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Llwybr Arfordir Cymru
Wales Coast Path

The Wales Coast Path Visitor Survey 2015

The Economic Impact of Coastal Walking in Wales 2014

Sarah McDonough, Beaufort Research Ltd and
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NRW Evidence Report No 171

About Natural Resources Wales

Natural Resources Wales is the organisation responsible for the work carried out by the three former organisations, the Countryside Council for Wales, Environment Agency Wales and Forestry Commission Wales. It is also responsible for some functions previously undertaken by Welsh Government.

Our purpose is to ensure that the natural resources of Wales are sustainably maintained, used and enhanced, now and in the future.

We work for the communities of Wales to protect people and their homes as much as possible from environmental incidents like flooding and pollution. We provide opportunities for people to learn, use and benefit from Wales' natural resources.

We work to support Wales' economy by enabling the sustainable use of natural resources to support jobs and enterprise. We help businesses and developers to understand and consider environmental limits when they make important decisions.

We work to maintain and improve the quality of the environment for everyone and we work towards making the environment and our natural resources more resilient to climate change and other pressures.

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- Securing our data and information;
- Having a well resourced proactive programme of evidence work;
- Continuing to review and add to our evidence to ensure it is fit for the challenges facing us; and
- Communicating our evidence in an open and transparent way.

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The Wales Coast Path Visitor Survey 2015

The Economic Impact of Coastal Walking in Wales 2014

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Executive summary

This report, which is split into two sections, highlights the analysis of the Wales Coast Path Visitor Survey 2015 and Economic Impact of Coastal Walking in Wales 2014.

The first section, which was written by Beaufort Research, summarises the findings of the visitor survey (pages 10 to 43). Here the visitor profile is examined, awareness levels of the Wales Coast Path are assessed, and the usage is explored. The majority of interviews were conducted between January and December 2015 (96%), with a small proportion conducted in December 2014 (3%) and January 2016 (1%).

The second section describes work undertaken by the Welsh Economy Research Unit, Cardiff Business School, which estimates the economic impact of Wales Coast Path visitor spending in 2014 on the Welsh economy (pages 44 to 52).

Visitor Survey Analysis 2015

- Overall, the gender distribution of respondents was more even in the most recent wave of the research (51% male cf. 49% female), compared to the previous wave, where there was a slight skew towards male respondents (56% cf. 44% female). This brought the gender distribution of respondents more in-line with the adult population of the UK (49% male cf. 51% female¹: Source 2011 Census), and represents a statistically significant difference in the gender profile of respondents in 2015 compared to 2011-2013.
- The mean average age of respondents using the Wales Coast Path was 53 years; this remains unchanged from the 2011-2013 research, and is older than the UK mean age of 47 years² (source: Census 2011). Moreover, the distribution of respondents by age categories varies somewhat from the UK profile. While 31% of the UK population are aged 16–34 years of age, only 12% of respondents fell into this age group. And at the other end of the age scale, around a third of the UK population are aged over 55 years (34%), while over half of respondents fell into this age group (52%).
- In 2015, there was a fairly pronounced skew towards an ABC1 demographic amongst respondents, with a higher representation of people from both the AB categories (33%) and C1 category (36%) compared to the UK profile³ (22% AB; 31% C1). This was also the case in 2011-2013; although the skew was slightly more pronounced in the previous wave of the research (72% ABC1⁴ cf. 69% in 2015), with differences in the profile between the two surveys being statistically significant.

¹ Source: UK Census data Table QS104UK

² Source: Census 2011 data tables DC4447EW (England and Wales); QS103SC (Scotland); QS103NI (Northern Ireland).

³ Source: Census 2011 data table QS611UK

⁴ ABC1: professional, managers and non-manual positions

- Within the 1,483 user groups included in the 2015 research, there were 3,260 Wales Coast Path visitors; 2,843 adults and 417 children. Each group contained a mean of 1.9 adults, and amongst those groups with children (250), there was a mean of 1.7 children per group. The mean number of visitors per group remains fairly consistent with the 2011-2013 survey data. On the whole, around one in six user groups included children in 2015 (17%), down slightly on the 2011-2013 figure of 19%.
- Overall, a slight majority of visitors of the Wales Coast Path resided in Wales (59%), although this proportion varied according to the section of the Path used. Moreover, Wales residents tended to live fairly close-by to the section of the Path they were visiting.
- Only around one in ten respondents, in both waves of the research, described themselves or someone in their immediate party as having a limiting illness (12% for both surveys). The vast majority (88%) had no mobility issues.
- Awareness levels of the Path being joined into one have significantly increased by 8% since 2011-2013 (38% to 46% in 2015). However, the slight majority of respondents are still unaware of the unification of the Path (54%). A quarter of respondents thought that the Wales Coast Path was not currently joined but would be in future (25%), while around one in ten did not think that the Path would ever be joined (9%). Another fifth simply did not know about the status of the Path in terms of its unification (20%).
- The vast majority of respondents were walking along the Wales Coast Path when interviewed in 2015 (93%); this is relatively unchanged from 2011-2013 (94%). Less than one in ten cycled (6%), although this has significantly increased since 2011-2013 (4%). A very small minority of 2% used other forms of transport (e.g. horse-riding, motorised vehicle, assisted / disability vehicle).
- The overall proportion of respondents who were day-trip visitors or staying visitors (those staying overnight or as part of a longer holiday) remained unchanged between 2011-13 and 2015; most respondents were day-trip visitors (61%), while around four in ten were staying visitors (39%); staying visitors were most likely to be spending their trip staying at a campsite / caravan site, or in self-catering accommodation (25% for each).
- The vast majority of respondents in 2015 were repeat visitors of the Wales Coast Path (93% cf. 91% in 2011-2013); first-time visitors accounted for just 7% of respondents in 2015. Although the figures are fairly consistent with the 2011-2013 findings, the distribution of scores is significantly different in the 2015 wave compared to the previous survey.
- On the whole, respondents tended to be fairly regular visitors to the Wales Coast Path, with nearly two thirds using the Path once a month or more often (64% in 2015 cf. 66% in 2011-2013).

- Reflecting previous findings, most of the respondents interviewed in 2015 were using the Path as part of a leisure trip from home (60% cf. 58% in 2011-2013). A further 38% were using the Path as a leisure trip as part of a longer break or holiday in Wales; this proportion is unchanged from the 2011-2013 figure. Using the Path to or from their usual place of work, or for non-routine work trip purposes was mentioned by only a very small proportion of respondents (2% and 1% respectively). The distribution of scores in 2015 is significantly different to 2011-2013.
- When asked what they would have done if they had not been able to access that particular stretch of the Wales Coast Path, most reported that they would have sought an alternative route for walking, cycling or horse-riding (77%, significantly higher than 73% in 2011-2013). Just under one in twenty (4%) would have undertaken the journey using motorised transport, while a slightly higher proportion said they would not have made the journey at all (7%).
- The mean stretch of the Path covered by respondents in 2015 was 2.9 miles; this is significantly higher than the 2011-2013 distance of 1.8 miles, although it must be noted that in the previous research, return trips were not included in the calculations (as this data was not captured). Highest mileage covered was recorded amongst respondents using the Path along the North Coast (mean 4.3 miles), while the lowest mileage covered was recorded amongst respondents using the on Path Anglesey (mean 1.9 miles).
- In the most recent survey, respondents and their immediate party intended to spend a mean of £4.63 along that section of the Path (significantly up from £3.52 in 2011-2013). Mean spend was highest along sections of the Path in Carmarthen Bay & Gower (£6.90) and lowest along sections of the North Coast Path (£2.19). In terms of spend on the entire trip (excluding accommodation); respondents and their immediate party intended to spend a mean of £15.18, down slightly from the 2011-2013 figure of £15.62. Mean trip-spend was highest in Pembrokeshire (£27.34) and lowest along the North Coast (£6.99). The mean spend, per night, on paid accommodation was £74.11 (down from £76.42 in 2011-13); this rose to £85.37 in Anglesey and fell to £52.63 along the North Coast.
- Most respondents reported that they took precautions while using the Wales Coast Path (65%); around a quarter took some precautions and were happy to live with a small amount of risk (27%), but a higher proportion of 38% took all necessary precautions to feel safe while walking. A third of respondents did not take any precautions whilst using the Wales Coast Path (35%); most of these did not feel that using the Path posed any risk (26%), although 9% reported they were happy to live with some risk without taking precautions (9%).

The Economic Impact of Coastal Walking in Wales 2014

- The economic impacts that are attributable to coastal walking in Wales take place largely away from the coast itself (e.g. spending occurs in shops and on accommodation etc. in local towns). The analysis therefore looked at all trip related spending whether on, or away, from the coast.
- A large proportion of Welsh coastal walks involve walking on the Wales Coast Path itself.
- There were an estimated 43.447 million visits to the Welsh coast for walking in 2014; 37.877 million of these were by adults (defined as those aged 16 years or over).
- Direct expenditure by adult visitors on these trips was estimated at £547m.
- Net expenditure (allowing for leakages such as imports and taxes from gross expenditure) by adult visitors on these trips was £401m.
- The indirect impacts of net expenditure were assessed using Input Output modelling; the overall economic impacts of visitor spending attributable to walking at the Welsh coast in 2014 were then estimated as:
 - £540.9m of additional output in the Welsh economy
 - £271.4m of gross value added, and
 - Around 12,320 person-years of employment.
- In the EU Funded area section of the Welsh coast the overall impacts were estimated as:
 - £493.2m of additional output in the Welsh economy
 - £247.8m of gross value added, and
 - 11,270 person-years of employment.
- The overall Non-EU Funded area visitor spending impacts were estimated as:
 - £47.7m of additional output in the Welsh economy;
 - £23.6m of gross value added, and
 - 1,050 person-years of employment.
- Visitor spending attributable to walking at the Welsh coast creates economic impacts throughout different sectors of the Welsh economy, not just in traditional 'tourism-facing' sectors such as accommodation. In 2014, an estimated £31m of gross value added was supported in the transport and communications sector, with a similar amount added in the financial services sector in the Welsh economy.

SECTION A: VISITOR SURVEY ANALYSIS

1. Introduction and Objectives

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

A Monitoring and Evaluation of the Wales Coast Path was previously conducted in 2011 to 2013. The following report outlines the main findings of the most recent wave of the survey (referred to as 2015) conducted between December 2014 and January 2016, and makes comparisons between the findings of the two waves of research.

Specific objectives of the monitoring and evaluation programme were:

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

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

2. Methodology

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

A total of 1,483 interviews were completed during the fieldwork period December 2014 to January 2016. The majority of interviews were conducted between January and December 2015 (96%), with a small proportion conducted in December 2014 (3%) and January 2016 (1%).

A disproportionate sampling approach was adopted for the survey; 87% of the Path falls into EU Funded areas and 13% falls into Non-EU Funded areas. The table below illustrates how the statistical reliability of the data for Non-EU Funded areas was increased by adopting a disproportionate approach, conducting 20% of interviews in Non-EU Funded areas, rather than just 13%:

Area	% of path	No. of interviews if proportionate	Statistical confidence level ⁵ on data collected (if proportionate)	Actual number of interviews conducted	Statistical confidence level on actual data collected
EU Funded	87	1,290	+/- 2.7%	1,191	+/- 2.8%
Non-EU Funded	13	193	+/- 7.1%	292	+/- 5.7%

At analysis stage, to prevent the over-representation of views from visitors to the Path in Non-EU Funded areas, the data was weighted to bring the overall proportion of interviews conducted in Non-EU Funded areas back in line with the actual proportion of the Path falling into these areas (i.e. from 20% of the sample to 13% of the sample).

⁵ Confidence level: the proportion by which figures can vary from those reported when applied to ALL Path visitors (i.e. the total population of visitors) and not just the sample interviewed. Confidence level is determined by the total number of interviews conducted. Figures above relate to the variance at 50% response. For example, if 50% of a **sample of 1,290** answers "Yes" to a question, we can be 95% sure that between 47.3% and 52.7% of the total population holds the same opinion (i.e. +/-2.7%). However, if 50% of a **sample of 193** answers "Yes" to a question, we can be 95% sure that between 42.9% and 57.1% of the population holds this opinion (i.e. +/-7.1%).

In addition to the EU Funded / Non-EU Funded profile, the sample was also designed to mirror the diversity of the Path in terms of:

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

A total of 56 interview sites across the Coast Path were used for the research and these were chosen as a result of recommendations from NRW, by the individual local authorities and by Beaufort Research.

To ensure a truly representative sample of coast path visitors was interviewed, and avoid any bias, the following steps were taken:

- Criteria for eligibility for interview were imposed, as follows:
 - respondents **must have been** adults, aged 16 years or over;
 - they **must have been** using the Wales Coast Path at the time of interview;
 - they **must not have been** employed by any organisations associated with the Wales Coast Path;
- The 'next person' rule was employed, that is the interviewer selected respondents on the basis of the next person to pass on completion of the previous interview;
- Also, no more than one person per group was interviewed and – in the event of large groups – the 'next birthday' rule applied: that is the person with the next birthday to come in the group was interviewed. This overcame any potential bias in the sample and helped ensure it was as representative as possible;
- No quotas were imposed, to allow the profile of Coast Path visitors to fall out naturally.

Interviewers assigned to the project were chosen for their ability to reach the sites (some are remote) and their capacity to read maps (an essential part of the survey, as marking the Coast Path visitors' journey is of key importance). Interviewers were given a comprehensive briefing on the Coast Path and a detailed map to reach their exact point of interview on the Path itself. A risk analysis had been conducted at every site in 2011-2013, in order to ensure the safety and security of the interviewer/s at all times.

The sites used in the research were as follows:

<p>FLINTSHIRE Talacre Beach Greenfield Dock Flint Foreshore</p> <p>DENBIGHSHIRE Rhyl (nr TIC) Prestatyn (nr Nova Centre)</p> <p>CONWY Kinmel Bay Little Orme West Shore Llandudno Penmaenmawr Jubilee Path, Penmaenmawr Morfa Madryn</p> <p>ANGLESEY South Stack Moelfre Beaumaris</p> <p>GWYNEDD Plas Glyn y Weddw Porth Oer Tal y Bont Pont Coronation Treborth Botanical Gardens</p>	<p>CEREDIGION Aberporth Constitution Hill Penbryn Bird Rock nr New Quay Llanon Cardigan Cwmtedu</p> <p>PEMBROKESHIRE Manorbier Solva Wiseman's Bridge⁶ Dinas Newgale</p> <p>CARMARTHENSHIRE Pendine Village Laugharne Town Kidwelly Pembrey Mill Path</p> <p>SWANSEA Langland Bay Caswell Bay Rhossili Hills Burrows Southgate</p>	<p>NEATH PORT TALBOT Aberavon sea front The Quays, Baglan</p> <p>BRIDGEND Locks Common, Porthcawl Trecco Bay</p> <p>VALE OF GLAMORGAN Lavernock Point Porthkerry Country Park Cwm Colhugh, Llantwit Major Dunraven, Southerndown Ogmore</p> <p>CARDIFF Cardiff Bay Norweigan Church Parc Tredelerch</p> <p>NEWPORT Goldcliffe Point St Brides lighthouse Newport Wetlands</p> <p>MONMOUTH Black Rock Chepstow</p>
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A short questionnaire was administered in either English or Welsh (which was the choice of the respondent); while 14% of the survey sample spoke Welsh, just 2% chose to take part in a Welsh language interview. The questionnaire was designed to collect profiling information on Coast Path visitors as well as information about the length of the trip along the Path and spend on the day. Completed questionnaires were returned to Beaufort for quality checking and data entry.

The fieldwork for the visitor survey ran from December 2014 to January 2016.

⁶ Previously itemised as Dram

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

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

The data has also been analysed regionally; please note that the regional classifications for sections of the Wales Coast Path has been changed in the 2015 wave of the survey, to be more cohesive in terms of Path characteristics, rather than solely based on geographic location.

- North Coast: *Flintshire, Denbighshire, Conwy;*
- Anglesey;
- Gwynedd;
- Ceredigion;
- Pembrokeshire;
- Carmarthen Bay & Gower: *Carmarthenshire and Swansea;*
- South Coast: *Neath Port Talbot, Vale of Glamorgan, Cardiff, Newport and Monmouthshire.*

Throughout the body of the report statistically significant differences have been highlighted in the charts. This indicates where differences are due to actual change, as measured by statistical tests, and not due to random chance. The highlighted figures in the charts will show where the data is significantly different based on a comparison of the following results:

- Differences between the 2011-2013 survey and the 2015 survey;
- Differences within the 2015 results, based on comparison of sub-group data.

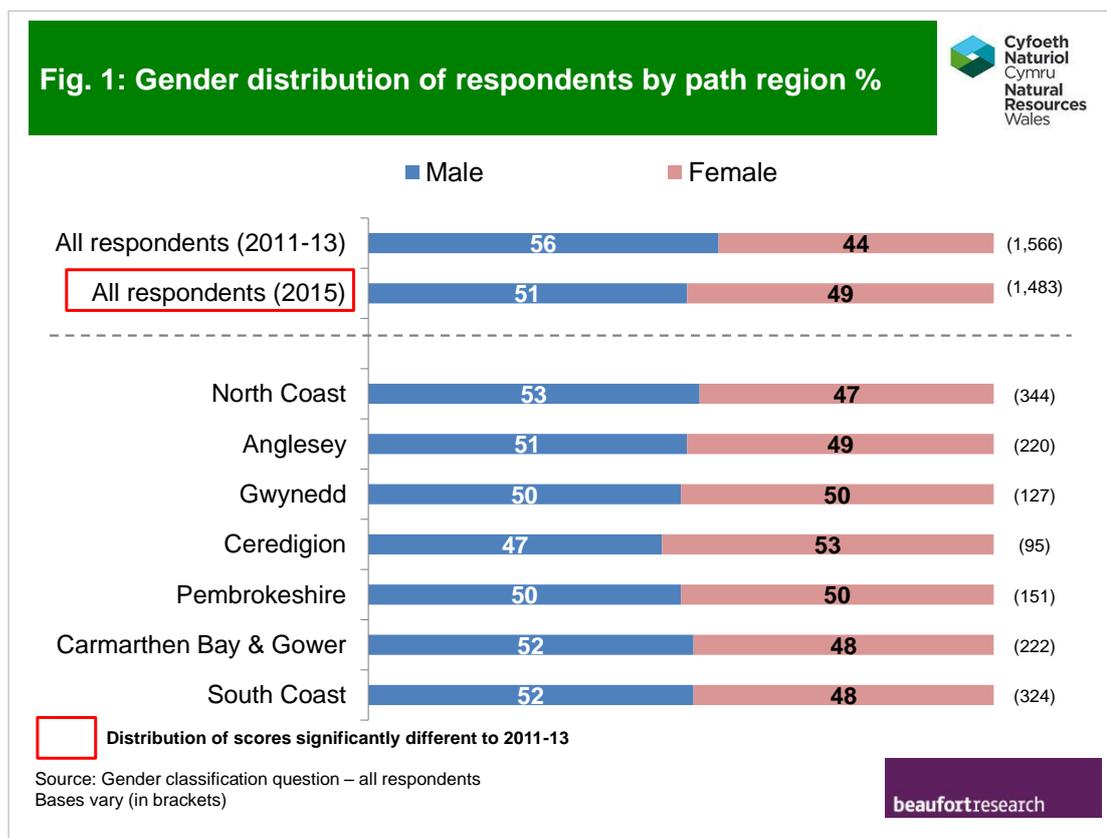
3. Main Findings from the Visitor Survey

3.1 Profiling Wales Coast Path Visitors

3.1.1 Gender profile

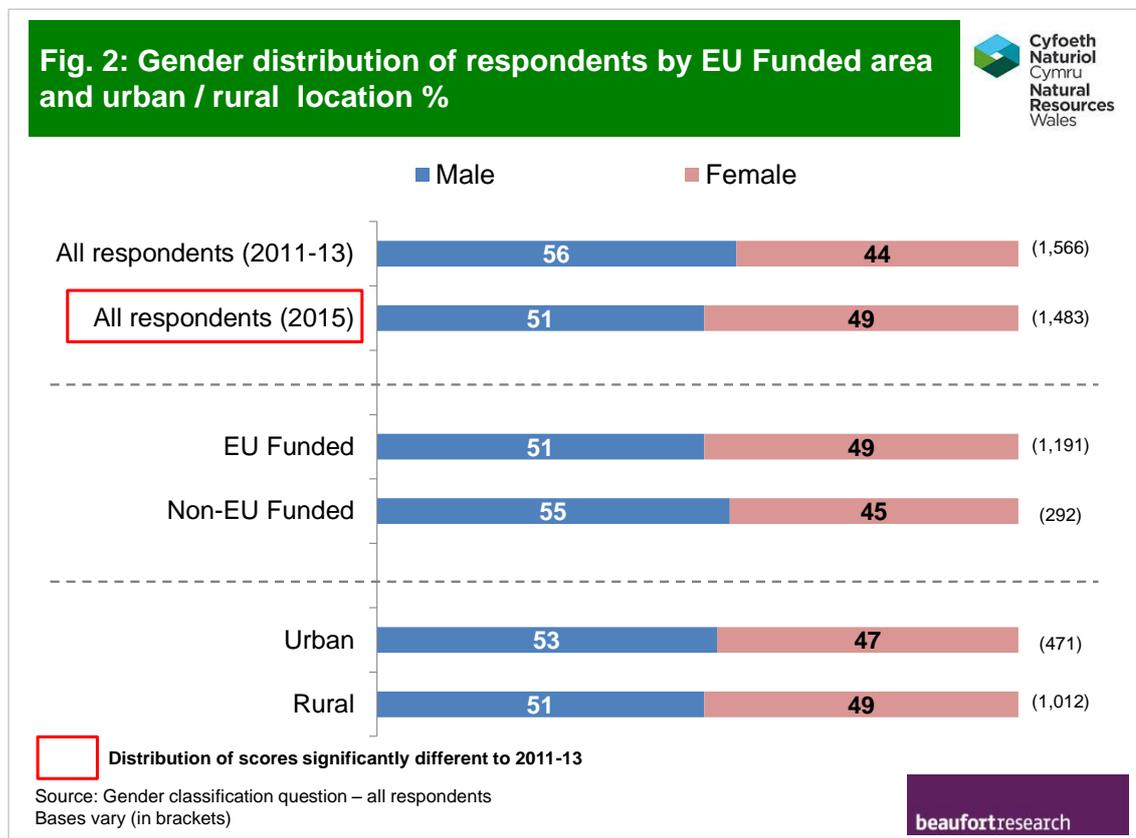
Overall, the gender distribution of respondents was more even in the most recent wave of the research (51% male cf. 49% female), compared to the previous wave, where there was a slight skew towards male respondents (56% cf. 44% female). This brought the gender distribution of respondents more in-line with the adult population of the UK (49% male cf. 51% female⁷: Source 2011 Census), and represents a statistically significant difference in the gender profile of respondents in 2015 compared to 2011-2013.

There was, however, a general propensity for a slightly higher proportion of male respondents compared to female across the different geographic areas of the Path; this was most evident along the North Coast (53% male cf. 47% female). The only area of the Path where the gender skew moved towards more females than males was in Ceredigion (47% male cf. 53% female) – see Figure 1 below.



⁷ UK Census data Table QS104UK

There was a slight skew toward more males than females in urban areas of the Path (53% male cf. 47% female). Moreover, there were a higher proportion of male respondents in Non-EU Funded areas of the Wales Coast Path (55% male cf. 45% female). In EU Funded and rural areas, the gender distribution of respondents equalled the overall profile – see Figure 2 below.



Further analysis of the data by gender reveals that cyclists along the Path were much more likely to be male (70%) compared to female (30%), whereas the profile of walkers is an even 50/50 split. Moreover, those respondents aged 65+ years were predominantly male (62%); respondents aged younger than this showed a more even gender distribution.

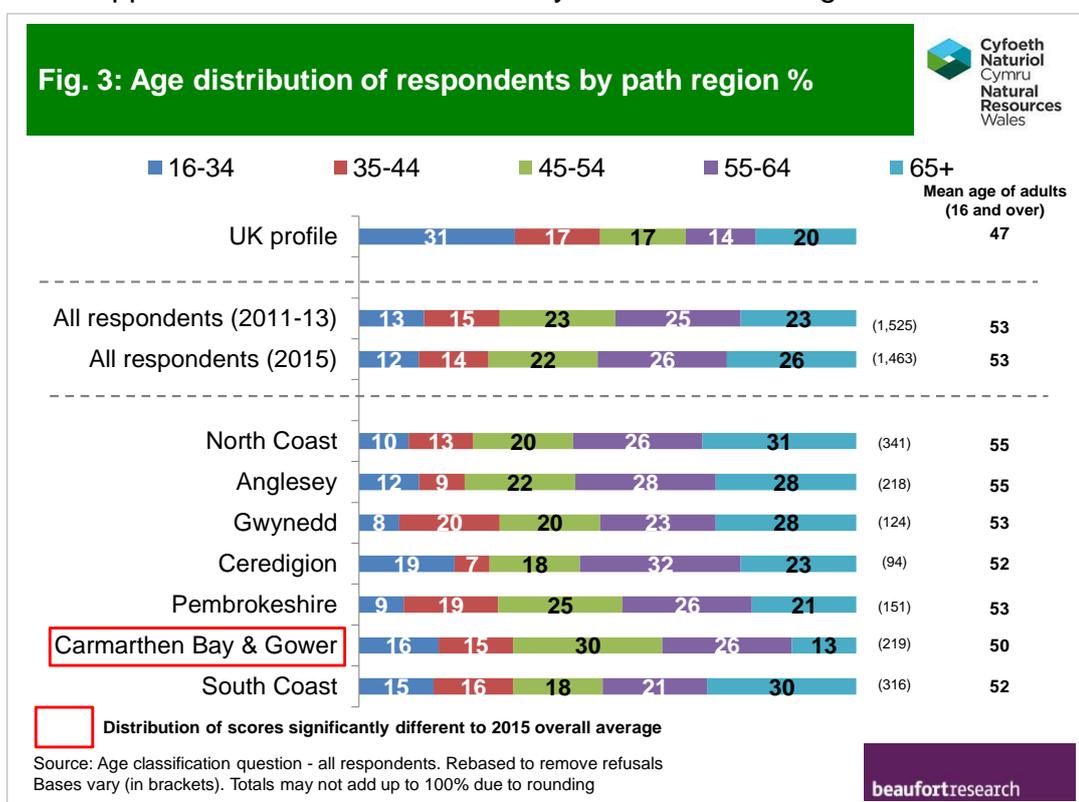
In terms of group composition; amongst those user groups containing children, respondents were more likely to be female (59%) rather than male (41%).

3.1.2 Age profile

In the most recent wave of the research, the mean average age of respondents using the Wales Coast Path was 53 years; this remains unchanged from the 2011-2013 research, but is older than the UK mean age of 47 years⁸. Moreover, the distribution of respondents by age categories varies somewhat from the UK profile.

While 31% of the UK population are aged 16–34 years of age, in 2015, only 12% of respondents fell into this age group (13% in 2011-2013). And at the other end of the age scale, around a third of the UK population are aged over 55 years (34%), while over half of respondents fell into this age group (52% 2015; 48% 2011-2013).

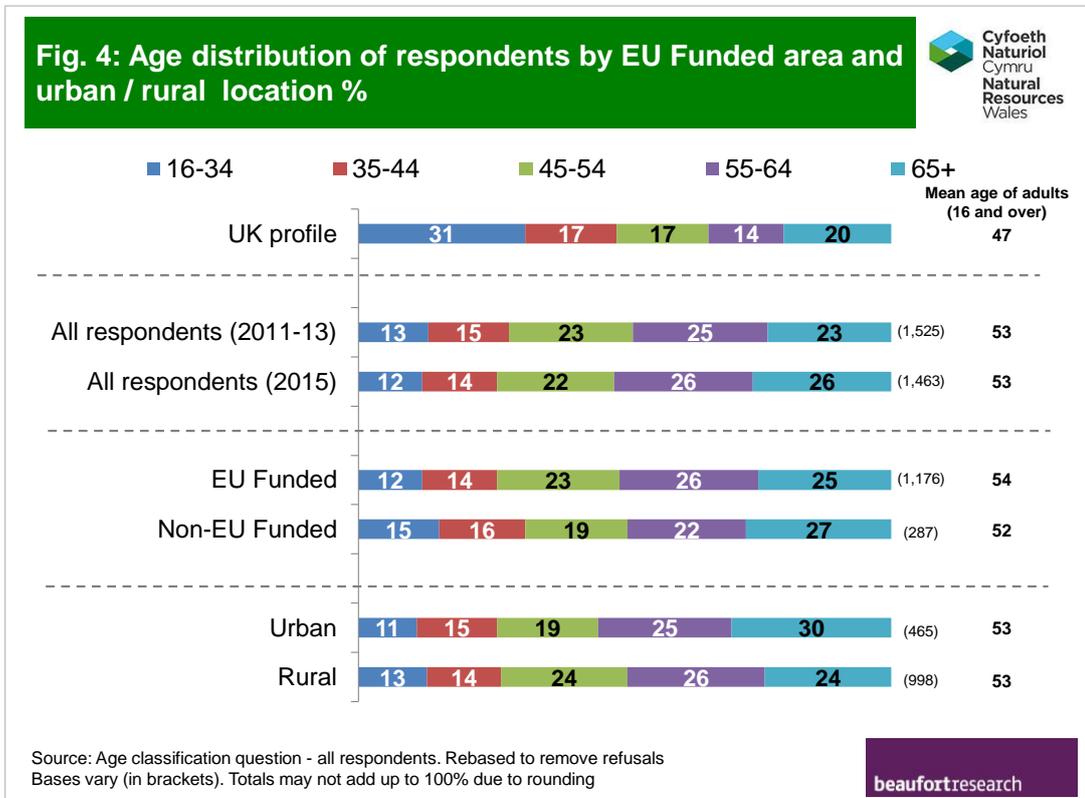
There were variations in the age of respondents according to the geographic location of the Path. For example, in Ceredigion, a higher proportion of respondents were aged 16–34 years (19%), while in Gwynedd it dropped to just 8%. Moreover, while over 55's accounted for 55% of respondents in Ceredigion, this dropped to 39% in Carmarthen Bay & Gower - see Figure 3 below.



⁸ Source: Census 2011 data tables DC4447EW (England and Wales); QS103SC (Scotland); QS103NI (Northern Ireland).

There was little variation in the age profile of respondents by EU Funded / Non-EU Funded area, although there were slightly more younger respondents aged 16-34 in Non-EU Funded areas (15%) compared to EU Funded areas (12%).

In urban areas of the Wales Coast Path, respondents tended to be slightly older compared to rural areas. For example, there were more respondents aged 55+ in urban areas of the Path (55% cf. 50% rural); conversely, there were slightly fewer respondents aged 16-34 years in urban areas of the Path (11%) than in rural (13%) – see Figure 4 below.



As might be expected, older respondents aged 55+ were more likely to be in adult-only visitor groups (58%) than groups containing children (20%); the respondents amongst mixed adult / children groups were most likely to be aged 35–44 years (39%).

Day-trip visitors were also more likely to be aged 55+ (54%) than staying visitors (48%).

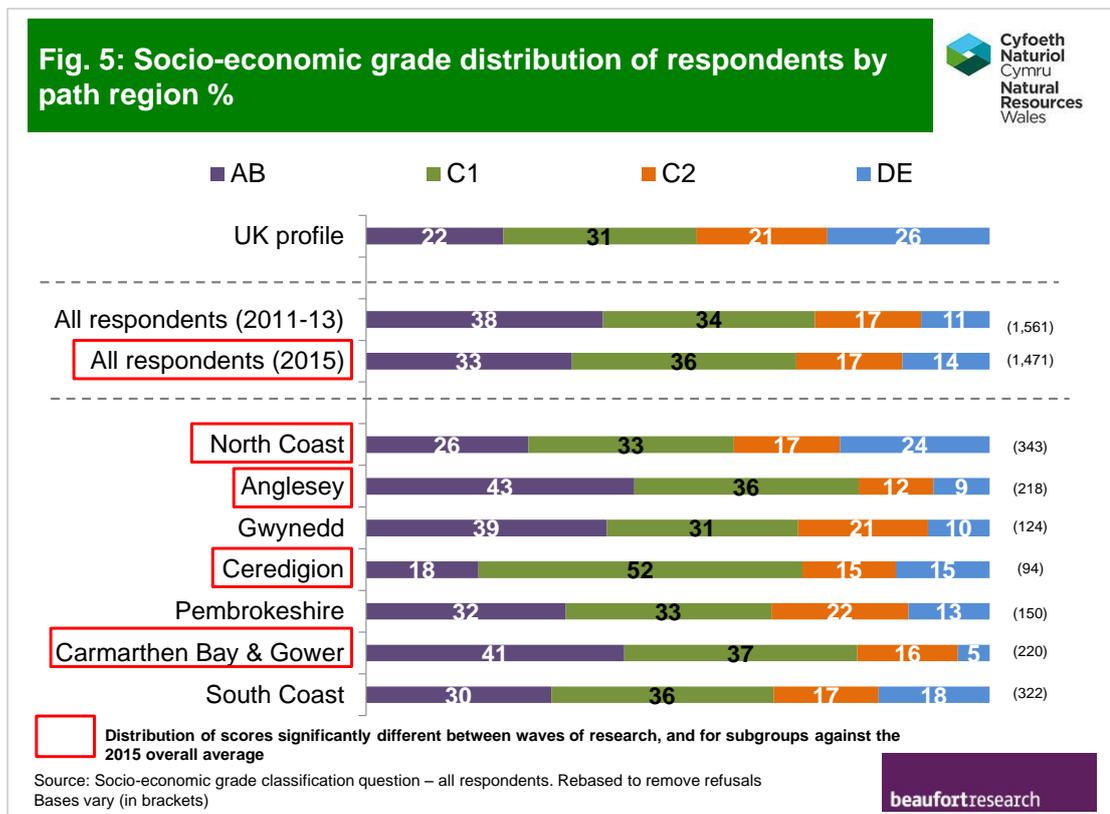
3.1.3 Socio-economic profile

In 2015, there was a fairly pronounced skew towards an ABC1 demographic amongst respondents, with a higher representation of people from both the AB categories (33%) and C1 category (36%) compared to the UK profile⁹ (22% AB; 31% C1). This was also the case in 2011-2013; although the skew was slightly more pronounced in the previous wave of the research (72% ABC1¹⁰ cf. 69% in 2015), with differences in the profile between the two surveys being statistically significant.

The socio-economic profile of respondents varied considerably according to Path location, although in all locations there was a predominance of ABC1 respondents; areas where the socio-economic profile varies significantly from the overall profile have been highlighted in red in Figure 5 below.

In Anglesey and Carmarthen Bay & Gower, two in five respondents were AB (43% and 41% respectively), while in Ceredigion this proportion decreased to just one in five (18%).

Representation of the C2DE¹¹ socio-economic groups was highest along sections of the Path located along the North Coast (41%) and Pembrokeshire (35%).

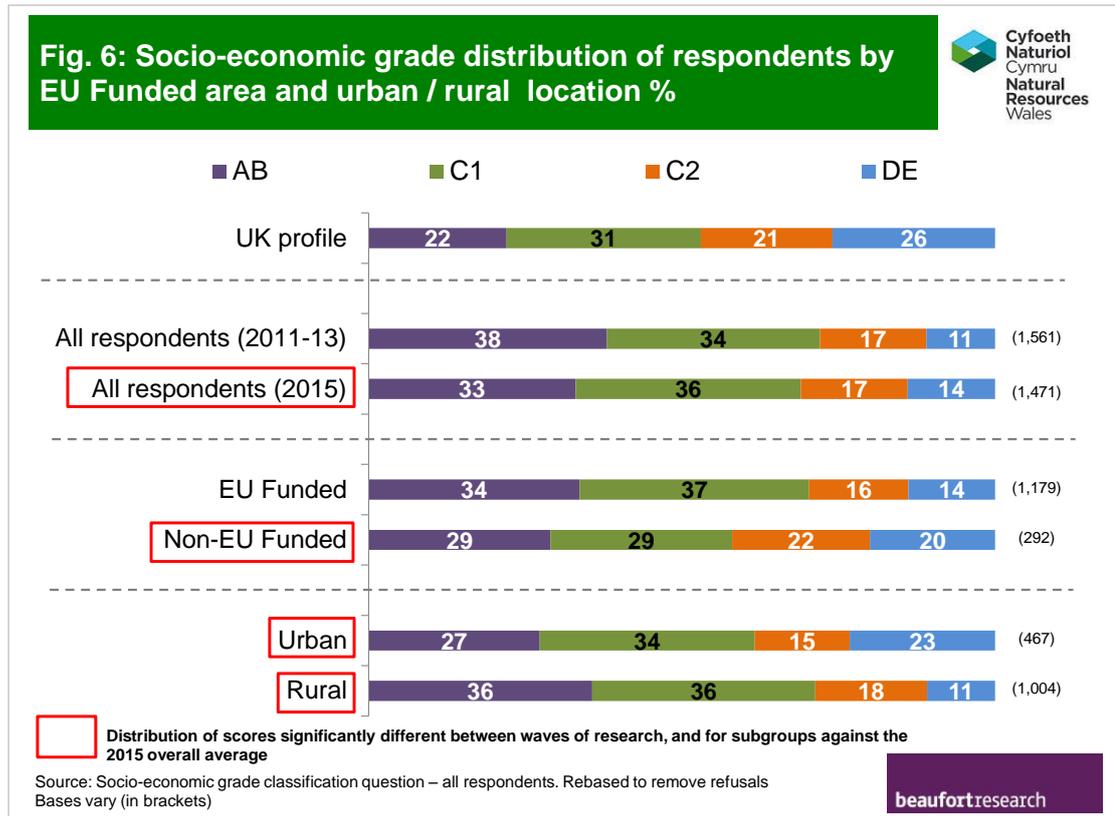


⁹ Source: Census 2011 data table QS611UK

¹⁰ ABC1: professional, managers and non-manual positions

¹¹ C2DE: skilled and non-skilled manual workers, those on benefits

There was a much higher propensity for respondents classed as ABC1 in EU Funded areas (71%) compared to Non-EU Funded areas (58%); moreover, ABC1 respondents were more prevalent in rural areas of the path (72%) compared to urban (61%). Where the distribution of scores varies significantly from the overall 2015 measure, these have been highlighted in red – see Figure 6 below.



Other demographics captured by the survey included working status, and ethnicity.

Although most respondents interviewed were working (50% full-time; 8% part-time), a third were retired (33%). Only 2% were in full-time education.

The ethnic profile of respondents was primarily White British / Welsh (94%); a further 4% described their ethnicity as ‘White other’, while just 1% belonged to BME¹² groups.

¹² BME: Black and minority ethnic

3.1.4 Group composition

Table 1 below provides a detailed break-down of the actual number of Wales Coast Path visitors covered by both waves of the research. Figures have been calculated by examining the number of people in each visitor group, rather than focussing solely on the respondent taking part in the interview; the data has been weighted (see Page 6 for an explanation of the weighting methodology).

Within the 1,483 user groups included in the 2015 research, there were 3,260 Wales Coast Path visitors; 2,843 adults and 417 children. Each group contained a mean average of 1.9 adults, and amongst those groups with children (250), there was a mean of 1.7 children per group. The mean number of visitors per group remains fairly consistent with the 2011-2013 survey data.

User groups at sections of the Path in Anglesey and Carmarthen Bay & Gower tended to have the largest mean number of adults per group (2.2 and 2.1 respectively). Along the North and South Coast sections of the Path, user groups contained a slightly lower mean number of adults (1.7 for each area). Mean children per group were highest in Gwynedd (1.9) and lowest along the North Coast (1.5).

Group sizes tended to be slightly larger in rural areas (2.0 adults, 1.7 children) than in urban areas of the Path (1.7 adults; 1.7 children) – see Table 1 below.

TABLE 1: Total numbers of visitors to the Wales Coast Path (respondents and other group members, inc. children)	Total user groups	Total groups with children	Total visitors in groups (adults and children)	Total adults	Total children (0-15 years)	Mean adults	Mean children (all visitor groups)	Mean children (visitor groups inc. children)
2011-2013 total	1,566	290	3,562	3,063	499	2.0	0.3	1.7
2015 total	1,483	250	3,260	2,843	417	1.9	0.3	1.7
North Coast	340	47	663	591	72	1.7	0.2	1.5
Anglesey	238	42	590	521	69	2.2	0.3	1.6
Gwynedd	138	24	307	262	45	1.9	0.3	1.9
Ceredigion	103	14	233	208	25	2.0	0.2	1.8
Pembrokeshire	164	30	362	314	48	1.9	0.3	1.6
Carmarthen Bay & Gower	240	50	578	494	84	2.1	0.4	1.7
South Coast	261	43	528	453	75	1.7	0.3	1.7
EU Funded	1,290	213	2,848	2,491	357	1.9	0.3	1.7
Non-EU Funded	193	37	413	352	61	1.8	0.3	1.6
Urban	458	57	881	788	93	1.7	0.2	1.7
Rural	1,024	193	2,379	2,055	324	2.0	0.3	1.7

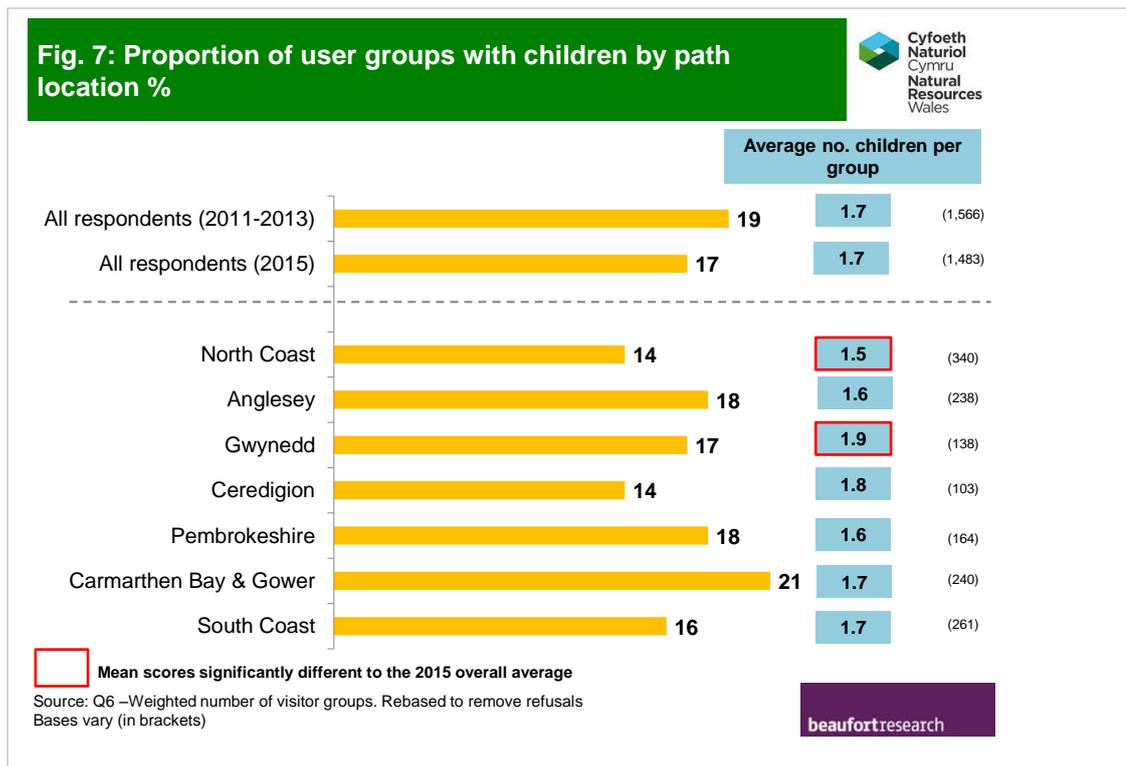
Mean scores significantly different to 2015 overall average

Source: Q6 – all members of groups (respondents and other group members) NB: weighted data

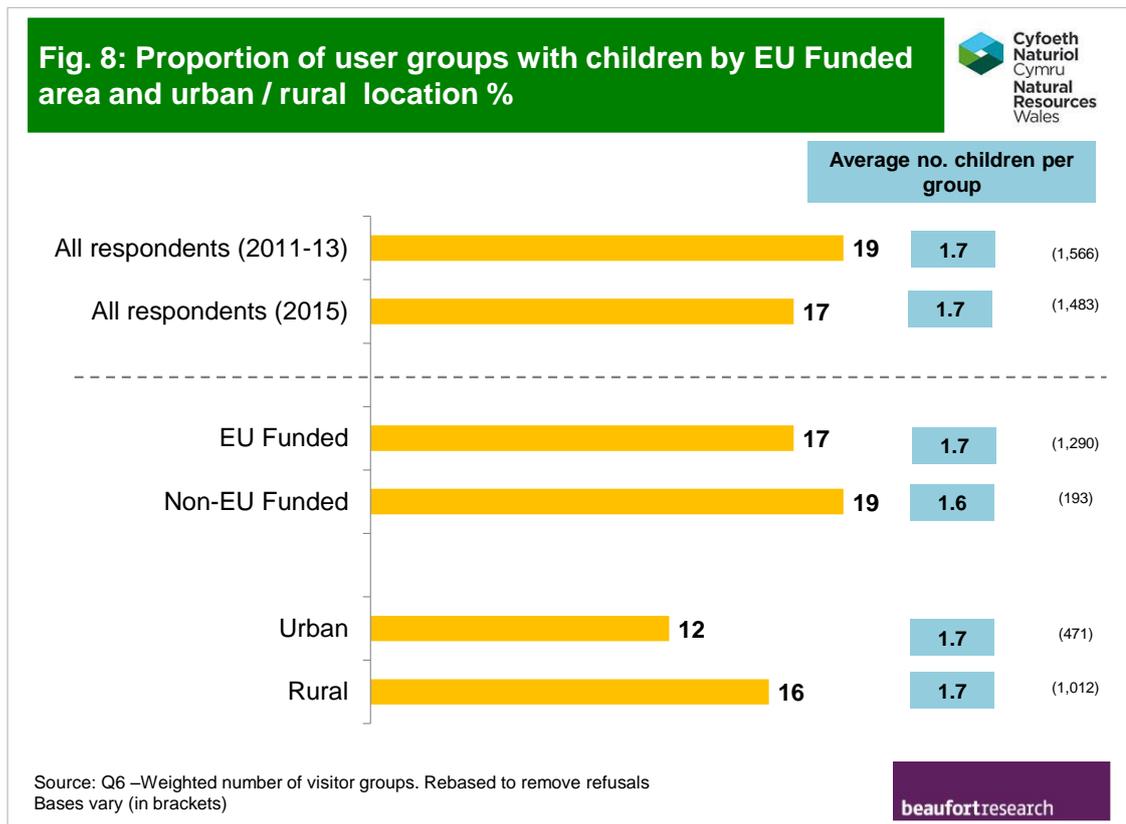
Following on from the data presented in Table 1, Figure 7 below shows the relative proportions of user groups included within the research that included children.

On the whole, around one in six user groups included children in 2015 (17%), down slightly on the 2011-2013 figure of 19%. As mentioned previously, there was a mean of 1.7 children per group in 2015 (equal to the 2011-2013 mean).

User groups using sections of the Path in Carmarthen Bay & Gower were most likely to contain children (21%; 1.7 children per group), while those using sections of the Path along the North Coast were least likely to contain children (14%). Moreover, along the North Coast, within groups that **did** contain children, the mean number of children per group was the lowest seen across all regions (1.5 children per group) – see Figure 7 below.



Groups using Non-EU Funded areas of the Path were slightly more likely to contain children (19%) than those using EU Funded areas (17%). In addition to this, groups using rural areas of the Path were more likely to contain children (16%) than those using urban areas (12%) – see Figure 8 below.



3.1.5 Area of residence

Table 2 below examines each area of the Wales Coast Path by the area of residence of all visitors. Overall, a slight majority of visitors of the Wales Coast Path resided in Wales (59%), although this proportion varied according to the section of the Path used.

For example, along sections of the Path in Anglesey and Gwynedd, the slight majority of visitors resided in England (54% and 53% respectively), whereas in other sections of the Path, there was a slight skew towards more visitors residing in Wales. The exception to this was the section of the Wales Coast Path located along the South Coast; in this area, over nine in ten visitors to the Path resided in Wales (92%), with only 7% visiting from England and 1% outside of GB.

Moreover, Wales residents tended to live fairly close-by to the section of the Path they were visiting; for example, 57% of visitors to the Path along the North Coast resided in North Wales, and 50% of visitors to the Path along the South Coast lived in Cardiff and South East Wales. England residents visiting sections of the Path in Anglesey, Gwynedd and along the North Coast tended to live in North West England – see Table 2 below for more details.

TABLE 2:								
Total numbers of visitors to the Wales Coast Path by area of residence	TOTAL %	North Coast %	Anglesey %	Gwynedd %	Ceredigion %	Pembroke-shire %	Carmarthen Bay & Gower %	South Coast %
Base sizes (total visitors: respondents and other group members, inc. children)	2,962	627	522	209	217	348	555	483
WALES	59	58	44	45	55	52	56	92
North Wales	23	57	42	44	1	-	<1	-
Mid & West Wales	10	-	-	-	49	29	14	3
South West Wales	13	1	1	-	1	5	33	33
The Valleys	2	-	<1	1	-	7	3	6
Cardiff & South East Wales	11	<1	<1	-	4	11	6	50
ENGLAND	38	41	54	53	35	45	39	7
North East England	<1	<1	-	-	-	1	-	-
North West England	13	22	31	23	5	3	1	<1
Yorkshire & Humber	2	4	3	5	3	1	-	1
East Midlands	3	3	2	1	3	4	5	-
West Midlands	8	10	6	16	14	7	6	2
East of England	2	<1	1	-	1	7	1	1
Greater London	2	<1	2	-	1	4	4	2
South East England	5	<1	8	7	3	8	10	-
South West England	4	1	1	2	4	10	12	1
SCOTLAND	<1	<1	-	-	-	1	-	-
NON-GB	3	1	2	3	9	3	6	1

Source: Q6 – all members of groups (respondents and other group members)

NB: weighted data. **Distribution of scores varies to extent that all difference are statistically significant**

Figure 9 below provides a graphic illustration of the residence of Path visitors, and clearly demonstrates that the Path attracts a high proportion of local visitors, with many residences clustered close to the coastal areas of Wales itself.

Figure 9: Map showing Wales Coast Path Areas of Residence

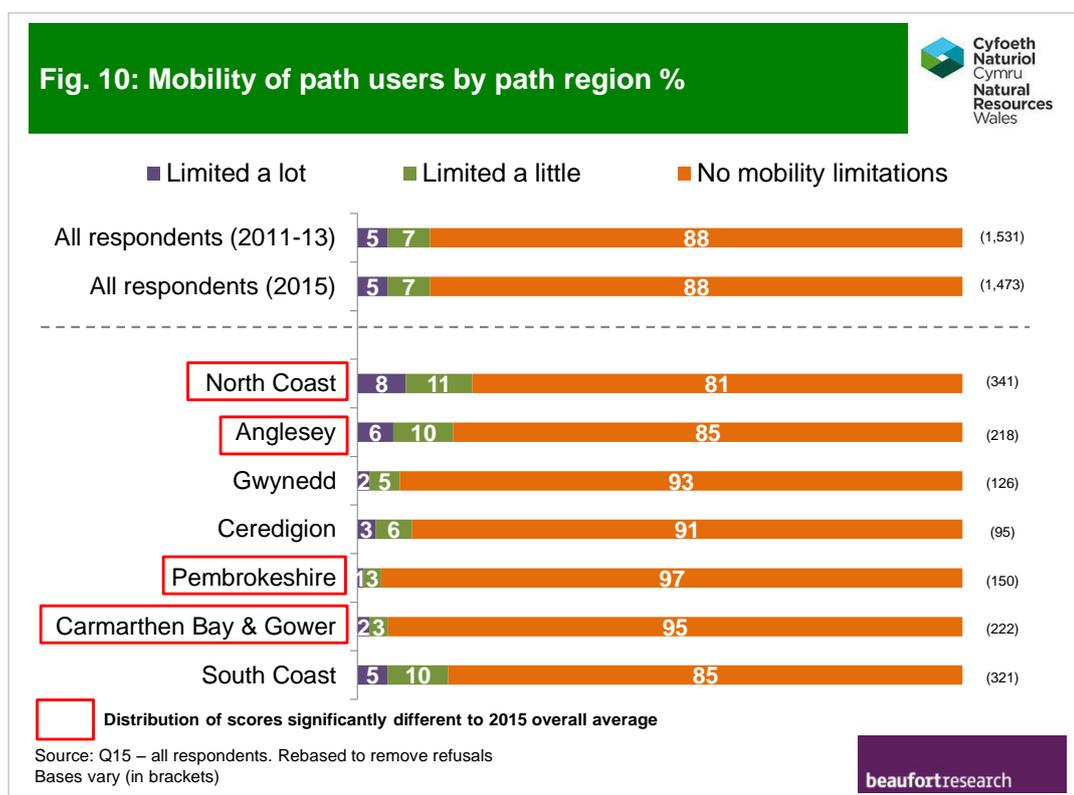


3.1.6 Mobility of Wales Coast Path visitors

The survey recorded whether visitors to the Wales Coast Path had health problems or disabilities (lasting longer than 12 months) that limited their day-to-day activities.

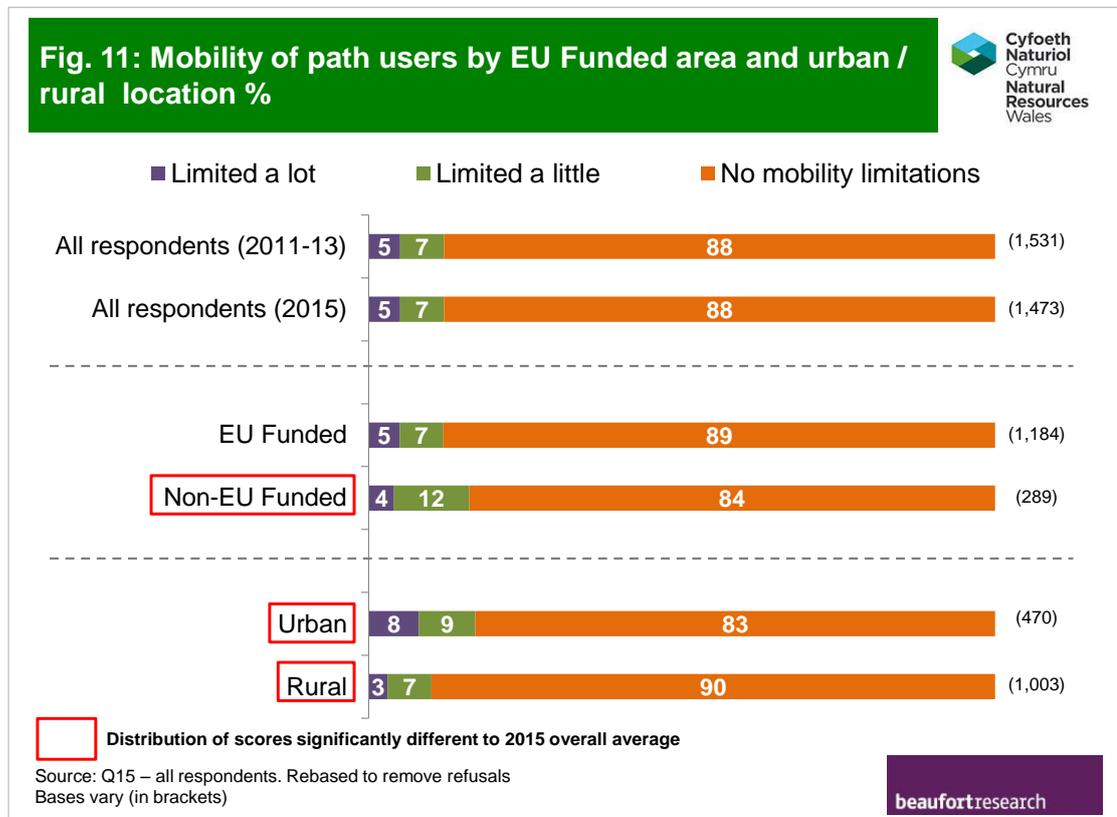
Only around one in ten respondents, in both waves of the research, described themselves or someone in their immediate party as having a limiting illness (12% for both surveys). The vast majority (88%) had no mobility issues.

Respondents and their party members along the North Coast were more likely to have a limiting illness (19%), whereas respondents / party members in Pembrokeshire and Carmarthen Bay & Gower were much less likely to have a limiting illness (4% and 5% respectively). This could possibly be linked to age; 21% of respondents aged 65+ had a limiting illness, and the proportion of respondents aged 65+ was highest along the North Coast (31%) and lowest in Carmarthen Bay & Gower (13%) – see Figure 10 below.



There were only very small differences in the proportion of respondents / party members with a limiting illness according to whether the section of the Path being used was located in EU Funded (12%) or Non-EU Funded areas (16%).

Respondent and members of their immediate party visiting along urban areas of the Path were almost twice as likely to have a limiting illness (17%) than those visiting rural areas of the Path (10%); this suggests easier access along urban Path sections compared to rural - see Figure 11 below.



3.2 Awareness of the Wales Coast Path

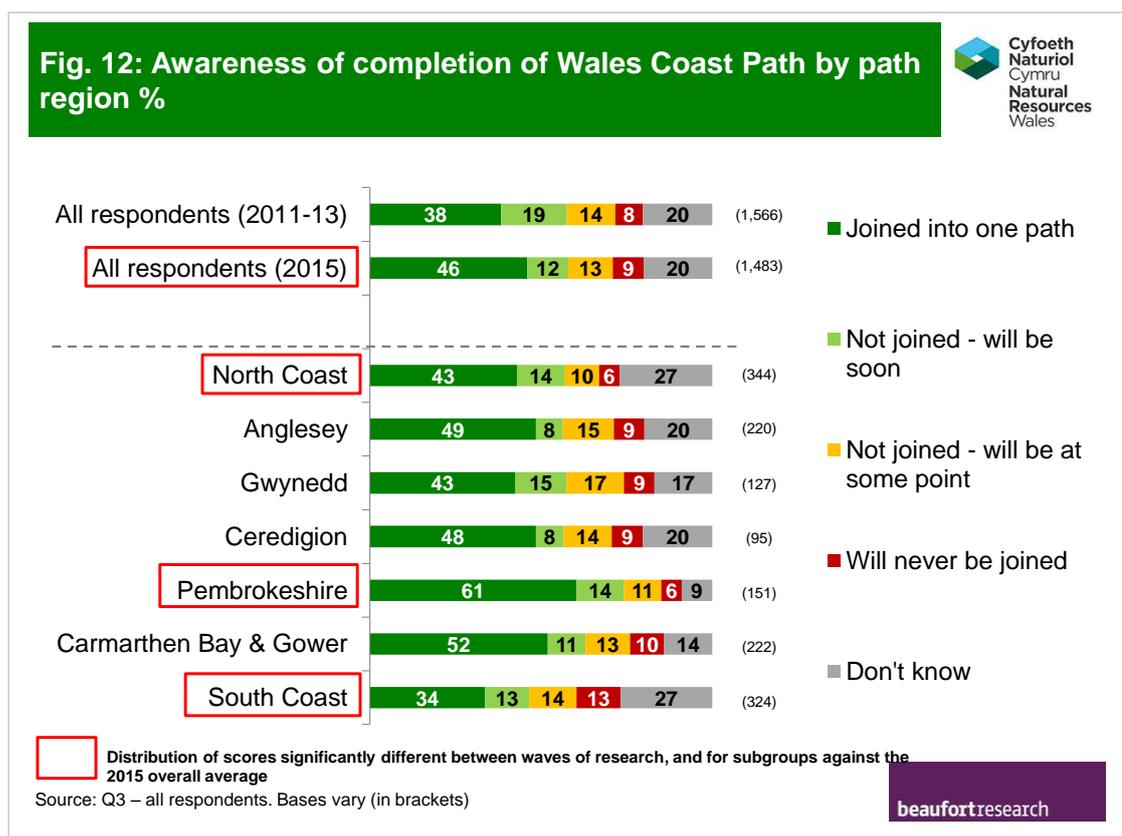
3.2.1 Awareness of the Wales Coast Path's completion

The Wales Coast Path was officially opening in May 2012; while fieldwork for 2015 was conducted after this official opening date, fieldwork for 2011-2013 spanned the period before and after the official opening.

Figure 12 below illustrates how awareness levels of the Path being joined into one have significantly increased by 8% since 2011-2013 (38% to 46% in 2015). However, the slight majority of respondents are still unaware of the unification of the Path (54%).

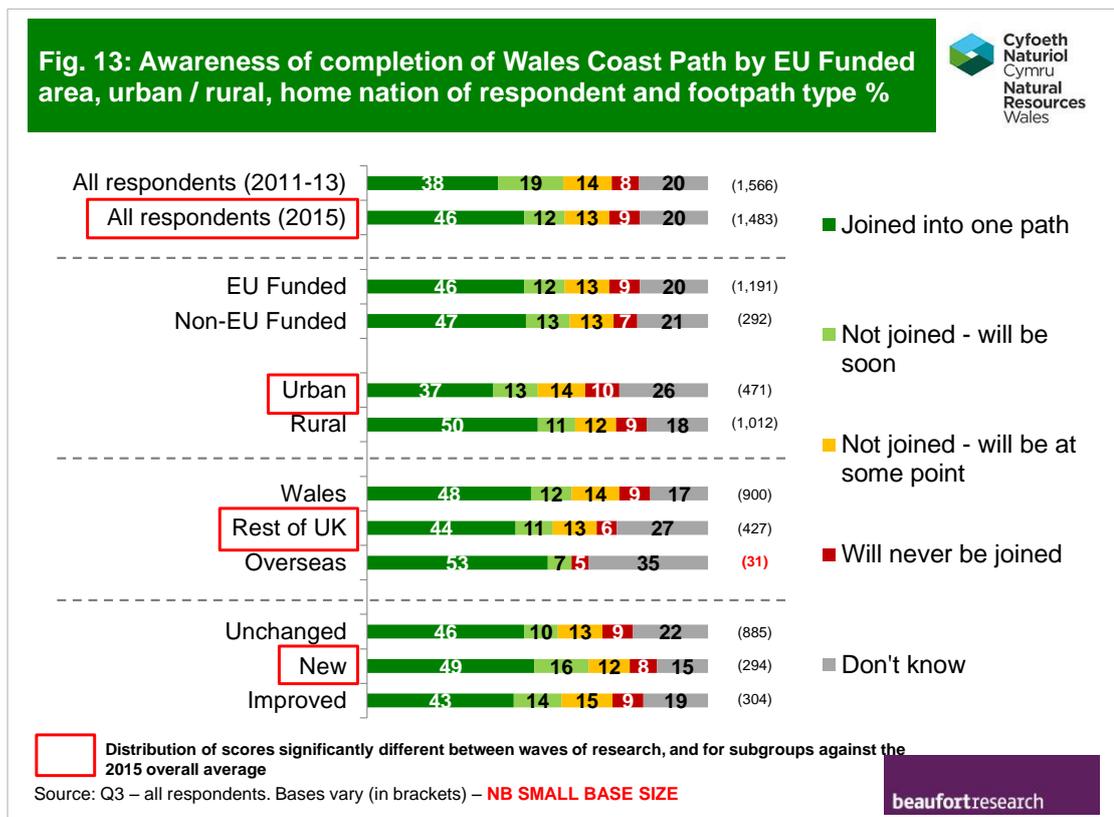
A quarter of respondents in 2015 thought that the Wales Coast Path was not currently joined but would be in future (25%), while around one in ten did not think that the Path would ever be joined (9%). Another fifth simply did not know about the status of the Path in terms of its unification (20%).

Awareness of the Path being joined into one was considerably higher amongst respondents using section in Pembrokeshire (61%), and lowest along the South Coast (34%); this latter finding is particularly interesting given that half of the respondents along the South Coast section of the Path live locally – see Figure 12 below.



Awareness of the unification of the Path was higher amongst respondents using rural sections (50%) compared to urban sections (37%); there were no significant differences in awareness by EU Funded / Non-EU Funded area.

Awareness that the Coast Path was joined was, as might be expected, slightly higher amongst those respondents residing in Wales (48%) compared to those residing in England (44%). While awareness was highest of all amongst non-GB respondents (53%), some caution is recommended when considering this data due to the very small base size (31 respondents) – see Figure 13 below.



There were a few other sub-group differences in levels of awareness of the Path being joined:

- Male respondents were more likely to be aware than female (49% cf. 43%);
- Those classed as ABC1 were more likely to be aware than those classed as C2DE (48% cf. 41%);
- Those aged 55+ were more likely to be aware (49%) than those aged 16-34 years (38%) or 35-54 years (44%).

3.2.2 Awareness of footpath type

The survey covered whether respondents believed that the stretch of Path they were on at the point of interview was unchanged, improved or a new section of the Path. The results are shown below in Table 3 against the location of the interview itself; the correct identifications are shown in green.

Over half of respondents on unchanged sections of the Path correctly identified the nature of the Path (53%); this has increased from 44% in 2011-2013. Another third correctly identified improved sections of the Path (35%; down from 45% in 2011-2013). Just 2% of respondents on a new stretch of the Path correctly identified it as such; this remains fairly unchanged since 2011-2013 (3%).

Therefore, fairly high proportions of respondents were unclear as to the nature of the Path they were using – see Table 3 below for more details.

TABLE 3:			
Respondents' perceptions of path type used	Actual path type where interviewed		
	Unchanged	Improved	New
	(885)	(304)	(294)
An unchanged existing section of the path	53	40	48
An improved section of the path	26	35	31
A new section of the path	2	8	2
Don't know	20	16	20

Source: Q4

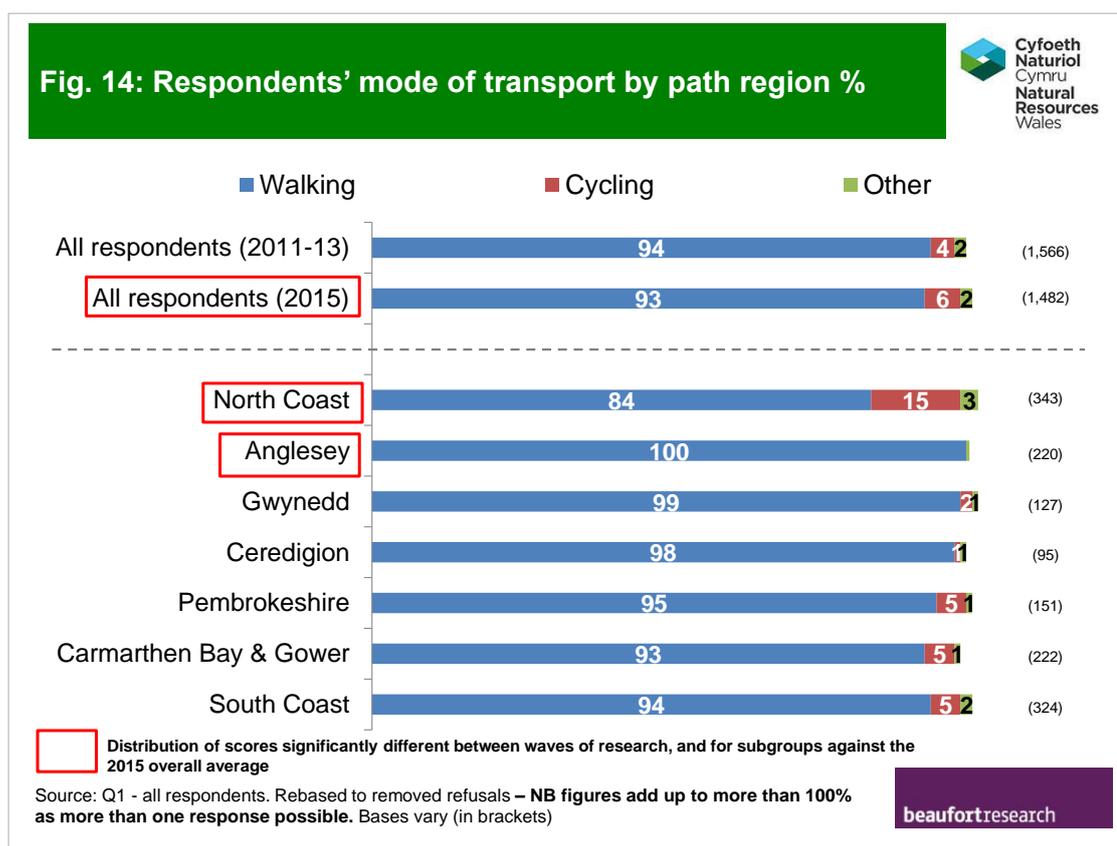
Bases in brackets: all respondents interviewed

3.3 Using the Wales Coast Path

3.3.1 Modes of transport used

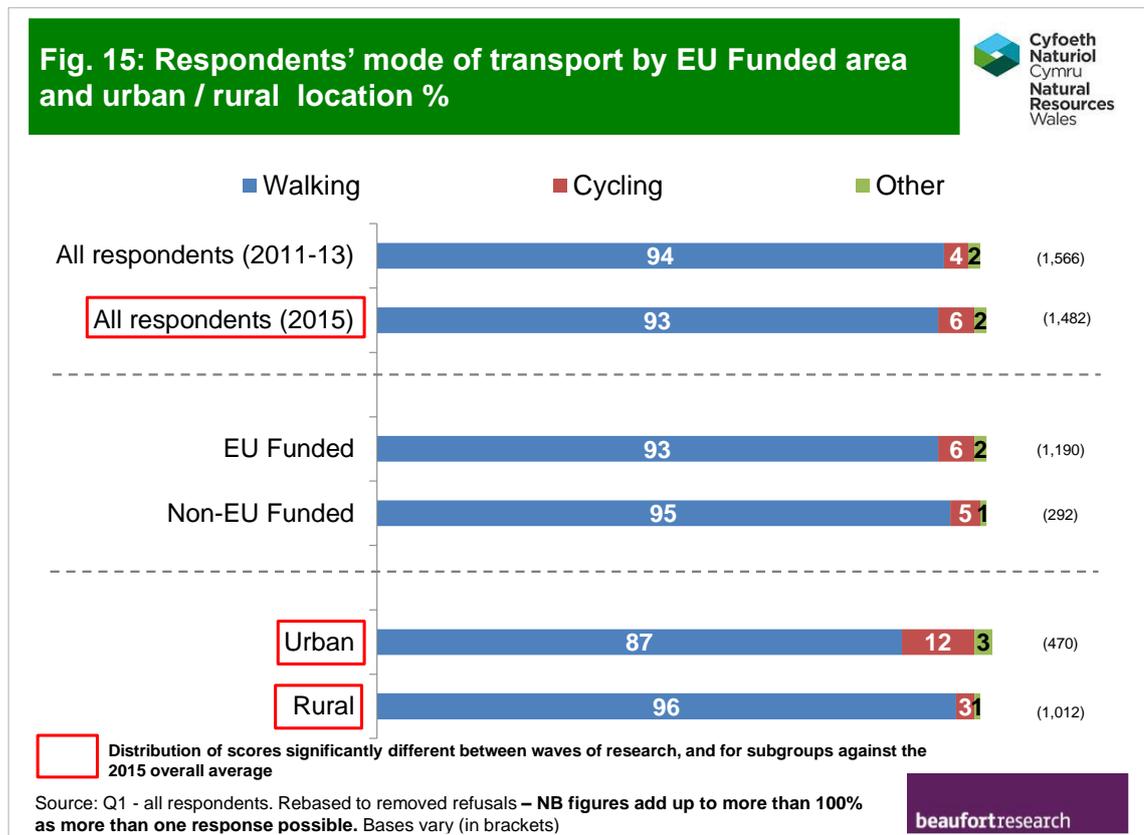
The vast majority of respondents were walking along the Wales Coast Path when interviewed in 2015 (93%); this is relatively unchanged from 2011-2013 (94%). Less than one in ten cycled (6%), although this has significantly increased since 2011-2013 (4%). A very small minority of 2% used other forms of transport (e.g. horse-riding, motorised vehicle, assisted / disability vehicle).

This pattern remained fairly consistent across all regions of the Path, although cyclists were much more prevalent along sections of the North Coast Path (15%) than in all other areas. In Anglesey, all of the respondents interviewed were walking along the Wales Coast Path (100%) – see Figure 14 below.



The overall pattern for modes of transport used was, on the whole, consistent with the overall proportions according to EU Funded / Non-EU Funded areas and urban / rural location.

There were, however, significantly more cyclists using urban sections of the Path (12%) compared to rural sections (3%) – see Figure 15 below.

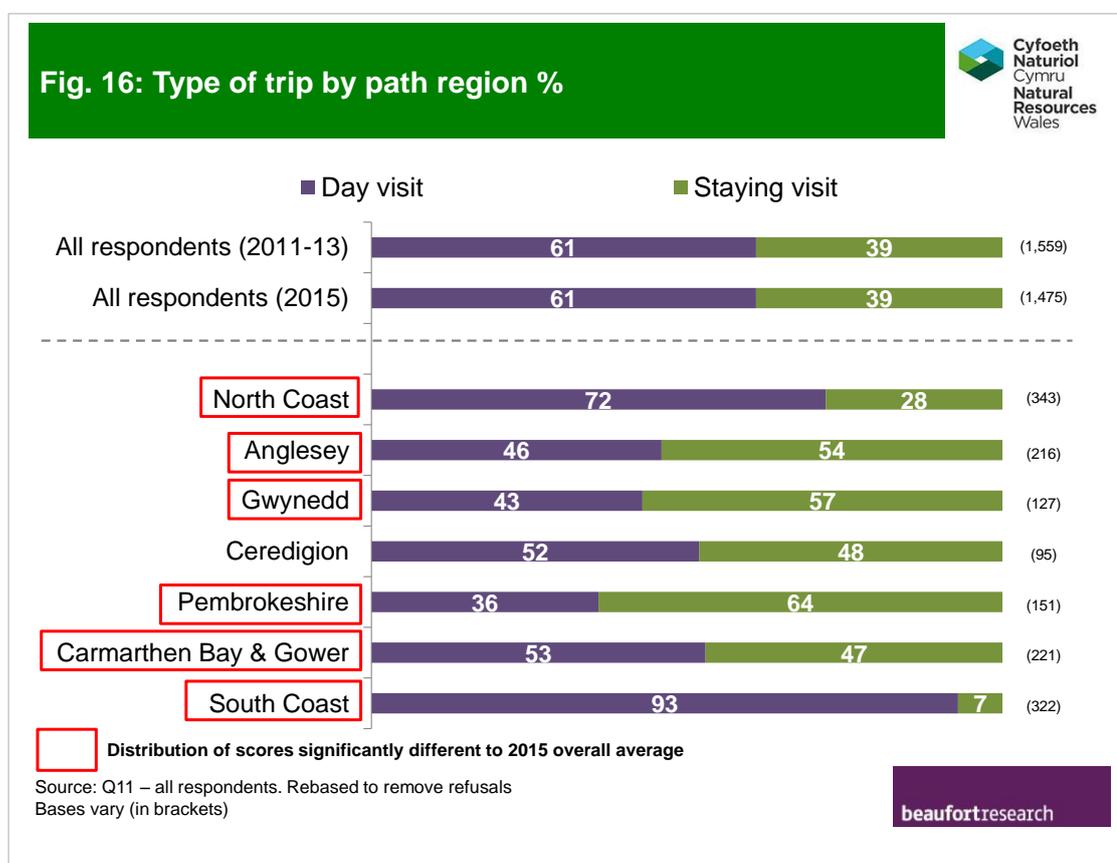


3.3.2 Type of trip

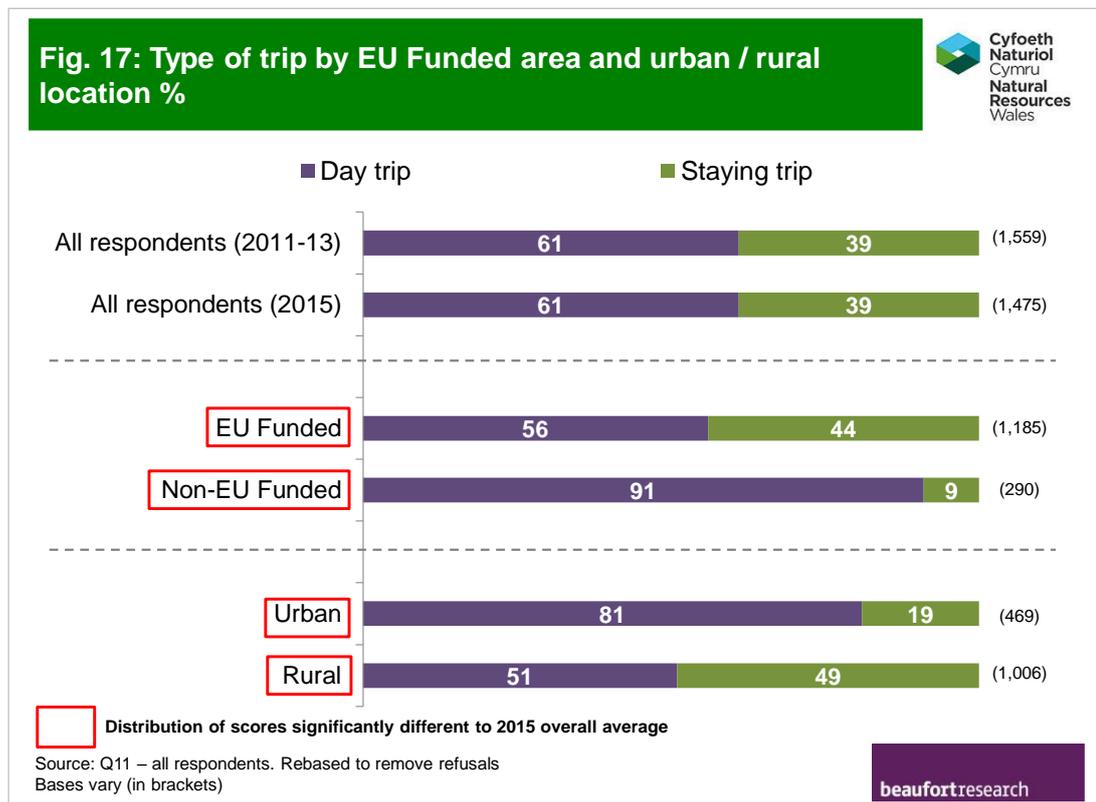
The overall proportion of respondents who were day-trip visitors or staying visitors (those staying overnight or as part of a longer holiday) remained unchanged between 2011-2013 and 2015; most respondents were day-trip visitors (61%), while around four in ten were staying visitors (39%).

There was, however, considerable variation in these proportions according to the area in which the Path was located. For example, the vast majority of respondents on sections of the Path along the South Coast were day-trip visitors (93%), linking to the finding that here, the vast majority of respondents resided either in Cardiff / SE Wales, the Valleys or South West Wales (89%). Also, seven in ten respondents interviewed along the North Coast were day-trip visitors (72%).

However, in Pembrokeshire, most respondents were staying in the area overnight or as part of a longer holiday (64%). Higher proportions of staying visitors were also seen in Gwynedd (57%), Anglesey (54%), Ceredigion (48%) and Carmarthen Bay & Gower (47%) – see Figure 16 below.



Respondents using the Path on a day-trip to the area were much more prevalent in Non-EU Funded (91%) and urban areas (81%) of the Wales Coast Path than EU Funded areas (56%) and rural areas (51%) - see Figure 17 below for more details.



As might be expected, staying visitors accounted for a much higher proportion of respondents during the summer months (50%) than across other times of the year. Moreover, they were most likely to belong to the more affluent socio-economic groups (AB = 48%).

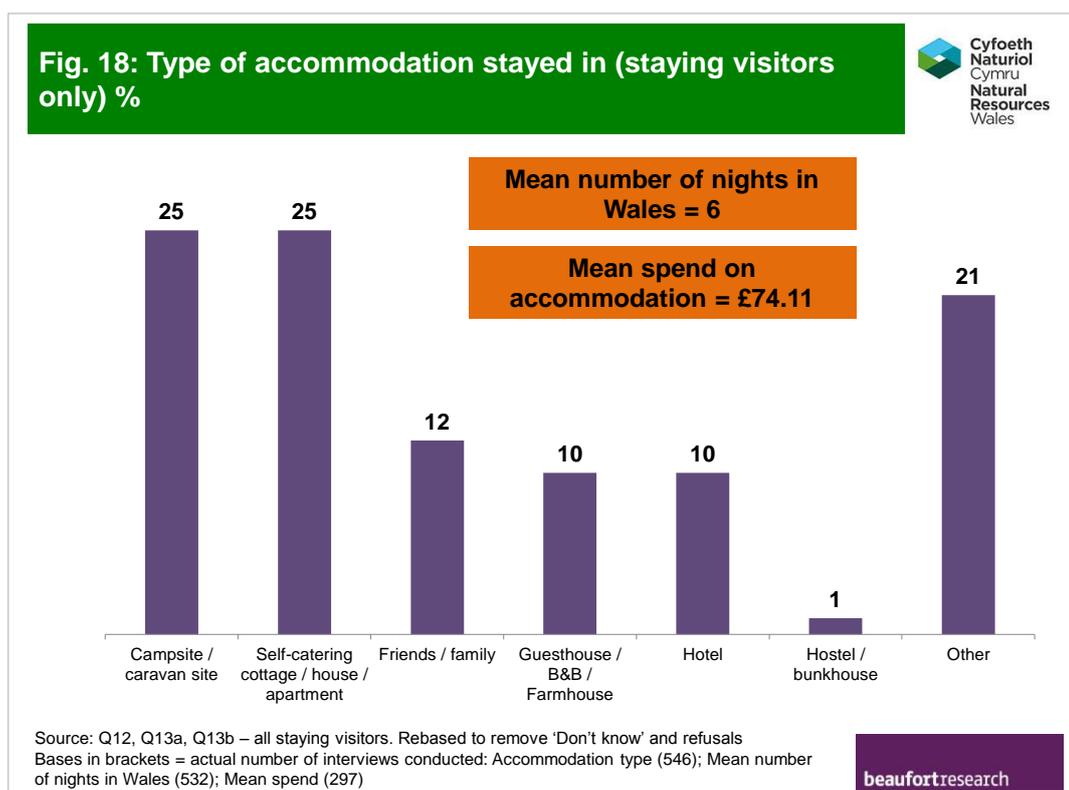
Day-trip visitors were more likely to be aged 65+ (69%) compared to younger age groups.

3.3.3 Accommodation used by staying visitors

Staying visitors were most likely to be spending their trip staying at a campsite / caravan site, or in self-catering accommodation (25% for each).

Roughly equal proportions (of around a tenth of staying visitors) were spending their holiday with friends / family (12%), in a guesthouse / B&B or in a hotel (10% for each); only a very small proportion were staying in a hostel (1%)¹³.

The mean number of nights spent in Wales was 6, and the mean spend on paid accommodation, per night, was £74.11 – see Figure 18 below.

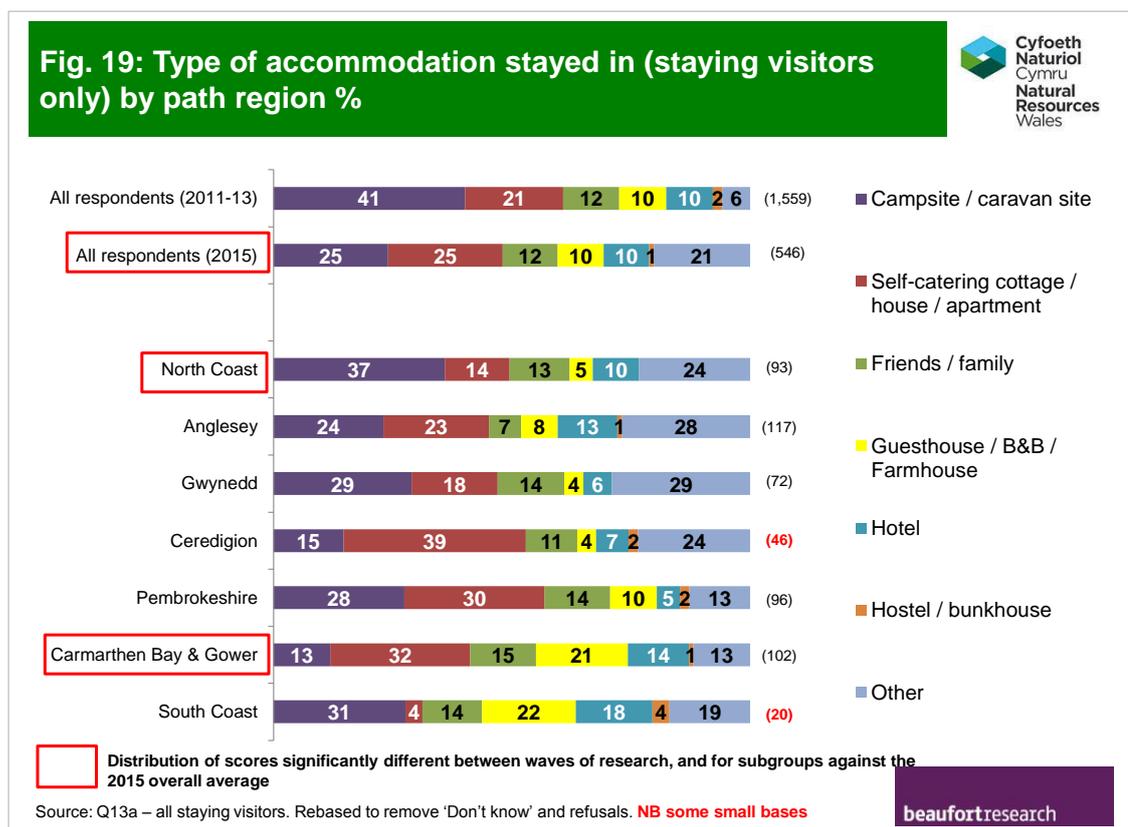


¹³ While a fifth of staying visitors reported that they were staying in 'other' accommodation, further analysis of the types of accommodation used was not possible, as this option was pre-coded and details of the type of accommodation used were not recorded.

The types of accommodation used by staying visitors have changed somewhat since 2011-2013. In the previous research, a much higher proportion of staying visitors were camping in Wales (41%) compared to the most recent research (25%), and fewer staying visitors were spending their holiday in self-catering accommodation (21% in 2011-2013 cf. 25% in 2015).

Returning to the most recent wave of research; there were some regional differences according to the type of accommodation used amongst staying visitors. A higher proportion of staying visitors using sections of the Path along the North and South Coasts were camping (37% and 31% respectively), and hence less likely to be staying in self-catering / serviced accommodation or with friends and family.

Staying visitors interviewed along sections of the Path in Carmarthenshire Bay & Gower were most likely to be using self-catering or serviced accommodation (68%) – see Figure 19 below for more details.



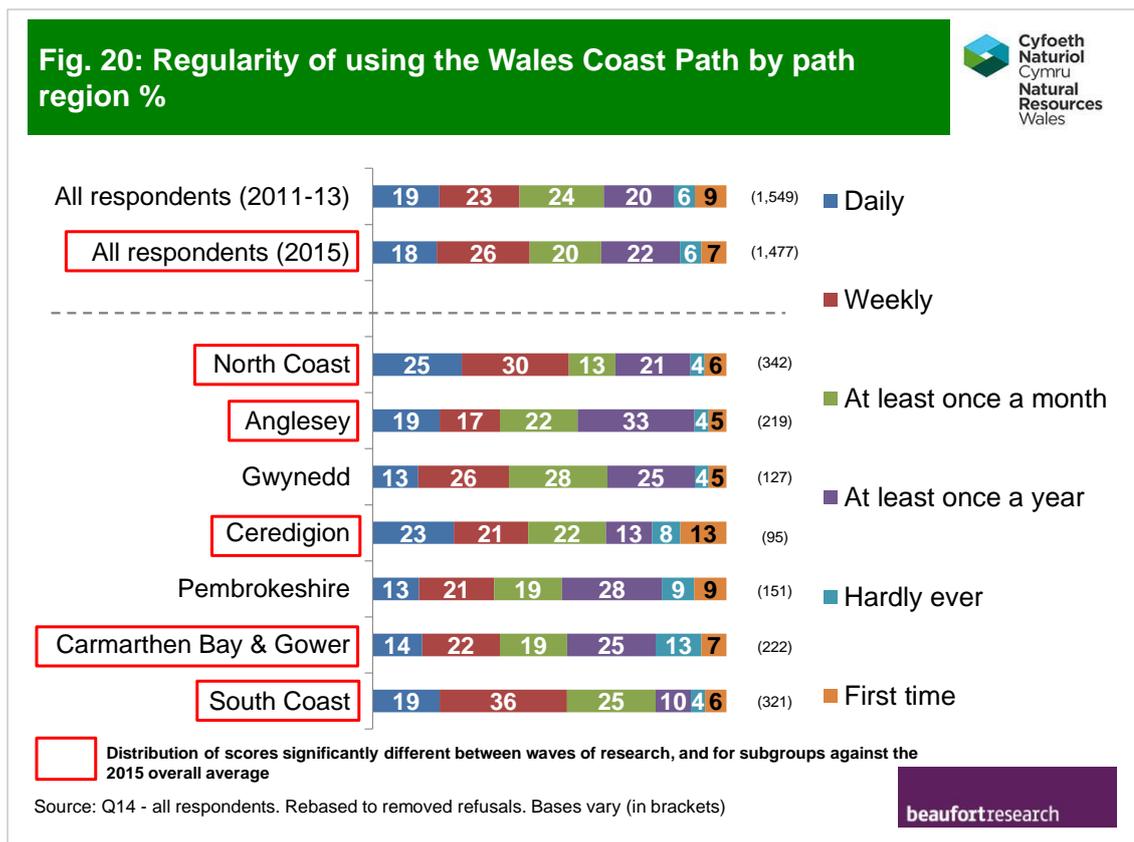
3.3.4 Regularity of using the Wales Coast Path

The vast majority of respondents in 2015 were repeat visitors to the Wales Coast Path (93% cf. 91% in 2011-2013). First-time visitors, therefore, accounted for just 7% of respondents in 2015 (rising to 13% in Ceredigion). Although the figures are fairly consistent with the 2011-2013 findings, the distribution of scores is significantly different in the 2015 wave compared to the previous survey.

On the whole, respondents tended to be fairly regular visitors to the Wales Coast Path, with nearly two thirds using the Path once a month or more often (64% in 2015 cf. 66% in 2011-2013).

Daily visitors to the Wales Coast Path in 2015 accounted for a fifth of the respondents interviewed (18%); this proportion has changed only slightly from 2011-2013 (19%). Daily usage of the Path was highest along the North Coast (25%) and in Ceredigion (23%). Weekly visitors accounted for around a quarter of all respondents (26%), while a fifth used a section of the Wales Coast Path at least once a month (20%).

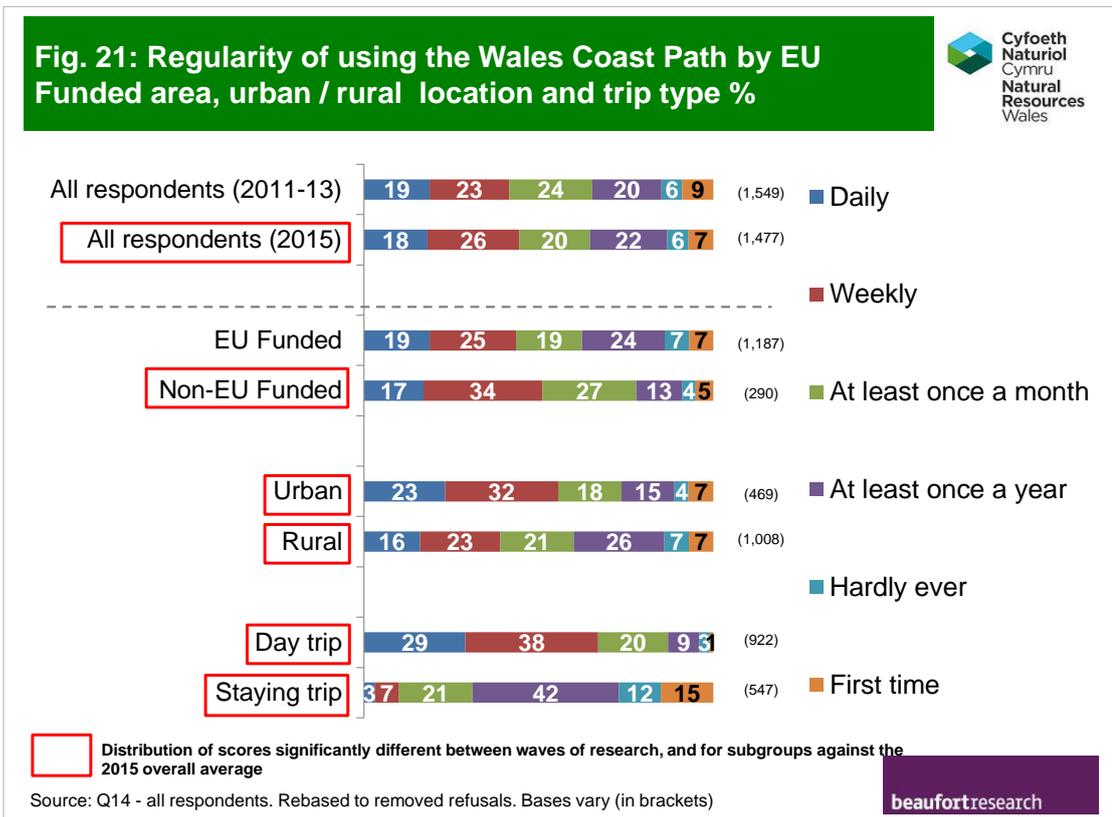
A further fifth used the Path at least once a year (22%), with infrequent visitors (hardly ever using the Path) accounting for just 6% of the sample; respondents using sections of the Path in Carmarthen Bay & Gower were most likely to 'hardly ever' use the Wales Coast Path (13%) – see Figure 20 below.



Respondents using the Wales Coast Path in EU Funded areas were **less likely** to be visiting on a regular basis (once a month or more often) than those in Non-EU Funded areas (63% cf. 78%). Also, respondents using the Path in urban locations were **more likely** to be visiting on a regular basis (73%) than those in rural areas (60%).

Virtually all day-trip visitors interviewed in 2015 were repeat visitors to the Wales Coast Path (99%); moreover, 85% of those staying overnight or as part of a longer holiday were also repeat visitors.

As might be expected, day-trip visitors were significantly more likely to use the Wales Coast Path at least once a week (67%) compared to staying visitors (10%); staying visitors tended to use the Path around once a year (42%) – see Figure 21 below.

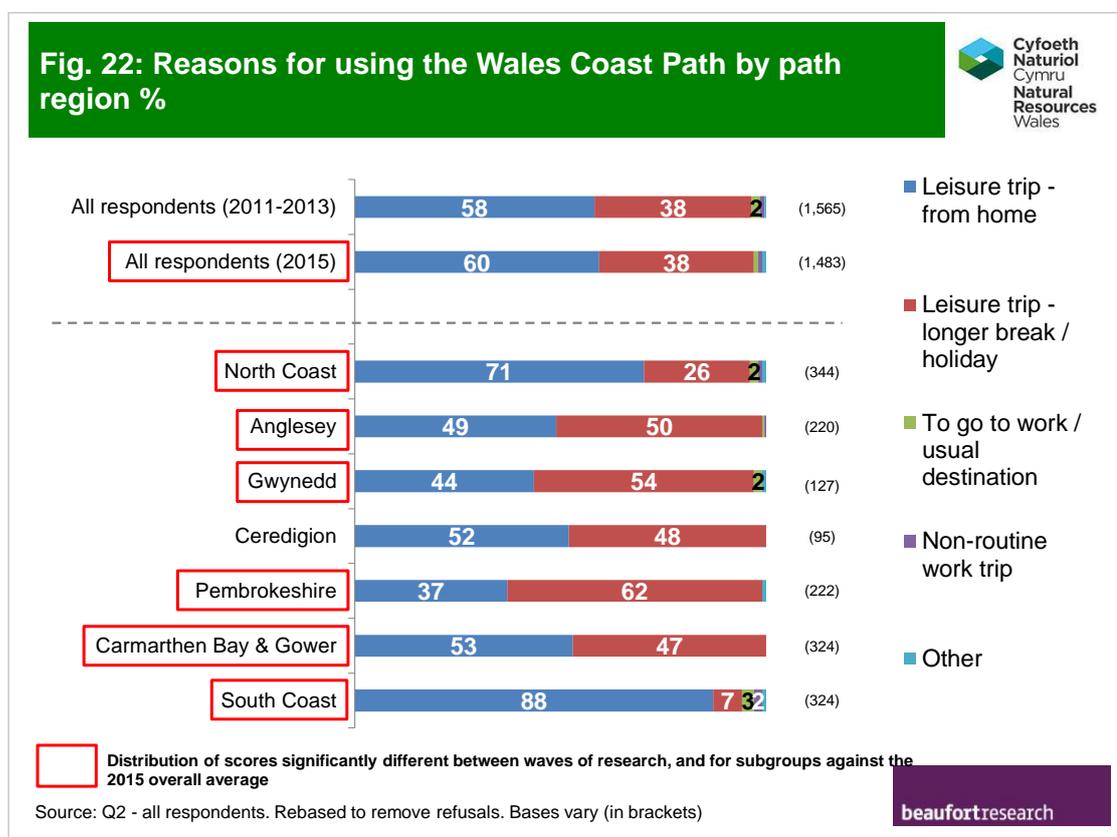


3.3.5 Reasons for using the Wales Coast Path

Reflecting previous findings, most of the respondents interviewed in 2015 were using the Path as part of a leisure trip from home (60% cf. 58% in 2011-2013). A further 38% were using the Path as a leisure trip as part of a longer break or holiday in Wales; this proportion is unchanged from the 2011-2013 figure.

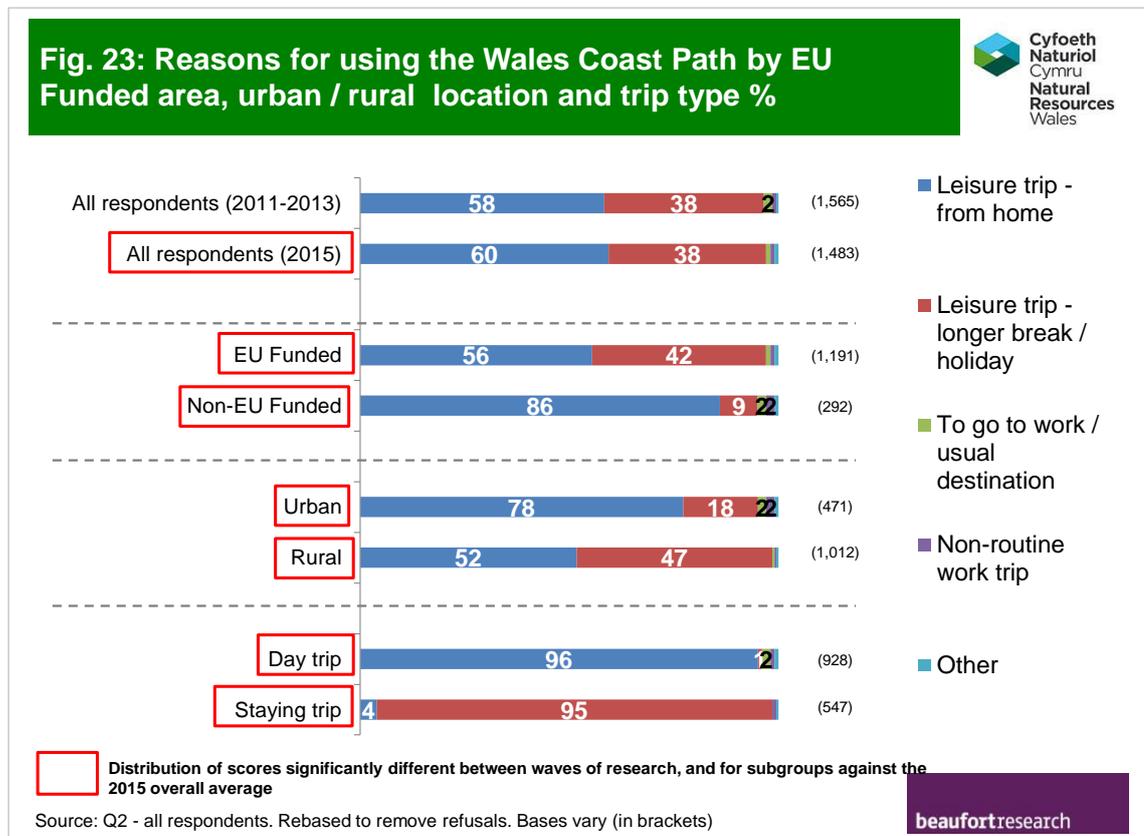
Using the Path to or from their usual place of work, or for non-routine work trip purposes was mentioned by only a very small proportion of respondents (2% and 1% respectively). The distribution of scores in 2015 is significantly different to 2011-2013.

Respondents using the Path along the South Coast were most likely to report that they were using the Path as part of a leisure trip from home (88%), while those using sections in Pembrokeshire were most likely to be using the Path for leisure as part of a longer break or holiday in Wales (62%) – see Figure 22 below for more details.



Respondents using the Path in Non-EU Funded areas were much more likely to be using the Path as part of a leisure trip from home (86%) than those using the Path in EU Funded areas (56%). There was a higher prevalence of holiday-makers in rural areas (47%) than urban (18%).

As would be expected, the vast majority of day-trip visitors were using the path as part of a leisure trip from home (96%), while the vast majority of staying visitors were using the Path for leisure as part of a longer break or holiday in Wales (95%) – see Figure 23 below.



3.3.6 Alternative action if section of Wales Coast Path had not been available

When asked what they would have done if they had not been able to access that particular stretch of the Wales Coast Path, most reported that they would have sought an alternative route for walking, cycling or horse-riding (77%, significantly higher than 73% in 2011-2013).

Just under one in twenty (4%) would have undertaken the journey using motorised transport, while a slightly higher proportion said they would not have made the journey at all (7%); those saying they would have abandoned their journey plans had they not been able to access the Wales Coast Path was highest amongst respondents interviewed along the South Coast (14%) – see Table 4a below.

TABLE 4a:										
Alternative action if section of Wales Coast Path had not been available	Total 2011-2013 %	Total 2015 %	North Coast %	Anglesey %	Gwynedd %	Ceredigion %	Pembrokeshire %	Carmarth -en Bay & Gower %	South Coast %	
	(1,492)	(1,443)	(338)	(212)	(125)	(94)	(151)	(214)	(309)	
% respondents										
Walked / cycled / horse ridden by another route somewhere else	73	77	63	65	82	86	85	93	79	
Undertaken the journey by car / van / bus / train etc.	11	4	4	4	5	6	7	1	5	
Not made the journey or gone walking / cycling / horse riding at all	9	7	6	4	7	5	7	6	14	
Other	7	12	28	27	6	2	1	-	2	

 Scores significantly different between waves of research, and for subgroups against the 2015 overall average

Source: Q5

Bases in brackets: all respondents interviewed. Rebased to remove 'Don't know' and refusals

There were some significant differences in the data according to EU Funded / Non-EU Funded areas, urban / rural areas and day-trip / staying visitors; for example, a much higher proportion of respondents in Non-EU Funded areas of the Path would not have made the journey (17%) compared to EU Funded (6%) – see Table 4b below.

TABLE 4b:								
Alternative action if section of Wales Coast Path had not been available	Total 2011-2013 %	Total 2015 %	EU Funded %	Non-EU Funded %	Urban %	Rural %	Day trip %	Staying trip %
	(1,492)	(1,443)	(1,161)	(282)	(451)	(992)	(895)	(540)
% respondents								
Walked / cycled / horse ridden by another route somewhere else	73	77	77	72	79	76	76	77
Undertaken the journey by car / van / bus / train etc.	11	4	4	5	8	7	3	6
Not made the journey or gone walking / cycling / horse riding at all	9	7	6	17	5	4	7	6
Other	7	12	13	6	8	13	13	10



Scores significantly different between waves of research, and for subgroups against the 2015 overall average

Source: Q5

Bases in brackets: all respondents interviewed. Rebased to remove 'Don't know' and refusals

3.3.7 Distance Travelled along the Wales Coast Path

The questionnaire contained a detailed map of the area surrounding the interview site with the route of the Wales Coast Path highlighted in red. Respondents were asked to mark-up the journey they were taking that day along the Path. The distance travelled was then calculated at Beaufort Research when the questionnaires were returned to the office.

The distance recorded represents the miles covered, and takes into account return journeys (where these have been indicated).

As shown in Table 5 overleaf, the mean stretch of the Path covered by respondents in 2015 was 2.9 miles; this is significantly higher than the 2011-2013 distance of 1.8 miles, although it must be noted that in the previous research, return trips were not included in the calculations (as this data was not captured). Highest mileage covered was recorded amongst respondents using the Path along the North Coast (mean 4.3 miles), while the lowest mileage covered was recorded amongst respondents using the Path on Anglesey (mean 1.9 miles).

Distances travelled along EU Funded areas of the Path were greater than those in Non-EU Funded areas (mean 3.0 miles cf. 2.2 miles), and greater across urban areas (mean 3.4 miles) compared to rural areas (mean 2.3 miles).

Staying visitors tended to travel longer distances along the Wales Coast Path (mean 3.2 miles) than their day-trip counterparts (mean 2.7 miles).

When asked if they would be doubling back along the section of the Wales Coast Path they had travelled, around three quarters said that they would (72%); this proportion rose to 81% along the North Coast sections of the Path, but dropped to 58% in Pembrokeshire – see Table 5 overleaf for more details.

Distance travelled along the Wales Coast Path in one direction	Base (respondents)	Mean miles	Mean kilometres	Doubling back along the Wales Coast Path?		
				Base (respondents)	Yes	No
2011-2013 total	(1,559)	1.8	2.9			
2015 total	(1,477)	2.9	4.7	(1,420)	72	28
North Coast	(343)	4.3	6.9	(330)	81	19
Anglesey	(220)	1.9	3.1	(206)	63	37
Gwynedd	(127)	2.0	3.2	(120)	65	35
Ceredigion	(94)	3.3	5.3	(91)	70	30
Pembrokeshire	(151)	3.2	5.1	(149)	58	42
Carmarthen Bay & Gower	(219)	3.0	4.8	(217)	76	24
South Coast	(323)	2.1	3.4	(307)	77	23
EU Funded	(1,186)	3.0	4.8	(1,145)	72	28
Non-EU Funded	(291)	2.2	3.5	(275)	70	30
Urban	(469)	3.4	5.5	(448)	74	26
Rural	(1,008)	2.3	3.7	(972)	71	29
Day trip	(923)	2.7	4.3	(890)	72	28
Staying trip	(546)	3.2	5.1	(524)	72	28

 Scores significantly different between waves of research, and for subgroups against the 2015 overall average

Source: Q7 and Q8

Bases in brackets: all respondents interviewed. Rebased to remove 'Don't know' and refusals

NB – Q8 (doubling back) not asked in 2011-2013 survey (2011-2013)

Looking at the data in more detail; as might be expected, those respondents cycling along the Wales Coast Path travelled longer distances than those who walked (11.1 miles cf. 2.4 miles). Those interviewed between the warmer months of April and September took longer trips along the Path than those interviewed between October and March (3.1 miles cf. 2.6 miles) and those aged 65+ travelled for shorter distances (2.4 miles) than those aged 35-54 years (3.1 miles) and those aged 55-64 years (3.3 miles). Saying that, younger respondents aged 16-34 also tended to travel shorter distances along the Wales Coast Path (2.6 miles).

3.3.8 Spend whilst on the Wales Coast Path

Respondents and their immediate party were asked how much they intended to spend while travelling along the section of the Wales Coast Path where they were interviewed, and on their entire trip (on that day).

In the most recent survey, respondents and their immediate party intended to spend a mean average of £4.63 along that section of the Path (significantly up from £3.52 in 2011-2013). Mean spend was highest along sections of the Path in Carmarthen Bay & Gower (£6.90) and lowest along sections of the North Coast Path (£2.19).

Mean spend was noticeably higher on sections of the Path in EU Funded areas (£4.88) compared to Non-EU Funded areas (£2.98), and higher in rural areas (£5.09) compared to urban areas (£3.62). Staying visitors intended to spend almost three times as much as their day-trip counterparts along the sections of the Path where they were interviewed (£7.50 cf. £2.79).

In terms of spend on the entire trip (excluding accommodation); respondents and their immediate party intended to spend a mean of £15.18, down slightly from the 2011-2013 figure of £15.62. Mean trip-spend was highest in Pembrokeshire (£27.34) and lowest along the North Coast (£6.99).

As stated previously, the mean spend, per night, on paid accommodation was £74.11 (down from £76.42 in 2011-13); this rose to £85.37 in Anglesey and fell to £52.63 along the North Coast.

Staying visitors in EU Funded areas of the Path tended to spend more on paid accommodation (£80.26) than those in non-EU Funded areas (£49.09); spend on accommodation in urban vs. rural areas was comparable – see Table 6 overleaf for more details.

TABLE 6: Mean spend while on Wales Coast Path	Base (respondents)	Mean spend along section of Coast Path	Base (respondents)	Mean spend on entire trip <u>excluding</u> accommodation	Base (respondents staying in paid accommodation only)	Mean spend on accommodation
Respondents and their immediate party						
2011-2013 total	(1,535)	£3.52	(1,489)	£15.62	(130)	£76.42
2015 total	(1,454)	£4.63	(1,372)	£15.18	(297)	£74.11
North Coast	(340)	£2.19	(335)	£6.99	(51)	£52.63
Anglesey	(216)	£6.35	(213)	£18.81	(56)	£85.37
Gwynedd	(125)	£3.39	(124)	£19.37	(28)	£70.11
Ceredigion	(95)	£3.66	(95)	£13.24	(28)	£65.11
Pembrokeshire	(143)	£6.68	(123)	£27.34	(56)	£78.82
Carmarthen Bay & Gower	(213)	£6.90	(171)	£22.58	(65)	£80.88
South Coast	(322)	£4.03	(311)	£9.29	(13)	£82.03
EU Funded	(1,164)	£4.88	(1,094)	£16.14	(282)	£80.26
Non-EU Funded	(290)	£2.98	(278)	£8.98	(15)	£49.09
Urban	(465)	£3.62	(460)	£9.55	(53)	£71.13
Rural	(989)	£5.09	(912)	£17.14	(244)	£74.73
Day trip	(914)	£2.79	(861)	£6.98		
Staying trip	(532)	£7.50	(504)	£27.81	(297)	£74.11
Per adult per visit						
EU Funded Day	(651)	£1.74	(607)	£4.49		
EU Funded Staying	(507)	£3.31	(482)	£12.24	(471)	£19.92
Non-EU Funded Day	(263)	£1.21	(254)	£2.87		
Non-EU Funded Staying	(25)	£4.88	(22)	£22.74	(23)	£20.63

Average amounts significantly different between waves of research, and for subgroups against the 2015 overall average

Source: Q10a, Q10b, Q13b

Bases in brackets: all respondents interviewed. Rebased to remove 'Don't know' and refusals
 NB – weighted spend along Coast Path and entire trip includes zeros (i.e. no-spend). Spend on accommodation **does not** include zeros, but weighted spend for those respondents staying in paid accommodation (**some small bases**)

“Per adult per visit” – Spend on accommodation does include zeros. Figure is for one night's accommodation cost.

3.3.9 Approach to risk and safety while on the Wales Coast Path

A new question was added to the most recent wave of the research, evaluating respondents' usual approach to risk and safety while using the Wales Coast Path.

They were presented with a list of statements, and asked which statement most closely described their approach:

- *I don't take any precautions as I don't see any risk in walking the Wales Coast Path;*
- *I don't take any precautions as I'm happy to live with a small amount of risk;*
- *I take some precautions and I'm happy to live with a small amount of risk;*
- *I take all necessary precautions and feel safe while walking.*

Most respondents reported that they took precautions while using the Wales Coast Path (65%); around a quarter took some precautions and were happy to live with a small amount of risk (27%), but a higher proportion of 38% took all necessary precautions to feel safe while walking.

Around a third of respondents did not take any precautions whilst using the Wales Coast Path (35%); most of these did not feel that using the Path posed any risk (26%), although 9% reported they were happy to live with some risk without taking precautions (9%).

Respondents interviewed along sections of the North Coast Path were most likely to take all necessary precautions to feel safe (49%), closely followed by respondents using the Path in Gwynedd (46%) and Anglesey (43%).

At the other end of the scale, respondents interviewed along sections of the Path in Pembrokeshire were most likely to take no precautions as they perceived no risk when using the Wales Coast Path (49%), closely followed by respondents using the Path along the South Coast (45%).

Respondents using the Path in EU Funded areas were more likely to take all necessary precautions to feel safe compared to their counterparts using the Path in Non-EU Funded areas (40% cf. 27%) – see Table 7 overleaf for more details.

TABLE 7:

Precautions taken while on the Wales Coast Path	Base (respondents)	No precautions – no perceived risk	No precautions – will live with some risk	Some precautions – will live with some risk	All precautions to feel safe
% respondents					
2015 total	(1,455)	26	9	27	38
North Coast	(341)	15	7	30	49
Anglesey	(218)	10	9	39	43
Gwynedd	(126)	10	4	40	46
Ceredigion	(94)	33	12	29	27
Pembrokeshire	(150)	49	13	21	18
Carmarthen Bay & Gower	(221)	29	12	23	36
South Coast	(305)	45	6	12	37
EU Funded	(1,177)	23	9	28	40
Non-EU Funded	(278)	45	8	20	27
Urban	(456)	27	5	24	44
Rural	(999)	26	10	29	36

 Scores significantly different for subgroups against the 2015 overall average

Source: Q16

Bases in brackets: all respondents. Rebased to remove 'Don't know' and refusals

SECTION B: THE ECONOMIC IMPACT OF COASTAL WALKING IN WALES 2014

NOTE: Visitor volume estimates in this section are based upon the results of existing surveys – The Great Britain Day Visits Survey 2014 and the Wales Outdoor Recreation Survey 2014. The figures cover all walking at the coast, not just that specifically on the Wales Coast Path. See Appendix A for information on the methodology.

1. Introduction

This section considers the economic impact on the Welsh economy of visitor spending connected with coastal walks in Wales. A large proportion of these walks would, to some extent, have involved walking on the Wales Coast Path. The estimation of economic impact combines the direct and indirect economic impacts, and reports on the gross value added and employment arising from the spending in Wales of visitors who take part in coastal walking.

The estimates of economic impact are derived from an application of the Welsh Economy Research Unit's (WERU) Welsh Input Output Tables. This resource models the trading interactions of companies and other economic actors within the region and provides an assessment of the direct and indirect expenditure impacts of established sectors and new infrastructure.

Sources of economic impact of walkers at the Welsh Coast and Wales Coast Path

There are a number of challenges in measuring the economic impact of spending by coastal walking visitors. These include the fact that a relatively high proportion of such expenditures take place in the shops and accommodation provision of nearby towns, not on the coast or the Wales Coast Path itself. Furthermore, the Wales Coast Path is in part an 'enabling' feature that provides access to other tourism sites, so that deriving an economic impact for the Path alone presents challenges.

This makes it difficult for tourism locations such as the Path to match up against traditional public sector interventions and win continued support. In recent years, there has been a need to evaluate the economic value of the Path in order to meet funding requirements. The work contained in this section follows previous studies in 2012 and 2013 on the economic impact of the Wales Coast Path that were in part generated to meet such needs, and with these reporting results in terms of EU Funded and Non-EU Funded areas of the Welsh coast. However, data on visitor numbers used in these Wales Coast Path economic impact estimations were limited to people counter data, which presented a very conservative overall measure.

This study examines the spending generated by all visits to the Welsh coast for walking and incorporates a visitor total estimation compiled by Natural Resources Wales from data from official sources (see Appendix A).

The main research objective of this Cardiff Business School work is to estimate the economic impacts for Wales of visitor spending related to walking at the Welsh coast. Given the above comments about the economic impacts arising away from the tourism destination, this report will talk to the coast's role in terms of contributing to overall impact. Technical explanations and methodology for the study are given in Appendix B.

As well as impacts in terms of leveraging tourism spending it is important to recognise that the Wales Coast Path itself also involves considerable amounts of capital spending, in large measure, on construction type activity. Included in the appendices of this report is an estimation of the economic impacts on the Welsh economy of the capital spending on the Wales Coastal Path over the financial year 2014-15 (see Appendix C).

2. Definitions

Economic impacts can be measured in terms of Direct Spending, Net Expenditure, Additional Output, Gross Value Added (GVA) and Employment. These are highlighted in Table 2.1.

Table 2.1: Definitions of Economic Impact Measures

Measure	Description
<i>Direct Spending</i>	The value of the goods and services directly purchased by walking visitors to the Welsh coast.
<i>Net Expenditure</i>	The value of the goods and services directly purchased by walking visitors to the Welsh coast after taxes and imports have been accounted for.
<i>Additional Output</i>	The value of the goods and services produced in the local economy as a result of walking visitors' expenditure attributable to the Welsh coast.
<i>Gross Value Added (GVA)</i>	An indicator of the value of activity supported. It is largely made up of wages and salaries, and company profits.
<i>Employment</i>	<p>The number of jobs that are supported in Wales as a result of the spending of walking visitors on their trip to the Welsh coast.</p> <p>These are reported as <i>Full Time Equivalent</i>s (FTEs), a measure that involves converting any part-time jobs into comparable full-time jobs (e.g. typically around 2 part-time jobs equal one full-time job).</p>

The core economic benefits of coastal walking visitor spending were examined using an economic impact model of Wales that estimates the indirect impacts of this expenditure (see Appendix B for more details).

Defining Visitor Volumes

A full description of how Natural Resources Wales calculated the visitor volume estimate for walking activities at the Welsh coast is given in Appendix A. In this estimate, each day an individual made a trip to the Welsh coast for walking was counted as a single visit.

Visitor volume estimates from Natural Resources Wales' calculations, which were derived from the latest sources of data available, indicate that there were 43.447 million visits to the coast in Wales for walking activities in 2014. Table 2.2 shows that there were 37.877 million adult visits.

Analysis of the Great Britain Day Visits Survey (2014) by Natural Resources Wales (also Appendix A) found that the percentage of visits to the EU Funded Area was 78% (or 29.544 million adults) with the remaining 22% of visits to the Non-EU Funded Area accounting for 8.333 million adult visits.

Table 2.2: Summary of Visitor Volumes to the Welsh Coast 2014

	Visits for coast walking in Wales (millions)
GB Resident Adults – Trips of over 3 hours duration	14.861
Wales Resident Adults – Trips of under 3 hours duration	22.630
Non-GB Resident Adults	0.386
Accompanied Children visits	5.570
Total Visits	43.447
<u>Of which: Adult Visits</u>	37.877
<i>Adult Visit breakdown by Area:</i>	
EU Funded Area Adult Visits (78% of all)	29.544
Non-EU Funded Area Adult Visits (22% of all)	8.333

To derive how these totals were split between day visitors and overnight visitors, data from the Wales Coast Path Visitor Survey 2015, undertaken by Beaufort Research was used (Figure 17 in the *Visitor Survey Analysis*). Here, 44% of EU Funded Area, and 9% of Non-EU Funded Area visitors noted that their trips were overnight.

Table 2.3 below therefore shows that of the 29.544m adult visits in 2014 to the EU Funded Area of the coast in Wales for walking, 12.999 million were overnight visits and 16.545 million were adult day visits; similarly, there were an estimated 0.750 million overnight adult visits and 7.583 million adult day visits in the Non-EU Funded Area in 2014.

Table 2.3: Walking Visitor Volumes to the Welsh Coast by Type of Visit 2014

	Adult visits for coast walking (millions)	% Overnight stay	Adult <u>Overnight</u> visits for coast walking (millions)	Adult <u>Day</u> visits for coast walking (millions)
EU Funded Area	29.544	44	12.999	16.545
Non-EU Funded Area	8.333	9	0.750	7.583
Total	37.877		13.749	24.128

3. Measures of Impact

Note: This section is based on whole trip spend. For information relating to on path spend only see Appendix E.

In this section we bring together the findings from the analysis of the survey sources (described briefly above and in detail in Appendix B). Using these sources we estimate the direct spending associated with visitors to the Welsh coast who are involved in walking activities, and then estimate the indirect economic effects associated with this spending.

3a. Direct Spending

Day trips

Data taken from the Wales Coast Path Survey 2015 by Beaufort Research, and reported above in Section 'A', Table 6 (bottom panel), shows that average expenditure per adult per day visit was £4.49 in EU Funded Areas and £2.87 in Non-EU Funded Areas. Here spend on the entire trip on the day of their visit (including expenditures along the route as well as fuel costs to and from the coast, parking, food and drink, and souvenirs was used) for each party was added up and divided by the total number of adults in the cohort. (A comparison of changes in average spending per adult visit between the 2013 and 2015 Wales Coast Path surveys is included in the appendices of this report as Appendix D).

These 'average per adult, per day visit' spending figures were then grossed up by the total annual number of day visits attributable to walking at the Welsh coast to derive a gross annual spending for these trips. Table 3.1 shows that around £96.1m of direct spending was attributable to visitors to the Welsh coast for walking.

Table 3.1: Direct Spend by Adult Coastal Walkers on a Daytrip in Wales (2014)

	Average Day Spend per Adult Visit (£)	Adult Day visits for coast walking (millions)	Direct Spend for Day visits (£m)
EU Funded Area	4.49	16.545	74.3
Non-EU Funded Area	2.87	7.583	21.8
Total	3.98	24.128	96.1

Overnight trips

For adult visits for walking to the Wales coast that involved an overnight stay, an average spend per visit per adult for each area needed to be derived. To calculate the proportion of spending that could be attributed to walking at the Welsh coast (rather than other visitor attractions the tourists may have visited) one night's expenditure for each trip was assumed to be coast walking related (a conservative estimate).

Data taken from the Wales Coast Path Survey 2015 by Beaufort Research, and reported above in Section A, Table 6 (bottom panel), shows that average expenditure per adult per staying visit in EU Funded Areas was £12.24 on goods and services (excluding accommodation) and £19.92 on accommodation costs. Adding these together indicates a total per adult per overnight visit spend of £32.16. The corresponding spend for Non-EU Funded Areas was £43.37 (£22.74 on non-accommodation goods and services, added to £20.63 on accommodation). Grossing these figures up by the estimates of annual visits to the respective areas (the third column of Table 3.2), indicates that a contribution of £450.5m was spent through overnight coastal walking visits to Wales in 2014.

Table 3.2: Direct Spend by Adult Coastal Walkers who stayed overnight away from home in Wales (2014)

	Average Overnight spend per Adult Visit (£s)	Volume of staying individuals (millions)	Direct Spend for Overnight Visits (£s millions)
EU Funded Area	32.16	12.999	418.0
Non-EU Funded Area	43.37	0.750	32.5
Total	32.77	13.749	450.5

Summary of Direct Spending by visitors to the Welsh Coast for walking 2014

The total volume of coastal walking visitors and their associated spending was calculated from the data outlined above and is summarised in Table 3.3. It is estimated that the direct spending associated with the 37.877m Welsh coastal visits undertaken for walking by adults in 2014 was around £546.6m. The EU Funded Area spending was estimated at £492.3m, and the Non-EU Funded Area £54.3m.

We have provided point estimates based on available data here, but it is more likely that a range of economic outcomes might be more sensible i.e. 10-15% either side of the values quoted.

Table 3.3: Total trip volume and direct spending by visitors to the Welsh coast for walking 2014

Area	Volume of Adults (millions)	Average expenditure per adult per visit (£)	Total Welsh coast walking related direct spending (£m)
EU Funded Area Day Trips	16.545	4.49	74.3
EU Funded Area Overnight	12.999	32.16	418.0
EU Funded Area Total	29.544	16.66	492.3
Non-EU Funded Area Day Trips	7.583	2.87	21.8
Non-EU Funded Area Overnight	0.750	43.37	32.5
Non-EU Funded Total	8.333	6.52	54.3
TOTAL WELSH COAST	37.877	14.43	546.6

The figures in Table 3.3 are used for the basis of the analysis of economy wide effects associated with this level of tourism consumption.

3b. Net Expenditure

The direct spend of visitors to the Welsh Coast for walking activities in 2014 is estimated at £546.6m. Some of this spending goes on goods and services that are imported into the Welsh economy, and some 'leaks' out in the form of taxes.

The direct spending figure (£546.6m) was firstly discounted for leakages such as taxes (including VAT), and spending on goods and services that are imports to Wales. For example, with walking related goods bought in Wales but manufactured elsewhere (typically including jackets and boots), only a small element of the related spend is likely to be maintained in the region. Here only the retail profit margin will be kept in Wales.

The Welsh Tourism Satellite Account was used to inform the levels of import propensity. The Tourism Impact Planning Model for Wales shows that, for day trip visitors in the region, around 35% of their expenditure is taken up by goods and services imported from the rest of the world (outside of the UK), and production taxes. These monies are therefore leaked out of the calculations for estimating the economic impact of visitors to the Welsh coast for walking activities on Wales. Similarly, from the Tourism Impact Planning Model for Wales, around 25% of the monies spent by overnight stay visitors are shown to leak out of the Welsh economy (due to spending on non-Welsh goods and services, or taxes). The leakages (taxes plus direct imports) were here estimated at around £146m.

Once these leakages are removed, the remaining net expenditure resulting of £401m is an injection into the Welsh economy, which businesses receiving these monies then re-spend in successive indirect rounds (e.g. accommodation providers purchase goods and services from other Welsh sectors to meet the needs of their visitors, causing these suppliers to then purchase outputs from elsewhere, and so on). The

resulting increase in the output of local providers increases local wealth that in turn leads to increases in the levels of spending.

3c. Additional Output

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

Table 3.4 shows the short-term related expenditure impact of visitors to the Welsh coast, who participate in walking activities, on additional output in the Welsh economy. These activities resulted in £540.9m of additional output.

Table 3.4: The Economic Impact of the Spending of Visitors to the Welsh Coast for Walking Activities (2014), Additional Output

	EU Funded Area	Non-EU Funded Area	All Wales Total
Additional Output (£millions)	493.2	47.7	540.9

3d. Gross Value Added

Some of this additional output does not add to Welsh employment or incomes – for example the cost of goods and services inputs. The measure Gross Value Added (GVA) is therefore a more appropriate metric for regional economic impact.

Table 3.5 shows that the additional output in the regional economy was associated with £271.4m of GVA (GVA is considered the most appropriate true measure of the value of economic activity, summing locally earned incomes, company profits and some taxes).

Table 3.5: The Economic Impact of the Spending of Visitors to the Welsh Coast for Walking Activities (2014), Gross Value Added

	EU Funded Area	Non-EU Funded Area	All Wales Total
Gross Value Added (£millions)	247.8	23.6	271.4

3e. Employment

The indicative estimate of the employment impact that might be associated with spending of visitors to the Welsh coast for walking in 2014 is around 12,320 person-years of employment.

Table 3.6: The Economic Impact of the Spending of Visitors to the Welsh Coast for Walking Activities (2014)

	EU Funded Area	Non-EU Funded Area	All Wales Total
Employment (FTEs)	11,270	1,050	12,320

3f. Economic Impact by Welsh Industrial Sector

Table 3.7 shows the estimated expenditure related impact of visitors to the Welsh coast for walking split by industrial sector in Wales for 2014. The impact was most concentrated in Accommodation (£88.9m of gross value added) and Restaurants/ Bars/ Cafes (£39.7m GVA).

It is particularly noteworthy that the impacts resulting from the spending of visitors to the Welsh coast are not just experienced in 'tourism facing' sectors such as accommodation. Table 3.7 highlights that visitor spending supported activity in transport/communication (£30.7m GVA), and financial and business services (£30.4m GVA).

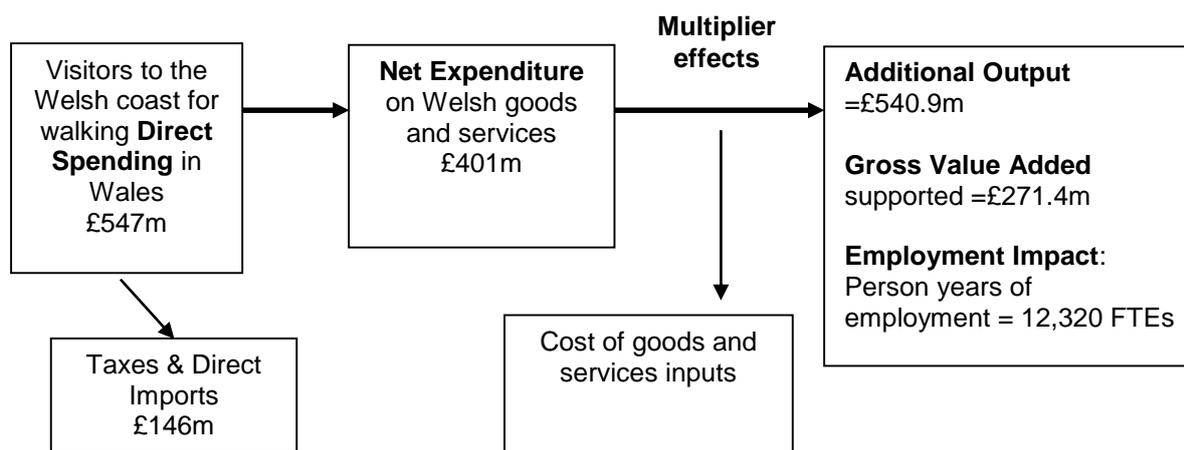
Table 3.7: The Economic Impact of visitors to the Welsh coast for walking (2014), breakdown by industrial sector

Sector	Output (£m)	GVA (£m)	FTEs
Manufacturing sectors	85.2	21.8	495
Distribution/ Retail	68.4	37.0	1,495
Accommodation	150.5	88.9	4,945
Restaurants etc.	72.7	39.7	2,390
Transport & Communication	67.8	30.7	1,175
Financial & Business Services	51.4	30.4	685
Public Sector	5.9	3.1	105
Recreation etc.	28.0	14.9	725
All other industries	11.0	4.9	305
TOTAL	540.9	271.4	12,320

3g. Summary: Economy wide effects of visitors to the Welsh coast for walking

To summarise the above, Figure 3.1 illustrates what happens to the initial direct spending total as it is modelled to estimate the indirect impact of Welsh coastal visits for walking visitor spend.

Figure 3.1 How the Direct Expenditure by visitors to the Welsh Coast for walking flows through to impacts



APPENDIX A: METHODOLOGY FOR ESTIMATING THE VOLUME OF COASTAL WALKING VISITS IN WALES IN 2014

1. Introduction

This Appendix explains how we have estimated the number of visits to the Welsh coast in 2014 which included walking as an activity.

It should be noted that the figures include all walking at the Welsh coast, not just that on the Wales Coast Path (WCP). However, it is reasonable to assume that a significant majority of coastal walks are, at least in part, on the WCP. In any case, we believe it is more helpful to estimate the total contribution of coastal walking to the Welsh economy rather than restrict it to the narrow linear corridor along which the WCP technically runs.

Unless otherwise stated, all figures refer to the number of visits, not the number of different individuals. Many people will make multiple visits. For example:

- one person walking on the coast on two different days counts as two visits
- a party of four visiting on three separate days will count as twelve visits.

It should also be stressed that we have attempted to estimate ALL visits; including those taken from home, work, holiday or other temporary accommodation.

The intention was to produce a defensible estimate so, as explained in the text below, where there is doubt, we have erred on the side of under estimation.

2. Source Data

Unfortunately there is not a single source of relevant data. Thus, the estimates have been calculated from statistics derived from three surveys:

1. Great Britain Day Visits Survey (GBDVS) 2014
2. Wales Outdoor Recreation Survey (WORS) 2014
3. The Wales Coast Path Visitor Survey (WCPVS) 2015

For further information on these surveys see the end of this appendix.

3. Estimate of Visits on Trips of Over Three Hours Duration (GB Resident Adults)

Estimate: 14.861 million visits

Source: Great Britain Day Visits Survey 2014

3.1. Relevant Extracts

We have included visits defined in GBDVS as '3 + Hour Leisure Day Visits' if they meet **all three** of the following criteria:

- Region Visited: Wales
- Type of Place Visited: 'Seaside / Coast' (includes three sub-divisions of seaside resort or town, seaside coastline - a beach and other seaside coastline).
- Activity Undertaken: Walking (includes three sub divisions of centre based walking, long walk hike or ramble (minimum of 2 miles / 1 hour) and short walk / stroll – up to 2 miles / 1 hour).

3.2. Considerations

3.2.1. It is the entire trip, including travelling time, which is over 3 hours, not just the length of time walking at the coast.

3.2.2..Some respondents listed more than one 'type of place' visited on a single trip. In such cases it is not possible to determine at which 'type of place' the walking activity occurred. Therefore, the estimate in this report is restricted to visits where Seaside / Coast is the only destination.

3.2.3. There were also 3.761 million trips where we know the coast was visited and walking was an activity but, because other 'types of place' were also visited, it is not possible to say for sure that the walking took place at the coast. Therefore, they have been excluded from the estimate.

4. Estimate of Visits on Trips of Under Three Hours Duration (Wales Resident Adults)

Estimate: 22.630 million visits

Source: Wales Outdoor Recreation Survey 2014

4.1. Relevant Extracts

Visits have only been included if they meet **all three** of the following WORS criteria:

- Main Activity: Walking
- Main Destination: Beach, Sea or Other Coastline
- Duration: Under 3 Hours

4.2. Considerations

4.2.1. It is the entire trip, including travelling time, which is under 3 hours, not just the length of time walking at the coast.

4.2.2. WORS only covers visits by Welsh resident adults, including those made to locations outside of Wales. However, the estimate of coastal visits taken by Welsh residents outside of Wales is only 3% of the total (source TNS from 2011 WORS). On the other hand, there will also be some under 3 Hour visits made by non-Welsh residents. Due to lack of data, these have not been specifically included but they will act as a counter-balance to the 3% mentioned above.

However, we have assumed that, given the very short nature of the visits (under 3 hours. including travelling time), a significant majority of visits to the Welsh coast will be by Welsh residents.

4.2.3. As with the GBDVS, it is not possible to determine where an activity took place if more than one 'type of place' is visited on one trip. However, respondents are asked to state 'main activity' and 'main destination'. Again, given the very short nature of the visits (under 3 hours, including travelling time), it has been assumed that the 'main activity' (walking) has been undertaken at the 'main destination' (beach, sea or other coastline). Whilst this, in itself, will result in a slight overestimate, it will be more than offset by excluding multiple destination visits where it is not possible to determine where the walking took place.

5. Non - GB Resident Adults

Estimate: 386,000 visits

Source: Calculation using data from GBDVS and Wales Coast Path Visitor Survey

GBDVS does not include visits by non-GB residents. However, from the WCPVS, we know that 2.53% of adult visits are not GB residents and the total adult over 3 hour figures have been adjusted accordingly. Under 3 hours figures which, as explained above, include Welsh residents only, have not been adjusted.

6. Accompanied Children (15 and under) Visits

Estimate: 5.570 million visits

Source: Calculation using data from GBDVS and WCPVS

Similarly, neither the GBDVS nor WORS visit figures include children. However, from the WCPVS we know that 12.82% of visits are made by accompanied children. This percentage can be applied to the total adult visits estimate.

None of the surveys includes unaccompanied children (15 and under) and these have thus been excluded.

7. Convergence / Non Convergence Split

Estimate: 78% / 22%

Source: Analysis of GBDVS coastal walking data at a local authority level

This report contains reference to those coastal authorities that received European Union funding for development of the WCP between 2009 and 2013 (convergence areas) and those that didn't (non-convergence areas). The percentage split has been estimated by analysing local authority level data from GBDVS using the same criteria as in section 3.1.above. However, to ensure robust base sizes, it includes all coastal visits which included walking as an activity - even if, in a minority of cases, the walking will have taken place at another 'type of place' visited on the same trip.

8. Further Information on Source Surveys

Both the GBDVS and WORS reports are categorised as Official Statistics and have been produced and published according to arrangements approved by the UK Statistics Authority.

8.1. Great Britain Day Visits Survey (GBDVS) 2014

The GBDVS, undertaken by TNS on behalf of Visit Wales, Visit England and Visit Scotland, aims to measure the volume, value and profile of Day Visits taken by GB residents to destinations in the UK.

Full Report: <http://gov.wales/docs/statistics/2015/150901-great-britain-day-visitor-2014-en.pdf>

8.2. Wales Outdoor Recreation Survey (WORS) 2014

This survey, undertaken by TNS on behalf of Natural Resources Wales, provides information on participation in outdoor recreation by adults living in Wales.

Full Report: <https://naturalresources.wales/media/4757/wales-outdoor-recreation-survey-2014-final-report.pdf>

8.3. The Wales Coast Path Visitor Survey (WCPVS) 2015

This survey, undertaken by Beaufort Research on behalf of Natural Resources Wales, gathers information, through face to face surveys, from visitors to the Wales Coast Path.

9. Acknowledgements

Thanks to Duncan Stewart and Shelly Sneddon at TNS for supplying GBDVS and WORS figures which supplement the WCPVS data contained in this report.

APPENDIX B: ECONOMIC IMPACT ASSESSMENT – TECHNICAL EXPLANATIONS AND METHODOLOGY

B1 Different types of regional economic effects

The core economic benefits of coastal walking visitor spending were examined using an economic impact model of Wales which estimates:

Direct Welsh Output, Gross Value Added and Employment Impacts. These cover the impacts supported directly through the spending of visitors to the Welsh coast, for example as visitors purchase food and drink, pay for accommodation, parking and souvenirs etc.

Indirect Welsh Output, Gross Value Added and Employment Impacts. These account for supply chain impacts in Wales. Direct expenditures support economic activity in Wales indirectly, as, in order to meet spending by visitors, outputs are required from other Welsh industries. For example, when visitors stay in local B&Bs/Guesthouses, purchases are made by the accommodation providers from local retailers and wholesalers to provide ingredients for meals for guests. This regional sourcing then in turn leads to further regional spending by these firms, for example, at local farms. The extent of these supplier effects depend on the level of Welsh sourcing for the particular sector and on levels of regional sourcing by its suppliers.

Induced Welsh Output, Gross Value Added and Employment Impacts. These capture the knock-on benefits that additional direct and indirect spending has in the economy as salaries are spent on goods and services elsewhere in the economy.

B2 Economic Model of Wales

To estimate the indirect economic impacts it is necessary to have a 'picture' of the Welsh economy that specifies how various Welsh industry sectors 'fit together' in terms of their trading relationships. This then allows the effects of spending and employment activity in one sector to be traced through the entire local economy.

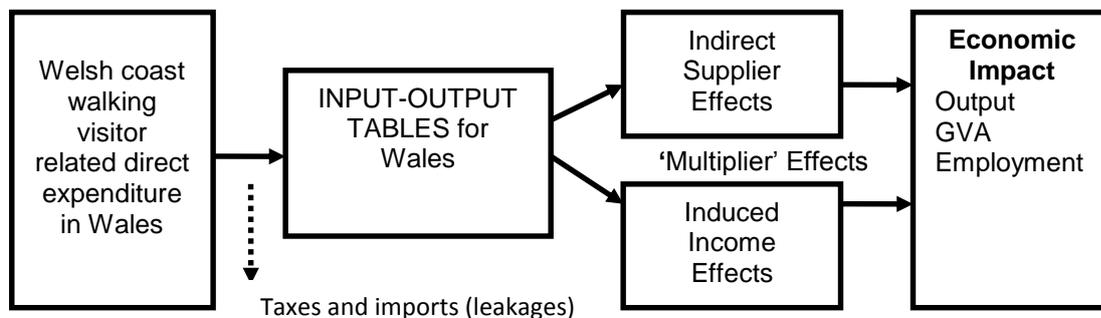
Input-Output Tables provide the most comprehensive picture of an economy. These tables detail transactions between different sectors of the local economy and beyond. As well as being an important descriptive tool, the Input-Output tables can be used for economic modelling and for impact assessment. Input-Output tables for Wales are the product of a continuing research project at WERU to develop a comprehensive picture of the Welsh economy, and the way it is changing over time. The latest tables divide the Welsh economy into 81 separate production sectors.

A Tourism Impact Planning Model, developed by WERU, is used to estimate the gross value added and employment that could be supported by visitor spending. The

Tourism Impact Planning Model is a module of the Welsh Input-Output tables that focuses on the direct and indirect economic effects associated with visitor economy spending. For more information see: <http://www.cardiff.ac.uk/research/impact-and-innovation/research-impact/understanding-the-economic-and-environmental-impacts-of-tourism-in-wales>

Figure B1 provides a simple schematic representation of the methodological approach adopted for this study.

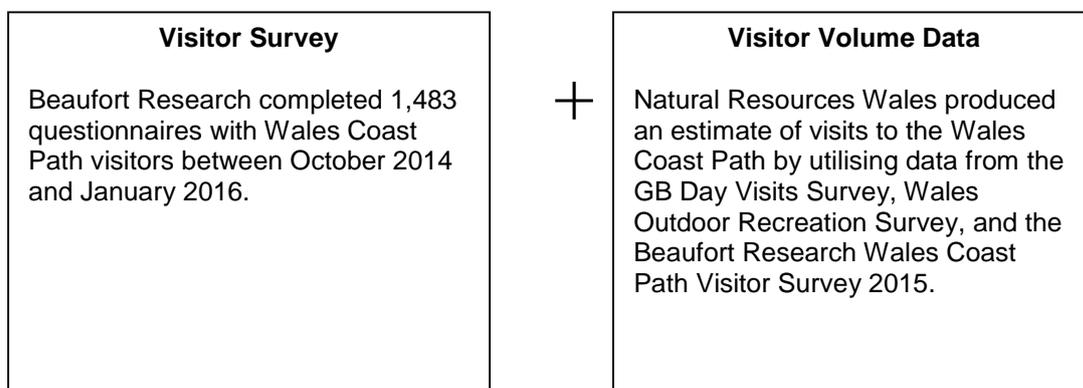
Figure B1 Summary of Approach: Estimation of Economic Impact in Wales



B3 Data Sources

Visitor volume estimates were combined with data from visitor surveys and modelling of the indirect impacts of visitor spending to provide a gauge of the overall economic impact Welsh coast walkers. The estimates of visit numbers to the Welsh coast for walking activities were supplied by Natural Resources Wales.

Figure B2 Data sources to inform 'Direct' economic effects of the spending of Welsh coast walkers



APPENDIX C: WALES COAST PATH IMPACTS OF CAPITAL SPENDING

WALES COAST PATH (EU FUNDED AREA) IMPACTS OF CAPITAL SPENDING

As well as impacts in terms of leveraging tourism spending it is important to recognise that the Wales Coast Path also involves considerable amounts of capital spending, in large measure, on construction type activity. Estimates of output and employment supported during developmental activity should be included in a more general evaluation of its impact. In particular, it is noted that selected project activity has taken place in more needy parts of the regional economy, such that employment and incomes supported in construction could have important local effects.

Moreover, evidence from prior projects evaluated by the Cardiff University team involving environmental assets indicates that the nature of construction contracts issued commonly supports local firms and jobs as opposed to situations where contracts are awarded outside of the regional and West Wales and the Valleys economy. It is stressed that what follows is an estimate of the employment and value added associated with the capital spending of the Wales Coast Path (the EU Funded Area) from 2014-15. The estimates in Table C1 are reported as a range based on different regional sourcing assumptions. There is also here no attempt to differentiate different types of construction activity i.e. the spend is assumed to be connected to an average construction type activity in Wales. We use the framework of the Welsh Input-Output tables to estimate the indirect effects associated with the spending.

Table C1 reveals that the total estimated construction spend associated with the Wales Coast Path EU Funded Area (2014-15) was an estimated £800,000 (source: NRW – WCP grant spending, including local authority match funding, for path maintenance and development).

Taking the mid-range estimate of 80% local sourcing, we estimate that once the multiplier effects of this construction spending are taken into account that some £580,000 of value added is supported in Wales and around 13 person years of employment.

However, the table also reveals that if the local sourcing of the construction industry inputs averaged just 60% then a total of around £440,000 of value would have been supported and around 10 person years of employment.

Table C1
Estimated Value Added and Employment Supported by Wales Coast Path (EU Funded Area) Capital spending (2014-15)

Local sourcing assumption	2014-15	
	Value Added (£m)	Approximate Employment (FTE person years)
Wales Coast Path	<i>EU Funded Area capital spend (£0.800m)</i>	
100%	0.720	17
80%	0.580	13
60%	0.440	10

We stress these are estimated numbers, but they do reveal that as well as leveraging tourist spending, the development activity connected to the WCP may also have important employment effects.

WALES COAST PATH (NON-EU FUNDED AREA) IMPACTS OF CAPITAL SPENDING

Estimates of the employment and value added impacts of capital spending in the Non-EU Funded Area are shown in Table C2 (calculated using the same method as above). Total estimated construction spend associated with the Wales Coast Path Non-EU Funded Area (2014-15) was an estimated £170,000. Taking the mid-range estimate of 80% local sourcing, we estimate that once the multiplier effects of this construction spending are taken into account that some £120,000 of value added is supported in Wales and around three person years of employment.

Table C2
Estimated Value Added and Employment Supported by Wales Coast Path (Non-EU Funded Area) Capital spending (end 2014-15)

Local sourcing assumption	2014-15	
	Value Added (£m)	Approximate Employment (FTE person years)
Wales Coast Path	<i>Non-EU Funded Area capital spend (£0.170m)</i>	
100%	0.150	4
80%	0.120	3
60%	0.090	2

WALES COAST PATH TOTAL IMPACTS OF CAPITAL SPENDING (EU FUNDED AREA and NON-EU FUNDED AREA COMBINED)

The results from Table C1 (EU Funded Area) and Table C2 (Non-EU Funded Area) have been combined to show an estimated total employment and value added impact of construction spend attributable to the Wales Coast Path in Table C3.

The total estimated construction spend associated with the Wales Coast Path (2014-15) was an estimated £970,000. Taking the mid-range estimate of 80% local sourcing, it is estimated that once the multiplier effects of this construction spending are taken into account that some £700,000 of value added is supported in Wales and around 16 person years of employment.

However, the table also reveals that if the local sourcing of the construction industry inputs averaged just 60% then a total of around £530,000 of value would have been supported and around twelve person years of employment.

Table C3
Total Estimated Value Added and Employment Supported by Wales Coast Path (EU Funded Area and Non-EU Funded Area combined) Capital spending (2014-15)

Local sourcing assumption	2014-15	
	Value Added (£m)	Approximate Employment (FTE person years)
Wales Coast Path	<i>Wales Coast Path capital spend (£0.970m)</i>	
100%	0.870	21
80%	0.700	16
60%	0.530	12

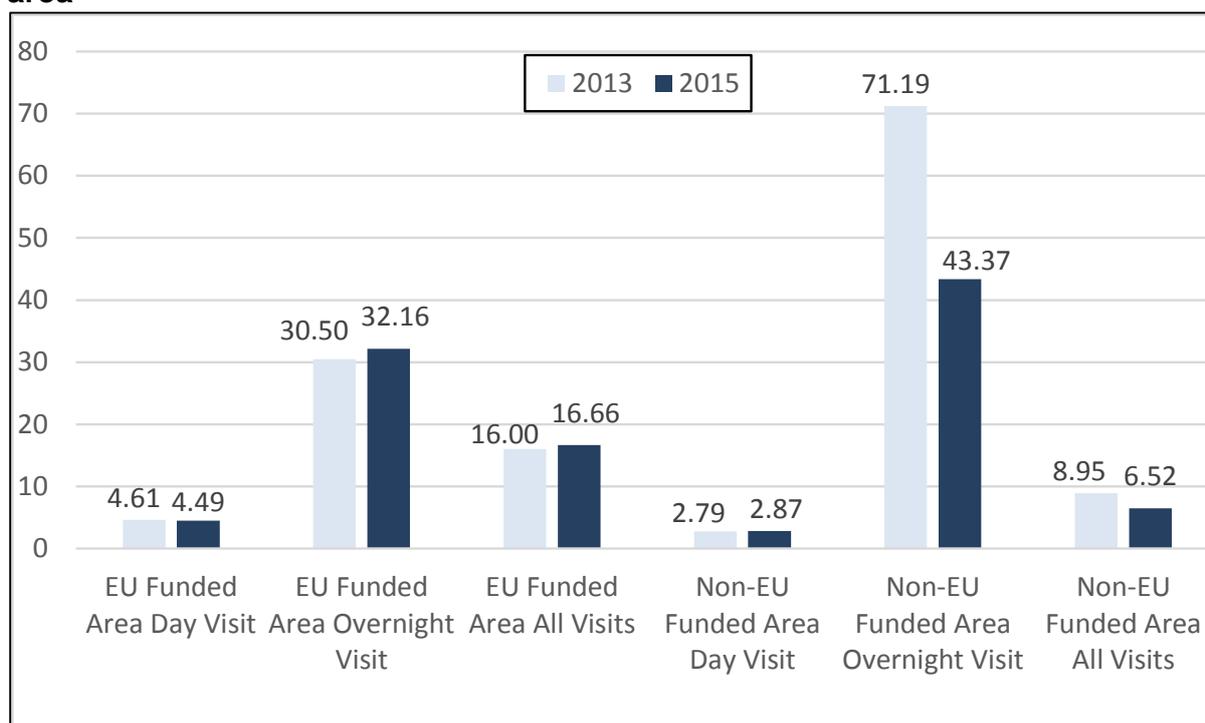
It should again be stressed that these are estimated numbers, but they do reveal that as well as leveraging tourist spending, the development activity connected to the Wales Coast Path may also have some additional employment effects.

APPENDIX D: COMPARISON BETWEEN 2013 AND 2015 SPENDING PER ADULT VISIT

Data derived from the 2013 and 2015 Wales Coast Path Surveys can be used to compare average spend per adult visit¹⁴ to the Welsh coast between the time periods, by type of visit (day or overnight) and area (EU Funded or Non-EU Funded).

The spending figures in Figure D1, given in “Current prices” (they have not been adjusted for inflation), show that average spend per adult visit to the Welsh coast for walking in the EU Funded area (day and overnight visits combined) was £16.66, up 4.1% from 2013. The corresponding Non-EU Funded spend decreased by 27.2% to £6.52 between 2013 and 2015. The more robust approach in thoroughly investigating high spending returns in 2015 may be a factor in this decrease.

Figure D1: Average spend per adult visit (£s) comparison 2013 and 2015, by area



Overnight visits in the Non-EU Funded area generate relatively high spend (£43.37 per adult per visit in 2015) compared to the EU Funded area (£32.16 in 2015). However, only around 9% of Non-EU Funded visits are overnight, compared to 44% of visits to the EU Funded area, and this is the major driver in the higher average spend per adult visit in the EU Funded area (£16.66 as compared to £6.52 in 2015; and £16.00 EU Funded, to £8.95 Non-EU Funded area in 2013).

¹⁴ As in the main report above, each day an individual made a trip to the Welsh coast was counted as a single visit. So, a party of 4 adults making one visit will count as 4. If they spend two days and nights at the Welsh coast they will count as 8 visits.

APPENDIX E: THE ECONOMIC IMPACT OF VISITOR SPEND WHILST WALKING AT THE WELSH COAST 2014

In the body of this report (Section B, Part 3) an estimate is made of the *total trip* spend of visitors to the Welsh coast who undertake walking as an activity. i.e. all spend between leaving from and returning to home or other overnight accommodation. The tables below only include spend made whilst actually walking at the Welsh coast.

Table E.1: Direct Spend by Adult Coastal Walkers on a Daytrip in Wales along sections of the Wales Coast Path (2014)

	Average Day Spend per Adult Visit (£) along WCP	Adult Day visits for coast walking (millions)	Direct Spend for Day visits (£m)
EU Funded Area	1.74	16.545	28.8
Non-EU Funded Area	1.21	7.583	9.2
Total	1.57	24.128	38.0

Table E.2: Direct Spend by Adult Coastal Walkers who stayed overnight away from home in Wales (2014)

	Average Overnight spend per Adult Visit (£s) along WCP	Volume of staying individuals (millions)	Direct Spend for Overnight Visits (£s millions)
EU Funded Area	3.31	12.999	43.0
Non-EU Funded Area	4.88	0.750	3.7
Total	3.40	13.749	46.7

Table E.3: Total trip volume and direct spending along sections of the Wales Coast Path by visitors to the Welsh coast for walking 2014

Area	Volume of Adults (millions)	Average expenditure per adult per visit (£)	Total Welsh coast walking related direct spending (£m)
EU Funded Area Day Trips	16.545	1.74	28.8
EU Funded Area Overnight	12.999	3.31	43.0
EU Funded Area Total	29.544	2.43	71.8
Non-EU Funded Area Day Trips	7.583	1.21	9.2
Non-EU Funded Area Overnight	0.750	4.88	3.7
Non-EU Funded Total	8.333	1.54	12.9
TOTAL WELSH COAST	37.877	2.23	84.7

Table E.4: The Economic Impact of the On-Path Spending of Visitors to the Welsh Coast for Walking Activities (2014), Additional Output

	EU Funded Area	Non-EU Funded Area	All Wales Total
Additional Output (£millions)	45.9	7.9	53.8

Table E.5: The Economic Impact of the Spending of Visitors to the Welsh Coast for Walking Activities (2014), Gross Value Added

	EU Funded Area	Non-EU Funded Area	All Wales Total
Gross Value Added (£millions)	21.3	3.6	24.9

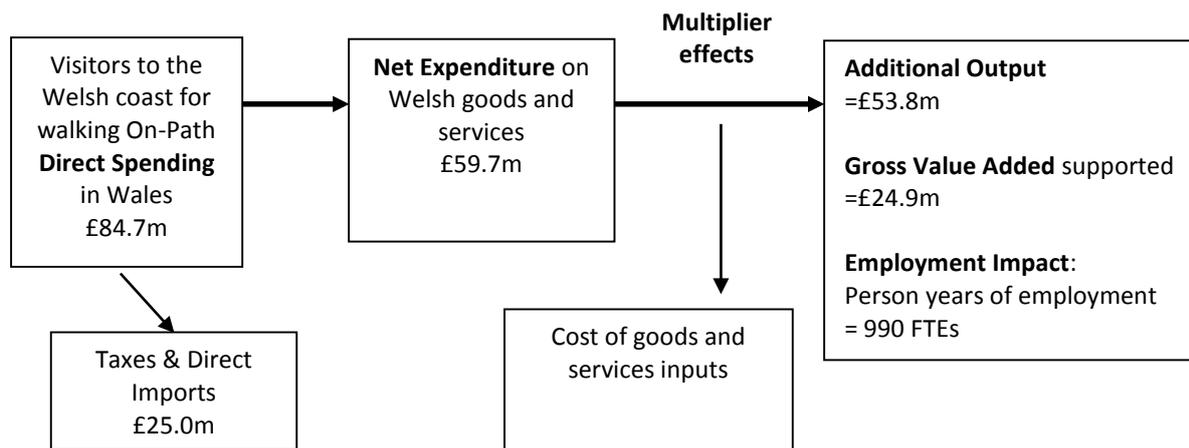
Table E.6: The Economic Impact of the Spending of Visitors to the Welsh Coast for Walking Activities (2014)

	EU Funded Area	Non-EU Funded Area	All Wales Total
Employment (FTE)	845	145	990

Table E.7: The Economic Impact of on-Path spending by visitors to the Welsh coast for walking (2014), breakdown by industrial sector

Sector			
	Output (£m)	GVA (£m)	FTEs
Manufacturing sectors	11.7	2.9	60
Distribution/ Retail	13.0	7.0	280
Accommodation	2.3	1.4	70
Restaurants etc.	7.3	4.0	240
Transport & Communication	7.0	3.0	95
Financial & Business Services	5.3	3.1	75
Public Sector	0.7	0.3	10
Recreation etc.	5.3	2.6	130
All other industries	1.2	0.6	30
TOTAL	53.8	24.9	990

Figure E.1: How the Direct Expenditure by visitors to the Welsh Coast for walking flows through to impacts





**Cyfoeth
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Natural
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Wales**



**Llwybr Arfordir Cymru
Wales Coast Path**



**Llywodraeth Cymru
Welsh Government**

beaufortresearch

**NRW WALES COAST PATH SURVEY
B01445**

For office use:	<i>Sample point ref:</i>	(1)	(2)	<i>Case number</i>	(3)	(4)	(5)	(6)
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APPROACH ADULTS AGED 16 AND OVER

Good morning/afternoon. My name is.....from Beaufort Research, a member of the Market Research Society. We are conducting a short survey on behalf of Natural Resources Wales to understand why and how people are using the Wales Coast Path, and help them, manage the path better. The survey will only take around 5 minutes or so to complete. The responses you provide will be held by Natural Resources Wales and the information will be used for research purposes only. Would you be able to help?

S1	Do you speak Welsh? IF YES Is that.....?	(7)
	Yes – fluently	1
	Yes – not fluently	2
	No	3

IF SPEAK WELSH, ASK S2 BEFORE CONTINUING WITH INTERVIEW

S2	We can conduct this interview in English or in Welsh - which would you prefer?	(8)
	English	1
	Welsh	2 → CHANGE TO WELSH VERSION

Q1	RECORD RESPONDENT'S MODE OF TRANSPORT ON COAST PATH MAY MULTICODE	(9-12m)
	Walking	1
	Cycling	2
	Horse riding	3
	Using a motorised vehicle (e.g. motorbike, quad bike)	4
	Using an assisted/ disability vehicle	5
	Other	6

Q2	SHOWCARD A And which of the following best describes why you are using the path today? SINGLE CODE. IF "DOGWALKING" RECORD AS LEISURE TRIP FROM HOME OR AS PART OF HOLIDAY/ BREAK AS APPROPRIATE	(13)
	To go to or from your usual place of work or another destination	1
	Non-routine work trip purposes	2
	Part of a leisure trip from home	3
	Part of a leisure trip as part of a longer break or holiday in Wales	4
	Other (specify) _____	5

<p>Q3</p>	<p>SHOWCARD B Based on what you know about the coast paths in Wales which one of the following do you think best describes the coast paths in Wales? SINGLE CODE</p> <p style="text-align: right;">They are joined up into one path 1 They are not joined up into one path but will be in the near future 2 They are not joined up into one path but will be in the long term 3 They are not joined up into one path and probably never will be 4 Don't know 5</p>	<p>(20)</p>			
<p>Q4</p>	<p>READ OUT In 2012 the Wales Coast Path was created, with 850 miles of pathways around the country's coastline. It includes already existing coast paths along with sections which have been improved and new sections of path.</p> <p>Can you tell me whether you think that the path you are on now is... READ OUT, SINGLE CODE</p> <p style="text-align: right;">An unchanged existing section 1 An improved section 2 A new section of path 3 Don't know 4</p>	<p>(21)</p>			
<p>Q5</p>	<p>SHOWCARD C Thinking about this visit, if you had not had access to this section of coastal path, what would you have done? SINGLE CODE</p> <p style="text-align: right;">Walked/ cycled/ horse ride by another route somewhere else 1 Undertaken the journey by car/ van/ bus/ train etc. 2 Not made the journey or gone walking/ cycling/ horse riding at all 3 Other 4 Don't know 5</p>	<p>(22)</p>			
<p>Q6a</p>	<p>ASK ALL How many adults are <u>in your immediate party</u> for walking/ cycling/ riding along the path today? INCLUDE ALL THOSE AGED 16+. IMMEDIATE PARTY = THOSE WITHIN THE SAME GROUP THAT SHARE FINANCIAL RESPONSIBILITY.</p> <p style="text-align: center;">Record no. adults <table border="1" style="display: inline-table; vertical-align: middle;"><tr><td style="width: 30px; height: 20px;"></td><td style="width: 30px; height: 20px;"></td><td style="width: 30px; height: 20px;"></td></tr></table></p> <p style="text-align: center;">(23) (24) (25)</p>				
<p>Q6b</p>	<p>And how many children are <u>in your immediate party</u> for walking/ cycling/ riding along the path today? INCLUDE ALL THOSE AGED <16.</p> <p style="text-align: center;">Record no. children <table border="1" style="display: inline-table; vertical-align: middle;"><tr><td style="width: 30px; height: 20px;"></td><td style="width: 30px; height: 20px;"></td><td style="width: 30px; height: 20px;"></td></tr></table></p> <p style="text-align: center;">(26) (27) (28)</p>				

Q7	<p>READ OUT. HAND PEN TO RESPONDENT.</p> <p>On the following map please can you draw in your entire trip along the coast path <u>today</u>. Mark the start of your trip with an S and the finish with a F. If you will be doubling back along the same route please make sure you indicate the furthest point you will be reaching on the path before you turn back.</p> <p>IF UNABLE TO USE MAP SEE BELOW</p> <p>RECORD TRIP ON PATH VERBATIM, BELOW, GIVING AS MUCH DETAIL AS POSSIBLE (PLACE NAMES, POINTS OF INTEREST). GIVE START POINT AND END POINT AND – IF RETURNING TO THE START POINT – FURTHEST POINT ALONG THE PATH REACHED BEFORE TURNING BACK. IF START AND/OR END IS NOT ON MAP PROVIDED, PLEASE WRITE IN START/END POINTS BELOW</p> <hr/> <hr/> <hr/> <hr/> <hr/>	
Q8	<p>And will you be doubling back along this section of the Wales Coast Path?</p> <p>SINGLE CODE</p>	<p>(30)</p> <p style="text-align: right;">Yes 1 No 2 Don't know 3</p>

<i>For office use:</i>	<i>Mileage</i>	(31)	(32)	(33)	(34)
				●	

ASK ALL

Q9 Approximately how many miles along the coast path do you think you will cover on your trip today between the start point on the path and the furthest point from that start point on the path?
NOTE THIS IS NOT THE TOTAL MILES WALKED TODAY – IT IS THE TOTAL MILES ALONG THE STRETCH OF THE COAST PATH
IF ESTIMATE GIVE MID POINT. IF DON'T KNOW RECORD YYYY

Estimated number of miles (e.g. *two and a half miles = 2.5*)

		●	
(35)	(36)	(37)	(38)

Q10 Approximately how much do you and your immediate party expect to spend during the following today:
[USE LEADING ZEROS. IF A RANGE, RECORD THE MID POINT. IF NOTHING WRITE IN 0000. IF 'DON'T KNOW' WRITE IN YYYY. 'REFUSED' WRITE IN ZZZZ]

a. while travelling along this section of coast path

£	£	£	£
(39)	(40)	(41)	(42)

= spent today/ intend to spend

b. on the entire trip today (including spend along the route as well as fuel costs to and from the coast path, parking, food and drink and souvenirs but excluding accommodation)

£	£	£	£
(43)	(44)	(45)	(46)

= spent today/ intend to spend

Q11 Does your visit to this coastal path involve you staying overnight in Wales away from home?

	(50)
Yes	1 → Q12
No	2 → Q14
Don't know	3 → Q14

Q12 **ASK IF YES AT Q11**
 How many nights **in Wales** will you be staying in order to use the coast path?
IF 'DON'T KNOW' CODE AAA

Record nights

(51)	(52)	(53)

Q13a **ASK IF YES AT Q11**
SHOWCARD D – MAY MULTICODE
 In what type of accommodation will you be staying in Wales?

	(54-55m)
Hotel	1 → Q13b
Guesthouse/ B&B/ Farmhouse	2 → Q13b
Self-catering cottage/ house/ apartment	3 → Q13b
Campsite/ caravan site (static or touring)	4 → Q13b
Hostel or bunkhouse	5 → Q13b
With friends or family	6 → Q14
Other	7 → Q14

Q13b **ASK IF STAYING IN PAID ACCOMMODATION AT Q13a**
 Approximately how much will you and your immediate party spend on accommodation today?
IF 'DON'T KNOW' CODE AAA

Cost for single night per immediate party

£	£	£
(56)	(57)	(58)

Q14	<p>ASK ALL SHOWCARD E</p> <p>Which of the following best describes how often you use the coast path in Wales?</p> <p style="text-align: right;">Daily 1 Weekly 2 At least once a month 3 At least once a year 4 Hardly ever 5 This is the first time 6</p>	(59)
Q15	<p>Thinking about you and anyone in your immediate party (IF APPLICABLE) on the coast path today, is there anyone whose day to day activities are limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?</p> <p>INCLUDE PROBLEMS RELATED TO OLD AGE</p> <p style="text-align: right;">Yes – limited a lot 1 Yes – limited a little 2 No 3</p>	(60)
Q16	<p>SHOWCARD F – SINGLE CODE</p> <p>Finally, which one of these statements best describes your usual approach to risk and safety while using the Wales Coast Path?</p> <p style="text-align: right;">I don't take any precautions as I don't see any risk in walking the Wales Coast Path 1 I don't take any precautions as I'm happy to live with a small amount of risk 2 I take some precautions and I'm happy to live with a small amount of risk 3 I take all necessary precautions and feel safe while walking 4 Don't know 5</p>	(61)

CLASSIFICATION

Now just a few details to check that our sample is representative

<p>GENDER (62)</p> <p style="text-align: right;">Male 1 Female 2</p>	<p>OCCUPATION OF CHIEF INCOME EARNER* (Last job if retired)</p> <p>Actual job: _____ Position/ grade: _____</p>
<p>AGE (63-64)</p> <p>Write in age _____</p>	<p>SOCIAL CLASS (67)</p> <p style="text-align: right;">AB 1 C1 2 C2 3 DE 4</p>
<p>STATUS IN HOUSEHOLD (65)</p> <p style="text-align: right;">* Chief Income Earner 1 Other adult (aged 16+ or over) 2</p>	
<p>WORKING STATUS OF RESPONDENT (66)</p> <p style="text-align: right;">Working full time (30+ hours per week) 1 Working part time (up to 29 hours per week) 2 Full time education 3 Retired 4 Not working 5 Other 6</p>	

* The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source. Either male or female.

WHAT IS YOUR ETHNIC GROUP? SHOWCARD G

White (68)	Mixed	Asian or Asian British	Black or Black British	Chinese or other
White British 1	White & Black Caribbean 4	Indian 8	Caribbean C	Chinese F
White Welsh 2	White & Black African 5	Pakistani 9	African D	Other G
Other white 3	White & Asian 6	Bangladeshi A	Other Black E	
	Other mixed 7	Other Asian B		

Month: (69)	Day of week: (70)	Time of day: (71)	Weather (Mainly): (72)
January 1	Monday 1	Before midday 1	Sunny 1
February 2	Tuesday 2	After midday 2	Cloudy 2
March 3	Wednesday 3		Showers 3
April 4	Thursday 4		Rain 4
May 5	Friday 5		Windy 5
June 6	Saturday 6		
July 7	Sunday 7		
August 8			
September 9			
October A			
November B			
December C			

READ OUT

Beaufort Research conducts back-checks on a sample of interviews to make sure that they were carried out according to our procedures. For this reason we would like to collect your address and telephone number but you do not have to provide this. These details will not be passed on to Natural Resources Wales or any third party and will only be used to verify a small percentage of the interviews we conduct. Would you be happy to give your contact details?

Respondent name: _____

Address: _____ County (Country if outside UK): _____

Postcode

(73)	(74)	(75)	(76)	(77)	(78)	(79)

Telephone number: _____

THANK RESPONDENT: CLOSE INTERVIEW: PROVIDE THANK-YOU LEAFLET

INTERVIEWER DECLARATION: I declare that I have conducted this interview in accordance with your instructions.

Signature: _____

	D	D	M	M	Y	Y	INTERVIEWER NO.				Accompanied:		Supervisor signature:	
Date of interview:												Yes	1	
	(80)	(81)	(82)	(83)	(84)	(85)	(86)	(87)	(88)	(89)	No	2		

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