The economic and health impacts of walking on English coastal paths: A baseline for future evaluation

Volume 1 – Baseline Assessment

NATURAL ENGLAND

Foreword

Natural England commission a range of reports from external contractors to provide evidence and advice to assist us in delivering our duties. The views in this report are those of the authors and do not necessarily represent those of Natural England.

Background

The creation of the England Coast Path (ECP) offers the unique opportunity to establish baseline data and to create a methodology that will enable the future evaluation of the economic, health and social impacts of improvements in coastal access that the ECP will bring.

A steering group of experts from Natural England and Defra was assembled to oversee the work. During 2016/17 a contract was let to develop a methodology.

In 2017/18 a further contract was let to refine and use that methodology to establish baseline data.

The intention is to repeat the methodology after the completion of the ECP in order to quantify the economic, health and social impact of the ECP.

This report should be cited as:

ICF, Sustrans, Cavill Associates and Blue Island Consulting (2019). The economic and health impacts of walking on English coastal paths: A baseline study for future evaluation. Baseline Assessment Volume 1. A report produced for Natural England.

The economic and health impacts of walking on English coastal paths: A baseline study for future evaluation

Volume 1 - Baseline Assessment

07 March 2019

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The economic and health impacts of walking on English coastal paths: A baseline study for future evaluation

Volume 1 - Baseline Assessment

A report submitted by ICF Consulting Services Limited
in association with

Sustrans, Cavill Associates, Blue Island Consulting

Date: 07 March 2019

Job Number 30301392

Document Control

Document Title	The economic and health impacts of walking on English coastal paths: A baseline study for future evaluation. Baseline Assessment Volume 1
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Checked by	Matt Rayment (ICF)
Date	07 March 2019

Suggested citation

ICF, Sustrans, Cavill Associates and Blue Island Consulting (2019). The economic and health impacts of walking on English coastal paths: A baseline study for future evaluation. Baseline Assessment Volume 1. A report produced for Natural England.

Contents

Executive summary

The England Coast Path and the England Coast Path Programme

The "England Coast Path" (ECP) will be a new 2,700 mile National Trail around all England's coast. The Marine and Coastal Access Act 2009 formally established the "coastal access duty", which creates the legal obligation and process to create the ECP.

The England Coast Path Programme ("the Programme") is delivering access improvements in order to provide the rights of access necessary to complete the ECP. It will join up existing coastal National Trails (e.g. the Cleveland Way, North Norfolk Coast Path and South West Coast Path), and address the intermittent nature of the coastal path in other areas. The Programme is led by Natural England, delivered through eight regional hubs working with local partners.

Impact evaluation of completing the England Coast Path

By improving access to the coast and completing the ECP, the Programme is expected to bring significant benefits to local economies and communities, recreational users, and to public health. Natural England wishes to evaluate the Programme and to quantify and value its impacts, as far as possible. This will provide evidence of the impact of this major environmental access investment and provide important lessons for future policy decisions.

This report provides the baseline assessment of the current benefits of English coastal paths. Once the Programme has been concluded (expected in 2020) and the ECP created, further assessments will be conducted using the same methodology and compared to this baseline to evaluate the impact of the Programme.

The evaluation will draw on four key evidence inputs in order to undertake an assessment across four distinct impact categories. Figure ES1.1 summarises the evaluation approach.

Figure ES1.1   Evaluation approach
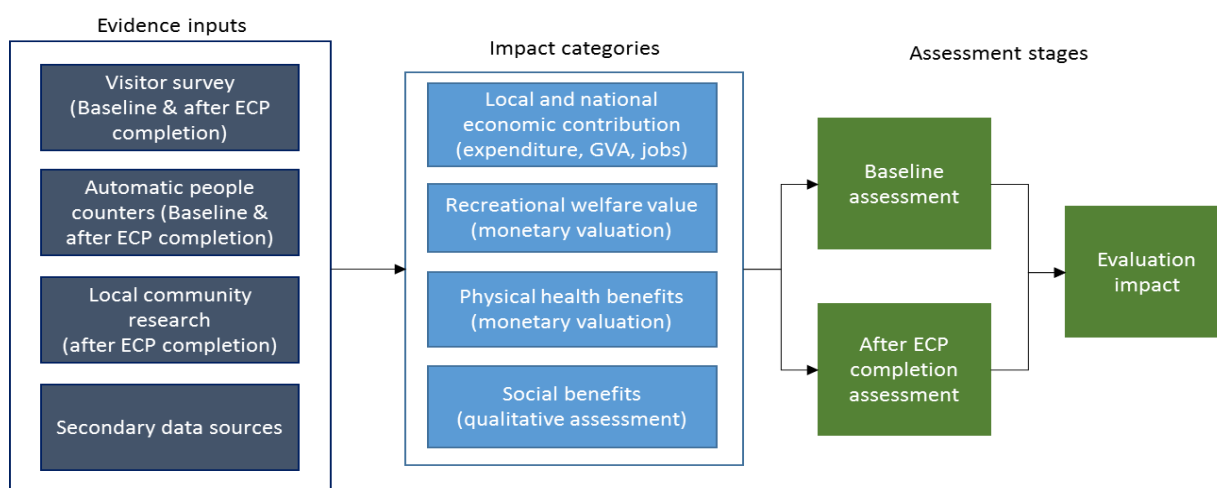
Summary of baseline results for 2017

Over 29 million leisure walking trips took place on English coastal paths in 2017. The south east and south west regions received the highest level of use, between them accounting for over half of all visits.

Almost half of the visitors to coastal paths are local day visitors, living within 10 miles of the path. The smallest user group were non-local day visitors (13%), with the remaining 38% overnight visitors.

Visitors identified a number of personal benefits as a result of using coastal paths. The proportion of those strongly agreeing with positive statements on personal benefits were notably higher than has been reported (via other surveys[1]) for visitors to English National Trails or for English coastal visits in general.
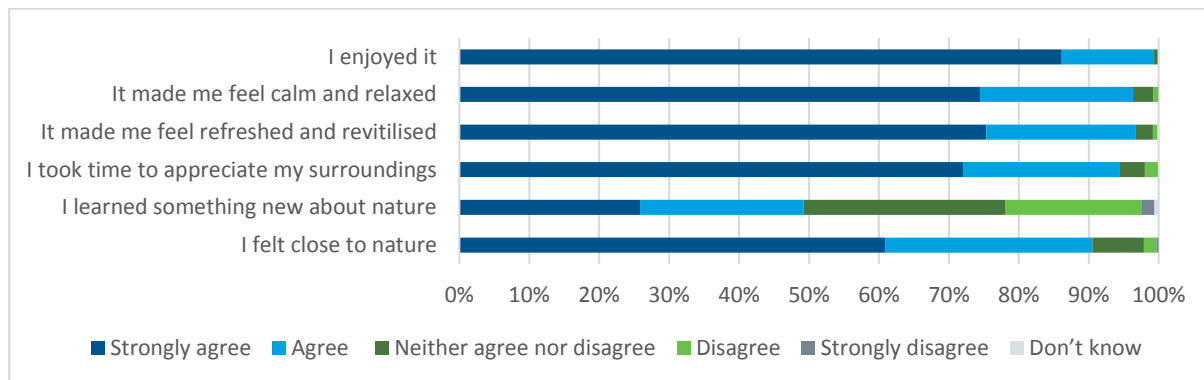
Over £379 million is spent in the national economy as a result of trips to use English coastal paths, of which £350 million is spent within local coastal economies (defined as the economic area within 10 miles of English coastal paths). When local coastal resident expenditure is excluded, the additional visitor expenditure from coastal paths in local coastal economies is estimated to be £334 million. This is estimated to directly support £167 million of Gross Value Added (GVA) and 5,900 full time equivalent (FTE) jobs in local coastal economies.

The average visitor spends £18.85 per day during a trip to English coastal paths. Average expenditures differ significantly between different types of visitor.
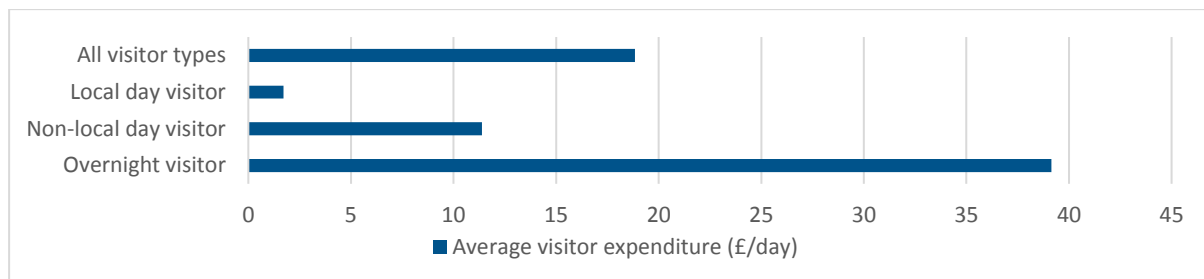
People also benefit personally from their visits to coastal paths. The average benefit to a person's recreational wellbeing[2] is valued at an estimated £62 per trip. For the 29 million leisure walking trips taken in 2017, therefore, **the total benefit to the recreational wellbeing of people using English coastal paths was valued at an estimated £1.8 billion.**

Walking on English coastal paths led to an estimated 11 fewer deaths amongst path users in 2017 (compared to non-users)**, a benefit valued at £19 million**. Exercise from walking on the path leads to a reduction in the risk of premature mortality. The estimate accounts for the likelihood that walkers may have undertaken other physical activity were there no coastal path. Hence the estimate reflects the genuine increase in physical activity and health benefits supported by coastal paths.

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[1] TSE Research (2015). National Trails 2014 Visitor Survey. Final report of results; and, Natural England (2017). Monitor of Engagement with the Natural Environment survey.

[2] 'Benefit to wellbeing' is used here to refer to the benefit people gain from a visit. The value of this benefit is estimated using the travel cost method because visits do not have a market price. The travel cost method uses an individual's time and travel costs to estimate the value they derive from that visit.

1   Introduction

ICF, in partnership with Sustrans, Cavill Associates and Blue Island Consulting, were commissioned by Natural England to develop a baseline assessment of the England Coast Path (ECP) as an input to a future evaluation of the England Coast Path Programme ("the Programme"). This baseline assessment builds on the evaluation framework previously designed by ICF and the same partners in 2016.

This is the baseline assessment report. The ECP is not yet completed, so this assessment presents a description of the users and benefits of English coastal paths in 2017. The report provides baseline assessments of total visits and visitor characteristics and of the current contribution of English coastal paths to the economy, to recreational economic wellbeing and to human health.

The rest of this section provides a brief introduction to the planned evaluation and the methods used for the baseline assessment. Sections 2 and 3 then set out the baseline results. This represents 'Volume 1'. A Volume 2 report sets out in more detail the evaluation design and methods that were used to undertake the baseline assessment (and can be used to undertake the future evaluation) as well as the results.

1.1   Context

1.1.1   The ECP and the Programme

The Marine and Coastal Access Act 2009 (henceforth 'the Act') formally established the "coastal access duty". This created the legal obligation and process to develop the ECP, which will join up existing coastal National Trails (e.g. the Cleveland Way, North Norfolk Coast Path and South West Coast Path) and address the intermittent nature of the coastal path in other areas. It will be a new 2,700 mile National Trail around all England's coast, expected to be completed by 2020.

The Programme is providing access improvements in order to provide the rights of access necessary to complete the ECP. It is led by Natural England, delivered through eight regional hubs working with local partners.

1.1.2   Evaluating the impacts of completing the England Coast Path

By improving access to the coast by completing the ECP, the Programme is expected to bring significant benefits to local economies and communities, recreational users, and public health. Natural England wishes to evaluate the Programme and to quantify and value its impacts, as far as possible.

The evaluation involves three principal phases:

- Phase 1 – completed in autumn 2016 through an ICF contract for Natural England. It established a framework for the evaluation, setting out a proposed methodology for assessing its impacts, and providing draft research tools.

- Phase 2 – completed in spring 2018 through an ICF contract for Natural England. It updated and applied the framework developed in Phase 1 to provide a baseline analysis of the current use of English coastal paths in 2017 and their impacts, against which future changes will be assessed (this report presents the outputs from this work).

■ Phase 3 – due to commence after 2020 will conduct an impact evaluation of the Programme and completed ECP in terms of effect on usage and the resultant economic, social and health effects.

1.1.3 Purpose of the baseline report

This report presents a baseline assessment of the use and benefits of English coastal paths. The baseline assessment provides the information against which changes can be measured after the Programme has concluded.

It presents the baseline situation with regard to visit volumes and visitor characteristics, and the benefits currently generated for the economy, to individual recreational wellbeing and to physical human health.

This report is accompanied by Volume 2, a design and methods report. It provides full details of the Programme's impact evaluation framework and approach and the methods used to construct the baseline (and that can be used for a future evaluation).

1.2 Evaluation and baseline assessment method statement

This subsection outlines the evaluation approach and the data inputs and methods used for the baseline and to be used in the future to complete the evaluation.

1.2.1 Approach

The evaluation draws on four key evidence inputs in order to assess the contribution of coastal paths to following impact categories: the national and local economy, recreational wellbeing, physical health and social benefits. Assessments are undertaken at two points in time: a baseline assessment in 2017, and a post-Programme assessment once the ECP is complete (post-2020). When the evaluation is carried out (post-2020), the baseline will be re-analysed to establish an estimate of the counterfactual[3], which will be compared to the actual post-2020 situation to determine the impacts of the Programme. Figure 1.1 summarises this approach.

Figure 1.1   Evaluation approach

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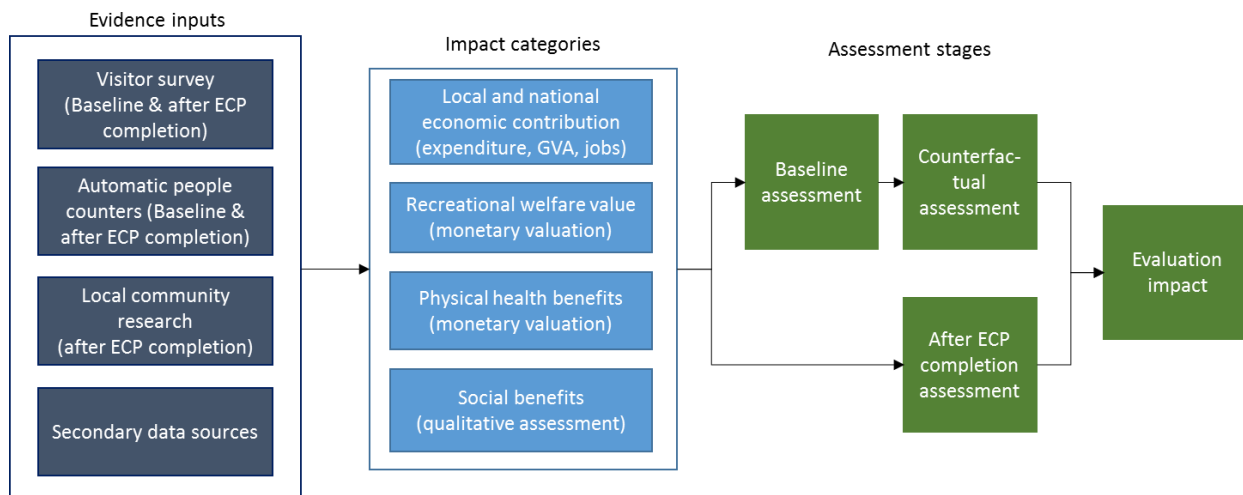
[3] The counterfactual represents the expected contribution of coastal paths to each impact category (as shown in Figure 1.1) post-2020 had the Programme not been implemented. See The Magenta Book for further explanation of what a counterfactual is.

1.2.2   Evidence inputs

1.2.2.1   Visitor survey

A baseline visitor survey was carried out between July 2017 and January 2018. The survey was conducted at 32 locations on coastal paths around England, providing 2,922 completed questionnaires. At the same time as the survey, a manual count of path users at these 32 locations was undertaken. The survey and manual counts will be repeated after the completion of the Programme.

1.2.2.2   Automatic people counters

Natural England manages 16 automatic people counters on English coastal paths. These provided daily counts of path users on a continuous basis for the calendar year 2017. The 16 locations are different to the 32 locations in which the visitor survey took place.

1.2.2.3   Local community research

Local community level qualitative research will be undertaken after the completion of the Programme in order to explore the social impacts of the Programme. This research was not undertaken at the baseline stage.

1.2.2.4   Secondary data sources

Secondary data have been used as inputs to the assessment and to provide benchmarks against which the results can be both tested and compared.

1.2.3   Assessment methods

1.2.3.1   Visitor volume model

The Visitor Volume Model (VVM) consists of two components: a bottom up component and a top down component, which each produce different estimates of visitor volume.

The bottom up component uses data from the automatic people counters, visitor survey and manual counts. In order to scale up these point counts to provide overall estimates of usage of English coastal paths, each <1km stretch of coastal path was assigned to one of 22 different coastal categories with common characteristics. The data was analysed to produce an annual usage estimate for each of the 22 categories. Each category usage estimate was then scaled up to provide an estimate of the number of walking trips on paths across the entire English coast.

The sampling strategy was designed to provide an estimate of walking trips across coastal paths at a national level. Regional estimates were developed by breaking down the total visit estimates for each coastal category in proportion to the length of each category within each region[4]. This means that the regional breakdown is indicative and is not based solely on data collected within that region.

The top down component of the VVM uses data from national surveys to provide an alternative estimate. Two top down alternative estimates are produced using different combinations of national datasets:

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[4] For example, the North East accounts for 14% of the total length of category 1 stretches of coast around England. Therefore 14% of the total number of visits to category 1 coastal paths was allocated to the North East.

- Estimate Alt. 1: which combines data from the Monitor of Engagement with the Natural Environment (MENE)[5] and the International Passenger Survey (IPS)[6].
- Estimate Alt. 2: which combines data from the Great Britain Day Visits Survey (GBDVS)[7], Great Britain Tourism Survey (GBTS)[8], and International Passenger Survey (IPS).

1.2.3.2   Contribution to the economy

The contribution to the economy was estimated using estimates of visitor expenditure, based on responses to the visitor survey, and scaling these up by the estimated numbers of visitors. Total expenditure estimates were adjusted to account for the extent to which the visitor survey indicates that coastal paths were a motivator for the visit, and hence the extent to which visit expenditure can be attributed to the paths.

The economic impact of these expenditures was estimated in terms of its effects on economic output (Gross Value Added – GVA) and employment (full time equivalent – FTE – jobs). These estimates were calculated using data from the Annual Business Survey (ABS)[9] on the amount of GVA supported by each £1 of business turnover, and the turnover required to support one FTE job.

The impacts were estimated for the national (England) economy as a whole, as well as for only a subset – local coastal economies within England (the area within 10 miles of English coastal paths). At the local level, the estimates were based on expenditures by non-local visitors only; the effects of money spent by local people were excluded, as this is judged not to have an additional effect on the local economy. A local multiplier of 1.25[10] was applied to take account of the multiplier effect, which arises as money is re-spent locally by businesses (indirect effects) and employees (induced effects).

1.2.3.3   Baseline contribution to recreational wellbeing

The travel cost method (TCM) was used to estimate the wellbeing benefits that recreational visitors derive from their use of coastal paths. The TCM applied economic analysis to observations on the time and travel costs incurred when individuals travel to coastal paths (taken from the visitor survey), in order to estimate the overall value that people derive from their visits. The economic model also took account of other factors which may influence wellbeing values, including the socio-economic characteristics of the individual, the characteristics of the paths, and the characteristics of other potential recreation sites.

1.2.3.4   Contribution to physical human health

Benefits to the physical health of coastal path users were estimated using the World Health Organization's (WHO) Health Economic Assessment Tool (HEAT) for walking

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[5] Natural England (2017). Monitor of Engagement with the Natural Environment. The national survey on people and the natural environment. Visits to coastal England

[6] https://www.ons.gov.uk/surveys/informationforhouseholdsandindividuals/householdandindividualsurveys/internationalpassengersurveyips

[7] Kantar TNS (2017). The Great Britain Day Visitor 2016 annual report

[8] Kantar TNS (2017). The GB Tourist 2016 Annual Report

[9] https://www.ons.gov.uk/surveys/informationforbusinesses/businesssurveys/annualbusinesssurvey

[10] Homes and Communities Agency (2013), Additionality Guide: Fourth Edition 2014

and cycling[11]. The HEAT tool estimates the effect of physical activity in reducing mortality, which can then be valued in monetary terms. It provides a conservative estimate as it does not estimate the benefits from reduced illness, such as diabetes or obesity-related conditions. The tool uses data on the total number of visitors (from the VVM) and average trip duration and frequency (from the visitor survey). The benefits of reduced mortality were estimated using Department for Transport estimates of the monetary value of a prevented fatality. Each life saved is currently valued at £1.735 million[12]. The assessment provided an estimate of the number of deaths avoided and the economic value associated with this outcome. The headline estimate was calculated based on the increase in physical activity 'caused' by the coastal paths. This draws on survey responses that state that without the path, people would not have been physically active elsewhere. It is therefore less than the total level of physical activity associated with walks on the coastal paths.

1.2.3.5 Contribution to social benefits

The social benefits of English coastal paths will be assessed qualitatively, using case studies and local community research to examine the effects of the Programme after its completion. They are not therefore included in the baseline assessment. However, the visitor survey has collected baseline information about the social characteristics of coastal path users.

1.2.3.6 Limitations

There are a number of limitations with the methodologies employed. These are discussed in detail in the design and methods Volume 2 report. Limitations include:

- Parts of the ECP had already been delivered by the time the baseline was developed.

- The sampling strategy was designed to support a national assessment. Any regional estimates presented are indicative only.

- The sampling strategy allocated each <1km stretch of the coastal paths to one of 22 categories. It assumes all stretches of the coastal paths in any given category have the same visitor numbers and characteristics.

- The visitor survey provides key inputs to the assessment. The method therefore relies on the ability of respondents to accurately recall and estimate certain information.

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[11] www.heatwalkingcycling.org

[12] Inflated to 2017 prices using HMT Deflator. Original figure in 2010 prices sourced from: Department for Transport https://www.gov.uk/government/publications/webtag-tag-data-book-december-2017

2 Baseline Analysis of Visitors

2.1 Volume analysis – number of visits

2.1.1 Estimated number of walking trips on English coastal paths in 2017

It is estimated that **29.1 million leisure walking trips** took place on English coastal paths in 2017. This is based on the 'bottom up' component of the Visitor Volume Model (VVM).

2.1.1.1 Comparison of estimates from the bottom up and top down components of the VVM

The bottom up component of the VVM, which uses primary data collected for the purposes of this assessment, is considered to provide the most robust estimate of the number of walking trips on coastal paths. The nature of assumptions required to generate the top down estimate resulted in particular large ranges and low levels of confidence. Figure 2.1 shows a comparison of the estimate generated through the bottom up component with the two alternative top down estimates (that draw on a range of national datasets).

Figure 2.1 Comparison of preferred VVM estimate (bottom up) with alternative (top down) estimates
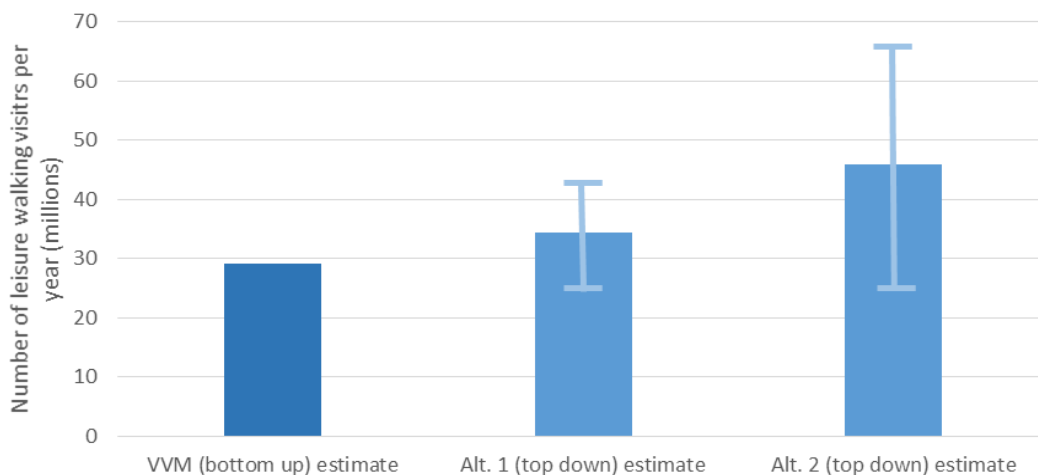
Note: Alt 1 and Alt.2 present ranges and mid-points of top-down estimates using national datasets. The upper and lower points of which are shown by the error bar, and mid-point by the bar, in Figure 2.1.The ranges are based on different assumptions of the proportion of coastal walking likely to be on coastal paths[13],

The top down alternative estimates, based on existing national datasets, provide some insight into the volume of walking trips to the coast. However, none of the datasets used to derive these give specific data on use of coastal walking paths. A number of broad assumptions need to be applied to the national datasets to make an estimate of coastal path usage (see Volume 2 Design and Methods for full details of assumptions). By contrast, the bottom up estimate is based on data collected on English coastal paths and designed specifically for the purpose of the assessment.

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[13] See Volume 2 for the detailed methodology

This includes continuous data collected from automatic people counters over a full year (2017), additional manual counts and survey data collected at 32 locations over 126 days over a seven month period (July 2017-January 2018).

That the estimate produced through the bottom up component sits within the range of top down estimates provides reassurance that the sampling strategy has enabled a reliable estimate to be made.

2.1.2 Regional breakdown

Table 2.1 provides regional estimates of walking trips on English coastal paths. It indicates that the south east and south west regions receive the highest level of use, accounting for over half of total visits between them.

The sampling strategy was primarily designed to provide an estimate of the number of walking trips at the England level. The estimates of coastal paths in English regions are less robust than the national estimate and should be treated as indicative only.

Table 2.1   Breakdown of estimated usage of coastal paths in each region in 2017

English region	Proportion of visits in 2017
East of England	4%
East Midlands	17%
North East	6%
North West	13%
South East	24%
South West	30%
Yorkshire & Humber	6%
All England	100%

2.2 Visit and visitor characteristics

This section describes the characteristics of visitors and their visits. Where comparisons are made between visitor types[14], the differences described in the text are statistically significant at the 95% confidence limit[15]. Where feasible the analysis also compares the findings with those for 'all coastal visits'[16] (i.e. not just coastal visits involving walking on coastal paths), and with visits to England's National Trails[17], the

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[14] Visitor types include: local visitor (living within 10 miles of an English coastal path); non-local day visitor, and overnight visitor.

[15] The Kruskal Wallis H test is a nonparametric test which was used to indicate whether there are statistically significant differences between two or more groups. Where the test indicated a significant difference existed between the different types of visitors, a post-hoc analysis of pairwise comparisons was conducted to determine which one of these three groups of visitors were significantly different from each other.

[16] Natural England (2017). Monitor of Engagement with the Natural Environment. The national survey on people and the natural environment. Visits to coastal England.

[17] TSE Research (2015). National Trails 2014 Visitor Survey. Final report of results

Wales Coast Path[18] and the South West Coast Path[19]. The differences between the English coastal paths survey results and the results of other studies were not statistically tested.

2.2.1.1 Type of visitors

Half of visits (51%) to coastal paths are by local day visitors (living within 10 miles of the path). The smallest proportion of visits are from non-local day visitors (15%).

Compared to English National Trails, English coastal paths have a higher proportion of local day visits and overnight visits, and a lower proportion of non-local day visits. Visits by visitor type to English National Trails were: 42% by local residents, 26% by day visitors and 32% by overnight visitors

Figure 2.2 Visits by visitor type
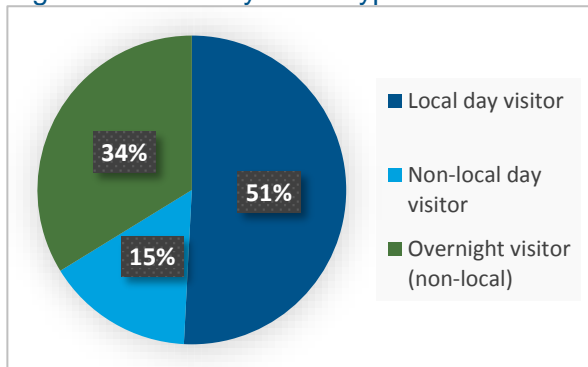
2.2.1.2 Visitor demographics

There was a roughly equal split in visitors' gender with the total number of male visitors being slightly higher than female visitors.

The majority of coastal path users (53%) were over 55 years old, with 28% over 65 years old. The proportion of visitors who were 65 years old or over was greater for day visitors (local or non-local) compared to overnight visitors.

Figure 2.3 Gender of visitors
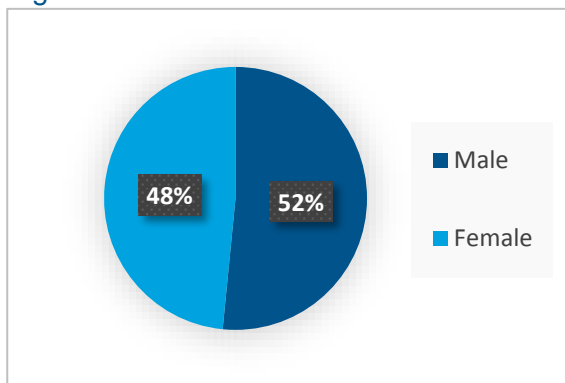
Visitors to coastal paths have a somewhat older age profile than is reported for visitors to other National Trails (where 17% are over 65 years old) and for all types of visit to the coast (where 22% are over 65 years old).

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[18] Natural Resources Wales (2014) Economic assessment of the health benefits of walking on the Wales Coast Path

[19] The South West Research Company Ltd (2013) South West Coast Path Monitoring & Evaluation Framework Year 1 Key Findings Summary

Figure 2.4 Age profile of visitors

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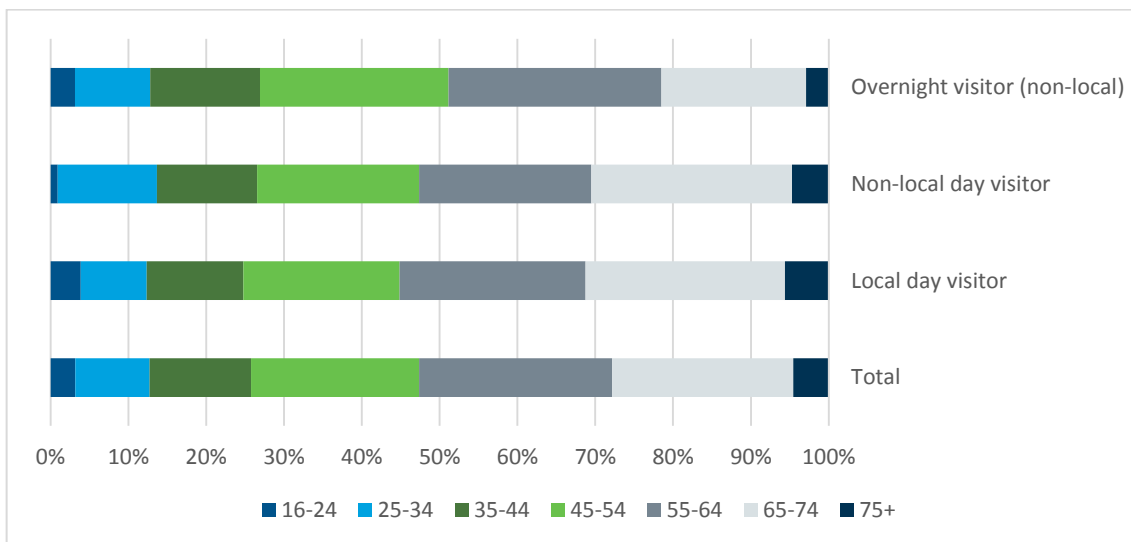
The majority of visitors were white British[20] (90%). This is the same proportion recorded for visitors to all English National Trails. This percentage was lower for overnight visitors to coastal paths (82%).

Figure 2.5 Ethnic group of visitors

Figure 2.5 Ethnic group of visitors
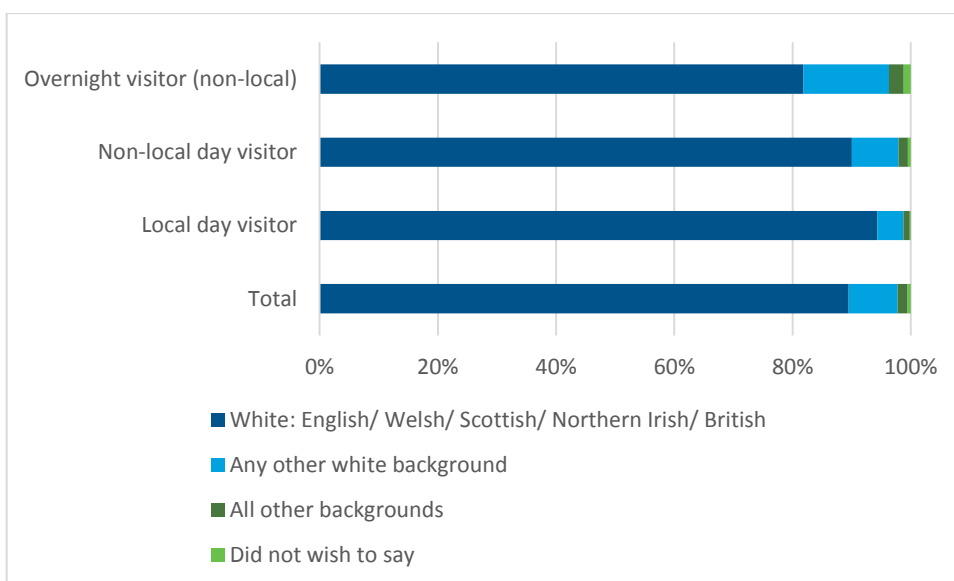
More detailed categories were used in the survey to capture ethnicity, but have been grouped due to the relatively low number of responses in these categories (see Questionnaire annex in Volume 2)

Most visitors were in some form of employment, full-time (45%) or part-time (15%). A considerable number of visitors were also retired (34%), which is linked to the age of the visitors presented in the previous figure.

A similar profile was recorded amongst vistors to National Trails and the coast more generally. For National Trails around two thirds of visitors are in employment (52% full-time and 12% part-time). For both National Trails and all coastal visitors, just under a third (29%) are retired.

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[20] Includes English/ Welsh/ Scottish/ Northern Irish.

Figure 2.6 Employment status of visitors
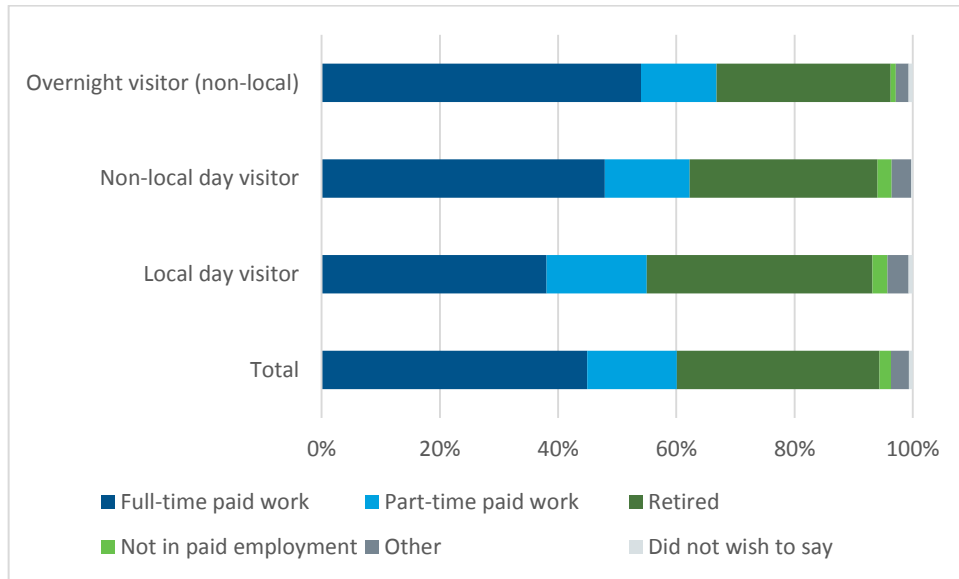
A large percentage of respondents (35%) did not wish to disclose their household income. For those who did the most common response was of an annual income between £10,000 and £29,000. Slightly higher salaries were reported by overnight non-local visitors.

Figure 2.7 Annual income levels of visitors
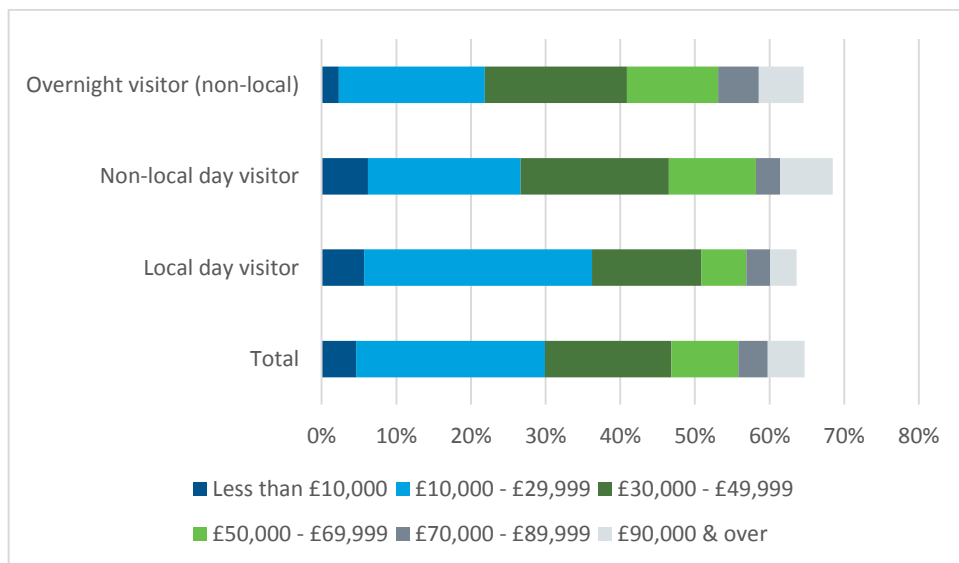
Coastal path users are well educated. Nearly 47% of visitors had at least a degree (or equivalent) compared to a national average of 27%[21]. A large number had attained A level qualifications or higher. Qualifications below A level or no qualifications were more common among local day visitors.

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[21] Available from the 2011 Census data. The above percentage represents the UK population aged 16 and over who achieved a level of qualification of Level 4 and above, qualification such as a degree or other higher qualification or equivalent.

Figure 2.8 Level of education of visitors
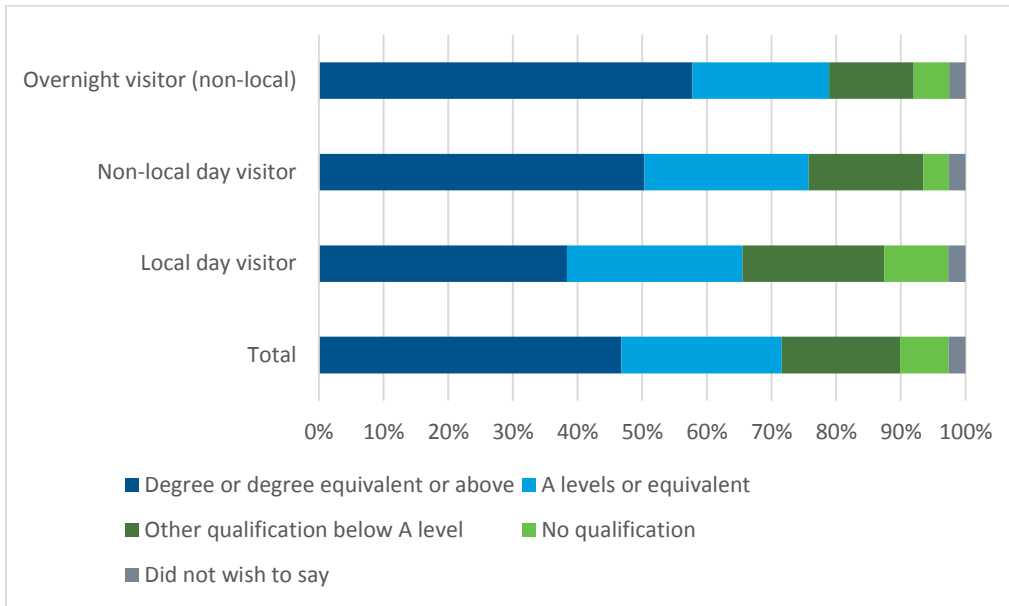
2.2.1.3 Visit group composition

The majority of visitors interviewed were walking on coastal paths alone (41%) or in a couple (34%). These are also the two most common for other National Trails. However, coastal paths attract a far higher proportion of walkers using the paths on their own than other National Trails, 41% compared to 25%.

Figure 2.9 Types of visitor groups
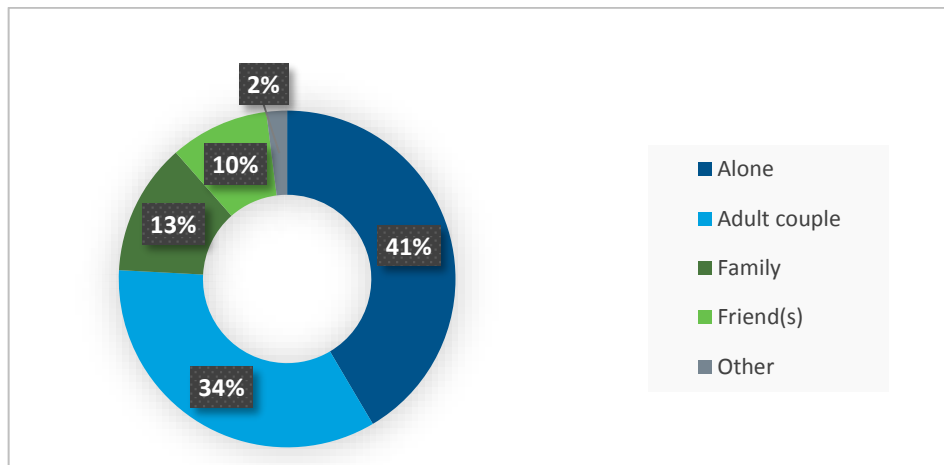
Coastal path local day visitors were more likely to be walking on the paths alone (64%) as opposed to non-local visitors and overnight visitors who were most likely to be walking in a couple (40% and 48% respectively).

This may reflect a high proportion of local dog walkers using the path alone. The proportion of local day visitors using the coast to walk with their dog was 51%, which was more than double the corresponding proportion for other types of visitors.

2.2.1.4 Mode of travel to coastal paths

More than half of all visitors (53%) travelled to coastal paths by car, and 39% travelled by foot. This is broadly in line with the use of these modes of travel for coastal visits in general, as reported by MENE (47% and 45% respectively). However, use of a car is markedly lower than for visitors to other English National Trails, where 79% of visitors travel by car.

Figure 2.10 Mode of travel to the coastal path
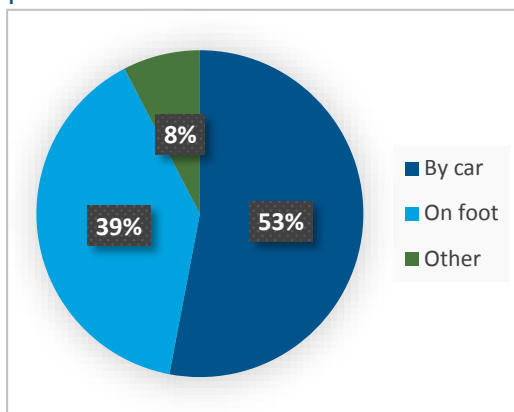
2.2.1.5 Duration and distance of walks on coastal paths

The average[22] amount of time spent on coastal paths is 90 minutes, with day visitors on average spending less time than overnight visitors (60 minutes compared to 120 minutes respectively).

The average trip distance is estimated to be 5km (3.1 miles)[23]. This is similar to distances seen on other coastal paths. The Welsh and the South West coastal paths estimated average trip distances at 4.4km[24] and 5.3km[25] (2.7 miles and 3.3 miles) respectively.

2.2.1.6 Personal benefits of using English coastal paths

Figure 2.11 shows that the use of English coastal paths provides a number of personal benefits. In particular, visitors agreed that they enjoyed their visit (99%), and that their visit made them feel calm and relaxed (96%), and refreshed and revitalised (97%), and that they took time to appreciate their surroundings (94%)[26].

Compared to visitors to other English National Trails or for all other types of coastal visits (MENE), the proportion of English coastal path users that reported that they strongly agreed with the above-stated positive statements on their personal benefits was markedly higher (Figure 2.12).

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[22] weighted median (please see Volume 2 for discussion on survey weighting)

[23] Estimated using the average walk duration from the visitor survey and assuming that coastal path users walk at 4kph (as stated in the Ramblers guidance on 'calculating walking pace') and an additional assumption, made for this study, that walkers walk for 50 minutes per hour, resting for the remaining 10 minutes.

[24] From page 11 of Natural Resources Wales (2014) Economic assessment of the health benefits of walking on the Wales Coast Path. Average distance calculated by measuring the distances of walks as reported by survey respondents by drawing their route onto a map.

[25] Weighted average of survey responses given on page 39 of The South West Research Company Ltd (2013). Calculated from a survey question asking for the total length of respondents' walk. Respondents selected a length range category as their response.

[26] All the statements in this paragraph represent visitors who stated that they 'Strongly agreed' or 'Agreed' with the relevant statements presented in the Figure 2.11.

English coastal paths visitors were least likely to report that they had 'learned something new about nature' (59%). This pattern was also seen amongst visitors to other National Trails and for all coastal visits in general (see Figure 2.12).

Figure 2.11 Visitor views on the personal benefits of using English coastal paths
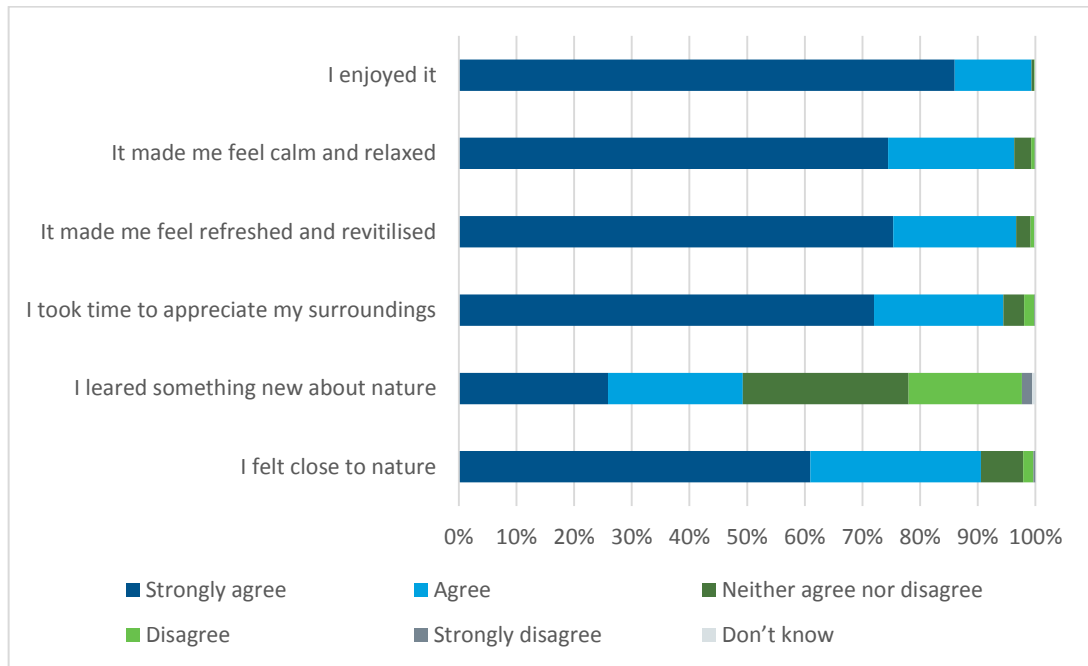
Figure 2.12 Visitor views of the personal benefits of using English coastal paths compared to other National Trails and all types of coastal visits
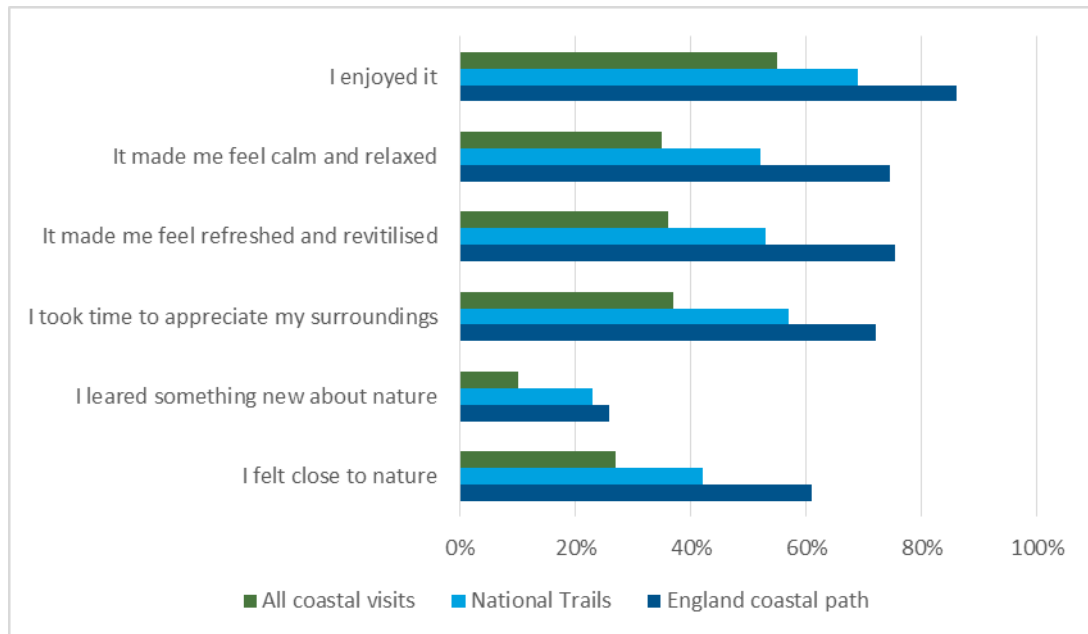
2.2.1.7 Alternatives

If coastal paths did not exist or were not accessible, 71% of visitors would have chosen a physical activity, such as walking or cycling, in the local area (within 10

miles). That was particularly preferred as an alternative option by local day visitors (81%). Non-local day visitors were more flexible with more than one in four (26%) indicating they would have done a physical activity somewhere else near the coast.

Figure 2.13 Visitors' likely alternative activities if coastal paths were not accessible
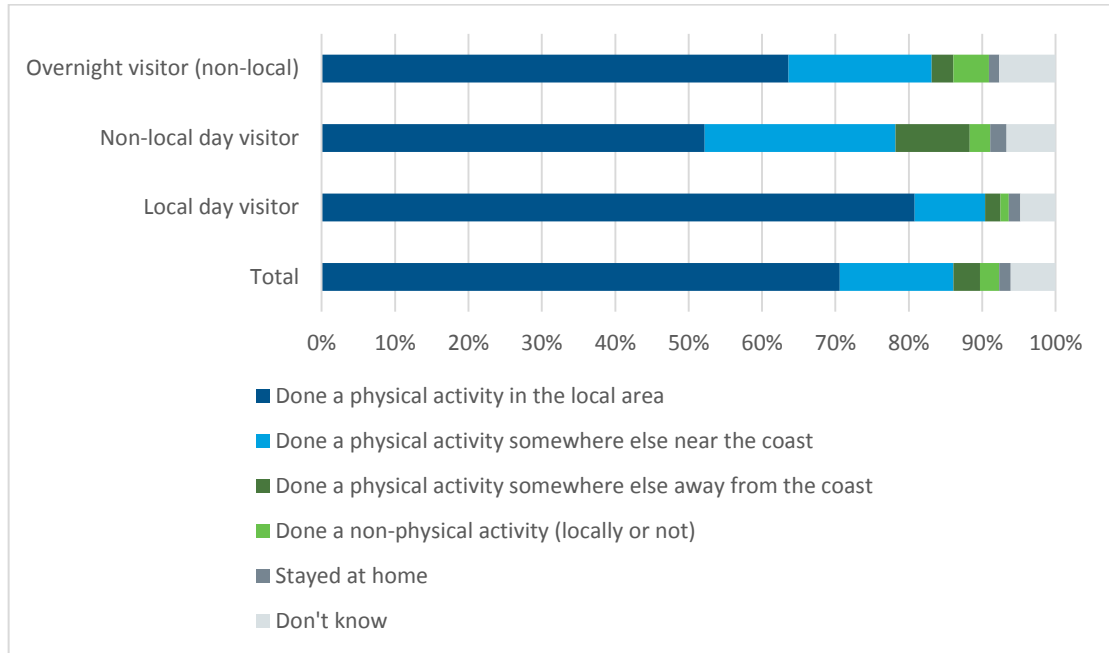
3 Baseline Assessment

3.1 Baseline contribution to the economy

3.1.1 Total expenditure

3.1.1.1 Average and total expenditure[27] of coastal path users

The average user spends £18.85 per day during a trip to English coastal paths, of which £17.36 (92%) is spent in local economies (within 10 miles of the coast). Average expenditures differ significantly between different types of visitor:

■ Local day visitors[28] spend an average of £1.71 per day during their trip, of which £1.67 (98%) is spent in local coastal economies.

■ Non-local day visitors[29] spend an average of £11.38 per day during their trip, of which £8.65 (76%) is spent in local coastal economies.

■ Overnight visitors[30] spend an average of £39.14 per day during their trip, of which £36.73 (94%) is spent in local coastal economies.

These averages include visits with no expenditure, most of which were associated with day visits by local residents.

Box 3.1 provides a comparison of these average expenditure estimates with those produced by previous national surveys for similar types of activity. The comparison shows that the average expenditures of English coastal path users are comparable with similar estimates for the Wales Coast Path, but indicate that expenditure by coastal path users may be slightly lower than that for other coastal activities.

The average expenditure estimates were applied to visit numbers to produce estimates of total expenditure in the national (England) economy as a whole. Total expenditure is also isolated just for coastal economies local to the English coastal paths (see Table 3.1). The results suggest that coastal visitors who use English coastal paths spent £550m in 2017, of which £506m was spent in local economies (within 10 miles of the coast). Disaggregating results by visitor type suggests that:

■ Local day visitors account for 41% of all visits to English coastal paths but only 4% of the associated spend in both the national and local coastal economies.

■ Non-local day visitors account for 18% of all visits but only 11% of the associated spend in the national economy and 9% in local coastal economies[31].

■ Overnight visitors account for 41% of all visits and 86% of the associated spend in the national economy and 87% in local coastal economies.

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[27] Based on the visitor survey questions "How much do you and your immediate party (e.g. family/spouse) expect to spend during your whole trip today?" and "how many people does this expenditure cover?" Expenditure includes accommodation, travel, food and drink and other costs.

[28] Local day visitors are defined as local residents, living within a 10 mile radius, who have taken a day trip to visit the coast path (and are not staying away from home overnight as part of their trip).

[29] Non-local day visitors are defined as UK residents, living more than 10 miles away, who have taken a day trip to visit the coast path (and are not staying away from home overnight as part of their trip).

[30] Overnight visitors are defined as those who are staying away from home overnight as part of their trip to visit the coast path. Overnight visitors include overseas visitors and UK residents, living more than 10 miles away.

[31] The local coastal economy is a subset of the national economy.

Box 3.1   Comparison to other estimates of average visitor expenditure

A number of other studies have produced similar estimates of visitor expenditures. All of the estimates included below are adjusted to 2017 prices to enable comparison with the results of this study.

The closest comparator is the **Wales Coast Path Visitor Survey**[32], which uses the same definitions of a visitor and expenditure as this study[33].

Table B3.1a: Average visitor expenditure comparison with the Wales Coast Path

	Wales Coast Path	English coastal paths
Day visitors (local & non-local)	£4.15	£4.62
Overnight visitors	£34.20	£39.14

The **Monitor of Engagement with the Natural Environment (MENE) survey** provides estimates of average expenditures for all visitors (excluding accommodation costs)[34].

Table B3.1b: Average visitor expenditure comparison with all visits to natural environment locations (from MENE)

	MENE coastal visits	MENE countryside visits	MENE urban green space visits	English coastal paths
All visitors (excluding accommodation costs)	£18.63	£5.78	£6.54	£11.18

Expenditure estimates for the **South West Coast Path**[35] are higher than for the English coastal paths, although they are based on different assumptions to the above studies.

Table B3.1c: Average visitor expenditure comparison with the South West Coast Path

	South West Coast Path	English coastal paths
Day visitors (local & non-local)	£20.29	£4.62

Data from the **GB Day Visits Survey** (GBDVS) and **GB Tourism Survey** (GBTS) can also be disaggregated to focus on trips to the coast/seaside in England and all outdoor activities in general**[36]**. This provides the following comparisons.

Table B3.1d: Average visitor expenditure comparison with seaside/coastal and all outdoor activity visits (from the GBDVS and GBTS)

	Seaside/coastal trips in England	All outdoor activity visits	English coastal paths
Day visitors (local & non-local)	£27.33	£13.00	£4.62
Overnight visitors	£59.31	-	£39.14

The GBDVS figure is based on all visits of 3+ hours in duration, so excludes lower value, shorter visits (e.g. from local residents). GBDVS and GBTS both use a much broader definition of visits that extends far beyond coastal path users. These two factors may explain the difference between these estimates and the English coastal paths estimates. The estimate of approximately £13 per visit for those participating in outdoor activities is closer to the estimates produced by this study (but does cover inland and coastal areas).

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[32] Natural Resources Wales (2016). The Wales Coast Path Visitor Survey 2015 - The Economic Impact of Coastal Walking in Wales 2014. Adjusted to 2017 prices using HM Treasury GDP Deflator.

[33] Both studies include visits with no expenditure and have assumed that only one night's expenditure for each overnight trip was related to the coast path.

Table 3.1 Average and total expenditures of English coastal path visitors by visitor type (2017)

Visitor type	Average (£/person/day)	Number of visits (million)	Total (£million)
National economy			
Day visitor (local)	£1.71	11.9m	£20.4m
Day visitor (non-local)	£11.38	5.1m	£58.6m
Overnight visitor (non-local UK and non-UK)	£39.14	12.0m	£470.9m
All visitors	£18.85	29.1m	£549.9m
Local coastal economies			
Day visitor (local)	£1.67	11.9m	£19.9m
Day visitor (non-local)	£8.65	5.1m	£44.5m
Overnight visitor (non-local UK and non-UK)	£36.73	12.0m	£441.2m
All visitors	£17.36	29.1m	£506.3m

Note: National economy is inclusive of local coastal economies.

Figure 3.1 presents expenditures disaggregated across different expenditure categories and types of visit. The main contribution to expenditure comes from accommodation costs (41% of total expenditure), followed by purchases of food and drink (23% of total expenditure).

Figure 3.1 also shows some differences between the expenditures of the different types of visitor. For example:

■ Most of the expenditures of local day visitors were spent on food and drink (69%). Expenditures were significantly lower for travel (16%) and other purchases (11%), which is likely to reflect the shorter distances travelled for local residents and a lower likelihood of purchasing souvenirs or participating in other activities during the trip.

■ Expenditures of non-local day visitors were split more evenly between food and drink (45%) and travel (36%), as a result of the greater distances travelled to access the coast path. Other purchases (14%) were similar to those for local day visitors.

■ Almost half of the expenditure of overnight visitors (48%) was spent on accommodation. This was followed by expenditure on food and drink (18%), travel (9%) and other purchases (9%). The unknown spend was higher for this type of visitor (17%), which suggests that overnight visitors were less certain about their patterns of expenditure.

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[34] Natural England (2016), Monitor of Engagement with the Natural Environment – The national survey on people and the natural environment. Adjusted to 2017 prices using HM Treasury GDP Deflator.

[35] The South West Research Company (2015), South West Coast Path Monitoring & Evaluation Framework Year 4 (2014) Key Findings Summary. Adjusted to 2017 prices using HM Treasury GDP Deflator.

[36] Visit Scotland, Visit Wales, Visit England (2017) The Great Britain Day Visitor 2016 annual report; and The GB Tourist 2016 Annual Report. Adjusted to 2017 prices using HM Treasury GDP Deflator.

Figure 3.1   Breakdown of total expenditures in the national economy by item (2017)
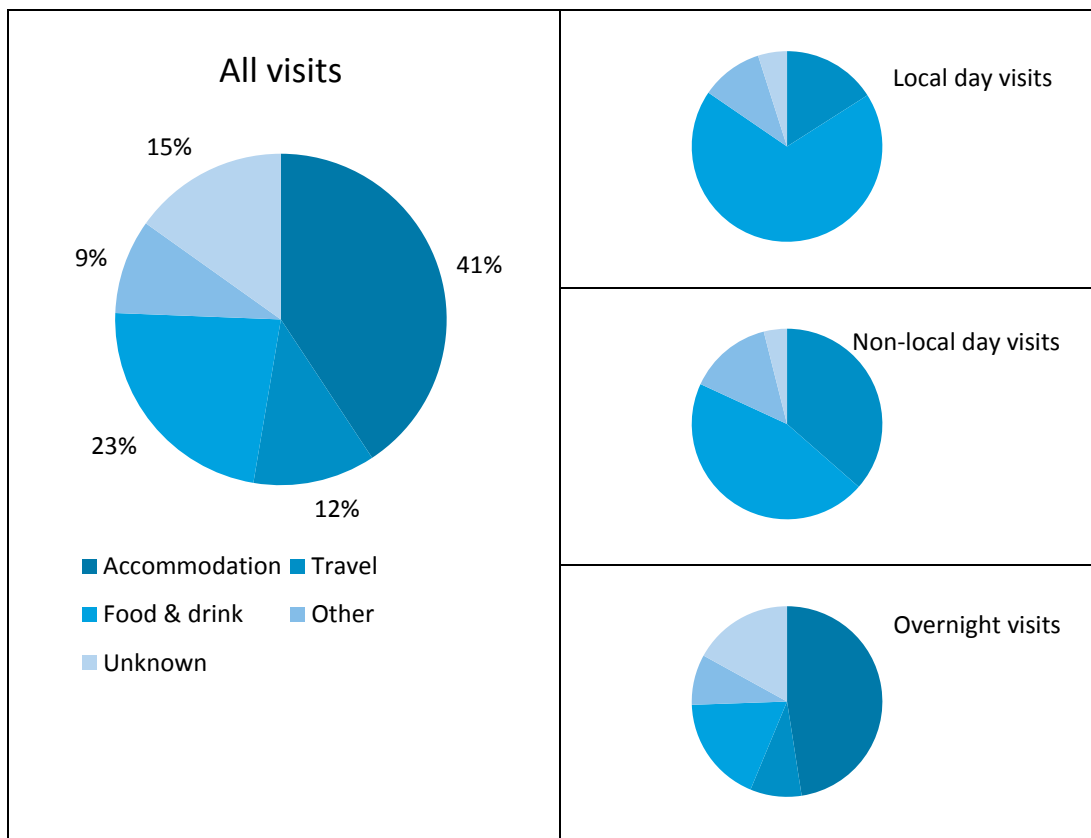
Note: Other expenditures comprise all other purchases including equipment, souvenirs, other activities, etc.

3.1.1.2   Total expenditure of coastal path users that is attributable to the coastal paths

Visitor expenditures were attributed to English coastal paths where use of the paths themselves was a specific reason for the trip. For example, visitor expenditures were not attributed to the coastal paths for someone deciding to visit a seaside resort because of the beach and local restaurants, but then discovering and using a coastal path while they were there. In this example, coastal paths were not a motivating factor for the trip so the expenditure of the trip (e.g. on accommodation, food and drink) as the expenditure would have occurred even if there were no coastal paths. Motivation for visitors' trips is drawn from the visitor survey (see Table 3.2).

Table 3.2   Extent to which walking along the coast was a reason for the trip (% of respondents and their immediate parties)

	Day visitor (local)	Day visitor (non-local)	Overnight visitor (non-local UK and non-UK)	All
Main reason for the trip	71%	59%	60%	64%
One of the reasons	26%	35%	35%	32%
Not a specific reason	2%	5%	4%	4%
Total	**100%**	**100%**	**100%**	**100%**

Motivating factors[37] were applied to the total visitor expenditures. As a result, attributable expenditures are estimated to represent:

- 78% of the total expenditures of local day visitors.

- 68% of the total expenditures of non-local day visitors.

- 69% of the total expenditures of overnight visitors.

Total attributable expenditure of users of coastal paths are estimated to be £379m, of which £350m was spent in local coastal economies (see Table 3.3). Overnight visitors are the largest contributors, accounting for 85% of all attributable expenditure and 87% of attributable expenditure in local coastal economies. Non-local day visitors account for 10% of all attributable expenditures and 9% in local coastal economies, while local day visitors account for the remaining 4% of attributable expenditures in the national economy and local coastal economies.

Table 3.3   Total and attributable expenditures of coastal path users (£million, 2017)

	Total	Attributable
National economy		
Day visitor (local)	£20.4m	£15.9m
Day visitor (non-local)	£58.6m	£39.7m
Overnight visitor (non-local UK and non-UK)	£470.9m	£323.8m
All visitors	£549.9m	£379.4m
Local coastal economies		
Day visitor (local)	£19.9m	£15.5m
Day visitor (non-local)	£44.5m	£30.2m
Overnight visitor (non-local UK and non-UK)	£441.2m	£303.9m
All visitors	£506.3m	£349.6m

3.1.2   Baseline contribution to national and local coastal economies

This section presents the contribution of coastal paths to the national economy and local coastal economies. The contribution is calculated based on the level of expenditure attributable to English coastal paths (Table 3.3)[38]. The contribution to local coastal economies focuses exclusively on additional, non-local expenditures and does not include expenditures of local residents[39].

Spending by visitors generates turnover for local businesses, which directly supports gross value added (GVA)[40] and employment in the local economy. Table 3.4 shows that the attributable expenditures are estimated to directly support a total of £190m of

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[37] The factors are calculated by assuming that that attributable expenditure includes 100% of visitor spend where the coast path was the main reason for the trip, and 25% of visitor spend where it was one of the reasons, and excludes all spend where it was not a specific reason for the trip.

[38] See Volume 2 for details of the methodology for calculating attributable expenditure.

[39] Expenditures of local residents do not represent additional expenditures for the local economy, as they would be expected to have spent their money on other things in the local area in the absence of the coast path; whereas non-local visitors would be unlikely to have spent money in the local area

[40] GVA measures local output and comprises wages, profits and rents. It excludes that part of their turnover which businesses use to purchase goods and services from other businesses; therefore the direct effect on GVA is less than the value of visitor expenditure.

GVA and 6,740 FTE jobs in the national economy, and £175m of GVA and 6,270 FTE jobs in local coastal economies.

It is unlikely that money spent by visitors to English coastal paths has much of an additional impact on the national economy. Most of these visitors are English residents, and, in the absence of the coastal paths, would likely spend their money elsewhere in the country, supporting GVA and jobs elsewhere in the national economy. Similarly money spend by residents local to coastal paths will have little additional impact on coastal economies as, in the absence of the coastal paths, they would likely spend their money elsewhere in the coastal economy.

However, coastal paths do have an additional impact on local coastal economies, by attracting non-local visitors who spend money, thereby increasing GVA and employment in these coastal areas. As well as direct effects on GVA and employment, visitor expenditure has further benefits through multiplier effects, as some of the money is re-spent by businesses (indirect effects) or by employees (induced effects).

Table 3.5 presents estimates of the total GVA and employment impacts of the *additional* **(i.e. non-local) visitor expenditures in local coastal economies** that can be attributed to coastal paths. It shows that the additional expenditure within local coastal economies is estimated to be £334.1 million, supporting £167.3 million of GVA and 5,930 FTE jobs.

A local multiplier of 1.25[41] was applied to account for the indirect and induced effects that arise as a result of these additional visitor expenditures (i.e. the indirect and induced effects are estimated to add a further 25% to the direct GVA and employment impacts). The total direct, indirect and induced impacts of the additional visitor expenditures are therefore estimated to support £209m of GVA and 7,410 FTE jobs in local economies within 10 miles of the coast path.

Table 3.4 Direct GVA and employment impacts of attributable expenditures (2017)

	Attributable expenditure (£m)	GVA (£m)	Jobs (FTE)
National economy			
Day visitor (local)	£15.9m	£7.3m	350
Day visitor (non-local)	£39.7m	£18.4m	710
Overnight visitor (non-local UK and non-UK)	£323.8m	£164.5m	5,680
All visitors	£379.4m	£190.3m	6,740
Local coastal economies			
Day visitor (local)	£15.5m	£7.2m	340
Day visitor (non-local)	£30.2m	£13.8m	580
Overnight visitor (non-local UK and non-UK)	£303.9m	£153.5m	5,350
All visitors	£349.6m	£174.5m	6,270

Note: National economy is inclusive of local coastal economies.

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[41] Homes and Communities Agency (2013), Additionality Guide: Fourth Edition 2014

Table 3.5 Additional attributable contribution to local coastal economies (including direct, indirect and induced impacts) (2017)

	Additional expenditure (£m)	Additional GVA (£m)	Additional Employment (FTE)
Contribution to local coastal economies by non-local visitors			
Direct impact	£334.1m	£167.3m	5,930
Indirect & induced impact	£83.5m	£41.8m	1,480
Total impacts	£417.6m	**£209.1m**	**7,410**

3.2 Baseline value of recreational wellbeing

3.2.1 Estimation of respondent's costs of travel

The survey found that the main types of travel to English coastal paths are by car (51% of all trips), and on foot (43% of all trips). There were significant[42] differences in the modes of transport used by day and overnight visitors. Of the day visitors, 57% used their cars and 37% walked, while 39% of overnight visitors used their cars, with 53% walking to the paths.

Table 3.6 provides a breakdown of the mean return travel distance to English coastal paths, and time taken by mode of transport. People who travelled by train, on average, travelled the furthest[43]. Visitors using other forms of motorised transport generally travelled an average of around 30 miles. Visitors walked, on average, 4 miles to reach the path[44].

People who travelled by train, on average, spent the longest time travelling (day visitors spent on average 240 minutes, and overnight visitors 142 minutes). Those who used their cars, on average, had a return travel time of just under 1 hour, while walkers took over an hour to reach the path.

Table 3.6 Travel distance and time by mode of transport and type of visitor

		Car	Train	Public bus	Coach trip	Motorcycle	Bicycle	On foot	Wheelchair	Boat	Taxi	Other
Distance (miles)	Day visitor	32	129	36	33	7	2	4	1	9	-	-
	Overnight visitors	28	72	25	14	5	12	3	1	7	18	106
Time (minutes)	Day visitor	56	240	78	168	20	24	70	26	180	-	-
	Overnight visitors	52	142	58	92	10	62	68	26	134	44	134

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[42] Throughout this section, differences described in the text are statistically significant at the 95% confidence limit.

[43] Travel distances were calculated based on the address that visitors had travelled from that day. For many overnight visitors this would have been their local holiday accommodation address. This is likely to explain why travel distances were lower for overnight visitors than day visitors.

[44] It is likely that this high distance walked to the coastal path is due to (i) people who were doing walks that were not solely on coastal paths (and hence not walking directly to the path) and (ii) the method used to establish travel distances which was based on root postcodes / town names which may not be 100% accurate

Table 3.7 provides a summary of the mean costs incurred by mode of transport and visitor type. Trips involving motorised forms of transport incurred costs associated with fuel and non-fuel vehicle costs and the cost of time spent travelling, while non-motorised modes only incurred the costs of time. On average, day visitors incurred higher travel costs (£9.12) than overnight visitors (£7.30).

Table 3.7 Average return travel costs (of transport and time) by mode of transport and visitor type (2017)

Mode of transport	Day visitors				Overnight visitors			
	Fuel cost (£)	Non-fuel cost (£)	Time cost (£)	Travel cost (£)	Fuel cost (£)	Non-fuel cost (£)	Time cost (£)	Travel cost (£)
Car	3.21	2.00	4.60	**9.81**	2.80	1.75	4.30	**8.87**
Train	12.85	8.02	19.80	**41.17**	7.34	4.58	11.70	**23.56**
Public bus	3.68	2.29	6.30	**12.32**	2.55	1.59	4.70	**8.85**
Coach trip	3.39	2.11	13.80	**19.33**	1.38	0.86	7.60	**9.82**
Motorcycle	0.75	0.47	1.60	**2.79**	0.54	0.34	0.80	**1.70**
Bicycle	0	0	2.00	**2.00**	0	0	5.10	**5.10**
On foot	0	0	5.8	**5.8**	0	0	5.6	**5.6**
Wheelchair	0	0	2.10	**2.10**	0	0	2.10	**2.14**
Boat	0.96	0.60	14.80	**16.31**	0.75	0.47	11.00	**12.23**
Taxi	.	.	.	**.**	1.80	1.12	3.60	**6.55**
Other	.	.	.	**.**	10.75	6.70	11.00	**28.48**
All respondents	**2.21**	**1.38**	**5.50**	**9.12**	**1.32**	**0.83**	**5.10**	**7.30**

Note: Travel costs were estimated by summing fuel costs, non-fuel costs and travel time costs. Fuel and non-fuel were estimated by multiplying the return travel distance with the Department for Transport 's standardised 'Vehicle operating costs, while the travel time cost was estimated by multiplying the return travel time with Department for Transport's 'market price values' for 'non-working – other' travel (which for 2017 was £4.94 / hr).

3.2.2 The average recreational wellbeing value per visit

The average recreational wellbeing value per visit to English coastal paths was estimated using 'count' travel cost models. Tests found that the models were a good fit to the data, and that the variables on visit/visitor characteristics significantly improve the models. The models found that:

■ In the count models, the travel costs variables are (as expected) significant and negative – respondents made fewer trips as travel cost increased.

■ More highly educated people, people with lower incomes, females and older people tended to make more trips.

Two estimates of the average recreational wellbeing value were generated using two variants of the model. Testing indicates that the variant B (the Negative binomial (NB) model) is more suited to the analysis of trips (and therefore likely to perform better) than the variant A (the Poisson model).

Across all study survey sites, the average trip to an English coastal path generated a recreational wellbeing value of £62 (see Table 3.8).

Table 3.8   Estimated average recreational wellbeing value per visit to English coastal paths (2017)

	Model variant B - Negative binomial
Recreational wellbeing value per trip (£)	£62.50 (£52.63 to £76.92

To put these values into context, we compare the coastal paths wellbeing value per trip with those from other related TCM studies (Table 3.9):

■ The value of the average 18 minute walking trip is estimated to be £4.68 and the value of the average 24 minute cycling trip is estimated to be £6.24[45].

■ The value of recreation trips in green belts and urban fringe was estimated to be £5.36 per trip, and in grassland £1.54 per trip[46].

■ The value of recreational trips to UK forests was estimated to be approximately £15 per trip[47].

It is likely that the higher values estimated for trips to English coastal paths reflect the greater distances people are willing to travel, and frequency with which they are willing to travel, to walk along the coast path compared to more general walking trips.

Other studies that have valued more specialist outdoor pursuits tend to find higher values for these activities. For example:

■ The value of sea angling trips in Ireland was estimated to be €242 per trip[48].

Given the specialist attraction of coastal walking, the estimated values per trip for the English coastal paths are considered to be within the expected range.

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[45] Estimated based on data from Abrantes, P, Ellerton, T and Haines-Doran T (2016) The Case for Active Travel: How walking and cycling can support more vibrant urban economies. Urban Transport Group: Leeds

[46] Sen, A., Harwood, A.R., Bateman, I.J., Munday, P., Crowe. A., Brander, L., Raychaudhuri, J., Lovett, A.A., Foden, J. and Provins, A. (2014). Economic assessment of the recreational value of ecosystems: methodological development and national and local application. Environmental and Resource Economics

[47] Christie M, Hanley N, Garrod B, Hyde T, Lyons N, Bergmann E, Hynes S (2006). Valuing heterogeneity of forest recreation activities: Final report. Forestry Commission: Edinburgh

[48] Hynes S, Gaeven, R and O'Reilly (2017). Estimating a total demand function for sea angling pursuits. Ecological economics 134, 73-81

Table 3.9 A comparison of average recreational wellbeing values with other studies

Recreation activity	Value per trip	Valuation method	Source
English coastal path (based on the NB Model (variant B))	**£62** **(£53 - £77)**	**Count TCM**	**This study**
Walking trip -average 18 mins (UK)	£4.86	Count TCM	Abrantes et al (2016)
Cycling trip - average 24 mins (UK)	£6.24		
Greenbelt and urban fringe (UK)	£5.36	Meta-analysis	Sen et al (2014)
Mountain, moors and heathland (UK)	£5.03		
Marine and coastal (UK)	£3.96		
Woodlands and forest (UK)	£3.34		
Freshwater and floodplains (UK)	£1.82		
Grassland (UK)	£1.54		
Forest recreation (UK)	£15	Count TCM	Christie (2006)
Sea angling (Ireland)	€242	Count TCM	Hynes et al (2017)

3.2.3 Total recreational wellbeing value of English coastal paths

The annual recreational wellbeing value of visits to English coastal paths is estimated to be £1.8 billion per year, with a range of £1.5 billion to £2.2 billion (Table 3.10). This is estimated by applying the average value per trip (from Table 3.8) to the estimated 29.1 million visits to the path each year (from the VVM).

Table 3.10 Total recreational wellbeing values of English coastal paths (2017)

	Model variant B (Negative binomial)
Value per visit (£ / visit)	£62.50 (£52.63 to £76.92
Volume of visits (n)	29.1m
Total recreational wellbeing value (£m / year)	£1,819m (£1,532m to £2,239m)

3.3 Baseline value of physical health benefits

3.3.1 Value of physical health benefits

An estimated 2.2m people visited English coastal paths in 2017 over a total of 29.1m trips. Approximately 8% of coastal path visitors are expected not to have done any other physical activity had they not been using a coastal path[49]. Therefore it is assumed that this 8% - 182,207 people - walked because of the path and experienced an increase in their physical activity. The average duration of a walk on coastal paths was 90 minutes[50].

This increase in physical activity is expected to lead to reduction in the risk of premature mortality among these walkers, amounting to **an estimated 11 fewer deaths** among the walkers (compared to people not walking). **These health benefits are valued at £19 million per year[51]** (see Table 3.11)

The estimate of health benefits takes account of the extent to which coastal path users would have undertaken the same level of exercise (and hence received the same health benefits) if it were not possible for them to use the coastal path. This information was collected by the visitor survey, which asked respondents what they would have done if they had not been able to access that particular stretch of coastal path.

The results show that English coastal paths have significant health benefits, which can be converted into tangible economic values. This can be considered a relatively conservative estimate of the health benefits. Firstly, the HEAT tool only considers reductions in mortality and does not, for example, estimate benefits from reduced illness, such as diabetes or obesity-related conditions. Secondly, the estimate is based only on those walkers who would not have done a physical activity instead had they not been using the coastal paths (the 8% discussed above).

If the physical health benefits of walking on coastal paths is assumed to apply to all users then the resulting estimate is for 133 fewer deaths among the English coastal paths walkers, compared to non-users, valued at £231 million per year. This is the health benefit that is supported by English coastal paths for all walkers, including users who would have undertaken physical activity anyway if the paths were not available. Of this, 92% of the value cannot be attributed to the paths because 92% of the users would have done another physical activity in the local area if they had not had walked on the paths and hence received the same health benefits.

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[49] Based on response to the visitor survey.

[50] Weighted median of all walkers, from visitor survey.

[51] Using the current Department for Transport value of a life, adjusted to 2017 prices using HMT GDP Deflator, of £1.735m. From https://www.gov.uk/government/publications/webtag-tag-data-book-december-2017

Table 3.11 HEAT Results: for all English coastal paths walkers (2017)

Variable	Result
Number of walkers (million)*	0.182
Total trips per year (million)*	2.108
Median duration per walk (minutes)*	90
Minutes walked per person per day*	3.29
Lives saved per year due to total walking	11
Value of lives saved per year (£million)	£19

Note: * data is from the visitor survey and visitor volume model

There are no directly comparable HEAT analyses on the WHO database[52] [53], as the vast majority focus on cycling, and are pre-post studies (valuing an increase in walking or cycling rather than the current level of usage). Most of the HEAT case studies report far lower values, as they are valuing only the measured or projected increase in cycling or walking.

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[52] http://www.euro.who.int/en/health-topics/environment-and-health/Transport-and-health/activities/guidance-and-tools/health-economic-assessment-tool-heat-for-cycling-and-walking/examples-of-applications-of-the-health-economic-assessment-tool-heat-for-walking-and-cycling

[53] Comparison with a HEAT assessment of Wales Coast Path was not possible due to differences in the methodologies used.