

Wales Coast Path – Ceredigion 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 - Ceredigion

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 in Ceredigion**.

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 in Ceredigion** 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.

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, are located in Ceredigion 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

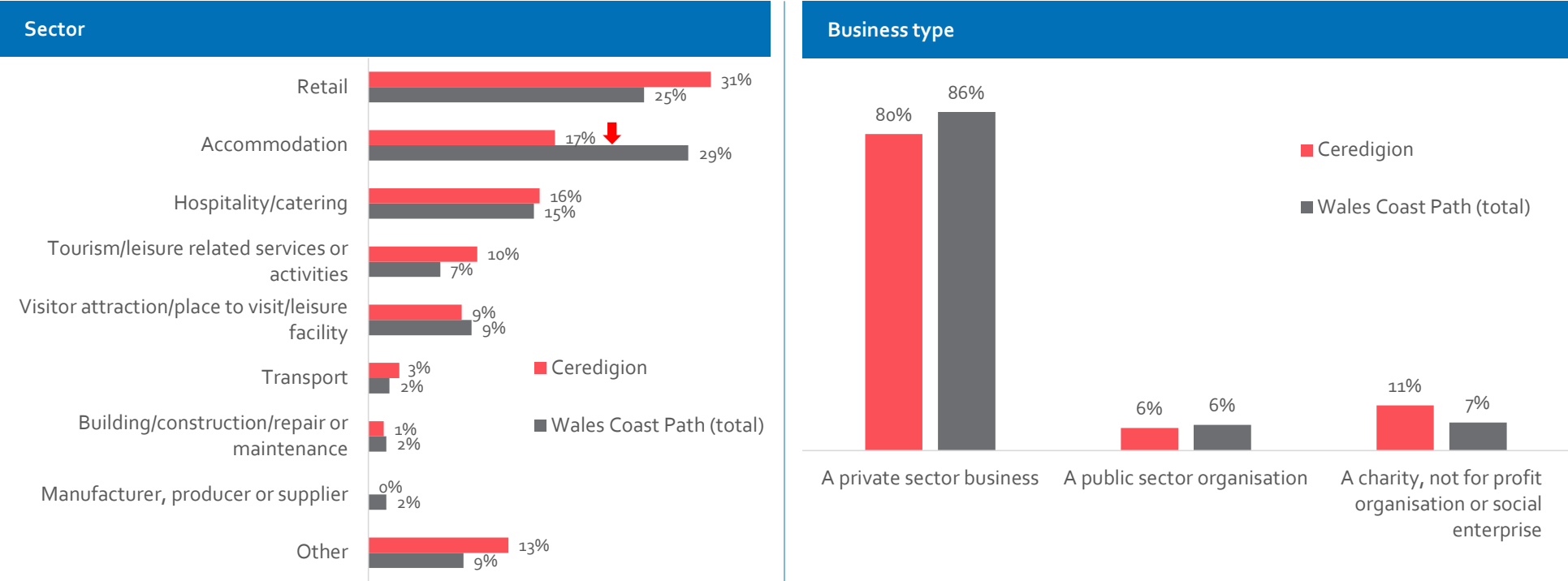
In this report, results for those based in Ceredigion and assigned to the Wales Coast Path are compared to the average figures from the total sample of businesses assigned to the Wales Coast Path, regardless of business location. The combined average is labeled as "Wales Coast Path (total)" in the comparison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

Business profiles (I)

The 70 businesses in Ceredigion represent a range of sectors, with 48% operating in the accommodation or retail sectors. A further 16% work in the hospitality and catering sector. Overall, 80% of businesses here are in the private sector.



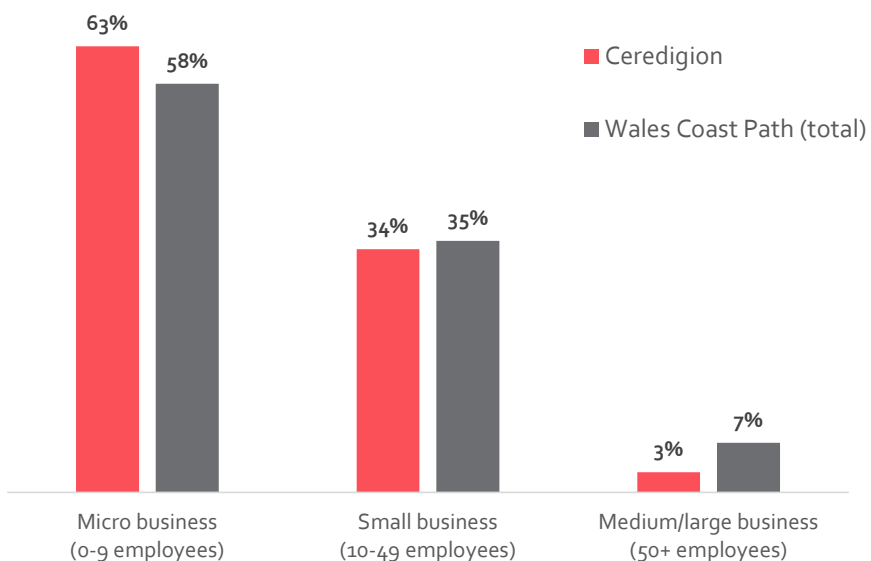
Base: Businesses assigned to the Wales Coast Path (664). All businesses located in the Ceredigion visitor region (and also assigned to the Wales Coast Path) (70). **Qo5B.** Which of the following best summarises your main business activities? **Co1.** Which one of the following best describes your business?

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

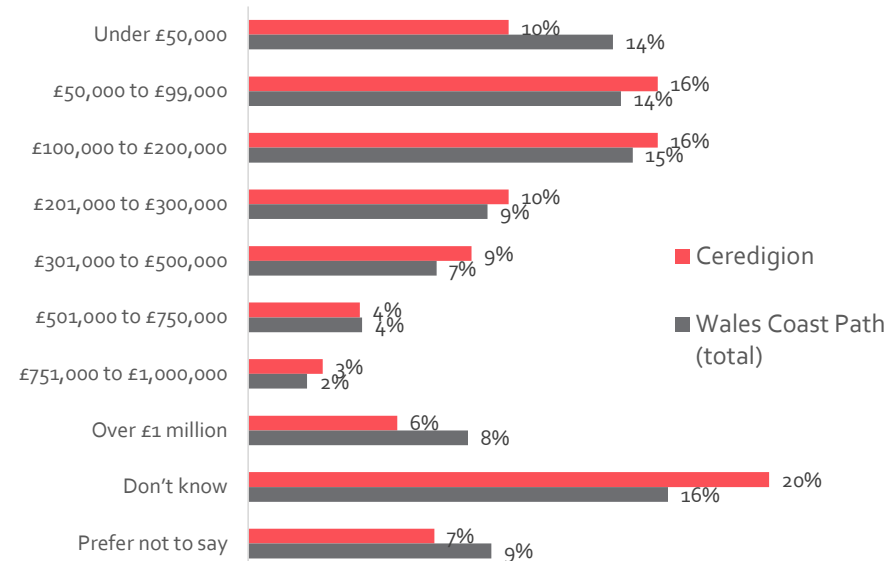
Business profiles (II)

Businesses in Ceredigion are slightly more likely than average to employ less than 10 people (63% v 58% for the Wales Coast Path, nationally). Though 20% say they don't know their average turnover, 52% of businesses in Ceredigion bring in £300,000 or less.

Business size



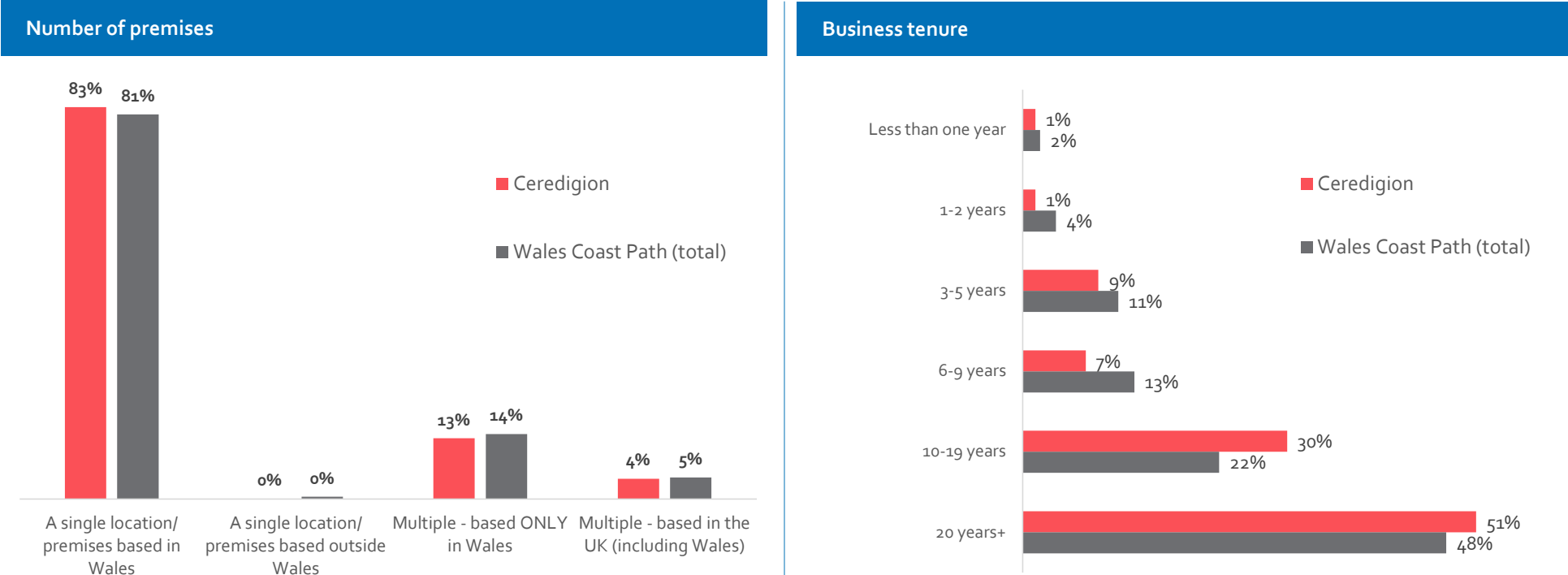
Turnover



Base: Businesses assigned to the Wales Coast Path (664). All businesses located in the Ceredigion 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? .

Business profiles (III)

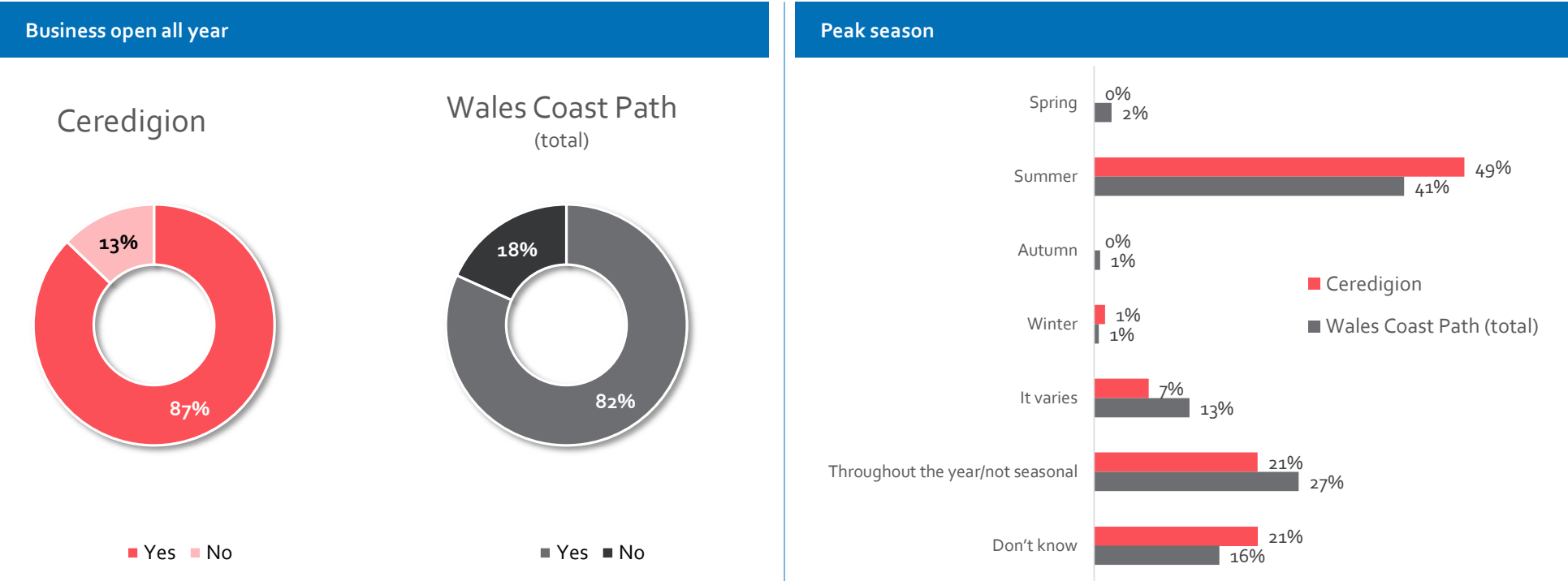
83% of businesses in Ceredigion operate out of a single location within Wales. 13% have multiple premises across Wales, and 4% have multiple premises, both inside and out of Wales. Businesses in this area are also more likely than average (WCP total) to be long-established, with 81% having been in operation for at least 10 years (vs. 70% of businesses along the Wales Coast Path, nationally).



Base: Businesses assigned to the Wales Coast Path (664).). All businesses located in the Ceredigion 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)

87% of businesses in Ceredigion are open year-round. Whilst 21% state that business remains steady throughout the year-round 49% state that business peaks in the summer months.



Base: Businesses assigned to the Wales Coast Path (664). All businesses located in the Ceredigion visitor region (and also assigned to the Wales Coast Path) (70) **Q9a.** is your business open all year? **Q9b.** 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?

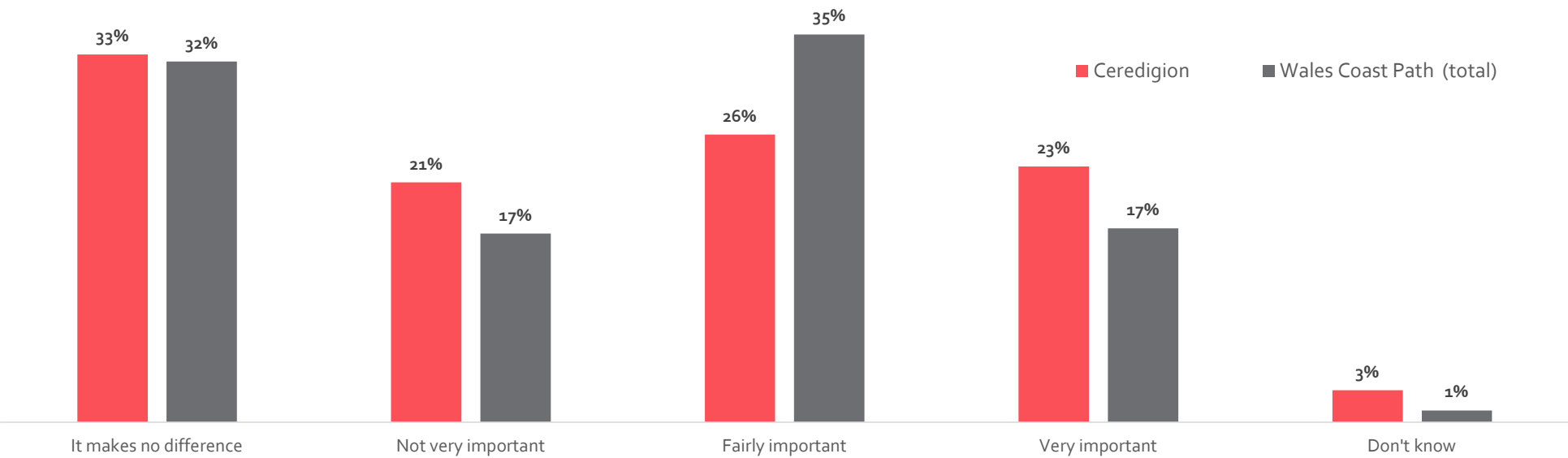
Wales Coast Path - Ceredigion

Importance of the path to businesses

Business profiles – path specific

49% of businesses here state that the path is at least fairly important to the success of their business, compared to 52% for the Wales Coast Path nationally.

Importance of the path to the success of businesses

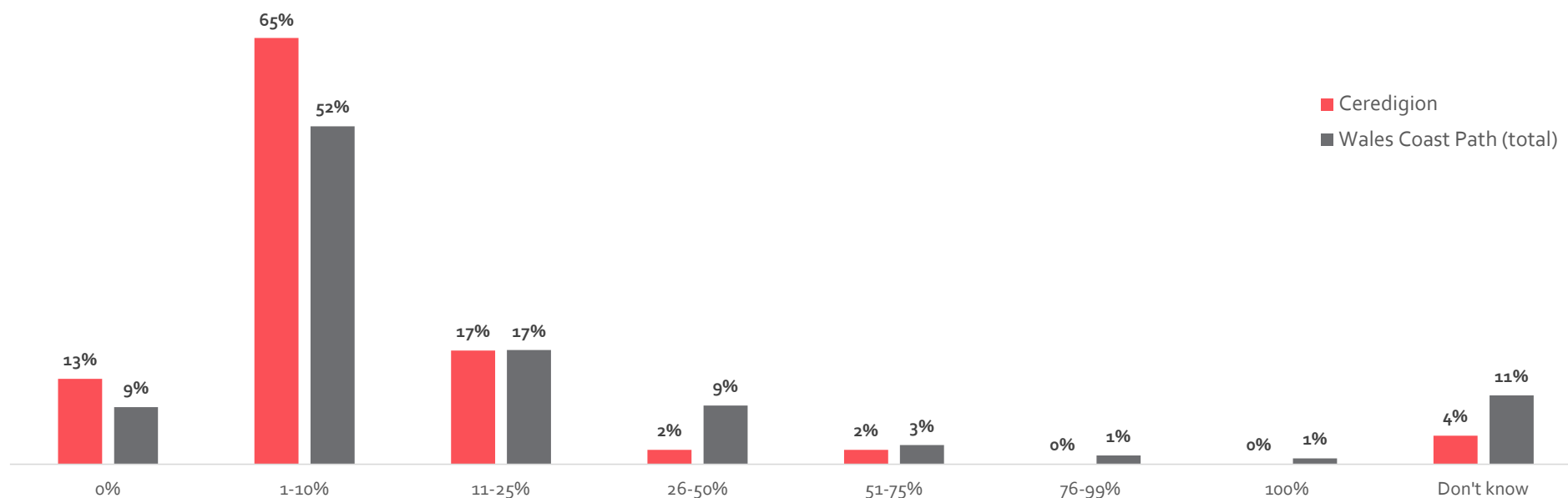


Base: Businesses assigned to the Wales Coast Path (664) **So3.** Does your business manufacture, sell or supply any products or services to people using or visiting any of the walking trails, or gain any form of benefit from the existence of the path? **Qo2.** How would you describe the importance of the path to the success of your business?

Business profiles – path specific

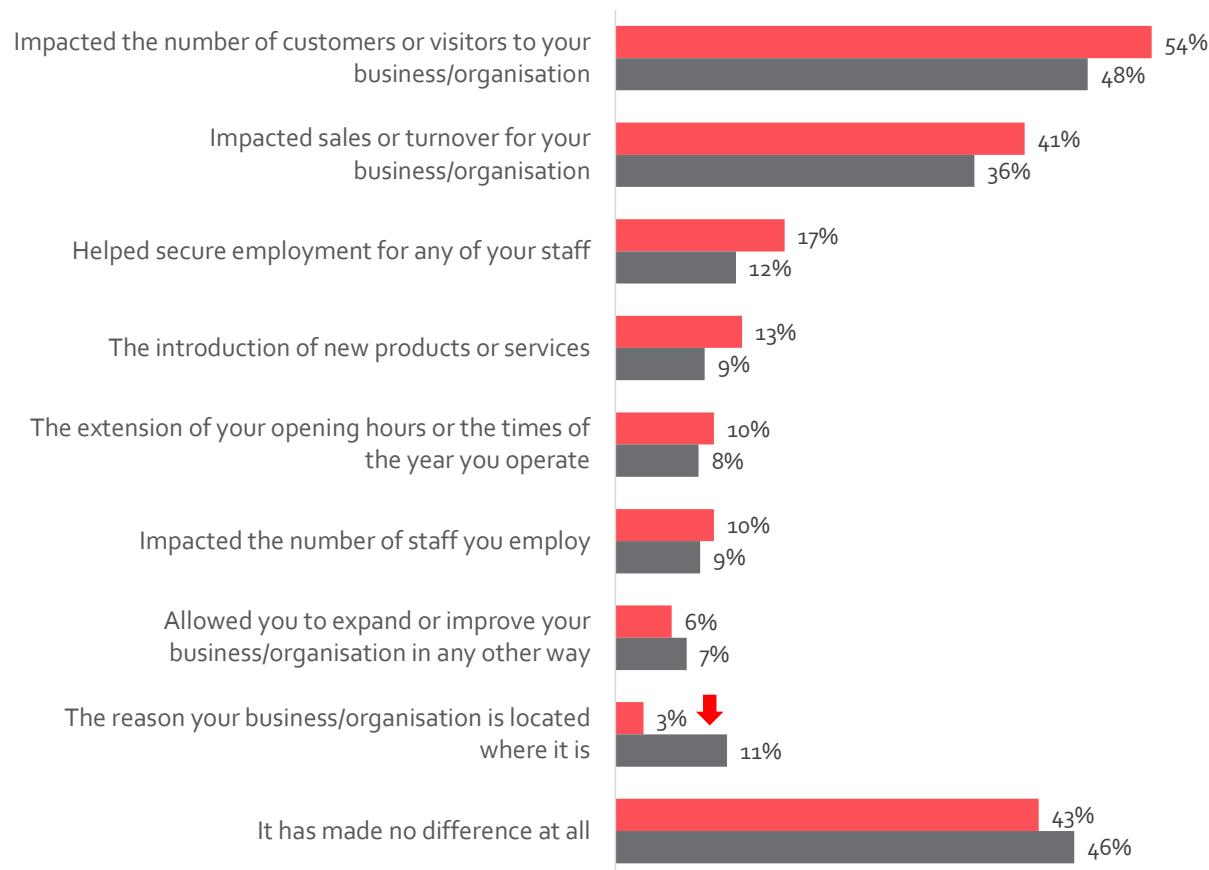
In Ceredigion, 65% of businesses say that path users contribute to 1-10% of their sales. Nationally, this figure is 52%, though the difference is not significant. Additionally, 19% of businesses report that the path generates between 11% and 50% of their sales.

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



Base: All businesses assigned to the Wales Coast Path and are operating in Ceredigion that indicate the path has some importance to their business (46), Businesses assigned to the Wales Coast Path (664) 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's existence on businesses





54% of the businesses in Ceredigion state that the existence of the Wales Coast Path has had some benefit to the number of customers or visitors to their business. This is slightly higher than that of the average business along the Wales Coast Path, nationally (48%).

Meanwhile, 41% say that their turnover or sales has been benefitted by the path and the visitors it attracts. 7% of this cohort say this has resulted in a large increase.

Businesses in this area are more likely than average (WCP total) to report experiencing various benefits, though the difference isn't significant. However, they are significantly less likely to say the path influenced their business location (3% vs. 11% WCP total).

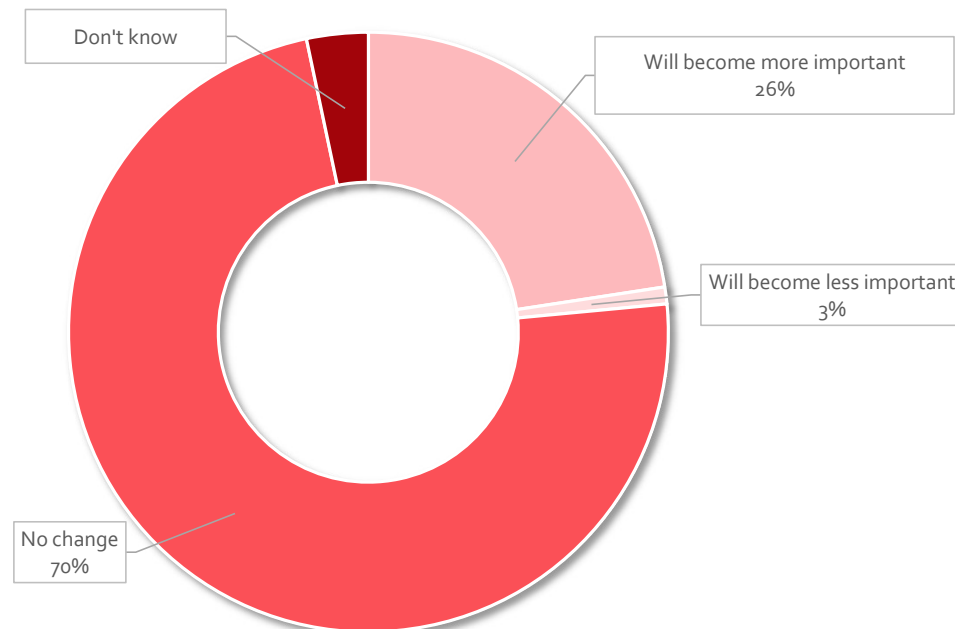
Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Ceredigion visitor region (and also assigned to the Wales Coast Path) (70). **Q24a.** Do you think the presence of the Wales Coast Path has resulted in or contributed to any of the following for your business?



 Significantly higher/lower than Wales Coast Path (total)

Importance of the path to businesses

26% of businesses in Ceredigion think the Wales Coast Path will become more important to their success in the future. However, the biggest proportion of businesses foresee no change in the path's importance (70%). Of those 20 businesses who do, the top reason is that any additional promotion of the path will help to increase tourism.

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



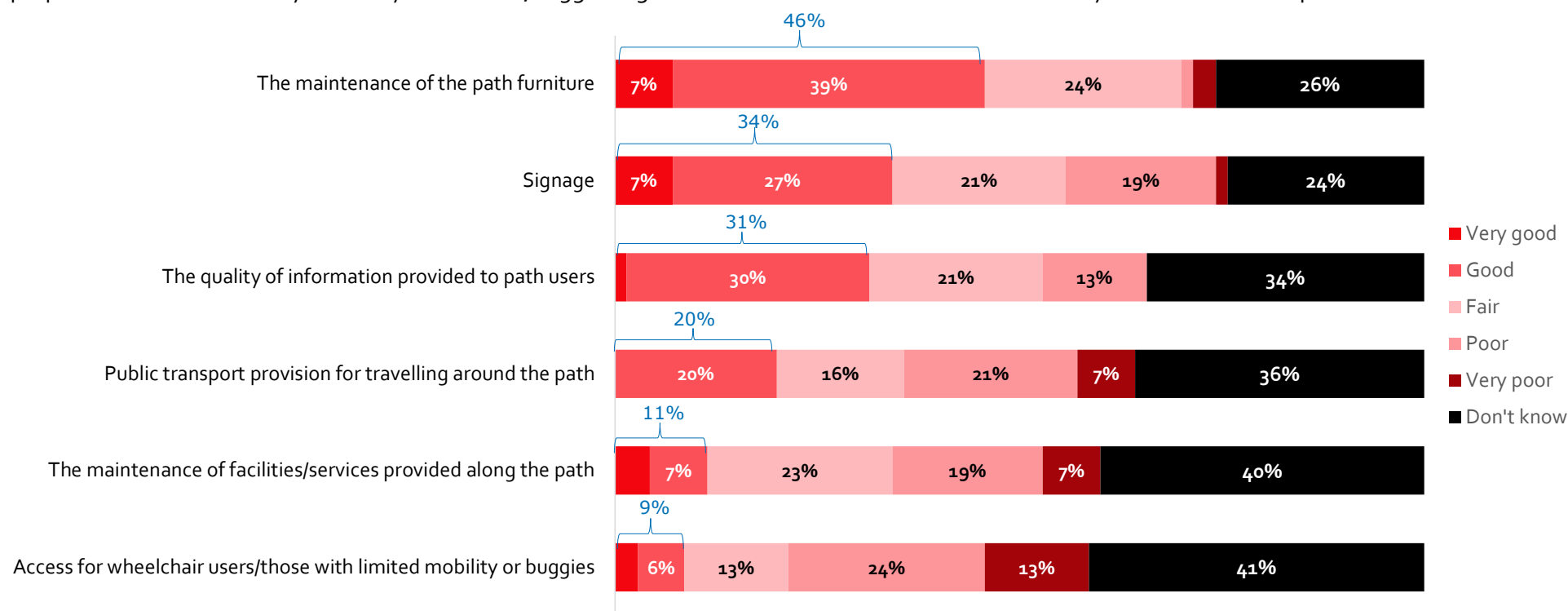
Base: All businesses located in the Ceredigion visitor region (and also assigned to the Wales Coast Path) (70) **Q25a.** Do you consider that in the future there will be any change in the importance of the Wales Coast Path to the success of your business? **Base:** Where path will become more important (20)* **Q25b.** Why is that? *Caution low base size

Wales Coast Path - Ceredigion

Path quality

Perceptions of aspects of the path

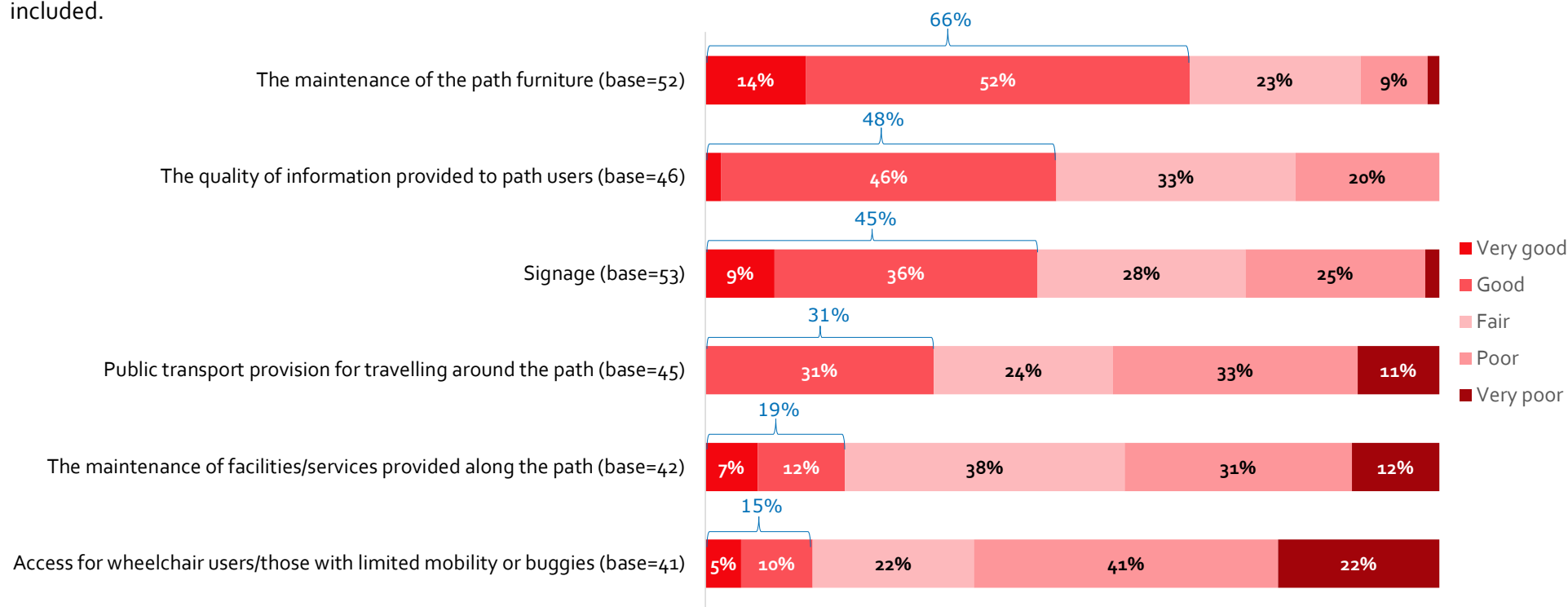
All businesses in Ceredigion were presented with a list of six aspects related to the Wales Coast Path and asked to rate each one. Of all the aspects rated, businesses are most positive about the maintenance of the path furniture (46% good or very good), followed by signage (34% good or very good). However, just 9% rate accessibility of the path positively, with 37% rating it poorly. It is important to note that we do see that a large proportion of businesses say that they don't know, suggesting a lack of awareness as business owners may not have used the path themselves.



Base: All businesses located in the Ceredigion 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

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

When excluding 'don't know' responses, the picture changes slightly. Whilst ratings of the maintenance of path furniture remains most positive (66% good or very good), we see that the next best rated aspect has changed from signage to the quality of information provided, with 48% of those aware rating this as good/very good. Unfortunately, dissatisfaction with accessibility is higher, reaching 63% poor/very poor compared to 37% with don't know responses included.



Base: All businesses located in the Ceredigion 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

Wales Coast Path - Ceredigion

Path promotion

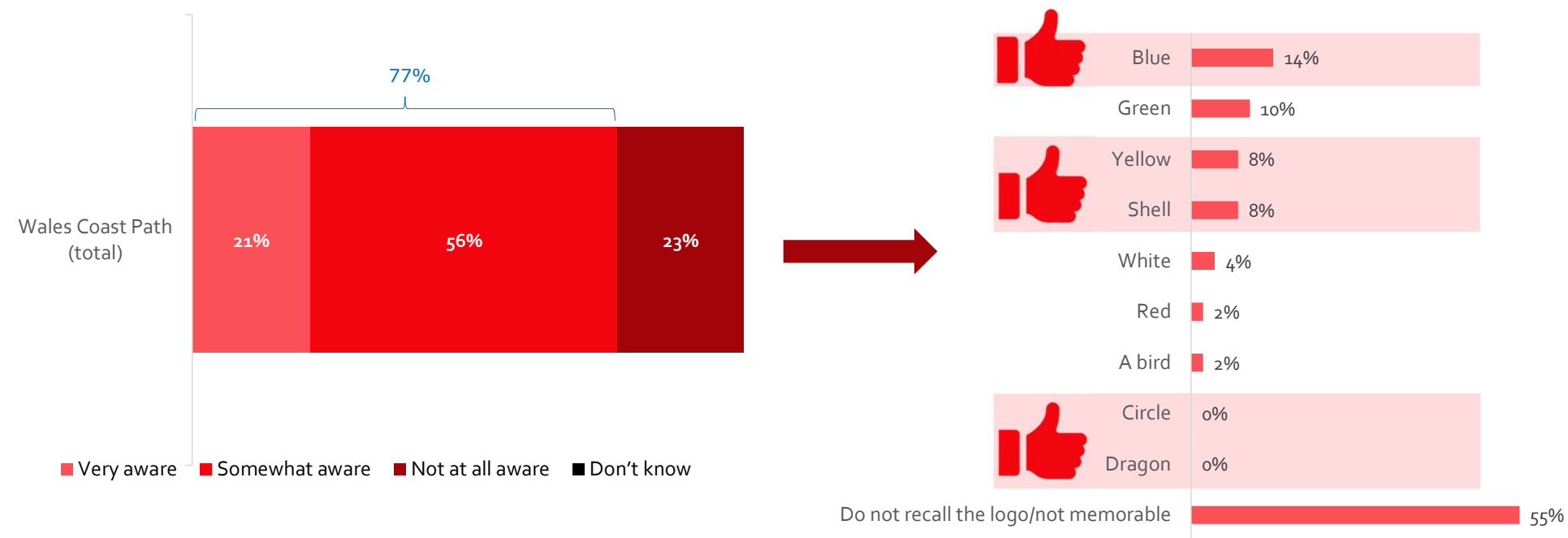


Llwybr Arfordir Cymru
Wales Coast Path



Branding Awareness

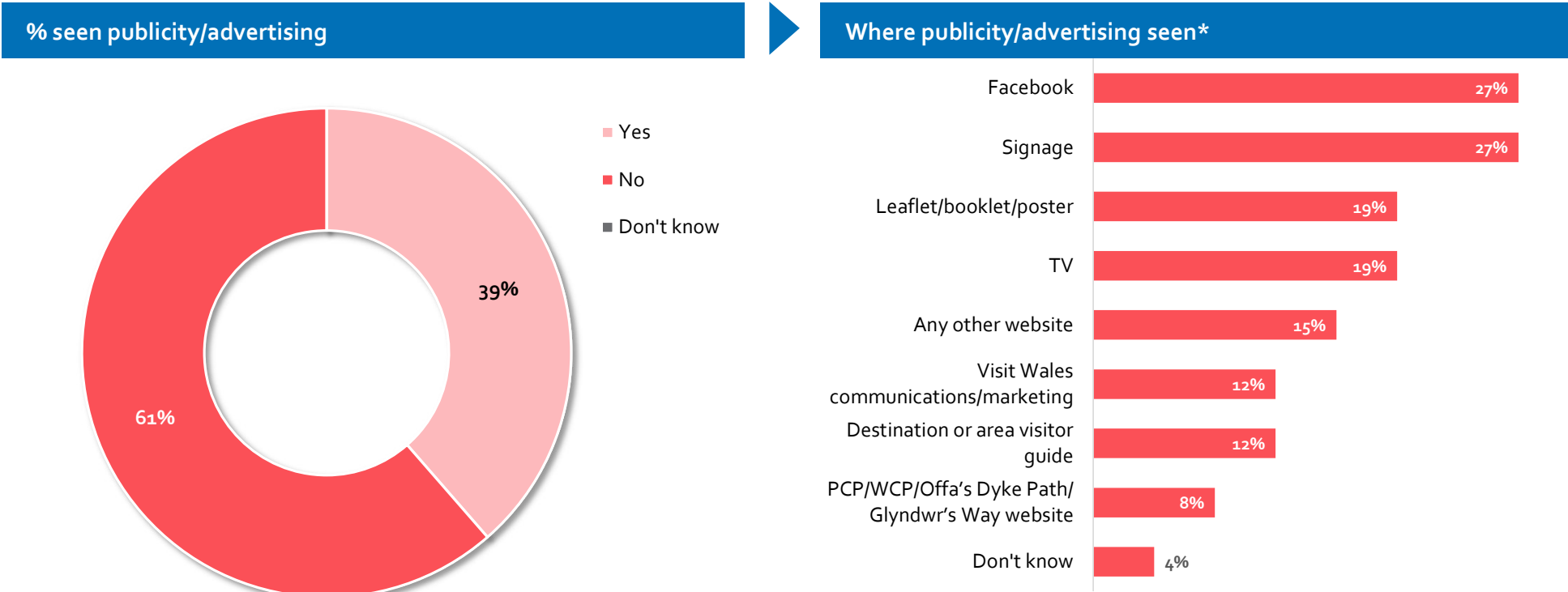
77% of businesses in Ceredigion have at least some awareness of the path's branding, with 21% of businesses stating they are 'very aware'. However, when those respondents were asked to describe the logo, just 14% correctly stated that the logo is blue, 8% say that it is yellow, and 8% correctly stated that the logo represents a shell. Furthermore, 55% state that the logo is not memorable.



Base: All businesses located in the Ceredigion 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 (51) **Q11.** How would you describe the branding (i.e. logo) of Wales Coast Path?

Advertising awareness

39% of businesses in Ceredigion have seen some publicity or advertising related to the path over the last 12 months. Of the 27 businesses that have seen advertising, it is most likely to have been seen via Facebook or signage (both 27%), followed by leaflet or booklet, or on TV (both 19%).



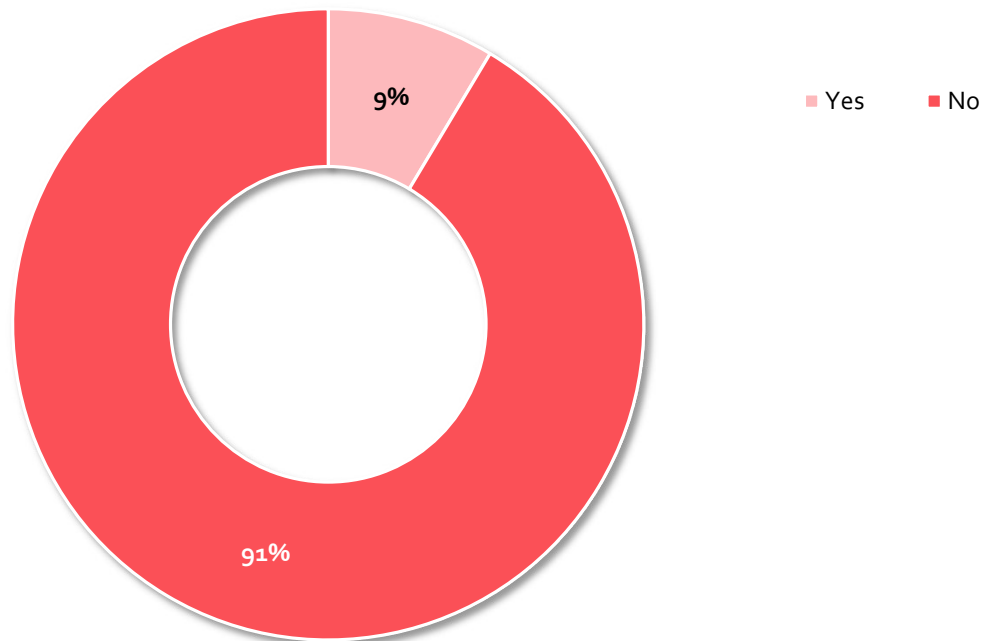
Base: All businesses located in the Ceredigion visitor region (and also assigned to the Wales Coast Path) (70) **Q12.** Over the past year, have you seen or heard any publicity, advertising or information about the Wales Coast Path?
Base: All businesses who have seen or heard publicity, advertising or information (27*) **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

21

Receipt of direct communications

Just 9% of businesses in Ceredigion recall having received direct communications about the Wales Coast Path in the past year. It should be noted, this is not significantly different to the average for all businesses along the Wales Coast Path, nationally (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.

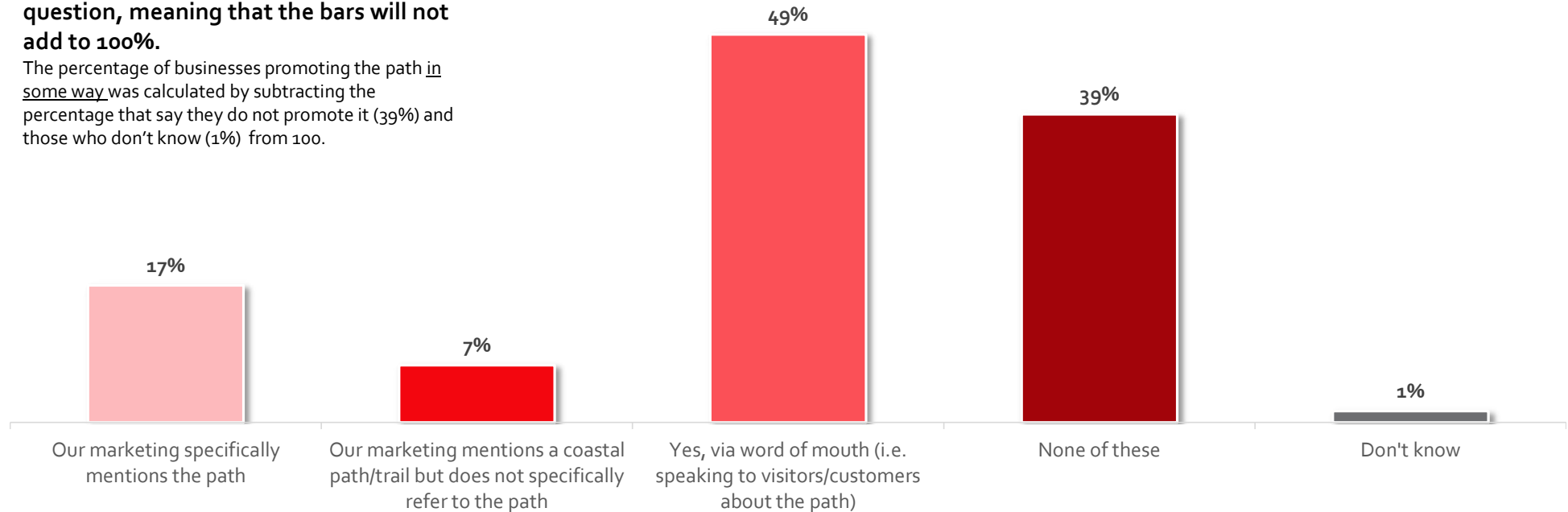
Base: All businesses located in the Ceredigion visitor region (and also assigned to the Wales Coast Path) (70) **Q15.** Over the past year, do you recall receiving any direct communications about the Wales Coast Path?

Path promotion by businesses

59% of businesses in Ceredigion promote the Wales Coast Path in some way, with 17% stating that the path is specifically mentioned in their marketing materials. A further 49% businesses promote the path via word-of-mouth and 7% mention a 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 (39%) and those who don't know (1%) from 100.

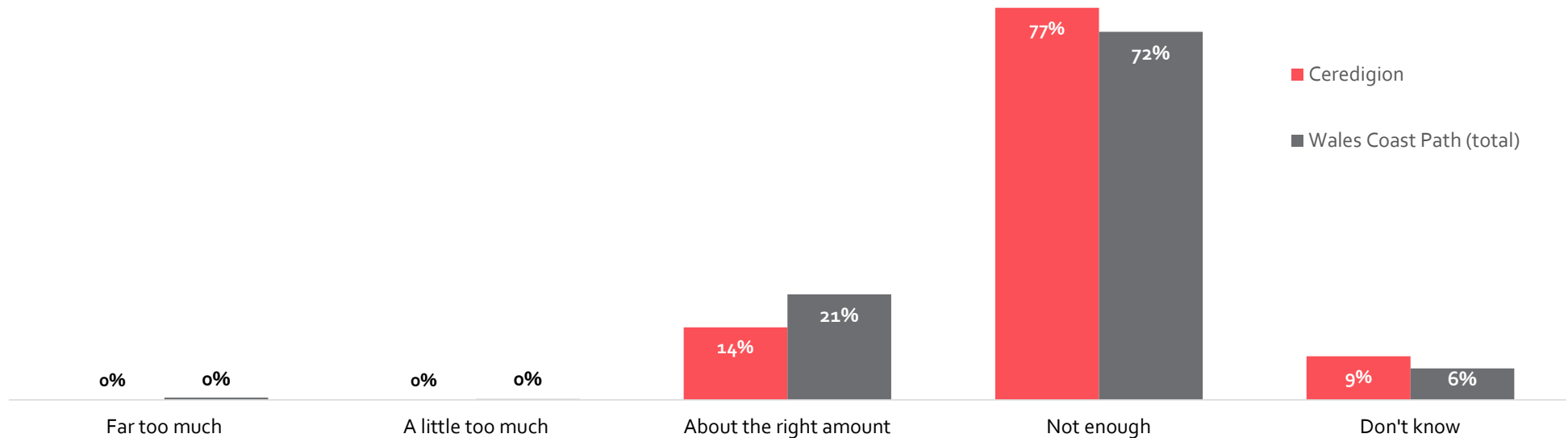


Base: All businesses located in the Ceredigion visitor region (and also assigned to the Wales Coast Path) (70) **Q17.** Do you mention or promote the Wales Coast Path in any of your own marketing materials, for example on your website or social media channels, or when speaking to your customers?

Path promotion

Whilst 14% of businesses in Ceredigion think that the Wales Coast Path is promoted about the right amount, a much higher proportion (77%) do not think it is promoted sufficiently. This is 5% points higher than the average for businesses along the Wales Coast Path, nationally (72%). However, due to the differing base sizes, this is not a significant difference.

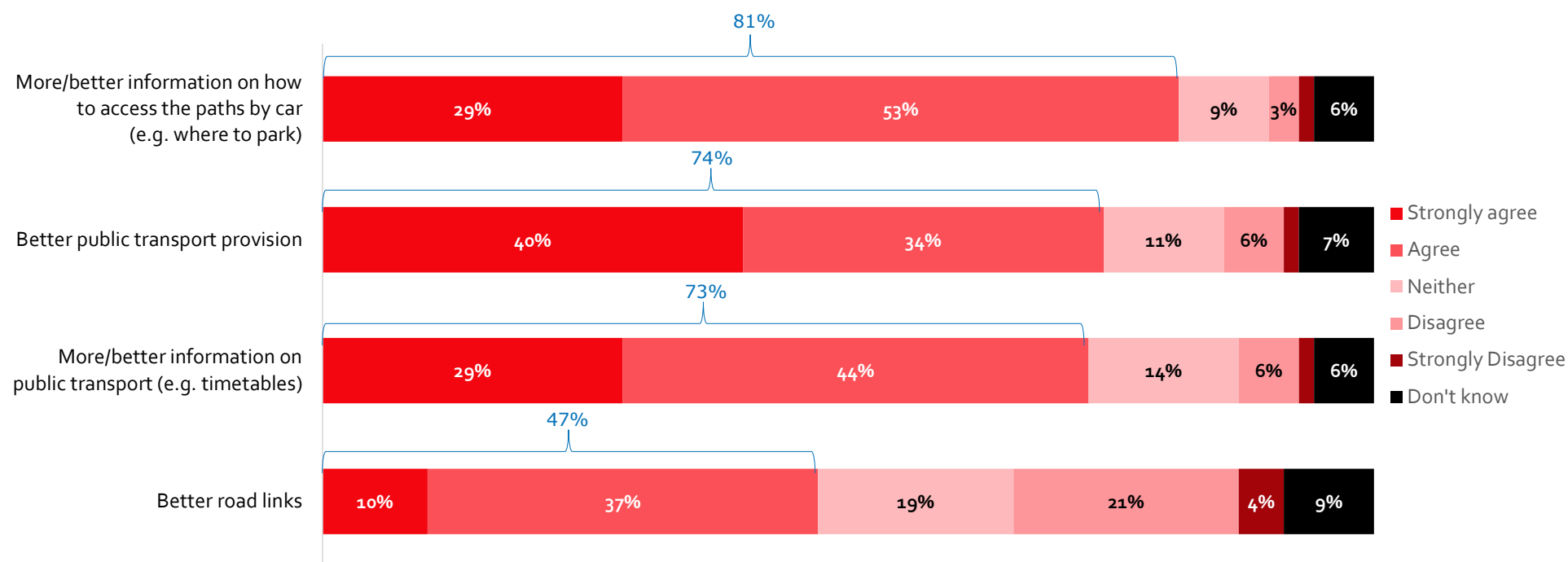
Overall, do you think the path is promoted...?



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

Encouraging visits

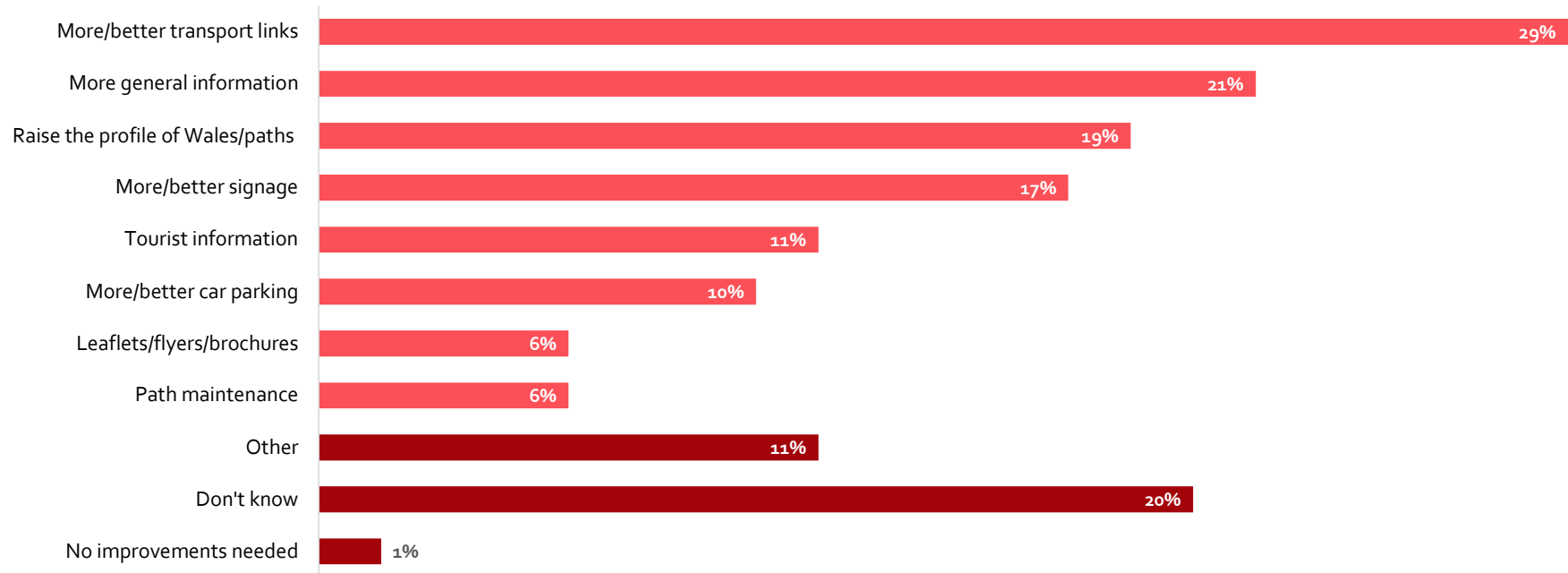
Businesses in Ceredigion were presented with four potential improvements to the path and asked to state to what extent they agree or disagree that they are needed. 81% feel that more/better information on how to access the path by car is needed. This is closely followed by better public transport provision (74%). On a more positive note, only 47% businesses think better road links are needed.



Base: All businesses located in the Ceredigion 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

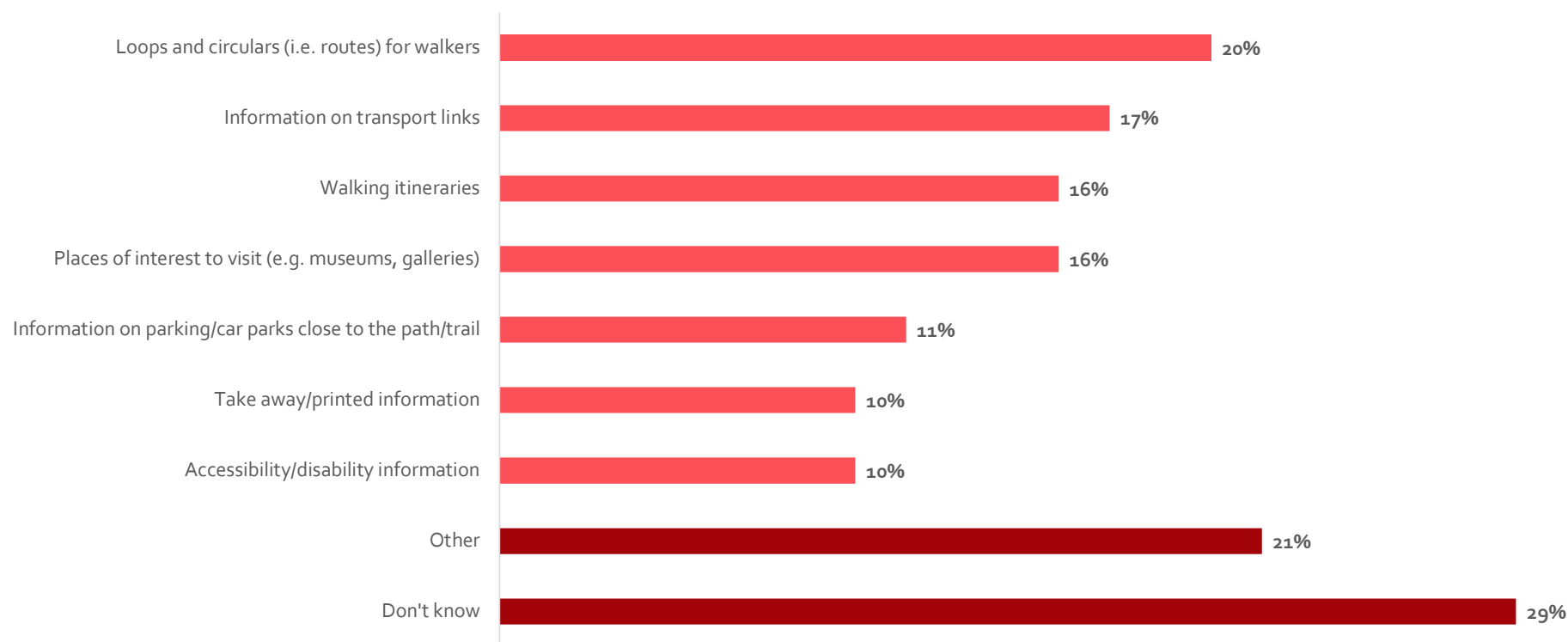
When asked in an open question what improvements are necessary to improve access, businesses' top recommendation for the Wales Coast Path in Ceredigion is to improve transport links, with 29% making this a priority. 21% believe that customers/visitors could benefit from more general information about the area and the path, and 19% believe that in order to help customers access and travel around the path, the profile of Wales and the path needs to be raised. This prioritisation is generally in line with the findings for the Wales Coast Path nationally.



Base: All businesses located in the Ceredigion visitor region (and also assigned to the Wales Coast Path) (70) **Q22.** What improvements (if any), do you think are needed to help more 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 loops and circulars (routes) (20%) and information on transport links (17%). This is also in line with the findings for the Wales Coast Path nationally.



Base: All businesses located in the Ceredigion visitor region (and also assigned to the Wales Coast Path) (70) **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

Wales Coast Path - Ceredigion

Conclusions and recommendations

Conclusions and recommendations

The Wales Coast Path increases customer numbers and business turnover in Ceredigion.

54% of businesses report an increase in customer numbers, and 41% see a positive benefit on turnover due to the path, exceeding the national average for the Wales Coast Path.

Awareness of the path's branding is high, offering a solid base for improved recognition.

77% of businesses are aware of the branding, but there is potential to make the logo and its symbolism (e.g., the shell) more recognisable and memorable.

Enhancing accessibility and transport information could boost visitor satisfaction.

While accessibility and public transport were rated as areas for improvement, businesses see this as a key opportunity to enhance the visitor experience, with 81% supporting more information on car access and 74% advocating for better transport options.

Leverage this economic benefit by collaborating with local businesses to offer joint promotions, such as discounts or loyalty incentives for visitors.

Highlight the path's role in driving footfall and sales to strengthen local tourism and commerce.

Build on the strong branding awareness by creating engaging, visually appealing campaigns that emphasise the logo and its connection to the path.

For instance, launch a social media initiative where visitors share their path experiences using a branded hashtag, paired with incentives like free merchandise.

Develop a simple and user-friendly transport guide featuring car parks, bus stops, and shuttle services along the path.

Partner with local transport providers to offer seasonal promotions or discounted travel for visitors using the path.

Conclusions

Circular routes and detailed itineraries can further enhance visitor experiences. Businesses identified a demand for more information on loops, circular routes, and transport links, with 20% specifically mentioning the need for route maps.

Design a series of walking itineraries tailored to different interests (e.g., family-friendly walks, nature trails, or heritage routes). Include practical details like distances, difficulty levels, and nearby facilities, and share them digitally and amongst local businesses.

Businesses in Ceredigion actively promote the path but can elevate its prominence. 61% of businesses promote the Wales Coast Path, with 24% considering it an important component of their marketing. However, there is scope to increase its prominence in marketing materials.

Provide businesses with high-quality, ready-to-use marketing resources, such as professional photos, videos, and engaging content about the path. Conduct workshops to help businesses incorporate the path into their branding more effectively, highlighting the mutual benefits of stronger promotion.

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

