

Wales Coast Path – South Coast Business Survey 2024

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Wales Coast Path - South 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 South 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 **106 are located along the South 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 South Coast and were assigned to the Wales Coast Path (106).

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

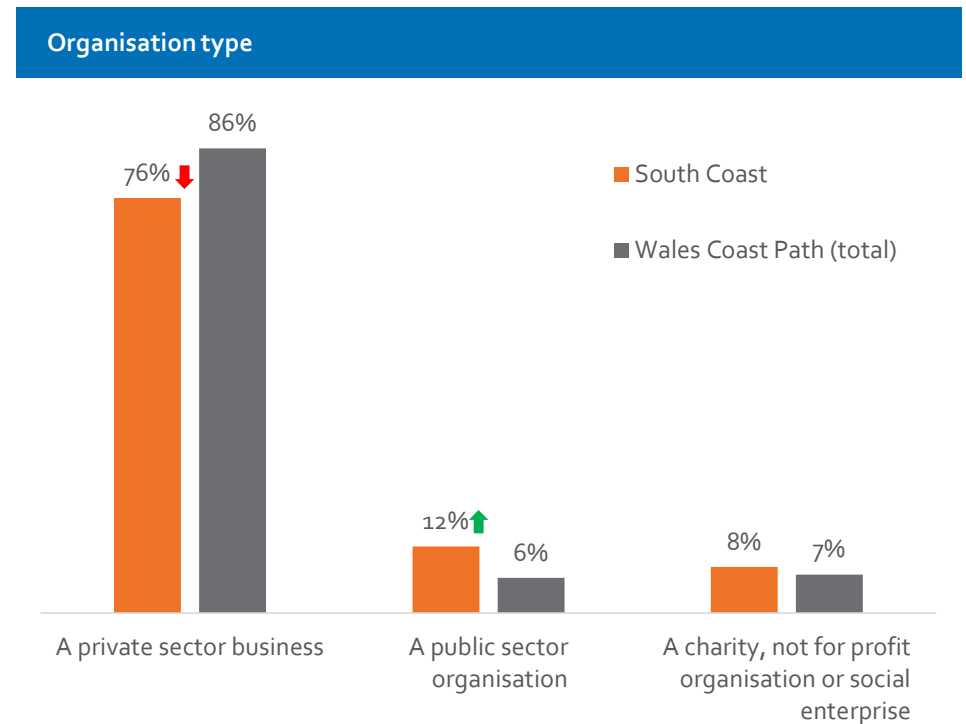
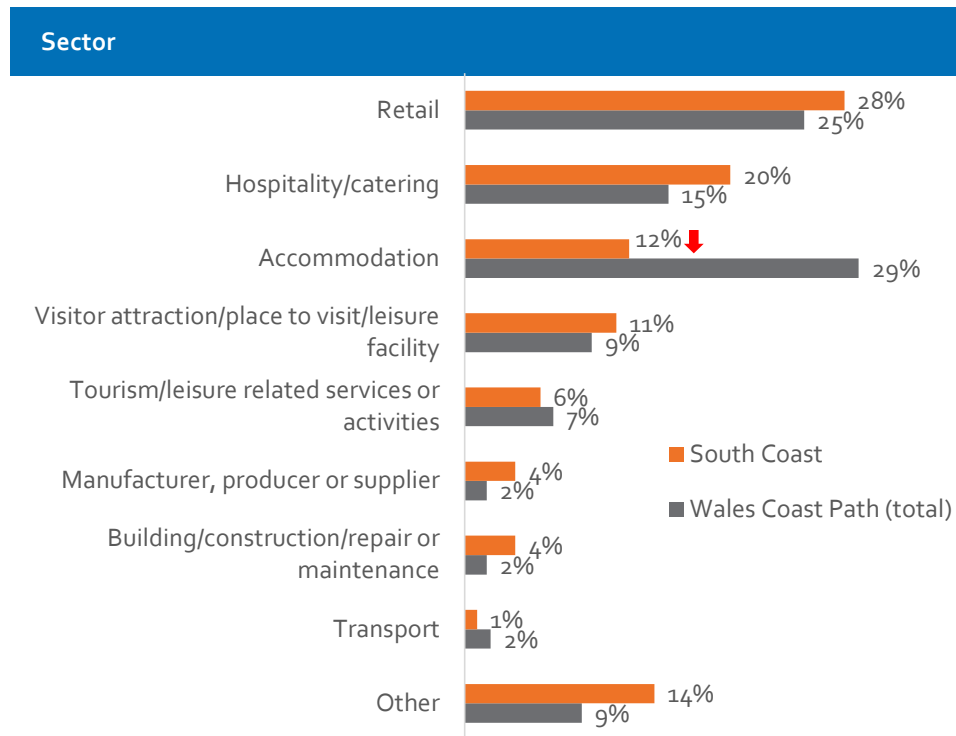
In this report, results for those based along the South Coast and assigned to the Wales Coast Path are compared to the average figures from the total sample of businesses assigned to the Wales Coast Path, regardless of business location. The combined average is labeled as "Wales Coast Path (total)" in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

Business profiles (I)

The 106 businesses along the South Coast represent a range of sectors - 28% are in the retail sector and 20% are in hospitality/catering sectors. A further 12% work in accommodation. Overall, 76% of these businesses are in the private sector, with another 12% being public sector businesses.



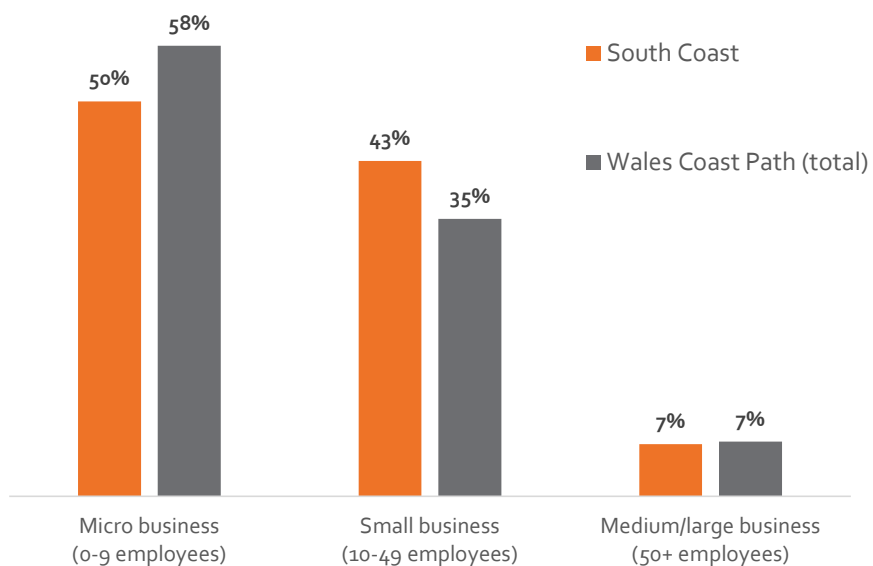
Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path) (106).
 Q05B. Which of the following best summarises your main business activities? Co1. Which one of the following best describes your business?

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

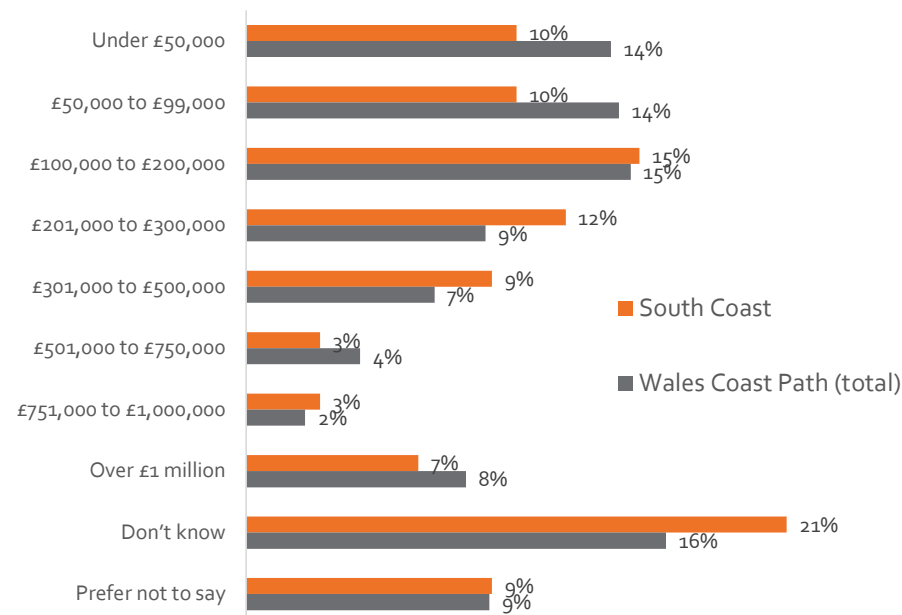
Business profiles (II)

Most of the businesses along the South Coast employ less than 50 staff members. Micro businesses with a workforce of 0-9 employees make up 50% of our sample. Another 43% are small businesses with 10-49 employees. Looking at turnover, the highest proportion – 15% - state a turnover of £100-200,000 per year. In total, 47% of businesses have a turnover of £300,000 or less.

Business size



Turnover

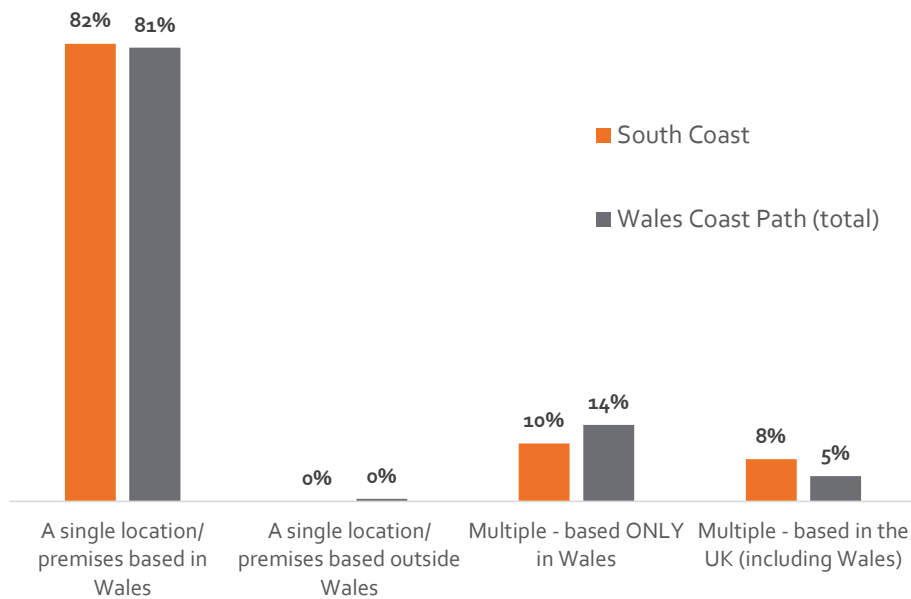


Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path)(106) **Q07A/B.** Including yourself, how many permanent full and part time staff are employed by your business? **Co2.** What was the approximate turnover of your business (or sales value) in your last financial year? .

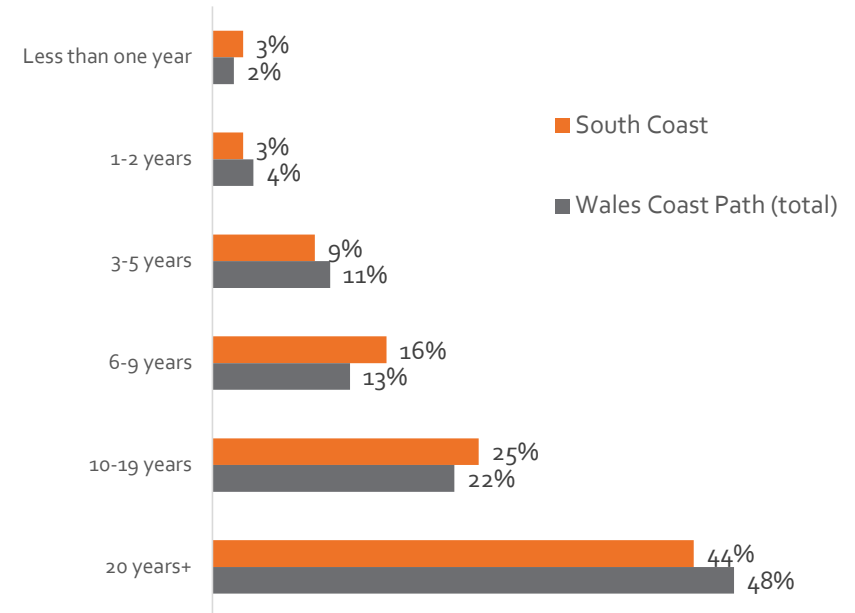
Business profiles (III)

Just less than half (44%) of the businesses on Anglesey that we spoke to have been established for 20+ years, with another 25% being in operation for 10-19 years. Very few were newly established businesses. 82% of businesses we spoke to along the South Coast operate out of a single location in Wales. 10% have multiple locations across Wales.

Number of premises



Business tenure

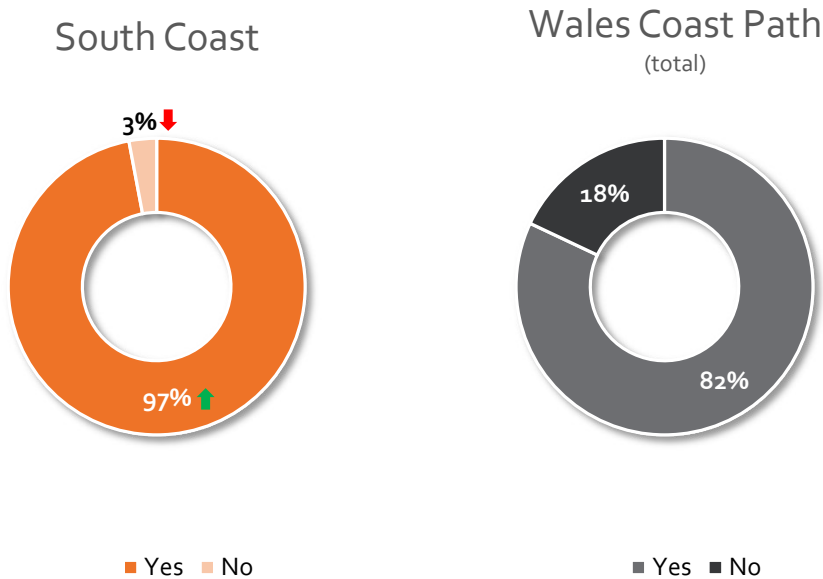


Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path)(106) . **Qo6.** Does your business operate from a single location or premises, or multiple locations or premises? **Co4.** Approximately how long has your business been operating from this location from?

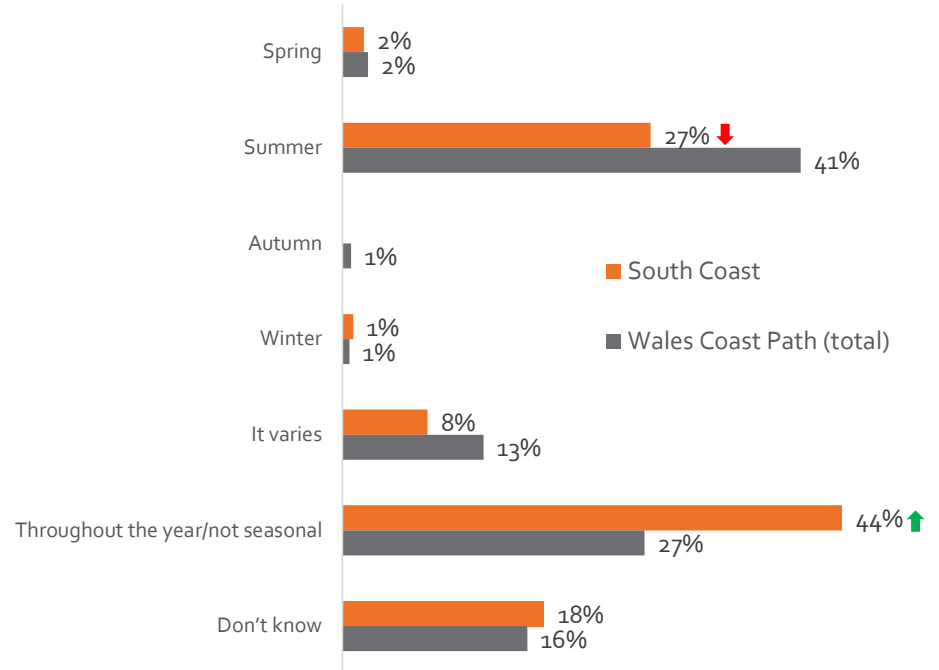
Business profiles (IV)

97% of businesses along the South Coast are open all year round. This is significantly more than the average business along the Wales Coast Path, nationally (82%). For 27%, business is most likely to peak during the summer months. However, businesses along the South Coast are significantly more likely to report that their business is not seasonally affected compared with the average across the Wales Coast Path (44% v 27%).

Business open all year



Peak season



Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path)(106).
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?

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

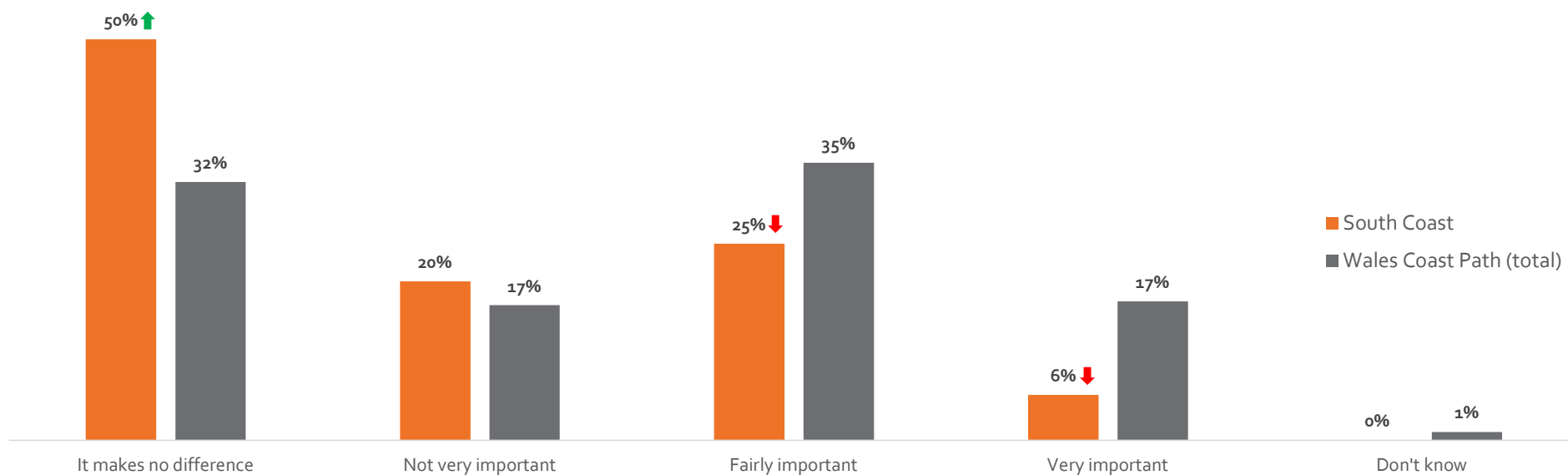
Wales Coast Path - South Coast

Importance of the path to business

Business profiles – path specific

30% of businesses along the South Coast consider the path to be fairly or very important to the success of their business, with 6% reporting that it is 'very important'. In contrast, 50% say that the path does not benefit the success of their business at all. This is 18% points higher than the average for all businesses along the Wales Coast Path (32%).

Importance of the path to the success of businesses



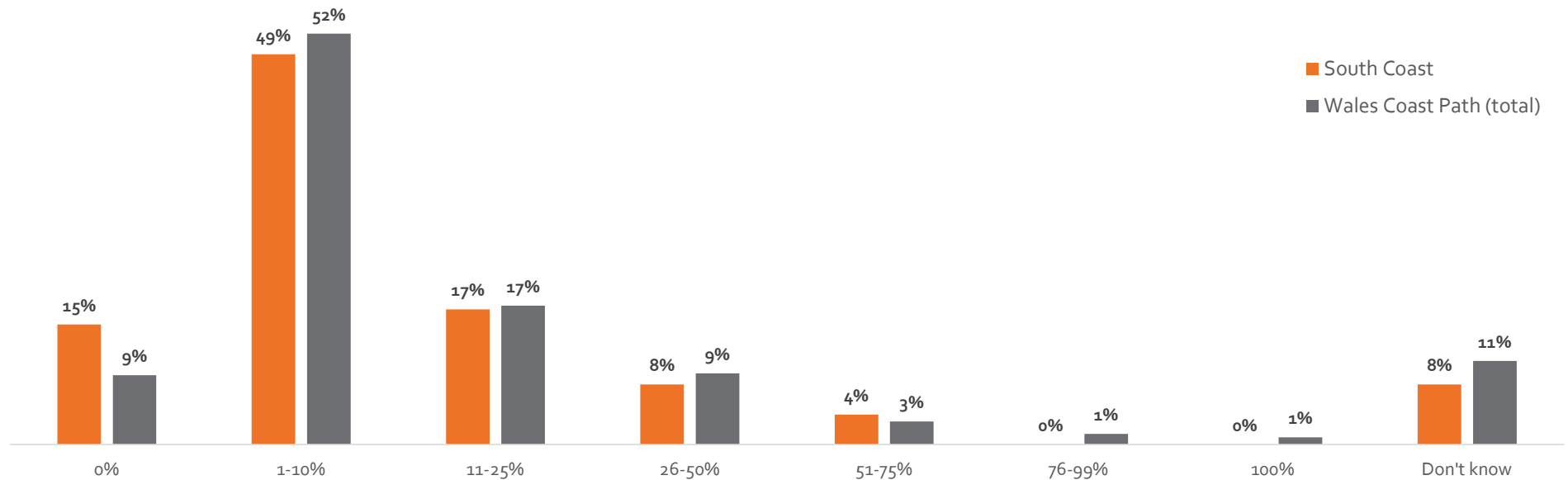
Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the South Coast visitor region (and also assigned to the Wales Coast Path (106).
Qo2. How would you describe the importance of the path to the success of your business?

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

Business profiles – path specific

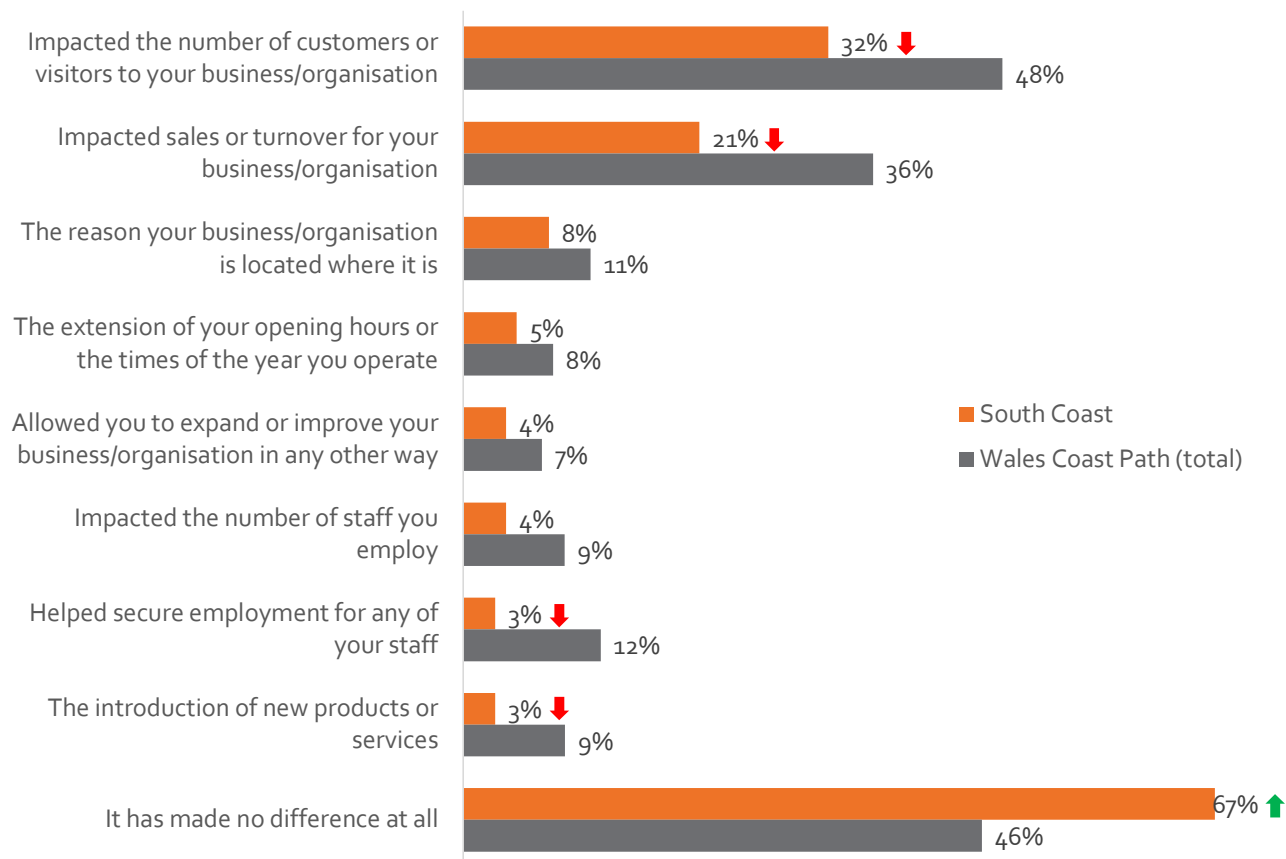
For 49% of businesses along the South Coast, the Wales Coast Path generates up to 10% of their sales/turnover. Another 25% say that the path generates 11-50% of their sales/turnover.

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 South Coast that indicate the path has some importance to their business (53) 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



32% of businesses along the South Coast agree that the presence of the Wales Coast path has increased the number of visitors to their business, with another 21% stating that it has benefitted their turnover. The prevalence of both benefits along the South Coast are both significantly lower than the proportion of businesses sighting the same along the Wales Coast Path, nationally.

In fact, for 67% of businesses here, the presence of the path has made no difference. This is significantly higher than the Wales Coast Path average (46%).

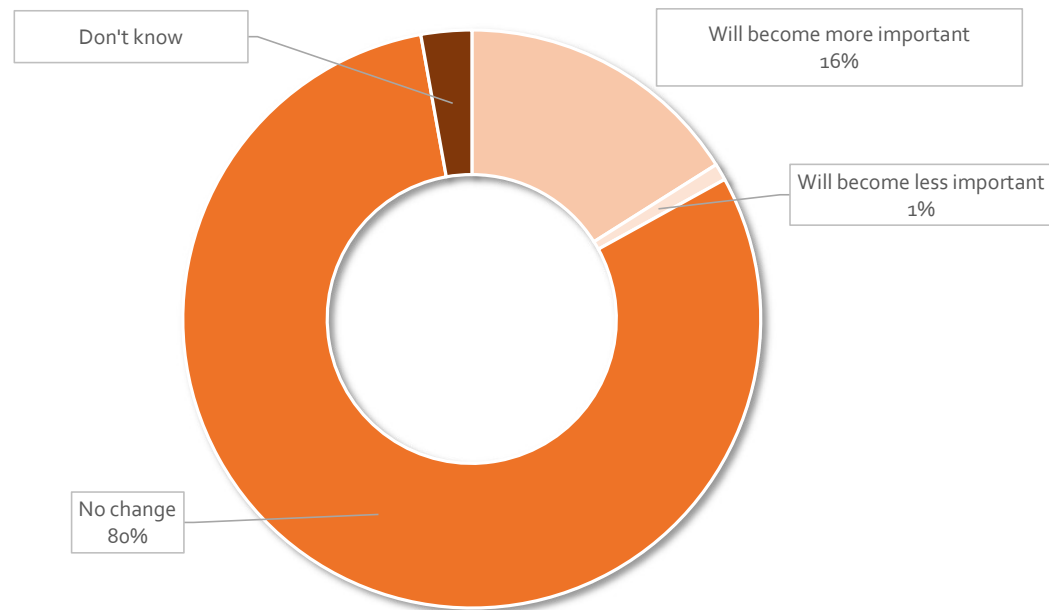
Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path) (106) Q24a. Do you think the presence of the Wales Coast Path has resulted in or contributed to any of the following for your business?

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

Importance of the path to businesses

16% of businesses along the South 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, 80% expect no change in the future.

Change in importance of the path to business/organisation success



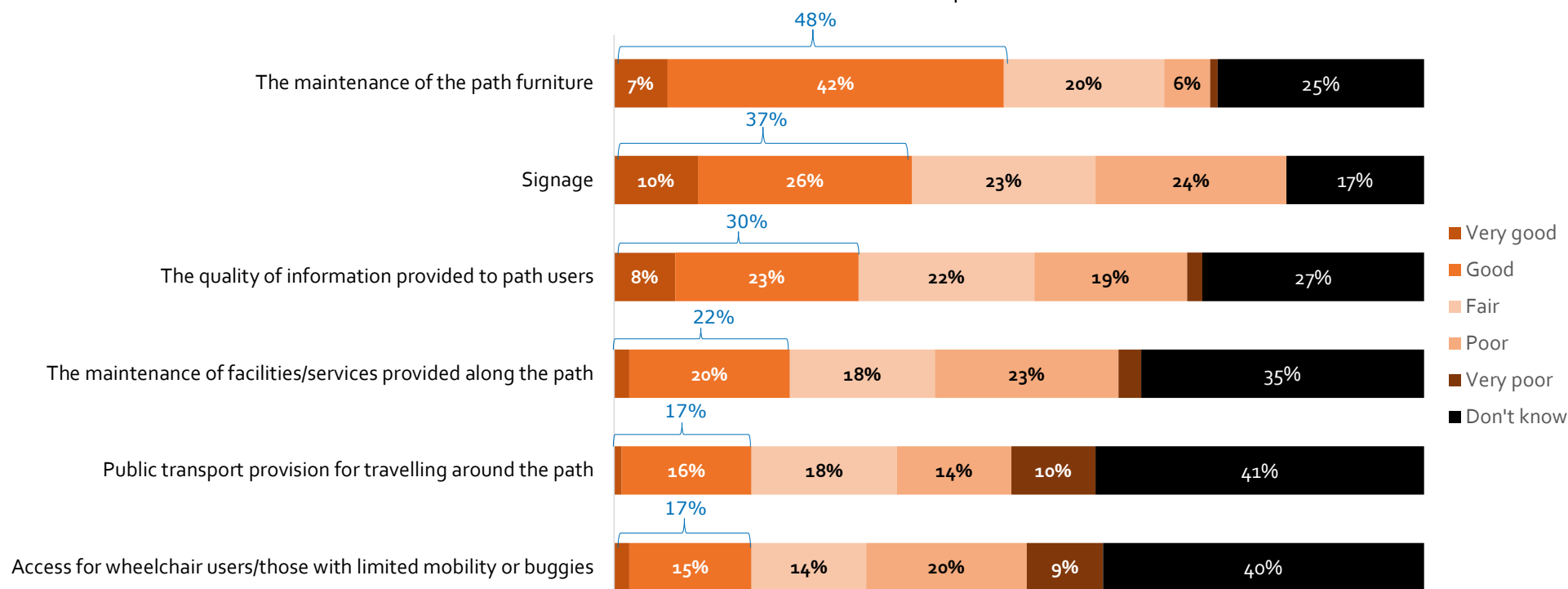
Base: All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path)(106) **Q25a.** Do you consider that in the future there will be any change in the importance of the Wales Coast Path to the success of your business? **Base:** Where path will become more important (16) **Q25b.** Why is that?

Wales Coast Path - South Coast

Path quality

Perceptions of aspects of the path

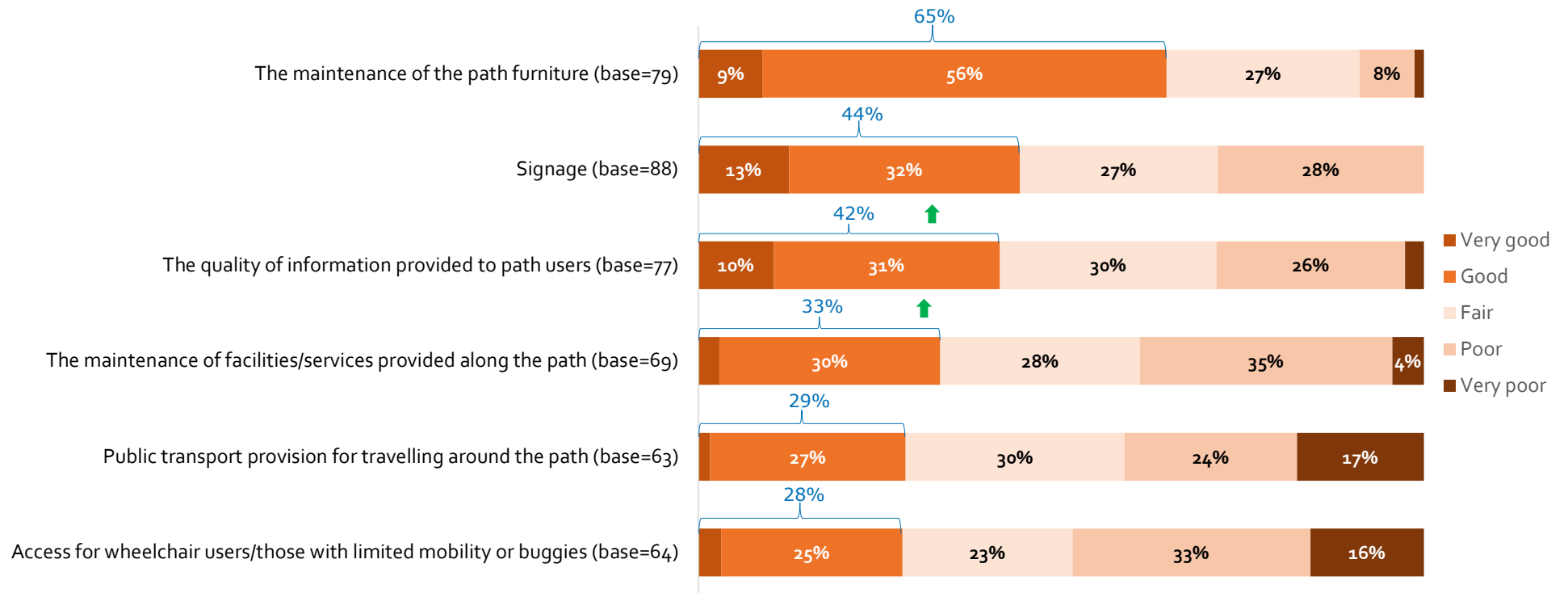
All businesses were presented with a list of six aspects and asked to rate each one. Of all the aspects rated, businesses are most positive with the maintenance of the path furniture (48% good/very good) and signage (37% good/very good). They are least positive about the path accessibility and public transport provision (both 17% good/very good). However, a significant proportion of businesses (17-41%) 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 South Coast visitor region (and also assigned to Wales Coast Path)(106) Q20. How would you rate each of the following aspects?
Data labels <5% not shown

Perceptions of aspects of the path

When excluding 'don't know' responses, ratings of the maintenance of path furniture remains most positive (65% good/very good), followed by signage, with 44% of those aware rating this as good/very good. Unfortunately, dissatisfaction with path accessibility increases, reaching 49% poor/very poor compared to 29% with don't know responses included.



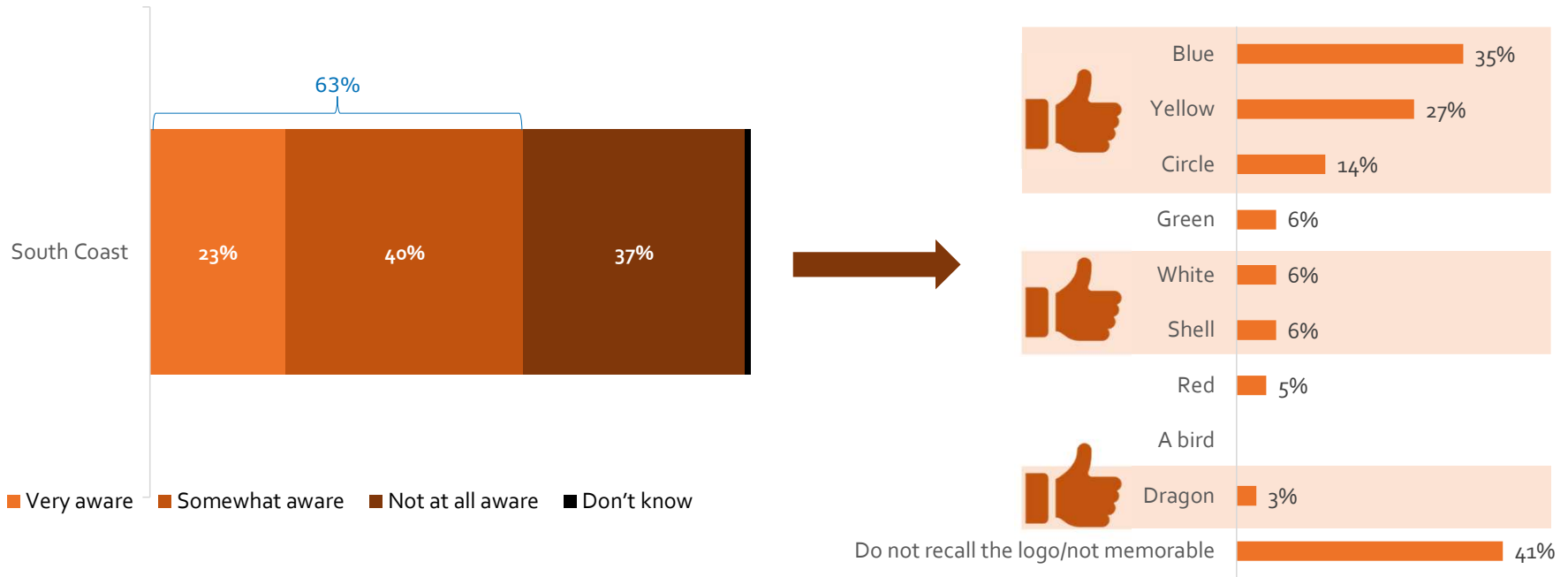
Base: All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path)(106) **Q20.** How would you rate each of the following aspects?
 *Base varies by statement due to the removal of 'don't know' responses. Data labels <5% not shown

Wales Coast Path - South Coast Path promotion



Branding Awareness

63% of the South Coast region businesses have at least some awareness of the path's branding (vs. 71% on average for Wales Coast Path in total), with 23% of businesses stating they are 'very aware'. However, when those respondents were asked to describe the logo, not all got the details correct. 35% correctly stated that the logo is blue, and 27% say that it is yellow, but only 6% recall that it is white and 6% correctly state that the logo represents a shell. Conversely, 41% state that the logo is not memorable.

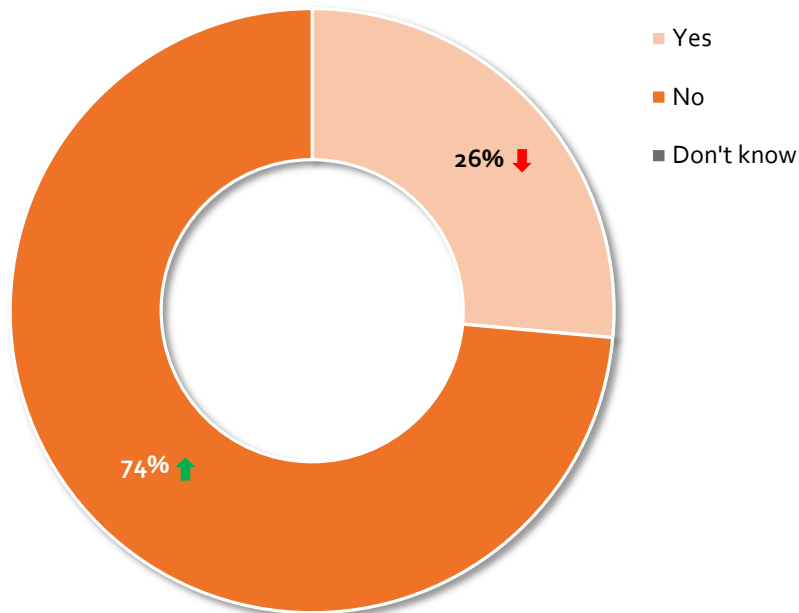


Base: All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path)(106) **Q10.** To what extent are you aware of the branding for the Wales Coast Path or how it's promoted? **Base:** All respondents along the South Coast who are aware of the branding for the Wales Coast Path or how it's promoted (66) **Q11.** How would you describe the branding (i.e. logo) of Wales Coast Path?

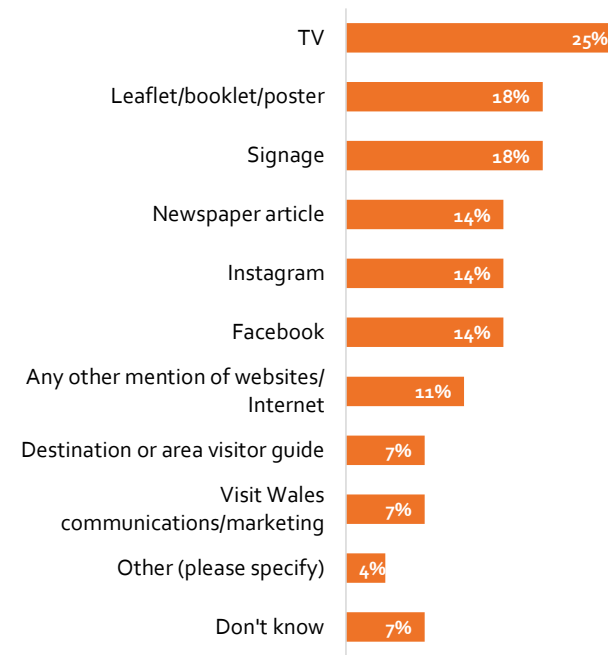
Advertising awareness

26% of businesses in the South Coast region have seen some publicity or advertising related to the path over the last 12 months. This is significantly lower than the proportion of businesses along the Wales Coast Path nationally who say the same (38%). Amongst the 28 businesses that have seen advertising, it is most likely to have been seen via TV, leaflet or signage.

% seen publicity/advertising



Where publicity/advertising seen*



Base: All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path)(106) **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 South Coast who have seen or heard publicity, advertising or information (28) **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

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

Perceptions of advertising

All 28 businesses along the South Coast who have seen or heard any publicity, advertising or information about the Wales Coast Path were asked to provide feedback on the frequency and effectiveness (in terms of attracting visitors/users and helping/impacting the future success of businesses). 86% of these businesses rate the 'effectiveness' of recent publicity to attract users as 'fair' or 'good' (compared to 81% for the Wales Coast Path nationally). Additionally, 68% feel the frequency of advertising is fair/good (compared to 76% for the Wales Coast Path nationally).

"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	Neutral	Poor	Don't know
Frequency	29% (35% total)	39% (41% total)	29% (18% total)	4% (5% total)
Effectiveness in terms of attracting visitors/users to the path/trail	54% (50% total)	32% (31% total)	11% (11% total)	4% (8% total)
Effectiveness in terms of helping or impacting the success of your business/organisation	21% (30% total)	18% (34% total)	25% (18% total)	36% (18% total)

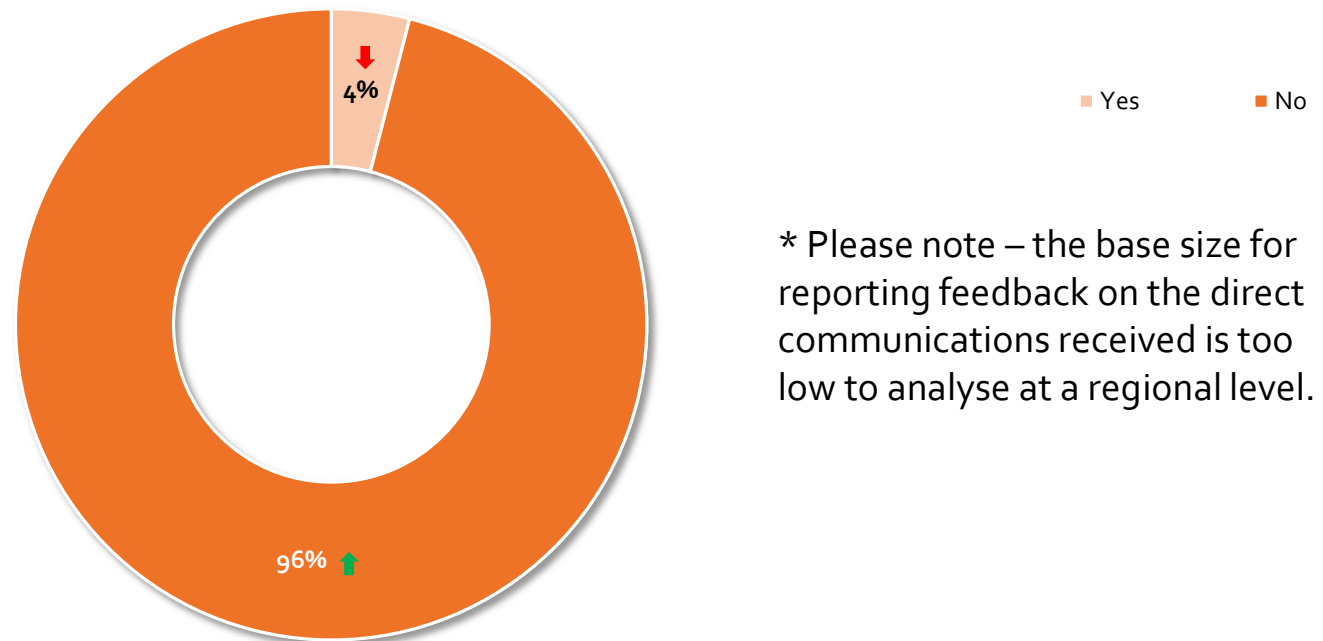
Base: All businesses assigned to the Wales Coast Path who have seen or heard publicity, advertising or information (255), All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path including Pembrokeshire) who have seen or heard publicity, advertising or information (28) **Q14.** How would you rate the publicity, advertising or information you have seen or heard about the Wales Coast Path in the past year, in terms of...?

*CAUTION – Low base size

Receipt of direct communications

Just 4% 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.

Base: All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path including Pembrokeshire (106) Q15. Over the past year, do you recall receiving any direct communications about the Wales Coast Path?

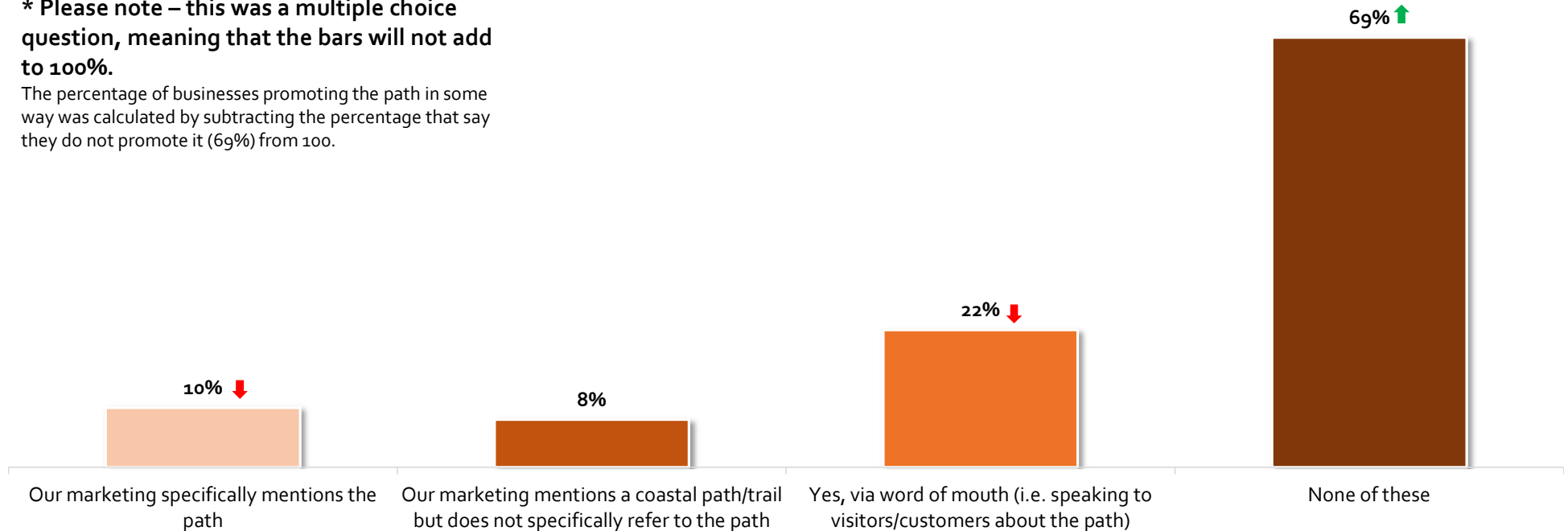
↓ ↑ Significantly higher/lower than Wales Coast Path (total)

Path promotion by businesses

31% of businesses promote the Wales Coast Path in some way, with 10% stating that the path is specifically mentioned in their marketing materials. This is significantly lower than the proportion of businesses along the Wales Coast Path nationally (53%). A further 22% promote the pathway via word-of-mouth (also significantly lower than the 40% doing so along the Wales Coast Path nationally), and 8% mention the path, but not by name.

*** 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 (69%) from 100.



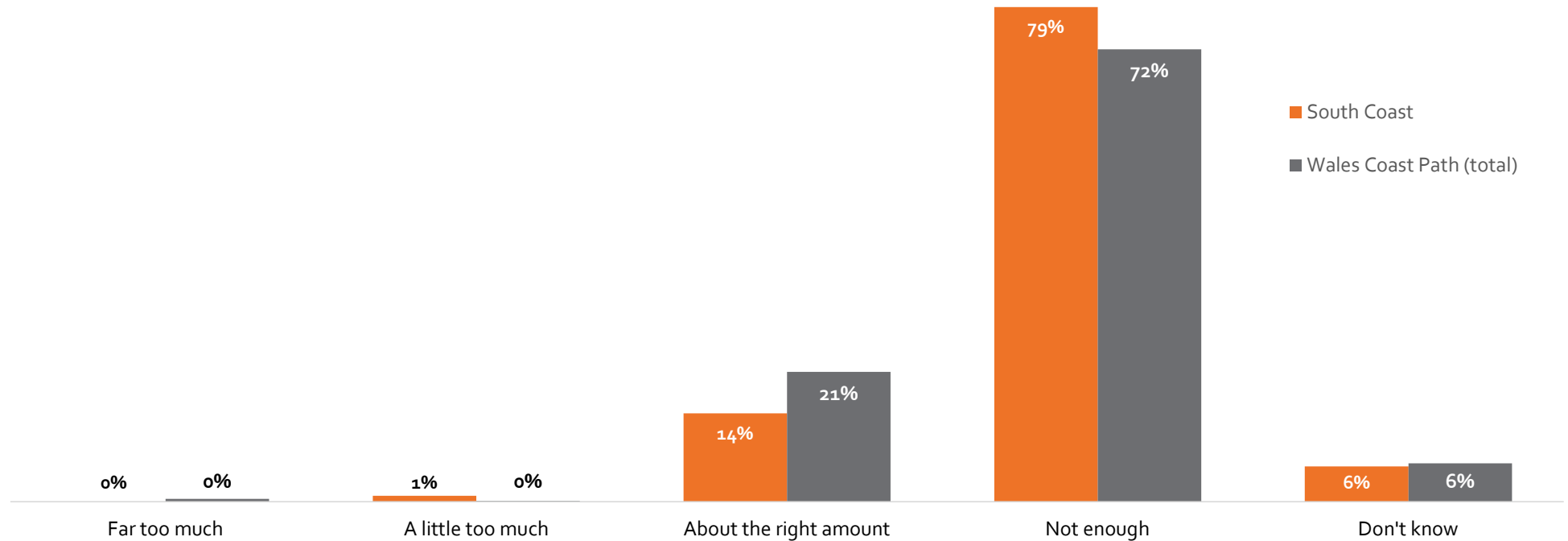
Base: All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path) (106) **Q17.** Do you mention or promote the Wales Coast Path in any of your own marketing materials, for example on your website or social media channels, or when speaking to your customers?

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

Path promotion

An overwhelming 79% of businesses along the South Coast think the Wales Coast Path is not promoted enough. Just 14% say it is promoted about the right amount (vs 21% for the Wales Coast Path total).

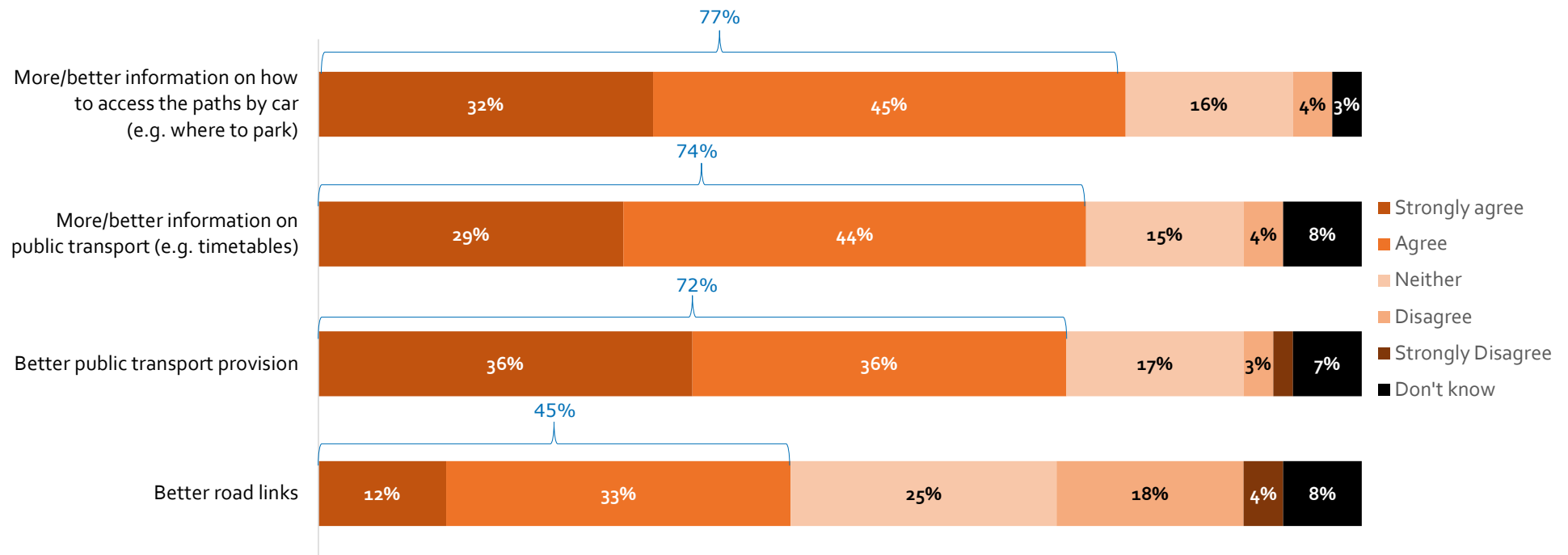
Overall, do you think the path is promoted...?



Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path) (106) Q19. Overall, do you think the Wales Coast Path is promoted...?

Encouraging visits

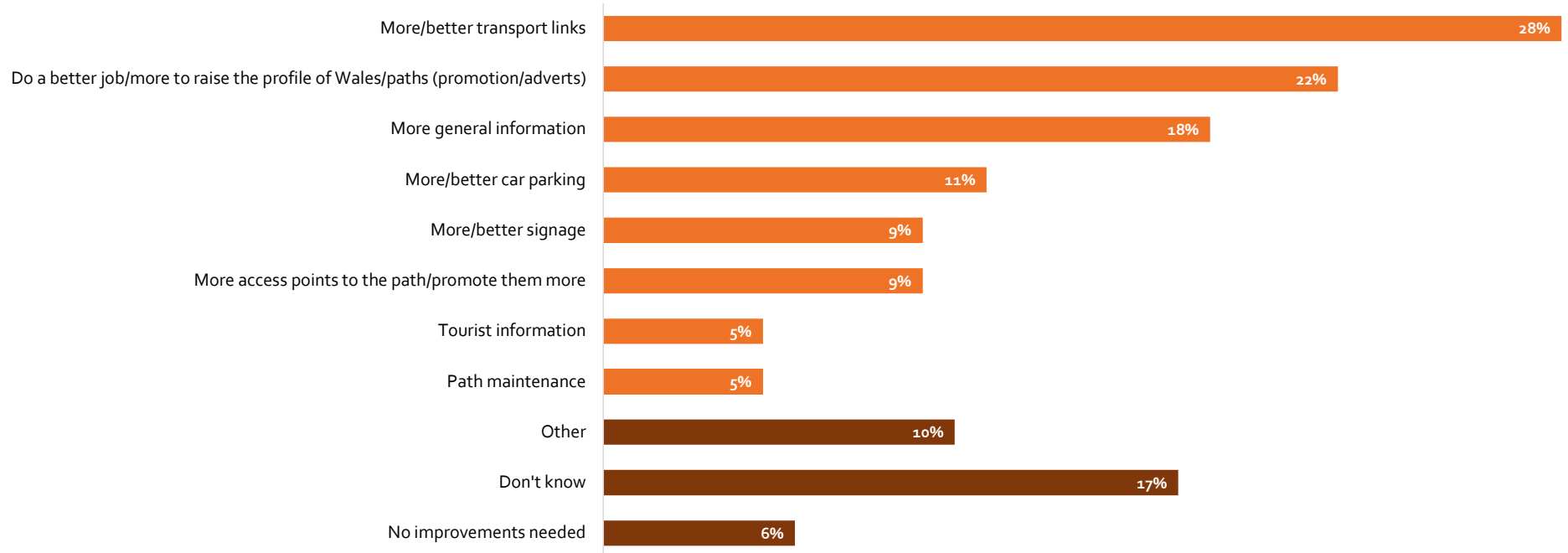
Businesses were presented with four potential improvements to the path and asked to state to what extent they agree or disagree whether they are needed. 77% of businesses feel that more/better information on how to access the path by car is needed. This is closely followed by more/better information on public transport such as timetables (74%) and better public transport provision (72%). On a more positive note, only 45% of businesses think better road links are needed.



Base: All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path) (106) 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

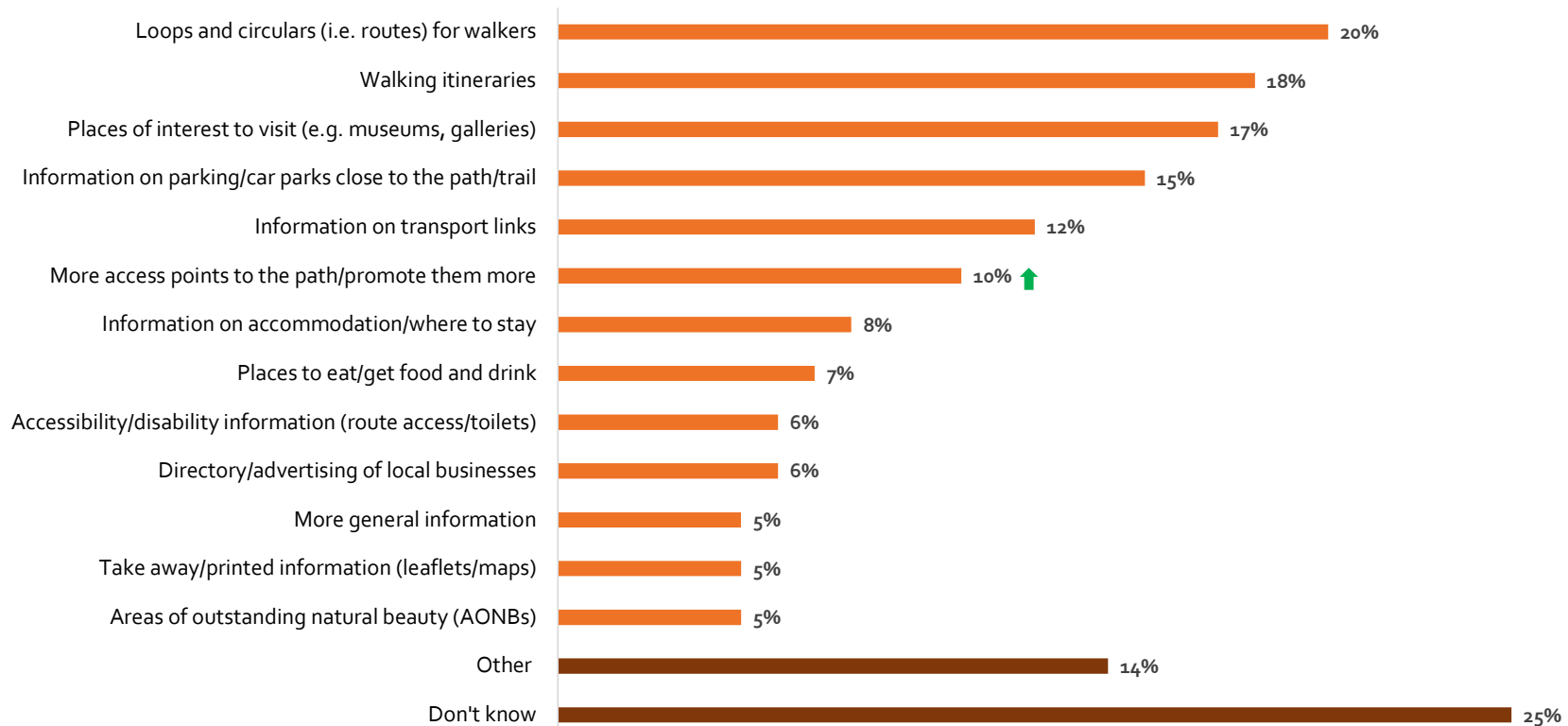
When asked in an open question what improvements are necessary to improve access, businesses' top recommendation for Wales Coast Path is to improve transport links (28%). Another 22% suggest that the profile of Wales and the Wales Coast Path should be raised via promotion and advertising. 18% feel that more general information about the path is needed to help customers travel around the path.



Base: All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path) (106) 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.

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 routes for walkers (20%), walking itineraries (18%), and places of interest (17%).



Base: All businesses located in the South Coast visitor region (and also assigned to Wales Coast Path) (106) 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 - South Coast Conclusions and recommendations



Conclusions

45% of businesses consider the path important to their success, with 16% expecting its importance to grow as tourism and path promotion increases.

The path already contributes to the turnover for many businesses, presenting opportunities to deepen this benefit.

Branding awareness can be expanded to strengthen recognition and engagement

63% of businesses are aware of the path's branding, but 41% feel the logo is not memorable, limiting its marketing effectiveness.

Access improvements could boost visitor numbers and business opportunities.

77% of businesses see a need for better car access information, 74% for improved public transport details, and 72% for better overall transport provision. Accessibility issues could limit visitor growth if not addressed.

Recommendations

▶ To further boost the path's benefit to businesses, consider coordinating with local tourism boards, councils, and businesses to develop joint promotional efforts.

Initiatives like "Path Experience" packages or themed itineraries, which combine local accommodation, dining, and attractions, would encourage visitors to stay longer and spend more in the area.

▶ Consider launching a comprehensive branding awareness campaign targeted at local businesses, providing them with physical signage, digital promotional kits, and co-branded marketing opportunities.

Business-focused workshops could help explain the benefits of integrating the path's branding into their marketing. This would ensure consistent messaging and stronger recognition among visitors.

▶ The company could work with local councils, transport providers, and tourism organisations to improve travel resources, such as car park maps, public transport timetables, and visitor-friendly signage.

Introducing seasonal shuttle services or coordinated transport initiatives could help during peak periods.

Conclusions

Enhanced visitor information can improve experiences and boost business engagement.

Businesses highlight the need for key visitor information, including walking routes (20%), itineraries (18%), and places of interest (17%).

Strong maintenance ratings provide a solid foundation for enhancements.

65% of businesses rate the path's furniture maintenance positively, but accessibility and transport-related facilities are areas of concern, with 49% expressing dissatisfaction.

Enhanced communication is needed to strengthen business engagement.

Only 4% of businesses recall receiving direct communications about the path, despite an existing newsletter.

Recommendations

Themed walking routes and itineraries that highlight local businesses, attractions, and services could be useful.

For example, routes like "Family Adventure Trails" or "Coastal Heritage Walks" could be promoted through the company's website and marketing channels. Collaborating with local businesses to feature these itineraries would create a mutually beneficial arrangement, encouraging visitors to explore beyond the path itself.

Consider partnerships with local councils and businesses, advocating for co-funded maintenance projects.

Sponsorship of path amenities like benches, viewing platforms, or picnic areas could be explored to offset costs while promoting local businesses.

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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