

Wales Coast Path – North Coast Business Survey 2024

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Wales Coast Path - North Coast

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 along the North Coast**.

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 **79 are located along the North Coast** 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 these businesses only.

For full details of the methodology, please refer to the [Wales Coast Path & National Trails Business Survey 2024 \(Overall report\)](#).

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 and are located along the North Coast and were assigned to the Wales Coast Path (79).

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

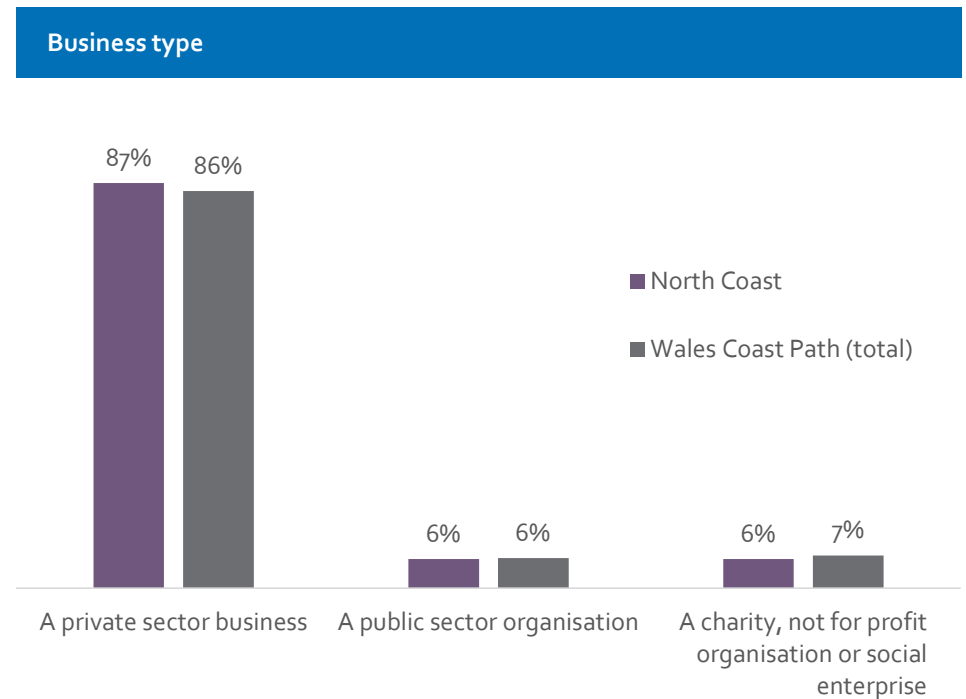
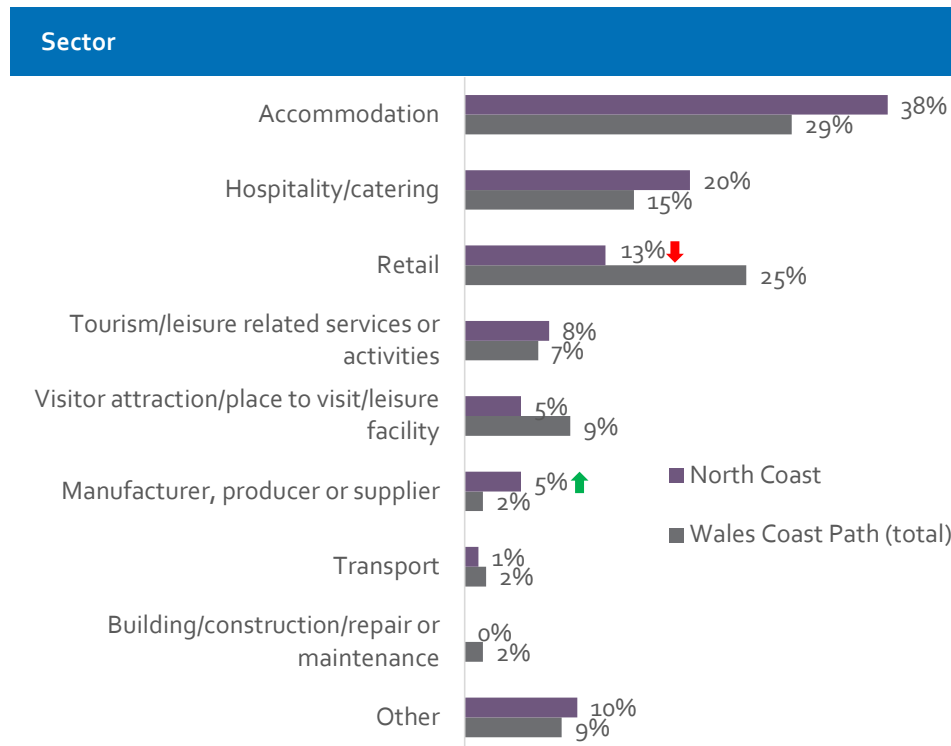
In this report, results for those based along the North Coast and assigned to the Wales Coast Path are compared to the average figures from the total sample of businesses assigned to the Wales Coast Path, regardless of business location. The combined average is labeled as "Wales Coast Path (total)" in 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 - North Coast Business Profiles

Business profiles (I)

The 79 businesses along the North Coast represent a range of sectors - 38% are in the accommodation sector and 20% in hospitality/catering sectors. A further 13% work in retail. Overall, 87% of businesses are in the private sector, with another 6% being public sector businesses.



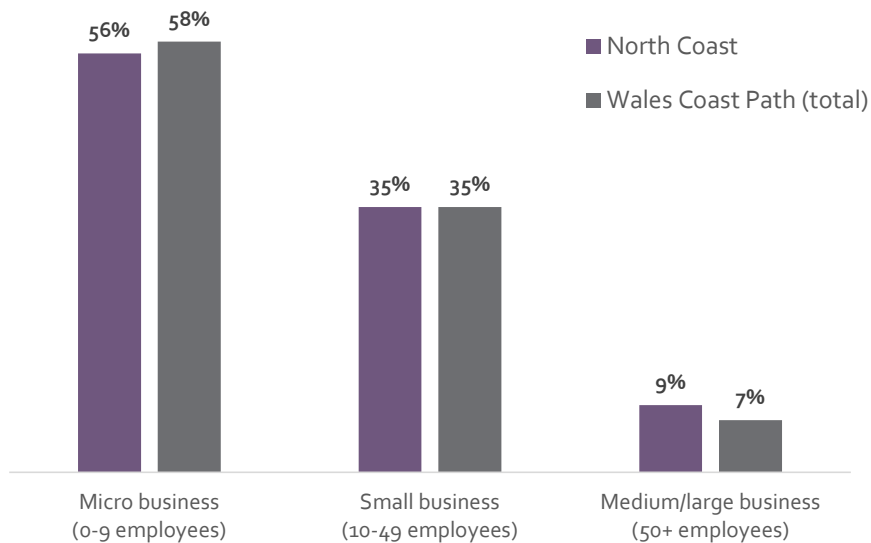
Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path including Pembrokeshire (79)). **Qo5B.** Which of the following best summarises your main business activities? **Co1.** Which one of the following best describes your business?

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

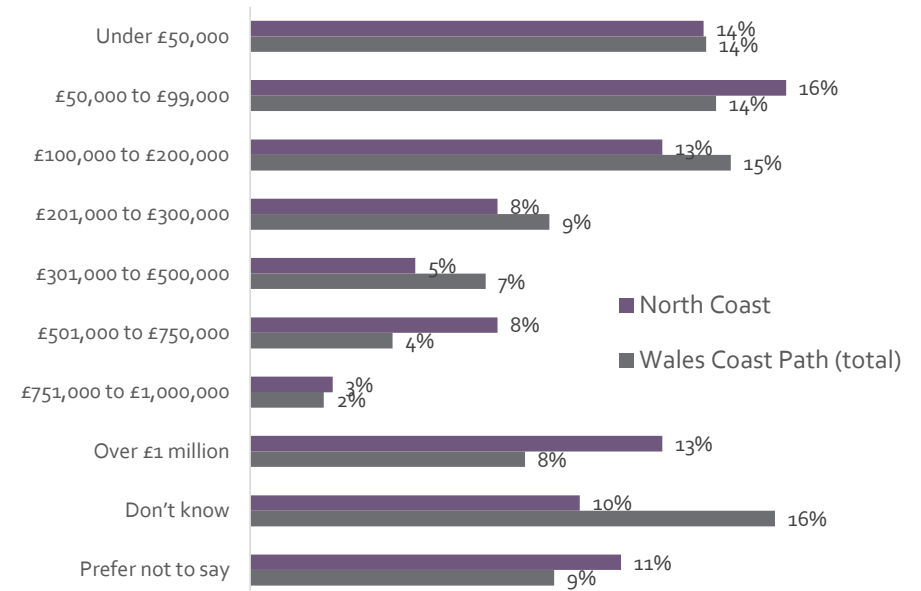
Business profiles (II)

Most of the businesses (91%) on the North Coast region employ less than 50 employees. Micro businesses with a workforce of 0-9 employees make up 56% of our sample. Another 35% are small businesses with 10-49 employees. Looking at turnover, the highest proportion – 16% - state a turnover of £50-99,000 per year. In total, 51% of businesses have a turnover of £300,000 or less.

Business size



Turnover

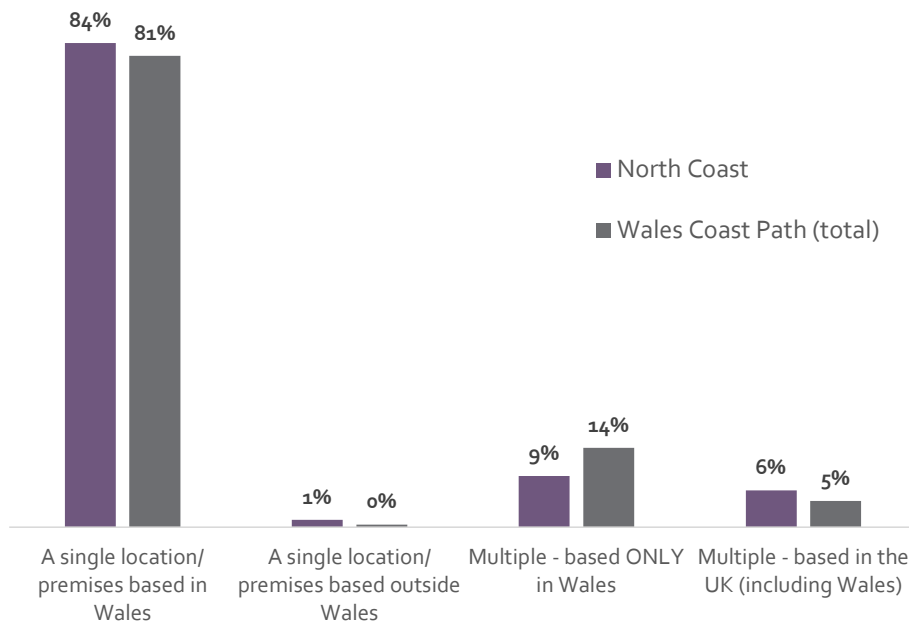


Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path)(79) **Q07A/B.** Including yourself, how many permanent full and part time staff are employed by your business? **Co2.** What was the approximate turnover of your business (or sales value) in your last financial year? .

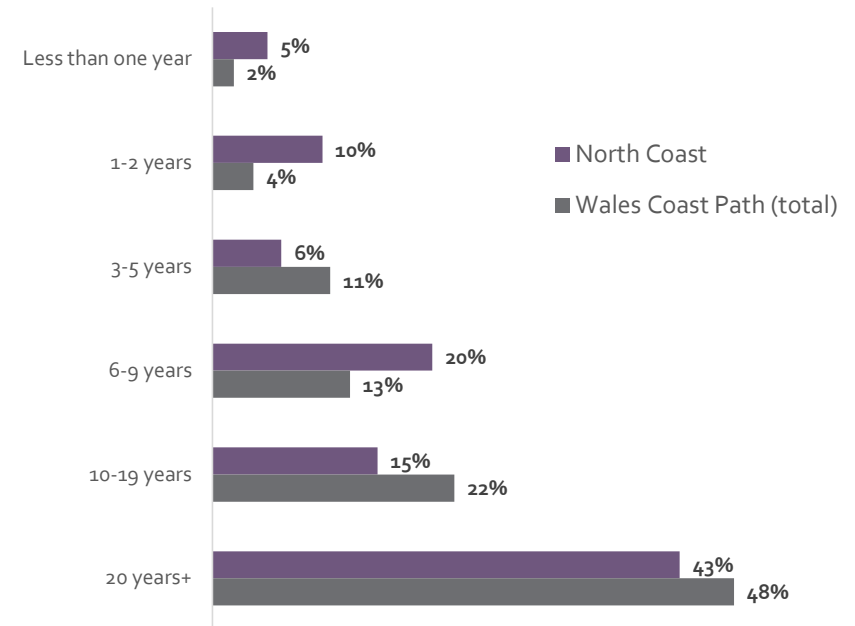
Business profiles (III)

Just less than half (43%) of the businesses along the North Coast that we spoke to have been established for 20+ years, with another 15% being in operation for 10-19 years. Very few were newly established businesses. 84% of businesses we spoke to along the North Coast operate out of a single location in Wales. 9% have multiple locations across Wales.

Number of premises



Business tenure

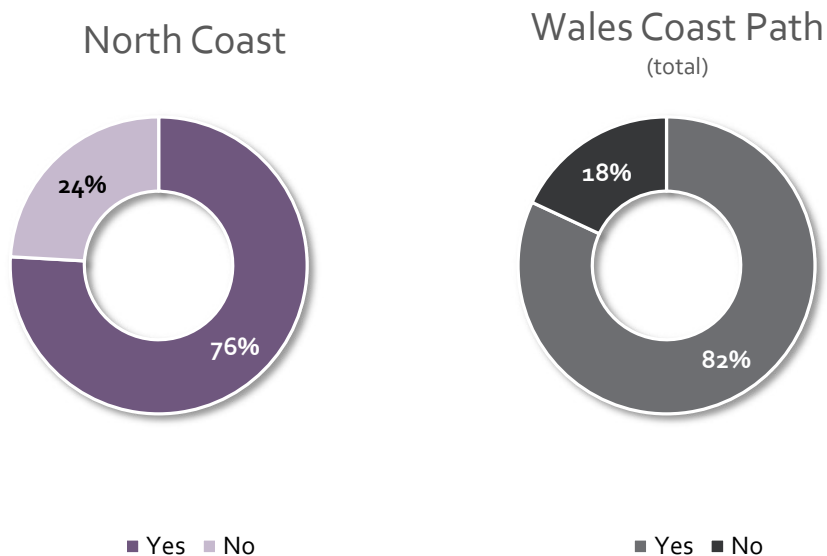


Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path)(79). **Qo6.** Does your business operate from a single location or premises, or multiple locations or premises? **Co4.** Approximately how long has your business been operating from this location from?

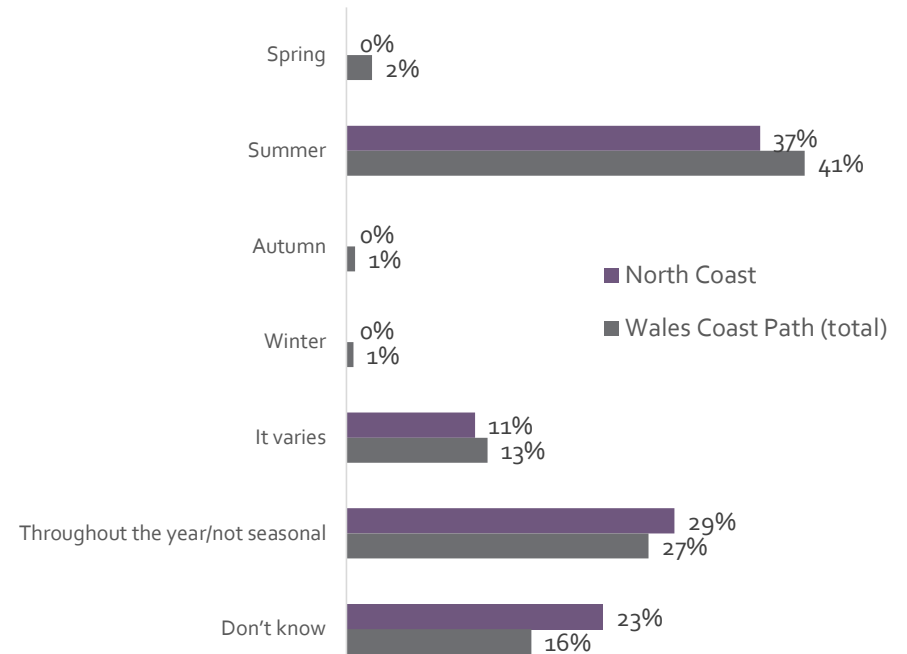
Business profiles (IV)

76% of businesses along the North Coast are open all year round. For 37%, business is most likely to peak during the summer months. However, businesses along the North Coast are slightly more likely to report that their business is not seasonally affected than compared with the average across the Wales Coast Path (29% v 27%).

Business open all year



Peak season



Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path)(79). **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 or National Trails?

Wales Coast Path - North Coast

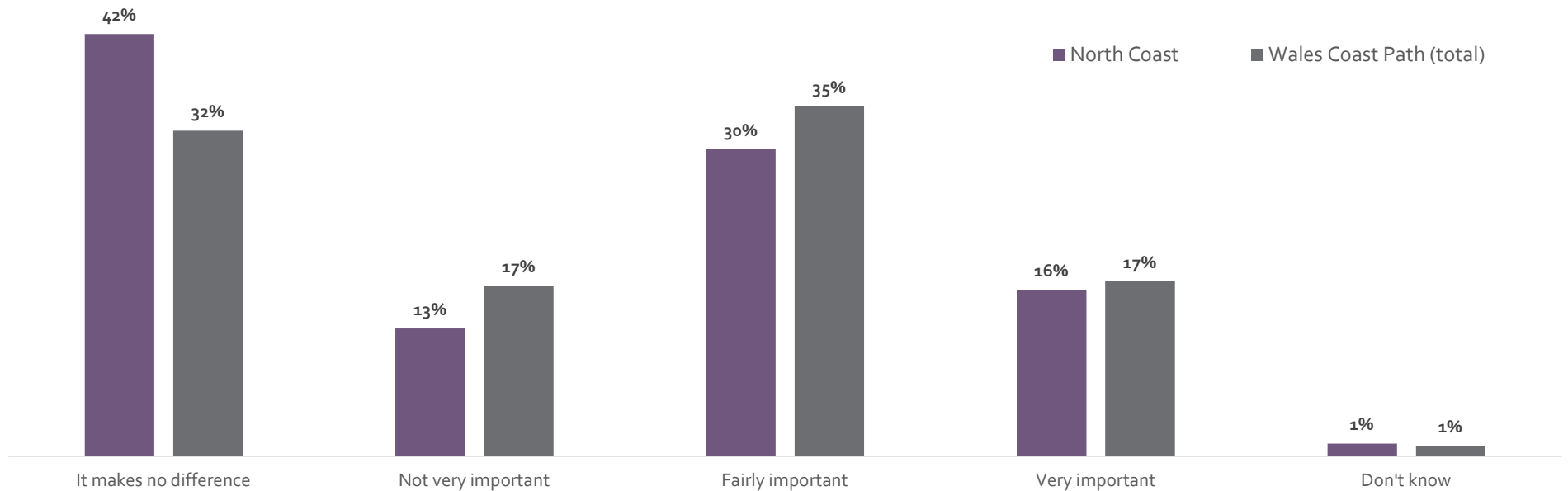
Importance of the path to business



Business profiles – path specific

46% of businesses consider the path to be fairly or very important to the success of their business, with 16% stating that it is very important. In contrast, 42% say that the path does not benefit the success of their business at all, and this is 10% points higher than the average for all businesses along the Wales Coast Path (32%).

Importance of the path to the success of businesses



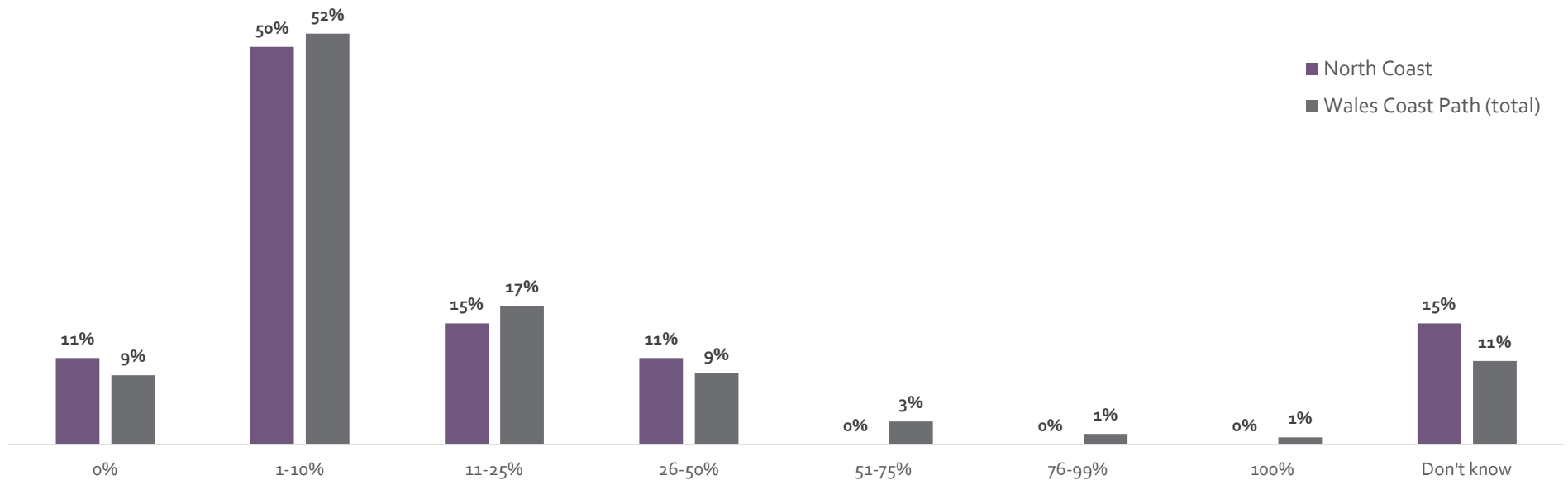
Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the North Coast visitor region (and also assigned to the Wales Coast Path (79).

Q02. How would you describe the importance of the path to the success of your business?

Business profiles – path specific

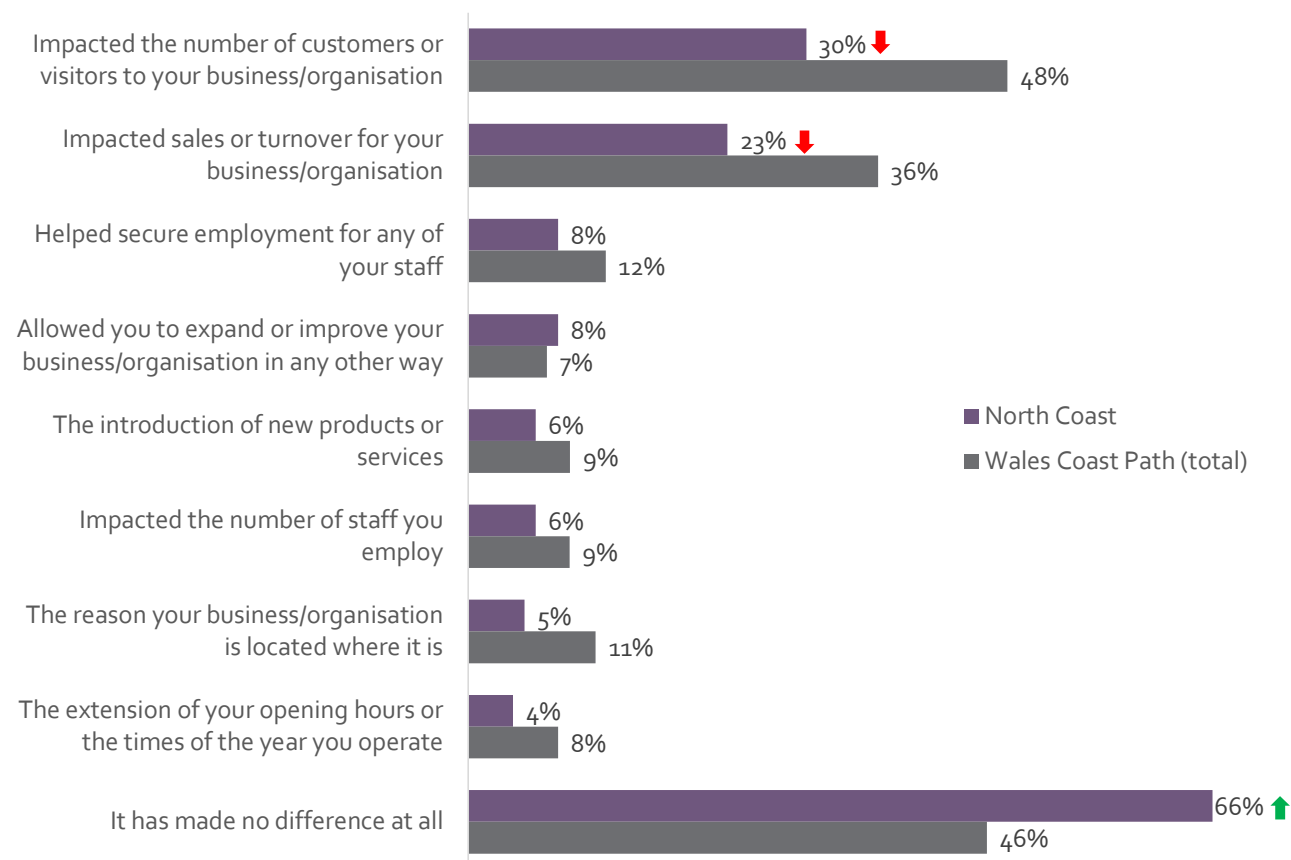
For 50% of businesses along the North Coast, the Wales Coast Path generates up to 10% of their sales/turnover. Another 26% say that the path generates 11-50% of their sales/turnover.

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



Base: All businesses assigned to the Wales Coast Path and are operating in the North Coast that indicate the path has some importance to their business (46) Q03. What percentage of your sales or turnover is generated by users of the path or can be attributed to its existence in some way?

Benefits of the path to businesses



30% of businesses along the North Coast agree that the presence of the Wales Coast path has increased the number of visitors to their business, with another 23% stating that it has benefitted their turnover. The prevalence of both benefits along the North Coast are significantly lower than the proportion of businesses sighting the same along the Wales Coast Path, nationally.

In fact, for 66% of businesses here, the presence of the path has made no difference. This is significantly higher than the Wales Coast Path average (46%).

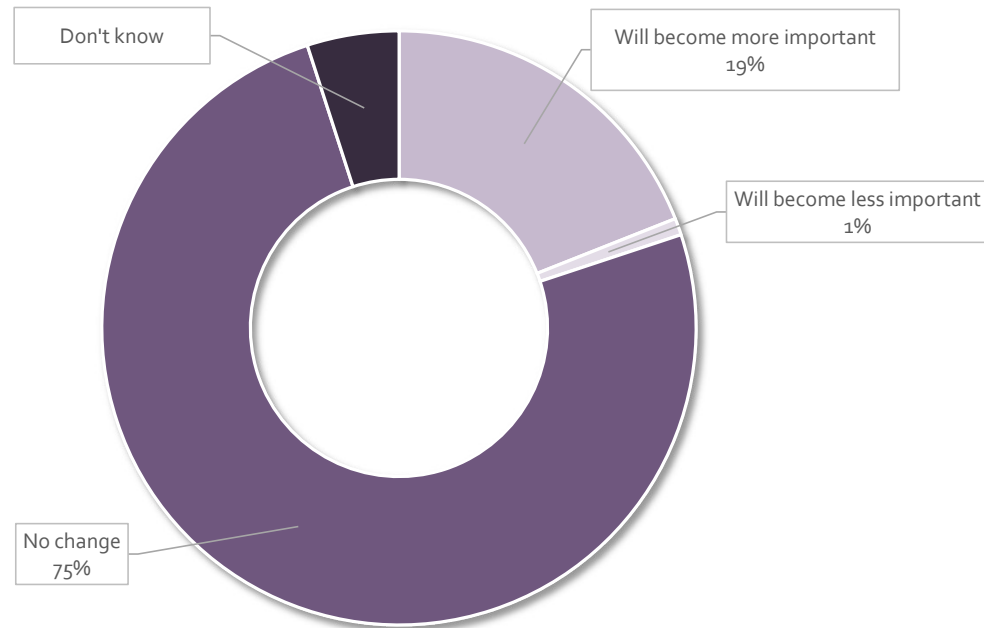
Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path) (79) Q24a. Do you think the presence of the Wales Coast Path has resulted in or contributed to any of the following for your business?

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

Importance of the path to businesses

19% of businesses along the North Coast 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). This is mainly because of the potential increase in tourism due to path promotion and more people visiting or staying in the area. Yet, 75% expect no change in the future.

Change in importance of the path to business success



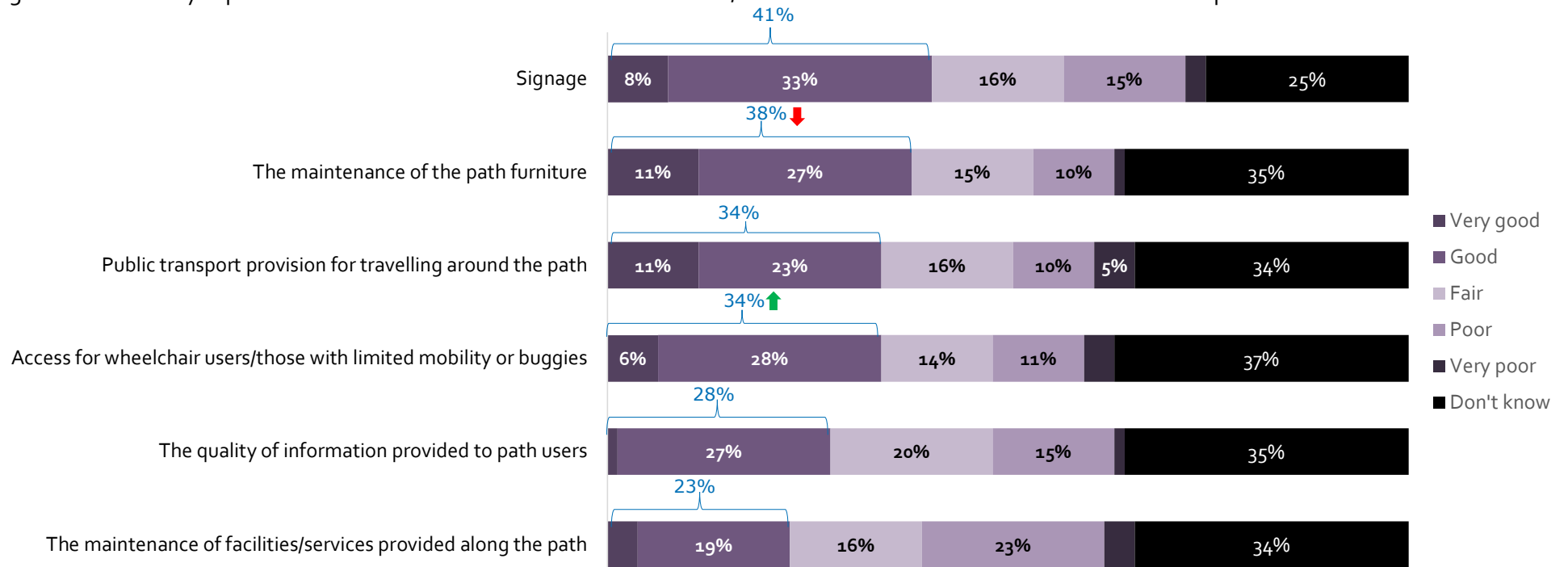
Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path)(79) **Q25a.** Do you consider that in the future there will be any change in the importance of the Wales Coast Path to the success of your business? **Base:** Where path will become more important (16) **Q25b.** Why is that?

Wales Coast Path - North Coast

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 are most positive with signage (41% good/very good) and the maintenance of the path furniture (38% good/very good). They are least positive about the maintenance of facilities or services along the path (23% good/very good). However, a significant proportion of businesses (25-37%) did not give a score to any aspect. This could be due to a lack of awareness and/or because business owners have not used the path.

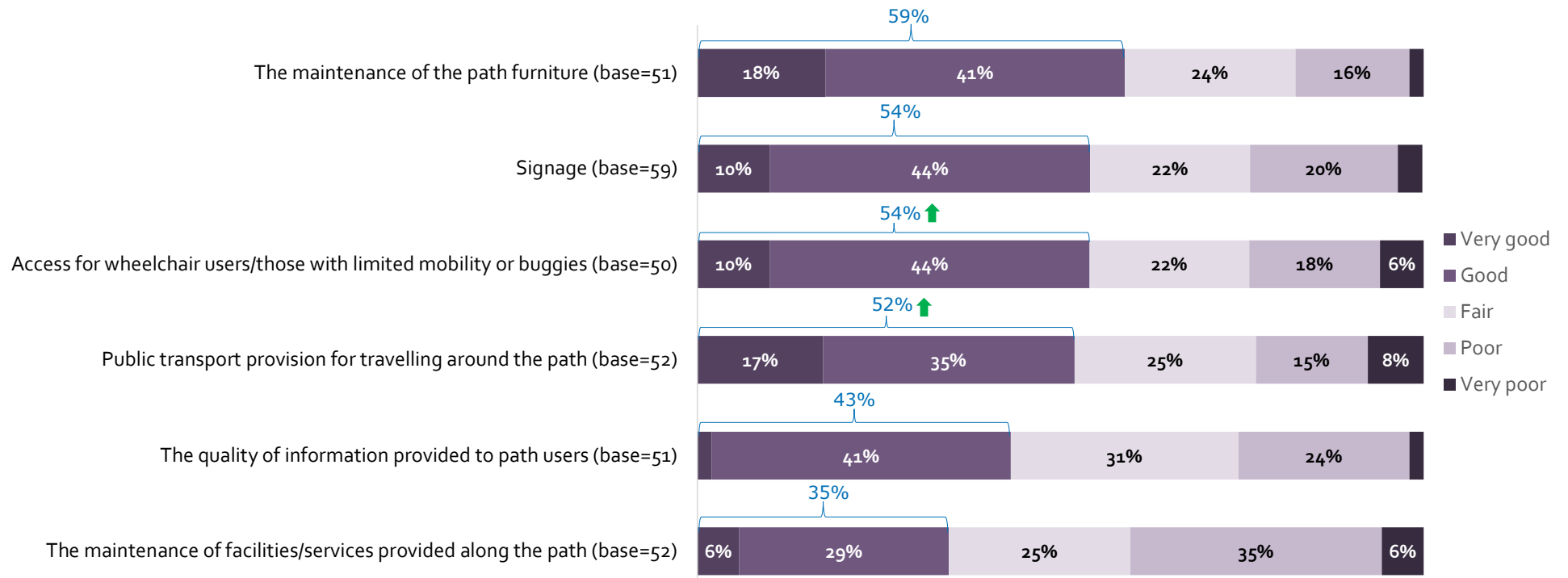


Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path)(79) Q20. How would you rate each of the following aspects?
Data labels <5% not shown

Significantly higher/lower than Wales Coast Path (total)

Perceptions of aspects of the path

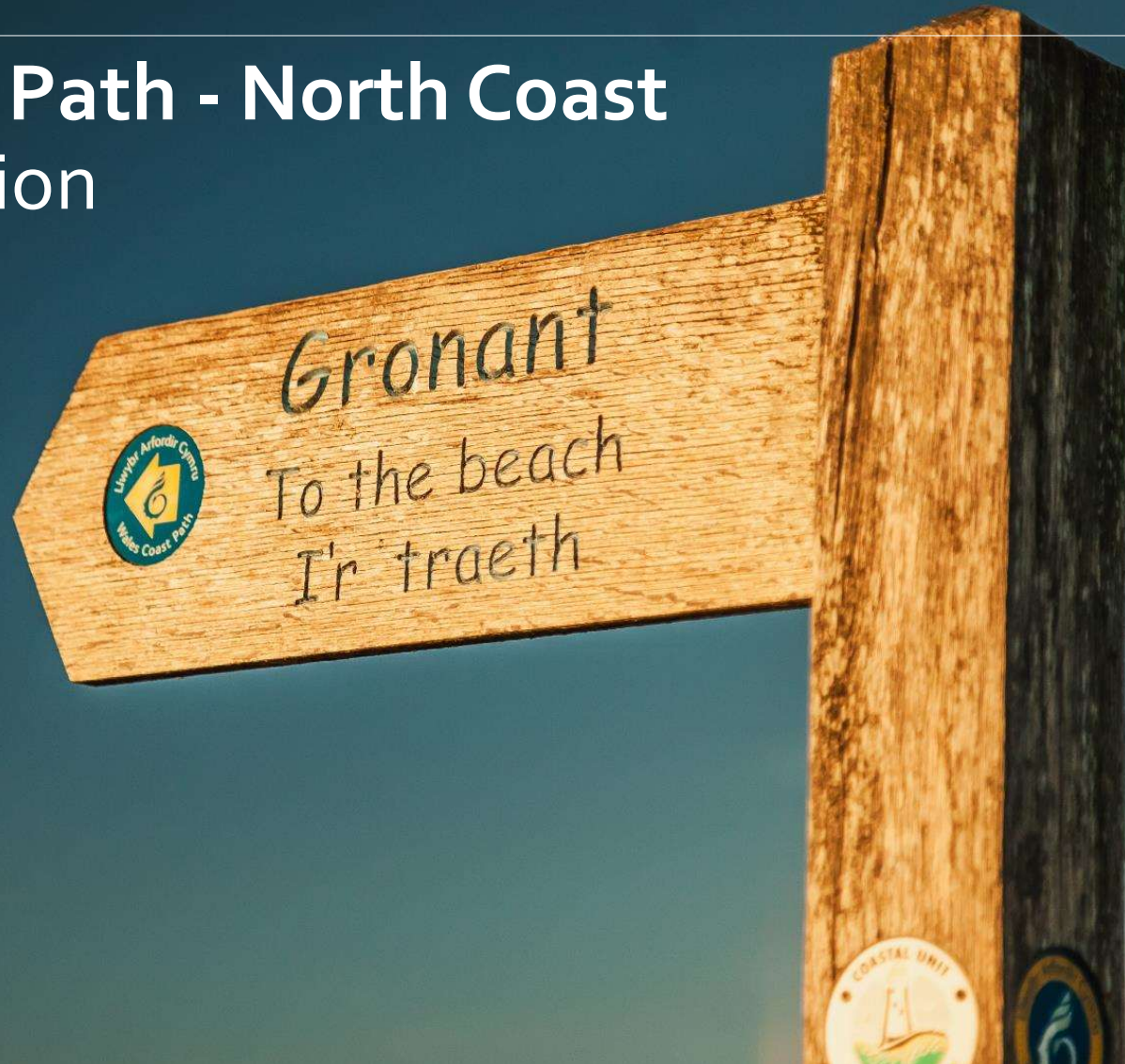
When excluding 'don't know' responses, ratings of the maintenance of path furniture remains most positive (59% good/very good), followed by signage, with 54% of those aware rating this as good/very good. Unfortunately, dissatisfaction with the maintenance of facilities is higher, reaching 41% poor/very poor compared to 27% with don't know responses included.



Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path)(79) **Q20.** How would you rate each of the following aspects?
 *Base varies by statement due to the removal of 'don't know' responses. Data labels <5% not shown

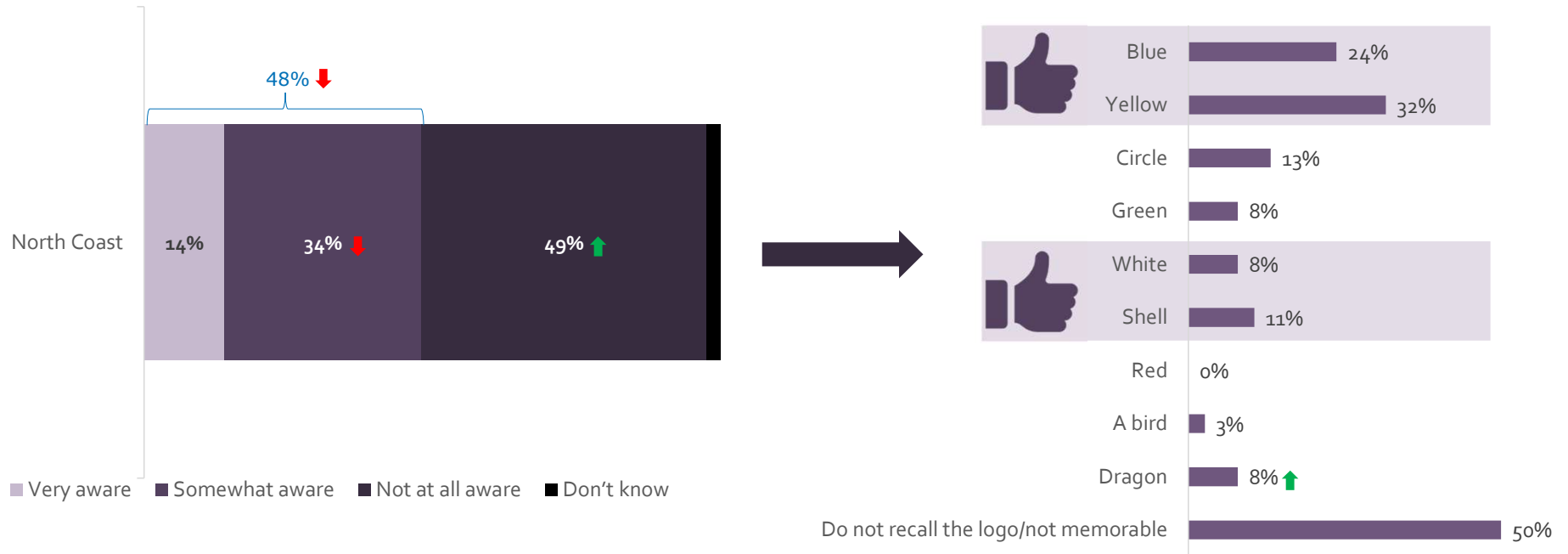
↓ ↑ Significantly higher/lower than Wales Coast Path (total)

Wales Coast Path - North Coast Path promotion



Branding Awareness

Only 48% of the North Coast region businesses have at least some awareness of the path's branding (vs. 71% on average for Wales Coast Path in total), with 14% of businesses stating they are 'very aware'. However, when those respondents were asked to describe the logo, not all got the details correct. 32% correctly stated that the logo is yellow, and 24% say that it is blue, but only 8% recall that it is white and 11% correctly state that the logo represents a shell. Furthermore, 50% state that the logo is not memorable.



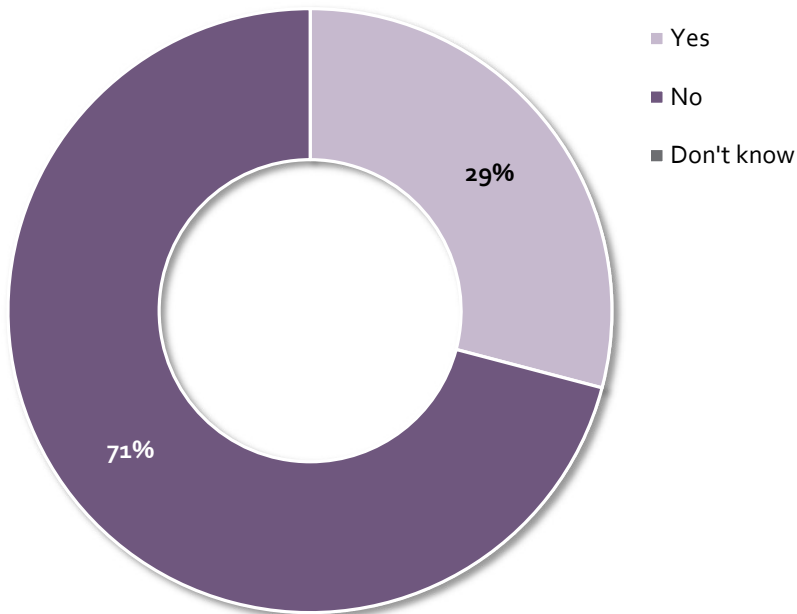
Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path)(79) **Q10.** To what extent are you aware of the branding for the Wales Coast Path or how it's promoted? **Base:** All respondents along the North Coast who are aware of the branding for the Wales Coast Path or how it's promoted (38) **Q11.** How would you describe the branding (i.e. logo) of Wales Coast Path?

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

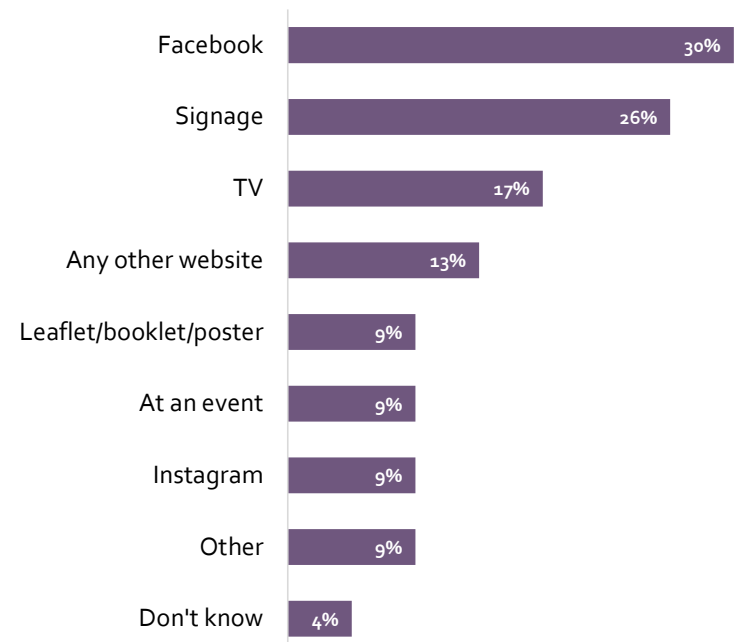
Advertising awareness

29% of businesses in the North Coast region 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). Amongst the 23 businesses that have seen advertising, it is most likely to have been seen via Facebook, signage and TV.

% seen publicity/advertising



Where publicity/advertising seen*

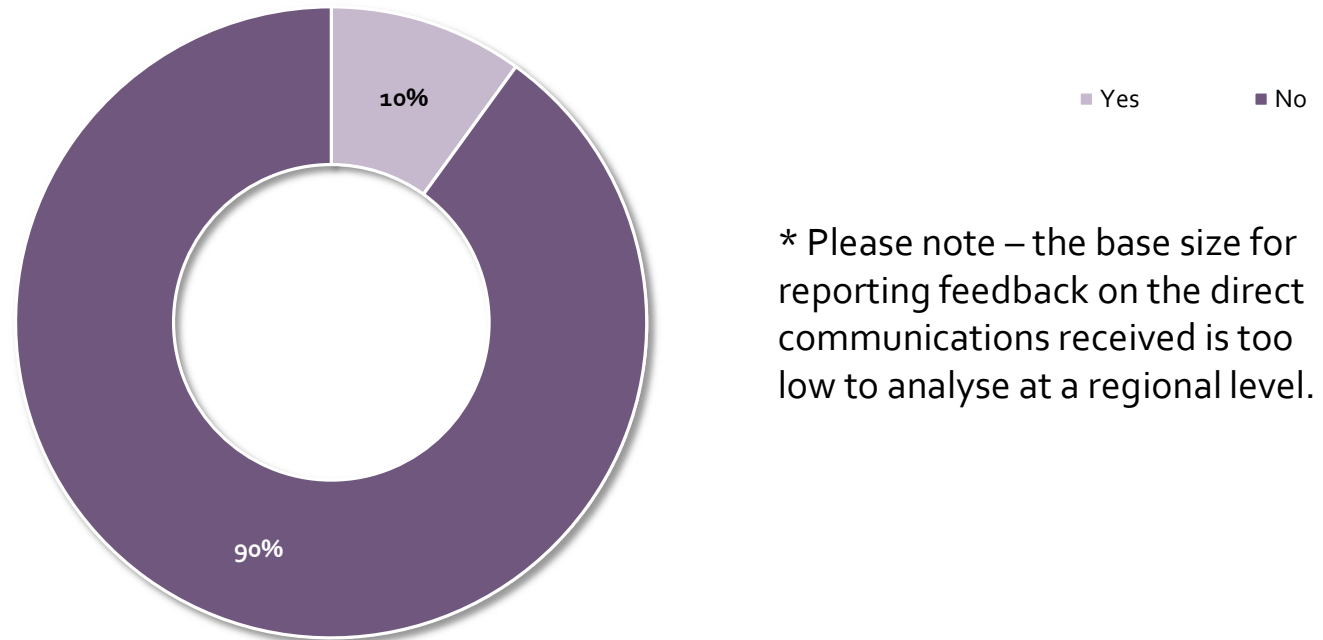


Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path)(79) **Q12.** Over the past year, have you seen or heard any publicity, advertising or information about the Wales Coast Path? **Base:** All respondents along the North Coast who have seen or heard publicity, advertising or information (23) **Q13.** Please can you tell me where or how you have seen publicity, advertising or information for the Wales Coast Path?
 *CAUTION – Low base size **Note – mentions <5% not shown

Receipt of direct communications

Just 10% of businesses recall having received direct communications about the Wales Coast Path in the past year. This is consistent with the average for the Wales Coast Path in total (10%).

% 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.

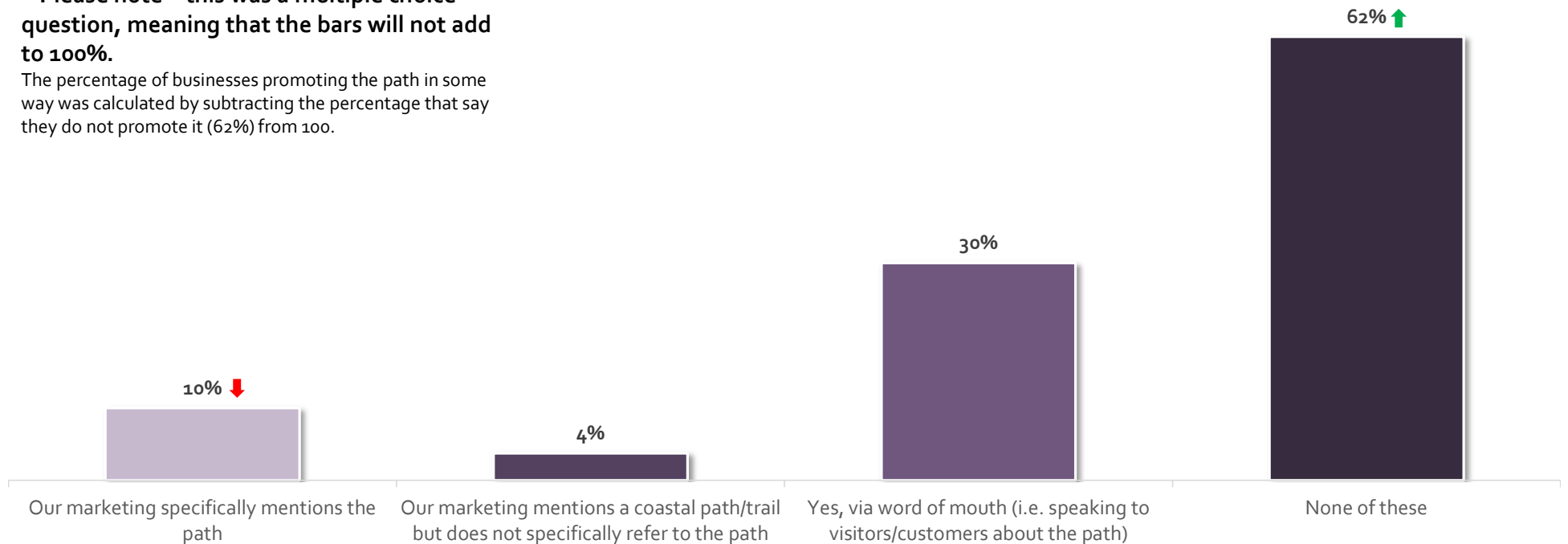
Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path) (79) Q15. Over the past year, do you recall receiving any direct communications about the Wales Coast Path?

Path promotion by businesses

38% of businesses promote the Wales Coast Path in some way (compared to 52% on average for the Wales Coast Path), with 10% stating that the path is specifically mentioned in their marketing materials. A further 30% of businesses promote the path via word-of-mouth (cf. 40% of WCP total), and 4% mention a path, but not by name (cf. 9% of WCP total)

*** Please note – this was a multiple choice question, meaning that the bars 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 (62%) from 100.



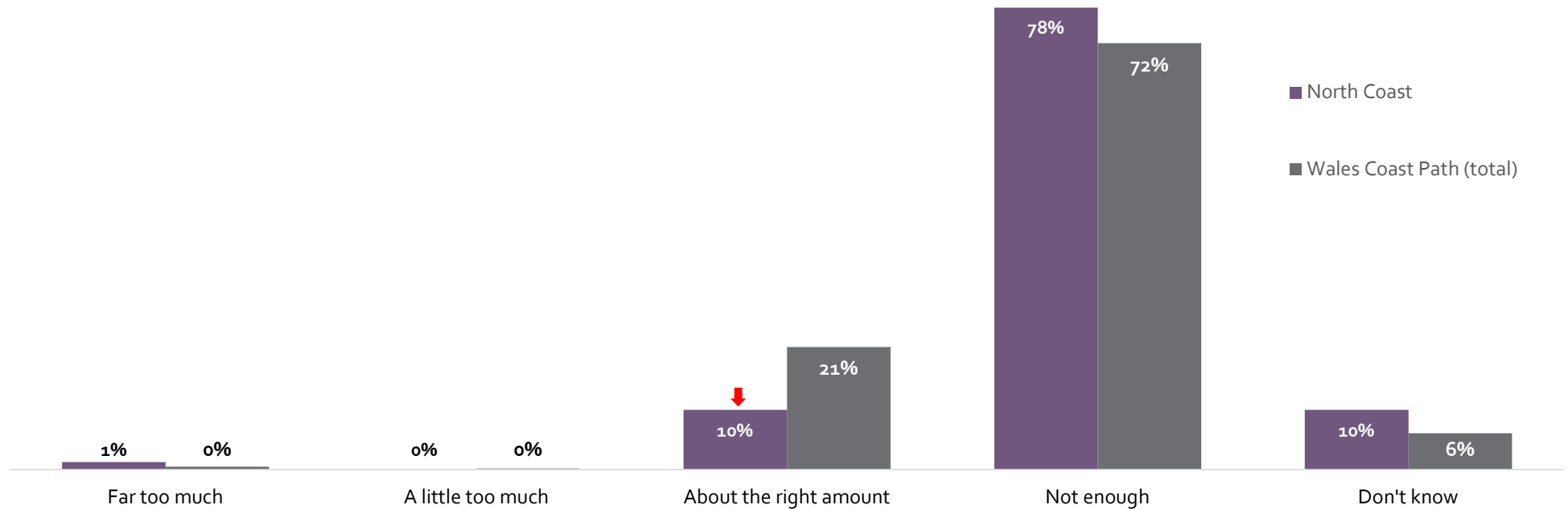
Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path) (79) **Q17.** Do you mention or promote the Wales Coast Path in any of your own marketing materials, for example on your website or social media channels, or when speaking to your customers?

Significantly higher/lower than Wales Coast Path (total)

Path promotion

An overwhelming 78% of businesses along the North Coast think the Wales Coast Path is not promoted enough. Just 10% say it is promoted about the right amount (vs 21% total). This links to the findings in slide 28 which highlights a need to raise the profile of the path.

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

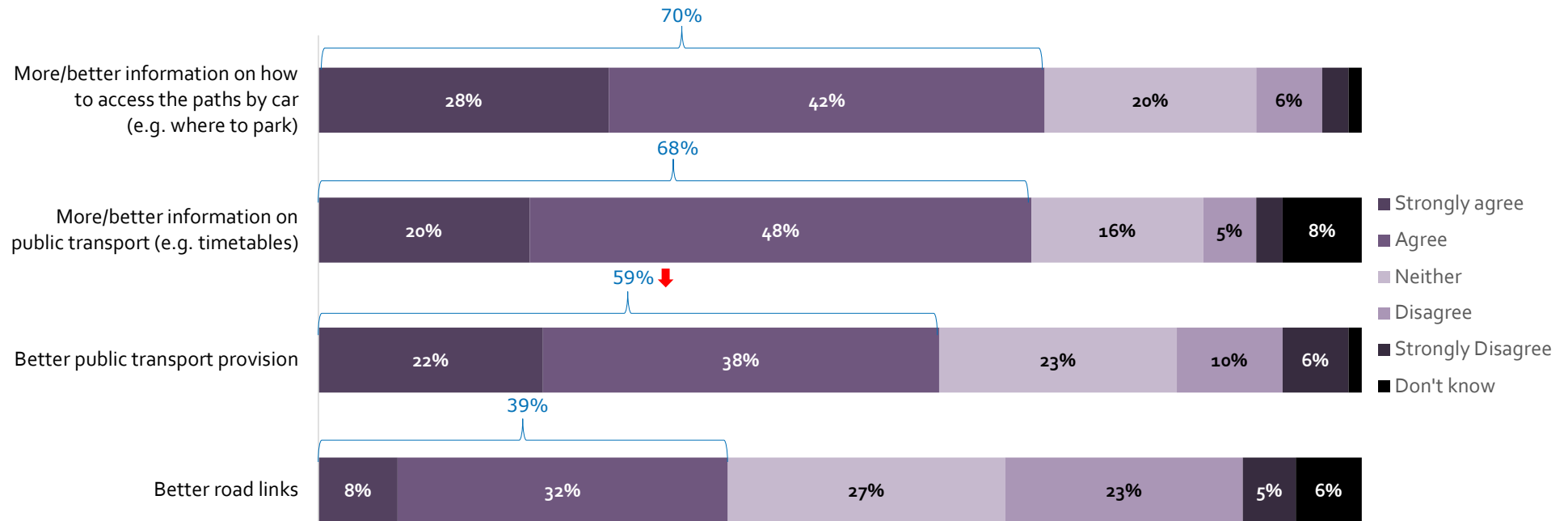


Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path) (79) Q19. Overall, do you think the Wales Coast Path is promoted...?

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

Encouraging visits

Businesses were presented with four potential improvements to the path and asked to state to what extent they agreed or disagreed whether they are needed. 70% of businesses feel that more/better information on how to access the path by car is needed. This is closely followed by more/better information on public transport such as timetables (68%) and better public transport provision (59%). On a more positive note, only 39% businesses think better road links are needed.

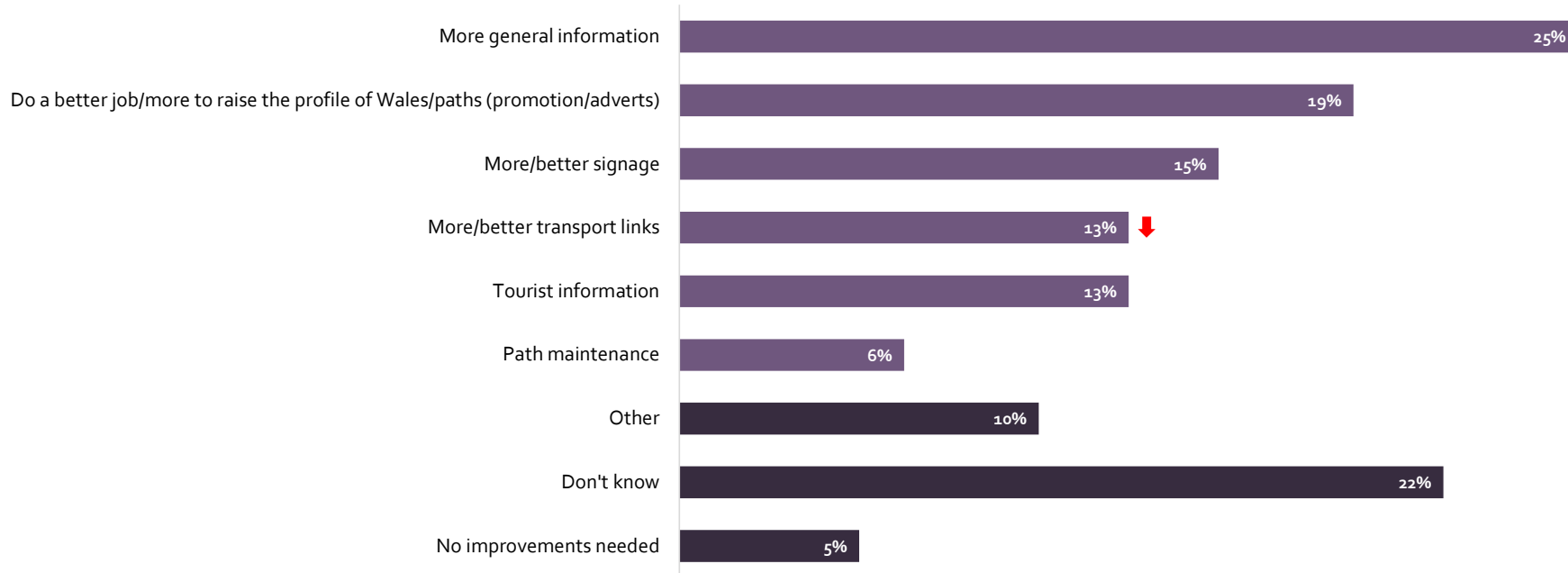


Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path) (79) Q21. To what extent, do you agree or disagree that each following are needed to encourage more people to visit the Wales Coast Path? *Note – data labels <3% not show for neatness.

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

Improving access

When asked in an open question what improvements are necessary to improve access, North Coast businesses' top recommendation for Wales Coast Path is to provide more general information about the path, with 25% making this a priority, 7% points higher than findings for the Wales Coast Path, nationally (18%). Businesses along the North Coast also place importance on raising the profile of Wales and the Wales Coast Path (19% cf. 16% total). Additionally, 15% believe that customers/visitors could benefit from better signage, which is 4% points higher than the Wales Coast Path average (11%).

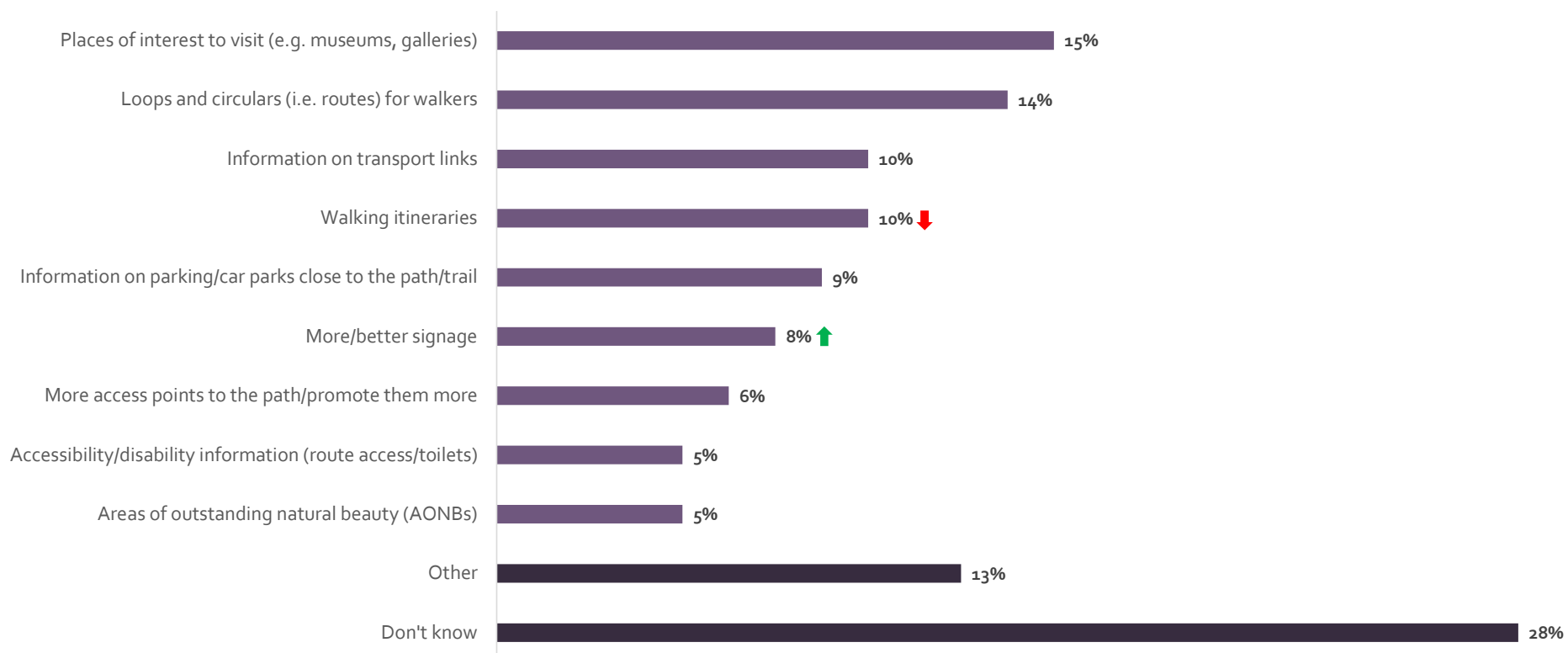


Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path) (79) Q22. What improvements (if any), do you think are needed to help more customers/visitors travel around or access the path? *note – mentions <5% not shown.

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

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 places of interest to visit (15%), loops and circulars (routes) (14%), information on transport links (10%) and walking itineraries (10%).



Base: All businesses located in the North Coast visitor region (and also assigned to Wales Coast Path) (79) Q30. What kind of information do you think would be most helpful to your customers or other users of the Wales Coast Path or National Trails? *Note – mentions <5% not shown

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

Wales Coast Path - North Coast

Conclusions and recommendations

Conclusions

Although 42% of businesses on the North Coast state that the path has no current benefit on their business, 58% do recognise its importance, with 16% describing it as 'very important' to their success.

Additionally, 19% anticipate that the path will become even more important in the future as tourism increases and the path is promoted further.


Currently, nearly half (48%) of businesses on the North Coast have some awareness of the Wales Coast Path branding, which shows good initial engagement.

However, this leaves room for further growth to ensure businesses can fully leverage the branding in their marketing efforts.


Transportation access improvements present opportunities for visitor growth.

Businesses highlight the need for better information on car access (70%) and improved public transport details (68%), but road improvements are less of a priority.

Recommendations




Businesses could collaborate with tourism boards and neighbours to develop joint promotional initiatives like "Pathway Discovery Discounts" and themed itineraries, encouraging longer visits and greater spending.



To further improve awareness, consider launching a targeted awareness campaign to educate businesses about the brand and its benefits.

This could include workshops, direct outreach, and informational materials tailored for local businesses. Providing physical signage, promotional kits, and branded content would ensure the path is consistently recognised and promoted across the region.



Simplified travel guides featuring transport links and parking locations could improve visitor access.

Seasonal shuttles and clearer signage, developed through partnerships, could further enhance accessibility.

Conclusions

Businesses have identified several types of information that visitors would find beneficial, including places of interest (15%), circular routes (14%), and transport links (10%).

By offering more of this targeted information, businesses could better cater to the needs of path users and help them plan longer, more fulfilling visits.

Positive maintenance perceptions provide a strong base for further improvement.

59% of businesses rate path furniture maintenance positively, but there is room to improve the quality of information provided and the maintenance of facilities along the path.

Strengthening communication with businesses offers an opportunity to unlock further collaboration.

While only 10% of businesses recall receiving direct communications about the Wales Coast Path, this low engagement provides an opportunity to create more meaningful and targeted connections with local businesses.

Recommendations

There is an opportunity to work with local stakeholders to develop engaging maps, itineraries, and digital resources that showcase nearby attractions, circular routes, and transport options.

Developing walking itineraries and digital maps, such as “Family Adventure Loops” or “Historic Trails,” would help businesses promote their offerings and create a more engaging visitor experience.

Consider introducing a regular maintenance and accessibility improvement programme, prioritising areas highlighted by **businesses such as path facilities and services.**

This could include frequent inspections, clear reporting mechanisms for businesses to flag issues, and targeted enhancements such as improved signage and information provided.

Enhancing the current newsletter with business-specific content, such as success stories and collaboration opportunities, could improve engagement.

A dedicated business liaison group could further support direct feedback and joint initiatives.

For more information

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