



COASTAL COMMUNITIES FUND

ANNUAL PROGRESS
REPORT 2016



Delivered by Big Lottery Fund on behalf of UK Government and the Devolved Administrations in Northern Ireland, Scotland and Wales



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FRONT PAGE PHOTO

A celebratory event for the opening of the Pembrey-Kidwelly walking and cycling path, a project delivered by Sustrans in partnership with Carmarthenshire County Council with their £299,364 CCF award.

FRONT PAGE PHOTO

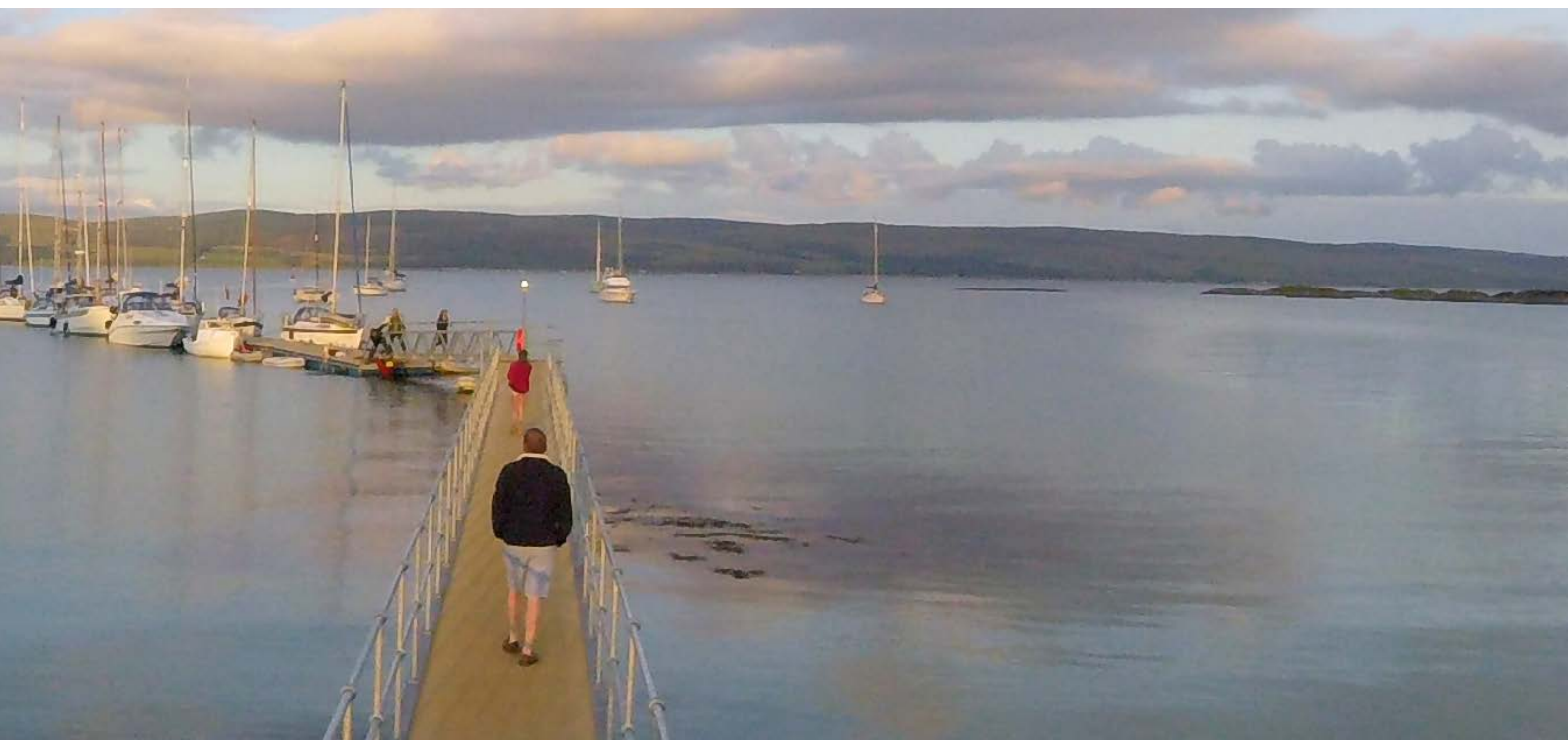
The inaugural Arran Coastal Trail Run 2016, inspired by The Arran Access Trust's £278,713 CCF project that has enhanced the Arran Coastal Way.

FRONT PAGE PHOTO

Stunning summer heather and gorse around South Stack cliffs on the west coast of Anglesey, where RSPB Cymru are using their £267,843 CCF award to develop the existing visitor facilities and improve the tourism experience.

BELOW:

Gigha trading Ltd's £370,925 CCF award has funded the installation of a new jetty and improved moorings, leading to an increase in visitor numbers and tangible benefits for local businesses.



FRONT PAGE PHOTO

A puffin sighted off of Bempton Cliffs, where RSPB have received a £452,784 CCF award to enhance the Seabird Discovery Centre and create a year-round attraction to further promote wildlife conservation. Photo: Pete Hewitt

FRONT PAGE PHOTO

Harvesting at Ocean Veg Ireland Ltd's kelp laboratory on Rathlin Island, which they have established with their £71,844 award.



COASTAL COMMUNITIES FUND

MINISTERIAL FOREWORD

The Great British and Northern Ireland Coast plays a vital role in the history, heritage and culture of our country. This Government is committed to helping coastal communities flourish and strengthen their appeal as places to live, work and visit.

The Coastal Communities Fund provides a targeted source of help to seaside towns. This has allowed it to support many exciting and innovative projects that support jobs and growth in coastal areas but which don't always satisfy the funding criteria of other often much larger funding programmes. The Fund is an important part of the Government's wider efforts to promote local growth and to create an economy that works for everyone. This third progress report describes the Fund's impressive achievements across the UK since its launch in 2012. It shows the varied ways our coastal communities have risen to the challenges they face, transforming and diversifying their economies, whilst promoting their traditional assets.

Furthermore, the report shows that the achievements of the Fund are creating a momentum - attracting high quality projects that are bringing real and sustainable benefits to coastal communities throughout the UK. From Amble to Anglesey, Rathlin Island to Kilkeel, and from Brighton to Bute, more than 200 projects have been awarded grants which are predicted to safeguard or create up to 18,000 new jobs and attract over £200 million in co-funding.

Coastal tourism has regained its position as England's largest holiday sector and is now worth £8 billion annually. With one third of all domestic overnight trips to the coast there is huge potential for our Great British and Northern Ireland Coast to thrive all year round.

The extension of the Coastal Communities Fund for another four years to 2020-21 with at least £90 million available, and the creation of 146 Coastal Community Teams in England will help seaside towns and coastal areas achieve even more success in the years ahead.

I hope you enjoy reading about the Fund's considerable achievements so far, and the commitment and endeavour that lies behind them.

Andrew Percy MP

Parliamentary Under Secretary of State
(Minister for the Northern Powerhouse)

INTRODUCTION

The Coastal Communities Fund (CCF) aims to support the economic development of coastal communities by promoting sustainable economic growth and jobs, so that people are better able to respond to the changing economic needs and opportunities of their area. This is the third annual progress report for CCF, taking a cumulative look back at the progress funded projects have made across three rounds of funding since the start of the programme in 2012. It reflects on what has been achieved so far and the contribution of CCF projects to the revival of coastal communities around the UK.

COASTAL COMMUNITIES FUND

AN EVOLVING APPROACH

The Coastal Communities Fund seeks to encourage economic development of coastal communities by providing funding to create sustainable economic growth and jobs. It focuses on a single outcome that 'coastal communities will experience regeneration and economic growth through projects that directly or indirectly create sustainable jobs, and safeguard existing jobs'. The Big Lottery Fund delivers the programme across the UK on behalf of UK Government and the Devolved Administrations in Northern Ireland, Scotland and Wales. To date, CCF has invested over £120 million in over 200 projects across the UK.

Until the launch of the CCF in 2012, there had not been a single UK-wide response to economic, social and environmental needs and opportunities in coastal towns and communities, largely due to their diversity. The programme has arguably been catalytic in developing interest and activity in coastal towns and communities, and since 2012 each of the four nations has developed its own distinct approach to their future development and growth. This is evident in the CCF Round 4 priorities, which will guide the delivery of the programme from 2017.

Each of the four nations has developed different approaches, which extend beyond the CCF and reflect wider policy perspectives. For example, England are strengthening the focus on coastal towns and communities through the introduction of the 145 Coastal Community Teams (CCTs), which bring together local communities, their local authority and local businesses to help support jobs, growth and prosperity.² In the other nations, broader policy has shaped CCF Round 4 priorities as set out in figure 1.0. One of the strengths of CCF then has been its ability to reflect local and national priorities within a UK-wide framework.

¹ Coastal Tourism 2016 – National Coastal Tourism Academy 2016

² For further information see: <https://www.gov.uk/government/news/coastal-community-teams-to-take-control-of-seaside-regeneration>; <https://www.gov.uk/government/news/new-coastal-revival-fund-and-community-teams-to-bring-jobs-and-businesses-to-seaside-towns>

Figure 1.0 CCF Round 4 : A Bespoke Approach

ENGLAND	
Funding priorities / Key Themes	Economic diversification and innovation
	Business development support
	Addressing seasonality
	Improvements to public places
	Integrated regeneration
	Coastal Community Teams now eligible to apply
<hr/>	
Geography	No limitations
<hr/>	
Funding	Over £50,000 / No upper limits
<hr/>	
WALES	
Funding priorities / Key Themes	New area of activity or business
	Expand the delivery of existing activities or business
	Innovate or improve their business model or organisational structure
<hr/>	
Geography	No limitations
<hr/>	
Funding	Over £50,000 / Up to £300,000
<hr/>	
SCOTLAND	
Funding priorities / Key Themes	Local Development Strategies under European and Maritime Fisheries Fund
	Scottish Tourism Strategy
	Strategic regeneration
<hr/>	
Geography	Around 60,000 population or less
<hr/>	
Funding	Over £50,000 / Up to £300,000
<hr/>	
NORTHERN IRELAND	
Funding priorities / Key Themes	Regeneration that supports investment in tourism, business, built and natural environment
	Training and skills linked to long term job security
<hr/>	
Geography	Around 60,000 population or less
<hr/>	
Funding	Over £50,000 / Up to £100,000

COASTAL COMMUNITIES FUND

COASTAL TOWNS AND COMMUNITIES

While acknowledging the diversity of the UK's coastal towns and communities, CCF has sought to address some common challenges that often characterise coastal communities. These include:



Over dependence on seasonal, lower paid jobs in a small range of industries such as tourism and hospitality



Declining and ageing populations



Narrow housing stock challenges for local population to access and/or afford appropriate housing



Distance from markets and services with poor transport connectivity



A range of physical and environmental challenges

Our coastal communities have shown great resilience though, diversifying and transforming their local economies in recent years. CCF has played a significant role by supporting funded projects to make the most of the people and assets in their local community and attracting over £170m of additional investment. For example, there has been a significant turnaround in the number of people taking 'staycations', with numbers of seaside trips increasing from around 18 million in 2010 to 23 million in 2014 – an increase of over 25%.³ The seaside offer in terms of accommodation, eating out and things to see and do has improved, with much of this being reported in the popular press and helping to underscore the attractions of a UK seaside holiday.

It is not just in traditional markets that hope for the future lies either. The Centre for Entrepreneurs has highlighted that there are plenty of real reasons for optimism:

“New industries are replacing the old; technology is reconnecting these often marginalised communities and, at the same time, stemming the brain drain. A pioneering generation of entrepreneurs, investors, cultural institutions and local politicians are finding fresh relevance for these towns, harnessing their natural and architectural beauty in novel and imaginative ways”.⁴

— Centre for Entrepreneurs

³ Source: GB Tourist Statistics, Visit Britain.

⁴ Source: How Entrepreneurs can turn the tide in seaside Towns, Centre for Entrepreneurs 2015



TOP & MIDDLE: The South West Coastal Path Association have used their £1,146,684 award to repair, improve and promote the beautiful South West Coastal Path following damage during the winter of 2013/14.



BOTTOM: RSPB Cymru are using their £267,843 CCF award to develop the existing visitor facilities and improve the tourism experience at South Stack cliffs on the west coast of Anglesey.

COASTAL COMMUNITIES FUND

INVESTMENT TO DATE

The total value of CCF awards is currently around £125 million, which has supported projects with a total value of £294 million. That means that CCF has generated or complemented co-funding of £172 million – with every £1 of CCF funding attracting £1.4 of funds from other sources. The analysis in this report is based on cumulative data across funding rounds one, two and three up to April 2016.

Every £1 of CCF funding attracts £1.4 of funds from other sources.

The majority of awards both in terms of number and value have been in England which accounted for 74% of total CCF investment. At a regional level, the South (West and East) accounted for around half of all England investment. Scotland accounted for 17% of investment with Wales and Northern Ireland 7% and 2% respectively.

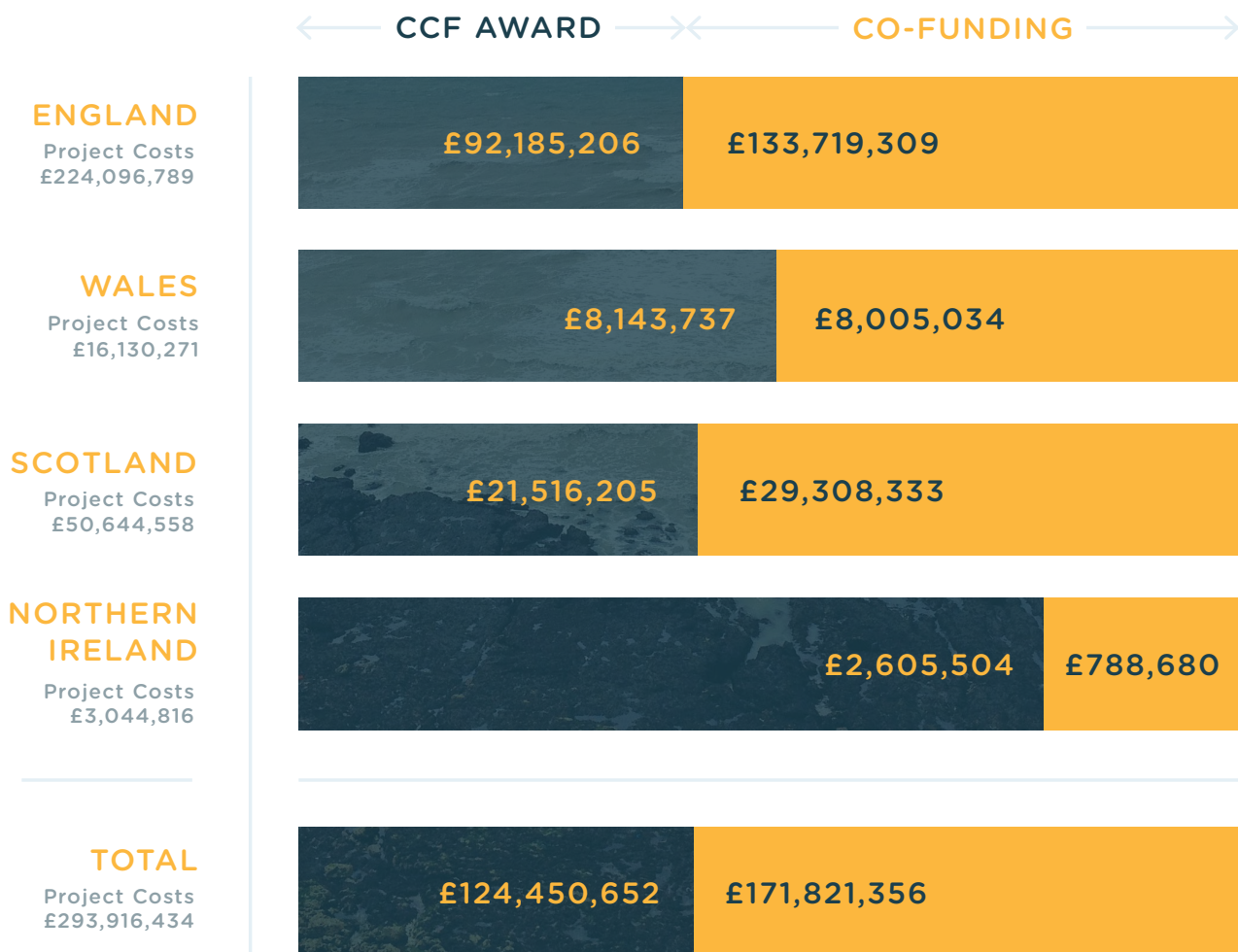


Figure 2.0 Investment Activity

Figure 3.0 Locational Activity

The average award value has been around £570,000 but with a significant difference between England (significantly higher) and the rest of the UK (significantly lower).

Nation	No of awards	% of awards	Value	% by value	Average value
England	98	45%	£92,185,206	74%	£940,665
East of England	14	14%	£8,624,382	9%	£616,027
East Midlands	2	2%	£1,950,000	2%	£975,000
North East	12	12%	£15,423,562	17%	£1,285,297
North West	12	12%	£8,872,038	10%	£739,337
South East	19	19%	£20,583,732	22%	£1,083,354
South West	28	29%	£24,681,227	27%	£881,472
Yorkshire & Humber	11	11%	£12,050,265	13%	£1,095,479
Wales	39	18%	£8,143,737	7%	£208,814
Scotland	71	32%	£21,516,205	17%	£303,045
Highland & Islands	39	18%	£12,365,655	10%	£317,068
Rest of Scotland	32	14%	£9,150,550	7%	£285,955
Northern Ireland	11	5%	£2,605,504	2%	£236,864
TOTAL	219	100%	£124,450,652	100%	£568,268

COASTAL COMMUNITIES FUND

EMPLOYMENT OUTPUTS

Figure 4.0 Employment Outputs⁵



CCF funded projects are forecast to create or safeguard over 18,000 jobs, of which over 7,000 have already been achieved. 78% of the jobs already created are located in England, thus reflecting the proportionate share of investment.

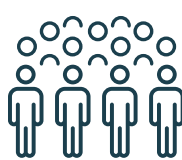
The average cost per forecast created job is £6,700 which is good value for money from a public sector perspective.

⁵ These figures include direct, indirect and safeguarded jobs.

In addition to the headline employment creation, CCF projects have also delivered a range of other outputs. They are forecast to:



Support over 10,000 SMEs and 1,300 new business starts



Increase visitor numbers by over 8 million and generate visitor spend of over £360 million



Create over 1,300 apprenticeships



Create 84,000² metres of new or upgraded floorspace

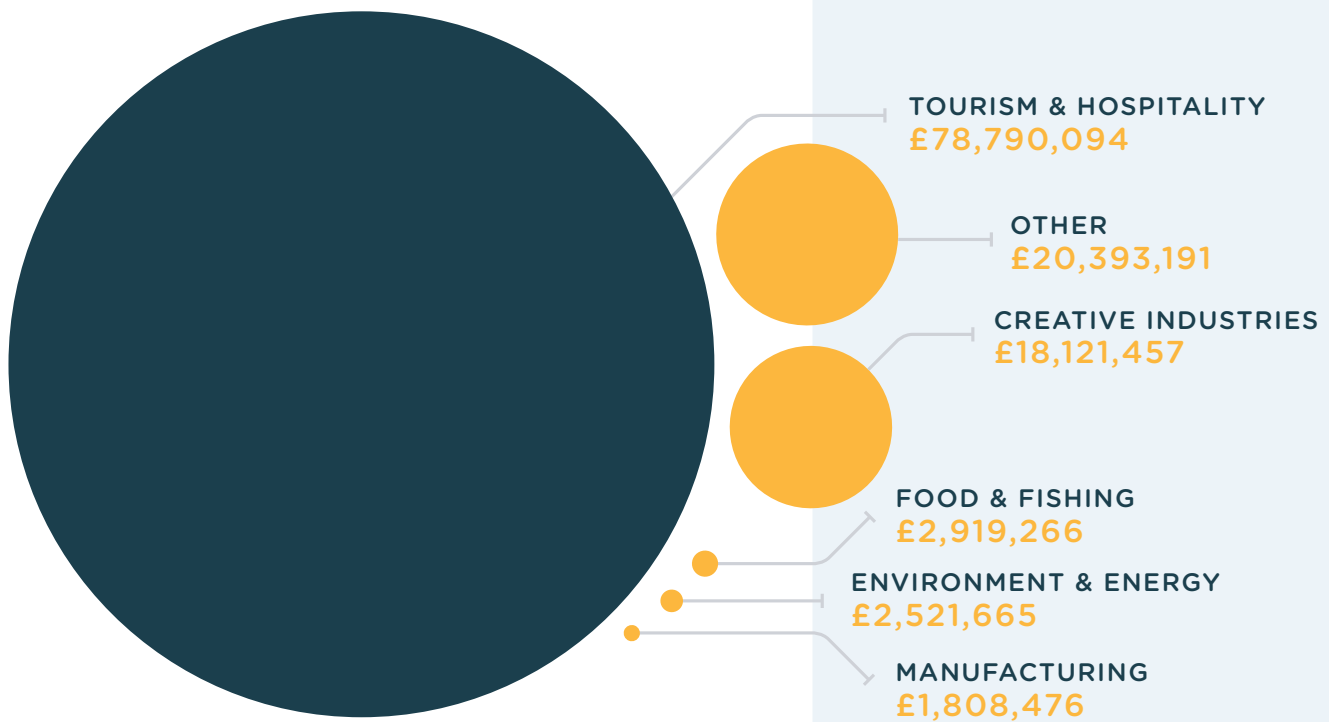
Figure 5.0 Output Activity

	Output indicator	Forecast Numbers (Verified)	Actual to Date
Business	Private businesses supported	10,936	7,295
	Increase in business sales (£m)	135,535,080	31,845,451
	New business starts supported	1,302	485
	Social enterprise supported	415	181
Tourism	Increase in visitor numbers (m)	8,079,585	2,100,964
	New visitor expenditure (£m)	363,029,913	171,464,285
	New tourism facilities created	258	139
	Tourism events supported	1,701	485
	New marina berths created	326	107
Skills & Training	Apprenticeships created	1,342	978
	Trainees gaining employment	1,718	420
	Trainees gaining qualification	2,387	2,050
Physical	Brownfield land remediated (Ha)	136	21
	New or upgraded floorspace (Sq Mts)	84,013	41,230
	Public realm created/improved (Sq Mts)	344,874	294,134
	Physical projects supported	298	349
Community	Volunteer places	1,471	1,407
	Community projects supported	990	641

COASTAL COMMUNITIES FUND ACTIVITY BY SECTOR

Figure 6.0 Sector Activity

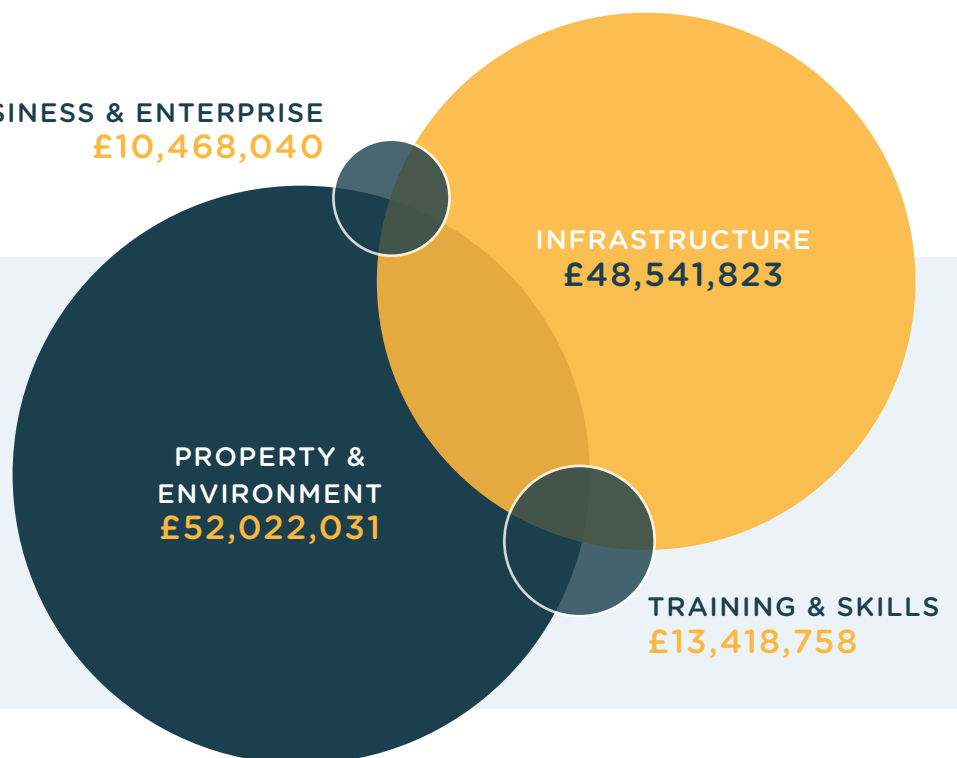
Unsurprisingly, the majority of awards - over 60% by number and value - have supported tourism and hospitality projects, which reflects the key economic activity in many coastal towns. The only other sector where there has been major spend is in creative and cultural industries (16% by value) with other sectors accounting for very small percentages.



BUSINESS & ENTERPRISE
£10,468,040

Figure 7.0 Thematic Activity

The largest number of awards were in support of infrastructure or property related projects which account for 70% of all awards and around 80% by value, reflecting the cost element associated with large capital projects. There was also a good spread of projects in support of the business and skills priorities of CCF.





THIS PAGE: Yorkshire Wildlife Trust are using their £498,573 CCF award to address seasonality within the local tourism sector by promoting the area around Spurn Point, East Riding as a destination for nature tourism – the project includes the restoration of the iconic Grade II Listed 'Matthew's Lighthouse'.

PHOTO: George Stoyale



THEMATIC HIGHLIGHTS

MARINE TOURISM



PHOTO: Three harbours – Coastal rowing at the Cullen Sea School.

Marine Tourism includes recreational activities which involve travel away from home and have the marine environment – coastal, offshore or inland waters/waterways as their host or focus. It includes adventure, wildlife, family boating and a variety of water sports activities, day or extended visits. A recent report⁶ describes marine tourism as follows:

Established	Core	Emerging	Other
Cruising Sea angling Marine wildlife watching Day Boat Trips	Sailing (yacht and dingy) Motor-boating	Sea kayaking Coastal Rowing Surfing Windsurfing	Canal boats SCUBA diving Water-skiing Kite-surfing

It is difficult to identify a robust figure for marine tourism's economic value to the UK economy due to different data sources using different assumptions. However, the following give some indication of its value:

- ➔ Marine tourism in Scotland is estimated to be worth **£1.3 billion** in terms of specialist activities including wildlife watching, sailing, kayaking, surfing and angling⁷.
- ➔ The Welsh Government's recently published Marine Evidence Report estimates the value of economic activity in the maritime economy in Wales at around **£2.1bn**⁸
- ➔ The UK marine economy generates direct and indirect revenues of over **£3.2 billion** and contributes over **£6.2 billion** in gross value added to UK GDP⁹
- ➔ Overall, approximately 5 million domestic holidays were taken in 2014 that involved a boating activity, contributing **£1.7 billion** to the UK economy¹⁰.

This suggests that UK-wide marine tourism may have a value of £4/5 billion per annum – a major part of the tourism mix.

Many CCF projects, while not exclusively focussing on marine tourism, will contribute to its growth e.g. harbour improvements or businesses offering boat trips. One key aspect of marine tourism is the provision of new marina berths.

To date, CCF has supported the provision of over 300 new berths with an investment of around £3 million.

CCF projects have demonstrated how capital improvements like this can transform a local community. The Three Harbours Association was awarded £510,311 to create a water sports hub and boat building facility on a derelict site in Moray. The new facility employs 3.5 FTE staff and has provided training opportunities for 25 people. The project supports economic diversification in the former fishing communities of Cullen, Findochty and Portknockie, and promotes community cohesion by encouraging participation in activities like traditional boat building and coastal rowing.

“Very impressive facility and a great three community effort adding to the attractiveness of an already beautiful coast.”

— Visitor to the Cullen Sea School.

Similarly, Carboast Pier Ltd have recently completed capital improvements to the harbour at Carboast on the Isle of Skye with a £270,000 CCF award. Already, local tourism businesses have commented that the waterfront area is an attractive addition to the village that has improved the experience of visitors and is changing perceptions of the area. The new facilities have also benefitted the local economy through additional demand for shore support and maintenance, watersports, retail and tourism provision. For example, a new boat hire business has already been established.



THEMATIC HIGHLIGHTS

COASTAL AND CYCLE PATHS



PHOTO: The inaugural Arran Coastal Trail Run 2016

Walking is fast becoming a popular activity that people undertake while on a holiday and this is set to grow. For example, VisitScotland estimated that by last year (2015) walking tourism is likely to contribute up to 22% of the overall UK tourism revenue.

Leisure and tourism cycling on the National Cycle Network supports over 15,000 jobs and directly contributes £650m to the economy each year¹¹. According to Mintel – “cycling and walking holidays may be edging up the agenda this year for consumers with just over a fifth (22%) of adults having taken a walking holiday in the last five years and 18% having taken one within the UK”.¹²

According to a 2013 Adventure Trade Travel Association (ATTA) study¹³, Adventure Travel globally rose in value by 195% from 2010 to 2013 to \$263 billion. This is a very significant increase in value in three years, particularly given some economies were still experiencing the effects of the global downturn.

In terms of the contribution of coastal and cycle paths to the market, again there is no robust UK-wide assessment, but the following figures for annual spend and visitor numbers provide some illustration:

➔ **South West Coastal Path - £436 million - 8 million visitors¹⁴**

➔ **Wales Coastal Path - £32 million - 3 million visitors¹⁵**

➔ **Fife Coastal - £27 million - 0.53 million visitors¹⁶**

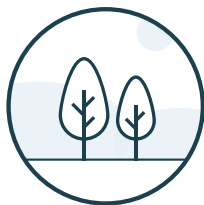
See also ^{17 18 19} for more data.

Thanks to the far reaching geographical nature of these projects; they often involve a range of communities, engage a variety of local businesses and have attracted additional

To date, CCF has supported 19 coastal paths projects with awards totalling £7.2 million.²⁰

funding from mixed sources. With its £278,713 CCF award, the Arran Access Trust has levered in smaller amounts of funding and in-kind support from 10 other sources across the public, private and third sectors to upgrade 12 miles of the Arran Coastal Way and create 3.5 miles of new route. Since the project started in 2014, it has created 7 direct jobs, supported 14 businesses and started 4 new ones, increased visitor numbers by 5,388 and generated £1,673,827 new visitor expenditure. It even started a new event in 2016 – the 12km Arran Coastal Trail Run which 300 people signed up to. It is hoped that this will become an annual event, run in partnership with local businesses.

The Steam Coast Trail project in West Somerset and Devon County Council's 'Destination Dawlish' have been demonstrating the potential for coastal paths projects to engage and build on assets within diverse local communities and businesses. In Devon, an officer is working with local businesses and the community to raise the profile of walking and cycling and to gather momentum for use of the paths network. Summer community events have helped to engage families and individuals in the project, and to introduce local businesses to the opportunities it might offer. Friends of the Steam Coast Trail are working in partnership with West Somerset Council and Sustrans on the construction of the Steam Coast Trail. They have been working particularly closely with both the Minehead and Watchet Coastal Community Teams to integrate their plans for the trail with other local tourism activity and economic strategy. Before construction has even begun, their £637,050 CCF award and local networking has already helped them to make progress in developing new business opportunities for cycle hire, diversification opportunities for outdoor adventure companies, B&B's and cafés.



THEMATIC HIGHLIGHTS

THE NATURAL ENVIRONMENT



PHOTO: RSPB have enhanced visitor facilities at Bempton Cliffs nature reserve in North Yorkshire. After coverage on BBC Springwatch and Countryfile, the centre has attracted more than 89,384 visitors over the past year.

CCF has supported projects to improve the physical built environment and the natural environment. The natural environment in particular - geology and landscape, lakes and seas, flora and fauna - is often a key attraction of coastal communities. There is plenty of scope to make the best of our natural environment, with the British coastline measuring over 11,000 miles across more than 6,000 islands. Indeed, a healthy natural environment is the foundation of sustained economic growth, prospering communities and personal wellbeing.

*"The natural world, its biodiversity and its ecosystems are critically important to our well-being and economic prosperity, but are consistently undervalued in conventional economic analyses and decision making."*²¹

In terms of scale of activities relating to the natural environment, some insight below:

➔ **13 million people visited a beach in 2015**²²;

➔ **79 million people took a trip to the countryside or coasts to watch wildlife**²³

➔ **the value of wildlife tourism in Scotland was estimated at £127 million per annum**²⁴

Organisations such as the Essex Wildlife Trust are providing education about ecologically and historically important areas like the Naze peninsula. They were awarded £1,145,747

to create a visitor centre to broaden access to the area and connect people to the natural environment through a variety of educational events including guided walks and family friendly activities. Since the opening of the centre in summer 2016, 64 volunteers have expressed interest in supporting the two staff in activities and events.

CCF has invested in around 18 projects with a substantial focus on the environment at a total value of around £9,796,904.

Other projects have been both harnessing the power of the environment and protecting it with sustainable energy and technologies. Hadlow College in Kent were awarded £2,675,000 to build a Sustainable Energy Visitor Centre and Mining Museum at the former Betteshanger Colliery near Deal, featuring solar panels and a biomass boiler. It will host educational conferences and events, as well as showcasing and advocating global solutions in ecology, sustainable technologies and food security. Tighean Innse Gall Limited have so far used their £497,419 award to install energy efficiency measures in 151 businesses in Eilean Siar. This has reduced energy consumption by nearly 940,000 kWh, cut carbon emissions by over 450 tonnes and reduced the running costs of businesses by £159,000, increasing their spending power in the local economy.

Ocean Veg Ireland Ltd have been running an unusual project with their £71,844 award, which has enabled them to establish and operate a kelp laboratory on Rathlin Island. As well as making food products in a responsible and sustainable way, it also acts as an educational facility, with more than 60 visitors learning organic kelp production in 2015.

“ Having been involved at the Marine Station at Millport for more than twenty five years, I have seen a lot of highs and lows. However, the recent developments under the Field Studies Council stewardship at the Marine Station are both highly welcome and essential in providing excellent accommodation and dining facilities fit for visiting groups in the 21st Century. Marine Biology at Millport has a long and enduring history and it is fantastic that these excellent developments will ensure its continued longevity.” — Dr Rob McAllen, University College Cork



THEMATIC HIGHLIGHTS

BUSINESS INFRASTRUCTURE & DIVERSIFICATION



PHOTO: The Coleraine Harbour and Causeway Coast Regeneration Project received £443,143 CCF funding and has created 1,500 square metres of new floor space which will be let to Skunk Works Ltd, a company manufacturing surf boards.

CCF's investment into business infrastructure has been largely focussed on supporting the provision of new or refurbished business property.

The provision of business property is often subject to market failure where the rental values or risk elements are such that projects are unable to attract private sector funding. In these instances, there is a clear role for the public sector to intervene and to either provide support to projects or in some case deliver direct provision.

The availability of business property will be a key factor in supporting diversification of coastal communities from traditional activities and into new areas such as business services, creative industries or manufacturing.

CCF has supported over 87 projects which are forecast to provide 85,000 sq/m of business space with an investment of £36m²⁵

These projects have been diversifying their local economies in innovative ways. From Islyn Bakery, the only bakery on the Llŷn Peninsula where you can learn about the history of Aberdaron; to Cwrw Llŷn, an old cow shed turned industrial warehouse offering guided brewery tours. In Hastings, the Council's Sea-Escapes project is making the most of the

town's culture and heritage and raising the profile of their contemporary offer in creative ways, from the creation of The Source BMX park, to the ROOT 1066 International Festival of contemporary arts inspired by the 950th anniversary of the Battle of Hastings. It has supported 180 private businesses and the start-up of 22 new businesses.

Cardiff Marine Group have been successful in bringing trade to Aberystwyth Marina following their £300,000 CCF award. Having completed most of the physical improvements to the marina, they have increased boat numbers significantly – three fold from 2015 to 2016. Business sales have already increased by £450,000, with £300,000 new visitor expenditure, with both figures forecast to reach £1,500,000. CCF funding has also effectively seeded an ongoing investment programme in the marina.

Meanwhile in Hull, Watergate Developments have been building the Centre for Digital Innovation, which provides space, advice and support for digital businesses. Their £300,000 CCF award has funded the construction of a river defence wall, which has supported the required development of the old dry dock area. Along with huge European Regional Development Fund and private sector investment, the centre will create 40.5 direct jobs, 4,244 sq/m new floor space and support for 493 businesses. This is one of three awards that CCF has made in Hull, which form part of a wider investment programme in advance of the city's status as UK City of Culture in 2017 and strengthen its position within the Northern Powerhouse.

“ The work of Papay Development Trust has been transformed thanks to CCF support. Now our island has a much broader range of community business activities, from offering boat trips to visitors to producing our own home-grown vegetables.”

— Julian Branscombe, Secretary of Papay Development Trust

CONCLUSION

The Coastal Communities Fund has made a significant contribution to coastal areas across the UK since it launched in 2012, supporting them to create sustainable economic growth and jobs. Around £125 million CCF investment has generated or complemented co-funding of £172 million from across the public, private and voluntary sectors – with every £1 of CCF funding attracting £1.4 from other sources. It has already supported over 7,000 SMEs and nearly 500 new business starts, with these figure forecast to rise to over 10,000 and 1,300 respectively. Around 7,000 jobs have been created or safeguarded already, with a further 11,000 forecast.

The majority of CCF spend has been in the tourism and hospitality sector – nearly £80 million. This has already generated an increase in visitor numbers of over 2 million and increased visitor spend by £171m, forecast to rise to over 8 million and £360 million respectively.

Funding for business, enterprise, training and skills has also helped coastal communities to diversify their local economies – from organic kelp production to manufacturing surf boards. Other funded projects are leading the way in creative industries, ecology, and sustainable energies technology.

Around 80% of CCF funding has supported projects making improvements to infrastructure, property and the environment. This reflects the potential for coastal communities to build on their physical assets and funded projects have demonstrated how capital improvements can transform local communities. Many CCF awards have

catalysed wider growth, such as the £3 million invested in marina berths and £7.2 million for coastal paths. These projects have stimulated local economies, forged partnerships across communities, engaged a variety of local business and attracted additional funding from mixed sources. They have changed perceptions of local areas and helped communities to think differently about their assets and identify new business opportunities.

Whilst they are often characterised by some common challenges, our coastal communities are very diverse, with a variety of issues and assets to consider. The CCF has supported a broad range of projects to think creatively about regeneration in their area and ways to stimulate their local economy. These projects are creating vibrant places and communities that continue to show resilience as they diversify and transform their local economies in imaginative ways.

⁶ A Strategic Framework for Scotland's Marine Tourism Sector 2014

⁷ Source: Scottish Marine Recreation and Tourism Survey 2015

⁸ This includes shipbuilding, fisheries aqua-culture and other non-tourism sectors

⁹ Source: <http://britishmarine.co.uk/Services/Growth/Statistics-and-Market-Research/Headline-Statistics>

¹⁰ Source: Visit England 2015

¹¹ Source: <http://www.sustrans.org.uk/our-services/what-we-do/boosting-local-economies/cycle-tourism-boosts-economy>

¹² Source <http://www.mintel.com/blog/travel-and-tourism-market-news/walking-and-cycling-holidays-britain>

¹³ Source: Adventure Tourism in Scotland 2015

¹⁴ Source: www.southwestcoastpath.org.uk

¹⁵ Source: www.bbc.co.uk/news/uk-wales-25096911

¹⁶ Source: <http://www.snh.gov.uk/docs/B726802.pdf>

¹⁷ <https://www.nationaltrust.org.uk/lists/coastal-walks>

¹⁸ The Value of Cycle Tourism: Opportunities for the Scottish economy, Transform Scotland 2013

¹⁹ Feasibility study of MTB trails in the Three Valleys, Bridgend Prepared for Bridgend Borough Council.

²⁰ Based on projects where coastal paths are the primary focus.

²¹ Source: UK National Ecosystem Assessment, cited in The Natural Choice: securing the value of nature, DEFRA 2015

²² Source: Tourism Alliance 2015

²³ Source: Visit Britain 2014

²⁴ Source: Valuing nature based tourism in Scotland, Scottish Natural Heritage 2010

²⁵ These are projects with business property outputs, but will also include other elements, so the investment is overstated.



THIS PAGE: Cardiff Marine Group's physical improvements to Aberystwyth Marina have been successfully in bringing trade.



Delivered by Big Lottery Fund on behalf of UK Government and the Devolved Administrations in Northern Ireland, Scotland and Wales



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