

# Environment for Growth Monitoring & Evaluation Project

## EXECUTIVE SUMMARY OF Mid-Term Report by:

Welsh Economy Research Unit  
Cardiff Business School

**For:**  
E4G Steering Group

February 21<sup>st</sup> 2013

### Contact:

02920 875089  
[mundaymc@cf.ac.uk](mailto:mundaymc@cf.ac.uk)  
[rochend@cf.ac.uk](mailto:rochend@cf.ac.uk)

Cardiff Business School  
Colum Drive  
Cardiff  
CF10 3EU, UK

[WWW.WERU.ORG.UK](http://WWW.WERU.ORG.UK)



## INTRODUCTION

This short paper summarises the Mid-Term report findings on the economic impact of the Environment for Growth (E4G) project. The economic impact of both visitor spending (to February 2012) and capital spending (to June 2012 and to project end) are detailed for the E4G project as a whole and for each of the 6 strategic projects where data exists. Economic impacts are reported in terms of gross value added and employment.

**Table 1: Economic Impact Indicators**

<i>Economic Measure</i>	<i>Description</i>
Gross Value Added (GVA)	Locally earned incomes and profits. Reported in £s.
Employment	The number of person years of employment (Full-Time Equivalent FTE) supported by spending associated with visits to E4G sites or events.

Also detailed is the progress to date on underlying WEFO indicators for individual projects at June 2012 (e.g. direct jobs created; visitor numbers; enterprises assisted etc.)

## MAIN FINDINGS

### *Visitor spending economic impact*

- **For each E4G event** an average gross value added of **£19,200** was generated with this supporting around 1 person year of employment in Wales;
- **For each E4G site surveyed** to date an average gross value added of **£1.11m per year** was generated through on-site or directly attributable visitor spending, with this supporting an average of 57 person years of employment in Wales;  
*(Sites surveyed to date have tended to be the relatively large ones in terms of visitor numbers, so the overall average for all initiatives is likely to be less than this)*
- The GVA supported by the whole of trips of which visits to E4G sites were a part levered an average **£4.94m of GVA per year for each site surveyed** and with the underlying tourism consumption supporting 220 person years of employment.

### *Capital spending economic impact*

- **For the E4G project as a whole** the total estimated construction spend at the mid-term stage (June 2012) was an estimated £28.4m. Taking a central assumption that 80% of construction activity is locally sourced, and following multiplier effects, some **£20.5m of value added** is supported in Wales and around **480 person years of employment**;
- To project completion, estimated construction spend associated with the E4G projects is £72.8m. Again, 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, around **£53m of value added** is supported in Wales, and over **1,200 person years of employment**.

## BACKGROUND

Table 2 shows 155 individual initiatives within the E4G project that the research team have data for. We estimate the total spend associated with these initiatives is around £80.8m, of which £35.6m represents ERDF support, and with an average intervention rate of 44%. The average expenditure associated with an E4G initiative is £521,000.

**Table 2: E-flyers returned by Strategic Project**

	<i>Number of E4G initiative eflyers</i>
Coastal Tourism	3
Communities and Nature	67
Heritage Tourism Project	20
Sustainable Tourism	4
Valleys Regional Park	48
Wales Coast Path	13
<b>Total</b>	<b>155</b>

The following sections highlight the economic impact of E4G initiatives for:

- Section A: Impacts of visitor spending for E4G as a whole;
- Section B: Impacts of visitor spending by strategic project;
- Section C: Impacts of capital spending;
- Section D: Overall project progress by overall targets.

## A. IMPACTS OF VISITOR SPENDING

Table A1 summarises the visitor surveys which had been completed and data submitted to the research team by February 2012. These included 15 site surveys, and 11 at specific events.

**Table A1: E4G Visitor Survey Progress (February 2012)**

	<i>Number of questionnaires</i>	<i>Basic analysis complete?</i>	<i>Economic Impact analysis?</i>	<i>Site or Event survey?</i>
<b>COMMUNITIES AND NATURE</b>				
Ystradlyn Cadair Idris 2011	179	Yes	Yes	Site
Cors Dyfi Ospreys 2011	530	Yes	Partial	Site
Moelyci Natural Heritage Open Day 2011	57	Yes	Yes	Event
Great Orme 2011	163	Yes	Yes	Site
	<b>929</b>			
<b>HERITAGE TOURISM PROJECT</b>				
Blaenavon 2011	183	Yes	Yes	Site
Caernarfon 2011	209	Yes	Yes	Site
Caerphilly 2011	223	Yes	Yes	Site
Conwy 2011	226	Yes	Yes	Site
Harlech 2011	207	Yes	Yes	Site
St Davids 2011	199	Yes	Yes	Site
	<b>1,247</b>			
<b>SUSTAINABLE TOURISM</b>				
Halo British Series 2011	95	Yes	Yes	Event
ETAPE Bicycle event 2011	75	Yes	Yes	Event
One Historic Garden Bryngarw Country Park 2011	50	Yes	Yes	Event
	<b>220</b>			
<b>VALLEYS REGIONAL PARK</b>				
Six Bells 2010	138	Yes	Yes	Event
Cordell Event 2010	102	Yes	Yes	Event
Dare Valley 2010	100	Yes	Yes	Site
Pen Y Fan 2010	100	Yes	Yes	Site
Party in the Past 2010	59	Yes	No	Event
Turner Exhibition 2010	40	Yes	No	Event
Welsh Waterways 2011	121	Yes	Yes	Event
Cwmbran Big Event 2011	107	Yes	Yes	Event
The Big V Festival 2011	46	Yes	No	Event
Parc Taf Bargoed 2011	34	Yes	No	Site
Parc Cwm Darran 2011	107	Yes	No	Site
Pen Y Fan 2011	100	Yes	Yes	Site
	<b>1,054</b>			
<b>WALES COAST PATH</b>				
Convergence area, Winter '11	135	Yes	No	Sites
	<b>135</b>			
<b>TOTAL SURVEYS</b> ALL = 26 (Sites = 15; Events = 11)	<b>Questionnaires</b> <b>3,585</b>			

To develop estimates of visitor spending, information gained from the visitor surveys was grossed up to the overall visitor numbers at each site (over a year or season as appropriate for E4G sites and to the total attendance for events). The accuracy of the estimates relies on the representativeness of the surveys collected, with smaller numbers of surveys having to be considered more carefully.

The information on tourism spending at the sites and events provided inputs to an economic model which then generated an estimate of the gross value added and employment connected to the tourist visits.

Table A2 presents an overview of the economic impact associated with visitation to events. Of the 8 events for which complete data was available and analysed an estimated £154,000 was generated in the Welsh economy and with 8 FTE years of employment supported. The total attendance at these events was 22,029.

**Table A2: Economic impact of surveyed E4G events**

	<i>Number of event surveys</i>	<i>Total GVA (£s) generated</i>	<i>Employment (FTEs) supported by event visitor spending</i>	<i>Average GVA (£s) per event</i>	<i>Average employment (FTEs) supported per event</i>
<b>Communities and Nature(CAN)</b>	1	1,210	0.06	1,210	0.06
<b>Heritage Tourism Project (HTP)</b>	0	-	-	-	-
<b>Coastal Tourism (CT)</b>	0	-	-	-	-
<b>Sustainable Tourism (ST)</b>	3	95,165	5.3	31,722	1.8
<b>Valleys Regional Park (VRP)</b>	4	57,300	2.8	14,325	0.7
<b>Wales Coast Path (WCP)</b>	0	-	-	-	-
<b>All E4G</b>	<b>8</b>	<b>153,675</b>	<b>8</b>	<b>19,209</b>	<b>1.0</b>

Table A3 shows the estimated economic impact of visitor spending directly attributable to E4G sites (so that where visitors were on a long stay holiday, just one night's accommodation spend was included along with any other spend directly linked to their trip to the E4G site). The average value added generated for the Welsh economy over one year for each site surveyed was £1.11m, with the visitor spending being connected with an average of 57 person years of employment.

**Table A3: Economic impact of surveyed E4G sites**

	<i>Number of site surveys</i>	<i>GVA (£s) generated</i>	<i>Employment (FTEs) supported by site visitor spending</i>	<i>Average GVA (£s) per site</i>	<i>Average employment (FTEs) supported per site</i>
Communities and Nature(CAN)	3	2,547,000	110	849,000	37
Heritage Tourism Project (HTP)	6	10,472,000	559	1,745,333	93
Coastal Tourism (CT)	0	-	-	-	-
Sustainable Tourism (ST)	0	-	-	-	-
Valleys Regional Park (VRP)	3	353,300	19	117,767	6
Wales Coast Path (WCP)	0	-	-	-	-
<b>All E4G</b>	<b>12</b>	<b>13,372,300</b>	<b>688</b>	<b>1,114,358</b>	<b>57</b>

Table A4 shows that the GVA supported by the whole of trips of which visits to E4G sites were a **part** levered an average of £4.9m of GVA per site. The underlying tourism consumption supported 221 person years of employment.

Clearly there is some possibility of double counting in the total trip figures as visitors to one E4G site may have visited another E4G site. Double counting and displacement issues such as this will be resolved during the monitoring and evaluation of the project as data on visitors' travel patterns in Wales become more robust.

**Table A4: Economic impact of whole trip in Wales of visitors to E4G sites** (includes impact of visitor spending elsewhere on their trip i.e. includes all nights in accommodation)

	<i>Number of site surveys</i>	<i>GVA (£s) generated</i>	<i>Employment (FTEs) supported by site visitor spending</i>	<i>Average GVA (£s) per site</i>	<i>Average employment (FTEs) supported per site</i>
Communities and Nature(CAN)	3	12,271,000	549	4,090,333	183
Heritage Tourism Project (HTP)	6	41,712,000	1,867	6,952,000	311
Coastal Tourism (CT)	0	-	-	-	-
Sustainable Tourism (ST)	0	-	-	-	-
Valleys Regional Park (VRP)	3	5,316,900	231	1,772,300	77
Wales Coast Path (WCP)	0	-	-	-	-
<b>All E4G</b>	<b>12</b>	<b>59,299,900</b>	<b>2,647</b>	<b>4,941,658</b>	<b>221</b>

## B. IMPACTS OF VISITOR SPENDING BY STRATEGIC PROJECT

A summary follows of the economic impact resulting from visitor spending by E4G strategic project where data was available.

### Communities and Nature

Table B1 summarises the economic impact information for Communities and Nature sites. For Ystradllyn Cadair Idris there were an estimated 35,000 visitors in 2010/2011. The survey base was just under 2% of the total number of visitors with 179 surveys covering 603 people. Two-thirds of those surveyed were staying away from home. The GVA associated with the trips of which Ystradllyn was a part was £1.88m (around £54 per visitor), and with this amount of tourism consumption in Wales estimated to support 84 FTE jobs.

The on-site impacts are much smaller reflecting the nature of the site. The GVA attributable to on-site spending was around £0.28m and with this supporting an estimated 15 FTE jobs in Wales directly and indirectly. Table B1 reveals not surprisingly that the Great Orme site levers larger numbers of visitors (over 145,000), but also with a higher proportion of economic impact associated with on site spending. Visitor consumption associated with trips of which Great Orme was a part were associated with an estimated £8.2m of GVA and 370 supported FTE jobs. On site visitor spend contributed £2.3m of GVA and 95 FTEs.

Cors Dyfi Ospreys shares some of the site characteristics of Ystradllyn. Here total trip impacts were estimated at £2.15m of GVA supported and 95 FTE jobs. No on site spending information was available for Cors Dyfi.

The CAN project included one surveyed event to date, the Moelyci Open Day. In the case of events we seek to only estimate the economic impacts associated with the event i.e. this would only include overnights associated with the event itself such that the 'event' is the 'trip'. The impact numbers are much smaller here. The event attracted some 800 visitors. However, there was a GVA impact of £1,210 and with even with the visitor consumption associated with the event directly and indirect supporting 0.06 of an FTE job in Wales.

**Table B1 Communities and Nature Visitor Surveys: Economic Impact**

	Ystradlyn Cadair Idris 2011	Great Orme 2011	Cors Dyfi Ospreys 2011	Moelyci Open Day 2011
Type	Site	Site	Site	Event
Visitor Numbers	35,000	145,183	40,000	800
Date Visitor Numbers relate to	Oct'10-Sep'11	Jan'11-Dec'11	2011 Season	3rd July 2011
Questionnaires completed	179	163	530	57
Number in respondents' parties	603	599	1,513	130
Staying away from home in Wales	65.5%	82.6%	62.2%	7.3%
<b>Economic Impact</b>				
<u>Total Trip</u>				
Gross Value Added	£1,876,000	£8,245,000	£2,150,000	N/A
Supported employment – person-years	84	370	97	N/A
GVA to create each job	£22,333	£22,284	£22,165	N/A
Trips to create job	417	392	412	N/A
Total trip GVA per visitor	£53.60	£56.79	£53.75	N/A
<u>Directly attributable to site/event</u>				
Gross Value Added	£276,000	£2,271,000		£1,210
Employment FTEs	15	95		0.06
GVA to create each job	£18,400	£23,905		£20,167
Visits to create job	2,333	1,528		13,333
On-site GVA per visitor	£7.89	£15.64		£1.51
GVA per visitor: total trip: on-site	6.80	3.63		N/A
GVA to create job: total trip: on-site	1.21	0.93		N/A

*N.B. Visitors to Cors Dyfi Ospreys were not asked for spend data*

In sum CAN initiatives surveyed to date can be connected with tourism trips supporting around £12.4m of GVA in total and supporting over 550 FTE jobs.



## Heritage Tourism Project

Table B2 provides a summary of the economic impact results for Heritage Tourism Project initiatives. These are particularly interesting results because they evidence very different economic effects across similar sites but in different areas of Wales. The castles at Caernarfon and Conwy are among the most visited attractions in Wales. Caernarfon attracted nearly 192,000 visitors in 2009-10. The GVA supported by the whole of trips of which visits to Caernarfon Castle were a part levered a little over £14m of GVA and with the underlying tourism consumption supporting 630 FTE jobs. Around one quarter of the GVA impact was attributable to the site itself in the Caernarfon case i.e. £3.62m and 197 FTE jobs supported directly and indirectly by on-site visitor consumption.

Taken together the HTP sites could be connected to tourism visits in Wales that contributed £41.7m of GVA and that supported 1,867 FTE jobs direct and indirectly. Clearly there is some possibility of double counting in the total trip figures as visitors to one historic site may have visited another HTP site. Double counting and displacement issues such as this will be resolved as data on visitors' travel patterns in Wales become more robust.

**Table B2 Heritage Tourism Project Visitor Surveys : Economic Impact**

	Blaenafon	Caernarfon	Caerphilly	Conwy	Harlech	St Davids	Site Average
Type	Site	Site	Site	Site	Site	Site	Site
Visitors Oct 2009- Sept 2009	28,085	191,871	84,631	177,411	93,624	26,165	100,298
Questionnaires completed	183	209	223	226	207	199	208
Number in respondents' parties	598	829	735	803	835	686	748
Staying away from home in Wales	53.0%	88.0%	57.8%	82.7%	91.8%	92.5%	77.6%
<b>Economic Impact</b>							
<u>Total Trip</u>							
Gross Value Added	£1,643,000	£14,029,000	£4,433,000	£12,622,000	£6,799,000	£2,186,000	£6,952,000
Supported employment – p/y	73	630	199	565	305	95	311
GVA to create each job	£22,507	£22,268	£22,276	£22,340	£22,292	£23,011	£22,449
Trips to create job	385	305	425	314	307	275	335
Total trip GVA per visitor	£58.50	£73.12	£52.38	£71.15	£72.62	£83.55	£69.31
<u>Directly attributable to site</u>							
Gross Value Added	£263,000	£3,618,000	£1,230,000	£3,317,000	£1,347,000	£697,000	£1,745,333
Employment FTEs	14	197	63	180	70	35	93
GVA to create each job	18,786	18,365	19,524	18,428	19,243	19,914	£19,043
Visits to create job	2,006	974	1,343	986	1,337	748	1,232
On-site GVA per visitor	£9.36	£18.86	£14.53	£18.70	£14.39	£26.64	£17.40
GVA per visitor: total trip: on-site	6.25	3.88	3.60	3.81	5.05	3.14	3.98
GVA to create job: total trip: on-site	1.20	1.21	1.14	1.21	1.16	1.16	1.18

The GVA attributable to on-site spending across the six HTP projects was £10.5m and with the underlying tourism spending at the sites supporting an estimated 559 FTE jobs.

Table B2 reveals marked differences in the on-site GVA supported per visitor. This varied from £9.36 in the case of Blaenavon to £26.64 in the case of St Davids. These figures testify to the different spending opportunities available at sites and subtle differences in the visitor mix at each site. Finally here the information in Table B2 shows that care is required in generalising economic impact based on visitor numbers alone with GVA and employment effects per visitor showing marked variation.

### Sustainable Tourism

Table B3 reveals economic impacts associated with Sustainable Tourism events. Here the focus is on economic activity supported by the event.

**Table B3 Sustainable Tourism Visitor Surveys : Economic Impact**

	ETAPE Cycling event 2011	HALO British Series Cycling event 2011	One Historic Garden, Bryngarw Country Park "Shakespeare, Songs & Silliness" 2011
Type	Event	Event	Event
Visitor Numbers	1,000	2,310	175
Date Visitor Numbers relate to	8/9th Oct'11	25/26th Jun'11	26-28th Jul'11
Questionnaires completed	75	95	50
Number in respondents' parties	236	288	154
Staying away from home in Wales	36.1%	91.1%	0.0%
<b>Economic Impact</b>			
<u>Total Trip</u>			
Gross Value Added	N/A	N/A	N/A
Supported employment - FTE	N/A	N/A	N/A
GVA to create each job	N/A	N/A	N/A
Trips to create job	N/A	N/A	N/A
Total trip GVA per visitor	N/A	N/A	N/A
<u>Directly attributable to event</u>			
Gross Value Added	£23,040	£71,800	£325
Employment FTEs	1.24	4	0.02
GVA to create each job	£18,581	£17,950	£16,250
Visits to create job	806	578	8,750
On-site GVA per visitor	£23.04	£31.08	£1.86
GVA per visitor: total trip: on-site	N/A	N/A	N/A
GVA to create job- total trip: on-site	N/A	N/A	N/A

In each case here the number of survey returns represented a relatively large proportion of total visits. For example the ETAPE cycling event surveys completed covered 23.6% of the event visitor numbers. Compared to strategic sites economic impact numbers are smaller but with the figures typically representing just a few days of activity as opposed to a season or year.

The ETAPE event for 8/9<sup>th</sup> October 2011 attracted around 1,000 visitors. Tourism spending levered by the event supported just over £23,000 of GVA and with the underlying spending supporting just over 1 FTE job. The Halo Cycling event attracted an estimated 2,310 visitors and featured a relatively high amount of staying visitation. Visitor spending associated with the event is estimated to have supported £71,800 of GVA and supported 4 FTE jobs directly and indirectly. The event at the One Historic Garden initiative in Bryngarw was smaller scale but with some GVA and employment supported by spending at the event by 175 visitors.

### **Valleys Regional Park**

Table B4 summarises economic effects associated with Valleys Regional Park sites and events. Dare Valley was estimated to have received 142,000 visitors between October 2009 and September 2010. The GVA supported by trips of which Dare Valley was a part was around £4.4m and with linked tourism spending supporting an estimated 190 FTE jobs. In the case of Dare Valley, on-site effects were a small proportion of total trip effects. Just £0.28m of GVA was supported by the on-site spending and 15 FTE jobs. The remaining site is Pen y Fan where survey results were available for 2010 and 2011. For the two years there are similarities in the GVA and employment supported by trips of which visit to Pen y Fan were a part. In 2011 an estimated £0.51m of GVA was supported and 22 FTE jobs. However, economic activity supported by on site spending differed markedly between 2010 and 2011. It is noted that in the case of Pen y Fan survey returns represent a small element of the visitor population and with results here possibly sensitive to just a few returns.

Finally Table B4 summarises economic effects associated with four Valley Regional Park events. Taken together the four events supported £57,000 of GVA and with underlying spending directly and indirectly supporting just under 3 FTE jobs.

**Table B4 Valleys Regional Park Visitor Surveys : Economic Impact**

	Dare Valley 2010	Pen Y Fan 2010	Pen Y Fan 2011	Six Bells Event 2010	Cordell Event 2010	Welsh Waterways 2011	Cwmbran Big Event 2011	Event Average
Type	Site	Site	Site	Event	Event	Event	Event	Event
Visitor Numbers	142,000	80,000	81,000	7,500	1,568	1,676	7,000	4,436
Date	Oct'09- Sep'10	Jan'10- Dec'10	Nov'10- Oct'11	28th Jun'10	18/19th Sep'10	28-30th May'11	16th Jul'11	
Questionnaires completed	100	100	100	138	102	121	107	117
Number in respondents' parties	332	261	244	424	502	355	405	422
Staying away from home in Wales	33.0%	1.0%	1.0%	13.5%	4.9%	14.0%	1.9%	8.6%
<b>Economic Impact</b>								
<u>Total Trip</u>								
Gross Value Added	£4,367,000	£435,900	£514,000	N/A	N/A	N/A	N/A	N/A
Supported employment - FTE	190	19	22	N/A	N/A	N/A	N/A	N/A
GVA to create each job	£22,984	£22,942	£23,364	N/A	N/A	N/A	N/A	N/A
Trips to create job	747	4,211	3,682	N/A	N/A	N/A	N/A	N/A
Total trip GVA per visitor	£30.75	£5.45	£6.35	N/A	N/A	N/A	N/A	N/A
<u>Directly attributable to event</u>								
Gross Value Added	£280,000	£54,500	£18,800	£32,000	£3,350	£5,950	£16,000	£14,325
Employment FTEs	15	3	1	1.5	0.16	0.27	0.9	0.7
GVA to create each job	£18,667	£18,167	£18,800	£21,333	£20,938	£22,037	£17,778	£20,521
Visits to create job	9,467	26,667	81,000	5,000	9,800	6,207	7,778	7,196
On-site GVA per visitor	£1.97	£0.68	£0.23	£4.27	£2.14	£3.55	£2.29	£3.06
GVA per visitor: total trip: on-site	15.60	8.00	27.34	N/A	N/A	N/A	N/A	N/A
GVA to create job: total trip: on-site	1.23	1.26	1.24	N/A	N/A	N/A	N/A	N/A

### C. Impacts of capital spending

As well as impacts in terms of leveraging tourism spending it is important to recognise that the Environment for Growth programme has also involved considerable amounts of capital spending, in large measure, on construction type activity. Within the Welsh European Funding Office guidelines the direct and indirect economic activity supported through capital spending cannot be included within any gross or new jobs created target. However, estimates of output and employment supported during E4G developmental activity should be included in a more general evaluation of the programmes 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, we would argue that on the basis of prior projects evaluated by the Cardiff University team involving environmental assets, 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 E4G project from inception to June 2012. 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 E4G projects at the mid-term stage (June 2012) was an estimated £28.4m. 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 £20.5m of value added is supported in Wales and around 480 person years of employment.

Put another way if the construction activity bridged a period of three years, the E4G spending would have supported around 165 construction jobs and jobs in the construction supply chain over this three year period, and around £7m of value added per annum. However, the table also reveals that if the local sourcing of the construction industry inputs averaged just 60% then a total of around £15m of value would have been supported and around 350 person years of employment.

The table also subdivides estimated value added and job years supported between the strategic strands of the E4G project. Capital spend associated with the Valleys Regional Park project accounts for around one third of the direct and indirect effects at the mid-term stage.

**Table C1 Estimated Value Added and Employment Supported by E4G Capital Spending to June 2012, and to Project Completion**

Project and Local sourcing assumption	Mid Term Stage		At Project Completion	
	Value Added (£m)	Approx Employment (FTE person years)*	Value Added (£m)	Approx Employment (FTE person years)*
<b>Sustainable Tourism</b>	<i>To June 2012 (£2.743m)</i>		<i>Whole project (£14.232m)</i>	
100%	2.5	60	12.9	300
80%	2.0	45	10.3	240
60%	1.5	35	7.7	180
<b>Coastal Tourism</b>	<i>To June 2012 (£4.600m)</i>		<i>Whole project (£13.949m)</i>	
100%	4.1	100	12.5	300
80%	3.3	80	10.0	240
60%	2.5	60	7.6	180
<b>Heritage Tourism Project</b>	<i>To June 2012 (£4.889m)</i>		<i>Whole project (£15.227m)</i>	
100%	4.4	105	13.7	320
80%	3.5	85	11.0	260
60%	2.6	60	8.2	190
<b>Communities and Nature</b>	<i>To June 2012 (£2.944m)</i>		<i>Whole project (£8.997m)</i>	
100%	2.7	60	8.2	185
80%	2.1	50	6.5	150
60%	1.6	35	4.9	110
<b>Wales Coast Path</b>	<i>To June 2012 (£4.009m)</i>		<i>Whole project (£6.216m)</i>	
100%	3.6	85	5.6	130
80%	2.9	65	4.5	100
60%	2.2	50	3.4	80
<b>Valleys Regional Park</b>	<i>To June 2012 (£9.218m)</i>		<i>Whole project (£14.200m)</i>	
100%	8.3	195	12.8	300
80%	6.7	155	10.3	240
60%	5.0	110	7.7	175
<b>Total</b>	<i>To June 2012 (£28.403m)</i>		<i>Whole project (£72.821m)</i>	
100%	<b>25.6</b>	<b>605</b>	<b>65.7</b>	<b>1535</b>
80%	<b>20.5</b>	<b>480</b>	<b>52.6</b>	<b>1230</b>
60%	<b>15.4</b>	<b>350</b>	<b>39.5</b>	<b>915</b>

\*Note. The employment estimate numbers have been rounded to the nearest 5.

Table C1 also indicates that, to project completion, estimated construction spend associated with the E4G projects is £72.8m. Again, 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, around £53m of value added is supported in Wales, and over 1,200 person years of employment. We stress these are estimated numbers, but they do reveal that as well as leveraging tourist spending, the development activity connected to E4G may also have important employment effects.

#### **D. Overall Project Target Progress**

For completeness, Table D1 provides information on the overall progress of the E4G strands of activity against the targets that were agreed with WEFO on project inception. Progress on some of the key targets has been disappointing but it has to be accepted that projects are at different stages, although the overall E4G project is at mid-term stage.

In general progress on job created has been poor at the mid-term stage across all strands i.e. less than 25 jobs reported as created against a target of close to 350. Notwithstanding this direct jobs created target does not include employment supported by visitor spend and during the development phases of construction. In this respect progress on levered visitation has been much stronger across all of the six strands with two strands already well exceeding their visitor targets, and a further two expected to do so by the end of the E4G project.

Progress has also been poor in terms of enterprises assisted and created, although an evidence base is being developed to provide better evidence on this measure.

Progress on managed access in terms of kilometres developed has also been variable. Valleys Regional Park seems well on schedule to exceed its managed access target. It is unclear why with respect to the Welsh Coastal Path that the delivery of the path is reported as completed but that no total is reported against km of managed access. Coastal Tourism and Sustainable Tourism are at earlier stages but with some way to go to meet targets on amounts of managed access achieved.

Our conclusion from table D1 would be selected strands of the E4G programme are unlikely to meet all of their targets, and with some questions on whether the original targets developed are suitable given the difficulty of collating appropriate evidence.

**Table D1 Overall Project Target Progress**

<b>Sustainable Tourism</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	53	4.66	48
Visitor Numbers	917,187	396,255	520,932
Enterprises Assisted	55	7	48
Initiatives developing, urban, natural or historic environment	13	1	12
Managed access to the Coast or Countryside (km)	428.00	81.9	346
<b>Coastal Tourism</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	44	8.5	35.5
Visitor Numbers	406,380	243,534	162,846
Enterprises Assisted	21	0	21
Initiatives developing, urban, natural or historic environment	33	6	27
Managed access to the Coast or Countryside (km)	25.775	1.5	24.275
<b>Heritage Tourism Project *</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	18	0.7	17.3
Visitor Numbers	210,000	160,928	49,072
Enterprises Assisted	0	0	0
Initiatives developing, urban, natural or historic environment	18	4	14
Managed access to the Coast or Countryside (km)	0	0	0
<b>Communities and Nature</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	20	2	18
Visitor Numbers	100,000	694,743	exceeded
Enterprises Assisted/ <u>Created</u>	3	1	2
Initiatives developing, urban, natural or historic environment	20	67	exceeded
Managed access to the Coast or Countryside (km)	10	133	exceeded
<b>Wales Coast Path</b>			
<i>OUTPUT</i>	<i>TARGET</i>	<i>ACTUAL</i>	<i>REMAINING</i>
Jobs Created- Direct	8		
Visitor Numbers	100,000		
Enterprises Assisted	2		
Initiatives developing, urban, natural or historic environment	Delivery of the all Wales Coast Path	completed	
Managed access to the Coast or Countryside (km)	15		



<b>Valleys Regional Park</b>			
<i><b>OUTPUT</b></i>	<i><b>TARGET</b></i>	<i><b>ACTUAL</b></i>	<i><b>REMAINING</b></i>
Jobs Created- Direct	200	7	193
Visitor Numbers	100,000	580,000	exceeded
Enterprises Assisted	NA	NA	NA
Initiatives developing, urban, natural or historic environment	6	8	exceeded
Managed access to the Coast or Countryside (km)	80	72	8
Participants in training	200	263	exceeded
Qualifications	150	169	exceeded

\* Note: HTP figures reflect OE September 2012 claim (Strata Florida, Conwy Castle, Denbigh Castle and Copper Kingdom Heritage Centre, Amlwch (Mona Antiqua)).