

# THE ECONOMIC VALUE OF THE SOUTH WEST COAST PATH.



**Report Compiled on behalf of South West Coast Path team by  
Tourism Associates and South West Tourism.**

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## EXECUTIVE SUMMARY

### **What is this study?**

This is a survey of the economic value accrued as a direct outcome of the South West Coast Path (SWCP). It investigates the value derived not just as a result of staying overnight guests (i.e. tourists), but also those using the SWCP as day visitors from the four counties through which it runs (Somerset, Devon, Cornwall, and Dorset). Our main aim was to produce a 'global' estimate of the total economic value derived from the SWCP.

The research presented here is not a formalised economic impact survey in that not each and every aspect of the economic value of the SWCP is explored, nor do we attempt to model the economics of the SWCP. Rather, the study focuses on several key economic outcomes derived from the SWCP. These are the economic value generated from overnight guests whose main purpose was to use the SWCP and also from the use of the SWCP by residents in the four counties and their visitors. To address these research themes, a comprehensive research programme was devised. This comprised three principal data collection and four data analysis exercises to address our research questions, aims and objectives. Three of the exercises concerned business-related assessments of the value of the SWCP; one was concerned with an assessment of value based on coast path use by SW residents. The former included estimates of value in four representative coastal corridors as a precursor to an estimate of total value from tourists throughout the 630 mile corridor (driven by South West Tourism's economic value data set for 2001), and a focus on the low cost, non-serviced accommodation sector (i.e. hostels). The latter centred on the value revealed by a survey of local residents.

### **Who has done this research?**

This research was carried out by Tourism Associates (an independent tourism consultancy based at the University of Exeter) and the Research Department at South West Tourism. This partnership was under the supervision of the South West Coast Path team. The research was funded by the Countryside Agency and the South West of England Regional Development Agency (SWRDA).

### **Why was it done?**

The SWCP is in its 25th Year. As the longest of the 13 national trails in England and Wales, it is recognised as one of the South West region's principal tourism attractions and leisure facilities. Previous work by South West Tourism identified that six million people use the SWCP annually. However, before this project our understanding of the economic value derived from the SWCP was partial. A user survey carried out in 1994 estimated that the SWCP could be worth £15 million annually to the region's economy. This research was intended to result in a more complete and up-to-date insight into the economic value of the SWCP.

### **Summary of findings**

The first part of the research, which is based on surveys of a sample of accommodation providers in four coastal corridors (but excludes group accommodation) revealed that the SWCP is an important selling point for 73.3% of accommodation providers. They estimated that 27.60% of annual visitors were derived purely because of proximity to the

SWCP and 15.21% of income was derived purely because of proximity to the SWCP. By extrapolating the sample data throughout a 1-mile coastal cordon and using SW Tourism's recent economic value data, the total economic value derived from the SWCP was estimated at £135.7 million. The contribution of the SWCP varied in the four corridors. Upper and lower limits were applied to this calculation such that the estimate of economic value ranges from £102.6 million to £151.4 million.

In the case of low-cost, non-serviced accommodation, an identical method was adopted. 79.0% of independent and YHA hostels recognised the SWCP as an important selling point. 27.20% of income was derived purely because of proximity to the SWCP, while 36.18% of annual visitors were identified as having been generated purely because of proximity to the SWCP. The value derived purely from SWCP for low-cost, non-serviced accommodation (hostels) was estimated to be £7.2 million.

Together these results suggest the total economic value derived purely from the SWCP through accommodation of all types is £142.9 million. Notwithstanding the magnitude of these figures, it is important to note that they are likely to underestimate the true value because they are based on estimates of spending by visitors staying in a 1-mile coastal corridor only, and they pertain to income and visitor stays derived *purely* from the SWCP. The values are extrapolated from South West Tourism's regional survey of the economic value of tourism (data from 2001). These economic values detail total trip spend at a destination on hospitality, services, transport etc. as well as spend on accommodation.

Our final research concerned the assessment of usage of the SWCP amongst residents of Somerset, Devon, Cornwall, and Dorset, and average spending patterns amongst these residents whilst using the SWCP. The combined figures for all counties show 23 million walks taken on the SWCP each year by households in the four counties. This generates an estimated spend of £116 million by residents whilst using the SWCP. An estimated 2.6 million walks are used to entertain visiting friends and relatives (VFR). VFR walks bring an estimated 8.8 million additional walkers with an additional spend of £48 million. This results in a resident-related economic value of £164 million. When the resident-related spending is added to that accrued from visitors staying in commercial accommodation and hostels, we have an estimate for the total economic value of the SWCP of £307 million.

These findings and their derivation are discussed in more detail in the relevant sections of the report.

## SECTION 1

# INTRODUCTION

## **1.1 Background**

The South West Coast Path (SWCP) is a national trail that winds its way for 630 miles around the peninsula coastline. The SWCP is the longest of 13 national trails in England and Wales, and it is recognised as one of the region's principal tourism assets and leisure facilities. South West Tourism estimates that each year six million people use the SWCP, making it one of key tourist attractions in the region and a major determinant in people's holiday decisions.

However, our understanding of the economic value of the SWCP and its contribution to the South West's economy is incomplete. A user survey of the path carried out in 1994 estimated that the SWCP could be worth £15 million annually to the region's economy. In a separate study in 2002, visitors to Falmouth and Newquay were asked whether they were intending to walk along cliff tops or the coast during their visit to the resorts and the surrounding areas. 20% of respondents in Falmouth and 39% in Newquay indicated that they intended to walk along the coast or cliffs during their visit. Furthermore, 23% of Falmouth visitors and 23% of Newquay visitors indicated that the opportunity to walk along the coast or cliffs was an important factor in their decision to visit.

2003 is the Silver Jubilee of the SWCP. To mark this important milestone, new research was commissioned by the South West Coast Path team with the financial support of the Countryside Agency and the South West of England Regional Development Agency. Its principal aim was to assess more fully the current economic value of the SWCP. In short, this was intended to concentrate on the value generated from overnight guests whose main purpose was to use the SWCP and also on the value generated by local residents' usage. The full detail of these investigations and their parameters is discussed below.

This project was commissioned in December 2002 and the research programme was undertaken from December 2002 to March 2003. The research was undertaken by a partnership between Tourism Associates (a tourism consultancy at the University of Exeter) and the Research Department at South West Tourism. It was supervised by the SWCP team, and funded by the Countryside Agency and South West of England Regional Development Agency (SWRDA).

## **1.2 Aims and Objectives**

The principal aim of the research programme was to assess the economic value derived from the SWCP. The project explored the value derived not just as a result of staying overnight guests (i.e. tourists), but also those using the SWCP as local day visitors from the four counties through which the SWCP runs.

More specifically, our objectives were to:

- assess the importance of the SWCP to accommodation providers' businesses (including hostels as a distinct subset);
- estimate the overall value generated by the SWCP associated with overnight visitors staying in commercial accommodation;
- establish the level of usage of the SWCP among residents and their guests within the four counties through which the SWCP passes (Somerset, Devon, Cornwall, and Dorset);
- determine the average spending patterns among these residents while using the SWCP; and to
- estimate the overall value generated by these residents and their visitors using the SWCP.

The addition of the values associated with the second and last objectives would produce a 'global' total economic value derived from the SWCP.

### 1.3 Research Foci

The SWCP passes through four of the South West's counties: Somerset, Devon, Cornwall, and Dorset. Within Somerset, the SWCP follows the coast from Minehead westwards to the Devon border. The research contained in this report is based on these areas.

It is important to note that the research presented here is not a formalised economic impact survey in that not each and every aspect of the economic value of the SWCP is explored, nor is the economic performance of the SWCP modelled. Rather, this research focuses on several key economic outcomes derived from the SWCP. These are the economic values:

- generated from overnight visitors staying within one mile of the coast whose main purpose was to use the SWCP; and
- derived from the use of the SWCP by residents in the four counties and their visiting friends and relatives.

To address these principal research themes, a comprehensive research programme was devised. This contained three principal data collection and four data analysis exercises in order to address our research questions, aims and objectives. Three of the data analysis exercises concerned assessments of the value of the SWCP based on surveys of businesses; one concerned itself with the assessment of value based on coast path use by SW residents and their friends and relatives.

More specifically, the four research components were:

- **Accommodation Research.** An analysis of the SWCP's value to accommodation providers in four coastal corridors. The results of this stage informed the calculation of the....
- **Tourism Value Estimate.** Based on the assessments of the value and significance of the SWCP to accommodation providers in the four coastal corridors, calculations were made of the overall estimated value to the region's economy as a result of the

SWCP. This calculation was based on SW Tourism's economic value data set for 2001.

- **Low cost, Non-serviced Accommodation Research.** The SWCP is punctuated by many low cost, non-serviced accommodation units, mainly in the form of Youth Hostels and private (backpackers') hostels. From the client's existing knowledge of SWCP usage, such accommodation is frequently used by SWCP walkers. For this reason, it was decided to concentrate more specifically on the value of business generated by the SWCP in this sector.
- **South West Residents Research.** As a contrast to the previous three exercises, this aspect of the research focused on determining the value of the SWCP from the demand side rather than the supply side as above. This explored levels of usage of the SWCP among residents in the four counties of the SWCP, and established the economic value accrued through the SWCP by the identification of average spending patterns among residents and their visiting friends and relatives while using the SWCP.

## SECTION 2

### METHODOLOGY

#### **2.1 Survey Tools**

Three survey tools were designed to explore the economic outcomes derived from the SWCP. For each of the three principal data collection exercises a standardised questionnaire was used (full texts of the questionnaires and their accompanying letters are to be found in appendices 1, 4 and 6).

The questionnaires were developed and tested in full consultation with the SWCP team over a period of approximately six weeks. This culminated in three data collection exercises in January 2003 and February 2003.

This period was chosen for the research as it coincided with the start of the 25<sup>th</sup> Anniversary Year of the SWCP and the research was part of the programme to mark the anniversary. It was, however, during the off-peak season. This meant that some of the accommodation providers were not yet open (some didn't open until March), but response rates were not unduly diminished as a consequence, and viable and robust samples could be generated for the two supply-side surveys.

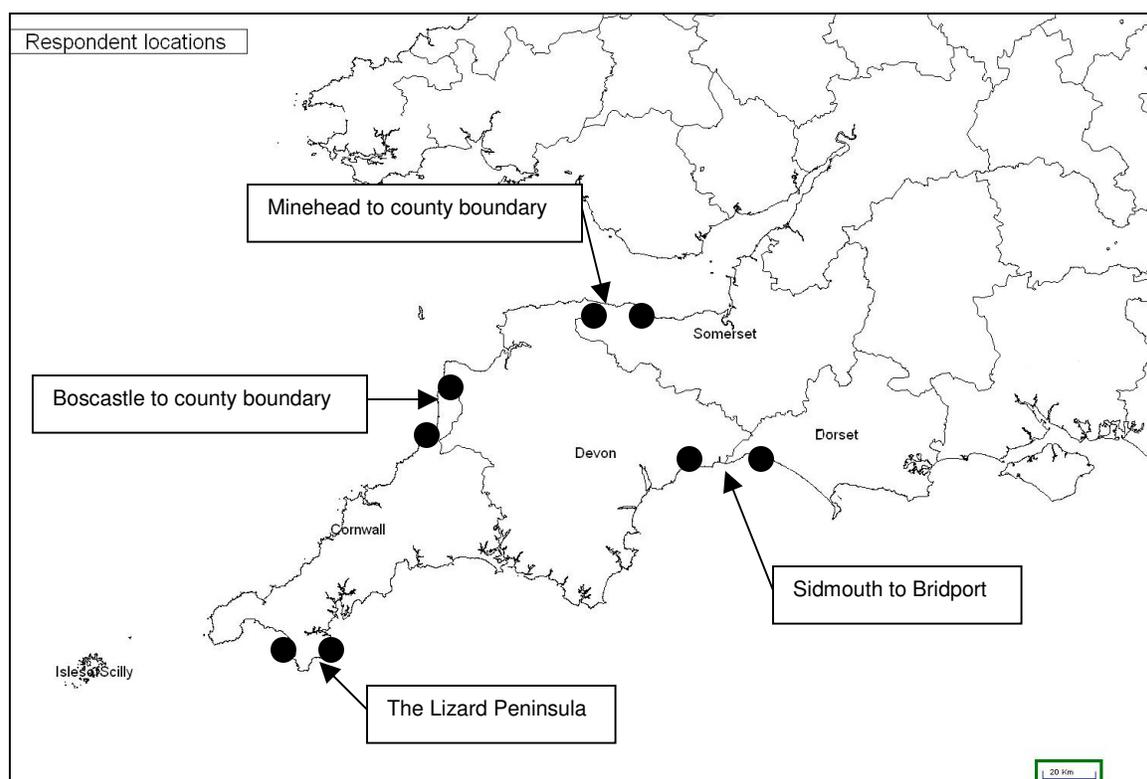
##### 2.1.1 Accommodation Research

A 3-page questionnaire (appendix 1) was devised by Tourism Associates in full collaboration with South West Tourism and the SWCP team. This was intended to explore the value and importance of the SWCP to accommodation businesses.

Four coastal corridors were selected for the application of the questionnaire (see 2.2.1). These were selected on the basis that they represent the different kinds of settings through which the SWCP passes. It was initially our intention to mail approximately 100 accommodation providers in each of the four corridors with the questionnaire. However, a combination of the process of extracting names to exclude addresses more than one mile from the coast and subsequent checks for double-entries produced a list of 327 valid addresses, which were distributed as follows (see figure 1):

- Minehead, west to the Devon boundary = 72
- Boscastle, north-east to the Devon boundary = 71
- The Lizard Peninsula = 96
- Sidmouth to Bridport = 88

Figure 1: The four coastal corridors.



### 2.1.2 Low cost, Non-serviced Accommodation Research

A 2-page questionnaire (appendix 4) was devised by Tourism Associates in full collaboration with South West Tourism and the SWCP team. This was intended to explore the value and importance of the SWCP to the business of YHA and independent hostels.

The questionnaire was directed at hostel managers and the SWCP team provided a list of 32 potential addressees. This comprised YHA establishments and independent hostels in coastal locations in the area of the SWCP. Given the small size of the sector and the time of year of the survey, ensuring a reasonable response rate was identified as a critical issue. In order to boost response rates beyond merely a 'mail-and-return' approach, we pursued non-completions with telephone follow-ups.

### 2.1.3 Resident Research

A telephone (questionnaire) interview was conducted by the research team at South West Tourism to gather data on residents' usage of, and associated spending derived from, the SWCP. 416 residents were interviewed. The 416 respondents were chosen at random from a sample of 1,200 residents. The sample of 1,200 residents was generated to be representative of the demographic and geographical contours of the four counties. An introductory letter, explaining the nature of the research, was mailed out (appendix 6) to the 1200 residents.

## 2.2 Sampling Issues

Sampling issues surround the way that a sample is constructed and its ability to reflect and to represent clearly and accurately the wider trends evident in a background population. All sample surveys are subject to statistical error. The size of this error varies with the sample size, the assumptions made in the research process, and also with the order of magnitude of the research findings being considered. In the following section, the sampling issues we encountered and possible limitations of the data are discussed.

### 2.2.1 Accommodation Research (Coastal Corridors and Tourism Value Estimate)

As described in 2.1.1, four 'coastal corridors' were selected for the investigation of the significance of the SWCP for accommodation providers (figure 1).

To derive average values of the economic impact of the SWCP on accommodation providers, we sampled coastal corridors that reflect the variety of landscape settings through which the SWCP passes.

The coastal corridors (and their **short names** used hereafter in the report) were:

- Minehead to the Devon boundary (**Minehead Corridor**). This corridor in Somerset passes the adjacent Exmoor National Park and terminates in a major seaside resort. This stretch allowed investigation of the importance of the SWCP where the traditional 'bucket and spade' holiday and short coastal breaks are taken.
- Boscastle to the Devon boundary (**Boscastle Corridor**). This stretch along the north Cornish coastline includes cliff top walking, excellent surfing beaches and the major resort of Bude.
- Sidmouth to 'Bridport' (**Sidmouth Corridor**). This stretch runs from Devon into Dorset. It was chosen because it includes the Jurassic coast in Dorset, and because it is punctuated by several seaside resorts. This stretch, like Minehead, allowed investigation of the importance of the SWCP where traditional 'bucket and spade' holidays and short coastal breaks are taken.
- The Lizard Peninsula (**Lizard Corridor**). This corridor in southern Cornwall was chosen because of its extreme southerly and westerly position, and because the SWCP encircles the peninsula. The SWCP is one of only a few major tourist attractions on the Lizard, and hence the Lizard offered the opportunity to address the value of the SWCP on a stretch of coastline with a (hypothetically) high dependence on it as a recreational and tourism resource.

In order to assess the importance of the SWCP more accurately, data was collected from accommodation providers within a 1-mile cordon inland along each coastal corridor as it was felt that the principal effect of the SWCP is felt by those accommodation providers closest to the SWCP. A list of potential respondents was constructed through South West Tourism's comprehensive database of accommodation providers in the region. All postcode boundaries within or bisecting the one-mile cordon along each coastal corridor were identified. For each of the coastal corridors, the addresses of all

accommodation providers within the postcode 'zones' were then collected. These formed the background population from which our samples could be drawn.

The issue of distance decay is an important one. As noted below, this is one of several features which contributes to the likelihood that our calculations of economic value accrued from the SWCP are underestimates (cf. section 3.2).

Hostels (low cost, non-serviced accommodation providers) were filtered from the database as potential respondents to this exercise; they were to be considered separately (cf. section 3.3). All other serviced and non-serviced accommodation, such as hotels, bed and breakfasts, self-catering and caravan sites, qualified for inclusion.

South West Tourism's Regional Economic Value Research, which provides data of all expenditure associated with staying trips, not just the value to accommodation providers, was used as secondary data from which to derive estimates of economic value based on our survey results.

124 responses were received from 327 mailed questionnaires, or a total response rate of 37.92%. Of these questionnaires, 23 could not be included in the analysis: 9 were returned without completion; 2 described themselves as hostels (and hence were excluded); and 12 respondents had either gone out of business or retired from the trade. Thus, the effective response rate was 30.89% (or 101 responses from 327 mailed questionnaires). For the time of year of the survey as well as the highly focused nature of the enquiry, both response rates were favourable. The data collected in this element of the project may be used with confidence as a reasonable reflection of the cross-section of accommodation providers in the four counties.

#### 2.2.2 Low cost, Non-serviced Accommodation Research

Within the four counties, there are 32 hostels at or near to the coastline (both independent and YHA). All coastal hostels were surveyed. 22 replies were received to the questionnaire, or a 68.75% response rate. 19 of the respondents described themselves as in a coastal position, 3 described themselves as rural. These three responses have been excluded from the analysis. Thus, our survey accessed 59.38% of the hostels along the coast (19 of 32).

This response rate was high for a postal questionnaire, especially at this time of year. Notwithstanding, we attempted to boost our response rate further by follow-up telephone calls. However, some hostels remained closed, and some hostel managers chose not to participate in the survey. Although the absolute number of respondents appears small, this aspect of the research is a robust and representative sample.

#### 2.2.3 Resident Research

A minimum of 400 telephone interviews throughout the four counties was the aim. This minimum sample was chosen so that one can be 95% sure that the results will not vary by more than +/-5%. This slight variation needs to be borne in mind when interpreting the results.

To achieve this target, **all** resident **households** in the four counties were segmented by their socio-economic characteristics so that no group was excluded from the sampling process (1 million+). From this segmentation, a sample of 1,200 households from the

four counties was created. From this sample of 1,200, 416 residents of Somerset, Devon, Cornwall, and Dorset were interviewed on a random basis. Finally, in order to achieve a representative spread across the four target counties, interviewing stopped when the following proportions were achieved:

- Somerset - 19%
- Devon - 29%
- Cornwall - 26%
- Dorset - 26%

Throughout the analysis and selection process, the 'household' was chosen as the most effective unit for study. For example, in order to ensure that no group was excluded from the study, household income and characteristics taken from geodemographic selection packages is the most useful unit for analysis. Robust data is available regarding the number of households in the South West and this was used as the basis for extrapolating the findings from the research.

### **2.3 South West Tourism Regional Economic Value Data**

In order to assess the economic value of the SWCP, data from these surveys were coupled with the South West Tourism's 2001 survey of the regional economic value of tourism. The precise methods for the coupling are described in more detail at the relevant points in the results sections below (see sections 3.1.6, 3.2.3 and 3.3.6).

Published in 2003, the regional economic value of tourism survey provides accurate estimates of the value of domestic and overseas staying trips and day trips by county, unitary authority and local authority district for 2001. The data is the most up to date and accurate available at the regional and sub-regional level. It is based on published UKTS (United Kingdom Tourism Survey), IPS (International Passenger Survey) and UKDVS (United Kingdom Day Visitor Survey) data, with trips and spend distributed by known stock of accommodation in each local authority.

For the purposes of this project, we used data for the relevant unitary authorities and districts through which the SWCP runs. The data can be disaggregated according to the type of accommodation from which economic value is accrued. Thus, it is possible to differentiate between the economic value associated with serviced and non-serviced accommodation as well as the different types of accommodation in these broad groups. One particular advantage of the structure of the data set is that it allowed us to exclude group accommodation from the calculations of value for the four coastal corridors. Group accommodation is defined as low-cost, non-serviced accommodation, which caters for groups of visitors of all sizes as well as individual guests. Youth hostels, private hostels and campus accommodation are usually the main types of group accommodation. Campus accommodation and study/education/field centres are, however, excluded from the group definition in the South West Tourism database of accommodation because, first, there is no inspection criteria for such establishments and, second, they are not available for use as accommodation by visitors not attending courses. Due to the strong connections between low-cost, non-serviced accommodation and the coast, the volume and value derived from the SWCP through group accommodation is explored exclusively in its own section of the report.

The findings of South West Tourism's survey have been well received in policy and practitioner circles since their publication. For the first time, one of the country's major tourism destination regions has a comprehensive, systematic and consistent estimate of the economic value of tourism. Nevertheless, in terms of data reliability, it is important to note that trips and value are distributed according to known stock on South West Tourism's database that is dependent on co-operation from the industry.

## **2.4 Reporting Emphasis**

The survey tools were devised to explore a wide range of issues concerning the economic impact of the SWCP (cf. appendices 1, 4 and 6). The full sets of questions used in the questionnaires reflect our intention at the time to explore as far and as deeply as possible the economic value of the SWCP in its different guises. Some aspects were addressed more directly than others, and notwithstanding the development and piloting processes; some questions yielded richer data than others. In this report we have highlighted the principal and direct findings associated with the economic value derived from the SWCP as revealed in the four surveys. Other findings which do not form part of the main commentary of this report, but which nevertheless have relevance to the importance of the SWCP, are to be found in the appendices 3, 5 and 7.

## SECTION 3

# THE VALUE OF THE SWCP DERIVED FROM OVERNIGHT VISITORS

### PRINCIPAL FINDINGS

- The total economic value derived purely from the SWCP through visitors staying in accommodation of all types is **£142.9 million**.

Based on calculations from **four coastal corridors**, when all accommodation within one mile of the coast, except hostels is considered:

- The SWCP is an important selling point for 73.3% of accommodation providers.
- **27.60%** of annual visitors were derived purely because of proximity to the SWCP.
- 15.21% of income was derived purely because of proximity to the SWCP.
- The total economic value derived purely because of the SWCP is **£135.7 million** based on total spend of visitors staying within 1 mile of the coast.

In the case of **low-cost, non-serviced accommodation** (hostels),

- 79.0% recognised the SWCP as an important selling point.
- 27.20% of income was derived purely because of proximity to the SWCP.
- **36.18%** of annual visitors were derived purely because of proximity to the SWCP.
- The total economic value derived purely because of the SWCP is **£7.2 million** based on total spend of visitors staying in coastal hostels.

### **3.1 The Economic Value Derived from the SWCP in Coastal Corridors**

The aim of this analysis was to assess the importance of the SWCP to accommodation providers in the four counties by first of all concentrating on the values accrued in four representative coastal corridors.

#### 3.1.1 Responses to the Survey

101 usable responses were received from accommodation providers in the four coastal corridors. The highest response rate was received from the Lizard Peninsula (table 1).

Table 1. Responses to the coastal corridors questionnaire survey

| Coastal Corridor | Number of Respondents | Percent Received | Percent Issued |
|------------------|-----------------------|------------------|----------------|
| Minehead         | 14                    | 13.9             | 22.0           |
| Boscastle        | 25                    | 24.8             | 21.7           |
| Lizard           | 36                    | 35.6             | 29.4           |
| Sidmouth         | 26                    | 25.7             | 26.9           |
| <b>Total</b>     | <b>101</b>            | <b>100.0</b>     |                |

Relative to the number of questionnaires issued, Minehead is under-represented in our sample, while Boscastle and the Lizard, in particular, are over-represented.

The accommodation providers participating in the survey chose to describe themselves as:

- Guest houses (1.0%)
- Bed and Breakfasts (32.7%)
- Self-catering flats/apartments (43.6%)
- Hotel (12.9%)
- Holiday/caravan park (9.9%)

92 responses were received on the size of the establishments measured by bedspaces. The average size of the accommodation units participating in this survey was 56.42 bedspaces. They ranged from micro-businesses of 1 bedspace to 1200 bedspaces.

70 responses were received on the number of visitors received during 2002. The average number of visitors was 1590. The range was from 1 to 15,000.

98 of the accommodation providers described the geographical situation of their businesses. 76 were located on the coast, 1 on moorland, 3 in towns, and 18 were in rural locations.

### 3.1.2 SWCP as Selling Point

For 73.3% of the accommodation providers, the SWCP was seen as either a relatively important or huge selling point to their visitors. Indeed, 14.9% of the accommodation providers recorded that the SWCP is a huge selling point to most of their visitors.

When differentiated by corridor, the proportion of accommodation providers who found the SWCP an 'important' or 'huge' selling point is:

- 57.1% for Minehead corridor,
- 64.0% for Boscastle corridor,
- 91.7% for Lizard corridor, and
- 65.4% for Sidmouth corridor.

### 3.1.3 Length of Stay

In terms of mean average duration of stay, SWCP walkers stay 2.69 nights in each place, while non-SWCP walkers stay 4.62 nights. The average for all visitors (SWCP walkers and non-walkers) is 3.64 nights.

This average length of stay for SWCP walkers varies with each corridor as follows:

- Minehead Corridor – average stay of 1.09 nights for SWCP walkers
- Boscastle Corridor – average stay of 2.00 nights for SWCP walkers
- Lizard Corridor – average stay of 3.32 nights for SWCP walkers
- Sidmouth Corridor – average stay of 3.54 nights for SWCP walkers

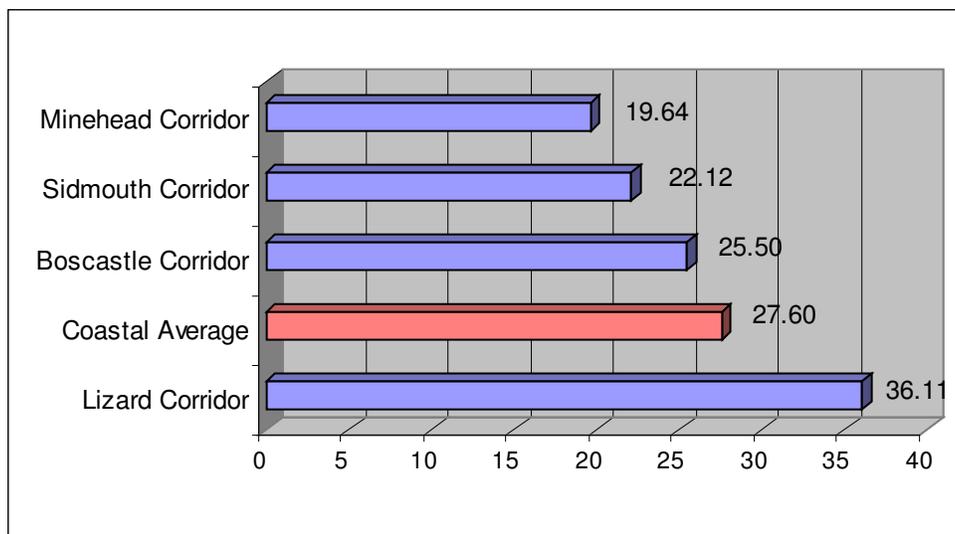
These figures are taken into account in the calculation of total spend (see sections 3.1.6 and 3.2.3) because they form the basis for the correction factors when compared with the average stay of all visitors (SWCP walkers and non-SWCP walkers) for each corridor. These are:

- Minehead Corridor – average stay of 2.17 nights for all visitors
- Boscastle Corridor – average stay of 3.05 nights for all visitors
- Lizard Corridor – average stay of 4.32 nights for all visitors
- Sidmouth Corridor – average stay of 4.10 nights for all visitors

### 3.1.4 Percentage of Annual Visitors Derived Purely Because of Proximity of SWCP

In terms of visitor stays derived purely from the SWCP, the average value for the coastal localities was 27.60% (figure 2). The highest proportion was recorded in the Lizard corridor, while in the Minehead corridor nearly a fifth of annual visitors were derived purely because of proximity to the SWCP.

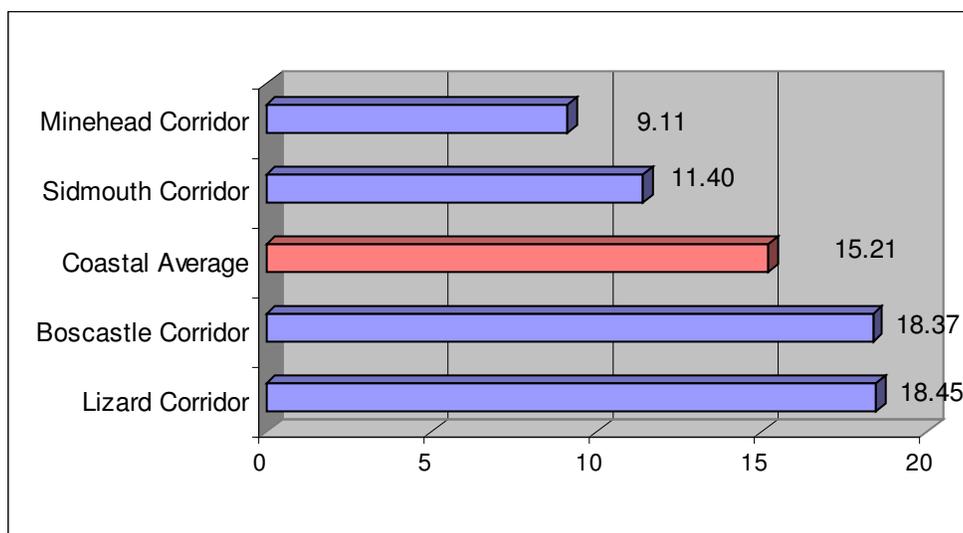
Figure 2: Average annual visitor stays derived purely because of proximity to SWCP (%)



### 3.1.5 Percentage of Annual Income Derived Purely from SWCP

In terms of annual income derived purely from the SWCP, the average value for the four coastal corridors was 15.21% (figure 3). The highest proportions were recorded for the Lizard and Boscastle coastal corridors, while the lowest proportion of derived income was in the Minehead corridor.

Figure 3: Average annual income derived purely from SWCP (%)



### 3.1.6 Economic Value Derived from SWCP in the Coastal Corridors

Based on the data presented above and on estimates of trips and total spend calculated by South West Tourism, the economic value derived purely from the SWCP through visitors staying in these four coastal corridors may be determined (table 2).

The term 'trip' is used in this analysis and in South West Tourism's data as it is derived from the UKTS. UKTS data provides estimates of trips, not visitors, because any given visitor might have taken several trips to a destination, and if only the visitor is counted there would be a serious underestimate of the volume of actual trips.

The calculations are based on the total values derived from each accommodation type (except group accommodation) in the district(s) through which a coastal corridor passes. For each accommodation type, the total district value is multiplied by the percentage of all district accommodation units located in that corridor.

The sum of the values for each type of accommodation (Type Corridor Values) is the Total Corridor Value (table 2). Each Total Corridor Value is broken down in appendix 2.

Subsequently, the Type Corridor Values are multiplied by the percentage of all visitors derived purely as a result of the coast path. This is the average figure for the coastal corridor and acts as an indicator of the percentage of trips derived purely because of the SWCP. This produces the Type Raw SWCP Values. The Raw SWCP Value in table 2 is the sum of the individual Type Raw SWCP Values.

A final correction factor is applied to the Raw SWCP Value. This pertains to the fact that trips made by SWCP walkers are, on average, shorter than the average for all visitors (cf. section 3.1.3). The Final SWCP Value is calculated by multiplying the Raw SWCP Value by the Correction Factor. The Correction Factor is simply the average length of SWCP trips divided by the average length of all trips expressed as a decimal fraction. This varies with each corridor as follows:

- Minehead Corridor – 0.5019
- Boscastle Corridor – 0.6550
- Lizard Corridor – 0.7666
- Sidmouth Corridor – 0.8617

### **Example: how this works for the Lizard Corridor**

Along the Lizard corridor there are 840 serviced accommodation bedspaces (appendix 2). This represents 48.6% of all serviced accommodation bedspaces in Kerrier. The total value derived from serviced accommodation along the corridor in Kerrier was £7,901,250, or 48.6% of the total Kerrier district value. The Type Raw SWCP Value figure is £2,853,141; that is, the Type Corridor Value multiplied by 36.11% (the average annual visitor trips derived purely from the SWCP in the Lizard corridor). This calculation was repeated for self-catering and centres/caravans, and the results were added to that for serviced accommodation to produce the Raw SWCP Value of £7,705,709. A Correction Factor of 0.7666 was applied, taking account of the generally shorter stays of SWCP visitors, to produce a Final SWCP Value of £5,907,197.

*Table 2. Value derived from the SWCP in the four coastal corridors.*

|                      | <u>Lizard</u> | <u>Boscastle</u> | <u>Sidmouth</u> | <u>Minehead</u> |
|----------------------|---------------|------------------|-----------------|-----------------|
| Total District Value | £58,048,000   | £175,478,000     | £307,092,000    | £104,887,000    |
| Total Corridor Value | £21,339,543   | £13,867,394      | £21,455,561     | £1,748,775      |
| Raw SWCP Value       | £7,705,709    | £3,536,186       | £4,745,970      | £343,459        |
| Correction Factor    | 0.7666        | 0.6550           | 0.8617          | 0.5019          |
| Final SWCP Value     | £5,907,197    | £2,316,202       | £4,089,602      | £172,382        |

## **3.2 The Economic Value of the SWCP**

The intention of this part of the research was to establish an estimate of the total economic value derived from the SWCP through visitors to accommodation within one mile of the coast in the four counties through which the SWCP passes. This calculation excluded group (hostel) accommodation and was based on the results for the four coastal corridors in section 3.1.

### 3.2.1 Basis of Approach

The basic method for calculating this global total was:

- First, to multiply on a district-by-district basis the economic value associated with all forms of accommodation provision (excluding the 'groups' category that deals with

low cost, non-serviced accommodation) with the percentage of all district accommodation providers within a one-mile cordon of the coastline.

- Second, on a district-by-district basis, to multiply this new figure by the percentage of annual visitors (i.e. as a surrogate for trips) derived purely from the SWCP (i.e. 27.60%).
- Third, a correction factor was also applied since, on average, the SWCP walkers' trips are shorter than those for all visitors (cf. section 3.1.3). Based on all the observations that inform the length of stay calculations for the four coastal corridors, an average length of trip for SWCP walkers in the four counties may be derived (2.69) as well as an average length of trip for all visitors (SWCP walkers and Non-SWCP walkers, 3.64). This produces a correction factor for the SW districts of 0.7389.
- Fourth, to add together the district values along the SWCP to derive an estimate of the total spend derived from the SWCP through visitors staying within one mile of the coast.

The economic value figures in the first stage are the total spend from staying trips. They are based on payment for accommodation and associated services, amenities and facilities. They are extracted from South West Tourism's survey of the economic value of tourism in the region. They are not money spent solely on the cost of accommodation, rather they provide total spend (economic value) associated with a trip.

The average proportion of visitors (i.e. trips) derived purely from the SWCP is used in the second stage instead of the average income derived purely from SWCP. To use visitors is more appropriate than income as it offers a clearer link to South West Tourism's economic value data in so far as it functions as a surrogate indicator of the average number of trips, and because South West Tourism's data relate to whole-trip spend.

There are variations in visitors such that, for instance, the effect of SWCP appears to be felt most keenly in the Lizard and Boscastle corridors relative to Sidmouth and Minehead corridors. For this reason, we have also calculated a set of upper and lower estimates for the economic value accrued from the SWCP. The upper limit is based on the mean visitors (i.e. trips), and hence value, derived from the SWCP for the two highest corridors (Lizard and Boscastle), while the lower limit is calculated from the averages (and value) for the two lowest corridors (Sidmouth and Minehead).

### 3.2.2 Factors Underpinning the Calculation

There were several factors underpinning the calculation of the total value derived from the SWCP:

- From the work on the coastal corridors we understand that on average 27.60% of stays or trips for accommodation providers in coastal corridors are derived purely from the SWCP.

- That the 'global' average from the four corridors for trips derived purely from the SWCP was representative and accurate for the entire extent of the SWCP.
- Notwithstanding, the average for the upper limit (based on the Lizard and Boscastle corridors) is 30.81%, while that for the lower limit (based on the Sidmouth and Minehead corridors) is 20.88%.
- All accommodation types except low-cost, non-serviced, 'group' accommodation were included from South West Tourism's economic value data.
- The values in the calculations presented pertain solely to spend associated with domestic or overseas staying trips within the 1-mile cordon (defined by the postcode zones).
- The figures come solely from questionnaire responses to the question 'What percentage of your visitors stay at your establishment purely because of its proximity to the South West Coast Path'.
- As a final note, SWCP National Trail approval has only recently (i.e. after the empirical stages of this research project were undertaken) been gained for a route around the Isle of Portland and through Weymouth. For this reason, the Borough was not included in the analysis presented below. The effect of the SWCP on accommodation providers there is yet to be established at this early time.

This means that:

- i. The results are a more powerful estimate of the economic value accrued from the SWCP than previous estimates because they incorporate total spend, not spend solely on accommodation. This is the reason why the average number of visitors/trips is a better indicator than average income.
- ii. The figures presented are likely to be underestimates of all economic value accrued from the SWCP. This is because they pertain to businesses solely within the 1-mile cordon and, undoubtedly, the SWCP has a value to businesses beyond the cordon.
- iii. The figures are likely to be an underestimate of total economic value. We asked for the proportion of visitors 'purely' because of proximity to the SWCP. The SWCP may also be a factor in attracting other visitors that are not quantified in this report.

### 3.2.3 Estimates of Values Derived Purely from the SWCP

Using the methods of calculation described in section 3.2.1, figures for each district have been worked out for each district (table 3).

#### **Example: East Devon**

The total value derived from all types of accommodation (excluding the groups category) within one mile of the coast in East Devon is £32,578,759. When this figure is multiplied by 27.60%, it yields the value derived purely as a result of the SWCP i.e. £8,991,737.

When this value is corrected for the shorter average stays of the SWCP walkers, the final value derived in East Devon as a result of the SWCP is £6,643,995. Given that there are variations in the contributions of the SWCP to the local economies along its 630 mile length and that the Sidmouth Corridor is part of the East Devon district, it may be instructive to apply the lower range threshold. This suggests that the value may, in fact, be a little lower, somewhere in the range of £6,643,995 to £5,026,327.

*Table 3. Estimated value derived purely from SWCP based on information from accommodation providers.*

| District       | Economic Value*     | Derived from SWCP†  | Upper Range         | Lower Range         |
|----------------|---------------------|---------------------|---------------------|---------------------|
| West Somerset  | £4,663,740          | £951,106            | £1,061,724          | £719,533            |
| West Dorset    | £28,197,525         | £5,750,502          | £6,419,310          | £4,350,380          |
| Torrige        | £14,377,400         | £2,932,075          | £3,273,088          | £2,218,179          |
| Torbay         | £132,130,134        | £26,946,144         | £30,080,098         | £20,385,344         |
| Teignbridge    | £8,621,831          | £1,758,305          | £1,962,804          | £1,330,196          |
| South Hams     | £12,270,034         | £2,502,306          | £2,793,336          | £1,893,049          |
| Restormel      | £115,208,705        | £23,495,249         | £26,227,848         | £17,774,666         |
| Penwith        | £71,353,531         | £14,551,582         | £16,243,995         | £11,008,588         |
| Plymouth       | £32,797,240         | £6,688,551          | £7,466,459          | £5,060,034          |
| North Devon    | £82,729,022         | £16,871,459         | £18,833,683         | £12,763,625         |
| North Cornwall | £42,046,144         | £8,574,739          | £9,572,019          | £6,486,977          |
| Kerrier        | £21,368,947         | £4,357,906          | £4,864,749          | £3,296,851          |
| East Devon     | £32,578,759         | £6,643,995          | £7,416,720          | £5,026,327          |
| Carrick        | £37,231,111         | £7,592,779          | £8,475,852          | £5,744,102          |
| Caradon        | £23,925,472         | £4,879,275          | £5,446,755          | £3,691,277          |
| Purbeck        | £5,737,772          | £1,170,141          | £1,306,233          | £885,237            |
| <b>Total</b>   | <b>£665,237,365</b> | <b>£135,666,113</b> | <b>£151,444,672</b> | <b>£102,634,364</b> |

\* Total economic value including domestic and overseas guests, but excluding group accommodation.

† Compensation Factor (0.7389) has also been applied to figures in this column to allow for shorter stays by SWCP users.

The highest values are accrued in Torbay, Restormel and North Devon. Restormel and Torbay districts have, by some margin, the largest values associated with the SWCP.

The principal reason for the high values is the concentration of accommodation in these destinations and the popularity of coast walks. Research undertaken in 2002 revealed that up to 23% of visitors to Newquay (Restormel) considered walking along the coast or cliffs an important component in their choice of destination. Similarly, in the Torbay 2000 Visitor Survey, 39% of all respondents had/or intended to go walking on the SWCP. In Brixham this extended to 47% of respondents.

### 3.3 The Economic Value for Low Cost, Non-serviced Accommodation (Hostels)

The aim of this component of the research was to understand the proportion of hostels' business activity that can be derived from the existence of SWCP. From the client, we understood that this was a sector in the four counties of the SWCP that relied upon, and reinforced, the use of the SWCP by tourists. Thus, our intention was to investigate in more detail the value accrued by this sector.

#### 3.3.1 The Characteristics of the Respondents

We received 22 responses to this survey, 19 (or 86.3%) of which described their location as coastal. 3 respondents described their location as rural. We have excluded these three responses from the subsequent analysis to be consistent with the calculations in sections 3.1 and 3.2.

18 respondents provided details of their bedspace capacity. The size of establishments ranged from 22 to 102 bedspaces. The average size of the establishments was 44.78 bedspaces.

#### 3.3.2 SWCP as a Selling Point for Local Hostels

For 79.0% of the respondents, the SWCP was seen as either a relatively important or huge selling point to their visitors. Indeed, 47.4% of the respondents recorded that the SWCP seems to be a huge selling point to most of their visitors.

#### 3.3.3 The Contribution of the SWCP to Income

The percentage of income for each hostel derived from those staying purely because of the SWCP is detailed in table 4. Two respondents declined to reply to this question.

Table 4. Percentage of annual income for hostels derived purely from SWCP

| % of business income | No. of Accommodation Providers | Percent |
|----------------------|--------------------------------|---------|
| Between 50 - 75%     | 4                              | 23.5    |
| Between 25 - 50%     | 3                              | 17.6    |
| Between 10 - 25%     | 4                              | 23.5    |
| Less than 10%        | 6                              | 35.3    |
| Total                | 17                             | 100.0   |

For 23.5% of hostels the SWCP contributed 50-75% of their income, while for 58.8% of the respondents the SWCP contributed a quarter or less.

On average, 27.2% of income was derived from those staying purely because of the SWCP.

### 3.3.4 The Contribution of the SWCP to Visitor Stays

The percentage of staying visitors for each hostel derived purely because of its proximity to the SWCP is detailed in table 5. All respondents answered this question.

*Table 5. Percentage of hostel visitors staying purely because of proximity to the SWCP*

| <u>% of visitors stays</u> | <u>No. of Hostels</u> | <u>Percent</u> |
|----------------------------|-----------------------|----------------|
| Between 50 – 75%           | 7                     | 36.8           |
| Between 25 – 50%           | 4                     | 21.1           |
| Fewer than 25%             | 8                     | 42.1           |
| Total                      | 19                    | 100.0          |

There is a big variation in the extent to which the benefits of the SWCP are reaped. For over a third (36.8%) of hostels, the SWCP contributes between 50-75% of visitor stays. In contrast, just over 40% of respondents noted that it contributed less than quarter.

On average, 36.18% of the respondents' visitors stay at these establishments purely due to its proximity to the SWCP.

### 3.3.5 Nature of Stays

The hostel managers were asked about the average night stay by both SWCP walkers and non-walkers. On average, SWCP walkers had shorter stays (2.46 nights) than non-walkers (3.80 nights). The average length of stay for all guests (SWCP walkers and Non-SWCP walkers) was 3.13 nights.

### 3.3.6 Total Value of SWCP from Visitors Staying in Hostels

As per sections 3.1 and 3.2, the total economic value derived purely from SWCP users staying in coastal hostels may be calculated.

The basis for the calculation is South West Tourism's estimate of total spend for the 'groups sector' (£41,727,000) in the four counties. The groups sector values comprise all non-serviced accommodation of the hostel type, including both independent establishments and YHA affiliated accommodation.

A compensation is made on a county-by-county basis to isolate the total trip spends associated with low-cost, non-serviced accommodation on the coast (against those inland). The adjusted subtotal is multiplied by the average visits derived purely from the SWCP (36.18%) as a proxy for the number of trips (Raw Value). Finally, as per the previous calculations, a second correction factor is applied to compensate for the lower average length of SWCP walkers' stays. Individual county correction factors are not derived because of the sample subset sizes. Instead, a SW correction factor is once more applied; simply put, this is a value for all four counties through which the SWCP passes, and it is applied one-by-one to each of the county results. It is the average length of SWCP walkers' visits divided by the length of stay for all visitors (2.46 nights for SWCP visits divided by 3.13 nights for all visitors, or 0.7859). The county totals are then

summed (table 6). Thus, in the four counties, the economic value derived as a result solely of the SWCP in hostels along the coast is estimated at £7,223,626.

*Table 6: Economic values for low-cost, non-serviced accommodation (hostels) derived purely from the SWCP.*

| <b>County</b> | <b>Value Groups (£)</b> | <b>% 'coastal'</b> | <b>Subtotal</b>   | <b>Raw Value</b> | <b>Final Value*</b> |
|---------------|-------------------------|--------------------|-------------------|------------------|---------------------|
| Cornwall      | 4,724,000               | 100.0              | 4,724,000         | 1,709,143        | 1,343,215           |
| Devon         | 17,309,000              | 62.50              | 10,818,125        | 3,913,998        | 3,076,011           |
| Dorset        | 8,634,000               | 100.0              | 8,634,000         | 3,123,781        | 2,454,979           |
| Somerset      | 11,060,000              | 11.11              | 1,228,888         | 444,612          | 349,421             |
| <b>Total</b>  | <b>41,727,000</b>       |                    | <b>25,405,013</b> | <b>9,191,534</b> | <b>7,223,626</b>    |

\* After final Correction Factor (0.7859) applied

### **3.4 'Global' Total Based on All Accommodation Providers**

Based on the two economic values calculated above the total spend generated by visitors to all types of accommodation (including hostels) purely as a result of the SWCP is in the order of £142,889,739.

## SECTION 4

# THE ECONOMIC VALUE DERIVED FROM SOUTH WEST RESIDENTS' USE OF THE SWCP

### PRINCIPAL FINDINGS

- The combined figures for all counties show an estimated 23 million SWCP walks taken each year by households in the four counties.
- This generates an estimated spend of **£116 million** by residents whilst using the SWCP.
- On around 2.6 million walks residents are accompanied by visiting friends and relatives (VFR).
- VFR walks bring an estimated 8.8 million visitors with an estimated additional spend of **£48 million**.

## **4.1 Introduction**

The aim of this component was to establish the level of usage of the SWCP amongst residents of Devon, Cornwall, Dorset and Somerset, and to establish average spending patterns amongst these residents whilst using the SWCP.

## **4.2 Profile of Respondents**

### 4.2.1 Gender Profile of the Respondents

Of those interviewed, 43% were male and 57% were female.

### 4.2.2 Age Profile of the Respondents

Table 7 details the demographic breakdown of the respondents. The majority of respondents were over 55 years old, while nearly a quarter was aged 45-55 years old. As far as published sources allow, our sample was comparatively old. However, we interpret this as a function of the sampling procedure and who was willing to be interviewed for the research (see below).

### 4.2.3 Employment Status of Individual Respondents

Table 8 details the employment status of the respondents. The sample was dominated by those working full-time (nearly a half of the sample), and those who had retired (42%).

Table 7. Age categories of respondents by county and compared with the whole South West region

| Age         | Somerset  | Devon      | Cornwall   | Dorset     | Total      | South West*        |
|-------------|-----------|------------|------------|------------|------------|--------------------|
| 56+ years   | 54%       | 48%        | 56%        | 60%        | 54%        | -                  |
| 45-55 years | 24%       | 31%        | 23%        | 18%        | 24%        | ≥45 years<br>44%   |
| 35-44 years | 18%       | 17%        | 15%        | 11%        | 15%        | -                  |
| 20-34 years | 5%        | 3%         | 5%         | 11%        | 6%         | 20-44 years<br>33% |
| 16-19 years | -         | 1%         | 1%         | -          | ≈0%        | 4.7%               |
| Total       | 100% (80) | 100% (119) | 100% (110) | 100% (107) | 100% (416) | -                  |

\*ONS, 2002 (note regional analysis includes proportions of children, under 16 (20%)). The ONS data has conflated age categories which make comparison with our sample awkward.

Table 8: Working status of respondents by county, and compared with the whole South West region.

| Working status         | Somerset  | Devon      | Cornwall   | Dorset     | Total      | S W*  |
|------------------------|-----------|------------|------------|------------|------------|-------|
| Economically active    | 56%       | 62%        | 55%        | 50%        | 56%        | 81.7% |
| Working full time      | 51%       | 51%        | 47%        | 47%        | 49%        | -     |
| part time              | 5%        | 11%        | 8%         | 3%         | 7%         | -     |
| Retired                | 44%       | 35%        | 44%        | 47%        | 42%        | -     |
| Full time education    | -         | -          | -          | 1%         | 0%         | 6.7%  |
| Unemployed             | -         | 3%         | 1%         | 1%         | 1%         | 3.6%  |
| Not in paid employment | -         | -          | -          | 2%         | <1%        | -     |
| Total                  | 80 (100%) | 100% (119) | 110 (100%) | 100% (107) | 416 (100%) |       |

\*ONS, 2002

#### 4.2.4 Sample set bias

The profile of the sample selected cannot necessarily be that of the background population (cf. tables 7 and 8). This is, first, a function of the procedure used to select the 1,200 representative households and the subsequent random sample of 416 respondents. Secondly, it is because of respondent availability and their willingness to be interviewed on the day.

Simple random sampling is easy to accomplish and because it is a fair way to select a sample, it is reasonable to generalise the results from the sample back to the population. However, simple random sampling is not the most statistically efficient method of

sampling and you may, just because of the luck of the draw, not get good representation of subgroups in a population.

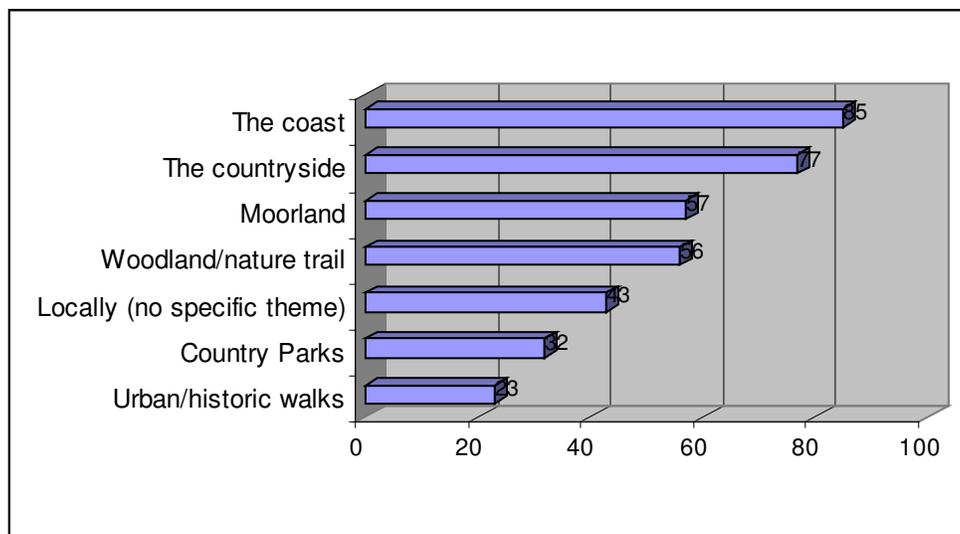
Moreover, in the interviewing stage, and despite all efforts being made to allow potential respondents to answer, circumstances can contrive to bias the sample. For example, households with answering machines may screen calls, families with children may be otherwise engaged and fair weather encourages households and individuals to go out. In essence, the interviewing process cannot ensure that all households that should be in the sample are in the sample, and the group actually interviewed must be seen as a sub-sample of the sample

### 4.3 SWCP as a Setting for Walks

#### 4.3.1 The Location of Walks

The research indicates that, overall, 84% of households take walks for leisure purposes. Of this 84%, figure 4 indicates that (a subset of) 85% like to walk along the coast.

Figure 4. The location where respondents who go for leisure walks enjoyed walking (% respondents)



#### 4.3.2 The Frequency of Walking on the SWCP

On average, in the four counties through which the SWCP runs, each household that takes coast walks makes 30 such walks per year. In the case of households in Cornwall, the average number exceeds 50 (table 9).

Table 9. Average number of walks on coast taken per year by those who take coast walks.

| <u>County of Residence.</u>  | <u>Average number of SWCP walks</u> |
|------------------------------|-------------------------------------|
| Somerset                     | 17                                  |
| Devon                        | 22                                  |
| Cornwall                     | 51                                  |
| Dorset                       | 25                                  |
| <b>All Counties Combined</b> | <b>30</b>                           |

#### 4.4 The Importance of Visiting Friends and Relatives (VFR)

- Of the total number of SWCP walks, 12.5% were taken in the company of friends and relatives visiting the area.
- These coastal walks contained an average of 3.37 persons in a visitor group.
- The largest proportion of coastal walks taken with VFR is in Somerset. 17.9% of these walks are attributed to entertaining visiting friends and relatives (table 10).

Table 10: County-by-county profile of SWCP use

|                          | <u>Average number of SWCP walks</u> | <u>Proportion of walks with VFR (%)</u> | <u>Average group size</u> | <u>Walks with VFR</u> | <u>Additional walkers (VFR)</u> |
|--------------------------|-------------------------------------|---|---------------------------|-----------------------|---------------------------------|
| Somerset                 | 17                                  | 17.7%                                   | 3.5                       | 419,297               | 1,467,541                       |
| Devon                    | 22                                  | 14.3%                                   | 3                         | 989,656               | 2,968,969                       |
| Cornwall                 | 51                                  | 7.9%                                    | 3.4                       | 629,303               | 2,202,561                       |
| Dorset                   | 25                                  | 10.8%                                   | 3.5                       | 610,614               | 2,137,150                       |
| <b>Counties Combined</b> | <b>30</b>                           | <b>12.5%</b>                            | <b>3.37</b>               | <b>2,648,870</b>      | <b>8,776,221</b>                |

#### 4.5 THE ECONOMIC IMPLICATIONS OF THE SWCP

##### 4.5.1 Spending on Specific Items

Respondents were asked 'what types of items might you spend money on during a walk that includes the coastline?' (Appendix 6). 89% spent money on food and drink, 50% on travel and transport, while just 4% mentioned shopping and 2% entertainment.

##### 4.5.2 Average Spend on Coastal Walks

Respondents were also asked how much, on average, they spent during a SWCP walk. The results are shown in table 11.

Table 11: How much was typically spent by day visitors whilst using the SWCP?

| Location of Household | Average Spend (£) |
|-----------------------|-------------------|
| Somerset              | 9.00              |
| Devon                 | 5.94              |
| Cornwall              | 3.13              |
| Dorset                | 4.74              |
| <b>Combined</b>       | <b>5.45</b>       |

#### 4.6 Volume and Value of the SWCP

From the sample data, several straightforward calculations were made to extrapolate the volume and value of the SWCP in total across the four counties, and to estimate its value to the local economy (figure 5 and table 12).

The number of households in each of the four counties was obtained from the census (H). The proportion of households taking leisure walks was ascertained from the data (HL). The proportion of households taking coastal walks from those taking leisure walks was then calculated (HC). The number of walks by residents of each county (W) was calculated by multiplying the number of households taking coastal walks with the number of coastal walks in a year. Value (V) was calculated from the number of walks, which differs by county, by multiplying average spend at the destination (S).

$$((H/HL)/(HC*W))*S=V$$

##### Example: Devon Residents

There are an estimated 461,000 households resident in Devon (H). The proportion of Devon households that walk for leisure purposes (HL) is 82% giving a subset of 378,020 households. Of this subset, 85% walk on the SWCP (HC) giving a subset of 321,317 households taking coastal walks. This final subset is multiplied by the average number of coast walks taken by Devon households who say they walk on the coast (22). Thus the total number of coast walks taken by Devon residents in a year is estimated as 7,068,974.

In order to estimate the value of these walks in the destination, we simply multiply the number of walks by the estimated spend of Devon households (£5.94). Thus the total value of Devon households' usage of the SWCP is estimated at £41,989,706.

The main results are presented below and are based on household data.

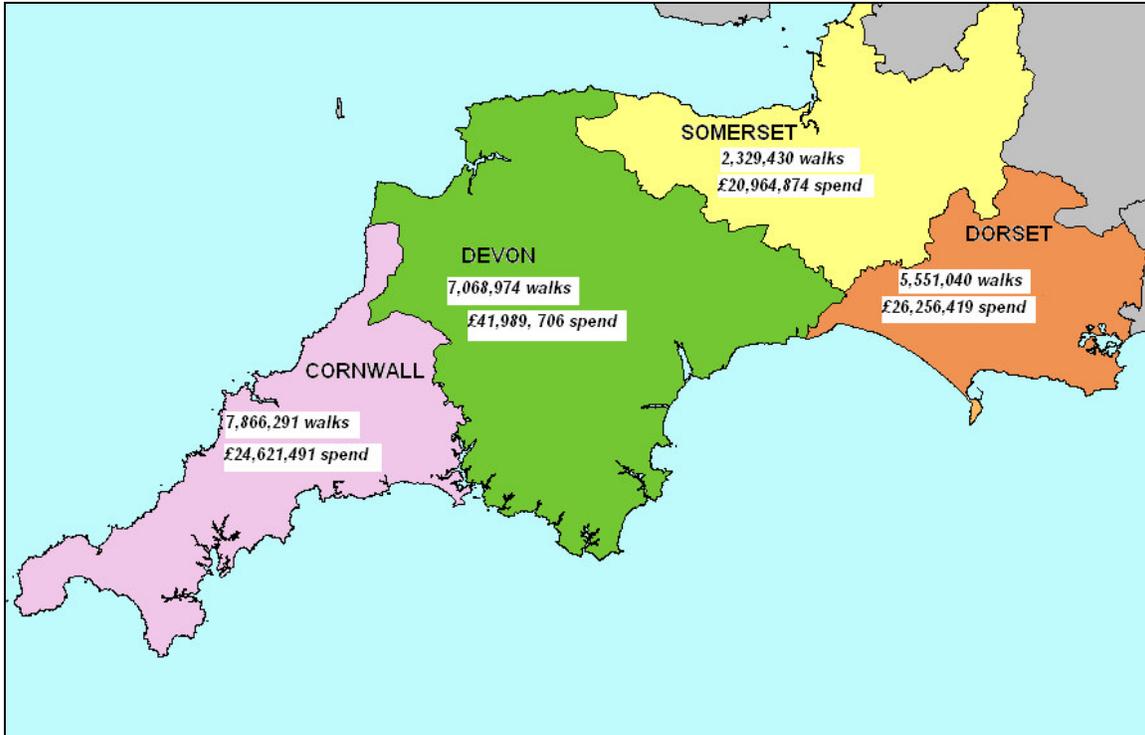
##### 4.6.1 Top Lines for Volume and Value based on Residents Research.

- The combined figures for all counties show an estimated **23 million** walks taken each year by households in the four counties.
- This generates an estimated spend of **£116 million** by residents whilst using the SWCP.

- Of the 23 million total walks an estimated **2.6 million** are used to entertain visiting friends and relatives (VFR).
- These walks bring an estimated **8.8 million** visitors with an estimated additional spend of **£48 million**.

#### 4.6.2 Inter-county Variations in Volume and Value

Figure 5. Volume and value of residents' walks along the SWCP by county of residence.



#### 4.6.3 Summary of Volume and Value for Households.

Table 12 summaries the volume and value for households derived from their usage of the SWCP.

Table 12. Inter-county variations in volume and value in detail

| General                               | Somerset   | Devon      | Cornwall   | Dorset     | Total       |
|---------------------------------------|------------|------------|------------|------------|-------------|
| Coast Walking Households              | 145,589    | 321,317    | 154,241    | 222,042    | 843,189     |
| Coast Walks                           | 2,329,430  | 7,068,974  | 7,866,291  | 5,551,040  | 22,815,735  |
| Spend (£)                             | 20,964,874 | 41,989,706 | 26,621,491 | 26,256,419 | 115,832,490 |
| <b>Visiting Friends and Relatives</b> |            |            |            |            |             |
| Coast walks with VFR guests           | 419,297    | 989,656    | 629,303    | 610,614    | 2,648,870   |
| Total walkers                         | 1,467,541  | 2,968,969  | 2,202,561  | 2,137,150  | 8,776,221   |
| Average visitor group size*           | 3.5        | 3          | 3.4        | 3.5        | 3.37        |
| Spend (£)                             | 13,207,870 | 17,635,676 | 6,894,017  | 10,108,721 | 47,846,284  |
| Total Resident and VFR spend (£)      | 34,172,744 | 59,625,382 | 33,515,508 | 36,365,140 | 163,678,774 |

\* Average visitor group size is an average of estimated VFR group size provided by respondents, and calculated at a county level.

APPENDIX 1: QUESTIONNAIRE TO ACCOMMODATION PROVIDERS IN FOUR  
COASTAL CORRIDORS

## **South West Coast Path Silver Jubilee - 2003**

***Hello!***

2003 is the Silver Jubilee anniversary of the South West Coast Path, and to mark the occasion, a research project is being conducted to assess the current use and impact of the National Trail. This exercise will not only be a fitting way to mark the 25<sup>th</sup> anniversary, it will also provide key economic facts and figures for use during the year's PR and media campaign.

The research consists of four components ('snapshots'), and whilst this is not a formalised economic impact study, each 'snapshot' will provide specific information (useful in itself) that when taken together will paint a full picture of the impact of the Coast Path on existing tourism businesses (i.e. you) and the local community.

Whilst we are fully aware that the Coast Path does not run through your area, we have chosen West Devon to be included as well, to provide a comparison with the coastal areas in the survey.

The University of Exeter and South West Tourism are undertaking this research on behalf of the South West Coast Path Team. The research is being funded by the Countryside Agency and the South West Regional Development Agency.

***So, what do we want you to do?***

Enclosed, you will find a short questionnaire, which is to be completed and sent back in the pre-paid envelope provided. The questionnaires are ***confidential*** – at no point will any of your details be used or passed on to other agencies. The results of this research really are going to be used in the future, and we can't assess the impact of the trail, unless we communicate with businesses such as yours. We are hoping for a ***100% response rate!***

Your views really do matter, so please take a couple of moments and send the completed questionnaire back to us before the ***17<sup>th</sup> February 2003***. If you find it easier to fax the questionnaire back to us, then please do so – the fax number is (01392) 263342.

Many thanks!

*N.B. The South West Coast Path is referred to as 'SWCP' within the following questionnaire*

**South West Coast Path Silver Jubilee - 2003**

|  |  |  |
|--|--|--|
| <b>1. What main type of tourism business do you manage/run? (Please tick one box)</b>  |  |  |
| <input type="checkbox"/> Hostel  | <input type="checkbox"/> Self-catering flats/apartments etc. |  |
| <input type="checkbox"/> Guest House (no breakfast)  | <input type="checkbox"/> Hotel                               |  |
| <input type="checkbox"/> Bed and Breakfast   | <input type="checkbox"/> Holiday/caravan park                |  |
| <b>2. How many beds does your establishment have?</b>  |  |  |
| ..... beds   |  |  |
| <b>3. How many customers stayed in your establishment during 2002? (If figures are unavailable or unrepresentative following Foot and Mouth, please use most recent)</b>   |  |  |
| ..... guests   |  |  |
| <b>4. How would you describe the location of your business? (Please tick one)</b>  |  |  |
| <input type="checkbox"/> Coastal   | <input type="checkbox"/> Rural                               |  |
| <input type="checkbox"/> Moor  | <input type="checkbox"/> Other (please specify)              |  |
| <input type="checkbox"/> Town  | .....  |  |
| <b>5. How do most of your guests find out about your establishment? (Tick all that apply)</b>  |  |  |
| <input type="checkbox"/> Advertisements in local press   | <input type="checkbox"/> Word of mouth                       |  |
| <input type="checkbox"/> Advertisement in national press   | <input type="checkbox"/> Internet                            |  |
| <input type="checkbox"/> Hostel Guidebook  | <input type="checkbox"/> Holiday brochure/guidebook          |  |
| <input type="checkbox"/> SWCP Guidebook  | <input type="checkbox"/> Other                               |  |
| <b>6. Which of the following activities do your customers take part in, whilst staying at your establishment? (Please enter the two most popular activities; '1' for most popular, '2' for second most popular).</b> |  |  |
| <input type="checkbox"/> Water and Beach activities  | <input type="checkbox"/> Visiting towns and villages         |  |
| <input type="checkbox"/> Walks anywhere (i.e. moors, countryside etc.)   | <input type="checkbox"/> Visiting local attractions          |  |
| <input type="checkbox"/> Walks along the SWCP  | <input type="checkbox"/> Shopping                            |  |
| <input type="checkbox"/> Other outdoor activities  | <input type="checkbox"/> Other (please specify)              |  |
|  | .....  |  |
|  | .....  |  |
| <b>7. How important would you say the close proximity of the South West Coast Path is, in attracting visitors to your establishment? (Please tick one box)</b>   |  |  |
| <input type="checkbox"/> "It seems to be a huge selling point for most of our visitors"  |  |  |
| <input type="checkbox"/> "It is of relative importance to many of our visitors"  |  |  |
| <input type="checkbox"/> "It is neither important or unimportant to the majority of our visitors"  |  |  |
| <input type="checkbox"/> "It is not very important to many of our visitors"  |  |  |
| <input type="checkbox"/> "Very few of our visitors know about it"  |  |  |

|   |   |  |
|---|---|--|
| <b>8. Approximately, what percentage of your annual visitors stay at your establishment purely because of its proximity to the South West Coast Path? (Please tick one box)</b>   |   |  |
| <input type="checkbox"/> Fewer than 25%   | <input type="checkbox"/> Between 50% and 75%  |  |
| <input type="checkbox"/> Between 25% and 50%  | <input type="checkbox"/> Between 75% and 100%   |  |
| <b>9. In your opinion, why do you think visitors choose the location of your establishment? (Please tick all that apply)</b>  |   |  |
| <input type="checkbox"/> Like the area  | <input type="checkbox"/> Good walking in the area                                     |  |
| <input type="checkbox"/> Plenty to do in the area   | <input type="checkbox"/> Good for other outdoor activities                            |  |
| <input type="checkbox"/> Reasonable Price   | <input type="checkbox"/> Other (please specify)                                       |  |
| <input type="checkbox"/> Proximity to the SWCP  | .....   |  |
| <b>10. Approximately, what percentage of your annual income comes from people using your establishment purely because of its proximity to the South West Coast Path? (I.e. those who only stay there because of the coast path) (Please tick one box)</b> |   |  |
| <input type="checkbox"/> Less than 10%  | <input type="checkbox"/> Between 50% and 75%  |  |
| <input type="checkbox"/> Between 10% and 25%  | <input type="checkbox"/> Between 75% and 90%  |  |
| <input type="checkbox"/> Between 25% and 50%  | <input type="checkbox"/> Between 90% and 100%   |  |
| <b>11. How much is a double room in your establishment, for one night, in the peak summer season? (July/Aug)</b>  |   |  |
| It would cost £..... per person/per room  |   |  |
| <b>12. On average, how long do those who go for walks along the South West Coast Path stay in your establishment, compared with those who don't?</b>  |   |  |
| SWCP walkers: ..... nights      Non-SWCP walkers: ..... nights  |   |  |
| <b>13. What are your first and second most important market segments? (Please enter '1' for most important, and '2' for second most important)</b>  |   |  |
| <b>Domestic visitors</b>  | <b>International visitors</b>   |  |
| <input type="checkbox"/> Under 25s, no children   | <input type="checkbox"/> European Independent couples 25-39                           |  |
| <input type="checkbox"/> Family groups with young children  | <input type="checkbox"/> European empty nesters 40-65                                 |  |
| <input type="checkbox"/> Family groups with older children  | <input type="checkbox"/> North American couples 45-64                                 |  |
| <input type="checkbox"/> Under 40s, no children   | <input type="checkbox"/> A combination of all   |  |
| <input type="checkbox"/> Empty nesters (i.e. older couples 40-60) whose children have left home   | <input type="checkbox"/> A different international visitor type (Please specify)..... |  |
| <input type="checkbox"/> Retired people (60 +)  | .....   |  |
| <input type="checkbox"/> Educational / school groups  | <input type="checkbox"/> None of the above  |  |
| <b>14. In general how long in advance do visitors book to stay in your establishment?</b>   |   |  |
| ..... months / weeks / days (Delete as appropriate)   |   |  |
| <b>15. Do those who specifically come to use the South West Coast Path tend to be:</b>  |   |  |
| <input type="checkbox"/> Repeat trade   | <input type="checkbox"/> First time guests  |  |

|   |  |
|---|--|
| <b>16. How would the closure of the SWCP affect your annual bookings? (Please tick one)</b>   |  |
| <input type="checkbox"/> It would have no noticeable effect on our bookings<br><input type="checkbox"/> It would have some limited negative effect on our bookings<br><input type="checkbox"/> Our business would suffer dramatically as a result of its closure<br><input type="checkbox"/> Don't know   |  |
| <b>17. How did Foot and Mouth disease in the South West (2001) affect your trade? (Please tick one)</b>   |  |
| <input type="checkbox"/> Bookings declined greatly during the foot and mouth outbreak<br><input type="checkbox"/> Bookings declined a little during the foot and mouth outbreak<br><input type="checkbox"/> Bookings stayed the same during the foot and mouth outbreak<br><input type="checkbox"/> Bookings increased a little during the foot and mouth outbreak<br><input type="checkbox"/> Bookings increased greatly during the foot and mouth outbreak<br><input type="checkbox"/> Don't know |  |
| <b>18. Is there anything that you would like to mention, specifically about the value of the South West Coast Path to your business?</b>  |  |
| .....<br>.....<br>.....<br>.....<br>.....   |  |

**Thank you very much for taking the time and trouble to complete this questionnaire.**

**We may wish to follow some of your answers up with a telephone call at a later date. If you give permission for us to do this, please leave your telephone number in the space below, along with a suitable time to contact you on a weekday, and the name of somebody to speak to.**

**Tel:** \_\_\_\_\_ **Suitable time:** \_\_\_\_\_

**Contact name:** \_\_\_\_\_

APPENDIX 2: THE TOTAL CORRIDOR VALUES USED TO DERIVE THE VALUE ASSOCIATED WITH THE SWCP IN THE FOUR COASTAL CORRIDORS.

Source: South West Tourism

**Minehead to Somerset/Devon Boundary**  
2001

| Overall Accommodation supply  |                | Total Type District Value | Corridor Supply | % of District Supply in Corridor | Type Corridor Value | Type Raw SWCP Value* |
|---|----------------|---------------------------|-----------------|----------------------------------|---------------------|----------------------|
| Hotels  | 1367 bedspaces |                           |                 |                                  |                     |                      |
| Guesthouses   | 624 bedspaces  |                           |                 |                                  |                     |                      |
| Inns  | 192 bedspaces  |                           |                 |                                  |                     |                      |
| B&B   | 516 bedspaces  |                           |                 |                                  |                     |                      |
| Farms   | 162 bedspaces  |                           |                 |                                  |                     |                      |
| <b>Serviced</b>   | <b>2861</b>    | <b>£31,243,000</b>        | <b>113</b>      | <b>3.949667948</b>               | <b>£1,233,995</b>   | <b>£242,357</b>      |
| Self catering   | 2575 units     |                           |                 |                                  |                     |                      |
| <b>Self-catering</b>  | <b>2575</b>    | <b>£21,380,000</b>        | <b>62</b>       | <b>2.40776699</b>                | <b>£514,781</b>     | <b>£101,103</b>      |
| Touring caravans/tents  | 1199 pitches   |                           |                 |                                  |                     |                      |
| Static vans   | 1958 pitches   |                           |                 |                                  |                     |                      |
| Holiday centres   | 0 units        |                           |                 |                                  |                     |                      |
| <b>Centres/Caravans/ Camping</b>  | <b>3157</b>    | <b>£52,264,000</b>        | <b>0</b>        | <b>0</b>                         |                     | <b>£0</b>            |
| Group accommodation   | 262 bedspaces  |                           |                 |                                  |                     |                      |
| Campus  | 0 bedspaces    |                           |                 |                                  |                     |                      |
| <b>Group accommodation</b>  | <b>262</b>     |                           | <b>0</b>        | <b>0</b>                         |                     | <b>£0</b>            |
| Second homes  | 366 units      |                           |                 |                                  |                     |                      |
| Marinas   | 110 berths     |                           |                 |                                  |                     |                      |
| <i>Units at Butlin's have been included in the self catering total.</i> |                |                           |                 |                                  |                     |                      |
| <b>TOTAL</b>  |                |                           |                 |                                  | <b>£1,748,775</b>   | <b>£343,459</b>      |

\* No correction factor applied for length of stay on this table – see table 2 for correction factor

## Boscastle to Cornwall/Devon Boundary

2001

| Overall Accommodation supply    |                | Total Type District Value | Corridor Supply | % of District Supply in Corridor | Type Corridor Value | Type Raw SWCP Value* |
|---------------------------------|----------------|---------------------------|-----------------|----------------------------------|---------------------|----------------------|
| Hotels                          | 2677 bedspaces |                           |                 |                                  |                     |                      |
| Guesthouses                     | 547 bedspaces  |                           |                 |                                  |                     |                      |
| Inns                            | 277 bedspaces  |                           |                 |                                  |                     |                      |
| B&B                             | 597 bedspaces  |                           |                 |                                  |                     |                      |
| Farms                           | 302 bedspaces  |                           |                 |                                  |                     |                      |
| <b>Serviced</b>                 | <b>4400</b>    | <b>£54,643,000</b>        | <b>511</b>      | <b>11.6</b>                      | <b>£6,346,039</b>   | <b>£1,618,240</b>    |
| Self catering                   | 2284 units     |                           |                 |                                  |                     |                      |
| <b>Self-catering</b>            | <b>2284</b>    | <b>£84,115,000</b>        | <b>173</b>      | <b>7.6</b>                       | <b>£6,371,232</b>   | <b>£1,624,664</b>    |
| Touring caravans/tents          | 4418 pitches   |                           |                 |                                  |                     |                      |
| Static vans                     | 3021 pitches   |                           |                 |                                  |                     |                      |
| Holiday centres                 | 0 units        |                           |                 |                                  |                     |                      |
| <b>Centres/Caravans/Camping</b> | <b>7439</b>    | <b>£36,720,000</b>        | <b>233</b>      | <b>3.1</b>                       | <b>£1,150,122</b>   | <b>£293,281</b>      |
| Group accommodation             | 538 bedspaces  |                           |                 |                                  |                     |                      |
| Campus                          | 0 bedspaces    |                           |                 |                                  |                     |                      |
| <b>Group accommodation</b>      | <b>538</b>     |                           |                 |                                  |                     |                      |
| Second homes                    | 1097 units     |                           |                 |                                  |                     |                      |
| Marinas                         | 190 berths     |                           |                 |                                  |                     |                      |
| <b>TOTAL</b>                    |                |                           |                 |                                  | <b>£13,867,394</b>  | <b>£3,536,186</b>    |

\* No correction factor applied for length of stay on this table – see table 2 for correction factor

## The Lizard Peninsula Corridor in Cornwall 2001

| Overall Accommodation supply    |                | Total Type District Value | Corridor Supply | % of District Supply in Corridor | Type Corridor Value | Type Raw SWCP Value* |
|---------------------------------|----------------|---------------------------|-----------------|----------------------------------|---------------------|----------------------|
| Hotels                          | 1012 bedspaces |                           |                 |                                  |                     |                      |
| Guesthouses                     | 345 bedspaces  |                           |                 |                                  |                     |                      |
| Inns                            | 97 bedspaces   |                           |                 |                                  |                     |                      |
| B&B                             | 144 bedspaces  |                           |                 |                                  |                     |                      |
| Farms                           | 130 bedspaces  |                           |                 |                                  |                     |                      |
| <b>Serviced</b>                 | <b>1728</b>    | £16,254,000               | <b>840</b>      | <b>48.6</b>                      | <b>£7,901,250</b>   | <b>£2,853,141</b>    |
| Self catering                   | 784 units      |                           |                 |                                  |                     |                      |
| <b>Self-catering</b>            | <b>784</b>     | £28,873,000               | <b>293</b>      | <b>37.4</b>                      | <b>£10,790,547</b>  | <b>£3,896,467</b>    |
| Touring caravans/tents          | 1377 pitches   |                           |                 |                                  |                     |                      |
| Static vans                     | 1063 pitches   |                           |                 |                                  |                     |                      |
| Holiday centres                 | 0 units        |                           |                 |                                  |                     |                      |
| <b>Centres/Caravans/Camping</b> | <b>2440</b>    | £12,921,000               | <b>500</b>      | <b>20.5</b>                      | <b>£2,647,746</b>   | <b>£956,101</b>      |
| Group accommodation             | 37 bedspaces   |                           |                 |                                  |                     |                      |
| Campus                          | 0 bedspaces    |                           |                 |                                  |                     |                      |
| <b>Group accommodation</b>      | <b>37</b>      |                           |                 |                                  |                     |                      |
| Second homes                    | 475 units      |                           |                 |                                  |                     |                      |
| Marinas                         | 200 berths     |                           |                 |                                  |                     |                      |
| <b>TOTAL</b>                    |                |                           |                 |                                  | <b>£21,339,543</b>  | <b>£7,705,709</b>    |

\* No correction factor applied for length of stay on this table – see table 2 for correction factor

## Sidmouth to Bridport (Devon only – see also page 43)

2001

| Overall Accommodation supply    |                | Total Type District Value | Corridor Supply | % of District Supply in Corridor | Type Corridor Value | Type Raw SWCP Value* |
|---------------------------------|----------------|---------------------------|-----------------|----------------------------------|---------------------|----------------------|
| Hotels                          | 4196 bedspaces |                           |                 |                                  |                     |                      |
| Guesthouses                     | 800 bedspaces  |                           |                 |                                  |                     |                      |
| Inns                            | 186 bedspaces  |                           |                 |                                  |                     |                      |
| B&B                             | 468 bedspaces  |                           |                 |                                  |                     |                      |
| Farms                           | 330 bedspaces  |                           |                 |                                  |                     |                      |
| <b>Serviced</b>                 | <b>5980</b>    | £50,037,000               | <b>812</b>      | <b>13.6</b>                      | <b>£6,794,322</b>   | <b>£1,502,904</b>    |
| Self catering                   | 931 units      |                           |                 |                                  |                     |                      |
| <b>Self-catering</b>            | <b>931</b>     | £28,781,000               | <b>128</b>      | <b>13.7</b>                      | <b>£3,957,001</b>   | <b>£875,289</b>      |
| Touring caravans/tents          | 2661 pitches   |                           |                 |                                  |                     |                      |
| Static vans                     | 3287 pitches   |                           |                 |                                  |                     |                      |
| Holiday centres                 | 265 units      |                           |                 |                                  |                     |                      |
| <b>Centres/Caravans/Camping</b> | <b>6213</b>    | £35,516,000               | <b>774</b>      | <b>12.5</b>                      | <b>£4,424,494</b>   | <b>£978,698</b>      |
| Group accommodation             | 40 bedspaces   |                           |                 |                                  |                     |                      |
| Campus                          | 0 bedspaces    |                           |                 |                                  |                     |                      |
| <b>Group accommodation</b>      | <b>40</b>      |                           |                 |                                  |                     |                      |
| Second homes                    | 867 units      |                           |                 |                                  |                     |                      |
| Marinas                         | 670 berths     |                           |                 |                                  |                     |                      |
| <b>TOTAL</b>                    |                |                           |                 |                                  | <b>£15,175,817</b>  | <b>£3,356,891</b>    |

\* No correction factor applied for length of stay on this table – see table 2 for correction factor

## Sidmouth to Bridport (Dorset only – see also page 42)

2001

| Overall Accommodation supply    |                | Total Type District Value | Corridor Supply | % of District Supply in Corridor | Type Corridor Value | Type Raw SWCP Value* |
|---------------------------------|----------------|---------------------------|-----------------|----------------------------------|---------------------|----------------------|
| Hotels                          | 1320 bedspaces |                           |                 |                                  |                     |                      |
| Guesthouses                     | 471 bedspaces  |                           |                 |                                  |                     |                      |
| Inns                            | 259 bedspaces  |                           |                 |                                  |                     |                      |
| B&B                             | 1030 bedspaces |                           |                 |                                  |                     |                      |
| Farms                           | 226 bedspaces  |                           |                 |                                  |                     |                      |
| <b>Serviced</b>                 | <b>3306</b>    | £31,953,000               | <b>347</b>      | <b>10.49606776</b>               | <b>£3,353,809</b>   | <b>£741,862</b>      |
| Self catering                   | 839 units      |                           |                 |                                  |                     |                      |
| <b>Self Catering</b>            | <b>839</b>     | £20,286,000               | <b>104</b>      | <b>12.39570918</b>               | <b>£2,514,594</b>   | <b>£556,228</b>      |
|                                 |                |                           |                 |                                  |                     |                      |
| Touring caravans/tents          | 3451 pitches   |                           |                 |                                  |                     |                      |
| Static vans                     | 2048 pitches   |                           |                 |                                  |                     |                      |
| Holiday centres                 | 0 units        |                           |                 |                                  |                     |                      |
| <b>Centres/Caravans/Camping</b> | <b>5499</b>    | £15,181,000               | <b>149</b>      | <b>2.709583561</b>               | <b>£411,342</b>     | <b>£90,989</b>       |
|                                 |                |                           |                 |                                  |                     |                      |
| Group accommodation             | 258 bedspaces  |                           |                 |                                  |                     |                      |
| Campus                          | 0 bedspaces    |                           |                 |                                  |                     |                      |
| <b>Group accommodation</b>      | <b>258</b>     |                           |                 |                                  |                     |                      |
| Second homes                    | 875 units      |                           |                 |                                  |                     |                      |
| Marinas                         | 100 berths     |                           |                 |                                  |                     |                      |
|                                 |                |                           |                 |                                  |                     |                      |
| <b>TOTAL</b>                    |                |                           |                 |                                  | <b>£6,279,744</b>   | <b>£1,389,079</b>    |

\* No correction factor applied for length of stay on this table – see table 2 for correction factor

APPENDIX 3: ADDENDARY INFORMATION DERIVED FROM THE QUESTIONNAIRE TO ACCOMMODATION PROVIDERS IN FOUR COASTAL CORRIDORS NOT OTHERWISE CONTAINED WITHIN THE MAIN REPORT.

**Information About Accommodation Providers**

263 responses were received (average of 2.6 per respondent) to the question ‘How do most of your guests find out about your establishment?’. The answers were:

| Source                           | Number | % of Responses |
|----------------------------------|--------|----------------|
| Holiday brochure/guidebook       | 80     | 79.2           |
| Internet                         | 68     | 67.3           |
| Word of mouth                    | 58     | 57.4           |
| Other                            | 20     | 19.8           |
| Advertisements in national press | 19     | 18.8           |
| SWCP Guidebook                   | 10     | 9.9            |
| Advertisements in local press    | 8      | 7.9            |

**Activities Undertaken by Visitors Using the Accommodation Providers**

308 responses were received (average of 3.1 per respondent) to the question ‘Which of the following activities do your customers take part in, whilst staying at your establishment?’.

| Activity                                 | Number | % of Respondents |
|--|--------|------------------|
| Walks anywhere (moors, countryside etc.) | 67     | 66.3             |
| Walks along the SWCP                     | 58     | 57.4             |
| Water and beach activities               | 55     | 54.5             |
| Visiting towns and villages              | 50     | 49.5             |
| Visiting local attractions               | 49     | 48.5             |
| Other outdoor activities                 | 16     | 15.8             |
| Shopping                                 | 12     | 11.9             |
| Other (non-specified)                    | 1      | 1.0              |

**Reasons Why Visitors Chose Location of Establishment**

313 responses were received (average of 3.1 per respondent) to the question ‘In your opinion, why do you think visitors choose the location of your establishment?’. The answers were:

| Reason                            | Number | % of Respondents |
|-----------------------------------|--------|------------------|
| Like the area                     | 94     | 93.1             |
| Good walking in the area          | 59     | 58.4             |
| Reasonable price                  | 58     | 57.4             |
| Proximity to the SWCP             | 41     | 40.6             |
| Good for other outdoor activities | 28     | 27.7             |
| Plenty to do in the area          | 27     | 26.7             |
| Others (non-specified)            | 6      | 5.9              |

### Cost of Double Room Per Night in Peak Summer Season (July/August)

72 responses were received to the question 'How much is a double room in your establishment, for one night, in the peak summer season (July/August)?'. The mean was £41.84 (standard deviation of £24.19). Prices ranged from £5 to £129.

### Market Segments

164 responses were received to the question 'What are the first and second most important market segments?'. Nine respondents chose not to answer this question. The data were:

| Segment   | Number | % of Respondents |
|---|--------|------------------|
| DOMESTIC - Under 25s, no children   | 2      | 2.2              |
| DOMESTIC - Family groups with young children                                      | 7      | 7.6              |
| DOMESTIC - Family groups with older children                                      | 17     | 18.5             |
| DOMESTIC - Under 40s, no children   | 12     | 13.0             |
| DOMESTIC - Empty nesters (i.e. older couples 40-60) whose children have left home | 49     | 53.3             |
| DOMESTIC - Retired people (60+)   | 27     | 29.3             |
| DOMESTIC - Educational / school groups  | 1      | 1.1              |
| INTERNATIONAL - European Independent couples 25-39                                | 14     | 15.2             |
| INTERNATIONAL - European empty nesters 40 – 65                                    | 13     | 14.1             |
| INTERNATIONAL - North American couples 45 – 64                                    | 4      | 4.3              |
| A combination of them all   | 18     | 19.6             |

### Closure of the SWCP

97 responses were received to the question 'How would the closure of the SWCP affect your annual bookings?'. 4 respondents chose not to enter an answer. The responses were:

| Response  | n         | Valid Percent |
|---|-----------|---------------|
| It would have no noticeable effect on our bookings                | 18        | 18.6          |
| It would have some limited effect on our bookings                 | 53        | 54.6          |
| Our business would suffer dramatically as a result of its closure | 16        | 16.5          |
| Don't know  | 10        | 10.3          |
| <b>Total</b>  | <b>97</b> | <b>100.0</b>  |
| No response   | 4         |               |

### **The SWCP and the Foot and Mouth (FMD) Outbreak in 2001.**

94 responses were received to the question 'How did Foot and Mouth disease in the South West (2001) affect your trade?'. Seven respondents chose not to enter an answer. The responses were:

| <u>Response</u>  | <u>n</u>  | <u>% of Respondents</u> |
|--|-----------|-------------------------|
| Bookings declined greatly during the foot and mouth outbreak | 35        | 37.2                    |
| Bookings declined a little during foot and mouth             | 29        | 30.9                    |
| Bookings stayed the same during foot and mouth               | 19        | 20.2                    |
| Bookings increased a little during foot and mouth            | 9         | 9.6                     |
| Don't know   | 2         | 2.1                     |
| <b>Total Responses</b>                                       | <b>94</b> | <b>100.0</b>            |
| Non Responses  | 7         |                         |

APPENDIX 4: QUESTIONNAIRE TO LOW-COST NON-SERVICED  
ACCOMMODATION PROVIDERS ALONG THE SWCP

## **South West Coast Path Silver Jubilee - 2003**

***Hello!***

2003 is the Silver Jubilee anniversary of the South West Coast Path, and to mark the occasion, a research project is being conducted to assess the current use and impact of the National Trail. This exercise will not only be a fitting way to mark the 25<sup>th</sup> anniversary, it will also provide key economic facts and figures for use during the year's PR and media campaign.

The research consists of four components ('snapshots'), and whilst this is not a formalised economic impact study, each 'snapshot' will provide specific information (useful in itself) that when taken together will paint a full picture of the impact of the Coast Path on existing tourism businesses (i.e. you) and the local community.

The University of Exeter and South West Tourism are undertaking this research on behalf of the South West Coast Path Team. The research is being funded by the Countryside Agency and the South West Regional Development Agency.

***So, what do we want you to do?***

Enclosed, you will find a short questionnaire, which is to be completed and sent back in the pre-paid envelope provided. The questionnaires are ***confidential*** – at no point will any of your details be used or passed on to other agencies. The results of this research really are going to be used in the future, and we can't assess the impact of the trail, unless we communicate with businesses such as yours. We are hoping for a ***100% response rate!***

Frank Velandar and Tony Griffiths from the YHA are fully supportive of the research and would like to encourage all hostel managers to respond.

Your views really do matter, so please take a couple of moments and send the completed questionnaire back to us before the ***28th January 2003***. If you find it easier to fax the questionnaire back to us, then please do so – the fax number is (01392) 263342.

Many thanks, and best wishes for a prosperous New Year!

*N.B. The South West Coast Path is referred to as 'SWCP' within the following questionnaire*

***Hello!***

2003 is the Silver Jubilee anniversary of the South West Coast Path, and to mark the occasion, a research project is being conducted to assess the current use and impact of the National Trail. This exercise will not only be a fitting way to mark the 25<sup>th</sup> anniversary, it will also provide key economic facts and figures for use during the year's PR and media campaign.

The research consists of four components ('snapshots'), and whilst this is not a formalised economic impact study, each 'snapshot' will provide specific information (useful in itself) that when taken together will paint a full picture of the impact of the Coast Path on existing tourism businesses (i.e. you) and the local community.

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Many thanks, and best wishes for a prosperous New Year!

*N.B. The South West Coast Path is referred to as 'SWCP' within the following questionnaire*

**South West Coast Path Silver Jubilee - 2003**

|  |  |  |
|--|--|--|
| <b>1. What main type of tourism business do you manage/run? (Please tick one box)</b>  |  |  |
| <input type="checkbox"/> Hostel  | <input type="checkbox"/> Self-catering flats/apartments etc. |  |
| <input type="checkbox"/> Guest House (no breakfast)  | <input type="checkbox"/> Hotel                               |  |
| <input type="checkbox"/> Bed and Breakfast   | <input type="checkbox"/> Holiday/caravan park                |  |
| <b>2. How many beds does your establishment have?</b>  |  |  |
| .....  |  |  |
| <b>3. How would you describe the location of your business? (Please tick one)</b>  |  |  |
| <input type="checkbox"/> Coastal   | <input type="checkbox"/> Rural                               |  |
| <input type="checkbox"/> Moor  | <input type="checkbox"/> Other (please specify)              |  |
| <input type="checkbox"/> Town  | .....  |  |
| <b>4. How do most of your guests find out about your establishment? (Tick all that apply)</b>  |  |  |
| <input type="checkbox"/> SWCP Guidebook  | <input type="checkbox"/> Word of mouth                       |  |
| <input type="checkbox"/> Advertisements in local press   | <input type="checkbox"/> Internet                            |  |
| <input type="checkbox"/> Advertisement in national press   | <input type="checkbox"/> Holiday brochure/guidebook          |  |
| <input type="checkbox"/> Hostel Guidebook  | <input type="checkbox"/> Other                               |  |
| <b>5. Which of the following activities do your customers take part in, whilst staying at your establishment? (Please enter the two most popular activities; '1' for most popular, '2' for second most popular).</b> |  |  |
| <input type="checkbox"/> Water and Beach activities  | <input type="checkbox"/> Visiting towns and villages         |  |
| <input type="checkbox"/> Walks anywhere (i.e. moors, countryside etc.)   | <input type="checkbox"/> Visiting local attractions          |  |
| <input type="checkbox"/> Walks along the SWCP  | <input type="checkbox"/> Other (please specify)              |  |
|  | .....  |  |
|  | .....  |  |
| <b>6. How important would you say the proximity of the South West Coast Path is, in attracting visitors to your establishment? (Please tick one box)</b>   |  |  |
| <input type="checkbox"/> "It seems to be a huge selling point for most of our visitors"  |  |  |
| <input type="checkbox"/> "It is of relative importance to many of our visitors"  |  |  |
| <input type="checkbox"/> "It is neither important or unimportant to the majority of our visitors"  |  |  |
| <input type="checkbox"/> "It is not very important to many of our visitors"  |  |  |
| <input type="checkbox"/> "Very few of our visitors know about it"  |  |  |
| <b>7. What percentage of your visitors stay at your establishment, purely because of its proximity to the South West Coast Path? (Please tick one box)</b>   |  |  |
| <input type="checkbox"/> Fewer than 25%  | <input type="checkbox"/> Between 50% and 75%                 |  |
| <input type="checkbox"/> Between 25% and 50%   | <input type="checkbox"/> Between 75% and 100%                |  |

|   |   |  |
|---|---|--|
| <b>8. In your opinion, why do you think visitors choose to visit the general location of your establishment? (Please tick all that apply)</b>   |   |  |
| <input type="checkbox"/> Proximity to the SWCP  | <input type="checkbox"/> Good walking in the area                                     |  |
| <input type="checkbox"/> Like the area  | <input type="checkbox"/> Good for other outdoor activities                            |  |
| <input type="checkbox"/> Plenty to do in the area   | <input type="checkbox"/> Other (please specify)                                       |  |
| <input type="checkbox"/> Reasonable Price   | .....   |  |
| <b>9. Approximately, what percentage of your income comes from people using your establishment purely because of its proximity to the South West Coast Path? (i.e. those who only stay there because of the coast path) (Please tick one box)</b> |   |  |
| <input type="checkbox"/> Less than 10%  | <input type="checkbox"/> Between 50% and 75%  |  |
| <input type="checkbox"/> Between 10% and 25%  | <input type="checkbox"/> Between 75% and 90%  |  |
| <input type="checkbox"/> Between 25% and 50%  | <input type="checkbox"/> Between 90% and 100%   |  |
| <b>10. What are your first and second most important market segments? (Please enter '1' for most important, and '2' for second most important)</b>  |   |  |
| <b>Domestic visitors</b>  | <b>International visitors</b>   |  |
| <input type="checkbox"/> Under 25s, no children   | <input type="checkbox"/> European Independent couples 25-39                           |  |
| <input type="checkbox"/> Family groups with young children  | <input type="checkbox"/> European empty nesters 40-65                                 |  |
| <input type="checkbox"/> Family groups with older children  | <input type="checkbox"/> North American couples 45-64                                 |  |
| <input type="checkbox"/> Under 40s, no children   | <input type="checkbox"/> A combination of all   |  |
| <input type="checkbox"/> Empty nesters (i.e. older couples 40-60) whose children have left home   | <input type="checkbox"/> A different international visitor type (Please specify)..... |  |
| <input type="checkbox"/> Retired people (60 +)  | <input type="checkbox"/> None of the above  |  |
| <input type="checkbox"/> Educational / school groups  |   |  |
| <b>11. On average, how long do those who go for walks along the South West Coast Path stay in your establishment, compared with those who don't?</b>  |   |  |
| SWCP walkers: ..... nights  | Non SWCP walkers: ..... nights  |  |
| <b>12. In general how long in advance do visitors book to stay in your establishment?</b>   |   |  |
| ..... months / weeks / days (Delete as appropriate)   |   |  |
| <b>13. Do those who specifically come to use the South West Coast Path tend to be:</b>  |   |  |
| <input type="checkbox"/> Repeat visitors  | <input type="checkbox"/> First time visitors  |  |
| <b>14. Is there anything that you would like to mention, specifically about the value of the South West Coast Path to your business?</b>  |   |  |
| .....   |   |  |
| .....   |   |  |
| .....   |   |  |
| .....   |   |  |

APPENDIX 5: ADDENDARY INFORMATION DERIVED FROM THE QUESTIONNAIRE TO LOW-COST NON-SERVICED ACCOMMODATION PROVIDERS ALONG THE SWCP NOT OTHERWISE CONTAINED WITHIN THE MAIN REPORT.

**Sources of information**

69 responses (average of 3.63 per respondent) were received to the question ‘How do most of your guests find out about your establishment?’. The responses were:

| <u>Source of information</u>     | <u>Number</u> | <u>% of Respondents</u> |
|----------------------------------|---------------|-------------------------|
| Hostel Guidebook                 | 18            | 94.7                    |
| Internet                         | 17            | 89.5                    |
| Word of mouth                    | 15            | 78.9                    |
| Holiday brochure/guidebook       | 8             | 42.1                    |
| SWCP Guidebook                   | 7             | 36.8                    |
| Other                            | 2             | 10.5                    |
| Advertisements in local press    | 1             | 5.3                     |
| Advertisements in national press | 1             | 5.3                     |

**Activities of Visitors to Low Cost, Non-serviced Accommodation**

37 responses (average of 1.95 per respondent) were received to the question ‘Which of the following activities do your customers take part in whilst staying at your establishment?’. The data were:

| <u>Activity</u>                          | <u>Number</u> | <u>% of Respondents</u> |
|--|---------------|-------------------------|
| Walks along the SWCP                     | 12            | 66.7                    |
| Visiting local attractions               | 12            | 66.7                    |
| Walks anywhere (i.e. moors, countryside) | 7             | 38.9                    |
| Visiting towns and villages              | 6             | 33.3                    |

**SWCP as a Trigger for Visitors**

80 responses were received (average of 4.2 per respondent) to the question ‘In your opinion, why do you think visitors chose to visit the general location of your establishment?’. The answers were:

| <u>Reason</u>                     | <u>Number of Responses</u> | <u>% of Respondents</u> |
|-----------------------------------|----------------------------|-------------------------|
| Like the area                     | 14                         | 73.7                    |
| Good for other outdoor activities | 14                         | 73.7                    |
| Good walking in the area          | 13                         | 68.4                    |
| Proximity to SWCP                 | 12                         | 63.2                    |
| Reasonable price                  | 12                         | 63.2                    |
| Plenty to do in the area          | 9                          | 47.4                    |
| beaches and surfing               | 5                          | 26.3                    |
| Eden project                      | 1                          | 5.3                     |

## Market Segments

33 responses were received from the question 'What are the first and second most important market segments?'. 2 respondents chose not to answer this question. The data were:

| Segment  | n | % of Respondents |
|--|---|------------------|
| DOMESTIC-Under 25s, no children  | 6 | 35.3             |
| DOMESTIC-Family groups with young children   | 7 | 41.2             |
| DOMESTIC-Family groups with older children   | 2 | 11.8             |
| DOMESTIC-Empty nesters (i.e. older couples 40-60)<br>whose children have left home | 1 | 5.9              |
| DOMESTIC-Retired people (60+)  | 1 | 5.9              |
| DOMESTIC-Educational / school groups   | 5 | 29.4             |
| INTERNATIONAL-European independent couples 25-39                                   | 5 | 29.4             |
| INTERNATIONAL-Combination of all   | 3 | 17.6             |
| INTERNATIONAL-a different International visitor types                              | 1 | 5.9              |
| Backpackers  | 2 | 11.8             |

APPENDIX 6: TELEPHONE QUESTIONNAIRE SCHEDULE TO RESIDENTS ON THEIR USAGE OF THE SWCP.

## South West Coast Path Silver Jubilee Research, 2003

The South West Coast Path National Trail is a 630-mile adventure around the coastline of the south west peninsula. From Minehead on the edge of the Exmoor National Park all the way to the shores of Poole Harbour, it is simply the best way to enjoy our wonderful coastline, its scenery, wildlife and history.

Millions of people - both local residents and visitors - enjoy the South West Coast Path every year; many of them go for a gentle stroll, a few tackle the epic end-to-end journey that takes them eight weeks to complete.

Developing this remarkable path took many years, and the last major piece of the jigsaw was put into place with the opening of the Somerset and North Devon section in 1978. 2003 therefore marks the 25<sup>th</sup> anniversary of the South West Coast Path and this celebratory year will be marked in many different ways.

One important element is some new research that South West Tourism is undertaking on behalf of the South West Coast Path Team and the Countryside Agency. The aim is to better understand residents' knowledge and usage of the path; whether or not they use it regularly, or indeed at all. I hope you will be happy to help us with our Silver Jubilee celebrations by being a part of our research.

One of our research team will contact you by telephone sometime during the last two weeks of January. If you agree, they will ask you some questions that will only take a few minutes of your time. We will be seeking your views and experiences of the South West Coast Path only.

If you would prefer not to be contacted, please do not hesitate to let us know by writing to the Research Manager, South West Tourism, Woodwater Park, Exeter, EX2 5WT (or email [phudson@swtourism.co.uk](mailto:phudson@swtourism.co.uk)), ensuring that your name and postal address are indicated.

Any information you give will be treated in the strictest confidence. This is a research exercise, and we are not trying to sell you anything! Thanking you in advance of your assistance with this project.

Yours faithfully,

**Paul Hudson**

A handwritten signature in black ink that reads "Paul Hudson". The signature is written in a cursive style with a long horizontal flourish underneath the name.

Research Manager,  
South West Tourism

# SOUTH WEST COAST PATH

## RESIDENT SURVEY 2003

Good evening, I am calling on behalf of South West Tourism. A couple of weeks ago we sent you a letter explaining about a research project we are undertaking on behalf of the South West Coast Path Team, the Countryside Agency and South West Regional Development Agency. Are you happy to take part in the survey?

**Q1 Do you ever go for a walk or stroll for leisure purposes? (By a walk or stroll for leisure purposes we mean a trip starting and ending from your home on the day of the trip, and can include a 2 or 3 mile hike or walking the dog, for example)**

- Yes .....  1  
No .....  2

**Q2 Where do you enjoy walking? (Tick all that apply)**

- Moorland .....  1  
The coast .....  2  
The countryside .....  3  
Woodland/nature trails .....  4  
Urban/historic walks .....  5  
Country Parks .....  6  
Locally (no specific walking theme) .....  7

**NOTE FOR INTERVIEWER - Remember that the South West Coast Path (the focus of this research) is a continuous stretch of footpath which runs along the coasts of Dorset, starting just outside of Poole, Devon, Cornwall and Somerset - finishing at Minehead. Ensure that the 'coast' walked is part of the SWCP.**

**Q3 What are your main reasons for NOT using the coast for walking? (TICK ALL THAT APPLY)**

- Prefer to go elsewhere .....   
Too close to home/familiar.....   
Not enough to see & do.....   
Too many tourists .....   
Bad access/roads/traffic problems .....   
Poor health/old age .....   
Weather/climate .....   
Other (please specify below) .....

NOTE FOR INTERVIEWER - Please complete the average number of walks taken for the appropriate time period for the next question. Enter '0' in those time periods that do not apply.

**Q4 On average, how many of your walks will include a visit to the coast....**

|                          |                      |
|--------------------------|----------------------|
| ..... IN A TYPICAL WEEK  | <input type="text"/> |
| ..... IN A TYPICAL MONTH | <input type="text"/> |
| ..... IN A TYPICAL YEAR  | <input type="text"/> |

**Q5 Does the number of walks, using the coast, change according to the time of year?**

Yes .....  1

No .....  2

**Q6 How many walks on average do YOU make using a coast path during the following months? (PLEASE PUT '0' IF NO TRIPS MADE BUT LEAVE BLANK IF 'DON'T KNOW'/CAN'T RECALL).**

|                           |                      |
|---------------------------|----------------------|
| January to March .....    | <input type="text"/> |
| April to June .....       | <input type="text"/> |
| July to September .....   | <input type="text"/> |
| October to December ..... | <input type="text"/> |

**Q7 How many members of your household, excluding yourself, go for a walk along the coast?**

**Q8 What are your main reasons for choosing to use a coast path? (TICK ALL THAT APPLY)**

Close to home/easy to get to .....  1

Landscape/scenery .....  2

Exercise and health .....  3

Relaxation/peace and quiet .....  4

Good place for children .....  5

Favourite place.....  6

Easy to use/well marked route .....  7

Other (please specify below).....  8

**Q9** Of the total number of your walks on the coast that you told me of earlier, approximately what proportion/percentage of those walks are due to the fact that you are entertaining friends or relatives who are visiting the area? ( ENTER A PERCENTAGE)

**Q10** On average, how many people (excluding yourself and/or members of your household) would be in a group of friends and relatives that go for a walk using a coast path?

..... Average number in group

**Q11** What would be the typical duration of a walk on the coast?

- Less than 1/2 hour .....  1
- 1/2 hour - 1 hour .....  2
- 1-2 hours .....  3
- 2-3 hours .....  4
- 3-4hours.....  5
- 4+ hours .....  6

**Q12** What is the MAIN mode of transport you typically use to reach the coast for a walk?

- Walk from home .....  1
- Car/van/motorcycle .....  2
- Bus/coach .....  3
- Bicycle .....  4
- Train .....  5
- Other (please specify below) .....  6

**Q13** How far do you usually travel to reach the coast for a walk?

..... Average distance (to the nearest mile)

**Q14** When you stroll or walk along the coast in the South West, what is the name of the path/route you tend to use? (Press for one answer only)

- South West Coast Path .....
- The Coast Path .....
- South West Way .....
- South West Peninsula Path .....
- Don't know/unsure/unaware of name .....
- Other (specify below) .....

**NOTE FOR INTERVIEWER:** When asking the following question we are looking for an average of all expenditure at a destination/destinations, for a visit motivated by the SWCP.

**Q15** Thinking about a walk that YOU might make using a coast path, how much would you expect to spend on average in total? (PLEASE PUT '0' IF SPEND NOTHING AND LEAVE BLANK IF DON'T KNOW/CAN'T RECALL/REFUSE TO ANSWER)

Average spend.....

**Q16** What types of items might you spend money on during a walk that includes the coastline? (TICK ALL THAT APPLY)

- Food & drink.....
- Shopping .....
- Entertainment/Attractions.....
- Travel & transport.....
- Other (please specify below) .....

**Q17** During a typical year do you spend anything on equipment specifically for walking (this can include boots, warm weather clothing, maps and guide books, etc.)?

- Yes .....
- No .....

**Q18** How much do you spend on equipment specifically for walking in a year?

Clothes and Boots .....

Maps and guides .....

Other (SPECIFICALLY EQUIPMENT SPEND) .....

**Q19** Do you ever spend a night away from home on a holiday or break in the South West and walk or stroll on the coast?

- Yes .....
- No .....

**Q20** Finally, may I ask some quick questions about you and your household. First, which of the following age categories do you fall into?

- 16-19 Yrs .....
- 20-34 Yrs .....
- 35-44 Yrs.....
- 45-55 Yrs .....

56+ Yrs .....

**Q21 How many adults in the following age categories live in your household?**  
**16-24 years**

**45-54 years**

**25-34 years**

**55-64 years**

**35-44 years**

**65+ years**

**Q22 And how many children aged 15 or under live in your household?**

**Q23 What is (or was if retired) the full job title of the main wage earner in your household?**

**Q24 Prompt for working status?**

Working full-time .....

Working part-time .....

Retired .....

In full-time education .....

Unemployed .....

Housewife/house husband .....

**Thank you very much for your time**

**FILL IN ON COMPLETION OF INTERVIEW**

**Q25 Note but don't ask, gender of respondent?**

Male .....

Female .....

**Q26 County of residence?**

Dorset .....  1

Devon .....  2

Cornwall .....  3

Somerset .....  4

**Q27 Postcode?**

APPENDIX 7: ADDENDARY INFORMATION DERIVED FROM THE QUESTIONNAIRE OF RESIDENTS NOT OTHERWISE CONTAINED WITHIN THE MAIN REPORT.

**Push Factors against the SWCP as a Destination**

'Lack of time' was the main reason for not choosing the coast for approximately 50% of those stating 'other' reasons.

*Table: Reasons for not choosing the coast to walk*

| Reason for not choosing to walk the coast | % of Respondents |
|---|------------------|
| Poor health/old age                       | 49               |
| Other                                     | 34               |
| Prefer elsewhere                          | 21               |
| Bad Accessibility                         | 3                |
| Weather/climate                           | 3                |
| Too many tourists                         | 2                |

**Pull Factors for the SWCP as a Destination**

'Exercising the dog' was the reason given by a third of those who gave 'other' reasons for choosing the SWCP.

*Table: Reasons for choosing the SWCP*

| Reason            | Percent Responses |
|-------------------|-------------------|
| Landscape/scenery | 87                |
| Relaxation        | 68                |
| Health-related    | 68                |
| Close to home     | 53                |
| Easy to use       | 47                |
| Favourite place   | 38                |
| Good for Children | 19                |
| Other             | 12                |

**Typical Duration of a Walk on the Coast**

*Table: Time Distribution of Coastal walks*

| Time             | % of Respondents |
|------------------|------------------|
| < 30 mins        | 1                |
| 30 mins – 1 hour | 19               |
| 1 – 2 hours      | 45               |
| 2 – 3 hours      | 19               |
| 3 – 4 hours      | 8                |
| 4 + hours        | 8                |

## Spend on Walking Equipment

30% of respondents stated that they spent money specifically on walking equipment.

Table: Spend on walking equipment: particular items

| Item              | Spend (£ per annum) |
|-------------------|---------------------|
| Other             | 1.25                |
| Maps and guides   | 4.78                |
| Clothes and Boots | 48.06               |

## Transportation and Travelling Distance

39% of respondents had spent a night away and walked on the SWCP

- The main mode of transport used to reach the coast is either a car, van or motorcycle as stated by 90% of respondents.
- 9% walked from home.
- 1% uses a bus or coach.

## Distance Travelled to the Path

Table: Average distance travelled to the coast.

| Location              | Average Distance travelled (miles) |
|-----------------------|------------------------------------|
| Dorset                | 11.47                              |
| Devon                 | 19.41                              |
| Cornwall              | 9.00                               |
| Somerset              | 24.64                              |
| All counties combined | 15.79                              |

## Residents' Knowledge of the SWCP

When asked to name the coastal path used for walking 25% stated the name was *The South West Coast Path*

Table: The name of the path

| Name Variant          | Percent Responses |
|-----------------------|-------------------|
| Don't know            | 35                |
| South West Coast Path | 25                |
| The Coast Path        | 23                |
| Other                 | 15                |
| SW Way                | 1                 |
| SW Peninsula Path     | 0                 |

Some 'Other' names given were 'Coastal Path', 'Coastal Footpath', 'The Coast' and references to the specific area being used.