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# **The Current Economic Value of the Cuckmere Estuary**

**Public Evidence Meeting Presentation  
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**eftec**



# Objective

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To determine the current economic benefit Cuckmere Estuary brings to the local area.

- Important tourist attraction
  - expenditure
  - net benefits
  - jobs
- Agricultural value



# Methodology

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## Four components:

- Extrapolation from the visitor survey undertaken by Tourism South East
  - visitor expenditure estimates (survey)
  - visitor number estimates (literature)
- Survey of local tourism businesses
  - turnover, employment and dependence on tourists
- Correction for costs of providing services
- Estimated values from agricultural land
  - national averages for this type of land



# Visitor numbers

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No recent or exact figures for total number of visits

- Seven Sisters:
  - car park counters: 210,000 summer, 120,000 in winter.
  - park manager: 300-500,000
- RPA: 320-340,000 summer, 160,000 winter.
- Our central assumption: 460,000
  - 320,000 summer and 140,000 winter.



# Visitor expenditure per head

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Survey gave spend on different activities for each group

- Used to work out spend per person across all visitors
- For example, average of £2.17 per head on accommodation. Seems low? Because:
  - most visitors do not stay overnight
  - some who do are staying with friends/family
  - per head not per group
  - we only count one night per trip

<b>Activity</b>	<b>Per head (summer)</b>	<b>Per year</b>
Eating & Drinking	£2.02	£880,000
Pubs	£2.89	£1,305,000
Shops	£0.81	£453,000
Entertainment	£0.56	£178,000
Travel	£1.90	£800,000
Accommodation	£0.54	£236,000
<b>Local total</b>		<b>£3,853,000</b>
<i>Elsewhere</i>	<i>£0.53</i>	<i>£235,000</i>
<i>Accommodation</i>	<i>£1.63</i>	<i>£662,000</i>
<b>Grand total</b>		<b>£4,750,000</b>



# Visitor expenditure estimates

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Total annual spend associated with visits to the Cuckmere Estuary estimated to be approximately £4,750,000 in 2010

Of this, about £3,850,000 is spent in the area within 8 miles of the Estuary



# Local Businesses

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Email and phone survey of 33 local visitor-related businesses

- within about 4 miles
- response from 26 consultees
- moderately to highly dependent on visitors: estimate 60% turnover on average
- equivalent to £3,780,000 per year
- approximately 100 full-time equivalent jobs
- Experian data: 77 such businesses





## Why is this result higher?

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- Visitor numbers underestimated?
- Visitors underestimate final expenditure?
- Businesses overestimate dependence on Cuckmere tourists?
- **Businesses count spend through entire stay, we count 1 night:**
  - for those staying, average stay more than 7 nights
  - but we count only one night as due to the Cuckmere Estuary
  - if they go back, counts as another visit



# Accounting for costs

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Not all of the visitor expenditure represents net gain to the area

- Costs of raw materials, goods etc.
- Use ratios of gross value added to turnover
  - Hotel and restaurant: 46.8%
  - Retail: 16.1%
  - Transport: 37.8%
- So net impact is £1.6 million for local area
  - £400,000 for expenditure outside this area.



# Agriculture

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- Estuary south of the A259
- 79 hectares
- Farm Business Survey “Lowland grazing livestock”
  - Farm Business Income £217/ha
  - £252/ha for larger farms
- Approximate value £20,000 / year.



# Summary of findings

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## **Approximate net economic impact**

- **In the immediate area: £1.6 million**
- **Outside this (mostly East Sussex):  
£400,000**

## **The total expenditure is higher:**

- **In the immediate area: £3.8 million**
- **Outside this (mostly East Sussex): £1 million**

**This is only expenditure due to Cuckmere  
Estuary visits**



## Next steps

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Phase 2 will assess the likely impacts of future management options ...

- on visitor infrastructure?
- on access / rights of way?
- on specific activities?
  - canoeing, agriculture, bird watching...
- on 'attractiveness'?
- How might these impacts influence total visitor numbers, and the associated economic value to the local community?



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Thank you

Any questions?

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