

# Pembrokeshire Coast Path 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



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# Contents

- 03 Background & Methodology
- 06 Business profiles
- 11 Importance of the path to business
- 17 Path quality
- 19 Path promotion
- 31 Conclusions and recommendations

# 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 impact of the **Pembrokeshire Coast Path**.

## 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 route brings 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 route.
- 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 **153** were assigned to the Pembrokeshire 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.

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 were assigned to the Pembrokeshire Coast Path (153).

## 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 or trail, they were assigned to the one which either a) generated the highest proportion of sales or turnover or b) they are most reliant on for their business.

## Comparison to 'total' values

In this report, results for the Pembrokeshire Coast Path are compared to the average figures from the total sample for all routes. The total sample includes businesses linked to the Wales Coast Path, Pembrokeshire Coast Path, Offa's Dyke Path and Glyndŵr's Way National Trails. The combined average is labeled as "All surveyed routes" in the comparison charts.

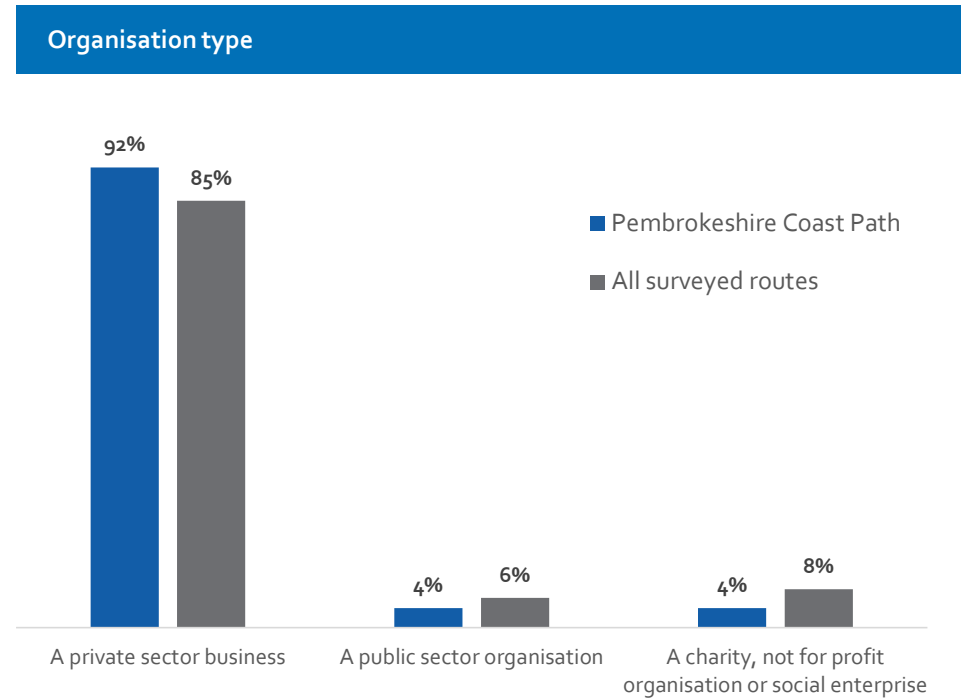
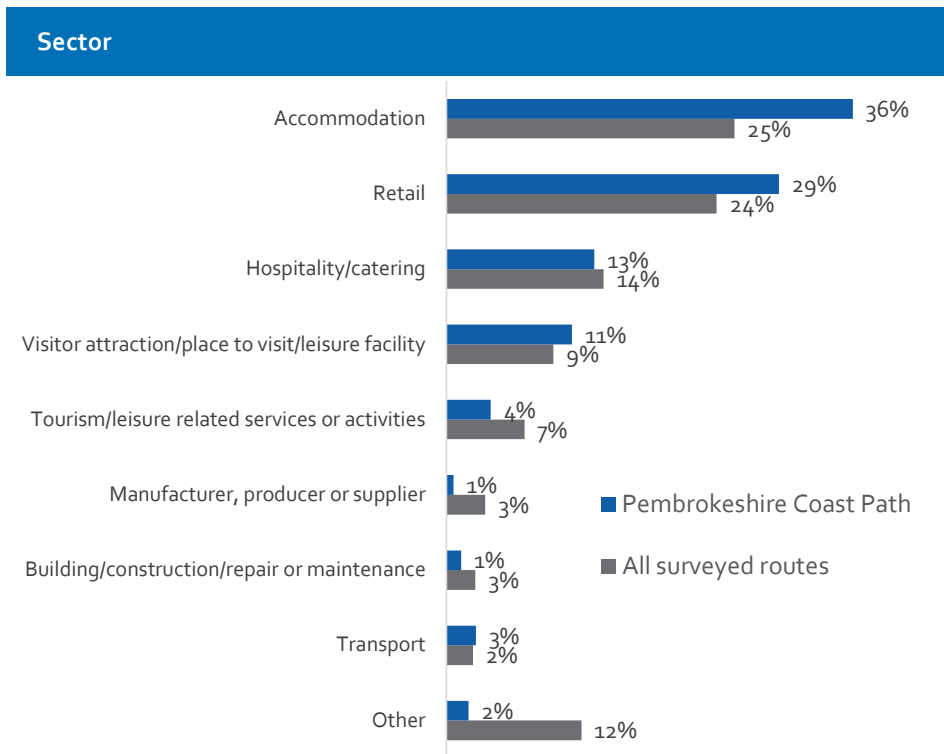
This report specifically focuses on businesses assigned to the Pembrokeshire Coast Path only.

# Business Profiles



# Business profiles (I)

65% of the 153 businesses along the Pembrokeshire Coast Path are in the accommodation or retail sectors, compared with around half on average.

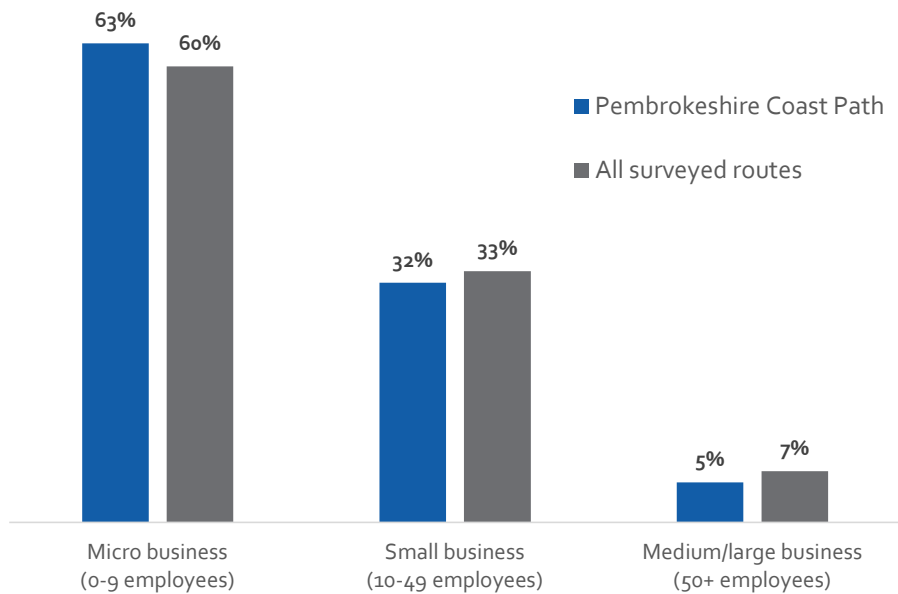


**Base:** Businesses assigned to the Pembrokeshire Coast Path (153). **Q05B.** Which of the following best summarises your main business or organisation’s activities? **Co1.** Which one of the following best describes your business or organisation?

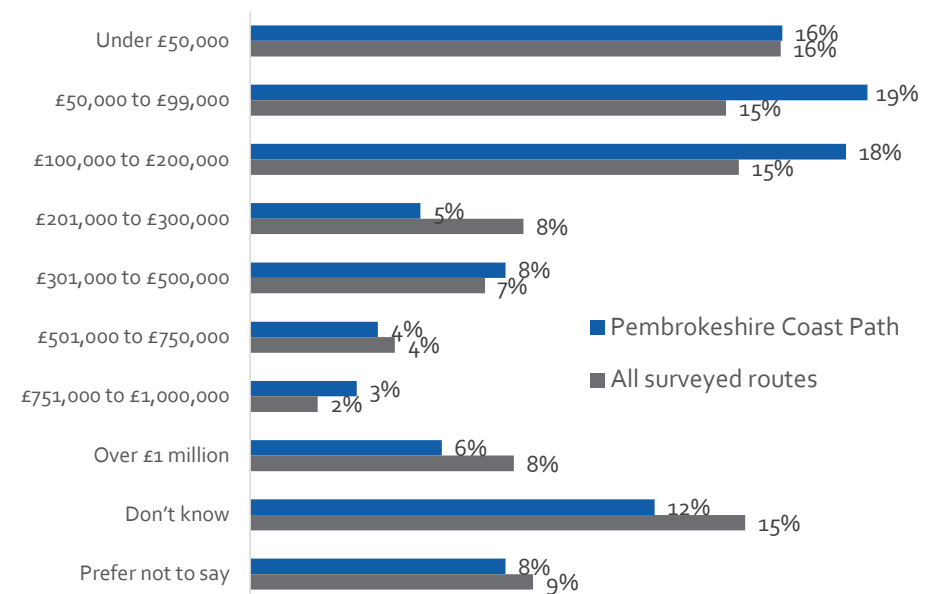
## Business profiles (II)

Most of the businesses along the Pembrokeshire Coast Path employ less than 50 staff members. 53% of businesses have an annual turnover of £200,000 or less.

### Business size



### Turnover



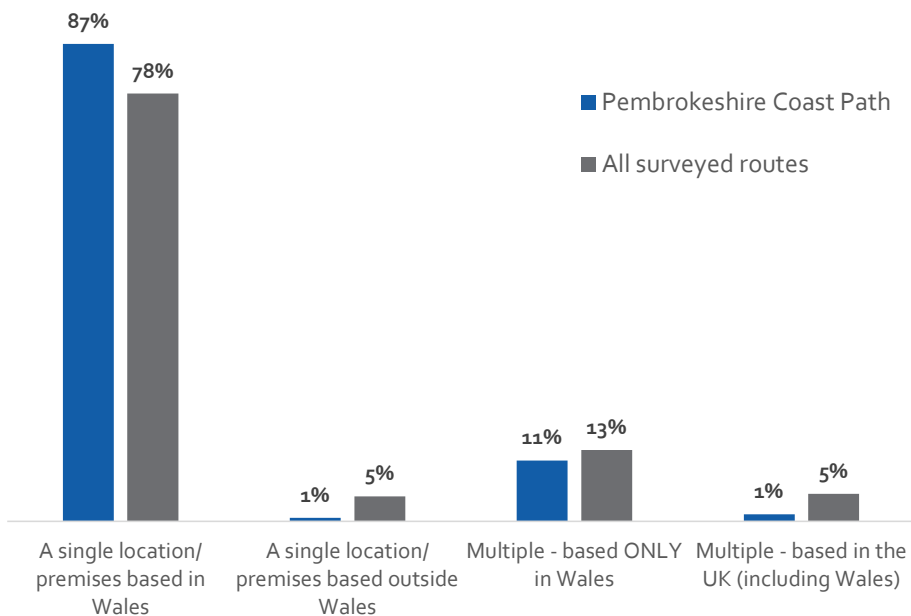
**Base:** Businesses assigned to the Pembrokeshire Coast Path (153). **Q07A/B.** Including yourself, how many permanent full and part time staff are employed by your business or organisation? **Q02.** What was the approximate turnover of your business (or sales value) in your last financial year? .



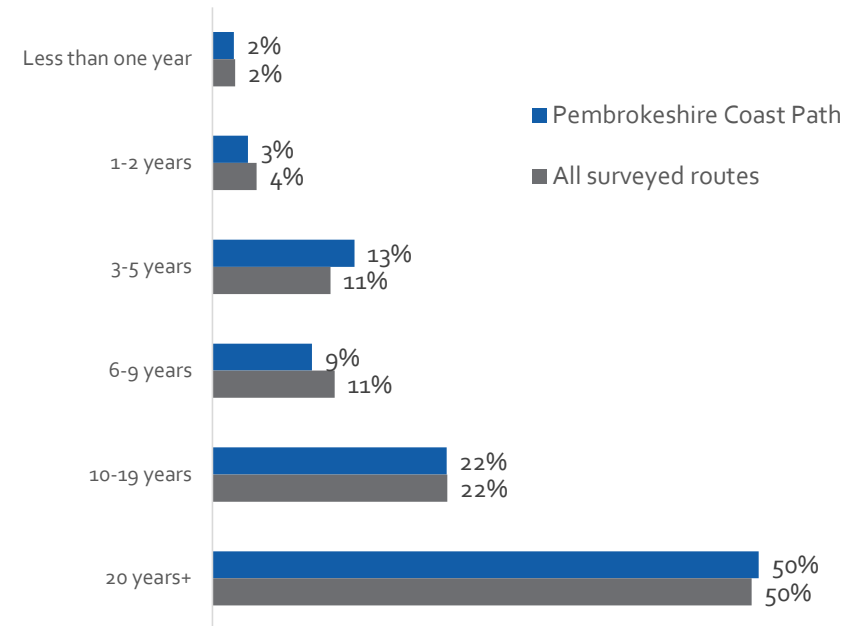
## Business profiles (III)

50% of businesses along the Pembrokeshire Coast Path have been established for 20+ years, and most are based at a single location in Wales (87%).

### Number of premises



### Business tenure



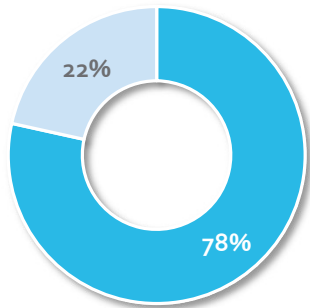
**Base:** Businesses assigned to the Pembrokeshire Coast Path (153). **Qo6.** Does your business or organisation operate from a single location or premises, or multiple locations or premises? **Co4.** Approximately how long has your business or organisation been operating from this location from?

## Business profiles (IV)

78% of businesses along the Pembrokeshire Coast Path are open year-round. While summer is typically the busiest season, 19% of businesses say their activity remains steady year-round.

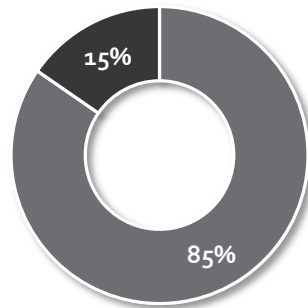
### Business open all year

#### Pembrokeshire Coast Path



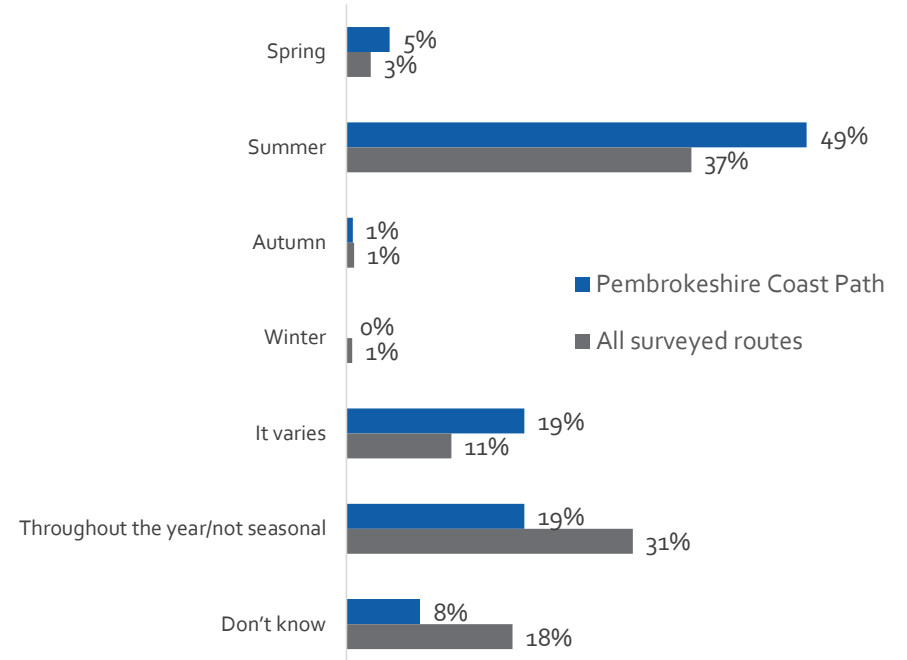
■ Yes ■ No

#### All surveyed routes



■ Yes ■ No

### Peak season



**Base:** Businesses assigned to the Pembrokeshire Coast Path (153). **Q09a.** is your business or organisation 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?

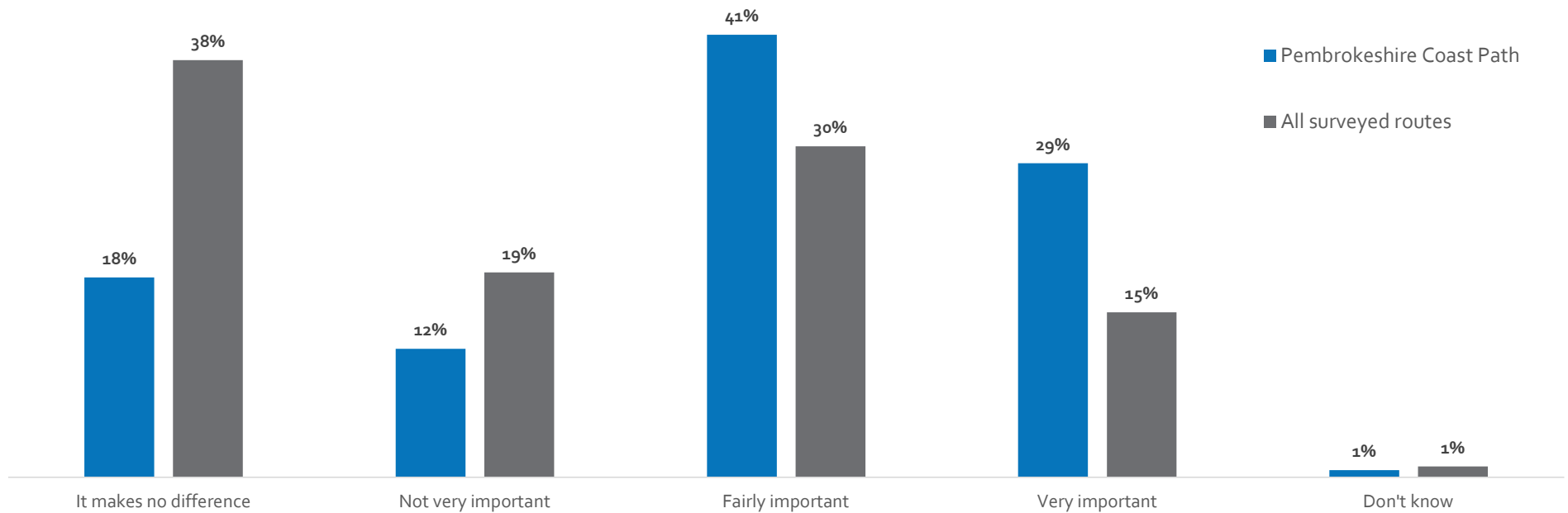
# Importance of the path to business



## Business profiles – path specific

66% of businesses along the Pembrokeshire Coast Path gain some form of benefit from the path's existence. The path is also viewed as 'very important' for 29% of these businesses, almost twice the average.

### Importance of the path to the success of businesses

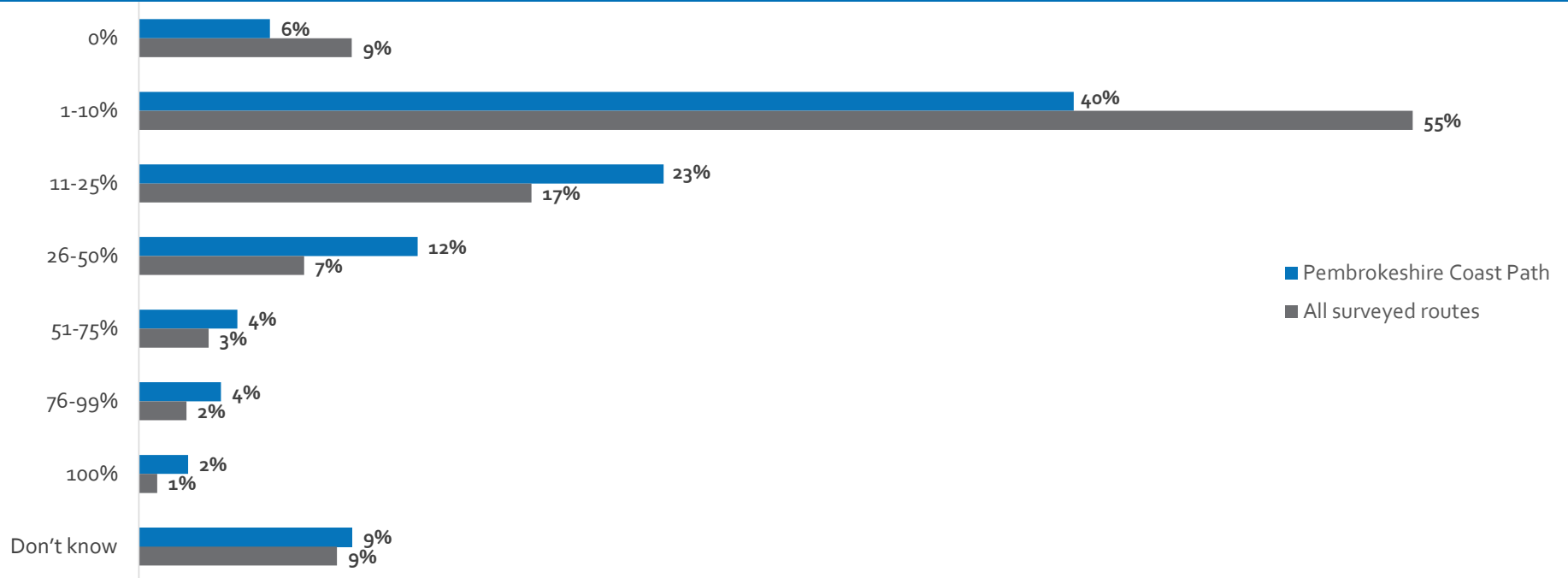


**Base:** Businesses assigned to the Pembrokeshire Coast Path (153). **Q02.** How would you describe the importance of the Pembrokeshire Coast Path to the success of your business or organisation?

## Business profiles – path specific

40% of businesses along the Pembrokeshire Coast Path say that the presence of the path has generated 1-10% of their sales or turnover. A further 23% of businesses say that 11-25% of their turnover is generated by the path. Meanwhile, 10% attribute at least half their income to the presence of the path.

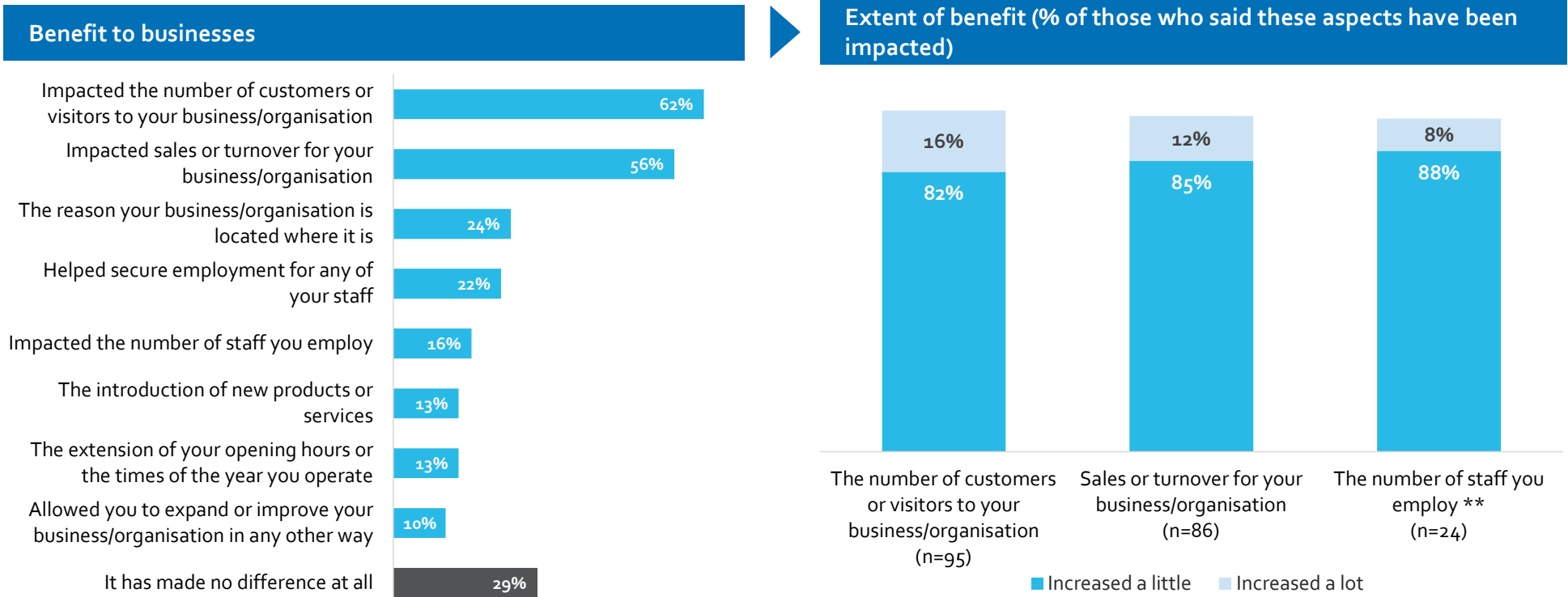
Percentage of sales or turnover generated by path users or existence of path



Base: Businesses assigned to the Pembrokeshire Coast Path (153). Q03. What percentage of your sales or turnover is generated by users of the Pembrokeshire Coast Path or can be attributed to its existence in some way?.

# Benefits of the path to businesses

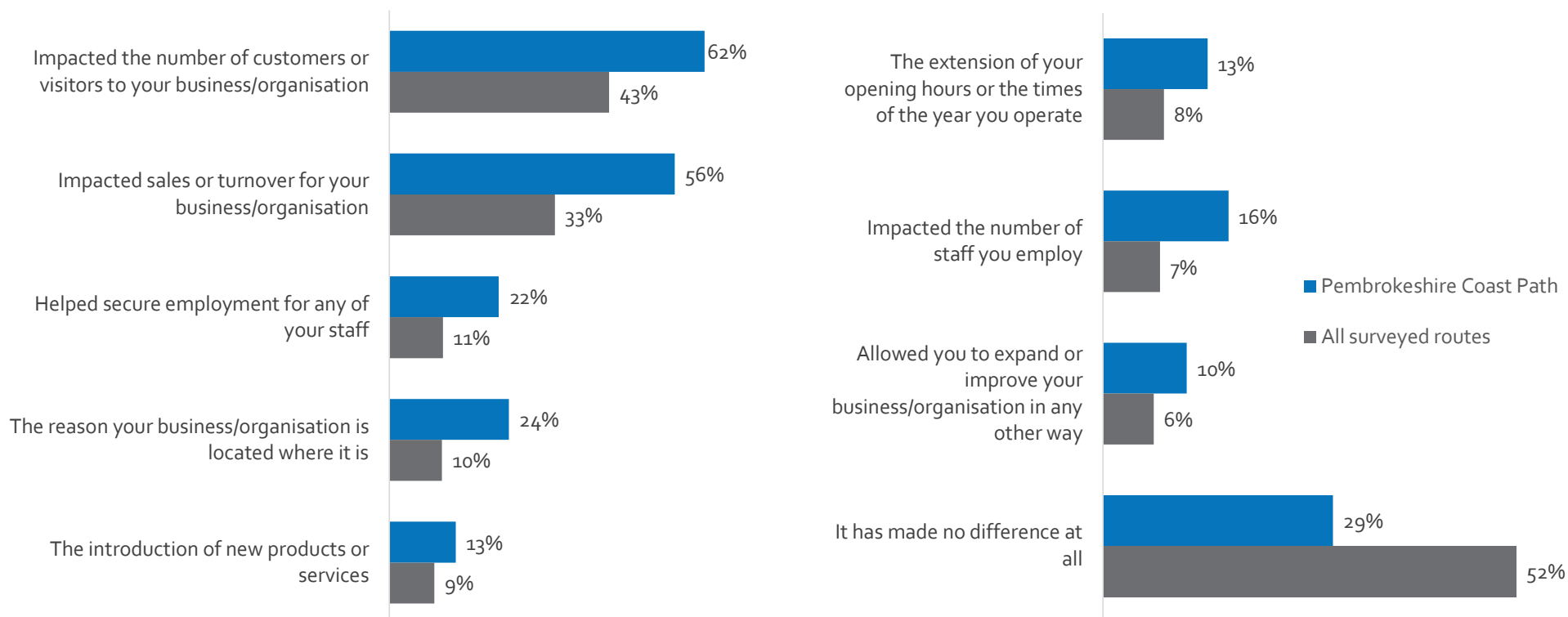
62% of businesses agree that the presence of the Pembrokeshire Coast Path has increased the number of visitors to their organisation, with a further 56% stating that it has benefitted their sales or turnover.



**Base:** All respondents assigned to Pembrokeshire Coast Path (153) **Q24a.** Do you think the presence of Pembrokeshire Coast Path has resulted in or contributed to any of the following for your business or organisation? **Base:** Where each have been impacted at Q024a\_4-6/1 (Base size varies by statement) **Q24b.** To what extent has the presence of the Pembrokeshire Coast Path impacted the following? \*Note – data labels <5% not shown for neatness. \*\*CAUTION – low base size

## Benefits of the path to businesses– versus total

71% of businesses note that they have experienced some benefit from the existence of the path. This is significantly higher than average (48%). The Pembrokeshire Coast Path has a significantly greater positive impact in all areas studied compared to businesses on average, except for the introduction of new products or services.



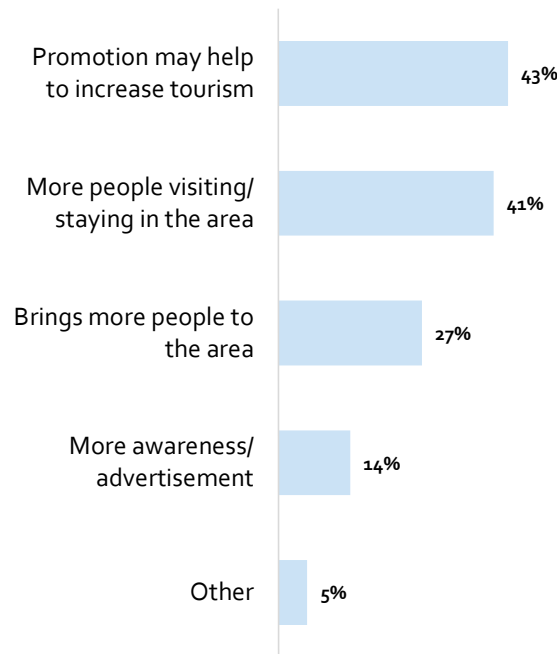
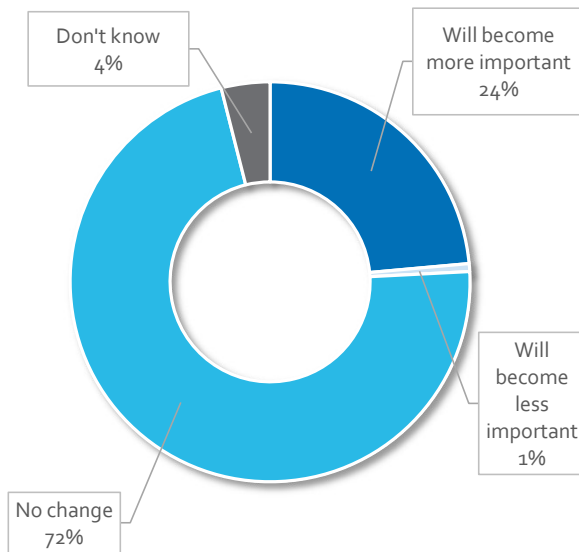
Base: All respondent assigned to Pembrokeshire Coast Path (153) Q24a. Do you think the presence of the Pembrokeshire Coast Path has resulted in or contributed to any of the following for your business or organisation?

# Importance of the path to businesses

24% of businesses agree that the Pembrokeshire Coast Path will become more important to their success in the future. A higher-than-average proportion of those who believe that the path will become more important state that this is because it will result in more people visiting and staying in the area (41% v 23% for all surveyed routes).

## Change in importance of the path to business or organisation success

## Why?\*



"If they develop awareness, (it) will (help) attract more visitors, so we will benefit and cross promote it."

"Well a lot of people, especially after the lock down, are interested in discovering Wales. We have seen a surge, not just from Wales and England but outside of the country of people wanting to explore the trails, a year-on-year increase that we have noticed since the lock down. I hope things do not change when they increase the tourist tax."

**Base:** All respondent assigned to Pembrokeshire Coast Path (153) **Q25a.** Do you consider that in the future there will be any change in the importance of the Pembrokeshire Coast Path to the success of your business or organisation? **Base:** Where path will become more important (37) **Q25b.** Why is that? \*CAUTION – low base size

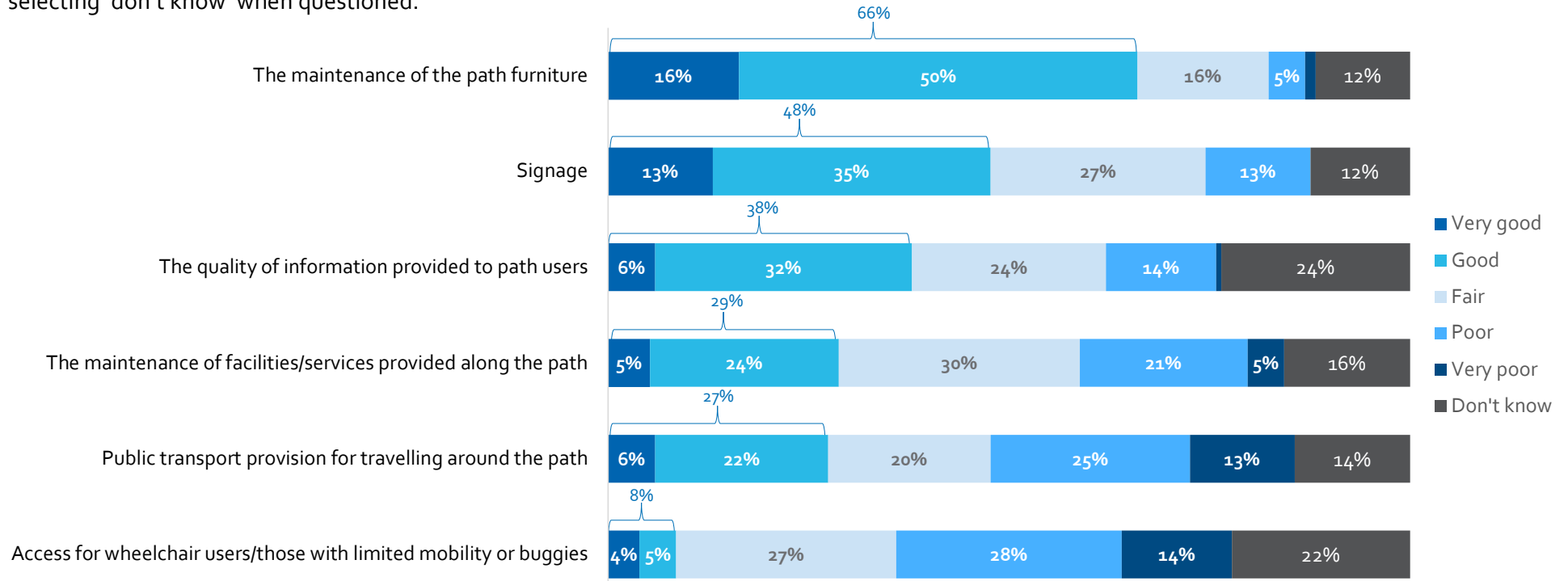


# Path quality



## Perceptions of aspects of the path

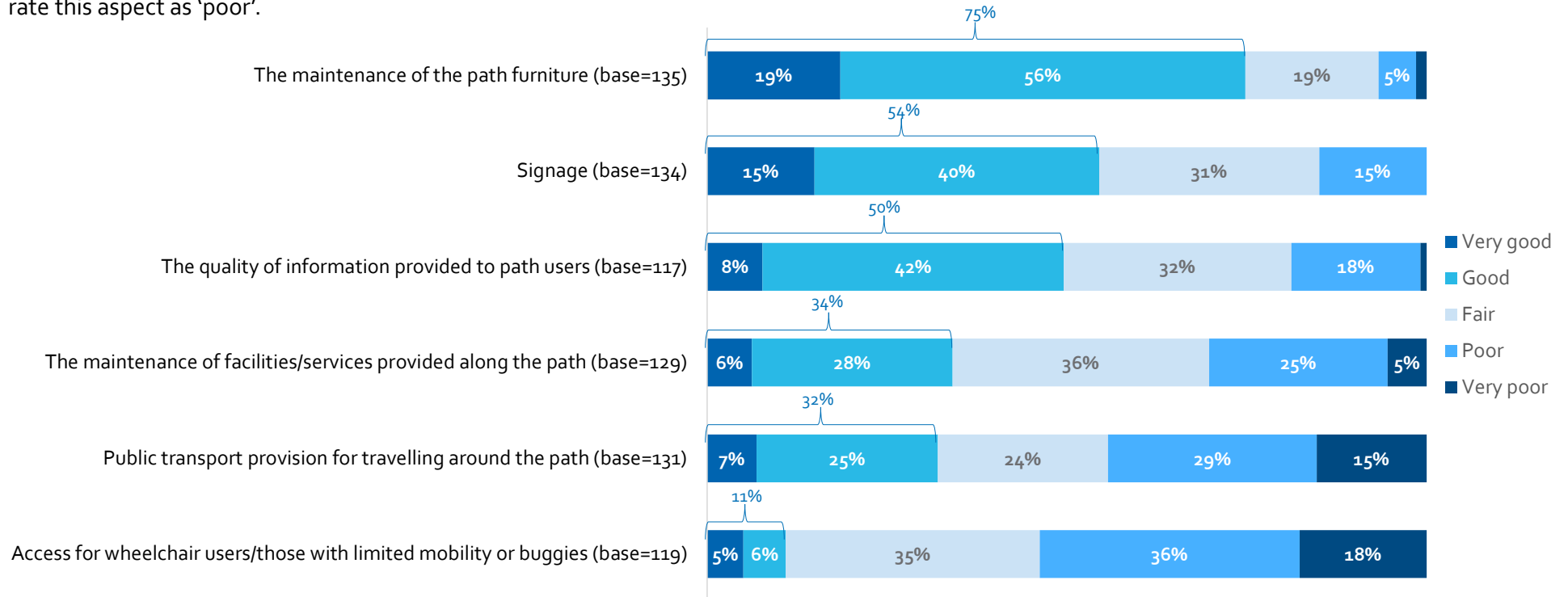
66% of businesses along the Pembrokeshire Coast Path rate the maintenance of path furniture positively (66%). 48% also give a positive rating for path signage. However, just 8% rate accessibility of the path as 'good', with 42% instead rating it as 'poor', suggesting improvements could be made here. It should be noted that many respondents showed low levels of awareness about the quality of these aspects of the path, selecting 'don't know' when questioned.



Base: All respondent assigned to Pembrokeshire Coast Path (153) Q20. How would you rate each of the following aspects?

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

Removing 'don't know' responses changes the outlook slightly. Businesses who **are aware** are most positive with regards to the maintenance of the path furniture (75% good/very good). This is significantly higher than the average scores for businesses across all routes combined (63%). While the percentage rating accessibility of the path as 'good' has risen to 11% (from 8% when don't know is included), 54% rate this aspect as 'poor'.



Base: All respondent assigned to Pembrokeshire Coast Path, excluding 'Don't know'. Base varies by statement due to the removal of 'don't know' responses. Q20. How would you rate each of the following aspects?

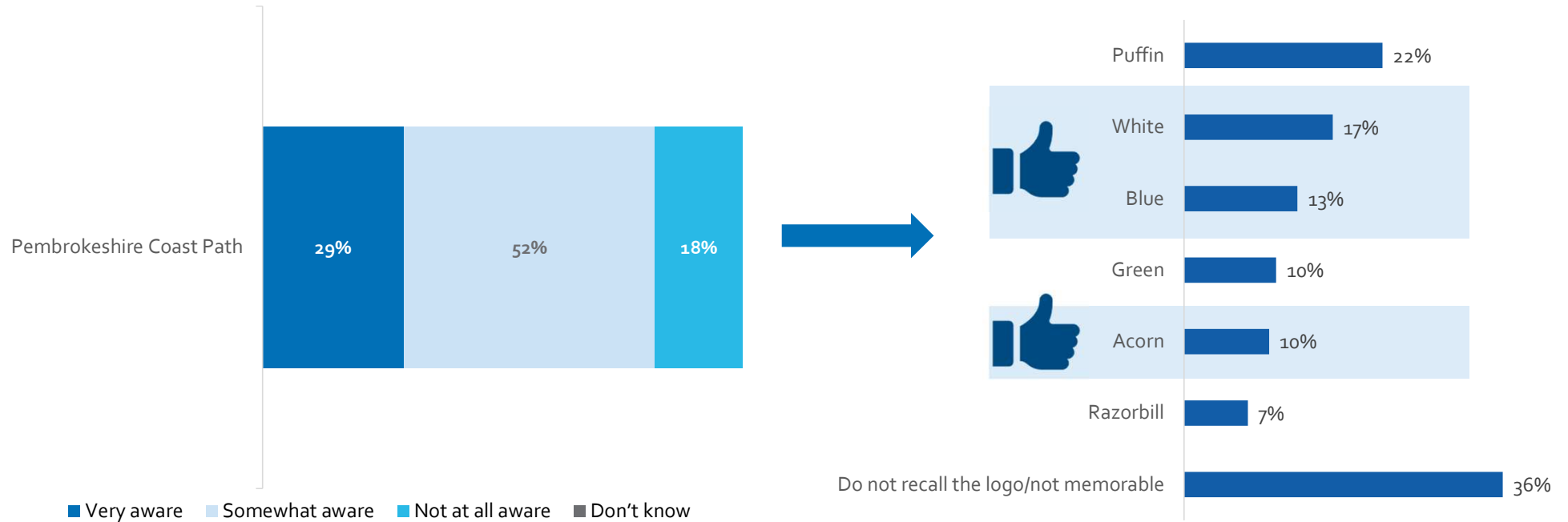


# promotion



# Branding awareness

81% of businesses along the Pembrokeshire Coast Path have at least some awareness of the branding. This is significantly higher than all routes combined (68%). However, when asked to give details of the path logo, responses highlighted some confusion and varying degrees of awareness. Though 17% and 13% respectively mentioned that the logo is blue or white, just 10% mentioned an acorn, and none mentioned a shell/dragon tail. For 22% of businesses, they describe the path branding as depicting a Puffin, with another 7% mentioning a Razorbill – it is likely that these businesses are commenting on the branding for the Pembrokeshire Coast National Park, rather than the Pembrokeshire Coast Path.

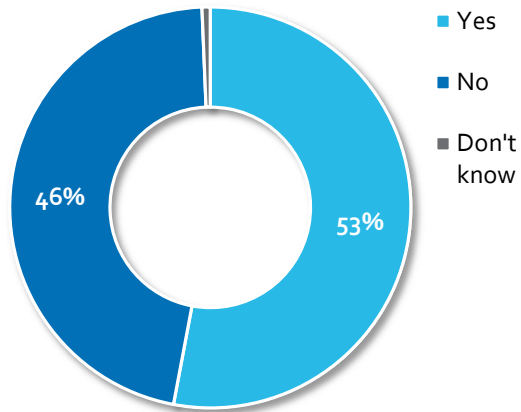


Base: All respondents (153) Q10. To what extent are you aware of the branding for the Pembrokeshire Coast Path or how it's promoted?.

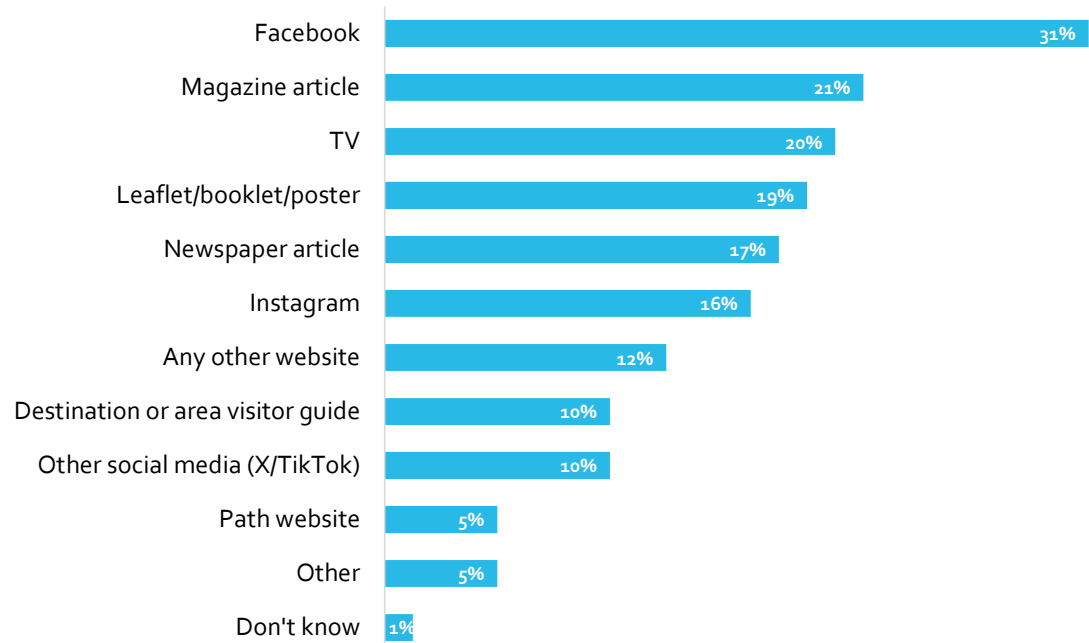
# Advertising awareness

53% of businesses along the Pembrokeshire Coast Path have seen some sort of publicity or advertising for the path in the last 12 months, +20% points higher than average. Facebook is the most frequently mentioned source (31%), followed by magazine articles (21%).

% seen publicity or advertising



Where publicity or advertising seen



**Base:** All respondent assigned to Pembrokeshire Coast Path (153) **Q12.** Over the past year, have you seen or heard any publicity, advertising or information about the Pembrokeshire Coast Path? **Base:** All respondents who have seen or heard publicity, advertising or information (81) **Q13.** Please can you tell me where or how you have seen publicity, advertising or information for the Pembrokeshire Coast Path? \*Note – responses <5% not shown.

## Perceptions of advertising

88% of those that recall any publicity believe that recent publicity about the path has been positive for attracting visitors (56% good, 32% fair). Meanwhile, 75% consider this publicity at least somewhat effective in helping or benefitting their business or organisation. Very few businesses view the publicity, advertising, or information they've encountered as poor across any metric.

“How would you rate the publicity, advertising or information you have seen or heard about the path in the past year, in terms of...?”

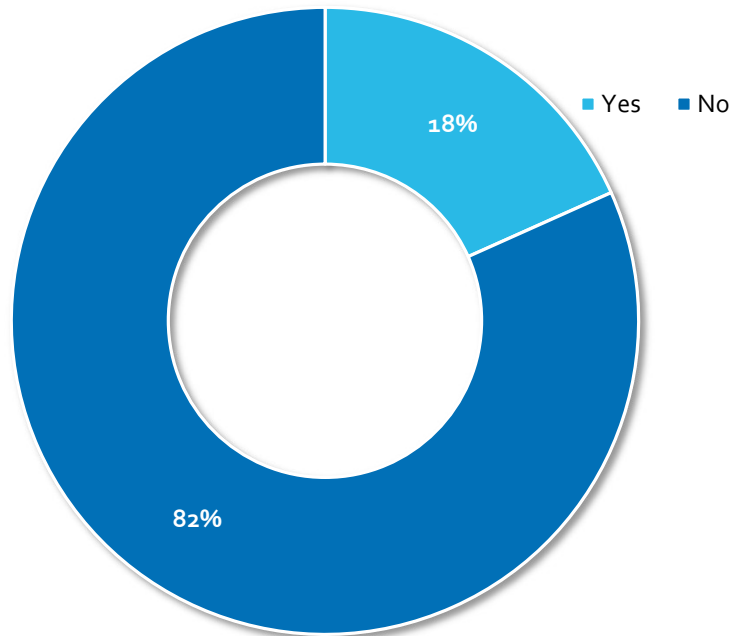
	Good	Fair	Poor
<b>Frequency</b>	44% (37% for all surveyed routes)	43% (36% for all surveyed routes)	6% (20% for all surveyed routes)
<b>Effectiveness in terms of attracting visitors or users to the path</b>	56% (50% for all surveyed routes)	32% (28% for all surveyed routes)	6% (11% for all surveyed routes)
<b>Effectiveness in terms of helping or benefitting the success of your business or organisation</b>	35% (29% for all surveyed routes)	40% (33% for all surveyed routes)	14% (19% for all surveyed routes)

**Base:** All respondents who have seen or heard publicity, advertising or information (81) **Q14.** How would you rate the publicity, advertising or information you have seen or heard about the Pembrokeshire Coast Path in the past year, in terms of...? \*Note – ‘don’t know’ responses not shown.

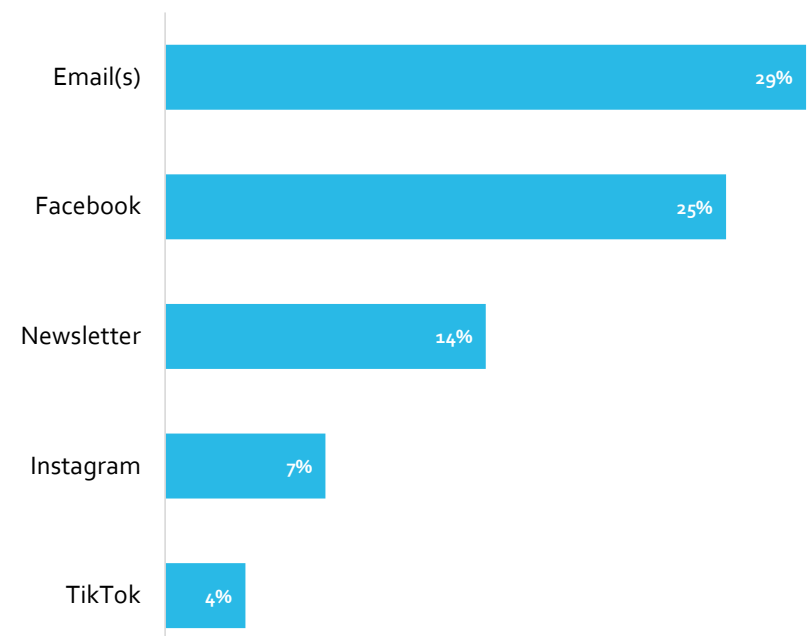
## Receipt of direct communications

The Pembrokeshire Coast Path sees a higher-than-average proportion of businesses having received direct communications about the path (18% v 9% for all surveyed routes). The most common medium for receiving direct communications is email (29%), closely followed by Facebook (25%).

% received direct communications



How direct communications were received



**Base:** All respondent assigned to Pembrokeshire Coast Path (153) Q15. Over the past year, do you recall receiving any direct communications about the Pembrokeshire Coast Path? **Base:** All respondent assigned to Pembrokeshire Coast Path who do recall receiving direct communications (28) \*Note – responses <5% not shown. \*CAUTION – low base size.



## Perceptions of direct communications

Of those who recall receiving direct communications 75% rate the frequency of direct communications as 'good' or 'fair', with 18% considering it poor. Similarly, 82% believe these communications are fair/good in terms of their effectiveness in attracting visitors to the path, and 78% see them positively impacting the success of their business, though 18% rate this aspect as poor.

"How would you rate the direct communications you have received in the past year about the Pembrokeshire Coast Path, in terms of...?" \*\*

	Good	Fair	Poor
<b>Frequency</b>	46% (42% for all surveyed routes)	29% (36% for all surveyed routes)	18% (14% for all surveyed routes)
<b>Effectiveness in terms of attracting visitors or users to the path</b>	50% (49% for all surveyed routes)	32% (27% for all surveyed routes)	4% (10% for all surveyed routes)
<b>Effectiveness in terms of helping or benefitting the success of your business or organisation</b>	39% (40% for all surveyed routes)	39% (34% for all surveyed routes)	18% (18% for all surveyed routes)

**Base:** All respondents assigned to the Pembrokeshire Coast Path who recall receiving direct communications (28) \*CAUTION – low base size **Q16** How would you rate the direct communications you have received in the past year about the Pembrokeshire Coast Path, in terms of...? Note – 'don't know' responses not shown.

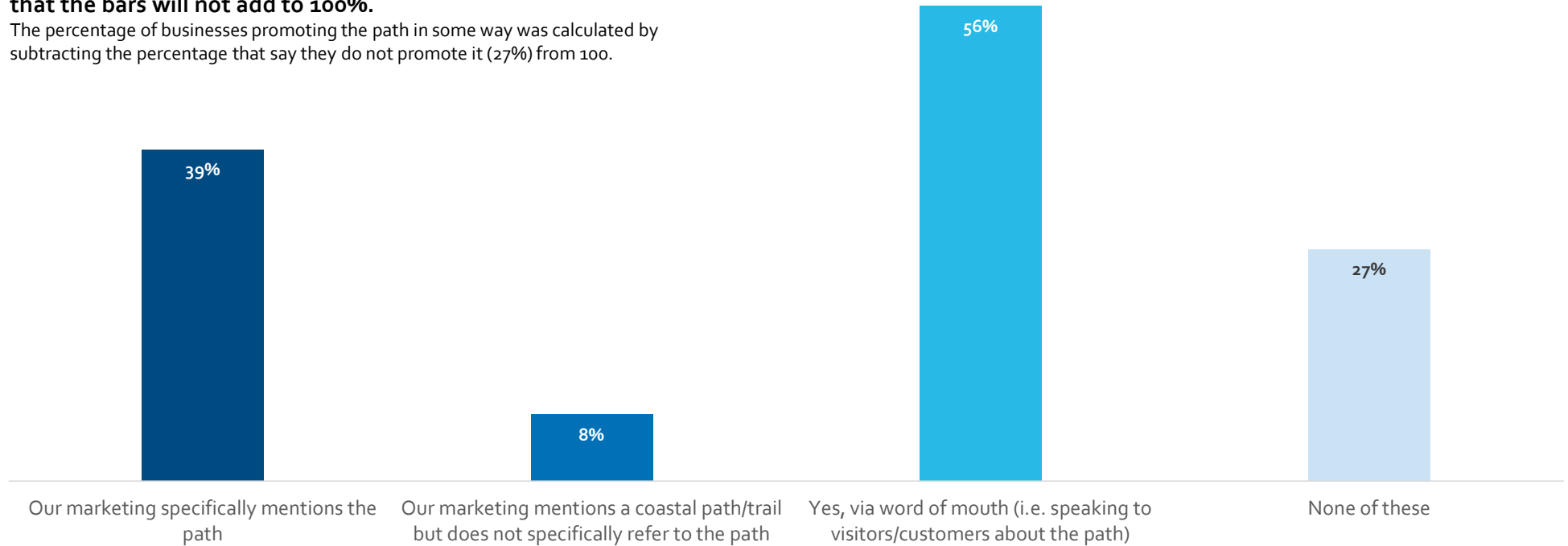
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## Path promotion by businesses

Businesses along the Pembrokeshire Coast Path are significantly more likely than average to specifically mention the path in their own marketing (39% v 19% for all surveyed routes). The same is true for promoting the path via word of mouth (56% v 36%).

**\* 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 (27%) from 100.



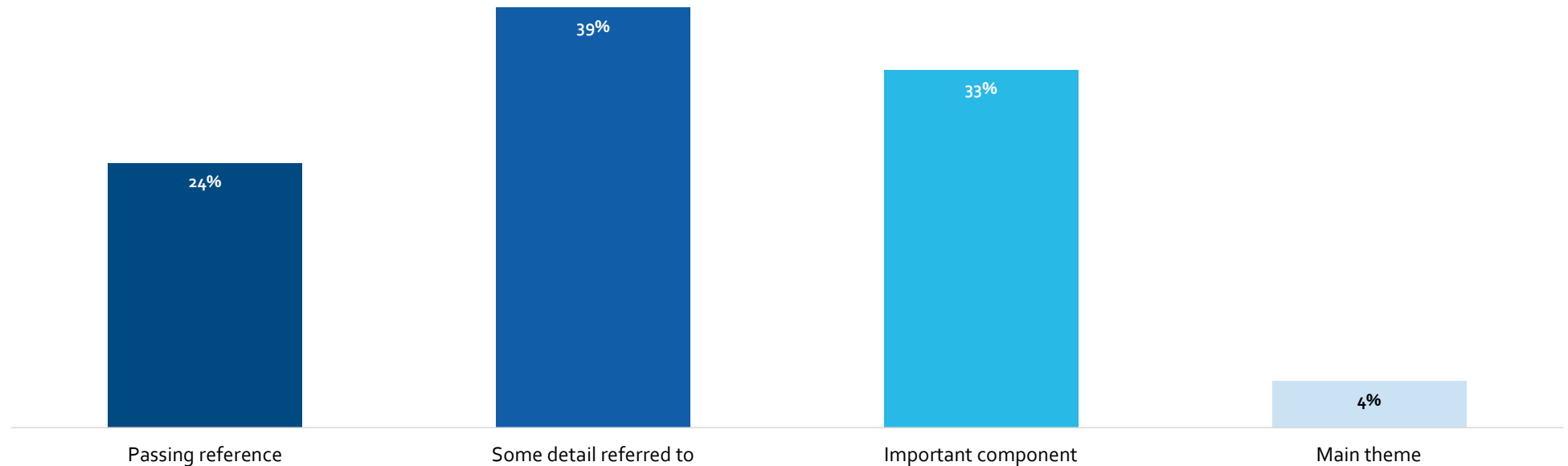
**Base:** All respondent assigned to Pembrokeshire Coast Path (153) **Q17.** Do you mention or promote the Pembrokeshire Coast Path in any of your own marketing materials, for example on your website or social media channels, or when speaking to your customers?

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## Path promotion by businesses

The Pembrokeshire Coast Path is an important component in the marketing materials of one-third of businesses who make reference to the path in their marketing materials (33%). However, it is more likely that businesses include just some details referring to the path in their marketing (39%).

### Prominence of path in marketing materials

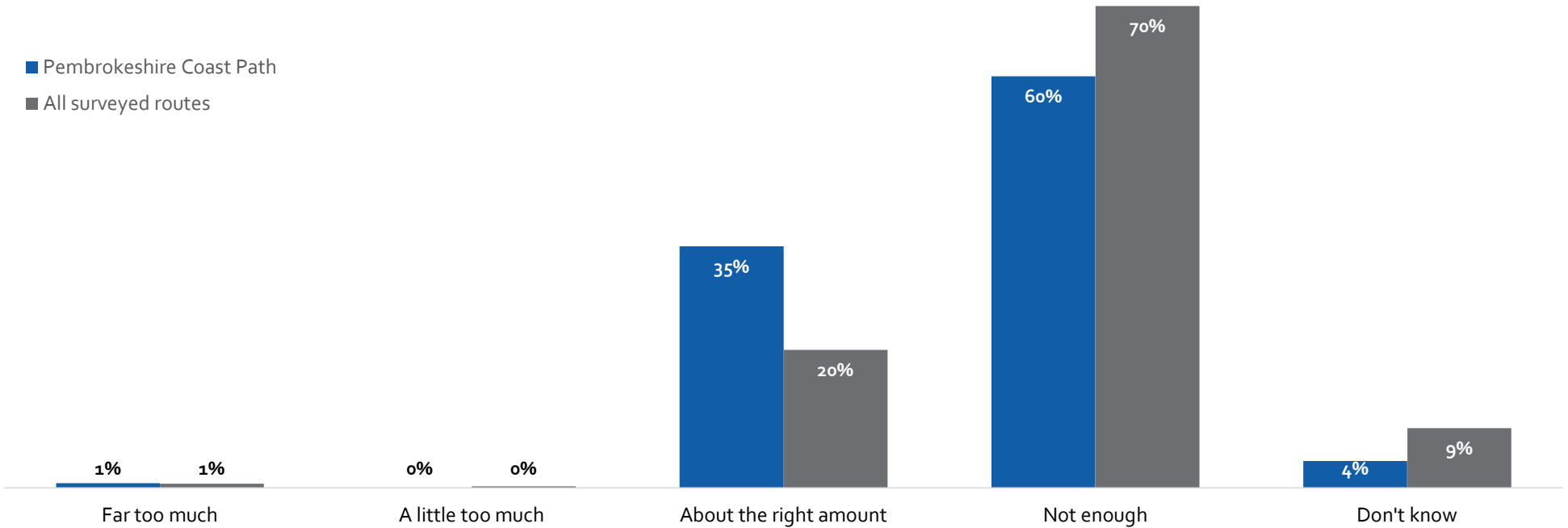


**Base:** All respondents who mention the Pembrokeshire Coast Path in their marketing materials (70) **Q18.** Which of the following best describes how prominent the Pembrokeshire Coast Path is in your marketing?

# Path promotion

A higher-than-average proportion of businesses assigned to the Pembrokeshire Coast Path state that the path is promoted around the right amount (35% v 20%), while 60% of businesses do not think that the path is promoted enough.

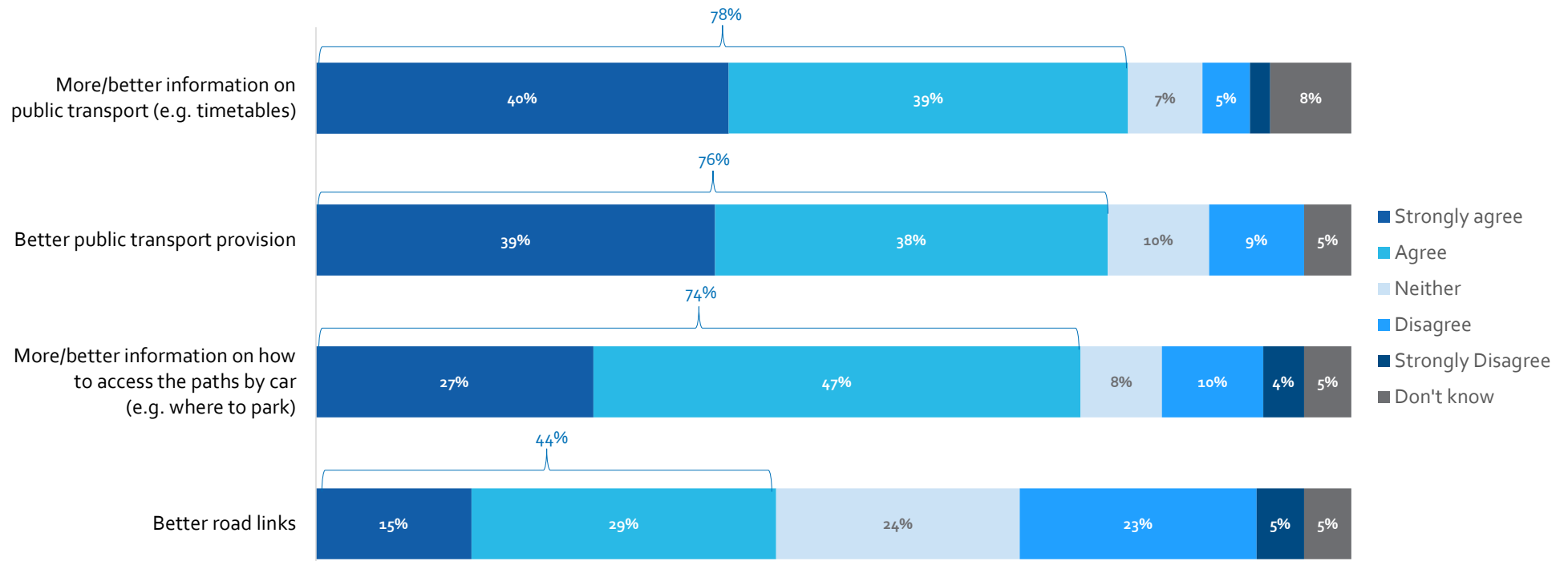
Overall, do you think the path is promoted...?



Base: All respondent assigned to the Pembrokeshire Coast Path (510) Q19. Overall, do you think the Pembrokeshire Coast Path is promoted...?

## Encouraging visits

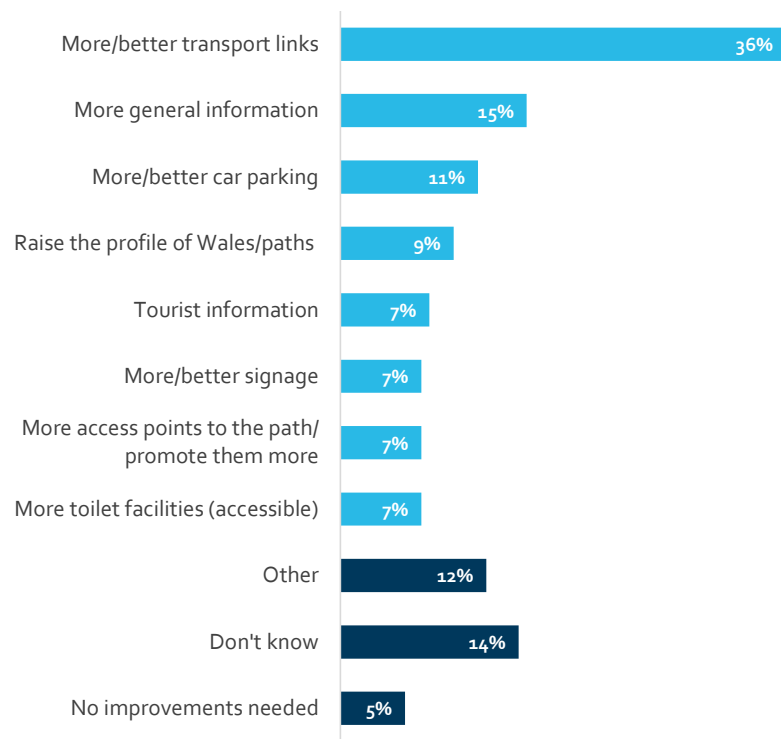
Above all else, businesses along the Pembrokeshire Coast Path agree that, to encourage more people to visit, more information needs to be shared about public transport links (78% agree). 76% agree that public transport provision needs improving. Road links are seen as the least important factor to improve (44% agree this is needed).



**Base:** All respondent assigned to the Pembrokeshire Coast Path (153) Q21. To what extent, do you agree or disagree that each following are needed to encourage more people to visit the Pembrokeshire Coast Path? \*Note – data labels <3% not show for neatness.

## Improving access

36% of businesses recommend improving transport links to improve access for visitors. This is followed by more general information about the route.



"As someone that lives 3 miles away, I can't get home via public transport. There is a chronic need for transport links in the park or area as a general. Getting local people to work as well as those that can't afford a car. Needs to have a more accessible, affordable public transport system. The path needs to look outwards not inwards."

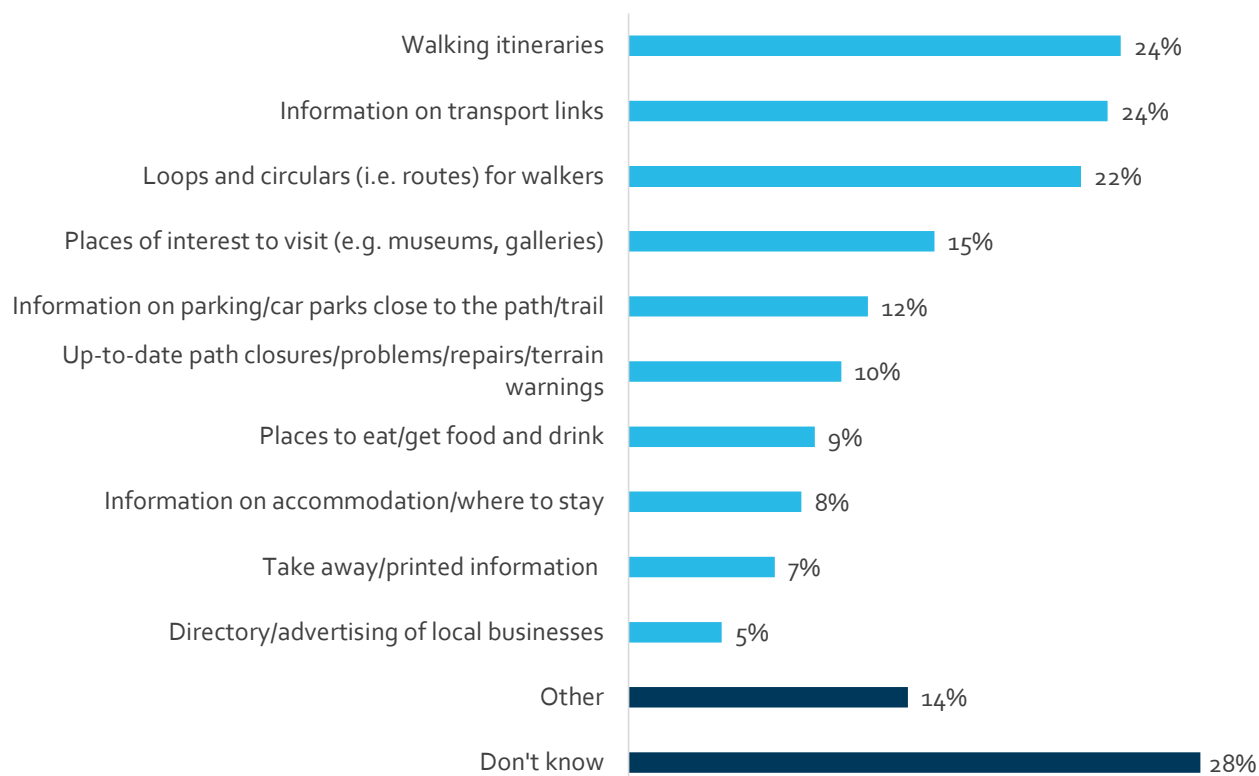
"More car parks dedicated to access the coast path to alleviate issues in busier areas and tourist hotspots."

"I think it would be important to improve things for people with disabilities. Impossible mission maybe, but I think that is what we are missing this side of the world."

**Base:** All respondent assigned to Pembrokeshire Coast Path (153) **Q22.** What improvements (if any), do you think are needed to help more customers or visitors travel around or access the path? \*note – mentions <5% not shown.

## Information to support business customers or path users

The most frequently mentioned types of information that businesses say they believe that their customers would find most useful in relation to the Pembrokeshire Coast Path is the provision of walking itineraries and information on transport links (both **24%**).



### 'Other' responses

"Information on it's history; how people use to live."

"What's its like under foot? hilly, rocky etc."

"Tide timetables pertinent to particular parts of coastal path (localised tide timetables)."

**Base:** All respondents (1012) **Q30.** What kind of information do you think would be most helpful to your customers or other users of the Pembrokeshire Coast Path? \*Note – responses <5% not shown.

# Conclusions and recommendations





## Conclusions

71% of businesses state that the Pembrokeshire Coast Path has some benefit on their businesses. This is significantly greater than average (for all routes).

In particular, 62% of businesses agree that the presence of the path has increased the number of visitors to their organisation. 56% believe that it has increased their sales or turnover.

**The majority of businesses are happy with the maintenance of the path furniture**

However, those along the Pembrokeshire Coast Path show concern over the public transport provision for travelling around the path (44% poor/very poor) and its accessibility for those with limited mobility or buggies (54% poor/very poor).

**Businesses assigned to the Pembrokeshire Coast Path are significantly more likely than average to specifically mention the path in their marketing materials.**

56% also mention the path via word of mouth.

## Recommendations

Given that the Pembrokeshire Coast Path has a notable positive impact on visitor numbers and sales, you may wish to consider further leveraging this.

This higher-than-average perceived increase confirms the significance of the route and how important it is for the route to be maintained, improved and promoted where possible to bring further prosperity to the area.

**It may be beneficial to explore ways to improve public transport and enhance accessibility around the Pembrokeshire Coast Path, particularly for those with limited mobility or using buggies.**

This could help make the path more welcoming and enjoyable for a wider range of visitors.

**Encouraging businesses near the Pembrokeshire Coast Path to continue featuring the path in their marketing materials, while providing them with diverse promotional resources, could strengthen both direct marketing efforts and word-of-mouth promotion.**

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## Conclusions

60% of businesses along the Pembrokeshire Coast Path do not think that the path is promoted enough.

When asked in an open question what might help more customers or visitors travel around or access the path (particularly in relation to transport), the top response was to improve the transport links (36%).

When asked what information could be provided to support businesses' customers or path users, the top recommendation was to provide walking itineraries for walkers.


24% also feel that their customers would benefit from more information about transport links.

## Recommendations



Consider launching a targeted marketing campaign to raise the profile of the Pembrokeshire Coast Path, along with improving transport links.

These efforts could address concerns about the current level of promotion and help attract more visitors to the area.



Consider developing materials that combine walking itineraries with detailed information about transport links.

Providing these resources to local businesses would help their customers plan their journeys more effectively, ensuring they have both the walking routes and transportation options needed for a smooth and enjoyable experience.