

Wales Coast Path – Anglesey

Business Survey 2024

Julie Hollingsworth, Associate Director
jhollingsworth@djsresearch.com

Clare Rapkins, Senior Research Manager
crapkins@djsresearch.com

Emily Ward, Senior Research Executive
eward@djsresearch.com



Contents

- 3 Background and methodology
- 6 Business profiles
- 11 Importance of the path to business
- 16 Path quality
- 19 Path promotion
- 28 Conclusions and recommendations



Wales Coast Path - Anglesey

Background and Methodology

Background and Methodology

The primary aim of this survey is to enhance Natural Resources Wales' and other stakeholders' understanding of the support required by businesses to fully leverage their location and the opportunities presented by Wales' long-distance routes, namely the Wales Coast Path (including the Pembrokeshire Coast Path), Offa's Dyke Path National Trail and Glyndŵr's Way National Trail.

Overall, the objectives relate to all long-distance routes, however, this report specifically focuses on the benefit of the **Wales Coast Path on Anglesey**.

The key objectives include:

- Identifying the types of businesses operating on or near the routes.
- Understanding the services provided by businesses in proximity to the routes.
- Assessing the benefits the routes bring to businesses, encompassing both direct and indirect income generated throughout different seasons.
- Evaluating the level of collaboration among businesses along the routes.
- Soliciting opinions on issues such as public transport availability, visibility, accessibility, signage, marketing, support, and any challenges or barriers related to the routes.
- Exploring interest and support for establishing a dedicated Wales Coast Path Business Portal.
- Facilitating comparison with previous surveys conducted on the same subject matter where possible or relevant.



This survey was conducted via CATI (Computer Assisted Telephone Interviewing). To ensure inclusivity and accessibility of the survey, an online option was also provided.

To qualify for the survey businesses had to either consider themselves close to one of the long-distance routes (within walking distance or a short drive) or state their business benefits from one of the routes in some way.

Overall, just over a thousand businesses were surveyed, of which **70 are located on Anglesey** and were assigned to the Wales Coast Path, based on that being their closest route or the one which they derived the most benefit from. This report focuses on those businesses only.

A guide to this report

Rounding

Results are presented in this report as whole numbers for ease of reading and interpretation. Rounding is performed at the last stage of the calculation for maximum accuracy. Therefore, where results are presented as % positive, % neutral or % negative, there may be instances where the results do not total 100%. The differences should never vary by +/-1% point.

Base sizes

Please note, the base sizes included are the total number of people who responded to a particular question. As not everyone answered all questions, the base for individual questions may be lower than the total number of respondents who responded to the survey, are located on Anglesey and were assigned to the Wales Coast Path (70).

Definition of 'Assigned' path

After answering a series of screening questions to determine the proximity (So2a, So2b) and importance of routes to individual businesses (So3, Qo1 and Qo2), businesses were assigned a path and asked to respond to the remaining survey questions based on their 'assigned' path. In instances where businesses were located close to or benefitted from more than one path/trail, they were assigned to the one which either a) generated the highest proportion of sales/turnover or b) they are most reliant on for their business.

Comparison to 'total' values

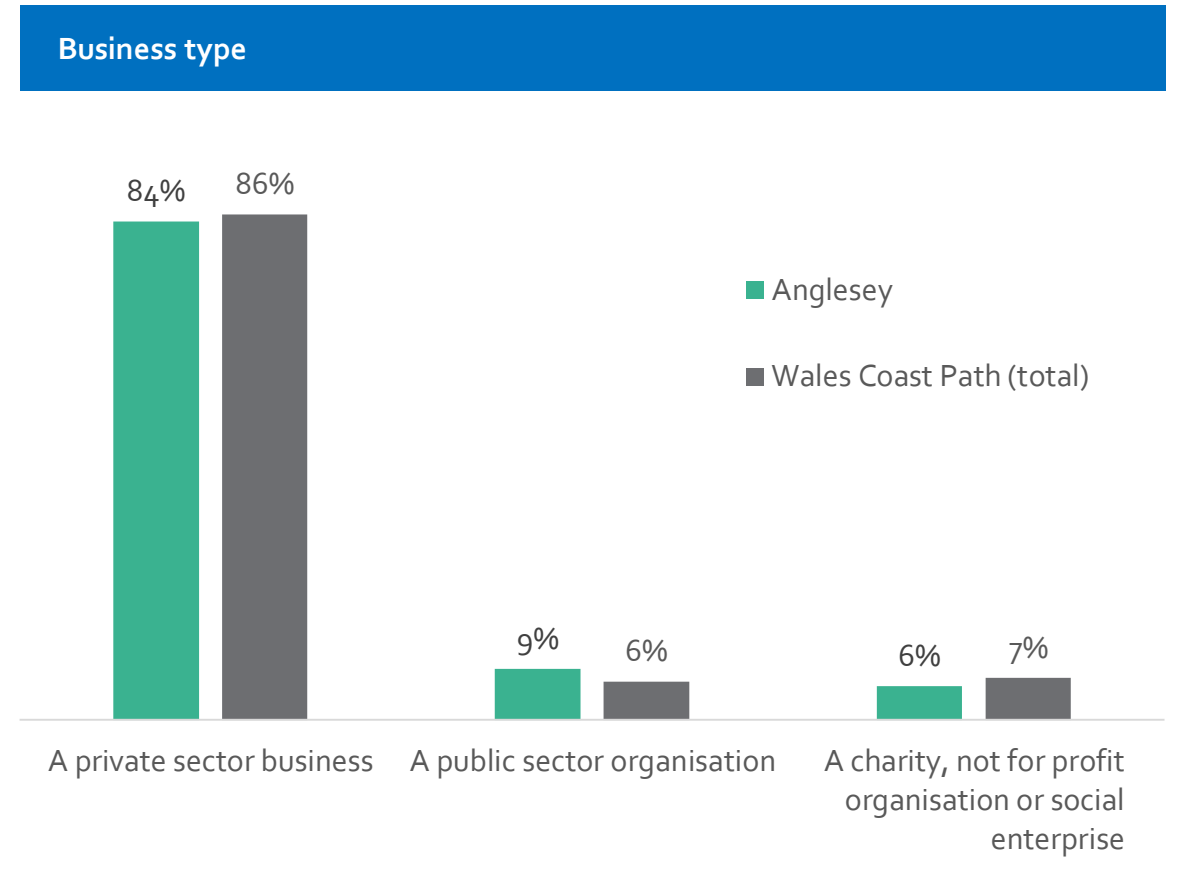
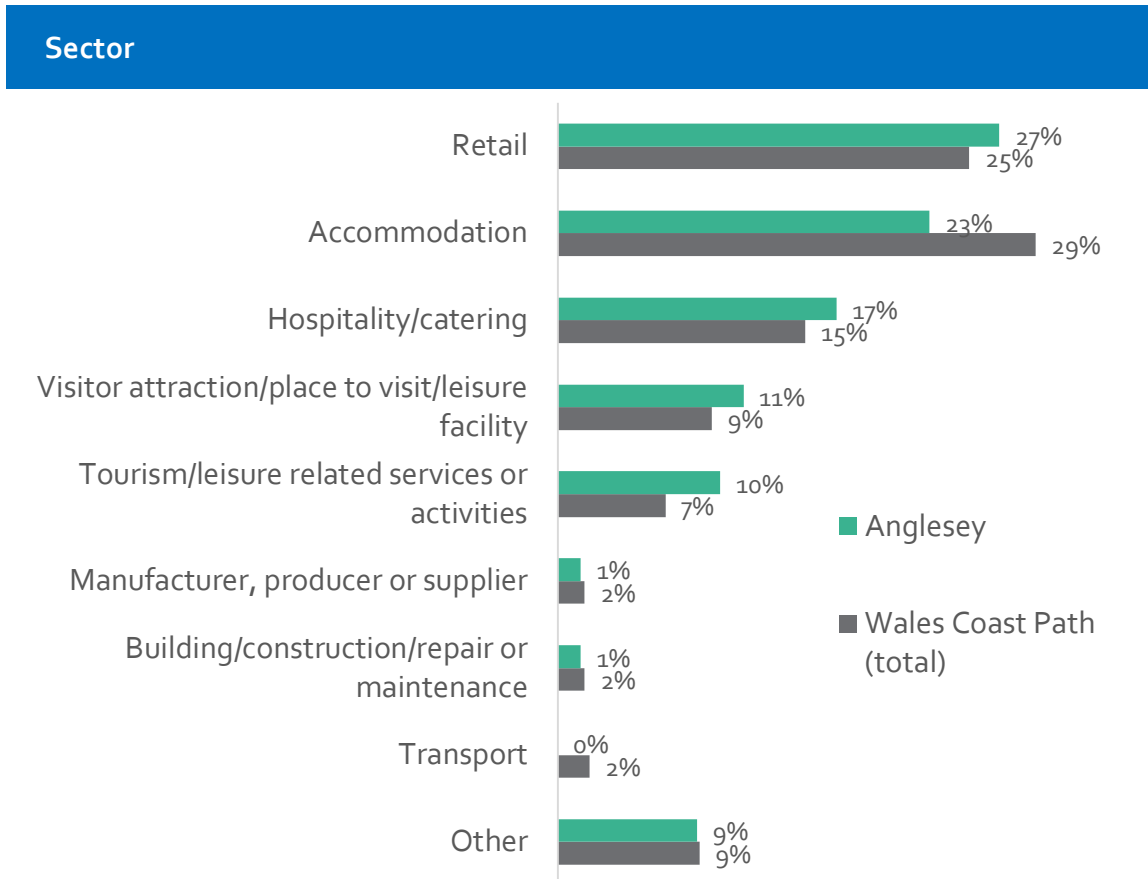
In this report, results for those based on Anglesey and assigned to the Wales Coast Path are compared to the average figures from the total sample of businesses assigned to the Wales Coast Path, regardless of business location. The combined average is labeled as "Wales Coast Path (total)" in the comparison charts. Where figures are significantly higher than the total for the Wales Coast Path nationally, a coloured arrow in the chart will show whether this is significantly higher or lower. If there is no arrow, this figure is not significantly different to the total and should be treated with some caution. Where large differences are deemed insignificant, it is likely due to the differing base size of the two samples.

Please note – the Pembrokeshire Coast Path is classified as a National Trail but also forms part of the Wales Coast Path. Throughout this report, when referring to the Wales Coast Path (total), we are referencing the Wales Coast Path including the Pembrokeshire Coast Path.

Wales Coast Path - Anglesey Business Profiles

Business profiles (I)

The 70 businesses in the Anglesey area represent a range of sectors – 50% are in the retail or accommodation sector. A further 17% work in the hospitality and catering sector. Overall, 84% of these businesses are in the private sector, with another 9% being public sector businesses.

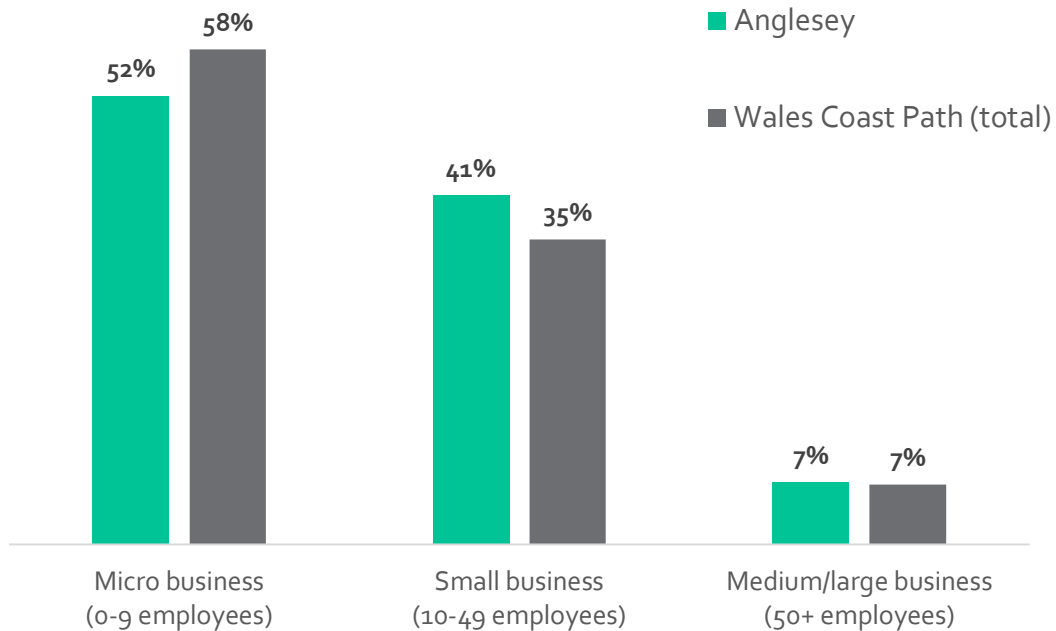


Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path (70). **Q05B.** Which of the following best summarises your main business's activities? **Co1.** Which one of the following best describes your business?

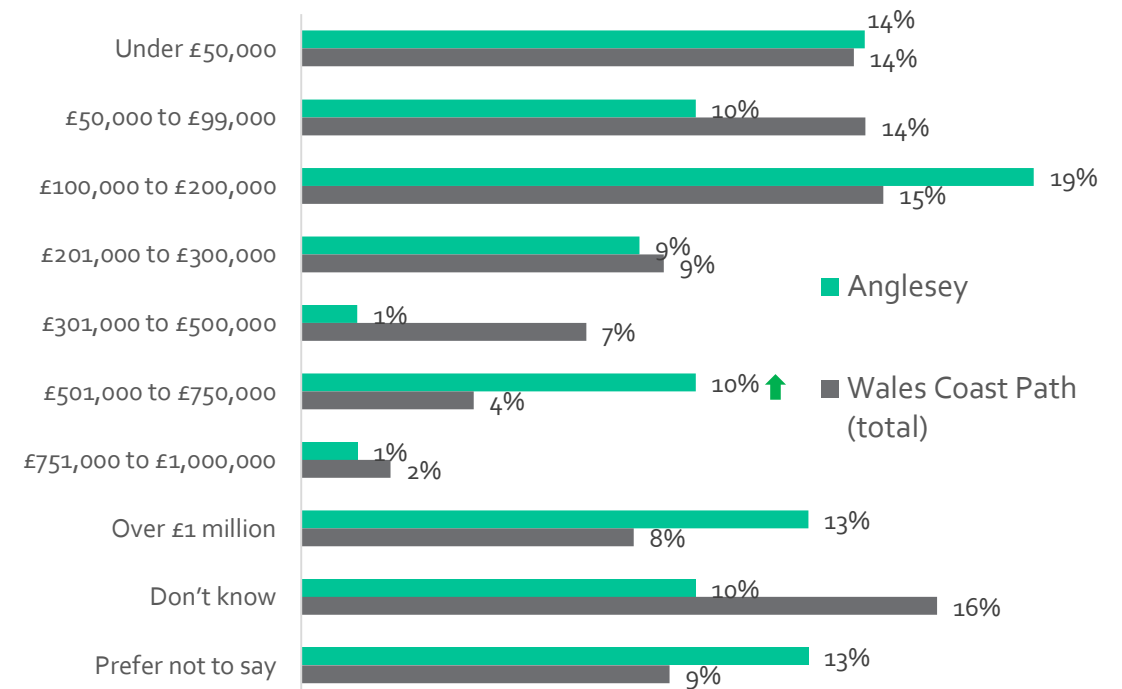
Business profiles (II)

Most of the businesses on Anglesey employ less than 50 staff members. Micro businesses with a workforce of 0-9 employees make up 52% of our sample. Another 41% are small businesses with 10-49 employees. Looking at turnover, the highest proportion – 19% - state a turnover of £100-200,000 per year. In total, 53% of businesses have a turnover of £300,000 or less.

Business size



Turnover



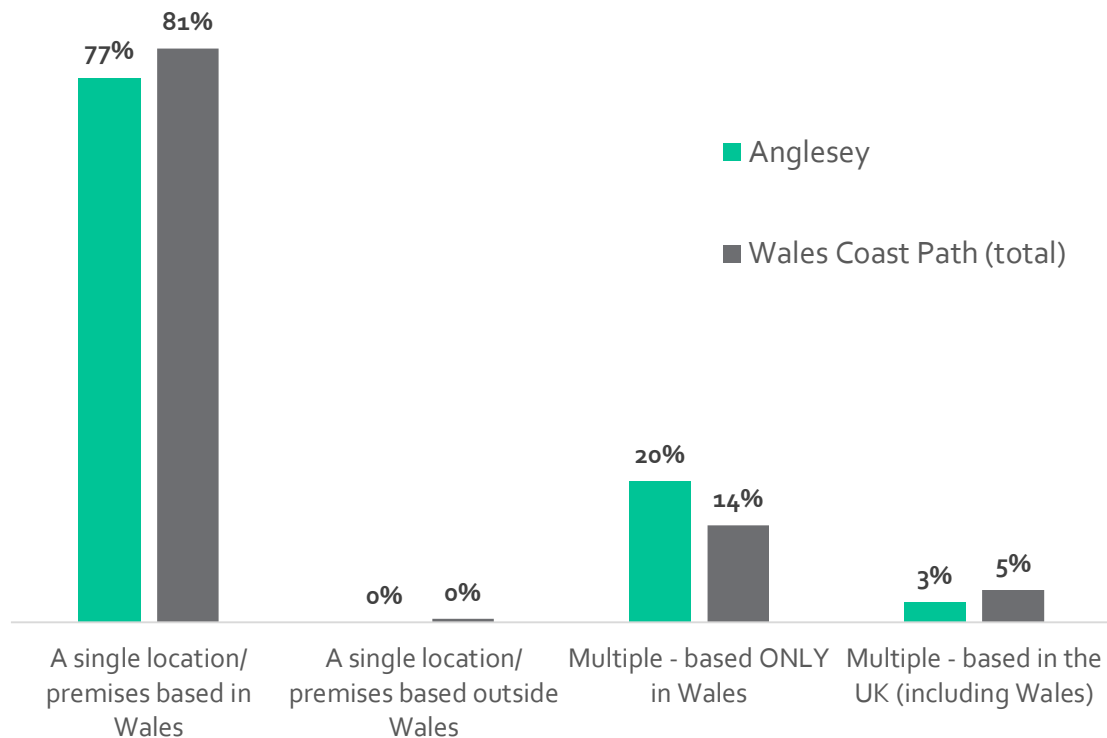
Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path (70). **Q07A/B.** Including yourself, how many permanent full and part time staff are employed by your business? **Co2.** What was the approximate turnover of your business (or sales value) in your last financial year? .

↓ ↑ Significantly higher/lower than Wales Coast Path (total)

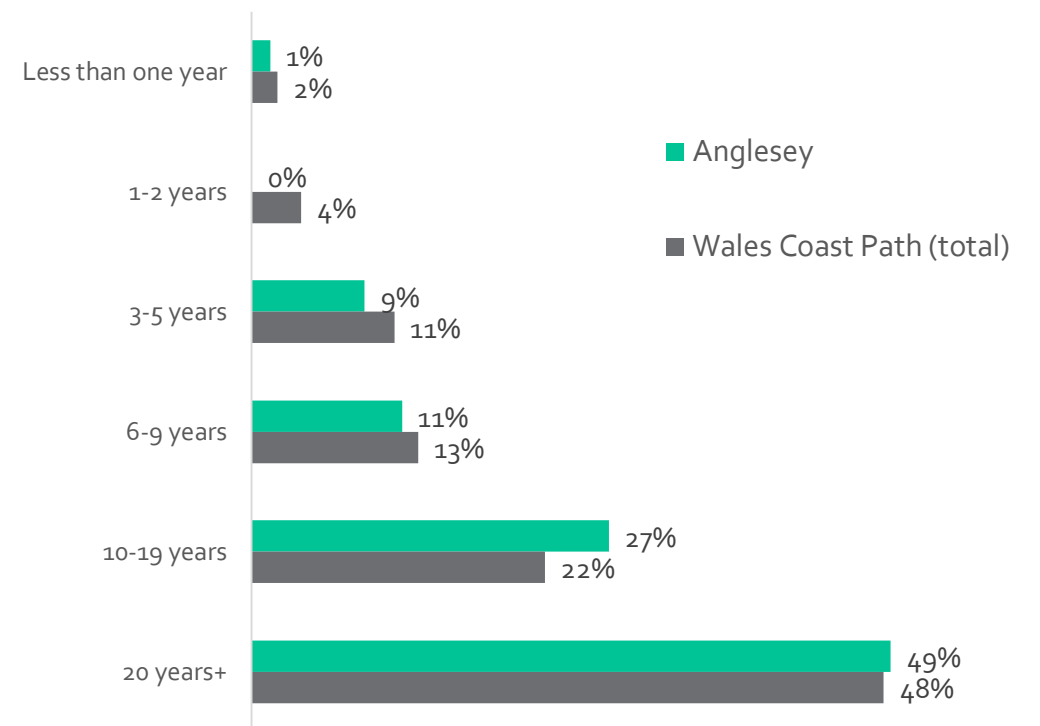
Business profiles (III)

Almost half (49%) of the businesses on Anglesey that we spoke to have been established for 20+ years, with another 27% being in operation for 10-19 years. Very few were newly established businesses. 77% of businesses we spoke to on Anglesey operate out of a single location in Wales. 20% have multiple locations across Wales.

Number of premises



Business tenure



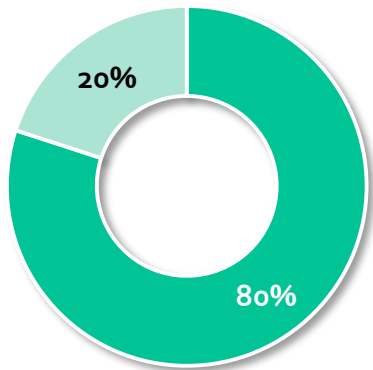
Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path (70). **Qo6.** Does your business operate from a single location or premises, or multiple locations or premises? **Co4.** Approximately how long has your business been operating from this location from?

Business profiles (IV)

80% of businesses on Anglesey are open all year round. For 39%, business is most likely to peak during the summer months. However, businesses on Anglesey are slightly more likely to report that their business is not seasonally affected compared with the average across the Wales Coast Path (33% v 27%).

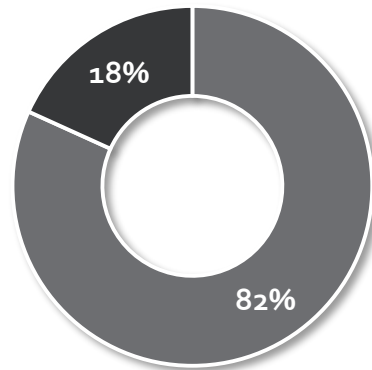
Business open all year

Anglesey



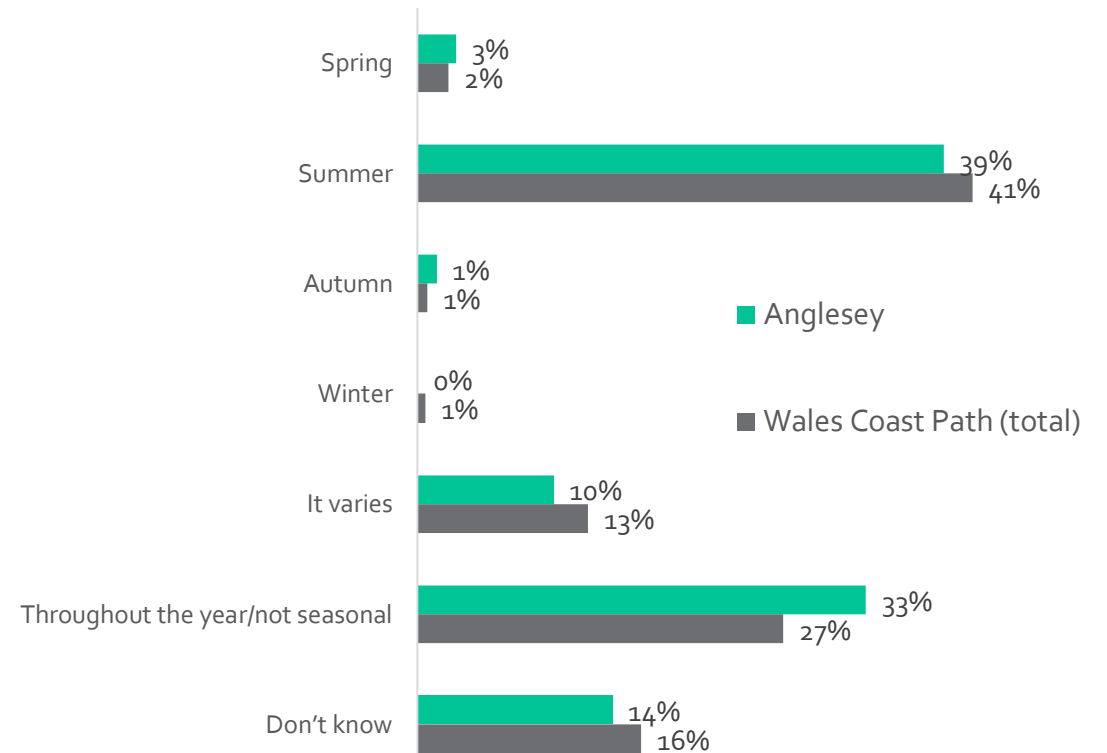
■ Yes ■ No

Wales Coast Path (total)



■ Yes ■ No

Peak season



Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path (70)). **Q09a.** is your business open all year? **Q09B.** Is there a particular season or time of year that use of your products or services peaks as a result of the Wales Coast Path?

Wales Coast Path - Anglesey

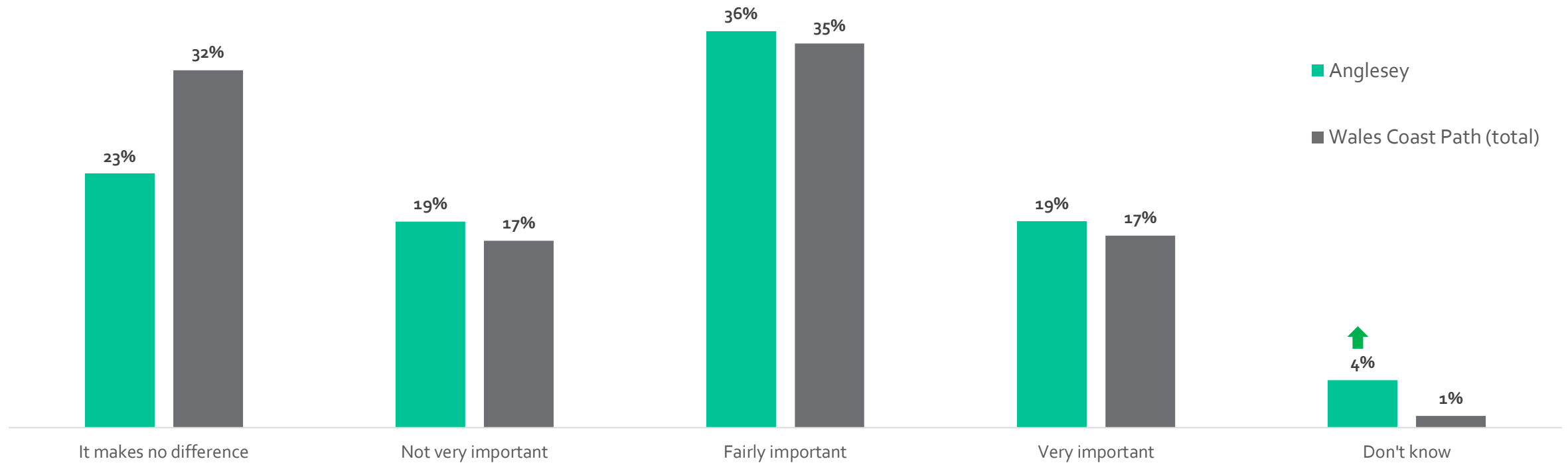
Importance of the path to business



Business profiles – path specific

55% of businesses consider the path to be fairly or very important to the success of their business, with 19% stating that it is very important. In contrast, 23% say that the path does not benefit the success of their business at all, and this is 9% points lower than the average for all businesses along the Wales Coast Path (32%).

Importance of the path to the success of businesses



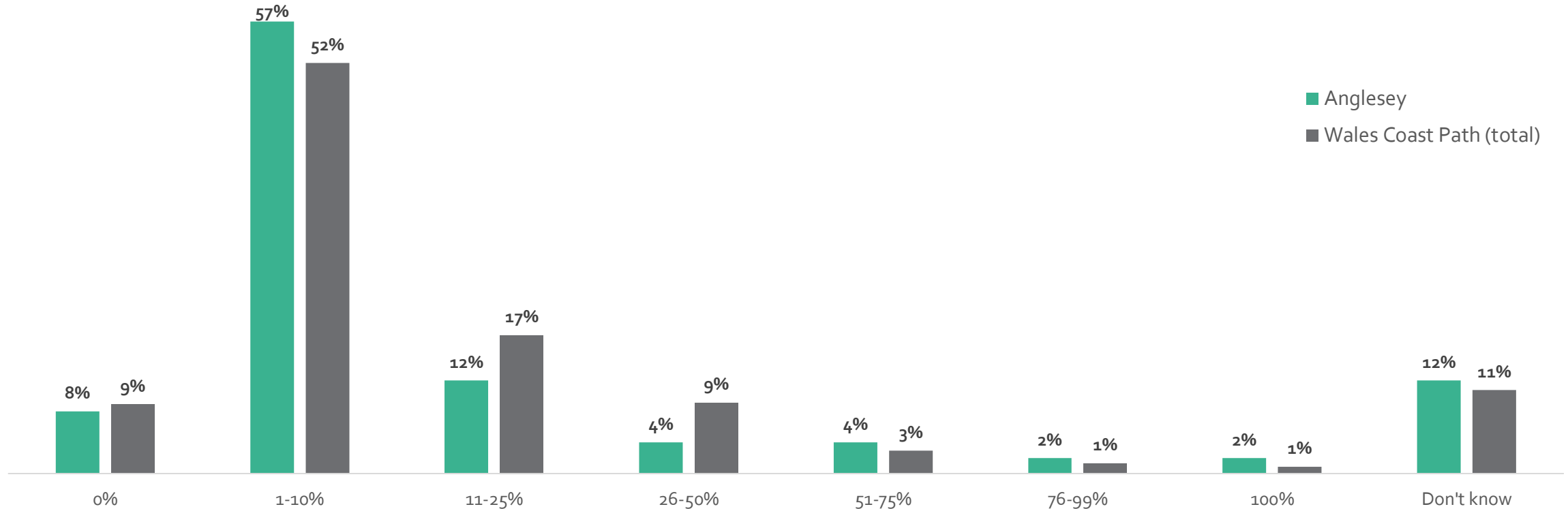
Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path) (70). **Q02.** How would you describe the importance of the path to the success of your business?

↓ ↑ Significantly higher/lower than
Wales Coast Path (total)

Business profiles – path specific

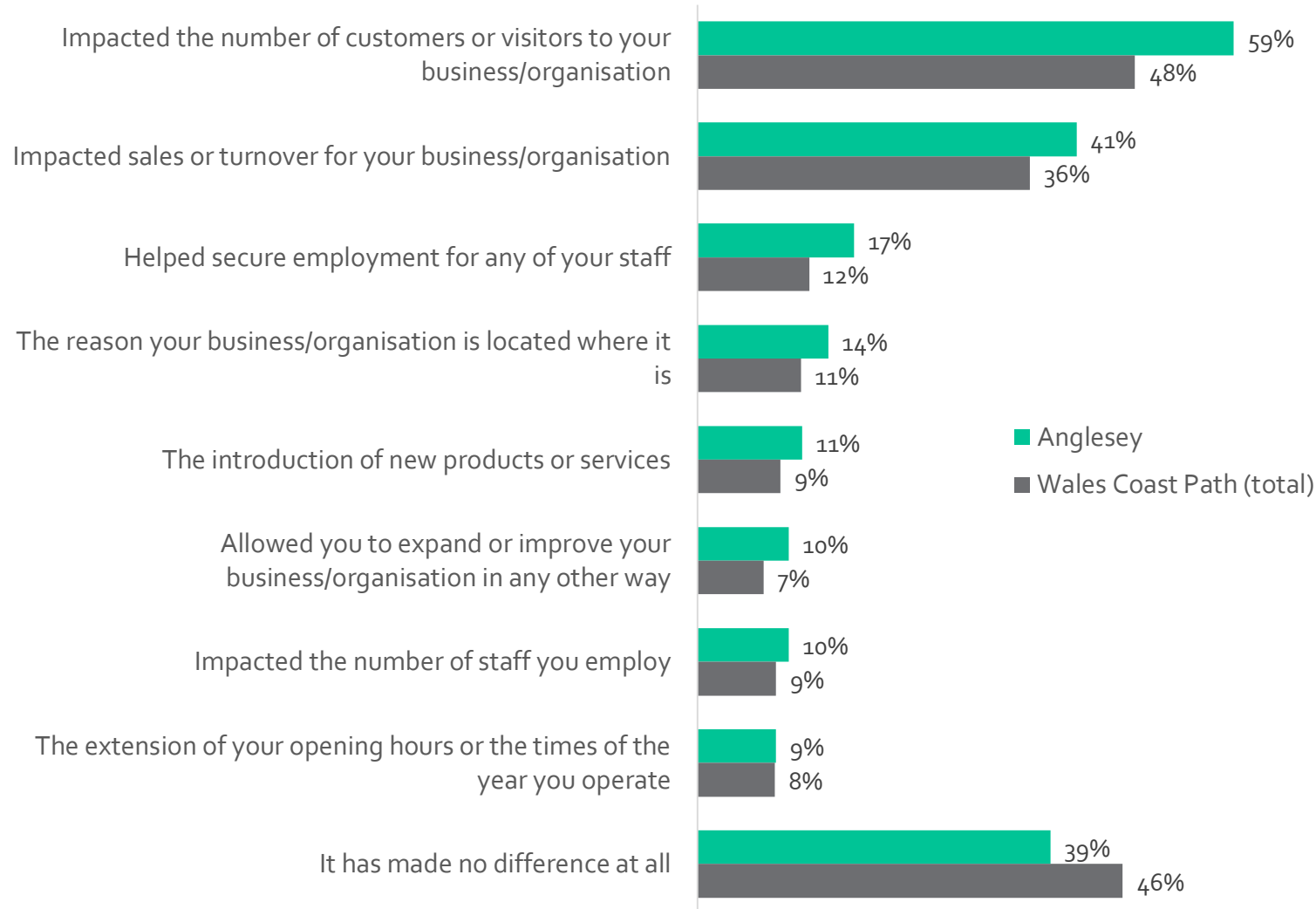
For 57% of businesses on Anglesey, the Wales Coast Path generates up to 10% of their sales/turnover. Another 16% say that the path generates 11-50% of their sales/turnover.

Percentage of sales/turnover generated by path users/existence of path



Base: All businesses assigned to the Wales Coast Path and are operating in Anglesey that indicate the path has some importance to their business (51) Q03. What percentage of your sales or turnover is generated by users of each of the following path or can be attributed to their existence in some way?

Benefit of the path to businesses



61% of businesses on Anglesey state that the path has had some benefitted on their business. This is slightly higher than the average for the Wales Coast Path nationally (54%).

In particular, 59% of businesses in Anglesey state that it has benefitted the number of customers or visitors to their business (compared to 48% for the Wales Coast Path nationally).

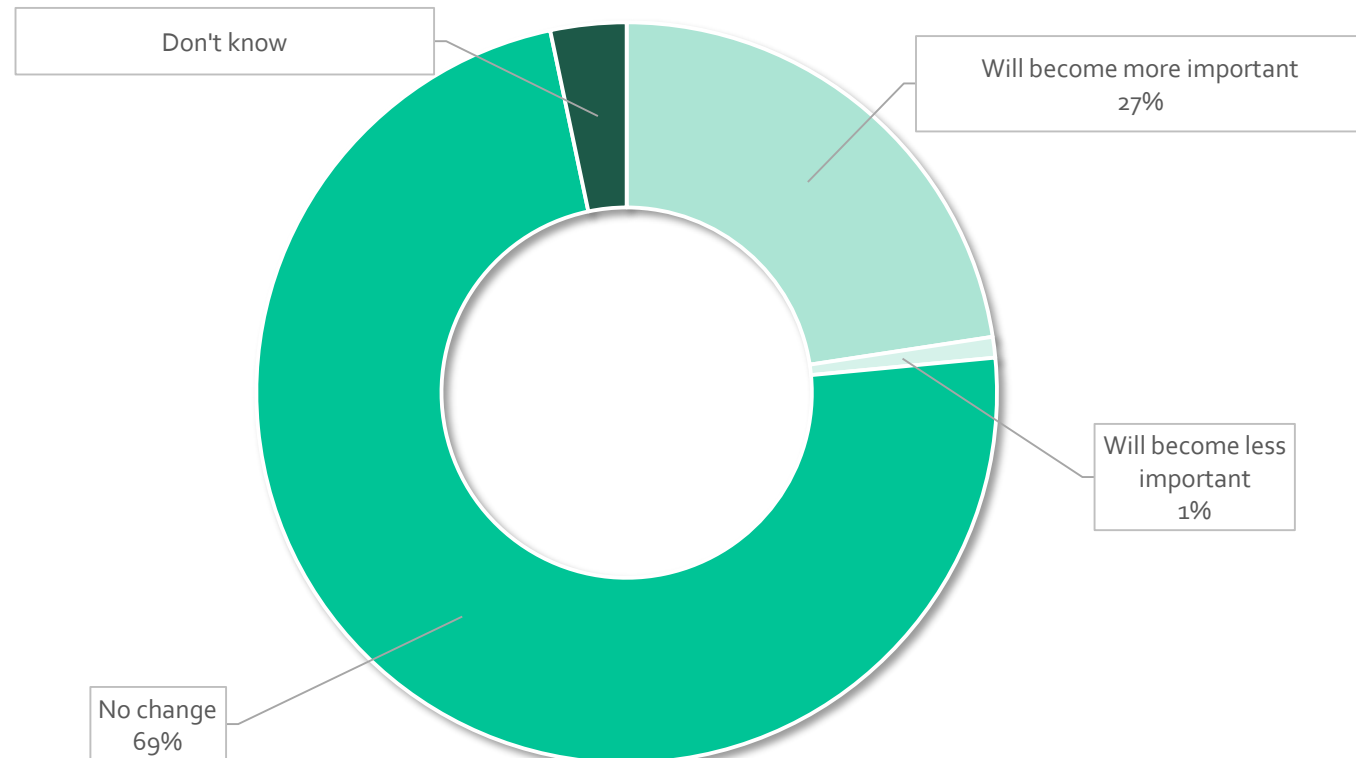
41% of Anglesey businesses agree that the presence of the Wales Coast Path has benefitted their turnover.

Additionally, 17% say that the path has helped to secure employment for any of their staffmembers.

Importance of the path to businesses

27% of businesses on Anglesey think the Wales Coast Path will become more important to their success in the future (vs. 23% on average for the Wales Coast Path in total) , mainly because of the potential increase in tourism due to path promotion.

Change in importance of the path to business success (total)



"It's a growing thing. It is a popular area of North Wales . Bird watchers love to come down - they use the path quite a bit."

"The way people come as holiday makers might change and we may have to concentrate more on walkers in the future."

"A lot of people are researching about it and Anglesey has got more popular in the last few years."

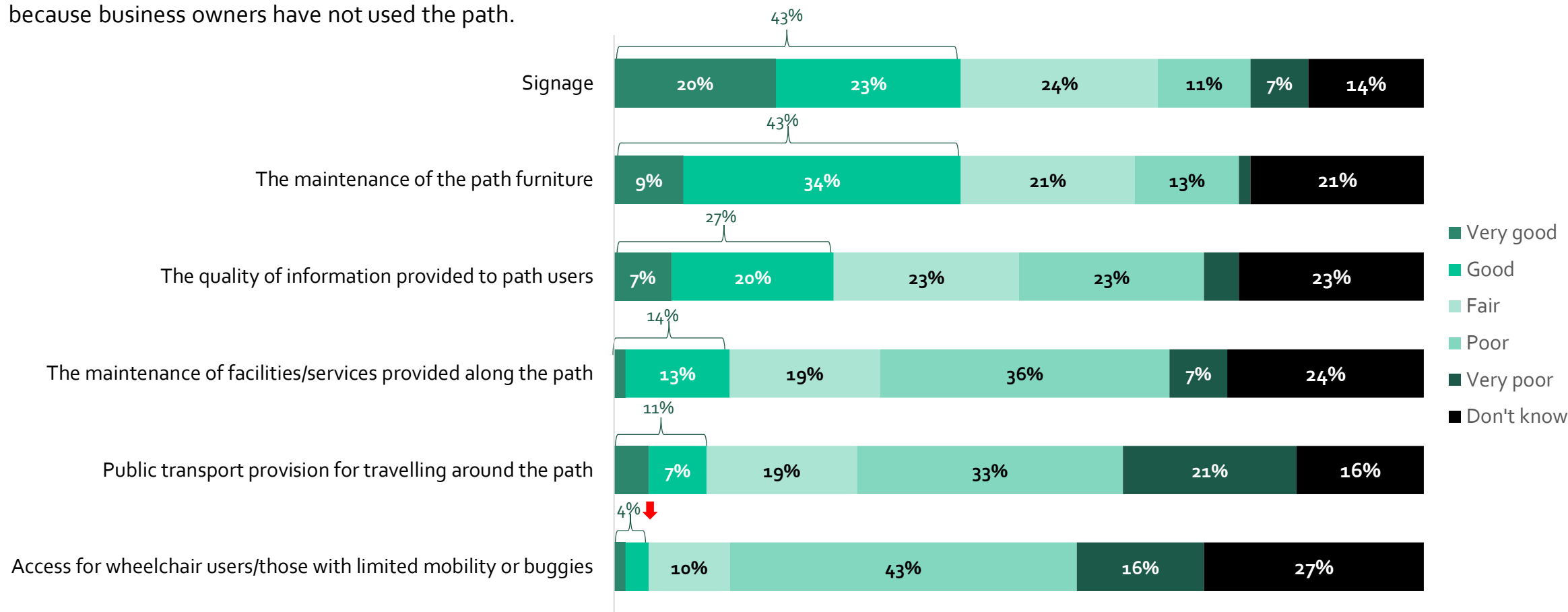
Wales Coast Path - Anglesey

Path quality



Perceptions of aspects of the path

All businesses were presented with a list of six aspects and asked to rate each one. Of all the aspects rated, businesses on Anglesey are most positive with the signage and the maintenance of the path furniture (both 43% good/very good). In contrast, they are least positive about the accessibility of the path (4% good/very good). However, we do see that 27% of businesses say that they don't know. This could be due to a lack of awareness and/or because business owners have not used the path.

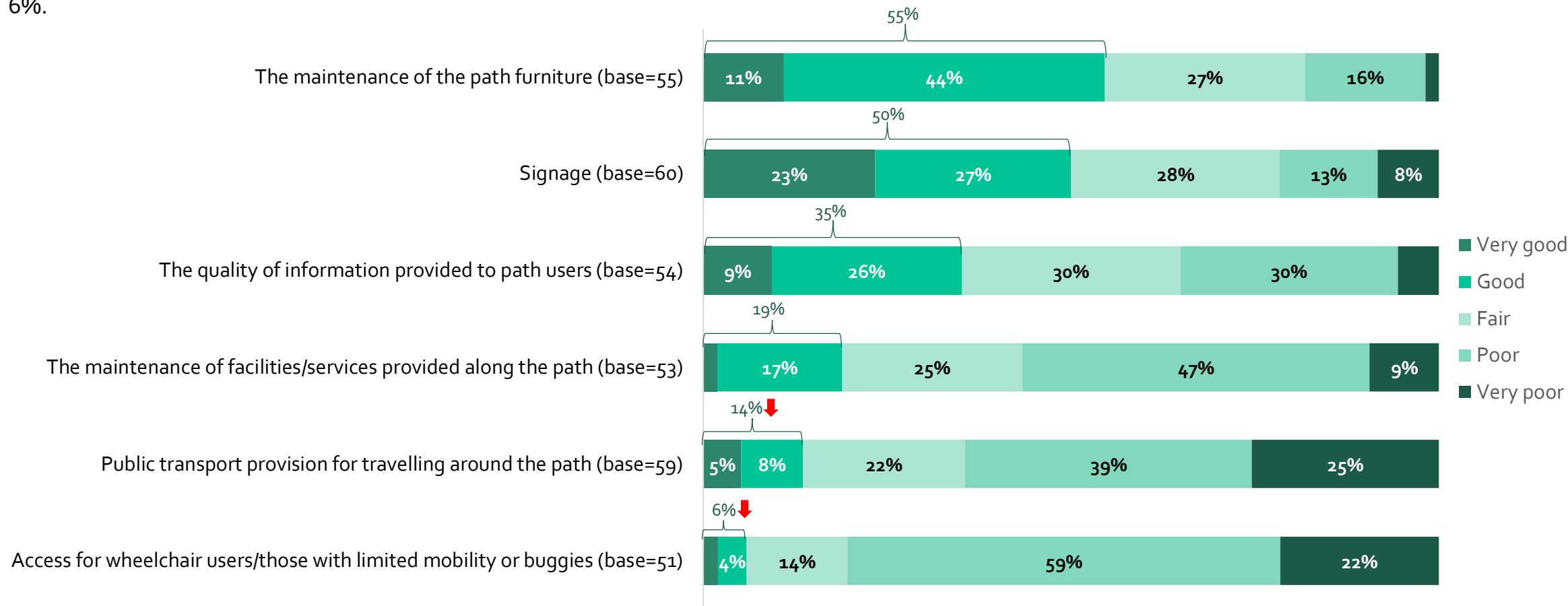


Base: All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path) (70) Q20. How would you rate each of the following aspects?
Data labels <5% not shown

↓ ↑ Significantly higher/lower than Wales Coast Path (total)

Perceptions of aspects of the path – excluding 'don't know' responses

Removing 'don't know' responses reveals a much more positive story. Of those aware, 55% give a positive rating of maintenance of the path furniture. Whilst this is still positive, this is 11% points lower than the average for the Wales Coast Path as a whole. Meanwhile, 50% say that signage is good or very good (consistent with the finding for the WCP total). Whilst positivity about accessibility is still very low, it has increased from 4% to 6%.



Base: All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path), excluding those answering 'don't know' (base varies with statement – see chart for details). **Q20.** How would you rate each of the following aspects? Data labels <5% not shown

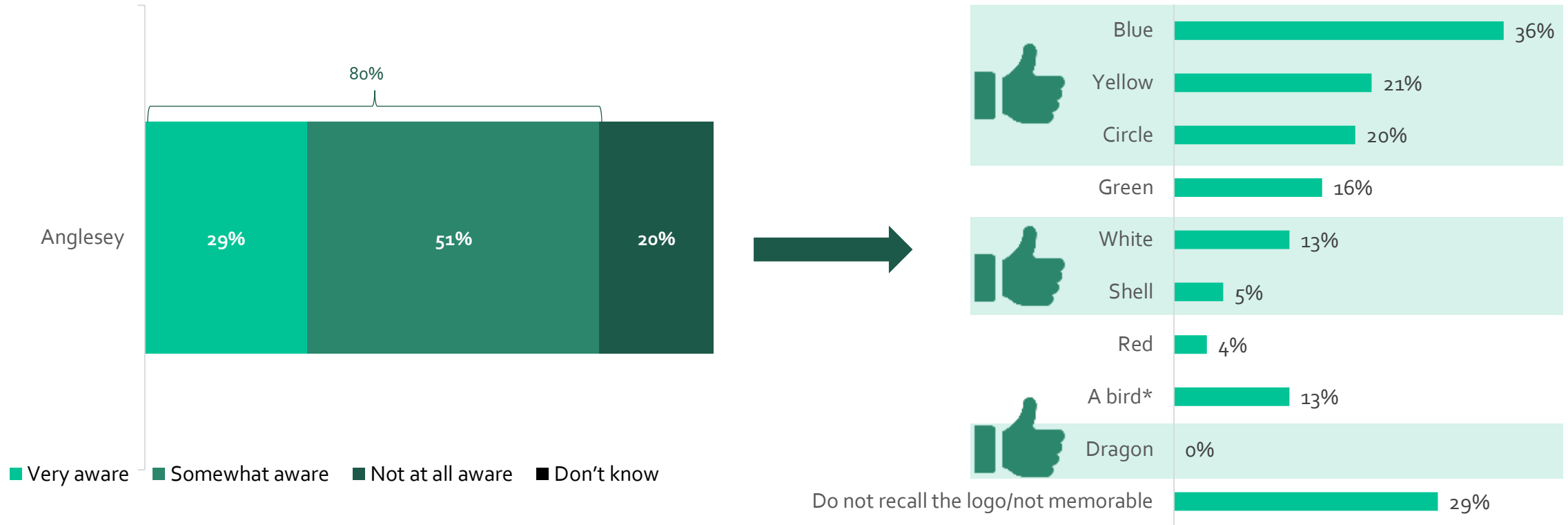
↓ ↑ Significantly higher/lower than Wales Coast Path (total)

Wales Coast Path - Anglesey Path Promotion



Branding Awareness

80% (vs. 71% on average for Wales Coast Path in total) of businesses on Anglesey have at least some awareness of the path's branding, with 29% of businesses stating they are 'very aware'. However, when those respondents were asked to describe the logo, not all got the details correct. 36% correctly stated that the logo is blue, and 21% say that it is yellow, but only 5% correctly stated that the logo represents a shell. Furthermore, 29% state that the logo is not memorable.

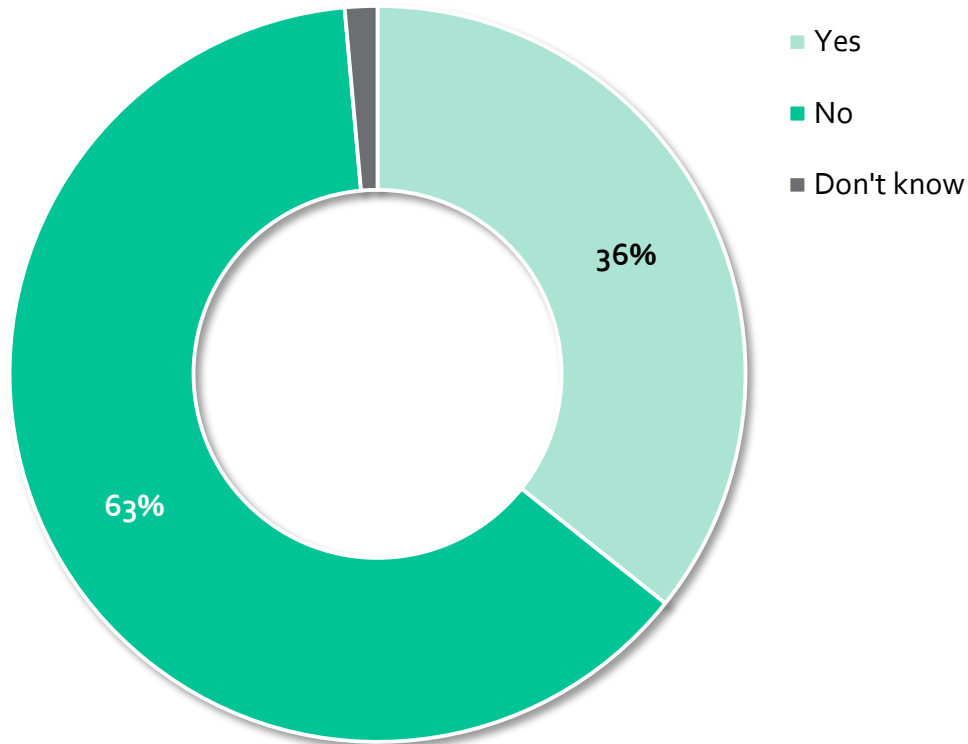


Base: All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path) (70) **Q10.** To what extent are you aware of the branding for the Wales Coast Path or how it's promoted? **Base:** All respondents who are aware of the branding for the Wales Coast Path or how it's promoted: Anglesey (56) **Q11.** How would you describe the branding (i.e. logo) of Wales Coast Path? *Note – the Anglesey Coastal Path has its own branding which features a bird on a blue background

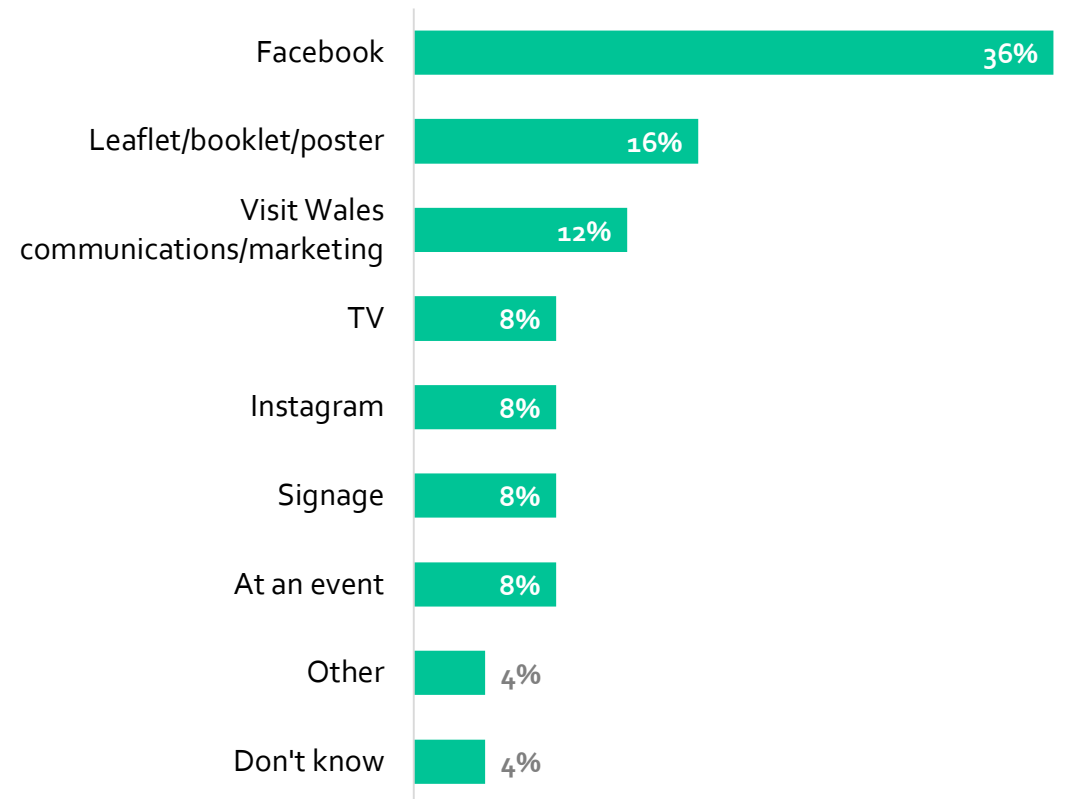
Advertising awareness

36% of Anglesey businesses have seen some publicity or advertising related to the path over the last 12 months (vs. 38% on average for Wales Coast Path in total). Of those 25 businesses who have seen advertising, 36% say they have seen this on Facebook, followed by 16% who have seen it in a leaflet, booklet or poster. Furthermore, of those businesses, the majority rate the 'effectiveness' of recent publicity to attract users as 'good'.

% seen publicity/advertising



Where publicity/advertising seen*



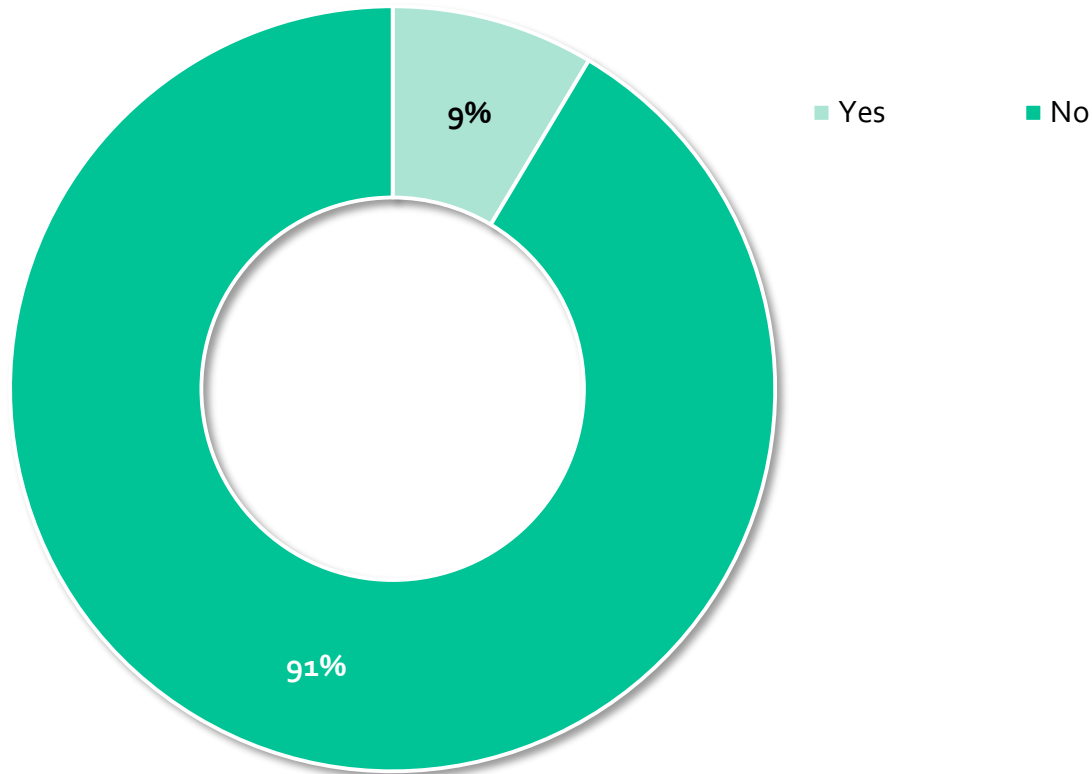
Base: All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path) (70) . **Q12.** Over the past year, have you seen or heard any publicity, advertising or information about the Wales Coast Path?

Base: All respondents who have seen or heard publicity, advertising or information: Anglesey (25)* **Q13.** Please can you tell me where or how you have seen publicity, advertising or information for the Wales Coast Path? *Note – mentions <5% not shown. *Caution: low base size

Receipt of direct communications

Just 9% of businesses (vs. 10% on average for the Wales Coast Path in total) recall having received direct communications about the Wales Coast Path in the past year

% received direct communications



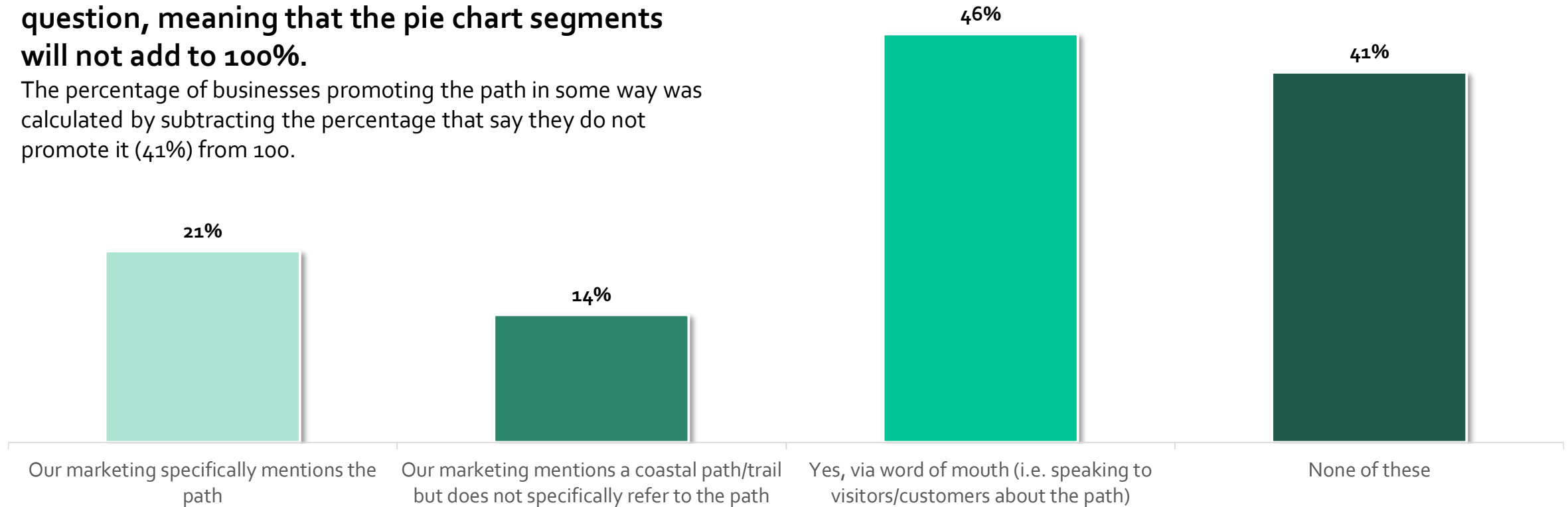
* Please note – the base size for reporting feedback on the direct communications received is too low to analyse at a regional level.

Path promotion by businesses

59% of businesses on Anglesey promote Wales Coast Path in some way (compared to 52% on average for the Wales Coast Path), with 21% stating that the path is specifically mentioned in their marketing materials (cf. 20% of WCP total). A further 46% of businesses promote the path via word-of-mouth (cf. 40% of WCP total), and 14% mention a path, but not by name (cf. 9% of WCP total).

*** Please note – this was a multiple choice question, meaning that the pie chart segments will not add to 100%.**

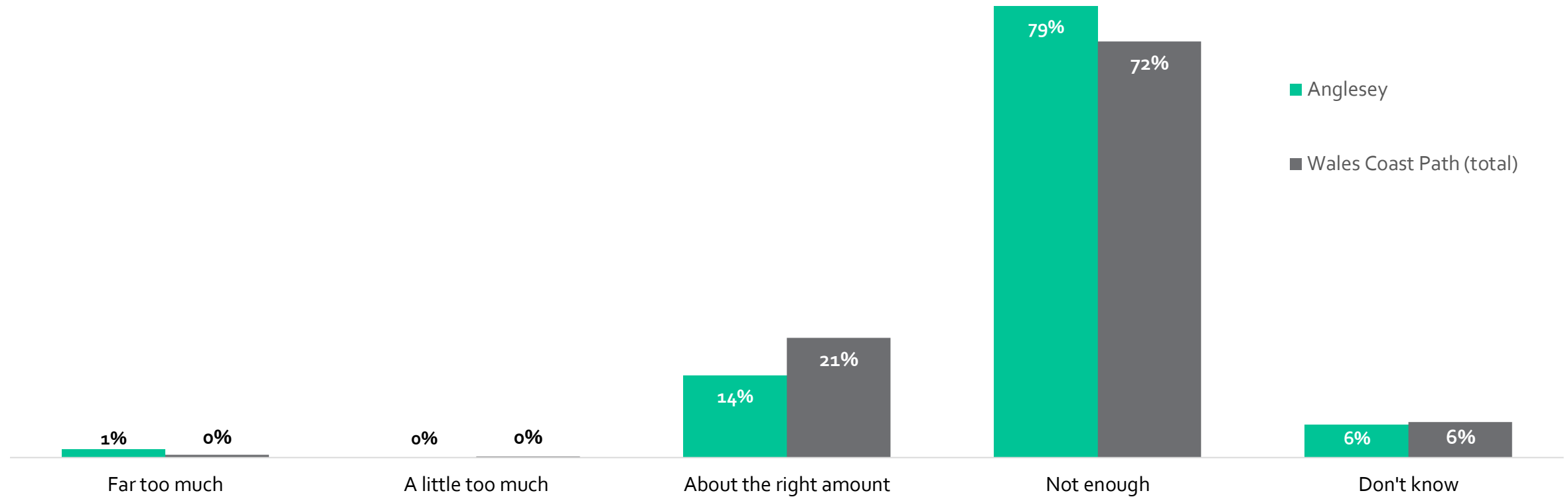
The percentage of businesses promoting the path in some way was calculated by subtracting the percentage that say they do not promote it (41%) from 100.



Path promotion

14% of businesses on Anglesey think that the Wales Coast Path is already promoted enough. This compares to 21% for all businesses along the Wales Coast Path, nationally. In comparison, 79% do not think it is promoted sufficiently.

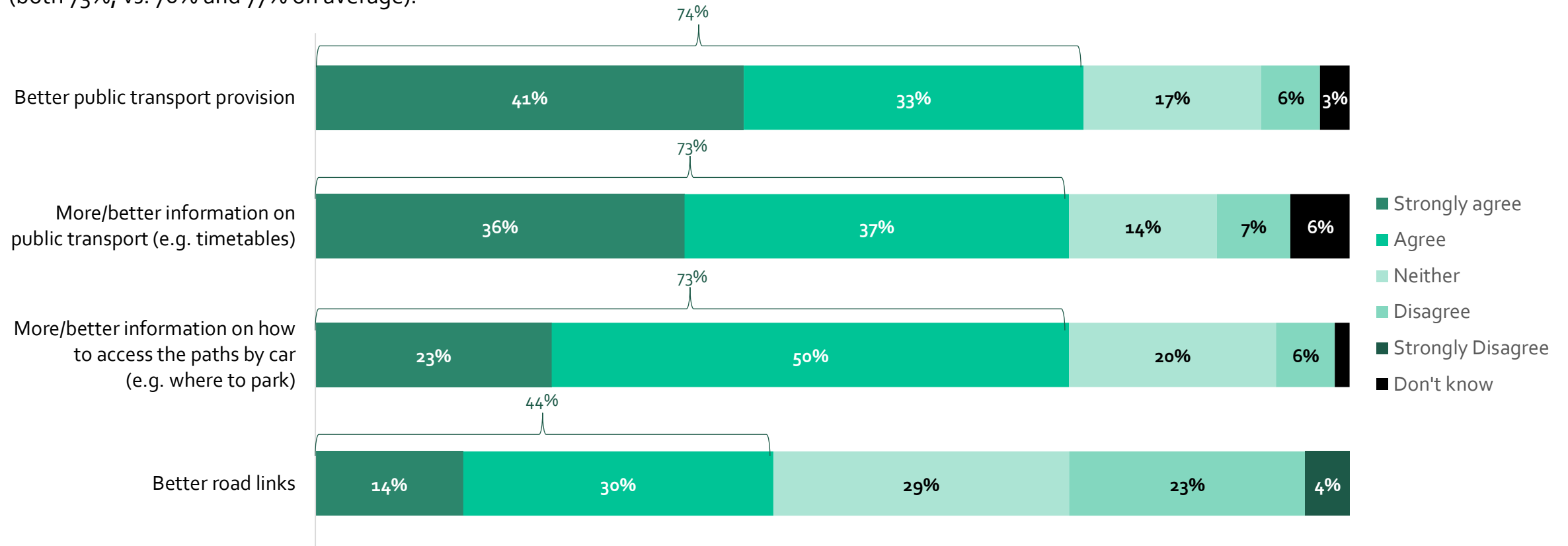
Overall, do you think the path is promoted...?



Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path (70). Q19. Overall, do you think the Wales Coast Path is promoted...?

Encouraging visits

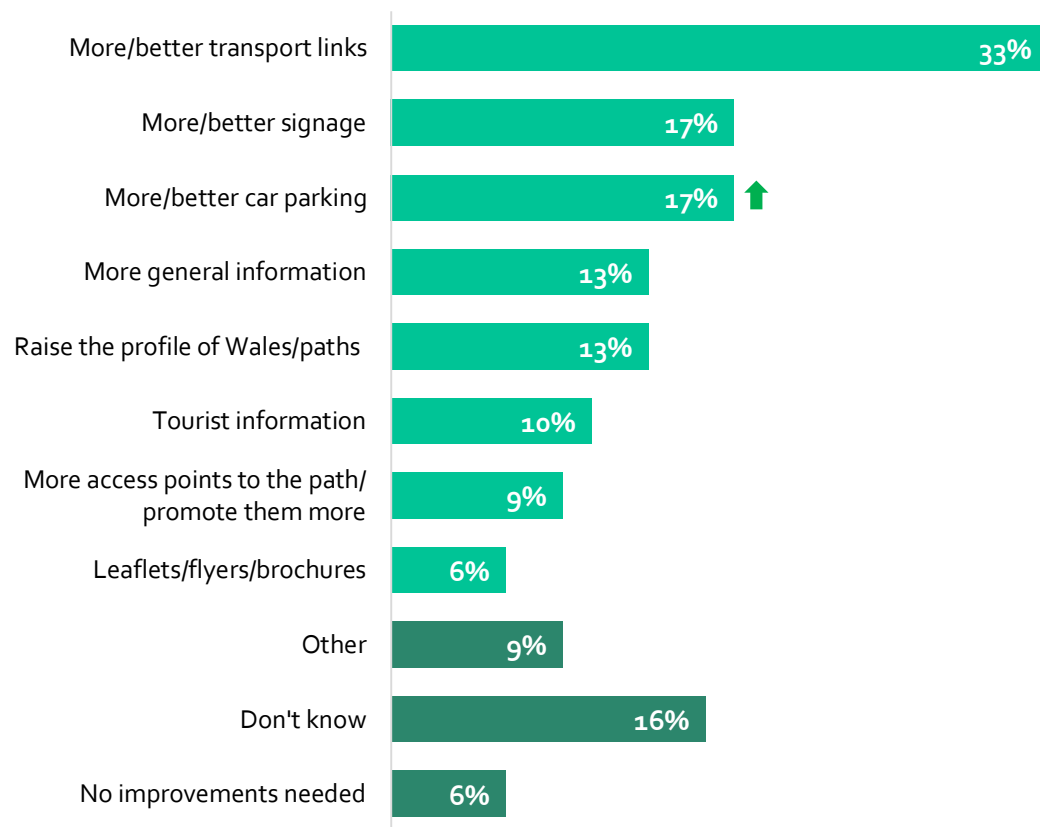
Businesses were presented with four potential improvements to the path and asked to state to what extent they agree or disagree whether they are needed. 74% of Anglesey businesses feel that better public transport is needed (consistent with the average for the Wales Coast Path in total). A similar proportion feel that more/better information on public transport, and on how to access the path by car is needed (both 73%, vs. 76% and 77% on average).



Base: All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path (70). **Q21.** To what extent, do you agree or disagree that each following are needed to encourage more people to visit the Wales Coast Path? *Note – data labels <3% not show for neatness.

Improving access

When asked in an open question what improvements are necessary to improve access, Anglesey businesses' top recommendation for Wales Coast Path is to improve transport links, with 33% making this a priority, consistent with findings for the Wales Coast Path, nationally. Additionally, 17% believe that customers/visitors could benefit from better signage and better car parking, which is 6% points higher than average (11%). Businesses on Anglesey also place more importance on improving parking than the average business along the Wales Coast Path (17% cf. 9% total).



“There needs to be more transport links and more frequency of transport. There is no Welsh tourist board for information anymore in the area and the Anglesey path is poorly signposted in Holyhead and Anglesey for the cruise ships.”

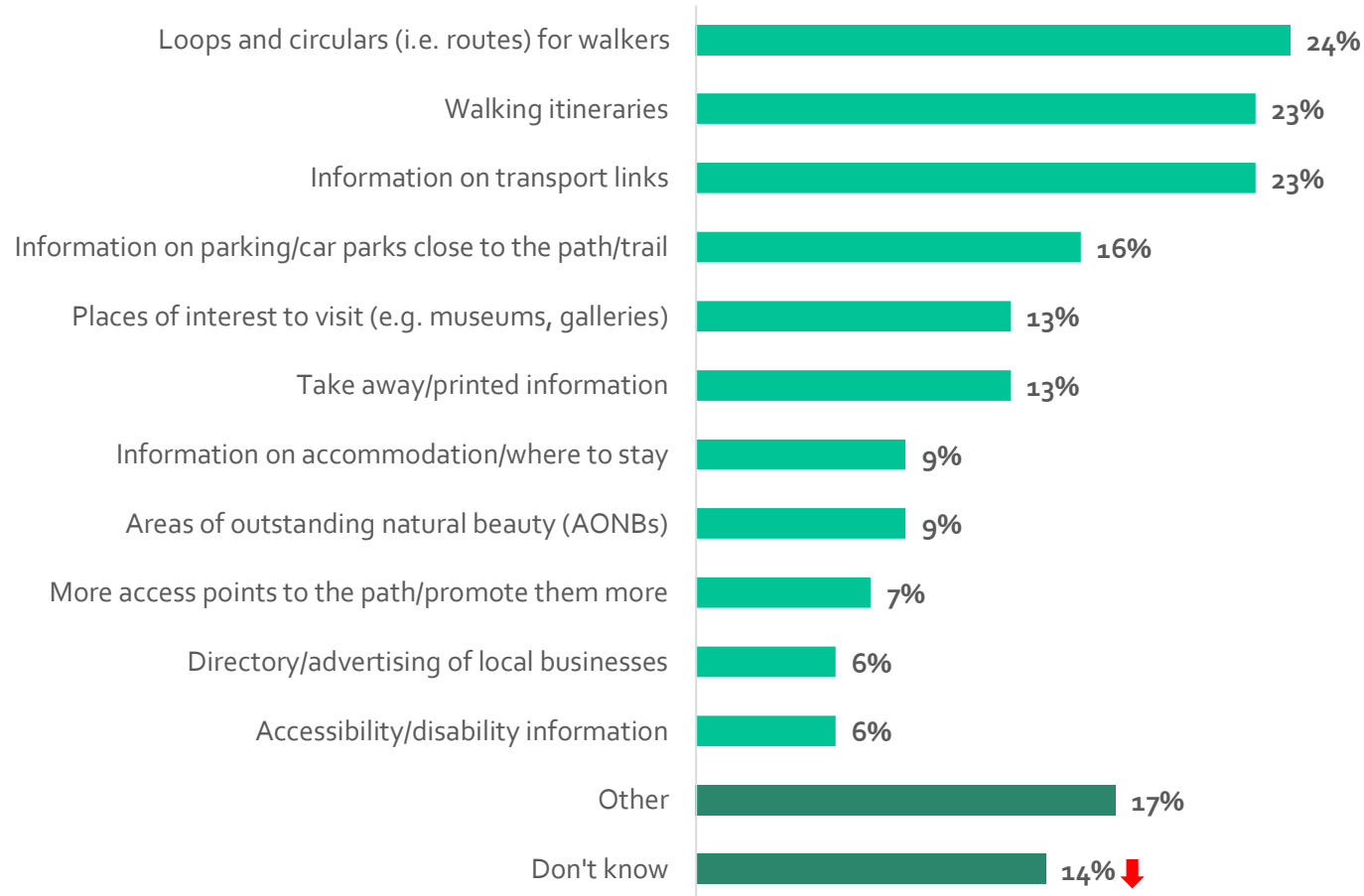
“Transport - the public transport is a joke! We get 3 buses a day, and on a Sunday, we only get one bus a day. The last bus is 5.30pm.”

“Transport is a big issue round here - not well serviced. Parking is a huge issue too. Better provision of park and ride or public transport is necessary..”

Base: All businesses located in the Anglesey visitor region (and also assigned to the Wales Coast Path (70). Q22. What improvements (if any), do you think are needed to help more customers/visitors travel around or access the paths? *note – mentions <5% not shown.

Information to support business customers/path users

The most frequently mentioned information that businesses believe that their customers would find the most beneficial relate to loops and circulars (routes) (24% cf. 20% of all businesses along the Wales Coast Path) and itineraries (23% cf. 19% of all businesses along the Wales Coast Path) for walkers.



'Other' responses

"An app with information on how long it would take/how many miles between points."

"Information about how to be mindful of the environment - pick up the litter, take their BBQs home, take their tents home, don't camp overnight in campervans on your car parking spaces."

Wales Coast Path - Anglesey

Conclusions and recommendations



Conclusions

69% of businesses on Anglesey benefit from the Wales Coast Path (cf. 39% for WCP as a whole), and 55% consider it important to their success, with 19% describing it as "very important". Additionally, 27% believe the path's importance will increase in the future.

While 80% of businesses are aware of the Wales Coast Path branding, only 5% correctly identified the logo's shell representation.

Over half of businesses are happy with the maintenance of path furniture (55% excl. don't know) and the signage of the path (50% excl. don't know). However, only 6% of businesses who were aware rated the path's accessibility as good.

Recommendations

Consider increasing targeted marketing efforts highlighting the Wales Coast Path's potential to drive tourism and revenue for businesses. Include success stories and testimonials to encourage more businesses to capitalise on the path's value.

To improve recall of the Wales Coast Path logo and increase the reach of its marketing, it may help to consistently use the logo across all marketing materials. Consider collaborating with local businesses to display it on their websites and social media channels. Interactive campaigns, like photo contests encouraging visitors to feature the logo at key landmarks, could further boost engagement and recognition.

Address accessibility issues by improving physical infrastructure and providing clear signage. Look to collaborate with local councils to prioritise projects like creating accessible entry points.

Conclusions

74% of businesses feel better public transport is needed.
33% emphasised improved transport links as a key priority. Parking and signage were also highlighted as areas for improvement.

Whilst 59% of businesses do promote the path in some way, only 21% of businesses specifically mention the Wales Coast Path in their marketing materials. Furthermore, 79% believe the path is not promoted enough.

Recommendations

Whilst improving the public transport infrastructure on Anglesey may be difficult, you may consider working with local transport operators to improve awareness of existing services by creating simple, visitor-friendly guides with timetables and routes. Encouraging local businesses to display these guides or share transport information on their websites and social media could further enhance accessibility.

To increase path promotion, utilise the business toolkits to the best of your ability, boosting advertising of these kits to increase awareness and uptake. Provide marketing tools, including logos, suggested itineraries, and promotional materials, to make it easier for businesses to integrate path promotion into their advertising.

For more information

Julie Hollingsworth, Associate Director
jhollingsworth@djsresearch.com

Clare Rapkins, Senior Research Manager
crapkins@djsresearch.com

Emily Ward, Senior Research Executive
eward@djsresearch.com



Head office: 3 Pavilion Lane, Strines,
Stockport, Cheshire, SK6 7GH

Leeds office: Regus, Office 18.09, 67 Albion Street
Pinnacle, 15th–18th Floors, Leeds, LS1 5AA

+44 (0)1663 767 857 | djsresearch.co.uk

