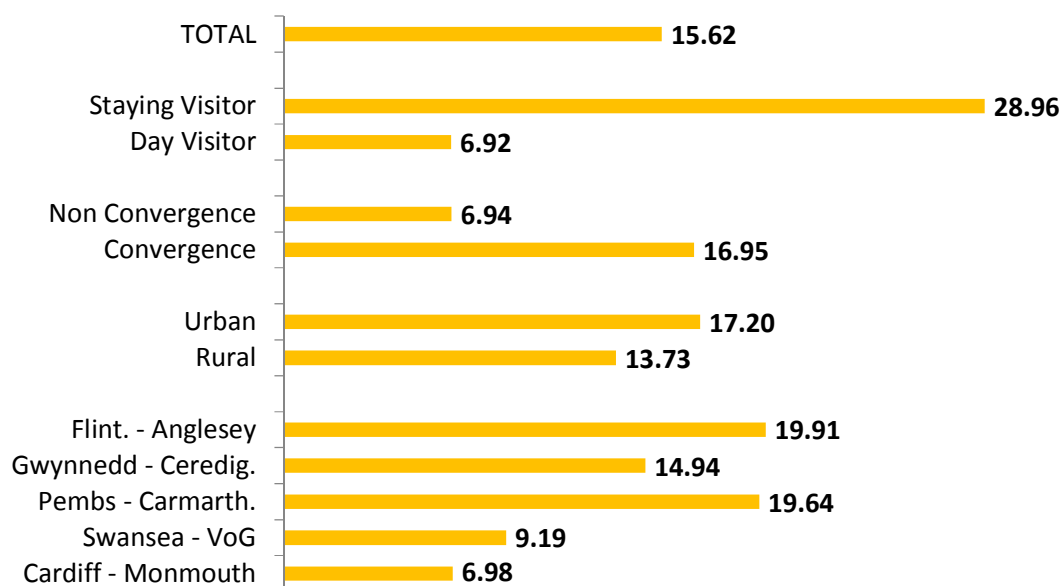
Total = 1,566; Non-Convergence = 383; Convergence = 1,183; Urban = 794; Rural = 772; Flint-Anglesey = 495; Gwynedd-Ceredigion = 225; Pembs-Carmarth. = 274; Swansea-VoG = 372; Cardiff - Monmouth = 200

Mean spend on urban stretches of the Wales Coast Path is higher than spend along rural stretches of the Wales Coast Path (£3.95 compared to £2.99). However, mean spend in Convergence areas is higher compared to mean spend in Non-Convergence areas (£3.61 compared to £2.90).

The survey also asked the respondent to provide their total daily spend for themselves and their immediate party, including spend along the route as well as fuel costs to and from the path, parking, food, drink and souvenirs (but excluding accommodation). The results are shown below in Figure 14. The daily mean spend is £15.62, with those visitors on the path between Flint and Anglesey (£19.91) and Pembrokeshire – Carmarthen (£19.64) spending the most. Those using the path between Cardiff and Monmouth spend the least (£6.98).

**Figure 14**

## Daily spend by immediate party - (£) excluding accommodation



**Bases vary:**

Total = 1,566; Non-Convergence = 383; Convergence = 1,183; Urban = 794; Rural = 772; Flint-Anglesey = 495; Gwynedd-Ceredigion = 225; Pembs-Carmarth. = 274; Swansea-VoG = 372; Cardiff - Monmouth = 200

Overall, spend is considerably higher in Convergence areas, with a mean of £23.21, compared to £6.94 in Non-Convergence areas. In addition, spend varies according to whether visitors are only in the area for the day or if they were staying longer, with day visitors spending an average of £15.89, compared to staying visitors who spent an average £28.96.

Spend levels are also linked to social class; those in AB socio economic grades spend an average of £31.76 per day, compared to those in the DE social grade who spent an average of £8.70. Differences in spend are also observed depending on the age of the respondent, with those over the age of 65 spending the most (£33.77), and those under the age 34 spending the least (£12.88).

Amongst those who were on a trip staying overnight in Wales (39% of path users overall), the average number of nights stayed was six. Those visitors over the age of 65 are more

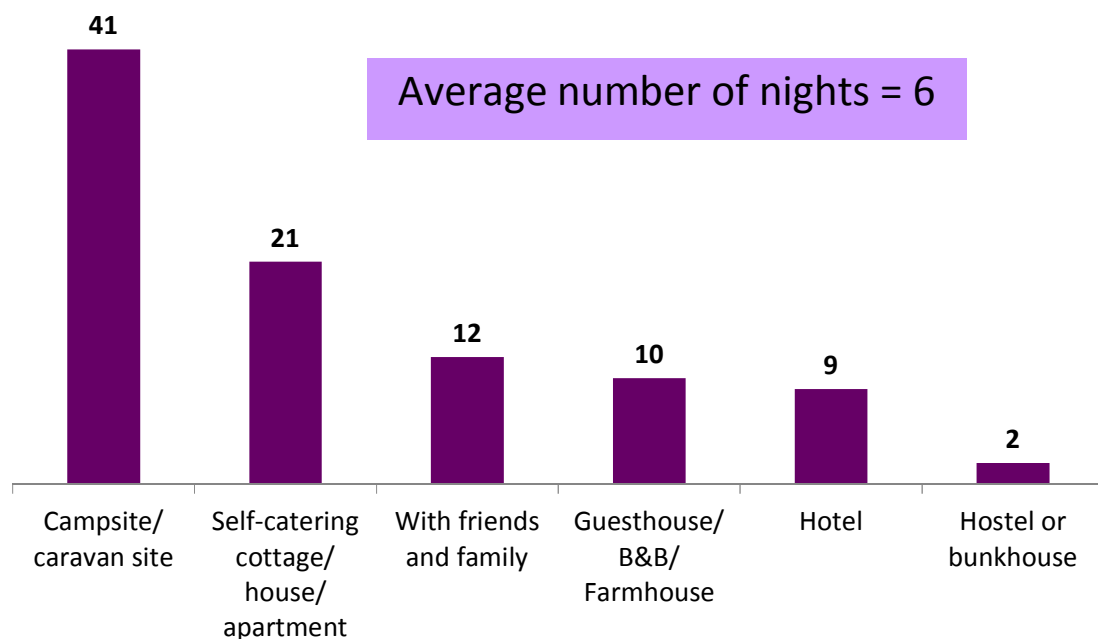
likely to be staying for a longer period (8 nights on average), while those aged 34 and under stay 4 nights, on average.

Amongst those staying overnight in Wales, the most popular type of accommodation is *campsite/caravan site*; just over two in five (41%) mention this category. This was followed by *self-catering cottage/house* (21%) and *with friends and relatives* (12%). Figure 15 also shows that just 2% of those using the path stay in a *hostel or bunkhouse* and less than one in ten (9%) stay in a *hotel*.

### Figure 15

## Type of accommodation used

(%)



Base: all coastal path users staying overnight in Wales to use Coast Path (549)

Users of the path who were staying overnight in paid accommodation spend £57.20 on their accommodation per day. However, visitors along urban stretches of the path generally spend more; with their average spend equating to £62.93 compared to £49.61 for those visiting rural sections.



## **SECTION B: ECONOMIC IMPACT**

### **The Economic Impact of Wales Coast Path Visitor Spending on Wales 2013**

#### **1. Introduction**

In this section of the report estimates are given of the economic value generated by the spending of visitors to the Wales Coast Path over a one year period, from October 2012 to September 2013. The economic impact is reported in terms of output, gross value added and employment arising directly, and indirectly, through the spending in Wales of visitors to the Path.

In order to estimate the impact of visitor direct spending the Welsh Economy Research Unit's *Welsh Input-Output Tables* were utilised.

Input-Output tables provide a detailed financial account of trading between different parts of the economy during one year. This includes trade between industries within the economy, external trade through imports and exports, as well as consumer and government spending. The Input Output framework then enables the effect of any spending or activity to be traced through the various supply chains, ultimately estimating indirect and induced-income effects.

## **2. Sources of economic impact**

The Wales Coast Path is in part an 'enabling' feature which gains access to other tourism sites, so deriving an economic impact for the Path alone presents distinct challenges. Visitor economic impacts largely arise away from the destination (e.g. a relatively high proportion of their spending takes place in shops and hotels in nearby towns, not on the Path itself).

These added complexities in measuring the economic impact make it difficult for tourism locations such as the Path to match up against traditional public sector interventions, and win continued support. Despite this there is a need generated by funding requirements to evaluate the economic value of the Path (e.g. to WEFO for the Convergence Area sections) and highlight its benefits. With this in mind, the results in the following research are reported in terms of Convergence and Non-Convergence areas of the Wales Coast Path.

The main research objective of this Cardiff Business School work is to estimate the economic impacts for Wales of visitor spending related to the Wales Coast Path. Given the above comments about the economic impacts arising away from the tourism destination, this report will talk to the Path's role in terms of contributing to overall impact.

This work follows an interim study on the economic impact of Wales Coast Path visitor spending undertaken in 2012. This earlier study enabled the methodology and data to be fully tested. The 2013 iteration benefited from additional data captured through the visitor questionnaires on overnight paid accommodation. This enabled a more accurate estimation of this component of visitor spending to be generated.

### **3. Method**

#### **3.1 Direct and Indirect Economic Impacts**

Evaluating the overall economic impacts of visitor spending attributable to the Wales Coast Path requires an assessment of both the direct and indirect effects. Direct economic impacts arise through visitor purchases of food and drink, nights in paid accommodation and travel costs etc.

These direct expenditures support economic activity in Wales indirectly: in order to meet spending by visitors, outputs are required from other Welsh industries. For example, when visitors stay in local B&B's/Guesthouses, purchases are made by the accommodation providers from local farms or wholesalers to provide breakfasts. This regional sourcing then in turn leads to further regional spending by the local farms, and so on. The extent of these supplier effects then depends on the level of Welsh sourcing for the particular sector and on levels of regional sourcing by its suppliers.

Additionally, visitor spending adds to local incomes, a large part of which will likely be spent in the region, further adding to local incomes. These induced-income effects can be added to supplier effects to form the total indirect consequences of the direct local economic activities.

### 3.2 Economic Impact Measurement Indicators

Economic impacts, levered by visitors to the Wales Coast Path, can be expressed in terms of spending, incomes and jobs, or in economic terms - Output, Gross Value Added and Employment (see Table 1).

**Table 1: Economic Impact Indicators**

<b><i>Economic Measure</i></b>	<b><i>Description</i></b>
Output	<i>The value of the goods and services produced in the local economy as a result of the increase in visitor expenditure due to the Wales Coast Path.</i>
Gross Value Added (GVA)	<i>Locally earned incomes, profits.</i>
Employment	<i>The number of Full-Time Equivalent (FTE) jobs supported by spending associated with the Wales Coast Path.</i>

To estimate the indirect economic impacts it is necessary to have a model of the Welsh economy which shows how different types of consumption spending create supplier and induced-income effects across different sectors of the Welsh economy. The Input-Output tables for Wales provide such a framework.

### 3.3 Input-Output Tables

The most recent Input Output Tables for Wales (for 2007) were produced by the Welsh Economy Research Unit with support from the Environment Agency Wales (July 2010). For more details please visit:

[http://business.cf.ac.uk/sites/default/files/IO\\_2007\\_Final\\_30\\_6.pdf](http://business.cf.ac.uk/sites/default/files/IO_2007_Final_30_6.pdf)

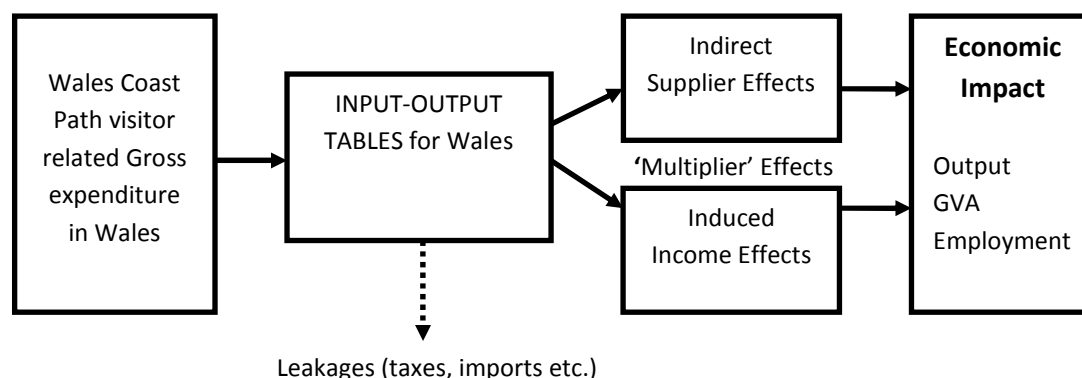
In addition to the Input-Output tables, the analysis also used the Tourism Satellite Account (TSA) for Wales 2007 (produced by Cardiff University for Visit Wales in 2010). Using this tool, further analysis was possible on aspects of tourism’s economic significance. The TSA provides a wealth of information on tourism’s direct economic importance to Wales, including an employment module detailing how tourism directly supports Welsh employment.

The TSA allows the estimation of Tourism Direct Gross Value Added (TDGVA). This variable shows how much of the gross value added (GVA) created in Wales is as a result of tourists’ spending before, during, or after trips to Wales. Cardiff University has undertaken additional work to develop a modelling structure from the Welsh TSA linking to the Input-Output framework described above. This is known as the Tourism Impact Planning Model for Wales and it is from this model that the impact figures are derived.

### 3.4 Summary of Approach

The approach taken to estimate the economic impact of Wales Coast Path visitor spending is illustrated in Figure 1. Here, the direct spending of visitors to the Path is used within the framework of the Input-Output tables for Wales, and the Tourism Impact Model for Wales, to estimate indirect supplier and induced income effects.

**Figure 1 Estimation of Net Economic Impact in Wales**

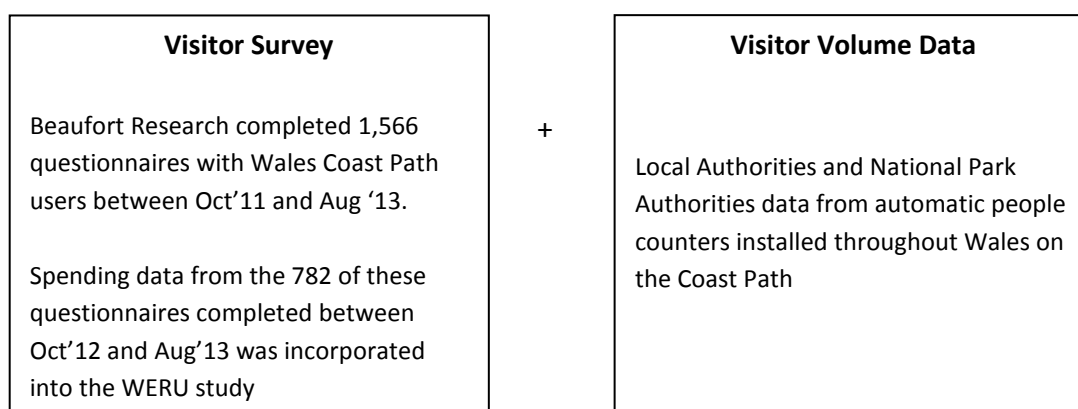


### 3.5 Data Sources

Visitor volume estimates were combined with data from visitor surveys and modelling of the indirect impacts of visitor spending to provide a gauge of the project's overall economic impact. The estimates of visit numbers to the Path were supplied by Local Authorities and National Parks.

Visitor numbers were collected through automatic people counters at locations around the whole of the Welsh coast. The visitor surveys, which were carried out by Beaufort Research at 56 different interview sites, provided data on the spending of respondents (including major items such as food and drink, travel and accommodation) and type of visit (day-trip or overnight).

**Figure 2 Data Sources to Inform Direct Economic Effects of the Wales Coast Path**



### 3.6 Automatic People Counter Data

Natural Resources Wales (NRW) supplied Cardiff Business School with visitor number data from each of the fifteen local authorities covered by the Wales Coast Path. The data was captured using automatic people counters. Where possible data was collected for the time period October 2012 to September 2013, so as to cover one whole year and be as up-to-date as possible for the research analysis. Where data was not available for this period, the newest available data for a one year period was used as a proxy.

It should be noted that concerns exist regarding the accuracy of visitor volumes estimated through the use of automatic people counters. Different types of counters are likely to produce different magnitudes of error. Also, there may be the possibility of double-counting users of the Path who are undertaking round trips on their return journey.

Expert opinion was sought by the research team from a small number of stakeholders for the Wales Coast Path regarding the usage of automatic people counters. This found that appropriate calibration processes were being used, and 'manual' observation checks were undertaken to ensure the accuracy of counts on the more established sections of the Path. Here also past work carried out on comparing automatic with manual counting was examined, with the overall numbers in this analysis being shown to have a high degree of similarity between the two methods. The vast majority of the local authorities involved reported using the same company (Linetop), who are generally agreed to have a high level of expertise, particularly with regards to offering guidance on the appropriate placing of counters.

Due to the fact that it is impractical because of cost/time issues to have people counters on every section of path, there is likely overall to be an element of undercounting. Furthermore, a few local authorities were unable to report figures for every section in their locality due to broken or stolen counters. Rather than attempt to estimate for these 'missing' sections it was agreed to only use actual counter captured figures, giving a conservative, but more defensible estimate.

## 4. Results

Following the methodology described above this section presents the estimates of direct spending associated with visitors to the Wales Coast Path. It then calculates the resulting indirect economic effects associated with this spending.

### 4.1 Visitor Numbers in 2013

Visitor counter data received indicated that there were an estimated total of 2.82 million visits on the Wales Coast Path between October 2012 and September 2013. Table 2 shows the breakdown by local authority area.

**Table 2: Visitor Volumes on the Wales Coast Path by local authority area (October 2012 to September 2013)**

Local Authority Area	Visitor Counter Numbers on Wales Coast Path	Within Convergence Area?
Anglesey <sup>1</sup>	93,217	Yes
Bridgend <sup>1</sup>	666,625	Yes
Cardiff <sup>2</sup>	128,669	No
Carmarthenshire <sup>1</sup>	6,205	Yes
Ceredigion	134,417	Yes
Conwy <sup>1</sup>	3,456	Yes
Denbighshire <sup>1</sup>	37,204	Yes
Flintshire <sup>3</sup>	419,603	No
Gwynedd <sup>1</sup>	281,699	Yes
Monmouthshire	71,736	No
Neath Port Talbot <sup>1</sup>	43,242	Yes
Newport	82,841	No
Pembrokeshire	98,162	Yes
Swansea <sup>1</sup>	375,423	Yes
Vale of Glamorgan <sup>1</sup>	381,018	No
<b>TOTAL</b>	<b>2,823,517</b>	

Source: Automatic people counter data supplied by local authorities to NRW.

Data is for October 2012 to September 2013 except where specified:



1- Figure is for July'12 to Jun'13; 2- Figure is for Jan'12 to Dec'12; 3- Figure is for Oct'09 to Sep'10. Combining the visitor counter data from Table 2 with survey data relating to make-up of party and type of stay (daytrip or overnight stay), an estimate of adult visitor numbers for the Convergence area and Non-Convergence area covered by the Wales Coast Path were calculated. Table 3 highlights that an estimated 1.47 million visits were made by adults to sections of the Path in a Convergence Area, and 0.98 million visits were made by adults to Non-convergence Areas of the Path.

The proportion of daytrip visitors was higher in the Non-Convergence Area (91%) than the Convergence Area (56%), with this being an important factor in driving levels of expenditure.

**Table 3: Visitors to the Wales Coast Path by Type and Area (October 2012 to September 2013)**

	All Visits	Adult Visits	Adult Day Trips	Adult Overnight Trips
<b>Convergence Area</b>	1,739,600	1,471,300	823,900	647,400
<b>Non Convergence Area</b>	1,083,900	979,900	891,700	88,200
<b>Total</b>	2,823,500	2,451,200	1,715,600	735,600

## 4.2 Direct Spending

### Day trips

Table 4 shows that average reported expenditure per adult day-tripper for their whole visit (on path and off) was 66% higher in the Convergence Area (£4.61) when compared to the Non-Convergence Area (£2.79). Around £6.3m was estimated to be spent in Wales in total as part of day visits incorporating the Wales Coast Path.

**Table 4: Expenditure by Adults on a Daytrip to the Wales Coast Path (October 2012 to September 2013)**

	<b>Adult Daytrips</b>	<b>Average Spend per Adult (£)</b>	<b>Gross Spend (£m)</b>
<b>Convergence Area</b>	823,900	4.61	3.80
<b>Non-Convergence Area</b>	891,700	2.79	2.49
<b>Total</b>	<b>1,715,600</b>	3.67	<b>6.29</b>

### Overnight trips

It was estimated that there were 0.735 million overnight trips in Wales made by visitors to the Wales Coast Path. These involved some 2.816m staying nights and total expenditure of £95m. However, to calculate the proportion of this spending that could be attributed to the Wales Coast Path (rather than other visitor attractions the tourists may have visited) one night's expenditure for each trip was assumed to be Path related.

**Table 5: Expenditure by Adults visiting the Wales Coast Path who stayed overnight away from home in Wales (October 2012 to September 2013)**

	<b>Adult Trips</b>	<b>Nights</b>	<b>Spend (£m)</b>	<b>Average spend per night (£)</b>	<b>Wales Coast Path related spend (£m)</b>
<b>Convergence Area</b>	647,400	2,590,800	79.01	30.50	19.74
<b>Non-Convergence Area</b>	88,200	225,400	16.04	71.19	6.28
<b>Total</b>	<b>735,600</b>	<b>2,816,200</b>	<b>95.05</b>	<b>33.75</b>	<b>26.02</b>

By assuming that only one night's expenditure is Wales Coast Path related the estimate for these visitors is possibly conservative. Based on these calculations a contribution of just over £26m was spent by Wales Coast Path visitors in Wales in the year to end of September 2013.

#### **4.3 Summary of spending by visitors to the Wales Coast Path**

The total volume of Wales Coast Path visitors and associated spending was then calculated from the data outlined above and is summarised in Table 6. It is estimated that the expenditure associated with the 2.45 million Wales Coast Path trips undertaken by adults between October 2012 and September 2013, was around £32.3m.

Convergence Area spending was estimated at nearly £23.54m, and Non-Convergence £8.77m.

**Table 6: Total trip volume and gross spending by visitors to the Coast Path in Wales  
(October 2012 to September 2013)**

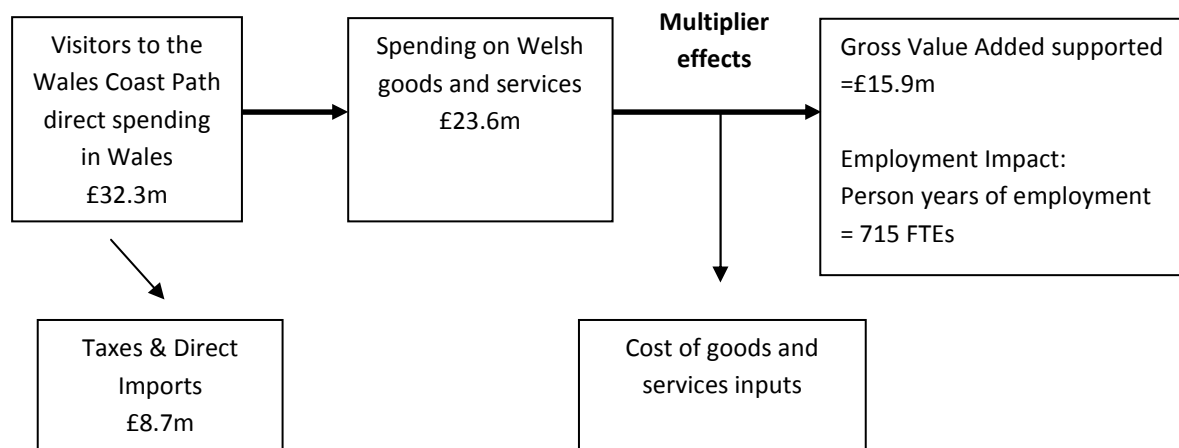
Area	Volume of Trips (Adults)	Average expenditure per adult (£)	Total Expenditure Wales Coast Path related (£m)
Convergence Day Trips	823,900	4.61	3.80
Convergence Overnight	647,400	30.50	19.74
<b>Convergence Total</b>	<b>1,471,300</b>	<b>16.00</b>	<b>23.54</b>
Non-Convergence Day Trips	891,700	2.79	2.49
Non-Convergence Overnight	88,200	71.19	6.28
<b>Non-Convergence Total</b>	<b>979,900</b>	<b>8.95</b>	<b>8.77</b>
<b>TOTAL WALES COAST PATH</b>	<b>2,451,200</b>	<b>13.18</b>	<b>32.31</b>

It is the figures in Table 6 that become the basis for analysis of economy wide effects associated with this level of tourism consumption.

#### **4.4 Economy wide effects of visitors to the Wales Coast Path**

The direct spend of visitors to the Wales Coast Path between October 2012 and September 2013 is estimated at £32.3m. Some of this spending goes on goods and services that are imported into the Welsh economy, and some 'leaks' out in the form of taxes. Figure 3 illustrates what happens to the initial direct spending total as it is modelled to estimate the indirect impact of Wales Coast Path visitor spend.

**Figure 3 How the Direct Expenditure by Visitors to the Wales Coast Path flows through to Outputs**



The gross spending figure (£32.3m) was firstly discounted for leakages such as taxes (including VAT), and spending on goods and services that are imports to Wales. The Welsh Tourism Satellite Account was used to inform the levels of import propensity. The leakages (taxes plus direct imports) were here estimated at around £8.7m. For walking related goods bought in Wales but manufactured elsewhere (typically including jackets and boots), only a small element of the related spend is likely to be maintained in the region. Here only the retail profit margin will be kept in Wales.

The Tourism Impact Planning Model for Wales shows that, for day trip visitors in the region, around 35% of their expenditure is taken up by goods and services imported from the rest of the world (outside of the UK), and production taxes. These monies are therefore leaked out of the calculations for estimating the economic impact of visitors to the Wales Coast Path on Wales.

Similarly, from the Tourism Impact Planning Model for Wales, around 25% of the monies spent by overnight stay visitors are shown to leak out of the Welsh economy (due to spending on non-Welsh goods and services, or taxes).

Once these leakages are removed, the remaining net expenditure resulting of £23.6m is an injection into the Welsh economy. Businesses receiving these monies then re-spend it in successive indirect rounds (e.g. accommodation providers purchase goods and services from other Welsh sectors to meet the needs of their visitors, causing these suppliers to then purchase outputs from elsewhere, and so on). The resulting increase in the output of local providers increases local wealth, which in turn leads to increases in the levels of spending.

The overall economic impact is defined in terms of changes in output, gross value added (incomes), and employment that result in the economy. The size of these impacts depend upon the extent to which injections into the economy are retained regionally (so that the larger the propensity to spend on imported goods and services the smaller the amount that will be kept within the Welsh economy). This is expressed numerically by the multiplier coefficient. The lower the ability of the local economy to meet demand for goods and services, the higher the leakages (as spending takes place on imports), and the lower the multiplier.

Table 7 shows the short-term related expenditure impact of visitors to the Wales Coast Path on Wales. These activities resulted in an additional £31.7m of demand in the Welsh economy.

Some of this additional output does not add to Welsh employment or incomes (e.g. cost of goods and services inputs) and the measure Gross Value Added (GVA) is a more appropriate metric for regional economic impact. The additional activity in the regional economy was associated with £15.9m of GVA (GVA is considered the most appropriate true measure of the value of economic activity, summing locally earned incomes, company profits and some taxes).

The indicative estimate of the employment impact that might be associated with visitors to the Wales Coast Path spending for Wales between October 2012 and September 2013 is around 715 person-years of employment.

**Table 7: The Economic Impact of the Spending of Visitors to the Wales Coast Path  
(October 2012 to September 2013)**

	Convergence Area	Non- Convergence Area	All Wales Total
Output (£millions)	23.5	8.2	<b>31.7</b>
Gross Value Added (£millions)	11.8	4.1	<b>15.9</b>
Employment (FTE*)	535	180	<b>715</b>

\*FTE = Full-Time Equivalents

#### **4.5 Economic Impact by Welsh Industrial Sector**

Table 8 shows the estimated expenditure related impact of visitors to the Wales Coast Path split by industrial sector in Wales for October 2012 to September 2013. The impact was most concentrated in Accommodation (£5.1m of gross value added) and Restaurants/ Bars/ Cafes (£2.3m GVA).

A major point of interest here is that the impacts resulting from the spending of visitors to the Wales Coast Path are not just experienced in 'tourism facing' sectors such as accommodation. Table 8 highlights that visitor spending supported activity in financial and business services (£1.8m GVA), and transport/communication (also £1.8m GVA).

**Table 8: The Economic Impact of the Visitors to the Wales Coast Path in Wales (October 2012 to September 2013), breakdown by industrial sector**

<b>Sector</b>	<b>Output (£m)</b>	<b>GVA (£m)</b>	<b>FTEs</b>
Manufacturing sectors	5.0	1.3	30
Distribution/ Retail	4.1	2.2	90
Accommodation	8.7	5.1	285
Restaurants etc.	4.3	2.3	140
Transport & Communication	4.0	1.8	65
Financial & Bus. Services	3.0	1.8	40
Recreation etc.	0.3	0.2	5
Public Sector (inc. forestry)	1.7	0.9	40
All other industries	0.6	0.3	20
<b>TOTAL</b>	<b>31.7</b>	<b>15.9</b>	<b>715</b>

#### **4.6 Conclusion**

The analysis presented above provides an estimation of the economic impacts of Wales Coast Path visitor spending on the Welsh economy in 2013. With the Path being officially opened in May 2012 the research represents an indication of the annual economic value generated from visitors for a full-year post-completion.



## 5. Summary

- The economic impacts that are attributable to the Wales Coast Path take place largely away from the Path itself (e.g. spending occurs in shops and on accommodation etc. in local towns). The analysis therefore looked at all trip related spending whether on, or away, from the path.
- There were an estimated 2.82 million visits to the Wales Coast Path between October 2012 and September 2013; 2.45 million of these were by adults (defined as those aged 16 years or over).
- Gross expenditure by adult visitors on these trips was estimated at £32.3m.
- With leakages (in the form of imports and taxes) taken away from this direct spending the indirect impacts were assessed using Input Output modelling; the overall economic impacts of visitor spending attributable to the Wales Coast Path in 2013 were then estimated as:
  - £31.7m of additional demand in the Welsh economy
  - £15.9m of gross value added, and
  - Around 715 person-years of employment.
- In the Convergence area section of the Wales Coast Path the overall impacts were estimated as:
  - £23.5m of additional demand in the Welsh economy
  - £11.8m of gross value added, and
  - 535 person-years of employment.
- The overall Non-Convergence area visitor spending impacts were estimated as:
  - £8.2m of additional demand in the Welsh economy;
  - £4.1m of gross value added, and
  - 180 person-years of employment.
- Visitor spending attributable to the Wales Coast Path creates economic impacts throughout different sectors of the Welsh economy, not just in traditional 'tourism-facing' sectors such as accommodation. In 2013 an estimated £1.8m of gross value added was supported in the financial services sector in the Welsh economy as a result of Coast path visitor spending, and a similar amount in the transport and communications sector.

