



South West
Coast Path
NATIONAL TRAIL



a regional resource for
wealth and health

Julian Gray, Director
South West Coast Path Association
16 October 2019
RTPI, Eden Project

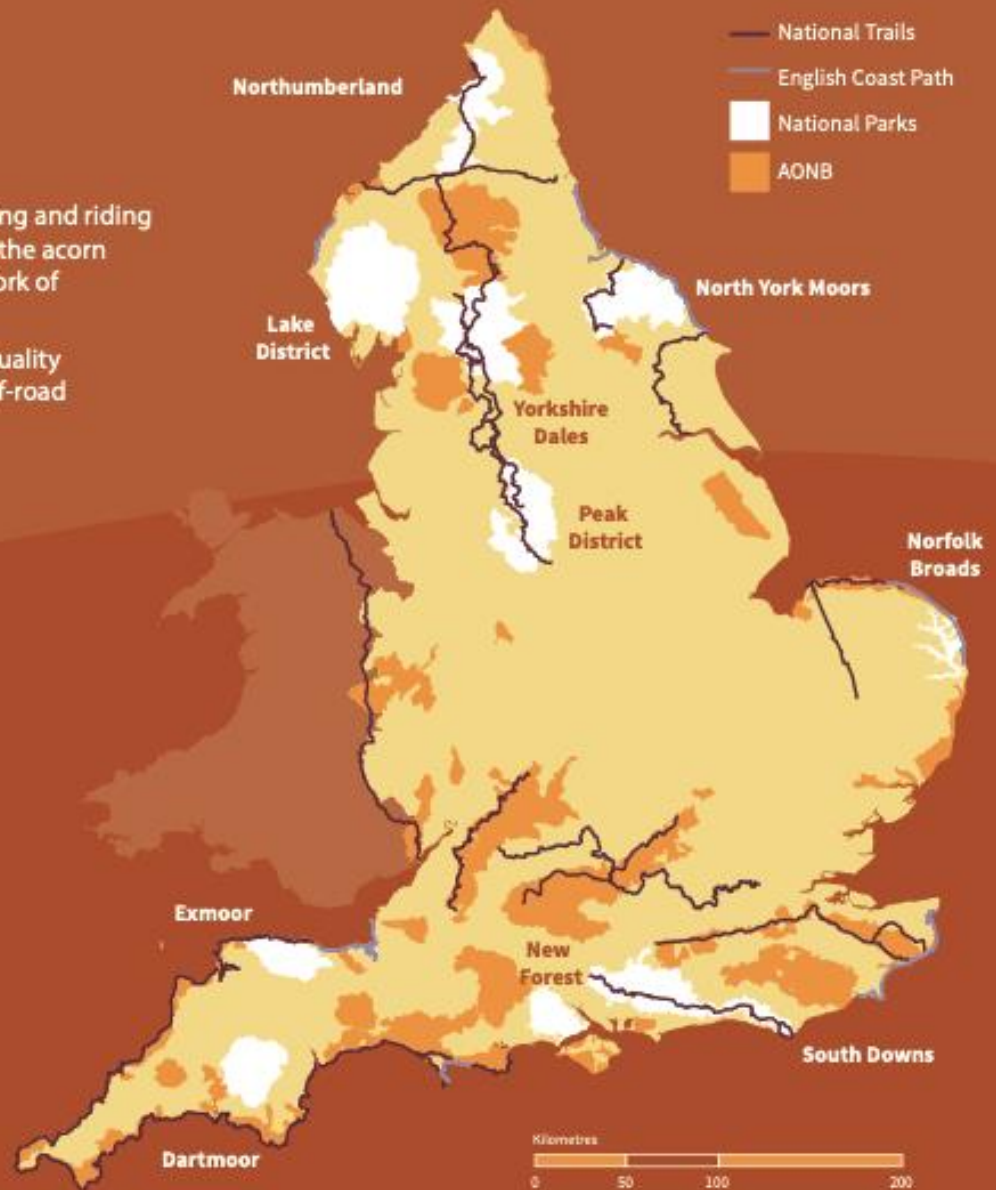
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- A scenic view of a coastline with a grassy cliff in the foreground. Three people are sitting on the cliff, looking out over a sandy beach and the ocean. The sky is blue with some clouds. The text is overlaid on the right side of the image in four colored boxes.
- National Trails in England
 - South West Coast Path
 - Visitor Economy
 - Health & Wellbeing



NATIONAL TRAILS OF ENGLAND

The National Trails provide some of the nation's highest quality walking and riding experiences and all of the routes are signposted and promoted with the acorn symbol. The National Trails are managed locally but within a framework of guidance and support provided by Natural England.

Our vision for National Trails is that they are a Family of the highest quality recreational routes connecting our finest landscapes for extensive off-road journeys.



13

NATIONAL TRAILS

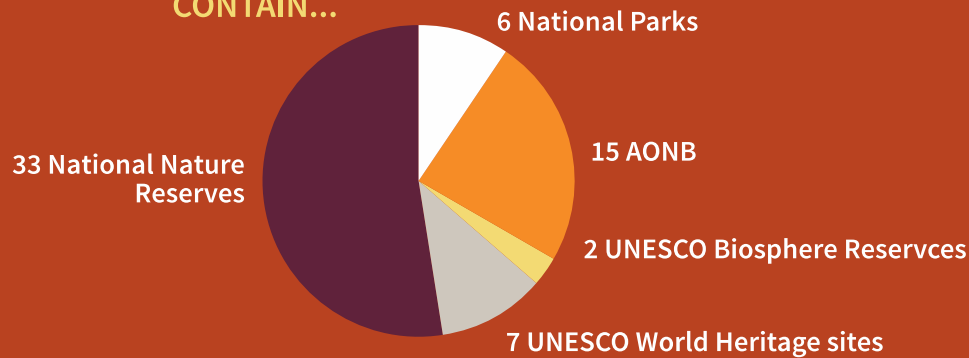
in England & Wales stretches



2200 miles / 3541 Km

THE NATIONAL TRAILS...

CONTAIN...



VISITORS

83^m day visits



PUBLIC SPENDING

on National Trails



3p
pence per person

VOLUNTEERS SPEND



3,000

working days.
Saving...

£150^k



BUSINESSES ON NT WEBSITE



3,766

WHICH HAS...



1.6m

Visitors per annum



SPENDING

£533^m

WALKING & CYCLING

On the NT's



Saves the NHS

£1^{bn}

VISITORS



On going home...

Left calm and relaxed

AWARD WINNING



Outstanding Contribution to Tourism
(South West Coast Path)

Top 10 mountain bike routes in the world
(The South Downs Way)


DISTANCE FROM A NATIONAL TRAIL

anybody in the UK



52 miles

England Coast Path National Trail



Marine and Coastal Access Act 2009
2,600 miles around the Coast of England
In SW mainly follows route of Coast Path

70th Anniversary of National Parks & Access to the Countryside Act

2019 Glover review of Protected Landscapes

“Long distance footpaths were a central, founding part of the movement 70 years ago. The 1947 Hobhouse Report established the idea of long distance paths which were seen as integral to proper access to and through national landscapes. Seventy years on, there are 13 National Trails across England delivering long-distance paths that help people access, experience and enjoy our finest landscapes.”



**South West
Coast Path**
NATIONAL TRAIL 

The South West Coast Path
was designated a National
Trail in 1978

**Coordinated through a Trails Partnership
comprising: Cornwall, Devon, Dorset,
Somerset, Torbay, and Plymouth City
Councils, Exmoor National Park, the
National Trust, Natural England and the
South West Coast Path Association**





South West
Coast Path
Association

Our Vision: Protecting and improving the South West Coast Path as one of the world's great trails, now and for future generations.

630 Miles – over 1,000 kms long



Historically used as a coastguard path...



... and by customs officers to catch smugglers

Climb of 115,000 ft / 35,000 m



4 x the ascent of Mt. Everest

**Normal time to complete
6-8 weeks +**



Official Record time: 10 days 15 hours, 18 mins



Over 70% of the Path within National Parks
& Areas of Outstanding National Beauty
(IUCN Class V living landscapes)



13 Marine Conservation Zones 8 Special Areas of Conservation

2 x UNESCO World Heritage Sites
UNESCO Geopark



5 Ramsar Sites

7 Special Protection Areas

UNESCO Biosphere Reserve

50 National and Local Nature Reserves

100's of Sites of Special Scientific Interest



... and many significant heritage sites,
historic monuments, forts & castles



On the edge of the land and the sea
we are seeing the impact of climate change

Visitor Economy



The SW Coast Path receives
9 million visits per annum

Visitor Economy

A scenic view of a coastal village, likely Mousehole in Cornwall, England. The foreground shows a white boat with 'MOUSEHOLE' written on its side, resting on a stone pier. The harbor is filled with various boats, including small fishing boats and larger yachts. The background features a hillside covered in stone buildings, typical of the region, under a blue sky with scattered clouds.

... which generate over £500 million to the local economy per annum

Supporting 11,000 jobs

Visitor Economy



Issue: spreading seasonality and points of access

Visitor Economy



Discover England Fund Pilot Project
Targeting Dutch & German Markets

Promoting off-season itineraries



Exmoor • Minehead to Combe Martin



North Devon and Cornwall Atlantic Coast • Clovelly to Tintagel



West Cornwall • Mounts Bay to St Ives



Clovelly Harbour
Photographer: Rob Kendal

Consumer & Trade Marketing



**3,750
CONSUMER
CONVERSATIONS**



**VAKANTIE
BEURS
VAKDAGEN**
10 - 11 JANUARI 2017
WAAR REISPROFESSIONALS SAMENKOMEN



**THE WORLD'S
LEADING TRAVEL
TRADE SHOW®**

**POTENTIALLY
350,000
CONSUMERS**

**1,250
PRE-FILLED
BAGS**



Results

COVERAGE OF
TOTAL MEDIA OVER
£1.3
MILLION



92%
INCREASE
OF WEBSITE VISITS FROM
GERMAN VISITORS



10,000
ONLINE WALKING
ITINERARIES
DOWNLOADED



190%
INCREASE
FROM DUTCH VISITORS
TO THE WEBSITE



+3,500
APP
DOWNLOADS

Lessons Learned

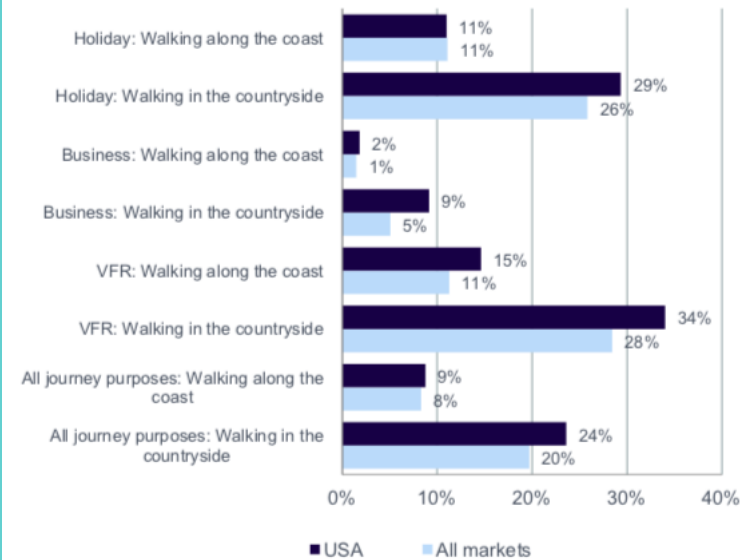
- Press trips & trade shows effective
- Greater segmentation of markets needed
- Tourist businesses support needed for international walking markets
- Commercial partnerships needed to deliver bookable products



National Scale Up

- Across 7 National Trails in England
- Significant marketing research and market segmentation
- National marketing campaign
- Itineraries developed to bookable products for tour operators
- 2019 expansion to US market

Propensity to go for a walk



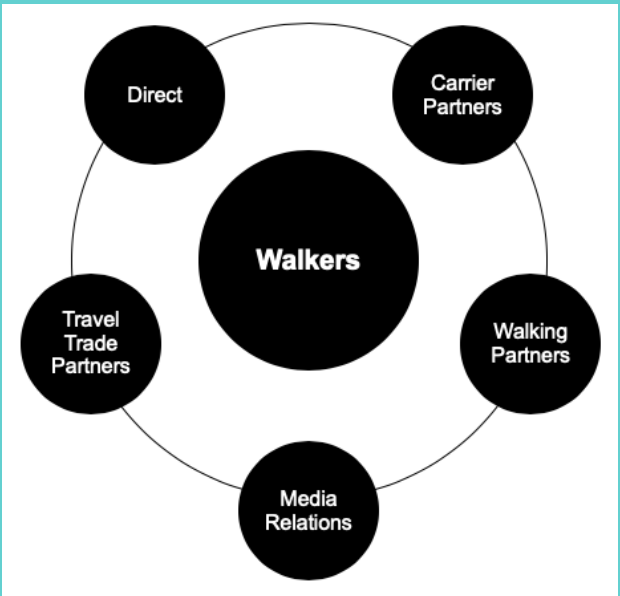
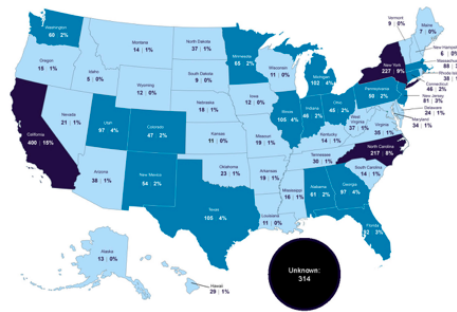
Marketing Strategy Geographic Targeting

USA

As described above, the USA offers significant new opportunities for England's walking product¹. There are however, awareness and product availability challenges to overcome if these opportunities are to be realised.

Our priority in the US will be to:

- Raise awareness of England's National Trail walking product amongst the travel trade and targeted consumer groups.
- Secure additional coverage for England's Great National Trails itineraries in travel trade portfolios.
- Consumer best-prospects are located in the North East and in California^{1,2}. The final decision to choose between these two geographies will be informed by available willing travel trade partners and insight from VisitBritain's appointed media planning and buying agencies.



¹ One Minute to Midnight: England's Great Walking Trails For The American Audience
² VisitEngland/XV Insight DEF Research Summary Report

Demographics

- Targeting **Explorers** and **Adventurers**
- Similar market segments but different characteristics
- Targeted channels to engage segments at the point of choosing a walking holiday

Explorer Segment

- Most likely to be 55+ (58%)
- 52% Female
- Favourite travel activities:
 - Experiencing local food & drink
 - Experiencing rural life & scenery
 - Visiting famous/iconic places
- Unique travel activities:
 - Experiencing rural life & scenery
 - Outdoor leisure pursuits
 - Visiting parks/gardens

Adventurer Segment

- Most likely to be 45+ (67%)
- 53% Male
- Favourite travel activities
 - Experiencing rural life & scenery
 - Experiencing local food & drink
 - Visiting famous/iconic places
 - Exploring history & heritage
- Unique travel activities
 - Outdoor leisure pursuits: long walks, cycling, boating

Segment	Demographics	Characteristics	Travel Activities	Accommodation	Info Sources
Explorers	<ul style="list-style-type: none"> • 55+ 	<ul style="list-style-type: none"> • Comfortable with who they are • Slower relaxed pace • Like to go places that don't attract tourists 	<ul style="list-style-type: none"> • Local food & drink • Rural life & scenery • Famous/iconic places • Outdoor leisure pursuits • Visiting parks & gardens 	<ul style="list-style-type: none"> • B&B • Self-catering 	<ul style="list-style-type: none"> • Friends & family • Movies, books, magazines • Travel agents
Adventurers	<ul style="list-style-type: none"> • 45+ 	<ul style="list-style-type: none"> • Comfortable with who they are • Outdoors in natural landscapes • Off the beaten track • Seek out new experiences 	<ul style="list-style-type: none"> • Local food & drink • Rural life & scenery • Famous/iconic places • History & heritage • Outdoor leisure pursuits 	<ul style="list-style-type: none"> • B&B 	<ul style="list-style-type: none"> • Friends & family • Websites

Business Support

- Tourism business workshops
- Welcoming Walkers programme
- Business web-site with online resources

Market and Trade Profile: Germany

Germany



Business Support England's Great Walking Trails

[HOME](#) [HELP](#) [UPDATES](#) [SUPPLIER DIRECTORY](#)

The American market: motivations for visits & how to welcome them

Almost 3.5 million Americans visited the UK in 2016, which is an increase of 6% compared to the previous year. This makes the USA the second largest source market. 45% of all visits to the UK from the USA were made for holiday purposes. 41% of the American population now have passports and this figure has increased by an average of 6% each year over the past decade, indicating a growing US travelling market.

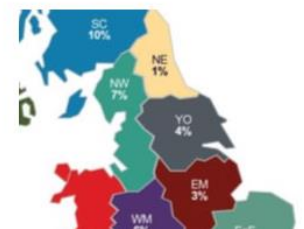
American visitors spent an average of 8 nights per visit in the UK in 2016, longer than the global average. American visitors tend to be older than the average visitor to the UK: 49% of the American visitors were aged 45+ compared to a total average of 39%. California and New York generate the most visits with the 2 states representing almost a quarter of all visits from the USA to the UK. Almost 6 out of 10 American holiday visitors are making a repeat visit.



Get the full report

[Download VisitBritain's American Market Profile](#)
It's packed with useful research and information.

Where do they visit?



Overview of UK visitor statistics in 2016		Change from previous year
Number of visits	3.46 m	5.80%
Total expenditure (GBP)	£3.35 bn	11.42%
Total nights spent	28.39 m	4.24%
Average length of stay (Nights)	8.22	-1.44%
Average spend per visit (GBP)	£971	5.36%

National Campaign

STEP INTO ENGLAND

Cleveland Way

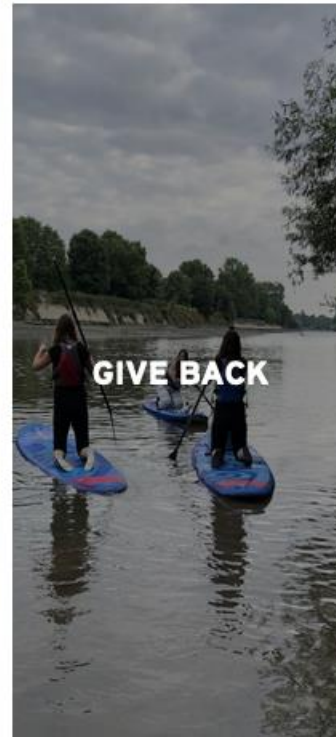
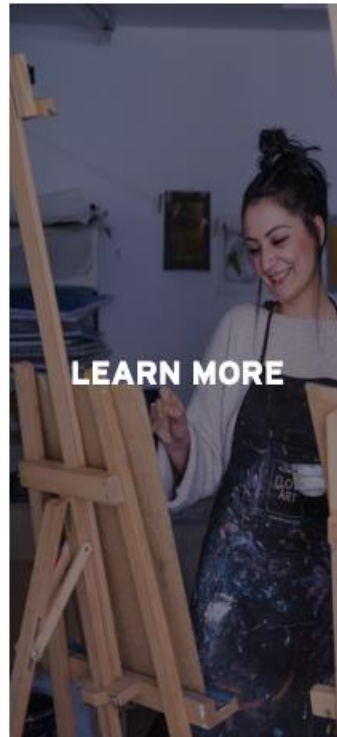
NATIONAL TRAILS





What is a Microgap?

Pack the best bits of a gap year into just a few days with a Microgap in the UK. Whether you like to Switch Off, Give Back, Learn More or Go Wild on your break, a Microgap can provide exactly what you're looking for. Choose your favourite Microgap below to find out more and see where your next trip can take you!



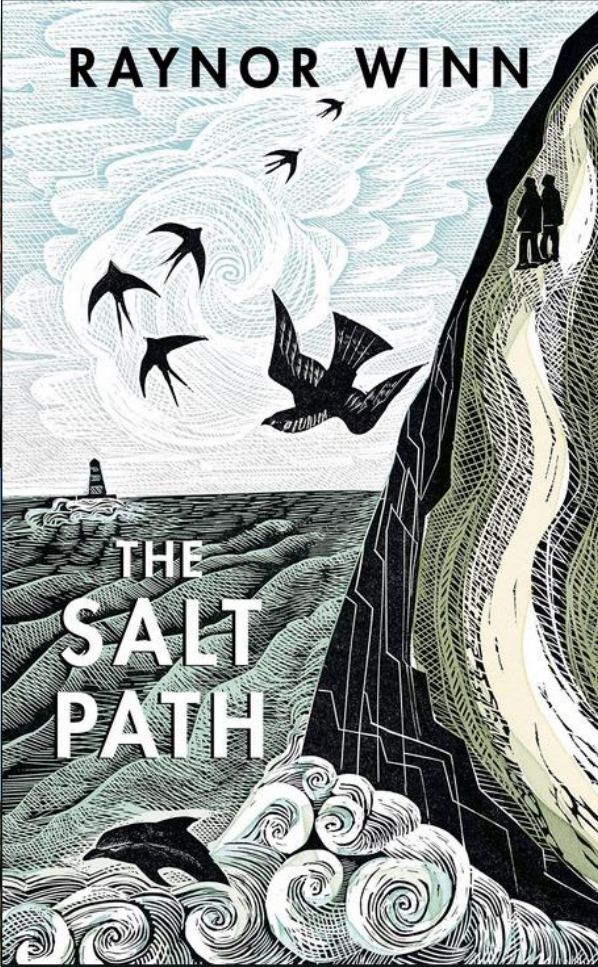


Health & Wellbeing

Access for all – breaking down barriers

Health and wellbeing – identifying and articulating benefits

Creating a sense of place – interpretation, education, engagement



Health & Wellbeing

Disconnect from nature in modern life; increasing obesity; social isolation; financial and social barriers to access



Connecting
Actively to
Nature

Targeting 3,000 inactive people. Identifying barriers. Offering a safe and supported place to walk, building volunteer support and community network



Want fresh air, friends and fun?



You CAN!





Connecting
Actively to
Nature

tackle inactivity amongst people over the age of 55 in Devon
to reach out to people to provide activities, information and
support that will help them make positive changes to their
activity levels now and in the future.





Connecting
Actively to
Nature

- 3 Pilot Projects in 2019
- Over 50 participants in first pilot
- Over 30 participants on each walk
- Additional planning sessions to enable the groups to carry on walking





COUCH TO COAST

Want to be more active? Let's start walking...

Join our series of FREE short walks in and around Teignmouth this summer and we'll help you build up to walking 5 kilometres on the beautiful South West Coast Path National Trail.

For more info and to register visit:
www.southwestcoastpath.org.uk/couch-to-coast
 or drop into the Alice Cross Centre
 in Teignmouth (TQ14 9BT)



Questions?

Get in touch on 01752 896237
 or email Alex alex@southwestcoastpath.org.uk

Meet at 10am
 every other Tuesday

25th June
 9th July
 23rd July
 6th August
 20th August
 3rd September



Photo from: Discover England's Great Walking Trails

Plymouth age UK
 First Meeting:
 Age UK Plymouth Centre
 Top of Broadway Car Park
 PL9 9GH

FREE
 All abilities
 welcome

Includes
 Refreshments
 Transport
 Café stops

Plymstock Coastal Walking Group

Join us for walks along the South West Coast Path exploring South Devon's Area of Outstanding Beauty.

Thursday mornings starting with an introductory meeting on 14th March 2019

Walks taking place on the following dates, at 10:00am

- 28th March
- 11th April
- 9th May
- 25th April
- 23rd May

To find out more go to www.southwestcoastpath.org.uk/CAN
 or call Alex Turner 01752 896237 email alex@southwestcoastpath.org.uk



Connecting Actively to Nature is a Devon Local Nature Partnership programme. To find out more go to www.activedevon.org



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southwestcoastpath.org.uk