2015s3397
Slapton Line Economic Valuation
Slapton Line Partnership
11th February 2016
S Lucas (Development Economics). D Taylor (JBA)
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1 Purpose and coverage of the note

The purpose of this report is to present findings that quantify the current economic contribution of the "Slapton Line" road (A379) that extends north of Torcross in the direction of Blackpool and towards Dartmouth. The approach taken to isolating the road's contribution is to consider scenarios where the road may be lost due to a major coastal flooding event.

In particular, two aspects of the road's contribution are quantified:

- the potential effects on local traffic including that of residents and local service providers if the road was lost either temporarily or permanently; and
- the potential effects of the temporary or permanent loss of the road on the local visitor economy.

1.1 Defined study area

The primary assessment area of this study, which is that area likely to be significantly impacted by closure of the Slapton Line, is covered by the settlements of Chillington, Beeson and Kellerton and Torcross. This area was chosen as it is the "best-fit" for the area that is served by the Slapton Line for residents who wish to access the service centre of Dartmouth. In terms of data on the economic profile of the area, the best fit for the study area is that area defined by the 2011 Ward "Stokenham" (E36002330).

The wider assessment area is bounded by the A379, A381 and A3122, and included the major settlements of Kingsbridge and Dartmouth.

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The extent of both the primary assessment area and wider study area are shown overleaf.



JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL





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Page 2 of 17

2015s3397
Slapton Line Economic Valuation
Slapton Line Partnership
11th February 2016
S Lucas (Development Economics). D Taylor (JBA)
FINAL



2 Data Review

2.1 Economic Profile: Supply of labour

The latest estimates of the population of the area are from the ONS 2013 Mid-year population estimates series. The latest data (2013) indicates that Stokenham ward has an estimated residential population of 980.

Data on the economy of the area is slightly older, dating from the 2011 Census. According to this source, at that time Stokenham ward had 735 are economically active¹ residents (76.0% of the 2011 residential population aged 16-64), of which:

- 710 were in employment
- 25 were unemployed

Of those in employment in Stokenham ward, a high proportion (256 people, 26.5% of the 16-64 population) was classified as being self-employed. By way of a benchmark, the England & Wales average for self-employment is only 10.4%. High levels of self-employment are typically found in areas that are reliant on tourism and/or agriculture.

Data from the same source suggests that 62% of those in employment were working on a full time basis, with 38% working part time. The England & Wales average for part time working is 29.3%, so the higher level for Stokenham ward may indicate a level of under-employment prevalent in the area.

When this data is disaggregated by gender, it is clear that the higher level of incidence of part time working is concentrated among female residents of the Stokenham ward area:

- Of males in employment, 21.3% work on a part time basis (national average for males = 29.3%)
- Of females in employment, 56.1% work on a part time basis (national average for females = 44.3%)

In addition to those who are economically active, Stokenham also had (in 2011) 232 economically inactive residents. Of these, the majority (126) were retired. Other forms of economic inactivity included those studying (28) and with caring responsibilities (32) or whose health does not permit them to work (26).

Census data also permits a profiling of the occupational structure of the local employment base (i.e. those in employment). In the case of Stokenham ward, the profile (using standard occupational classifications used by ONS) are as follows (with the proportions for South Hams district and England & Wales provided for benchmarking purposes):

¹ Economic activity is defined as those currently in employment plus those who do not have a job but who are available for and are actively seeking work.



JBA



2015s3397
Slapton Line Economic Valuation
Slapton Line Partnership
11th February 2016
S Lucas (Development Economics). D Taylor (JBA)
FINAL



Occupational classification	Stokenham (%)	South Hams (%)	England & Wales (%)
Managers, Directors & Senior Officials	16.6	14.0	10.8
Professional Occupations	13.0	18.8	17.4
Associate Professional & Technical Occupations	10.2	12.1	12.7
Administrative & Secretarial Occupations	8.7	9.3	11.4
Skilled Trades	21.1	16.1	11.5
Personal Service Occupations	8.5	9.1	9.4
Sales & Customer Service Occupations	5.4	6.6	8.4
Process, plant %machine operatives	4.0	4.7	7.2
Elementary Occupations	12.6	9.4	11.2

The most significant divergences from national benchmarks include:

- a lower proportion of workers in professional occupations
- a higher proportion of workers in skilled trades occupations

2.2 Economic Profile: Demand for Labour

Having considered the profile of the working population, it is also pertinent to consider the demand for labour, in terms of the numbers of employee jobs. However, one issue with respect to Stokenham ward is the high proportion of those in employment who are self-employed. At a local authority level (South Hams) there is an annual source of updates on self-employment via the Annual Population Survey, but this source is not available for smaller areas such as wards. There is source of information about self-employment at a sub-district level other than the Census, which clearly is only available for 2011.

With respect to trends for employees, there is an annual source for sub-district geographies, which is the Business Register and Employment Survey (BRES) published on an annual basis by ONS. The latest BRES data (for 2014) was released at the end of September, 2015. However, as well as estimating employee jobs, the BRES data series also provides data on employment, which is defined as employees plus working proprietors. The working proprietor element includes some (but not all) of those who are self-employed, so it does provide a partial insight into this component of the workforce.

An important point to note about the BRES data is that it is workplace-based: i.e. it focuses on employers rather than households.

The latest employee data for the Stokenham ward (2014) indicates there are 307 employee jobs located in the ward, with 41% of these found in the Accommodation & food sector. When working proprietors are included, the total increases to 356 jobs.

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JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL



However, it is not possible to provide a detailed breakdown of these statistics because some of the data is nondisclosive (i.e. providing the data would be unlawful, as it may reveal details of individual businesses). However, the data that can be revealed includes the following:²

Business sector	Employee Jobs (number)	Employee Jobs (% of total)	Employment (number)	Employment (% of total)
Accommodation & food	125	41%	144	40%
Public sector	69	22%	75	22%
Construction	46	15%	59	17%
Wholesale & retail trade	20	7%	27	8%
Professional services	11	4%	12	3%
Arts, entertainment, recreation	confidential	confidential	24	7%
All others	36	12%	15	4%
Total	307	100%	356	100%

The parts of the local area economy that are potentially most sensitive to the continued availability of access via the Slapton Line are those that are related to tourism and the visitor economy. In terms of employment (employees plus working proprietors) this includes the Accommodation & food sector, Retail and the Arts, entertainment and recreation sectors. Together these three sectors accounted for 195 jobs in Stokenham ward in 2014, which was 55% of the total.

2.3 Travel to Work Patterns: Census Data

The next topic to consider is the pattern for travel to work. The main source of evidence is the travel-to-work origin-destination counts that are available for small areas from the 2011 Census.

The best fit definition for the area of interest covers is the super output area South Hams 011C, which is a close fit to the Stokenham ward. According to the 2011 Census there were 363 working residents in this area in 2011.

This Census data can be interrogated to determine what proportion of the travel to work trips affecting residents of area South Hams 011C might be affected by disruption to the A379 road along Slapton Line. This was undertaken by isolating residents originating in South Hams 011C whose travel-to-work destination was covered by the area in a northerly direction, and in particular the following super output areas:

- South Hams 004D
- South Hams 007A through to 007D
- South Hams 011B

² An anomaly is that employment data for the Arts, entertainment and recreation sector can be revealed but employee data cannot.



JBA



JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL



The total number of travel to work trips from output area 011C to these six other output areas is as follows:

Destination	Number of residents of 011C
004D	6
007A	4
007В	14
007C	10
007D	3
O11B	15
Total	52

That is, of the total number of travel to work trips (363) recorded by the Census that originate from South Hams 011C, a total of 52 (14%) could be potentially affected by the loss of the Slapton Line road.

It is also possible to use the same source of data to determine the number of potential travel to work trips originating in the north of the district that have as their destination super output area South Hams 011C. That is, residents of wider Dartmouth area who travel to the Stokenham ward area for their work. The numbers of these trips revealed by the Census data is a total of 13.

The total number of travel-to-work trips potentially affected by the loss of the road is therefore estimated to be 65 (52 in a north-bound direction and 13 in a south-bound direction).

2.3.1 Evidence from Traffic Counts

It is also useful to consider is the available evidence from traffic count data from the A379 through along the Slapton Line road. This data is collected on a regular basis by the highways authority, in this case Devon County Council.

The A379 along the shingle bank at Slapton Ley is a Secondary County Route in the Devon road network. It is described as a *'low speed, low capacity route which contains numerous narrow single lane sections, particularly within the villages through which it passes'*.³ The length along the Ley is subject to a 40mph speed restriction.

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³ Scott Wilson report, August 2006

JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL



The alternative route between Kingsbridge and Dartmouth is of a generally better standard and is the recommended route for commercial vehicles.

The A379 route across Slapton Ley is however popular with tourists and day visitors, due to the attractive scenery including the availability of sea views in places.

Average daily traffic counts for the route for calendar year 2014 confirm that usage of the road peaks in the summer months (the most important time of the year for tourists).



A379 average daily (24 hour) traffic flows, January to December 2014

Source: Devon County Council

The analysis of more detailed data in a 2006 report produced by Scott Wilson identified that the peak flows of traffic occurred on Summer Sundays, when total daily flows are in excess of 4,000 vehicles (both directions).

Analysis of hour-by-hour traffic flow data confirms that the road is not heavily used for travel-to-work purposes. Based on an assessment of data from June 2010, only 6.7% of all 24 hour traffic occurs at the (usual) peak time for a.m. commuting. In August the equivalent figure is 4.3%. The chart below shows the distribution of traffic flow based on June 2010 data:



JBA consulting



JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL

JBA consulting

A379 average traffic flows, 24 hours June 2010



Source: Devon County Council

2.4 Tourism Data

The seasonal variation in the traffic data presented in a previous section of this report confirms that a key economic function of the A379 Slapton Line is as a road that brings tourists and day visitors to the Stokenham/Torcross area.

The local importance of the tourism and visitor economy has been underlined by the significantly above average representation of employment in the area in business sectors (such as Accommodation & food, Retail and Arts, entertainment and recreation) that approximate the Tourism and visitor economy.

The current economic value of the road – in terms of supporting the local visitor economy – has been quantified using the following methodology:

- Estimation of visitor car journeys along the road. These were estimated using County Council highways data for 2014. January was taken as a 'base month' when no visitors are assumed to be present. Vehicle counts in excess of the January baseline for the rest of the year are assumed to be visitors.
- **Origin-destination assumptions**. It is assumed that 80% of day trips are from visitors or residents originating from the area North of the Ley. The other 20% are assumed to be staying in the Stokenham wards area and are journeying in the direction of Dartmouth for the day.
- Estimation of single trip/return journeys. Account was taken of the fact that some vehicles may be counted twice if they make a return journey on the same road. It is assumed that 75% of day visitor vehicle movements are single direction (North to South), with 25% making a return journey.
- Average visitors per vehicle. The average number of adults per vehicle is assumed to be 2.
- Average spend per visitor: according to County/District Council tourism data, this amounts to £32.19 per day visit.



JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL



Using this methodology, based on 2014 data the road is estimated to deliver:

- Approximately 144,000 day visitor car journeys to Torcross each year (from the North, including round trip journeys that carry on back to the Dartmouth area via an inland route.
- Associated adult visitors totalling approximately 288,000 per annum
- Annual attributable visitor spend worth £9.28 million per year (based on an average expenditure figure of £32.19 per day).

Attributable visits Attributable Attributable visits (cars) (visitors) spending (£m) Jan _ --Feb 2,822 5,645 0.18 Mar 6,008 12,016 0.39 Apr 12,402 24,804 0.80 15,884 31,769 1.02 May Jun 18,990 37,980 1.22 Jul 25,984 51,968 1.67 30,727 61,454 1.98 Aug 19,080 38,160 1.23 Sep Oct 9,040 18,079 0.58 Nov 2,448 4,896 0.16 837 1,674 0.05 Dec 144,223 288,445 9.28 Total

The value estimated to be contributed by the road on a month-by-month basis is set out in the table below.

2.4.1 Converting Tourism Spend into GVA

It is also necessary to convert attributable tourism expenditure into Gross Value Added. GVA is a national accounting concept, and is widely used as a proxy for the contribution made by industries and sun-national areas to national Gross Domestic Product.

Local tourism expenditure is converted into an estimate for GVA by reference to ONS data on regional (South West) GVA and regional employment is sectors most relevant to tourism (SIC 56 and 57). Using data for the 2008-2011, the conversion factors that are used are:

- On average, £1 million of tourism expenditure is assumed to result in the creation of £0.443 million of GVA (i.e. a ratio of 1.00:0.443).
- One job is supported for every £32,579 of tourism expenditure (this figure has been converted to 2014 prices using the GDP deflator series published by HM Treasury).



JBA



JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL



On this basis, the baseline value of GVA that is assumed to be delivered by the road is worth approximately £4.11 million per annum to the local economy, based on 2014 prices.

All financial values in the model are expressed in terms of 2014 prices. Future financial values are discounted at 3.5% per annum in line with Green Book guidance.



Page 10 of 17

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2015s3397
Slapton Line Economic Valuation
Slapton Line Partnership
11th February 2016
S Lucas (Development Economics). D Taylor (JBA)
FINAL



3 Financial Impact of Road Closure

In considering the economic contribution of the A379 Slapton Line to the economy of the Stokenham/Torcross area, the following aspects have been considered.

- the potential disruption to local traffic in terms of additional journey times and travel costs that would result if the A379 route across Slapton Line was disrupted or lost due to storm damage and
- the potential loss to the local visitor economy if day visits to the area were reduced as a result of the A379 route across Slapton Line being disrupted or lost due to storm damage.
- Increased flood damages to properties in Torcross as a result of tidal flooding, caused by the loss of the embanked highway.

3.1 Scenarios Considered

Three alternative future scenarios have been examined:

- 1. Baseline scenario: a baseline scenario explores the potential implications of the current situation rolled forward. The baseline scenario assumes no disruption to the road from flood events.
- 2. Permanent loss of road from flood events. This scenario assumes a catastrophic flood event that severs the road (which is assumed to be not replaced). However, under this scenario, it is not realistic to assume that all day visits from the Dartmouth area to the Stokenham ward area would be lost, as there are alternative inland routes available. Two variants are considered:
 - a. loss of 30% of visitor income each year following the flood event
 - b. loss of 60% of visitor income each year following the flood event
- 3. Temporary loss of road from flood events. This scenario assumes a temporary loss of the road from flooding occurs every 5 years. The event is assumed to occur in winter (November-February) but take 3-4 months to repair in the Spring/early summer. The overall effect is to assume that a proportion of visitation and visitor income is lost every 5th year. Two variants are considered:
 - a. loss of 30% of visitor income in the March-June period in the flood event year only
 - b. loss of 60% of visitor income in the March-June period in the flood event year only

All financial values in the model are expressed in terms of 2014 prices. Future financial values are discounted at 3.5% per annum in line with Green Book guidance.

3.2 Damages from Local Traffic Disruption

The approach taken to estimating local traffic damages that might occur from the temporary or permanent loss of the Slapton Line road is largely based on the methodology deployed by Scott Wilson in their 2006 report. However, there is a variation in the approach used here, in that the Scott Wilson method is used to quantify traffic movements associated with <u>local</u> residents and businesses. A second, complementary method – introduced below – separately quantifies impacts associated with <u>visitors</u> to the area (i.e. the potential impact of the temporary or permanent loss of the road to the local visitor economy).

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JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL



Both tasks have been undertaken using recent traffic count data and an up-to-date price base.

The baseline for local traffic is approximated using the average daily traffic count for the month of January, utilising County Council data for 2014. This amounts to average daily movements of 1,663 vehicles.

The following additional assumptions are then utilised, based on the same approach as deployed by Scott Wilson in their 2006 assessment:

- the average daily local traffic flow is reduced by a factor (6/7ths) to reflect reduced localised traffic on weekends
- it is assumed (as did Scott Wilson) that 70% of journeys would be affected by the loss of the road
- it is assumed (as did Scott Wilson) that the average increase in local journey length that would occur if the road is closed due to storm damage is 6 miles
- the average running cost per mile is assumed to be £0.2074, based on estimates for 2014 published by the AA.⁴

On this basis, the local traffic damages resulting from the total loss of the road would amount to £453,207 (2014 prices) in a full year.

Under a scenario where the loss of the road was temporary, the cost would amount to £37,767 for each month that the road is unavailable to be used.

The table below sets out the results of these alternative scenarios. The scenarios are expressed as the value of local traffic damages incurred compared to a Reference Case scenario where no future disruption to the road takes place.

Scenario	Local traffic damages over the 25 year period compared to the Reference Case
2 (permanent loss)	£7.47 million
3 (temporary loss)	£0.30 million

That is, potential future costs in terms of local traffic damages from the permanent loss of the road might amount to ± 7.47 million over a 25 year period. On the other hand, losses – in terms of local traffic damages – from periodic temporary disruption to the road are estimated to be far lower, at ± 0.30 million over 25 years.

⁴ The estimates assume a mid-priced, petrol engine car and a per litre fuel cost of 110p.



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JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL



3.3 Loss or Disruption to the Visitor Economy

The table below sets out the results of the scenarios. The scenarios are expressed as losses of GVA that are expected to occur compared to the Reference Case scenario where no future disruption to the road takes place. These values are based on an assumption that closure of the road will primarily affect day-trip visitor numbers, with little impact on overnight visitors. Whilst there may be short-term impacts on overnight visitors as a result of press stories relating to closure of the Line, it is considered that overnight visitor numbers will recover (as they have in other areas affected by flooding or other major disruption). It is therefore appreciated that the analysis provides a conservative estimate of tourism losses, and future studies should carry out surveys to better understand the reasons for tourists visiting the Ley, to better understand the likely impact on tourist spend.

Scenario	GVA lost over the 1-25 year period compared to the Reference Case (2014 prices, discounted at 3.5%)
2a	£20.34 million
2b	£40.67 million
3a	£1.21 million
3b	£2.42 million

3.4 Damages associated with Tidal Flooding

A simple assessment of the flood risk benefit provided by the Line itself was carried out, to determine whether the embanked acts as a flood defence to protect Torcross against tidal flooding.

Hydraulic modelling of the area was not made available for this study so the impacts of wave overtopping on water levels in Slapton Ley, or wave propagation in the event of a breach of the road, could not be assessed as part of this study. This assessment has therefore only considered static tide levels. This assessment also cannot consider the impact of the formal flood defences at Torcross, however these will be assessed separately by the Environment Agency.

Current day design tidal levels were supplied by the Environment Agency, and upper end climate change allowances were applied based on the Environment Agency's "Adapting to Climate Change" report.

Return Period (1 in x year)	Peak Tide Level (2015) (mAOD)	Peak Tide Level (2065) (mAOD)	Peak Tide Level (2115) (mAOD)
2	2.88	3.295	3.91
10	3.04	3.455	4.07
25	3.12	3.535	4.15
100	3.26	3.675	4.29

JBA

2015s3397
Slapton Line Economic Valuation
Slapton Line Partnership
11th February 2016
S Lucas (Development Economics). D Taylor (JBA)
FINAL



250	3.36	3.775	4.39
500	3.43	3.845	4.46
1000	3.49	3.905	4.52

LiDAR data supplied by the Environment Agency shows that properties in Torcross are generally higher than 4m AOD, indicating that they would not be at risk of tidal flooding from the Ley in events up to the 1 in 1000 year event either in the current day or in 2065, and therefore the Line provides little benefit in terms of protecting against flooding purely from high tide levels.

It is predicted that sea level rise as a result of climate change will significantly increase the risk of tidal flooding to low-lying properties in Torcross, with most events above showing water levels above 4m AOD (estimated lowest property threshold level). The road level of the line is at approximately 5.5m AOD, so would protect the village against tidal flooding in the 2115 scenario. It is predicted that the road will be lost within the next 30 - 50 years, and that it will not be financially viable to retain it beyond this date, however this assessment highlights the potential benefits in retaining some form of bank with a level of at least 4.52m AOD to mitigate tidal flood risk.

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JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL
Status	FINAL



4 Non-quantifiable impacts

The main focus in this report is on the quantifiable economic contributions of the A379 Slapton Line that are at risk from a major coastal flooding event. However, there are additional important contributions that are also at risk, but for which a monetary estimate of value cannot readily be made. The approach taken to potential effects on these additional contributions is to describe them in brief, but without any attempt to quantify or monetise them in any way.

4.1 Impact on transport related business

Whilst a relatively simple analysis of increased travel times and costs could be carried out to investigate the impact of road closure on commuter traffic, a more detailed analysis would be required to understand the impact on businesses as a result of increased delivery times and distances. This is most likely to apply to impact on logistics firms with regular deliveries carried out within the study area, however it will affect any business with a need to travel along the line as part of their work. Additional traffic surveys to understand the reasons for travel and frequency of business travel along the line will need to be carried out to quantify this impact.

4.2 Public transport links

First Western National uses the A379 to link Kingsbridge to Dartmouth with its route 93 service. There are approximately 9 services daily (Monday to Saturday) and 4 on Sunday. Loss of the Slapton Line would likely necessitate replacement with feeder services from (1) Torcross to Kingsbridge and (2) Strete to Dartmouth, with interchanges at the larger towns to enable service continuity via the inland trunk road.

Substitution of the current through service with feeder services would therefore lead to lengthened journey times for users, with the likelihood of reduced patronage occurring as a result. Apart from potential inconvenience to local residents, this may also discourage visits to the area from tourists who do not have access to a private car.

However, given a lack of available data at this time we have not been able to quantify and monetise the potential impacts on either residents or visitors to the area.

4.3 Access to schools

The loss of the road (and the quality of bus services the road enables) could also have a potential negative impact on the choices available to parents in terms of selection of schools for their children. In particular, it is understood that the secondary school catchment areas divide at Strete, and hence there could be disruption to school choice preferred by parents if the Slapton Line road was not available. In future this could in particular affect parents who are unable to place their children into the secondary school at Kingsbridge, where demand for places is understood to be particularly high.

4.4 Emergency services

A potential closure of the A379 in the Torcross area could have negative effects on the ability of the fire service to provide a second appliance to incidents that occur in the study area. For example, the ability of the fire service to provide a second appliance to emergencies in the Slapton village area from the Kingsbridge base. Similar issues may also apply to the police and ambulance services.

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JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
Author	S Lucas (Development Economics). D Taylor (JBA)
Status	FINAL

4.5 Public and commercial collections and deliveries

It is likely that deliveries to households and businesses located in the Torcross area would be made more difficult (and/or less efficient) by any loss of the A379 Slapton Line. This would likely include:

- daily postal collections and deliveries;
- refuse collection
- deliveries of milk, newspapers, etc.

It is accepted that – to an extent – the potential negative impact on these services is captured by the assessment on 'local traffic damages' set out above. However, it is possible that the disruption to deliveries/collections may impose additional negative consequences that are not fully captured by the valuation of additional miles travelled. For example, it is possible that the re-routing of deliveries made by vans or trucks may require a longer diverted journey than the estimate of 6 miles that derives from the 2006 Scott Wilson report.

Page 16 of 17

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JBA Project Code	2015s3397
Contract	Slapton Line Economic Valuation
Client	Slapton Line Partnership
Day, Date and Time	11th February 2016
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Status	FINAL

5 Conclusions

This report has identified that the potential loss of the A379 in the vicinity of Torcross would result in disruption to local traffic that would amount to around £37,800 per month, or £453,000 over a full year.

When assessed over a 25 year appraisal period, the value of the potential additional costs in terms of local traffic damages could range from £0.30 million (where there is only a temporary loss of the road on a short term basis every 5 years) to £7.47 million (where the road is lost permanently).

All of these estimates have been produced on a discounted basis, with costs that could be incurred in future years discounted at 3.5% per annum.

In terms of potential impacts on the visitor economy, the total loss of the road would result in damages worth between £20.3 million and £40.7 million in Gross Value Added over a 25 year period, where the potential effects in future years are discounted at 3.5% per annum.

The temporary loss of the road would result in damages to the visitor economy who between £1.2 million and £2.4 million over the same period, where potential future costs are also discounted at 3.5% per annum over 25 years.

It is considered that loss of the road would have no significant impact on damages associated with tidal flooding. It has not been possible to estimate the impact on flood risk damages associated with storm surges and wave overtopping.

In addition to these quantifiable effects, the loss of the road would also result in disruption to public transport services, and also would erode the quality of deliveries and collections made to local households and local businesses.

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