

# Wales Coast Path & Wales National Trails Business Survey 2024 (Overall report)



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Contractor: DJS Research

Contract Manager: Julie Hollingsworth

Author(s): **[Julie Hollingsworth, Clare Rapkins and Emily Ward]**

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# Executive summary

## Background to the research

In 2013, Natural Resources Wales (NRW) published a research study to evaluate the benefits brought to businesses by the opening of the Wales Coast Path. Prior to this, a research study was also undertaken in 2006, focusing on the three National Trails in Wales.

In November 2023, Natural Resources Wales (NRW) commissioned DJS Research to undertake an updated study. The primary aim of this research was to gather comprehensive information and actionable insight about the businesses that operate close to or on Wales' long-distance routes (namely the Wales Coast Path, including Pembrokeshire Coast Path National Trail, Offa's Dyke Path National Trail, and Glyndŵr's Way National Trail). A map of the routes<sup>1</sup> included in the study is shown below.

Figure 1: Map of the routes included in the research study



<sup>1</sup> From this point onwards, when we mention 'routes', we are referring to all routes covered in the survey namely Wales Coast Path, including Pembrokeshire Coast Path National Trail, Offa's Dyke Path National Trail, and Glyndŵr's Way National Trail.

## Methodology

The following research methods were used to meet the research objectives.

### Quantitative telephone survey

The main methodology for the business survey was CATI interviews (Computer-assisted telephone interviewing), with an option provided for completing the survey online. DJS Research developed a questionnaire (with input from NRW). The questionnaire was signed off by NRW on 19<sup>th</sup> February 2024. A copy of the survey can be found in Appendix 1.

Fieldwork for the survey took place between the 21<sup>st</sup> of March and the 4<sup>th</sup> of July 2024. A total of 1,013 responses were obtained (1,002 via telephone and 11 online responses).

### Qualitative in-depth interviews

To add extra value to the research, seven telephone in-depth interviews with businesses were conducted. The aim of these interviews was to obtain a more detailed understanding of the specific benefits that businesses have experienced due to their proximity to the Wales Coast Path or National Trails. A copy of the topic guide used during the interviews can be found in Appendix 2.

## Sample design

It was agreed with NRW that the 2024 survey would focus predominantly on businesses based in Wales but also those in England who believe they benefit from their proximity to the routes.

We also agreed with NRW that we would primarily speak to businesses within a two-mile corridor of the routes but that this corridor may be wider for more rural areas or if businesses indicated that they gain any business benefits from the customers that the routes attract.

Because the availability of business data has become more restricted in recent years, and to ensure the sampling frame was as comprehensive as possible, DJS Research worked with CACI (a specialist GIS and Data consultancy) to produce a list of postcodes that fall within a 2-mile corridor of the Wales Coast Path and up to 5 miles of the Offa's Dyke Path and Glyndŵr's Way National Trails. These postcode lists were shared with our commercial database provider, Datascope and a sampling frame was generated of businesses that fall within these specified postcodes. In addition to sourcing data through Datascope, DJS Research conducted its own desk research to find additional contacts. A survey registration page was also created and promoted by NRW and partners on social media and circulated by email.

Further details on the project background, methodology and sample design can be found in sections 1-3 of this report.

# Key findings

## Business profile

- A total of 1,013 businesses took part in the survey. Businesses were recruited based on their proximity (in walking distance or a short drive) from the surveyed routes (Wales Coast Path, Pembrokeshire Coast Path National Trail, Offa's Dyke Path National Trail or Glyndŵr's Way National Trail). Businesses were also in scope if they believed they benefitted from the existence of at least one of the surveyed routes in some way. Where a business was close to or benefitted from more than one route, they were assigned to one route based on the one that generated the highest proportion of its income.
- A wide range of sectors are represented in the survey. The majority are in the private sector (85%). 93% are micro/small businesses. 46% of businesses surveyed have a turnover of up to £200,000 per annum, while 8% have a turnover of more than £1 million. 78% have a single premises based in Wales.
- 72% of businesses surveyed are well established and have been operating for at least 10 years, although a small proportion of those interviewed (6%) have opened within the last 2 years.
- When looking at the seasonality of businesses, the vast majority (85%) are open all year. 40% of businesses experience peaks in demand during the Spring and Summer months. 31% state that their business is not seasonal at all.

## Importance of the routes

- Overall, around 50% of the 1,013 businesses surveyed believe they benefit in some way from at least one of the routes. Benefits mostly relate to increased volumes of customers, with some businesses stating the routes generate 'major income' for them, or that their business simply would not exist without the routes. On average 43% of businesses surveyed say the routes help increase the number of customers. Of these, the vast majority (99%) report a significant increase in customers due to the routes. For 33% of businesses, the routes benefit their turnover, and for 11% of businesses, they have also helped secure employment.
- Whilst we are unable to draw direct comparisons with the 2013 survey (please refer to the 'Benchmarking' section on page 18 for more details), there are indications to suggest that some of these benefits have continued to increase in the last decade. This is particularly the case for customer numbers. Some businesses have also successfully introduced new products or services to help expand their offering to customers.
- When looking to the future, 21% of businesses feel that their assigned route will become more important to the success of their business. This is particularly the case amongst businesses assigned the Wales Coast Path (including Pembrokeshire Coast Path) or Pembrokeshire Coast Path only.
- Despite these positive results, the findings highlight some areas where improvements could be made to help encourage more customers. These include



improved accessibility for those with wheelchairs/buggies, better public transport provision and more information about how to travel around the routes (either by car or public transport).

## **Brand awareness and promotion**

- 68% of all businesses are aware of their assigned route's branding or how it's promoted. This increases to 71% of businesses assigned to the Wales Coast Path (including Pembrokeshire Coast Path) and 82% for Pembrokeshire Coast Path alone.
- Further work to promote the routes may be needed. For example, 70% of businesses do not think the routes are promoted enough.
- Only 33% of businesses have seen publicity or advertising relating to their assigned route in the last 12 months. In addition, only 9% remember receiving direct communications during this same time period. Whilst Natural Resources Wales and key stakeholders can actively promote the routes, there is a role that businesses can play too. Although 48% of businesses promote their assigned route in their marketing materials in some way, only 19% specifically mention it by name. Moreover, only 24% consider it to be an important component of their marketing.
- Many of the business representatives that took part in the research are also local residents who appear to be quite passionate about the routes surveyed, Wales generally and what the area has to offer to visitors and residents. It seems there is an appetite for some businesses to become route ambassadors. Therefore, NRW or stakeholders may wish to facilitate an ambassadors programme by giving selected business representatives the knowledge, resources and tools to promote the routes for the benefit of their own businesses as well as others.

## **Business support**

- All businesses were asked to provide feedback on the financial and other support (e.g. help with marketing or training) available to them. Only around a fifth rated each aspect as 'good' (excluding those who said they 'Don't know').
- Whilst awareness of available support is limited, the results indicate that a need exists. 55% of businesses would be interested if a dedicated Wales Coast Path and National Trails business portal was introduced. When asked to provide details of what they think the portal should include, the most frequently mentioned topics relate to news, events and shareable content for their customers.

# Recommendations

Several recommendations have been identified that Natural Resources Wales may wish to consider:

## Importance of the routes

The survey results and case studies indicate that some businesses would not survive without the existence of the routes, as they rely heavily on the customers that the routes attract. To help increase future customer numbers, it seems some improvements to route maintenance/accessibility (particularly for wheelchair or buggy users), signage, public transport and the quality of information provided (particularly related to travelling around the routes) could be made.

## Marketing/promotion of the routes

- Only a relatively small proportion of businesses (33%) have seen publicity or advertising relating to their assigned route. In addition, 70% do not think their assigned route is promoted enough. There are also indications to suggest that awareness of publicity and advertising has decreased since 2013 (although the 2013 survey only included businesses assigned to the Wales Coast Path and the Pembrokeshire Coast Path). This suggests that Natural Resources Wales and key stakeholders may wish to increase the volume of advertisement but also explore a more targeted approach to communications. This will help to ensure it is more relevant to businesses and their customers. They may also wish to review the communication preferences of businesses to ensure they are receiving information on the routes in their preferred format, particularly as 72% of businesses would prefer to receive communications from NRW and its stakeholders via email.
- Natural Resources Wales and its key stakeholders could work with businesses (if they don't already) to encourage more businesses to refer to their assigned route in their marketing materials. For example, Natural Resources Wales and key stakeholders could share case study examples or 'Good News Stories' with businesses to help demonstrate the positive impacts.
- The case studies (see Appendix 3) also highlight a potential need to organise more events/promotions to encourage visitors to the routes in off-peak times of the year. This may help increase sales/customers at these times of year, given that some businesses have indicated that they struggle to maintain a steady income throughout the year.

## Business support

- The survey findings highlighted limited awareness of the financial and other support available to businesses. It may, therefore, be beneficial for Natural Resources Wales and stakeholders to communicate details of the current support available and provide clearer guidance on how to apply (if necessary).

- Finally, the survey results indicate potential interest in the introduction of a dedicated Wales Coast Path and National Trails business portal. If Natural Resources Wales decides to introduce this in the future, it would be beneficial to consult with businesses during the design process to ensure it meets their needs.

# Section 1: Background to the research

In 2013, Natural Resources Wales (NRW) published a research study to evaluate the benefits brought to businesses by the opening of the Wales Coast Path. Prior to this, a research study was also undertaken in 2006, focusing on the three National Trails in Wales.

In November 2023, Natural Resources Wales (NRW) commissioned DJS Research to undertake an updated study. The primary aim of this research was to gather comprehensive information and actionable insight about the businesses that operate close to or on Wales' long-distance routes<sup>2</sup>. A map of the routes included in the study is shown below.

Figure 2: Map of the routes included in the research study



<sup>2</sup> From this point onwards, when we mention 'routes', we are referring to all routes covered in the survey namely Wales Coast Path, including Pembrokeshire Coast Path National Trail, Offa's Dyke Path National Trail, and Glyndŵr's Way National Trail.

**More specifically, the key objectives of this research study were to:**

- Identify the types of businesses operating on or near the Wales Coast Path and National Trails.
- Understand the services provided by businesses in proximity to the routes.
- Assess the benefits that the routes bring to businesses, encompassing both direct and indirect income generated throughout different seasons.
- Evaluate the level of collaboration amongst businesses located along the routes.
- Gather opinions on issues such as public transport availability, visibility, accessibility, signage, marketing, support, and any challenges or barriers related to the routes.
- Explore interest and support for establishing a dedicated Wales Coast Path/ National Trails business portal.
- Compare results with previous surveys conducted on the same subject matter where possible or relevant.

## Section 2: Methodology

The following research methods were used to meet the research objectives listed above.

### Quantitative telephone survey:

The main methodology for the business survey was CATI interviews (Computer-assisted telephone interviewing), with an option provided to complete the survey online.

Firstly, DJS Research developed a questionnaire (with input from NRW) which captured information on:

- Business profile (such as business sector/activities, business size, etc)
- Importance of each route for businesses
- Awareness of marketing activity related to the routes
- Feedback on various aspects of the routes (e.g. public transport provision, signage, etc.)
- Awareness and usage of business toolkits
- Perceived benefits of the routes
- Collaboration between businesses
- Views on having a dedicated WCP/National Trails business portal
- Further opportunities for support

The questionnaire was signed off by NRW on 19<sup>th</sup> February 2024. A copy of the survey can be found in Appendix 1.

Before the main telephone interviews began, DJS Research conducted six cognitive test interviews between 26<sup>th</sup> February and 11<sup>th</sup> March 2024. All interviews were conducted by telephone by a senior member of the research team. Participants were recruited using contacts sourced via desk research.

Whilst taking part in the cognitive interviews, participants were invited to comment on the following:

- Survey length
- Flow of the questions
- Use of language
- Ease of understanding
- Whether they felt there were any gaps in the questionnaire

The businesses that took part in this process came from retail, accommodation and hospitality sectors and were located either on the Wales Coast Path, the Pembrokeshire Coast Path, Offa's Dyke Path, or Glyndŵr's Way.

After the cognitive phase was completed, DJS Research reviewed the feedback and recommended some minor changes to the questionnaire (which were agreed upon by Natural Resources Wales). At this point, DJS Research also created a Welsh version of the survey. An online survey was also created as an alternative method of completion

for businesses. The online link was promoted and circulated by Natural Resources Wales and key stakeholders.

Fieldwork for the survey took place between the 21<sup>st</sup> of March and the 4<sup>th</sup> of July 2024. A total of 1,013 responses were obtained (1,002 via telephone and 11 online responses).

The final data set was analysed using our analytical software package, Walr. Our Data Team used the software to create a comprehensive set of data tables in Microsoft Excel format. The data tables included results for all questions at a total level and a comprehensive range of cross breaks (such as business size, sector, assigned routes and other key variables). The tables also included significance testing and a table of contents.

## Qualitative in-depth interviews:

To add extra value to the research, DJS Research also conducted seven in-depth interviews with businesses (who gave their consent in the survey to be re-contacted). All these interviews were conducted by telephone.

The aim of these interviews was to complement the quantitative survey results and obtain a more detailed understanding of the specific benefits that businesses have experienced due to their proximity to the Wales Coast Path or National Trails and the improvements or additional support they think are needed to help them maximise the benefits further.

Summaries of the seven interviews have been included in Appendix 3 of this report as case studies. Where relevant, quotes from the interviews have also been used in the main body of the report to help support and illustrate key points from the survey. A copy of the topic guide used during the interviews can be found in Appendix 2.

## Section 3: Sample design

**The construction of the sampling frame was a critical part of this research.**

The tender specification and the subsequent inception meetings highlighted a need to try and replicate the approach undertaken previously, where possible. However, it was also recognised that the approaches taken in each of the previous two research studies were slightly different and that in the 10+ years since the last research study was undertaken, the landscape of businesses in the area has changed. The specific objectives of this 2024 survey also differed from previous surveys.

Based on this understanding, the 2024 survey predominantly involved businesses based in Wales but also those in England who believe they benefit from their proximity to the routes. We also agreed with NRW that we would primarily speak to businesses within a two-mile corridor of the Wales Coast Path but that this corridor may be wider for more rural areas (such as Offa's Dyke Path and Glyndŵr's Way National Trails). However, it was also agreed that we would not exclude any businesses that are located further than 2 miles away from a route if they considered themselves to be close, or if they indicated that they gain any business benefits from the customers that the routes attract.

**The 2024 survey focused on the following sectors:**

- Accommodation
- Hospitality/catering
- Retail
- Visitor attractions/places to visit/leisure facilities
- Transport
- Tourism/leisure related services or activities
- Manufacturers, producers or suppliers of products associated with the routes
- Building/construction/repair or maintenance

Since the availability of business data has become more restricted in recent years, and to ensure the sampling frame was as comprehensive as possible, DJS Research took the following steps to help develop a sampling frame for this project:

- **Step 1:** Commissioned CACI (a specialist GIS and Data consultancy) to provide a list of postcodes which fall within a 2-mile corridor of the Wales Coast Path and up to 5 miles of the Offa's Dyke Path and Glyndŵr's Way National Trails.
- **Step 2:** The postcode lists for the Wales Coast Path, Offa's Dyke Path and Glyndŵr's Way were shared with our commercial database provider, Datascope. This enabled them to provide us with the contact details of 4,500 businesses in relevant sectors within the specified postcodes.

In addition to sourcing data through Datascope, DJS Research also conducted desk research to find additional contacts. Through this process, during the pilot stage, we identified an additional 343 potential businesses. This was achieved via general web searches, as well as using the official websites for each route which detail accommodation options for walkers.



This list of contacts sourced via desk research was sent to Datascope, who de-duplicated their data file accordingly to ensure that all records supplied were unique.

In addition, a survey registration page was created and promoted by NRW and partners on social media and circulated by email. This allowed businesses to express their interest in taking part in the research and resulted in a total of 95 businesses registering, who were then invited to take part in the survey.

## Section 4: 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 that 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 businesses that responded to the survey overall (1,013).

### Definition of 'Assigned' path/trails

After answering a series of screening questions to determine the proximity (S02a, S02b) and importance of routes to individual businesses (S03, Q01 and Q02), businesses were assigned a route and asked to respond to the remaining survey questions based on their assigned route. In instances where businesses were located close to or benefitted from more than one route, they were assigned to the one which either a) generated the highest proportion of their sales/turnover or b) they were most reliant on for their business.

### Definition of 'path', 'trails' and 'routes'

Throughout the report, there are references to both 'path' and 'trails'. It should be noted that when referring to a path, we are specifically talking about the Wales Coast Path (including the Pembrokeshire Coast Path). When we are referring to 'trails', we are referring to Pembrokeshire Coast Path National Trail, Offa's Dyke Path National Trail or Glyndŵr's Way National Trail. Although collectively, the 'paths' and 'trails' are referred to in the report as 'routes'.

### Comparisons between the path and trails

Throughout the report, there are several charts which compare findings for the overall total - 'All surveyed routes' - and between individual routes (paths and trails). Caution should be taken when interpreting these comparisons for the following reasons:

- 1) Two-thirds of the businesses surveyed (66%) have been assigned to the Wales Coast Path (including Pembrokeshire Coast Path), therefore, the total results ('all surveyed routes') will be more heavily skewed towards this particular route.
- 2) Pembrokeshire Coast Path is classified as a National Trail but also forms part of the Wales Coast Path. For this reason, businesses that have been assigned to Pembrokeshire Coast Path are included in both the individual path (i.e.,

Pembrokeshire Coast Path) and the Wales Coast Path results. Throughout the report, when referring to the Wales Coast Path, we are referencing the Wales Coast Path including the Pembrokeshire Coast Path.

## Benchmarking

Throughout this report, we have compared findings (where relevant) with previous studies from 2013. However, any comparisons presented in this report should be treated as indicative due to the reasons outlined below.

The 2013 study assessed the economic impact of the Wales Coast Path, focusing on metrics such as job creation and evaluating the route's role in promoting Welsh coastal tourism. The 2024 survey took a broader approach, engaging with a wider range of businesses, including those in hospitality, retail, visitor attractions, transport, manufacturing, and construction, to explore not only economic impacts but also topics such as businesses' awareness of the routes, perceived benefits, feedback on services, and collaboration opportunities. Given this broader scope, our findings reflect a wider variety of business experiences along the routes, which limits direct comparisons with earlier studies.

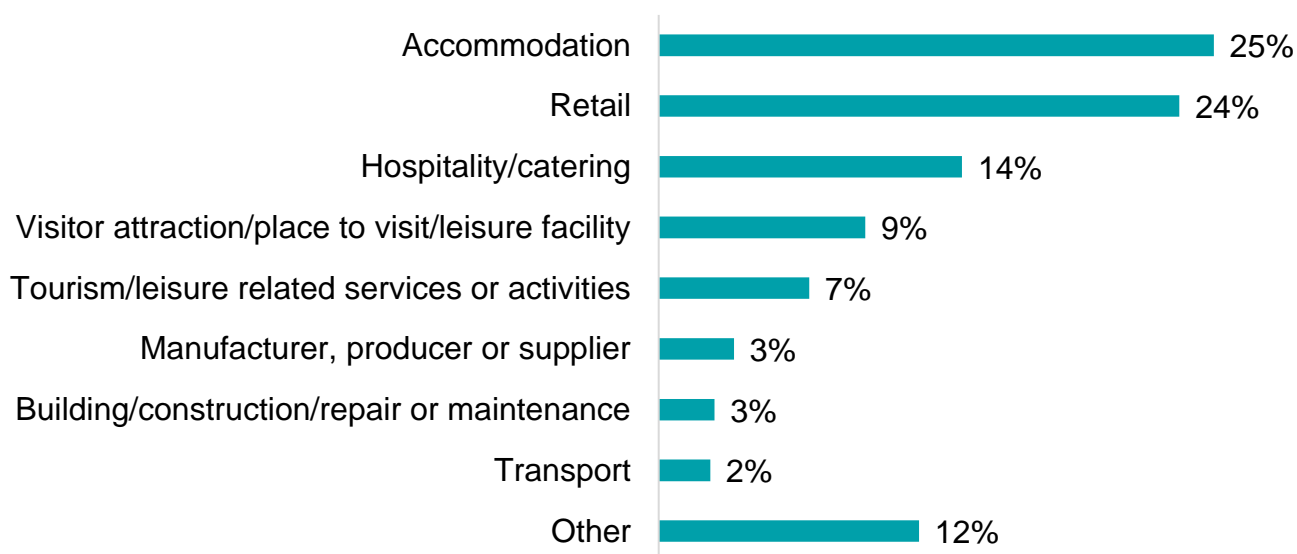
Additionally, since the previous surveys were conducted over a decade ago, the business landscape and customer behaviours within the tourism sector have likely evolved. Whilst we have drawn comparisons where possible, it is worth noting that changes in market dynamics, consumer behaviour and economic conditions over time mean that these past results may not fully reflect the current state of the industry.

## Section 5: Profile of all businesses surveyed

This section of the report details the profile of the 1,013 businesses that took part in the research.

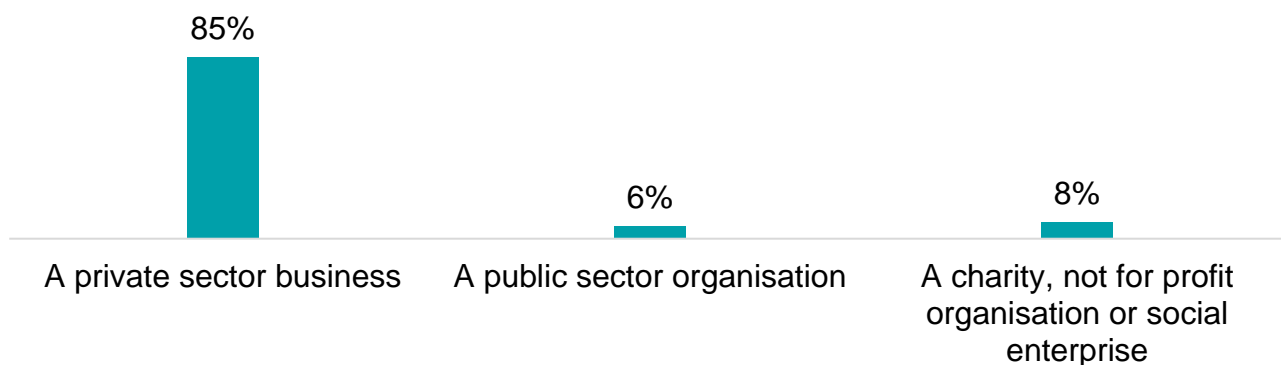
Figures 3-5 below indicate that a wide range of sectors are represented in the survey. 49% are either in the accommodation or retail sectors. The majority are in the private sector (85%) and have fewer than 50 employees (93%).

Figure 3: Business sector



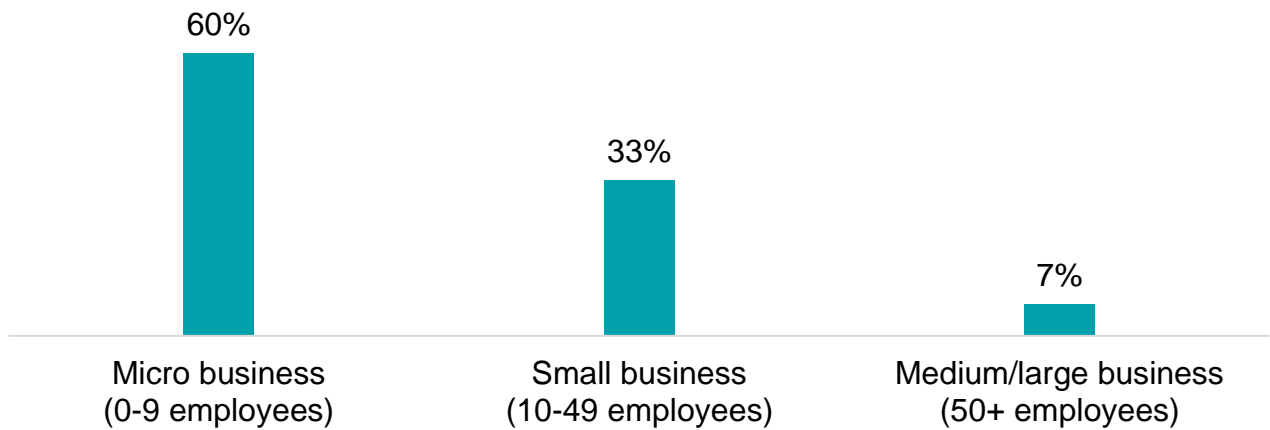
Base: All businesses (1013) Q05B. Which of the following best summarises your main business/organisation's activities?

Figure 4: Business type



Base: All businesses (1013) C01. Which one of the following best describes your business or organisation?

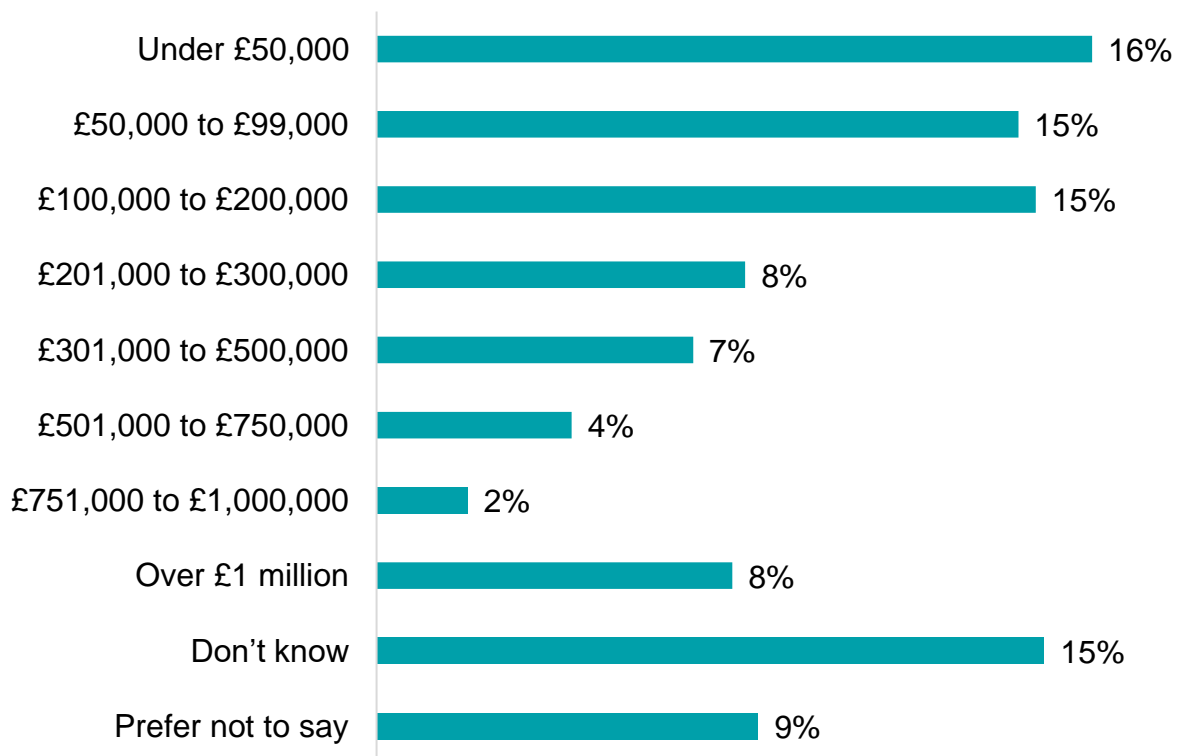
Figure 5: Business size



*Base: All businesses (1013) Q07A/B. Including yourself, how many permanent full and part-time staff are employed by your business/organisation?*

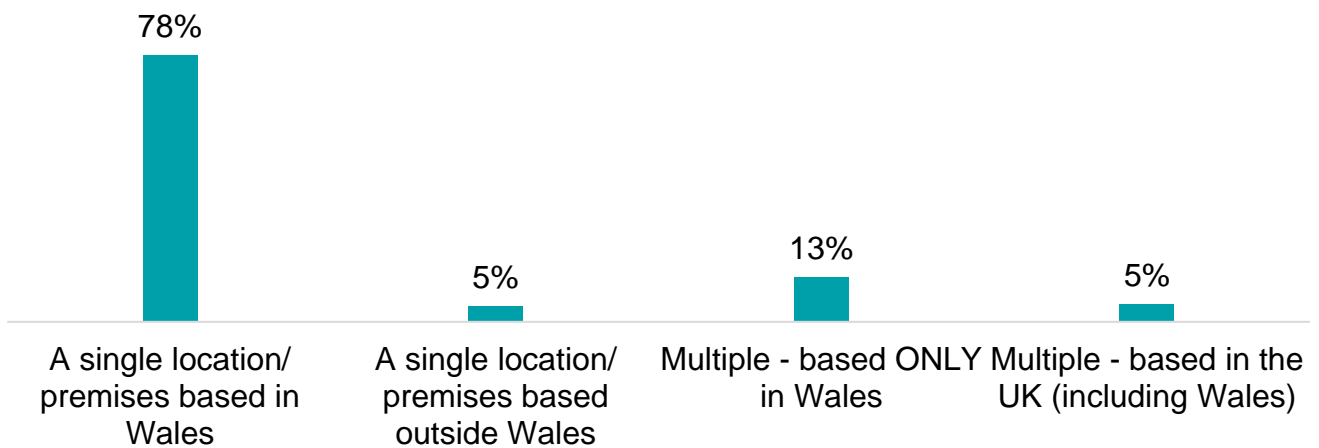
In terms of turnover, 46% of businesses surveyed have a turnover of up to £200,000 per annum, while just 8% have a turnover of over £1 million. 78% of businesses have a single premises based in Wales.

Figure 6: Business turnover



*Base: All businesses (1013) C02. What was the approximate turnover of your business (or sales value) in your last financial year?*

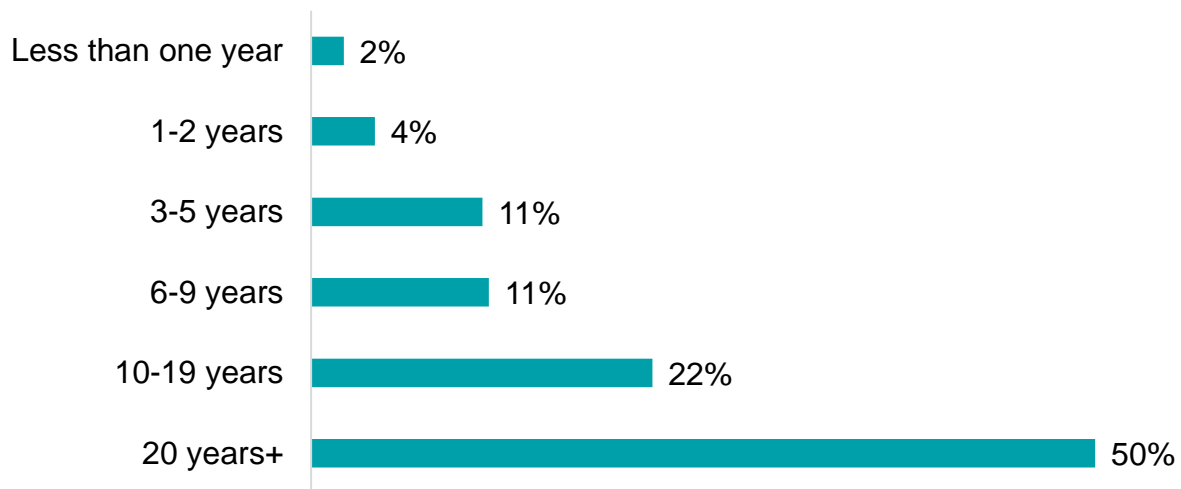
Figure 7: Number of business premises



Base: All businesses (1013) Q06. Does your business/organisation operate from a single location or premises, or multiple locations or premises?

Figure 8 indicates that 72% of businesses surveyed are well established and have been operating for at least 10 years, although a small proportion of those interviewed (6%) have opened within the last 2 years.

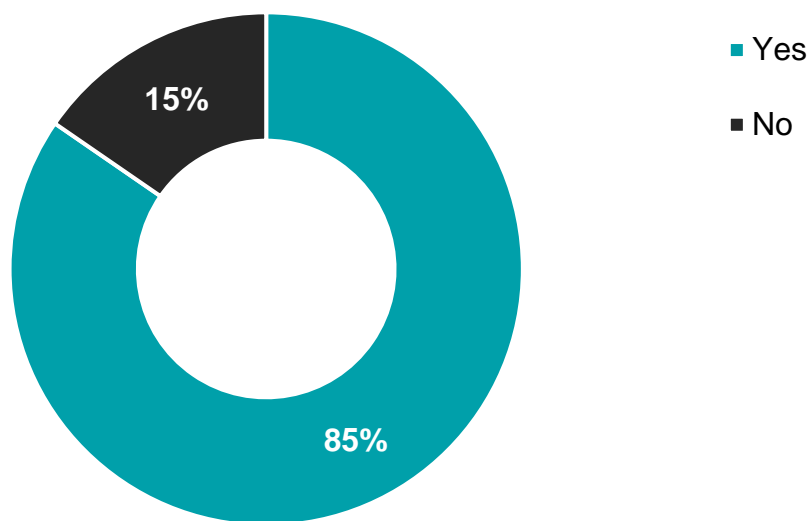
Figure 8: Length of business operation



Base: All businesses (1013) C04. Approximately how long has your business/organisation been operating from this location?

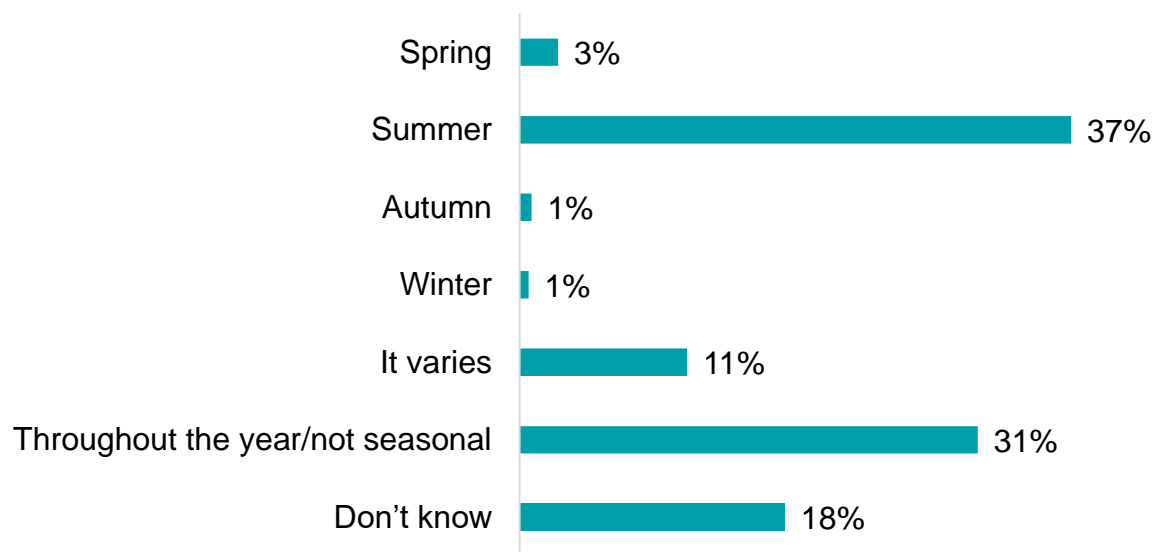
When looking at the seasonality of businesses, the vast majority (85%) are open all year. Figure 10 shows that 40% of businesses experience peaks in demand during the Spring and Summer months. Although 31% state that their business is not seasonal at all.

Figure 9: Whether business is open all year



Base: All businesses (1013) Q09a. And is your business/organisation open all year?

Figure 10: Seasons/times of the year where demand peaks



Base: All businesses (1013) 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?

## Section 6: Overall survey findings

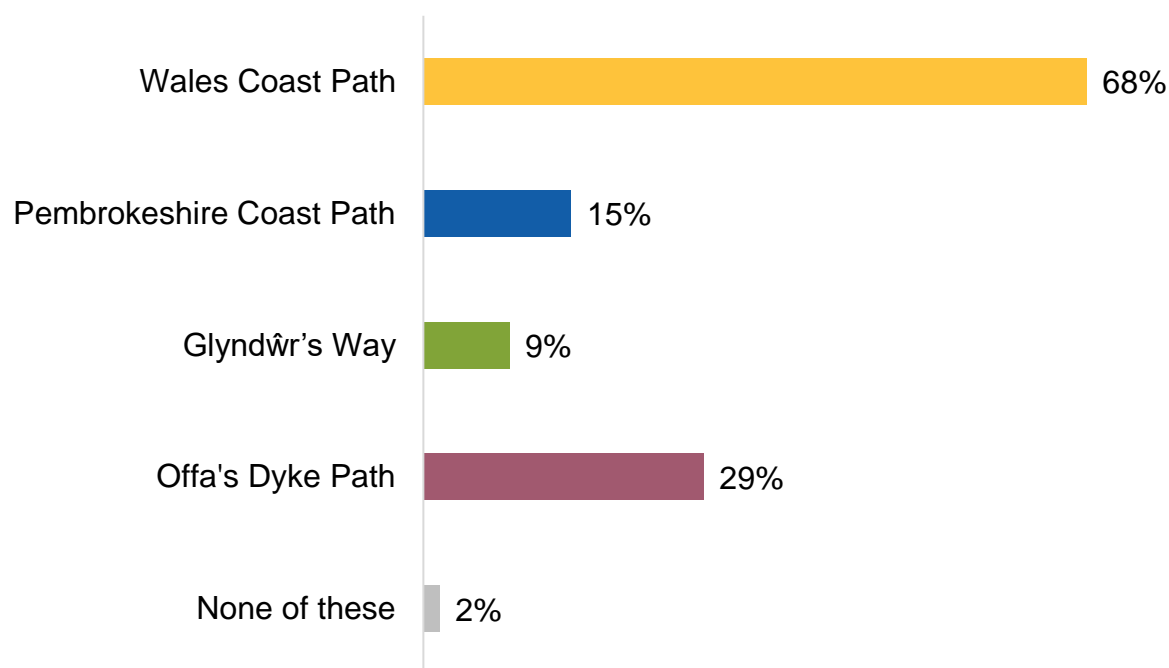
The results presented throughout this report are based on the overall sample of 1,013 businesses that participated in the research. Individual reports for each route and visitor region are provided separately.

Please note that all figures presented in this report for the Wales Coast Path include Pembrokeshire Coast Path. Please see the full explanation in Section 4: 'A guide to this report' for more information.

### Proximity to the routes

68% of businesses surveyed state they are located on or close to the Wales Coast Path, and within this, 15% are located on or close to Pembrokeshire Coast Path. 29% consider themselves to be located on or close to Offa's Dyke Path, while 9% say they are close to Glyndŵr's Way.

Figure 11: Proximity to routes



*Base: All businesses (1013) S02a. Which, if any, of the following paths or trails is your business or organisation located on or close to? Multi-choice question so percentages will add up to more than 100%.*



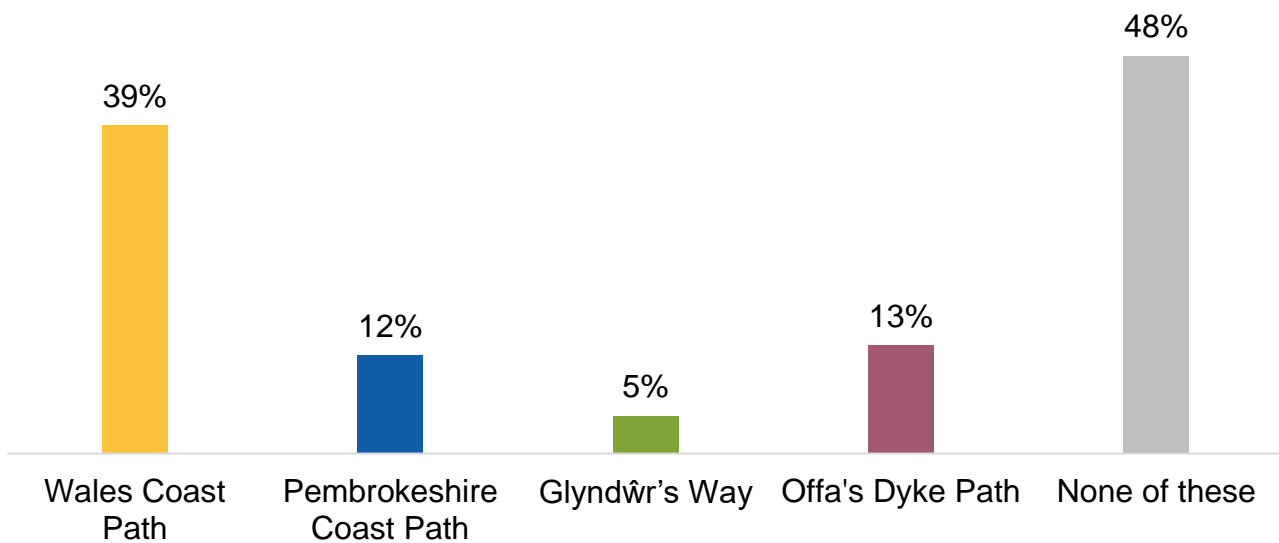
## Benefits derived from the routes

All businesses were asked if they manufacture, sell or supply any products or services to people using any of the walking routes or gain some form of benefit from them.

As Figure 12 shows, 52% of all businesses surveyed claim to gain at least some benefit from the routes.

39% of all businesses surveyed gain at least some benefit from the Wales Coast Path, whilst 13% derive benefits from Offa's Dyke Path and 5% from Glyndŵr's Way.

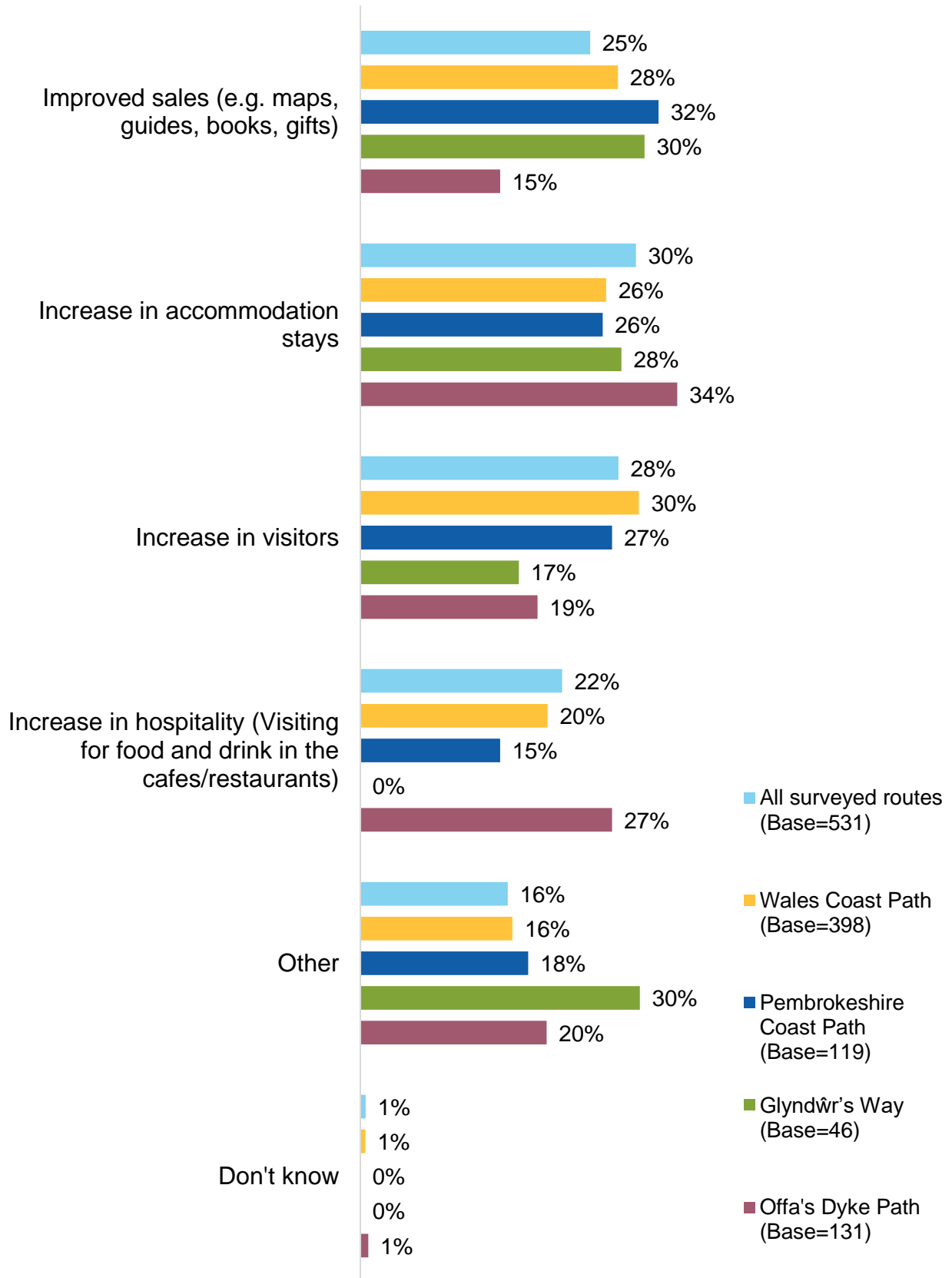
Figure 12: Whether businesses derive any benefits from each route



*Base: All businesses (1013) S03. Does your business or organisation 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 either path/trail? Multi-choice question so percentages will add up to more than 100%.*

All businesses that benefit from each route in some way were asked to describe this benefit in their own words. All their responses have been coded into themes and presented in Figure 13 below, with most comments relating to an increase in sales/footfall as a result of the surveyed routes.

Figure 13: Top five benefits obtained from each route



Bases: All businesses who consider themselves to benefit from the paths (46-531) Q01.  
 How does your business/organisation benefit from the <INSERT NAME OF PATH>?

Below are a few examples of typical comments from businesses to help demonstrate the benefit on sales and visitor numbers due to their proximity to the surveyed routes:

**Improved sales (maps, guides, books etc.):**

*“We sell maps and guidebooks, national park products, postcards, posters and the national park magazine.”*

*“Supply printing material to people promoting the paths.”*

**Improved visitor numbers:**

*“We are right on the Anglesey path and there is a high footfall. There are people around most days and in most weathers even in winter. It is seasonal but the business season is getting a bit longer.”*

*“It draws people into the area.”*

Other businesses highlighted that their business would not survive without the existence of the routes, as they rely heavily on tourism (particularly during the spring and summer months). Typical comments from businesses included:

*“We get the tourism in the summer and also receive people from walking holidays in the spring and autumn.”*

*“Increased usage of the coastal path (leads) to increased retail and tourism. (They) all lead to beneficial effect on our business.”*

*“Many people choose us for our proximity. Ramblers and people who appreciate views.”*

*“All of those walkers are our major income; we specialise in Welsh walks.”*

*“We get a lot of walkers come into the booking office wanting to go on boat trips. ...Quite often when the weather is bad, and we can't run boat trips, we recommend the walkers to the coastal path in the hope of sighting wildlife that they would see on the trip.”*

*“I paint landscapes of the area and wouldn't have a business otherwise. It attracts people to Pembrokeshire and my gallery could barely exist without it.”*

*“People come in to buy walking boots, maps, compasses, equipment, and clothing as well as footwear.”*

Case study examples to help demonstrate how the routes have benefitted businesses can be found in Appendix 3.

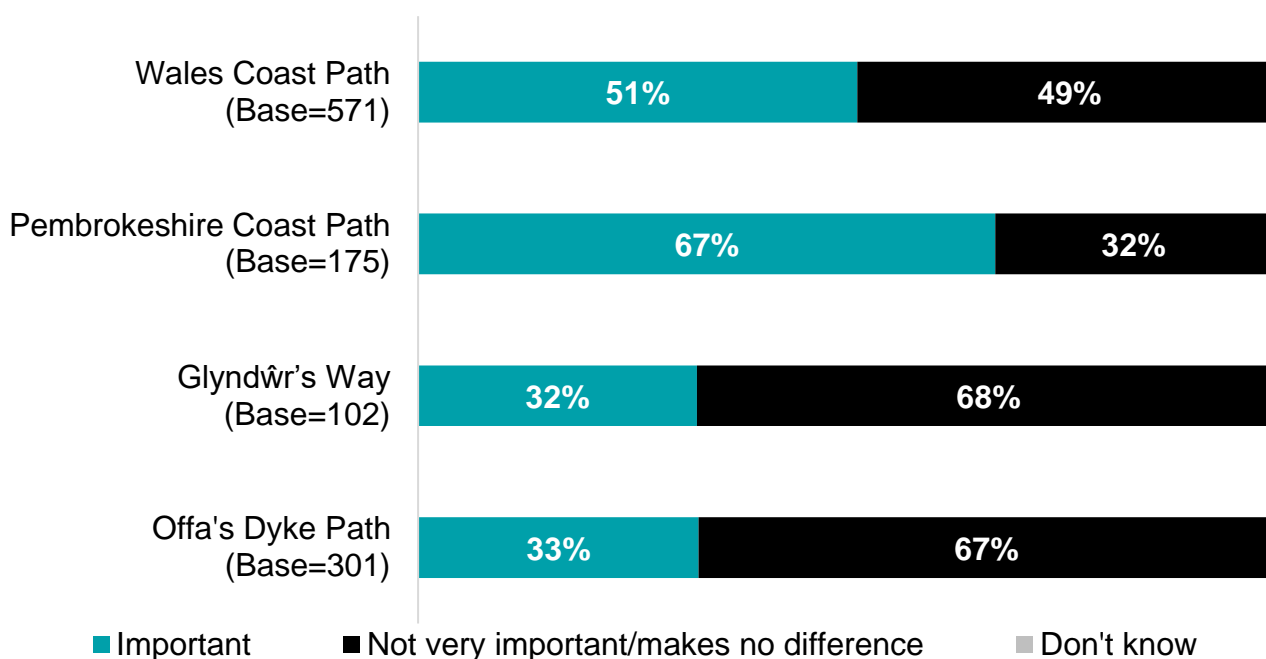
## Importance of routes to businesses

All businesses close to or benefitting from a particular route were asked to rate the importance of each to their business' success.

Figure 14 shows that 51% of all businesses close to or that benefit from the Wales Coast Path consider the route to be important to the success of their business. This increases to 67% when looking at the Pembrokeshire Coast Path separately.

Meanwhile, 33% of businesses close to or benefitting from Offa's Dyke Path and 32% for Glyndŵr's Way consider these routes important to the success of their business.

Figure 14: Importance of routes to business success



*Bases: All businesses (102-571) Q02. How would you describe the importance of each of the following path/trails to the success of your business/organisation? Figures below 5% are not shown on chart for neatness.*

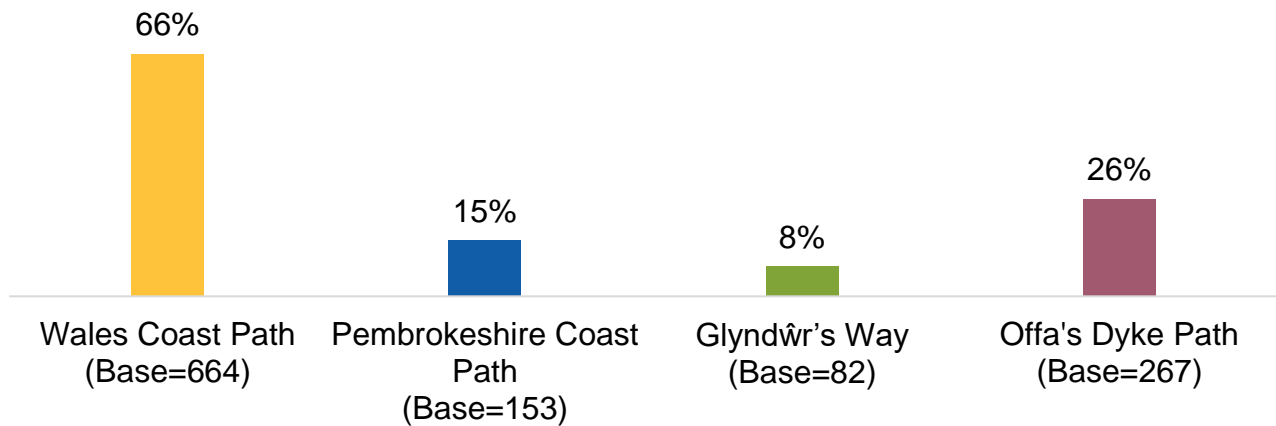
## Assigned route

After answering the above questions, businesses were assigned a route and asked to respond to the remaining survey questions based on that assigned route. In instances where businesses were located close to or benefitted from more than one route, they were assigned to the one which either a) generated the highest proportion of their sales/turnover or b) they were most reliant on for their business. Full details of how businesses were assigned to a particular route can be found in Section 4.

**Please note: all businesses assigned to the Pembrokeshire Coast Path are also included in the Wales Coast Path results.**

As Figure 15 below indicates, a relatively high proportion of businesses (66%) have been assigned to the Wales Coast Path. Therefore, it should be remembered that the total results for all surveyed routes in this report will be more heavily skewed towards this particular route.

Figure 15: Assigned route



Base: All businesses (1013).

## Impact of assigned route on businesses

To further understand the benefits that each route provides for businesses, all businesses were presented with a list of eight potential benefits and asked to state if they thought the presence of their assigned route has resulted in or contributed to any of the benefits listed.

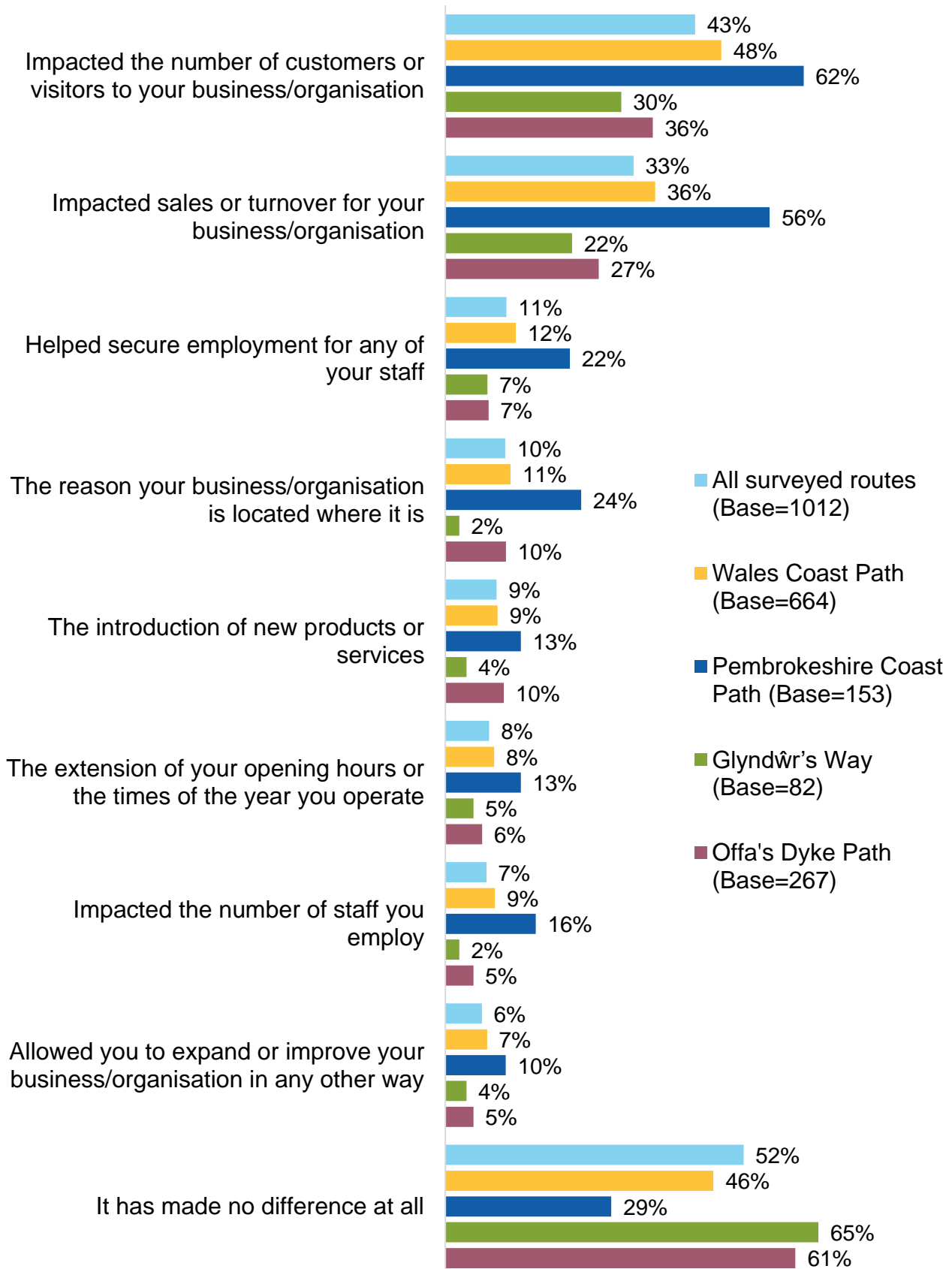
Overall, 48% of all businesses feel their assigned route has made at least some difference, with the most frequently mentioned benefits relating to increased customers (43%) or sales/turnover (33%). Of those businesses that feel their assigned route has had an impact on customers or sales/turnover, the vast majority (at least 98%) feel it has increased in some way (either a lot or a little).

For 11% of all businesses, the routes have helped secure employment for their staff and a similar proportion (9%) have introduced new products or services because of the routes.

When looking at individual routes, increased customers and sales/turnover are cited as the most likely benefits across all routes. For example, 62% of businesses assigned to the Pembrokeshire Coast Path feel it has benefitted the number of customers to their business.

Case study examples to help demonstrate how the routes have benefitted businesses can also be found in Appendix 3.

Figure 16: Benefits of assigned routes on businesses



Base: All businesses (82-1012) Q24a. Do you think the presence of the <INSERT NAME OF ASSIGNED PATH> has resulted in or contributed to any of the following for your business or organisation?

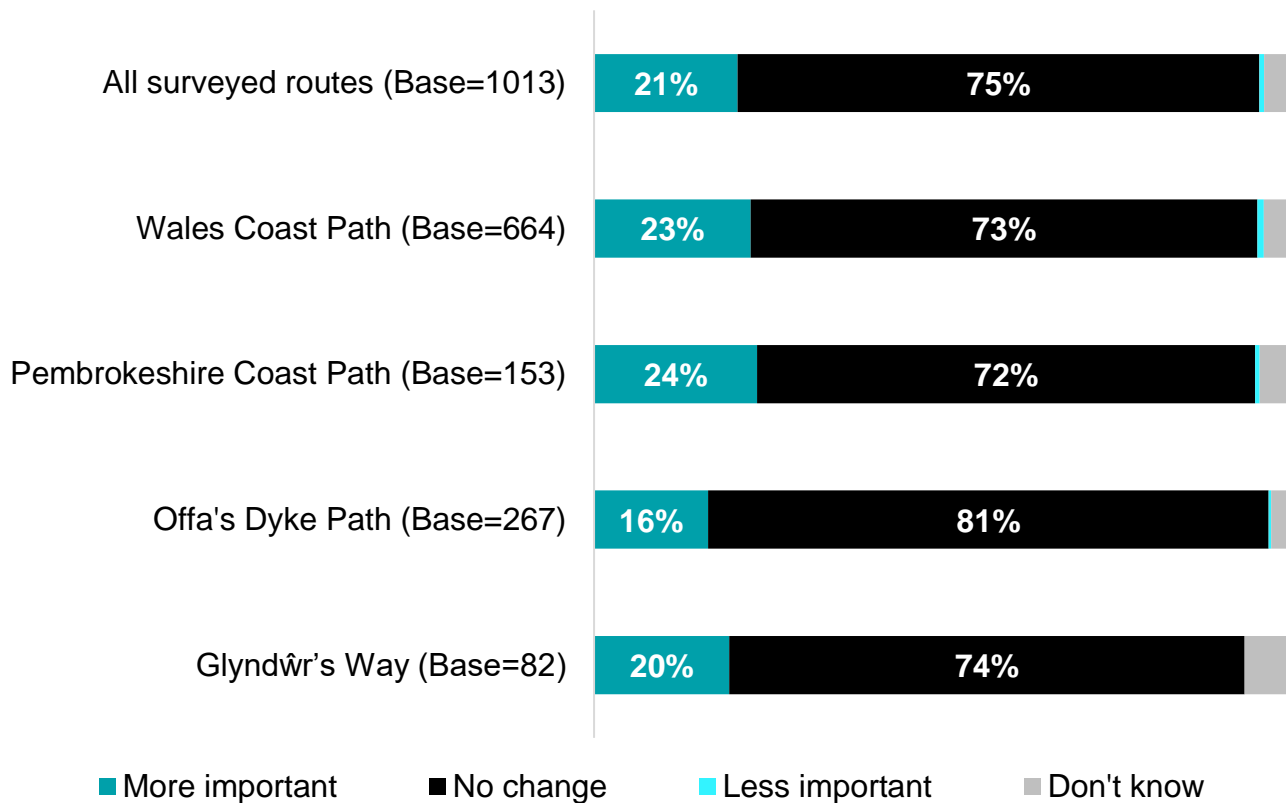
## Future importance of the routes to businesses

Businesses were subsequently asked if they felt there would be any change in the importance of their assigned route in the future. At a total level, 21% agree that their assigned route will become more important to their future success, whilst 75% of businesses state it will remain unchanged. Only 1% think it will become less important, and the remaining 3% are unsure.

When looking at individual routes, 23% of businesses assigned to the Wales Coast Path feel it will become more important to the future success of their business. This proportion is similar when looking at Pembrokeshire Coast Path separately (24%).

20% of businesses assigned to Glyndŵr's Way think it will be more important in the future. Businesses assigned to Offa's Dyke Path are most likely to believe it will remain the same (81%).

Figure 17: Predicted changes in the importance of routes to businesses



*Base: All businesses (1013) Q25a. Do you consider that in the future there will be any change in the importance of the <INSERT NAME OF ASSIGNED PATH at Q04> to the success of your business/organisation? Figures below 5% are not shown for neatness.*

## Quality of assigned route

### Overall views on various aspects of assigned routes

All businesses were asked to provide feedback on six aspects relating to their assigned route. This included accessibility, signage, maintenance of route furniture, maintenance of facilities/services and public transport provision.

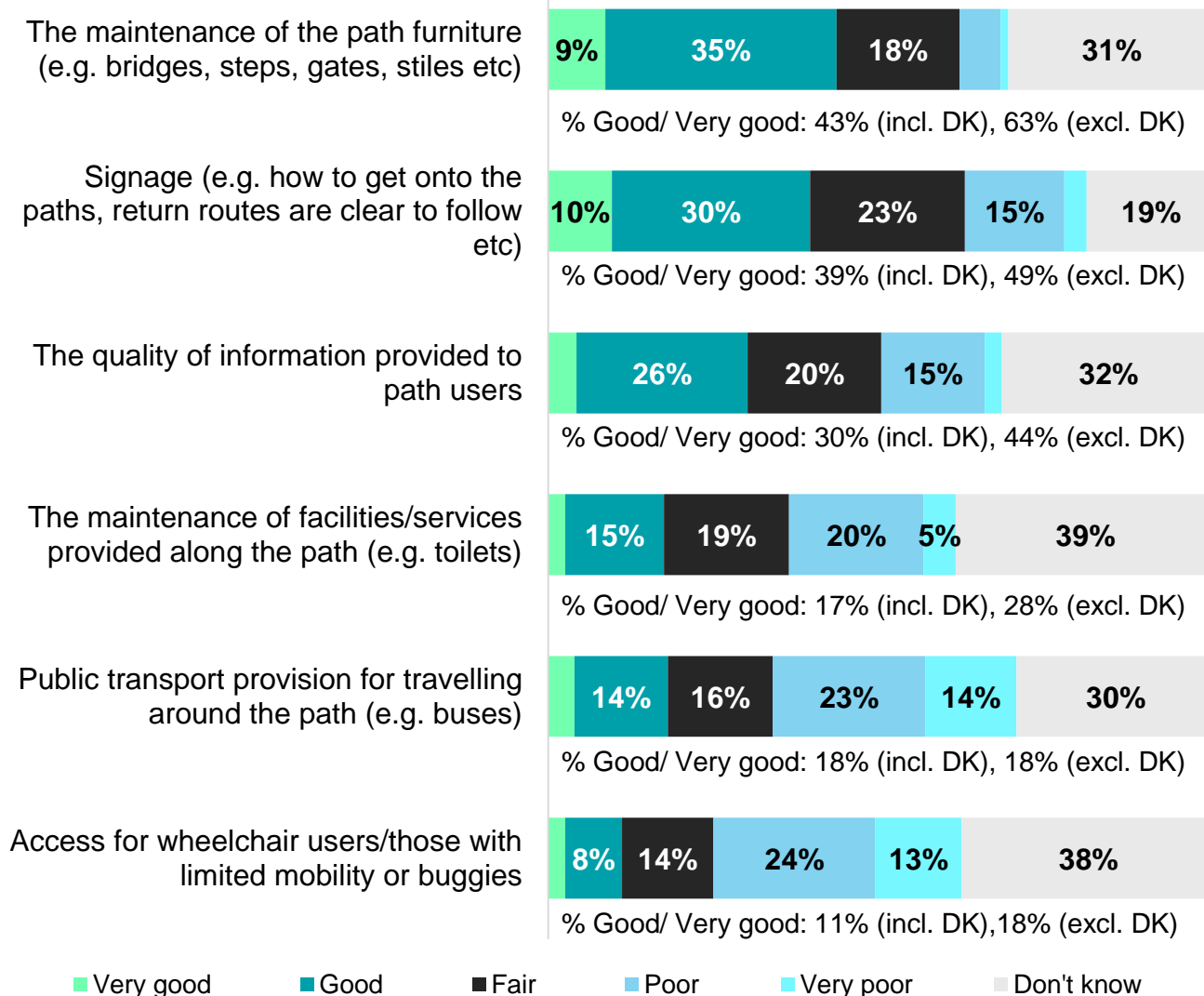
**When reviewing the results in this section, it should be noted that very few (if any) businesses will have sufficient knowledge to comment on their entire assigned route, and therefore, the results are likely to be related to their local section only.**

Overall, of all aspects rated, the maintenance of route furniture is rated most positively with an average of 63% rating this aspect as 'good' or 'very good' (excluding the 'Don't Know' option). Signage (49%) and quality of information (44%) are the next most positively rated. At the other end of the scale, accessibility for wheelchair and buggy users appears most in need of improvement, with only 18% rating this aspect as 'good' or 'very good' (excluding the 'Don't know' option).

However, it should be noted that at least 30% of businesses have selected the 'Don't know' option when commenting on these aspects (with the exception of signage). This indicates a potential lack of awareness of these aspects amongst the businesses surveyed.



Figure 18: Overall views on various aspects of route quality



Base: All businesses (1013) Q20. How do you rate the following aspects? Figures below 5% are not shown for neatness.

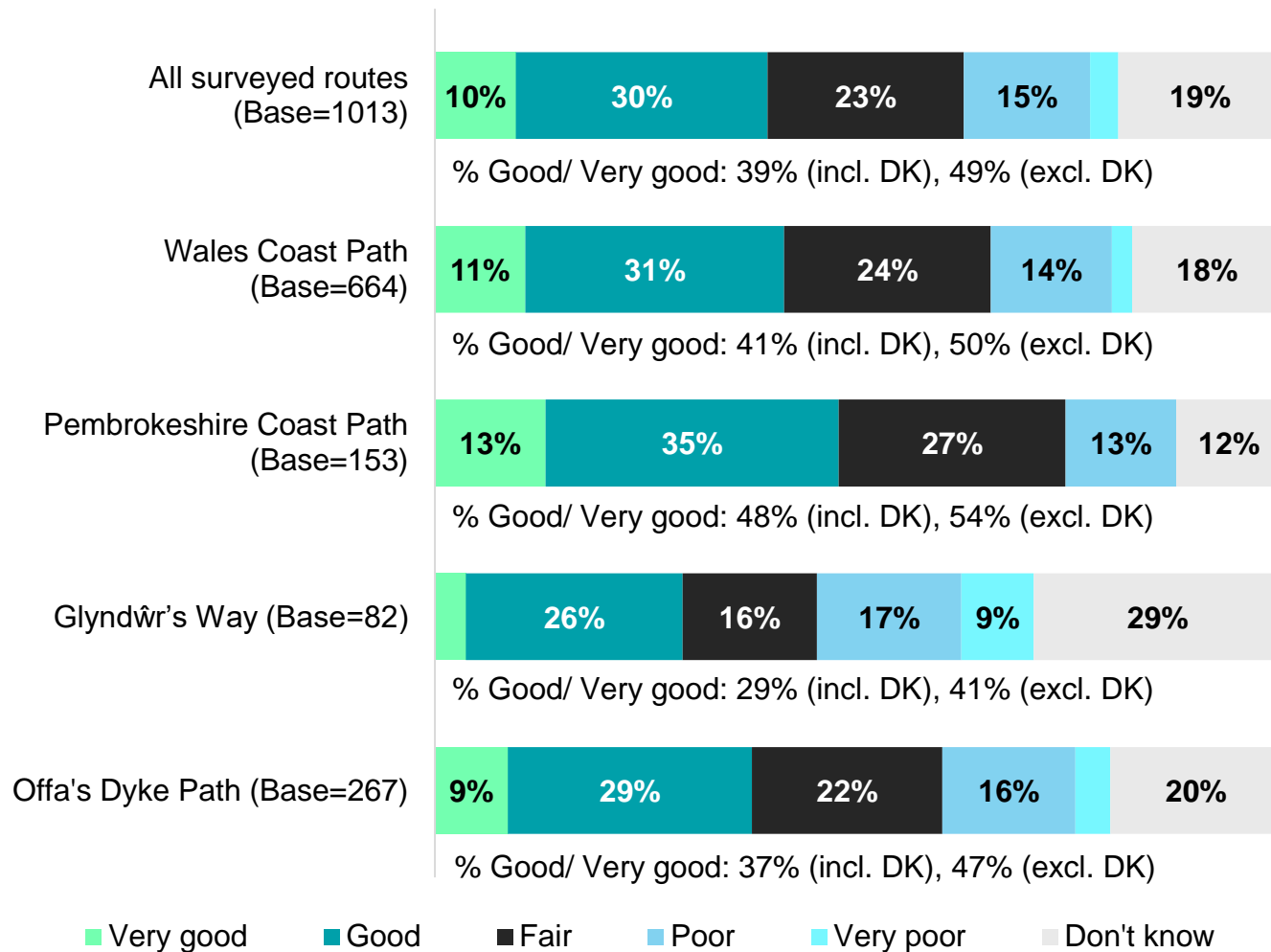
Figures 19-24 below provide a more detailed analysis of the six aspects broken down by individual route.

## Signage

Overall, 49% of businesses rate the signage of their assigned route as 'good' or 'very good' (excluding the 'Don't know' option).

A similar proportion of businesses assigned to the Wales Coast Path rate the signage as 'good' or 'very good'. This increases to 54% when looking at Pembrokeshire Coast Path alone. In addition, 47% of businesses assigned to Offa's Dyke Path rate this aspect positively. However, positive ratings are lower for Glyndŵr's Way (41%).

Figure 19: Views on signage by assigned route



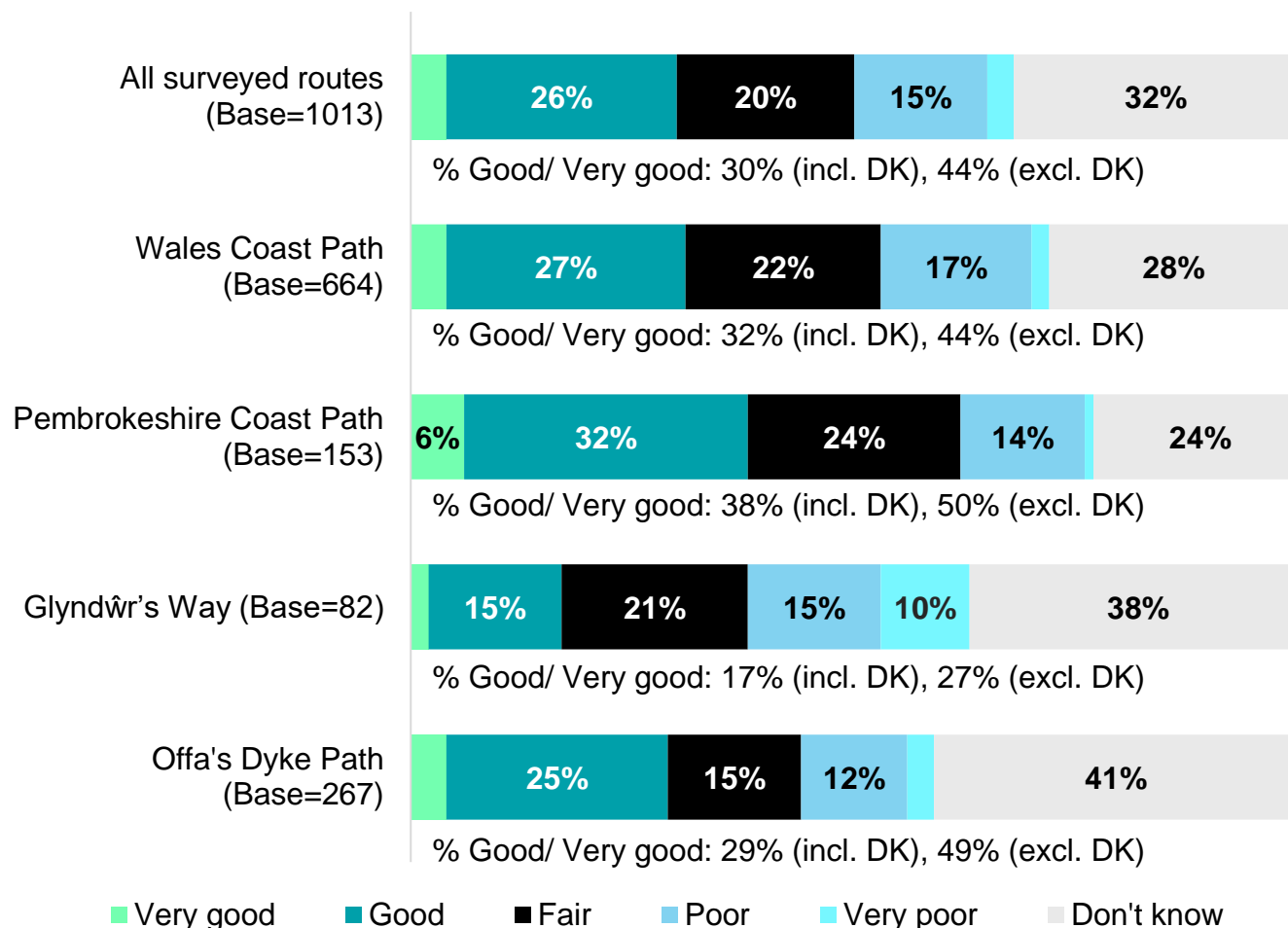
Bases: All businesses (82-1013) Q20. How do you rate the following aspects? Figures below 5% are not shown for neatness.

### Quality of information

On average, 44% of businesses rate the quality of information provided to route users as 'good' or 'very good' (excluding those who say 'Don't know').

Businesses assigned to the Pembrokeshire Coast Path (50%) are most likely to rate the quality of information positively. In contrast, businesses assigned to Glyndŵr's Way are least likely to rate this aspect as 'good' or 'very good'. (27%).

Figure 20: Views on the quality of information provided by assigned route



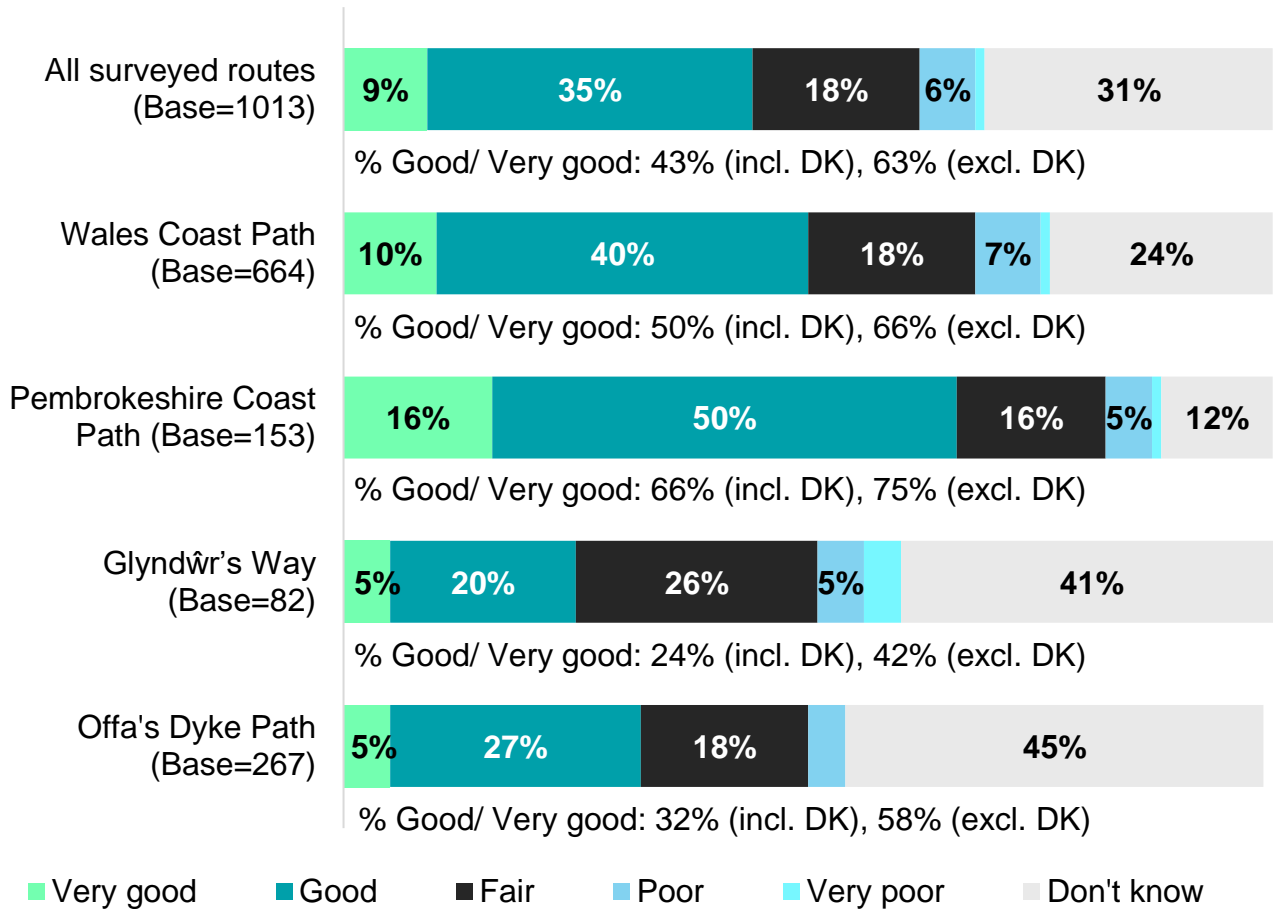
*Bases: All businesses (82-1013) Q20. How do you rate the following aspects? Figures below 5% are not shown for neatness.*

## Maintenance of route furniture

Businesses are generally positive about the maintenance of the route furniture.

66% of businesses assigned to the Wales Coast Path rate this aspect as 'good' or 'very good' (excluding those answering 'Don't know'). This increases to 75% of businesses when looking at Pembrokeshire Coast Path separately. However, positive ratings are lower amongst those assigned to Glyndŵr's Way (42%).

Figure 21: Views on the maintenance of path furniture by assigned route



Bases: All businesses (82-1013) Q20. How do you rate the following aspects? Figures below 5% are not shown for neatness.

## Maintenance of route facilities/services

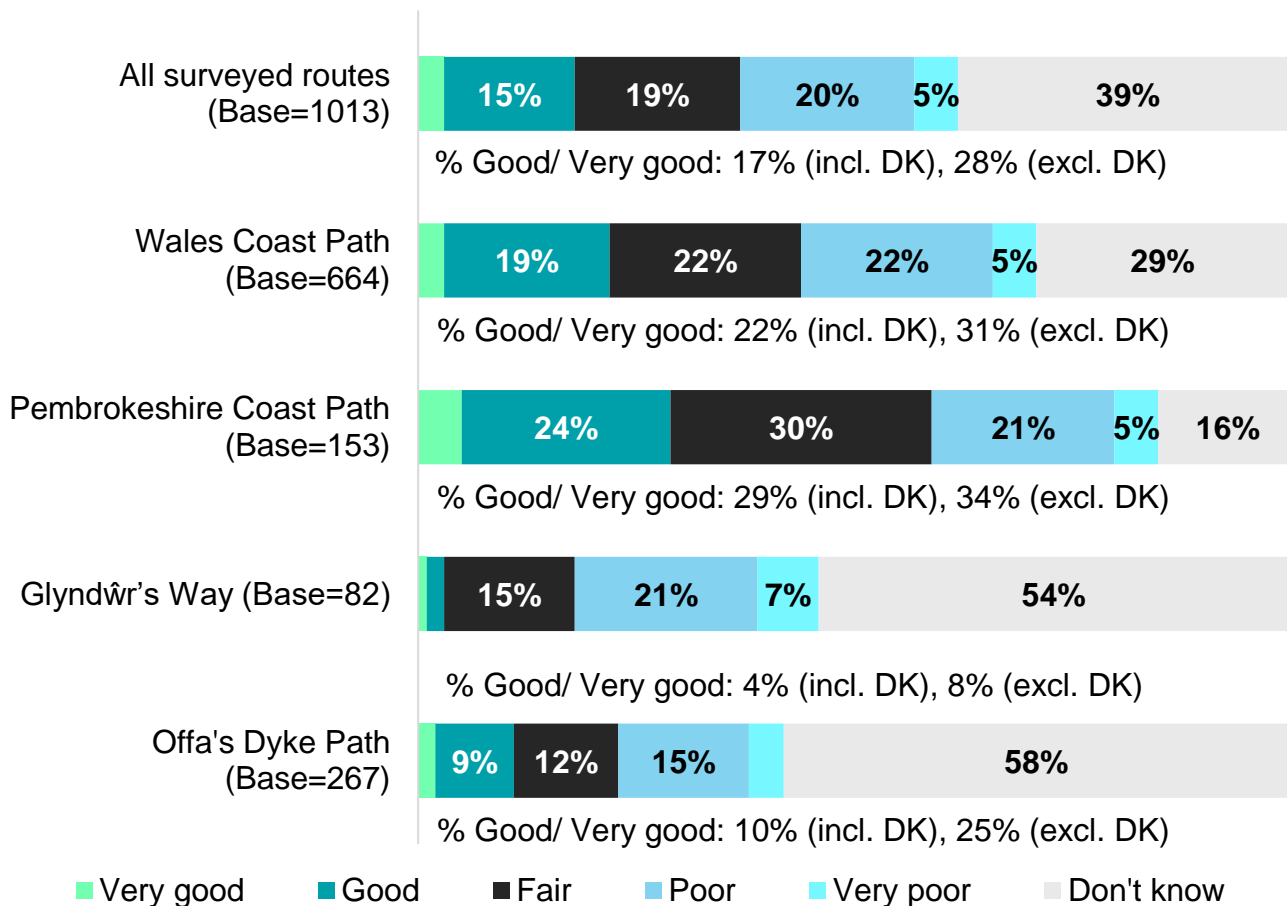
Generally, businesses are more likely to be negative than positive about the maintenance of route facilities and services (e.g. toilets, catering facilities, etc).

When excluding the 'Don't know' option, only 28% of all businesses rate maintenance of facilities/services as 'good' or 'very good'.

The results by assigned route show a similar picture, with positive ratings low across the board. The highest is for Pembrokeshire Coast Path, with 34% of businesses rating this aspect as 'good' or 'very good'.

Ratings are lowest for Glyndŵr's Way, with just 8% rating the maintenance of route facilities and services positively. This is significantly lower than the overall average.

Figure 22: Views on the maintenance of facilities/services by assigned route



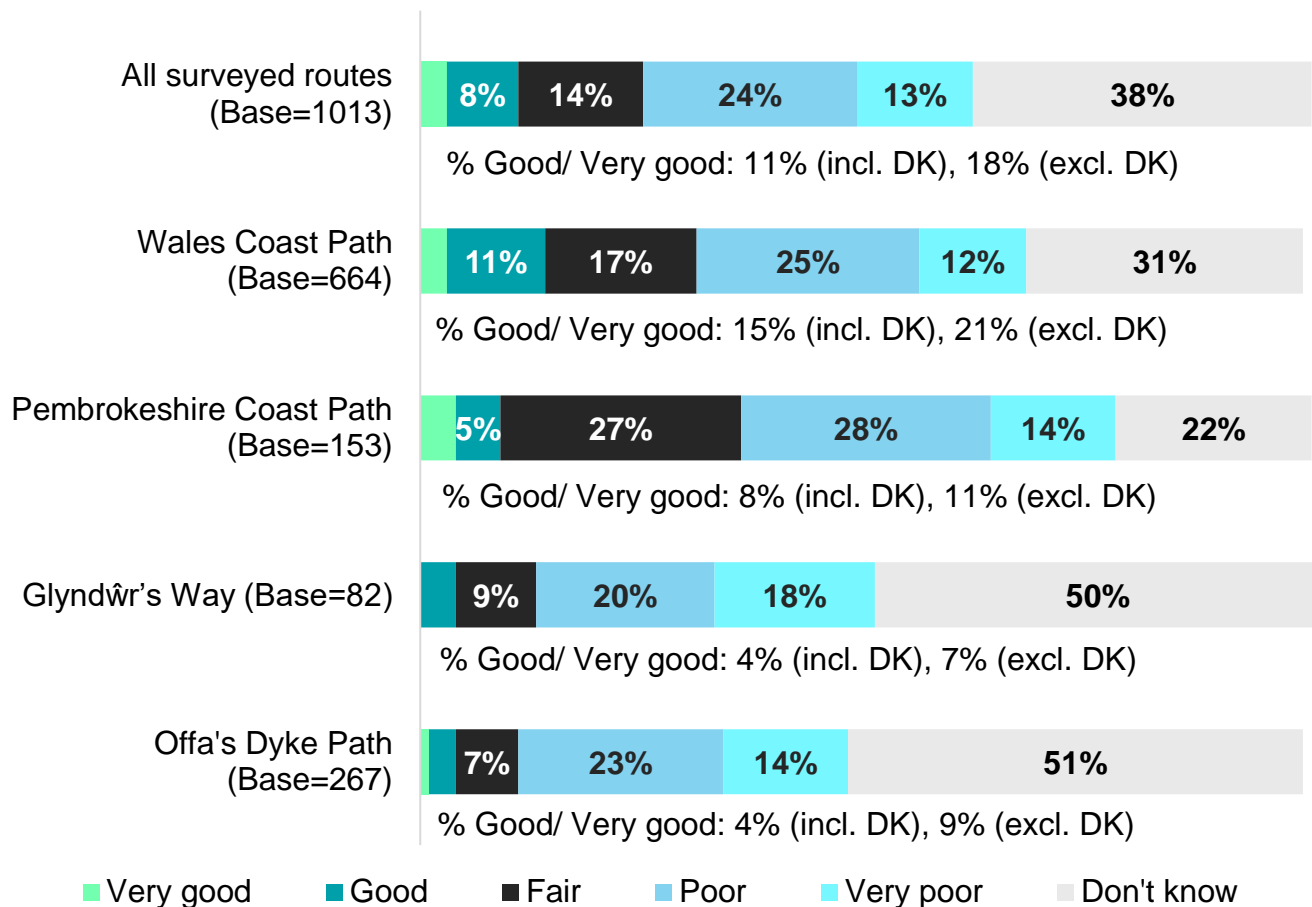
Bases: All businesses (82-1013) Q20. How do you rate the following aspects? Figures below 5% are not shown for neatness.

## Accessibility for wheelchair users/those with limited mobility/buggies

Figure 23 highlights that accessibility for wheelchair users, those with limited mobility and buggies is another potential area for improvement.

When excluding those answering, 'Don't know', only a small proportion of businesses (18%) rate the accessibility of routes for these groups as 'good' or 'very good'. When looking at individual routes, only 21% of businesses assigned to the Wales Coast Path rate this aspect positively. This decreases to 7% for Glyndŵr's Way and 9% for Offa's Dyke Path.

Figure 23: Views on accessibility by assigned route



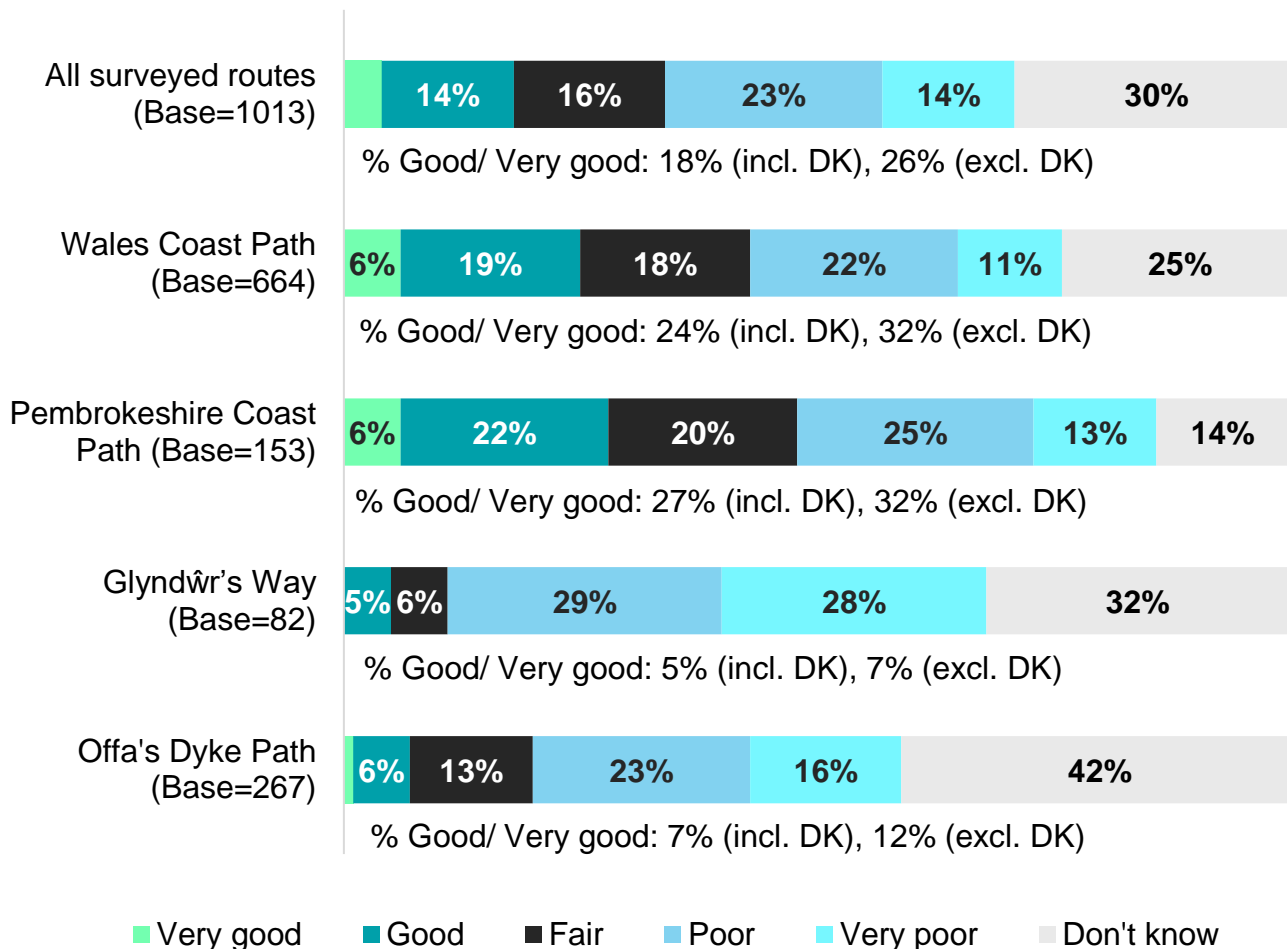
Bases: All businesses (82-1013) Q20. How do you rate the following aspects? Figures below 5% are not shown for neatness.

## Views on public transport provision by assigned route

After excluding 'Don't know' answers, 26% of all businesses rate the provision of public transport as 'good or 'very good'. This increases to a third when looking at businesses assigned to either the Wales Coast Path or specifically Pembrokeshire Coast Path (both 32%).

Despite relatively low positive ratings for this aspect, it is important to note that a quite significant proportion have selected the 'Don't Know' option. This highlights a potential need for Natural Resources Wales and/or its key stakeholders to raise awareness of the public transport options available to customers.

Figure 24: Views on public transport provision by assigned route



Bases: All businesses (82-1013) Q20. How do you rate the following aspects? Figures below 5% are not shown for neatness.

# Promotion of the routes

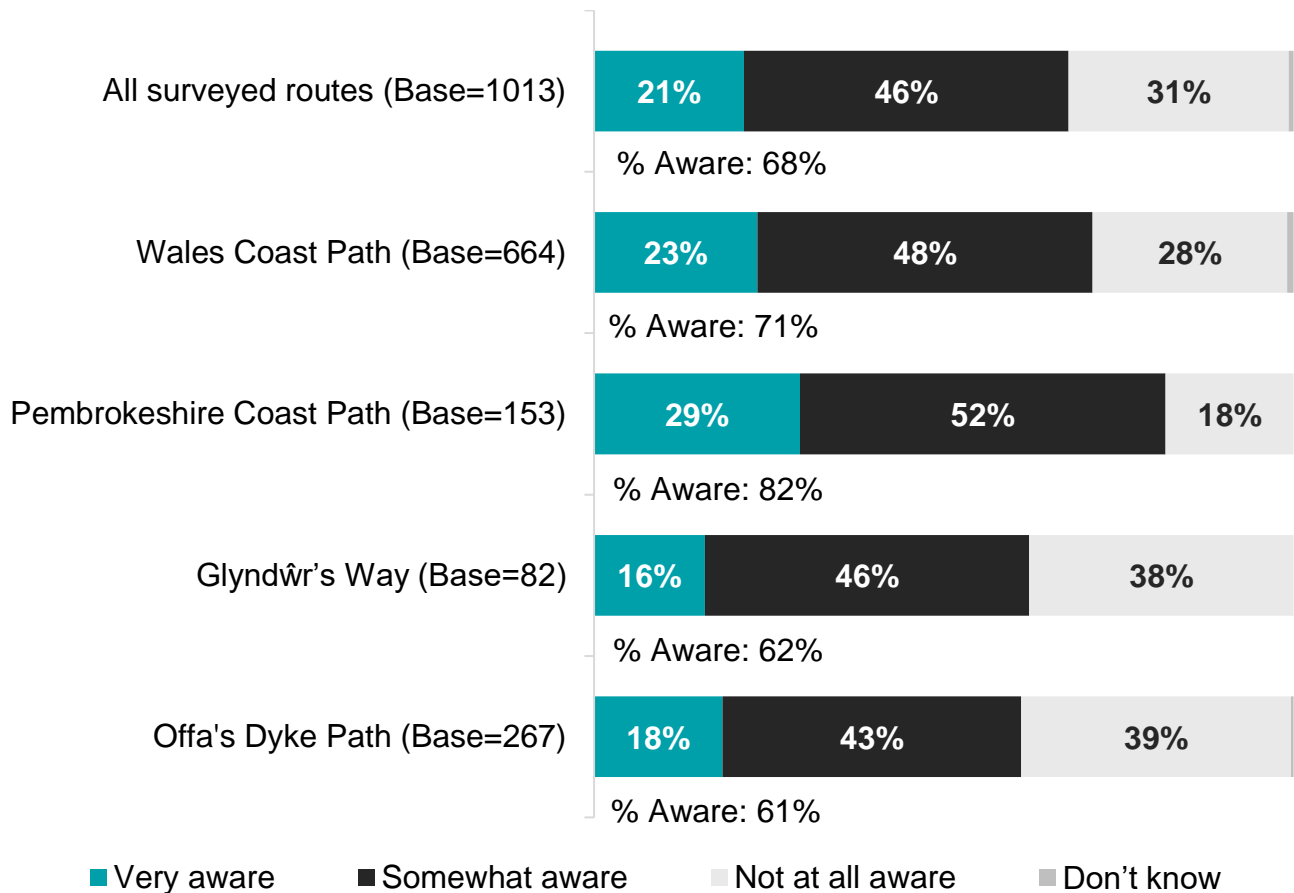
## Brand awareness

Encouragingly, 68% of businesses are aware of their assigned route’s branding or how it is promoted.

When looking at individual routes, 71% of businesses assigned to the Wales Coast Path are aware of its branding. This increases to 82% when looking at the Pembrokeshire Coast Path alone.

In contrast, awareness levels are lower amongst businesses assigned to either Glyndŵr’s Way (62%) or Offa’s Dyke Path (61%).

Figure 25: Awareness of route branding



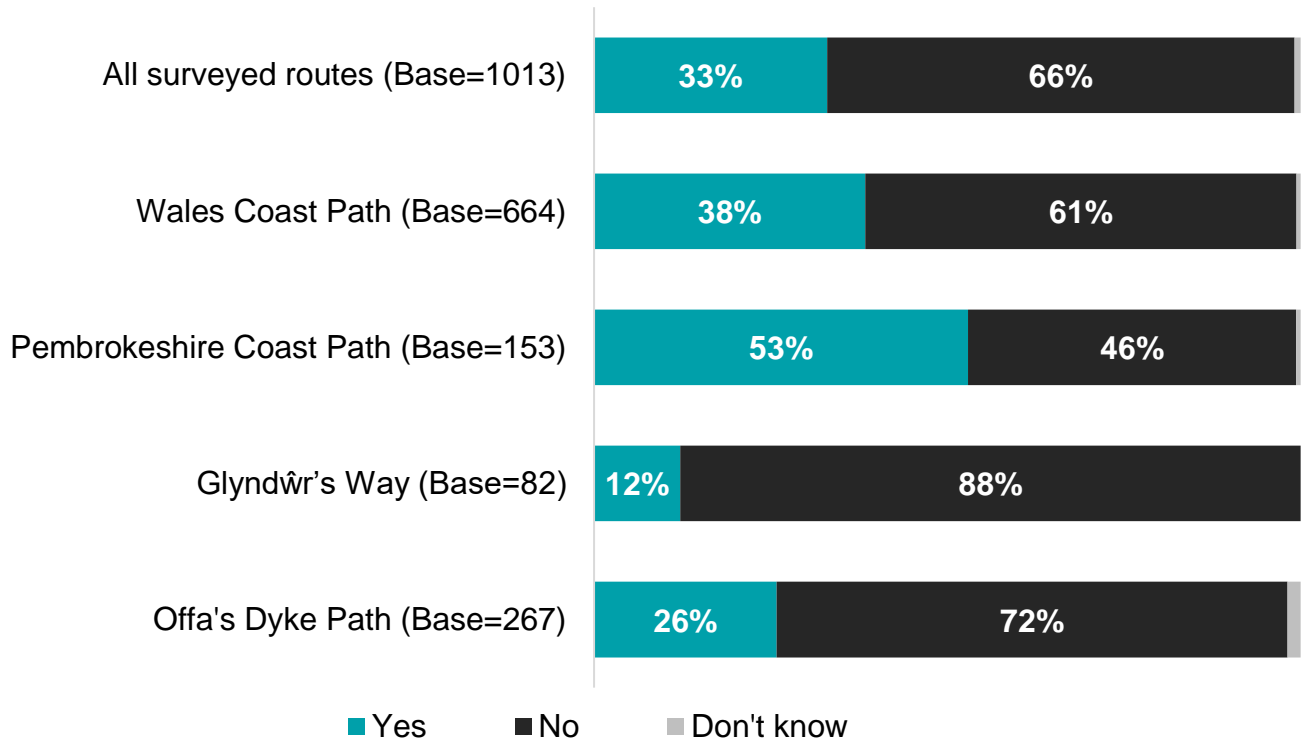
Bases: All businesses (82-1013) Q10. To what extent are you aware of the branding for <INSERT NAME OF ASSIGNED PATH at Q04> or how it’s promoted? Figures below 5% are not shown for neatness.

Linked to this, businesses were asked if they had seen or heard any publicity, advertising, or information about their assigned route in the last year. Figure 26 shows that, on average, 33% of all businesses have done so.



When looking at the results by assigned route, awareness levels are higher than average amongst businesses assigned to the Pembrokeshire Coast Path (53% compared to the average of 33%). Although, they are lower than average amongst those assigned to either Glyndŵr's Way (12%) or Offa's Dyke Path (26%).

Figure 26: Whether businesses have seen or heard any publicity, advertising or information about their assigned route over the past year?



*Bases: All businesses (82-1013) Q12. Over the past year, have you seen or heard any publicity, advertising or information about the <INSERT NAME OF ASSIGNED PATH at Q04>? Figures below 5% are not shown for neatness.*

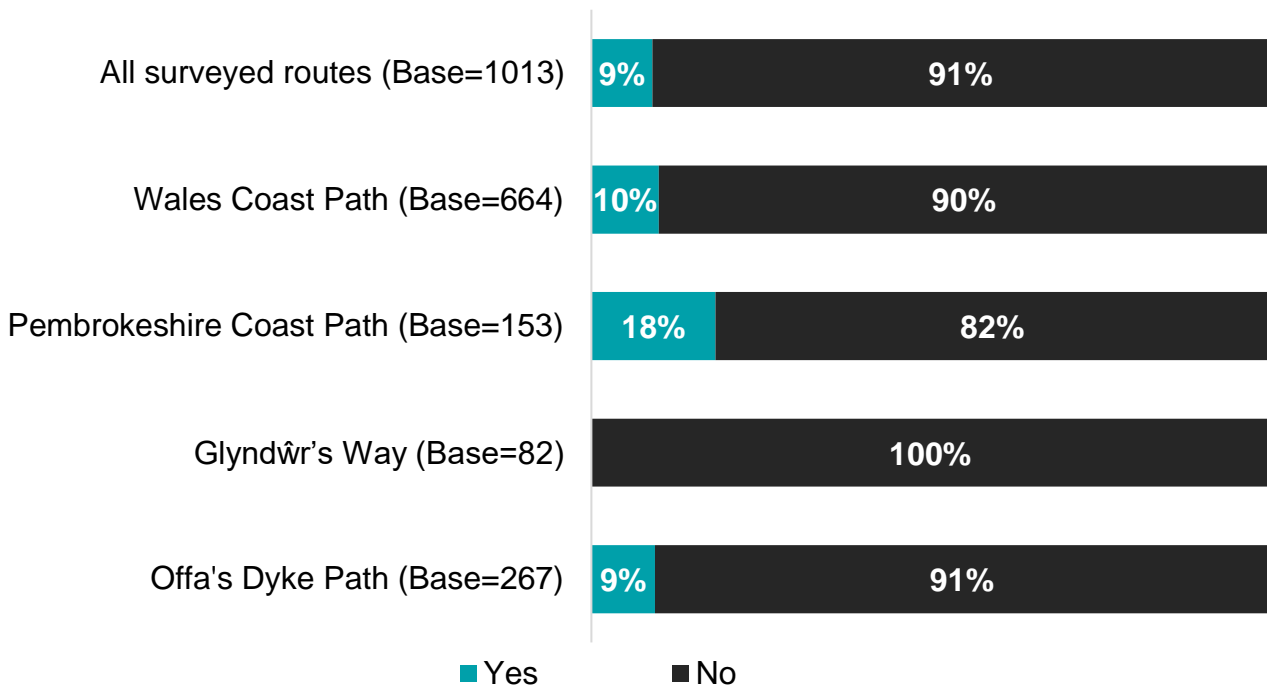
## Received direct communications about assigned route

Businesses were next asked if they could remember receiving any direct communications about their assigned route over the last year. As Figure 27 shows, only a small proportion of all businesses (9%) remembered seeing this information.

There are some variations between individual routes, with 18% of businesses assigned to Pembrokeshire Coast Path claiming to have received this information. This compares to zero businesses assigned to Glyndŵr's Way.

As the base sizes are small, it has not been possible to conduct any detailed analysis by communication channel. However, the results indicate that businesses are more likely to remember seeing direct communications via email.

Figure 27: Whether businesses recall receiving any direct communications over the past year



**Bases:** All businesses (82-1013) Q15. Over the past year, do you recall receiving any direct communications about <INSERT NAME OF ASSIGNED PATH at Q04>? Figures below 5% are not shown for neatness.

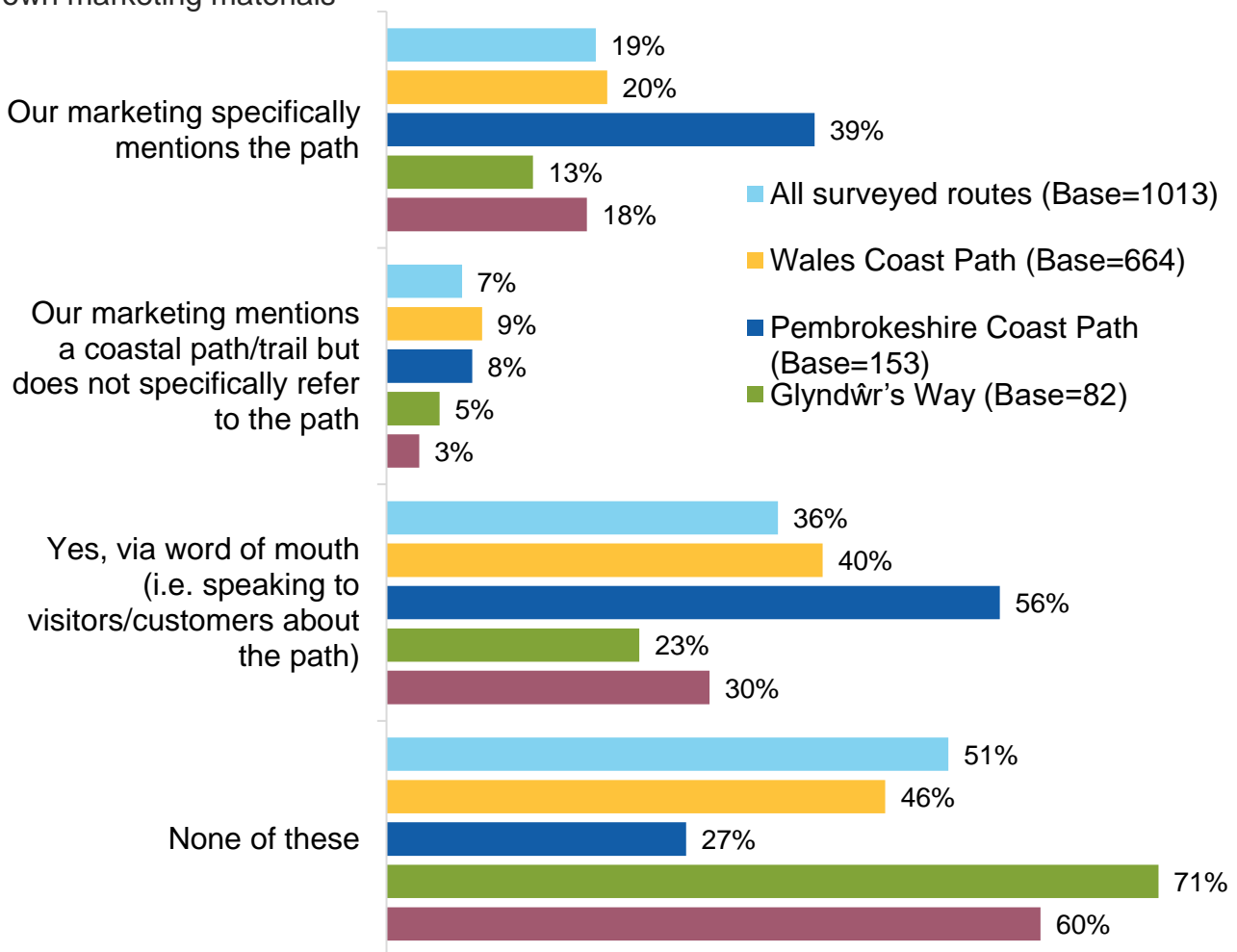
## Promotion of routes in marketing materials

The next topic in the survey focused on the promotion of routes in marketing materials. All businesses were asked if they mention or promote their assigned route in any of their marketing materials (such as their website, social media channels or when speaking to customers). It should be noted that this was a multiple choice question as some businesses may promote the path by word of mouth as well as in physical marketing materials.

On average, 48% of all businesses promote their assigned route in some way, with 19% on average specifically mentioning it in their marketing materials. On the other hand, businesses in the retail sector, as well as manufacturing, building, etc, are significantly more likely than average to state that they do not promote their assigned path in any way (retail – 59%; manufacturers, etc – 84%; all sectors – 51%).

When looking at individual routes, 73% of businesses assigned to Pembrokeshire Coast Path promote it in some way. These businesses are also significantly more likely than average to specifically mention their assigned route in their marketing (39% compared to the average of 19%) and via word of mouth (56% compared to an average of 36%).

Figure 28: Whether businesses mention the name of their assigned route in any of their own marketing materials



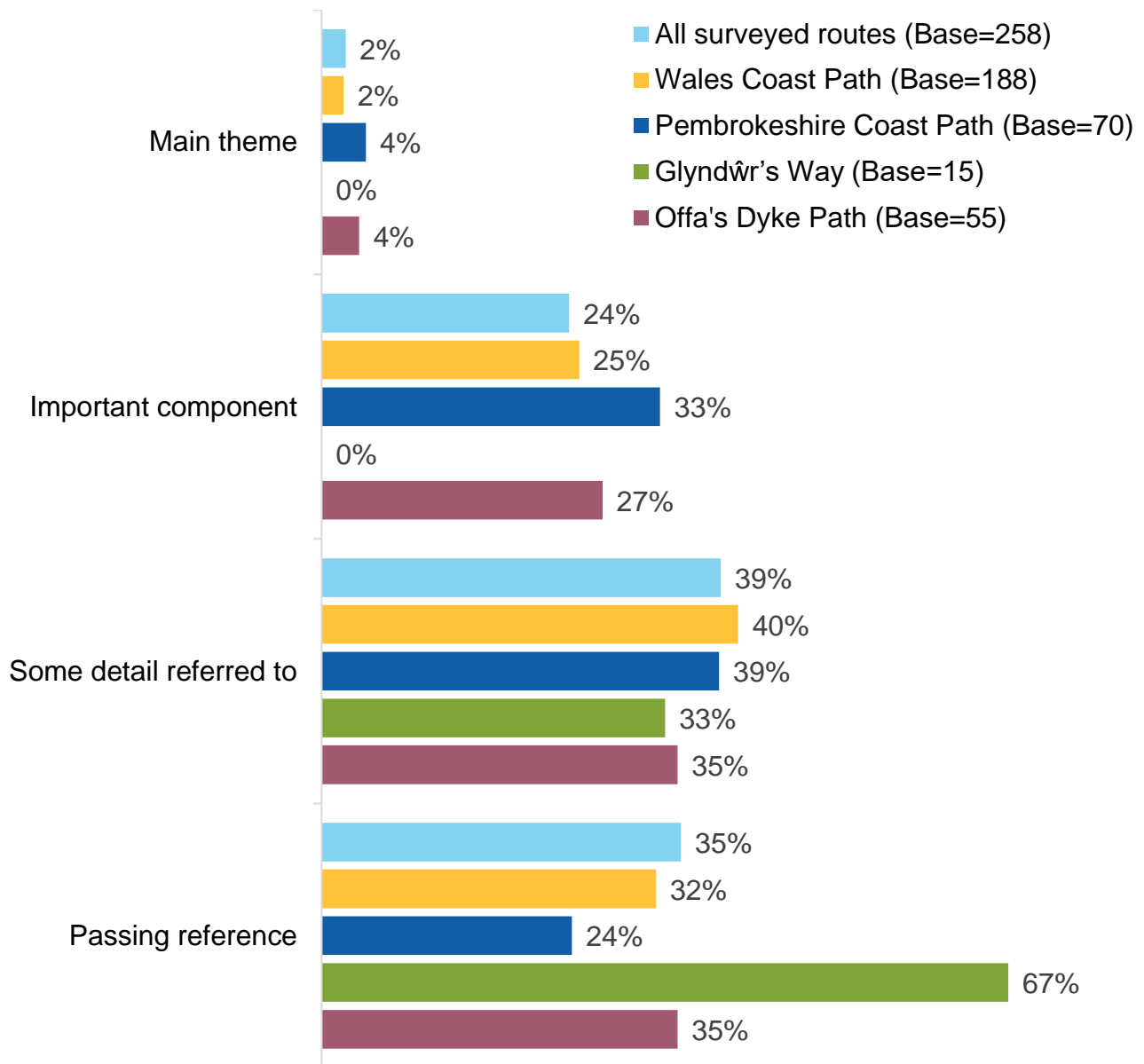
Bases: All businesses (82-1012) Q17. Do you mention or promote <INSERT NAME OF ASSIGNED PATH at Q04> in any of your own marketing materials? Don't know 1%.

## Prominence of routes in marketing materials

When asked about the prominence of routes in their marketing materials, Figure 29 shows that 24% of businesses (on average) consider their assigned route to be an important component. The proportion of businesses that refer to 'some detail' is higher, with 39% of all businesses selecting this option.

Businesses assigned to Glyndŵr's Way are significantly more likely than average (67% compared to 35%) to only include a passing reference in their marketing materials. Although, it should be noted that the sample size for Glyndŵr's Way is based on just 15 responses.

Figure 29: Prominence of assigned routes in marketing materials



Bases: All businesses (15-258) Q18. Which of the following best describes how prominent <INSERT NAME OF ASSIGNED PATH at Q04> is in your marketing? \*Low base of just fifteen respondents.

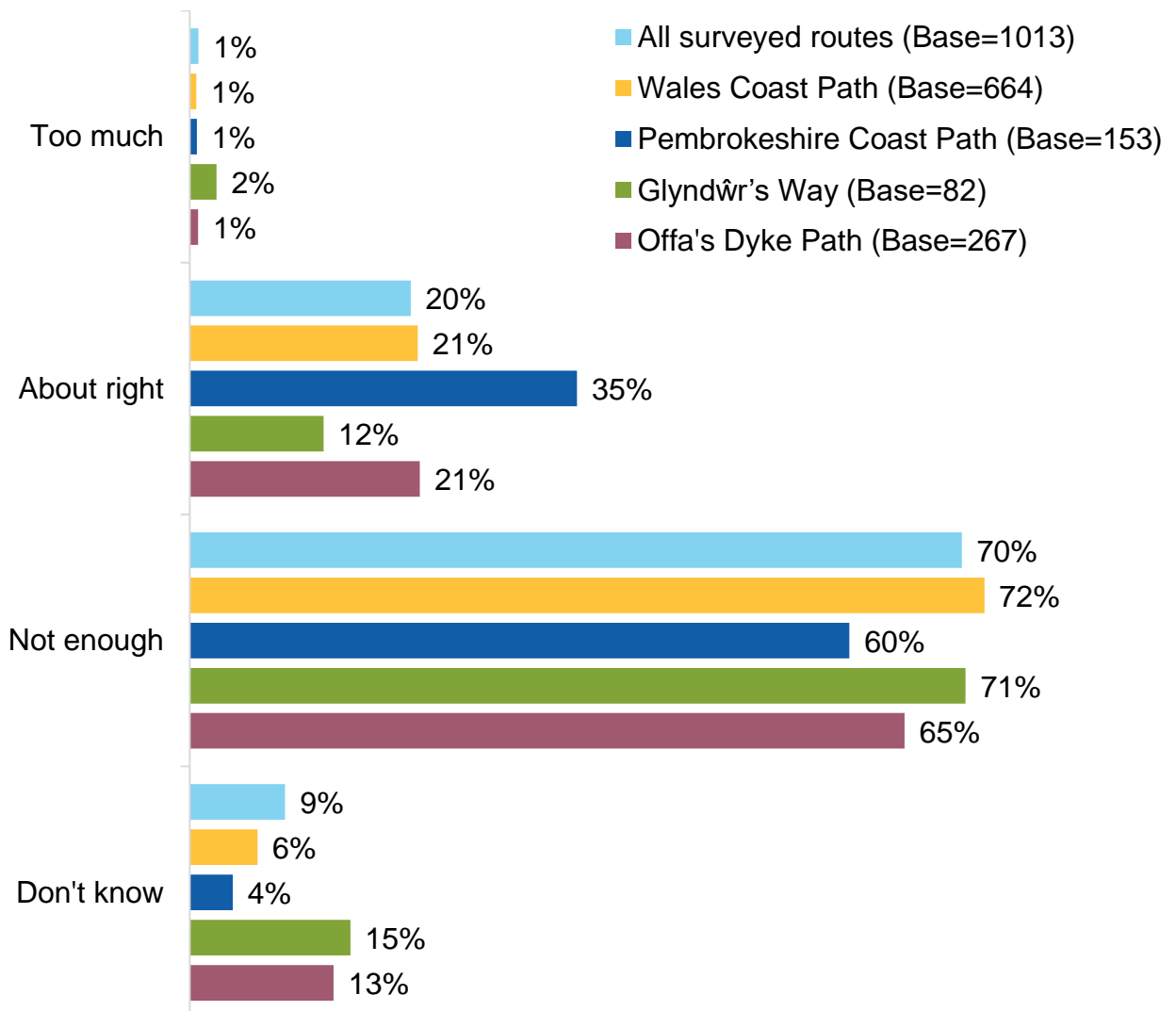
## Views on promotion of the routes

All businesses were subsequently asked if they think their assigned route is promoted too much, about right or not enough.

Figure 30 shows that overall, 70% of businesses think their assigned route should be promoted more. These figures are similar for the Wales Coast Path (72%) and Glyndŵr's Way (71%). However, a higher than average proportion of businesses assigned to Pembrokeshire Coast Path (35%) consider their assigned routes to be promoted 'about right'.

Whilst reasons behind this were not explored in the quantitative survey, this was explored during the follow-up qualitative interviews. Businesses offered a range of suggestions/improvements which ranged from introducing national marketing campaigns to providing more detailed free literature (rather than having to purchase guidebooks for example).

Figure 30: Levels of promotion by assigned route



Bases: All businesses (82-1013) Q19. Overall, do you think the <INSERT NAME OF ASSIGNED PATH at Q04> is promoted?

# Encouraging more customers to routes

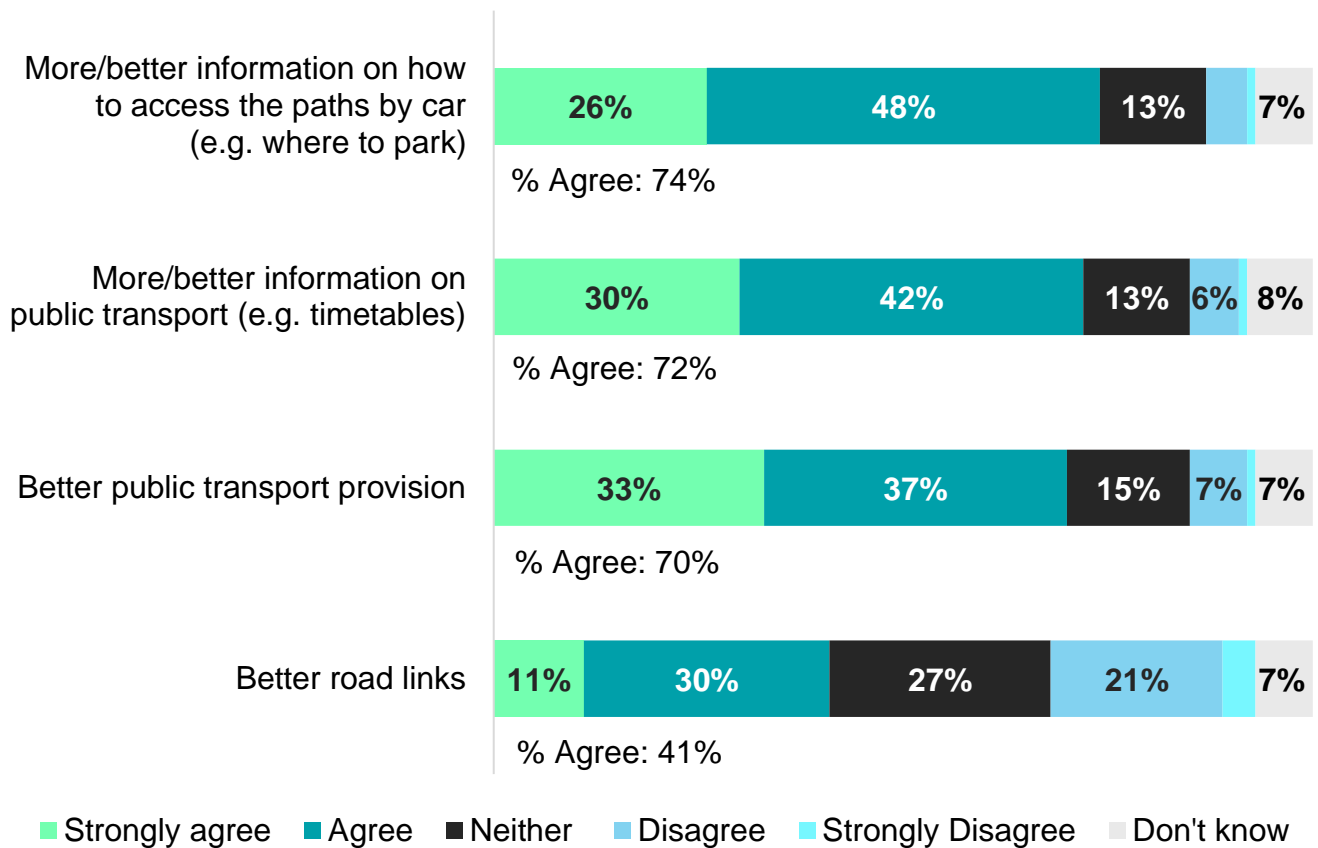
## Overall views on ways to encourage more customers

Businesses were presented with four potential improvements to the routes and asked to state to what extent they agree or disagree whether they are needed.

As Figure 31 shows, 74% of businesses feel that more/better information on how to access the routes by car is needed. This is closely followed by more/better information on public transport, such as timetables (72%) and better public transport provision (70%). Improvements to public transport provision were also highlighted as an area for improvement in Figure 24 above.

On a more positive note, only 41% of businesses think better road links are needed.

Figure 31: Methods to help encourage more people to visit the routes



*Bases: All businesses (1013) Q21. To what extent do you agree or disagree that each of the following are needed to encourage more people to visit <INSERT NAME OF ASSIGNED PATH at Q04>? Figures below 5% are not shown for neatness.*

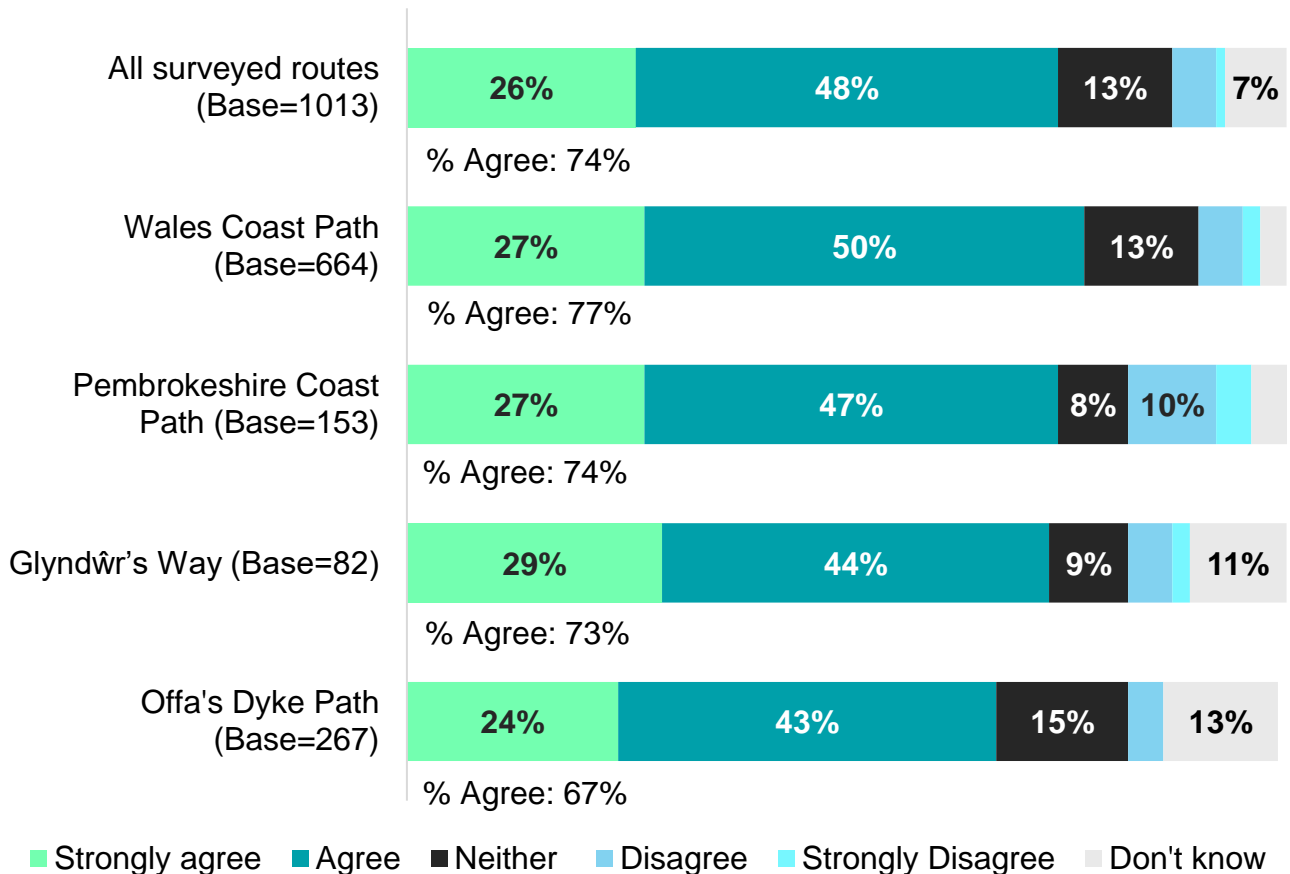
Figures 32-35 below provide a more detailed analysis of each potential improvement broken down by individual route.

## More or better information on how to access the routes by car

More or better information on how to access the routes by car is seen as the top potential area for improvement, with 74% of all businesses agreeing that this is needed.

When looking at individual routes, agreement levels are similar for the Wales Coast Path (77%), Pembrokeshire Coast Path (74%) and Glyndŵr's Way (73%). Agreement is slightly lower, but still relatively high, for Offa's Dyke Path (67%).

Figure 32: Agreement levels - More/better information on how to access the routes by car



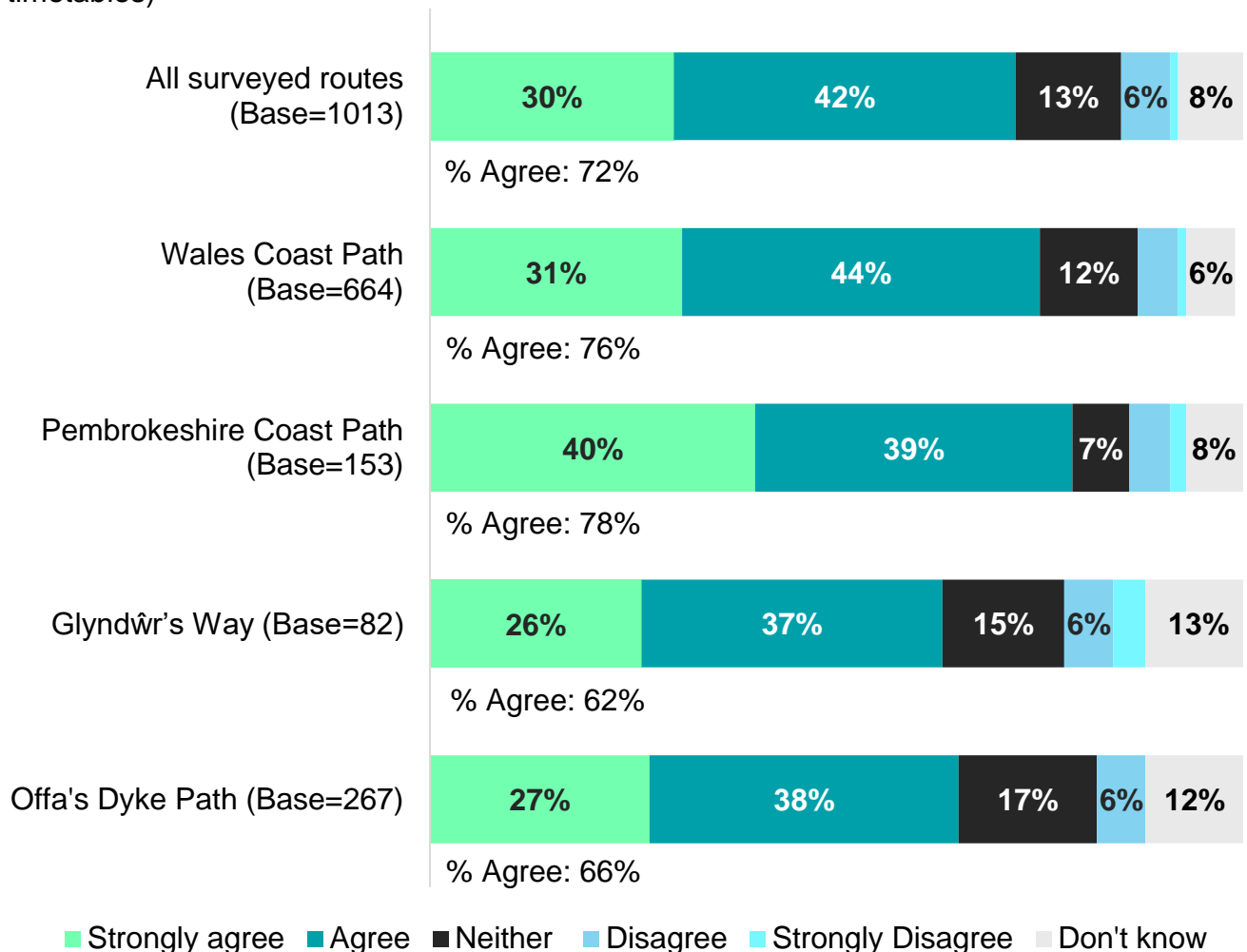
*Bases: All businesses (82-1013) Q21. To what extent do you agree or disagree that each of the following are needed to encourage more people to visit <INSERT NAME OF ASSIGNED PATH at Q04>? Figures below 5% are not shown for neatness.*

## More/better information on public transport (e.g. timetables)

72% of all businesses agree that more/better information on public transport (e.g. timetables) is needed. This increases to 76% for the Wales Coast Path and 78% for Pembrokeshire Coast Path only.

Fewer businesses assigned to Glyndŵr's Way (62%) or Offa's Dyke Path (66%) think more or better information on public transport (e.g. timetables) is required.

Figure 33: Agreement levels - More/better information on public transport (e.g. timetables)



*Bases: All businesses (82-1013) Q21. To what extent, do you agree or disagree that each of the following are needed to encourage more people to visit <INSERT NAME OF ASSIGNED PATH at Q04>? Figures below 5% are not shown for neatness.*

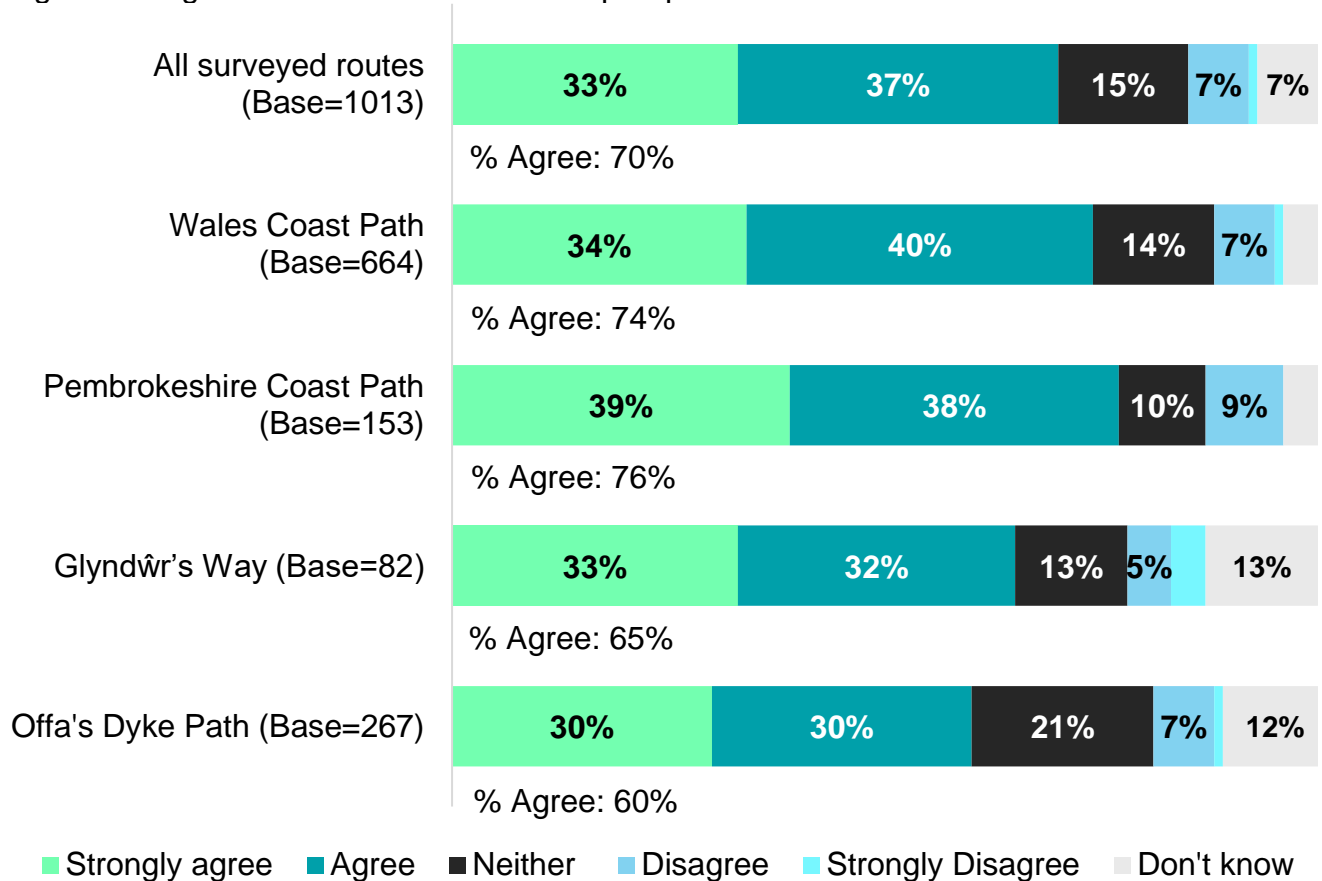


## Better transport provision

Overall, 70% of businesses agree that better transport provision is needed to encourage more people to visit the routes.

When looking at individual routes, around three-quarters of businesses assigned to the Wales Coast Path (74%) or Pembrokeshire Coast Path (76%) agree with this improvement. Businesses assigned to Offa's Dyke Path are least likely to agree that better transport provision is needed (60%).

Figure 34: Agreement levels - Better transport provision



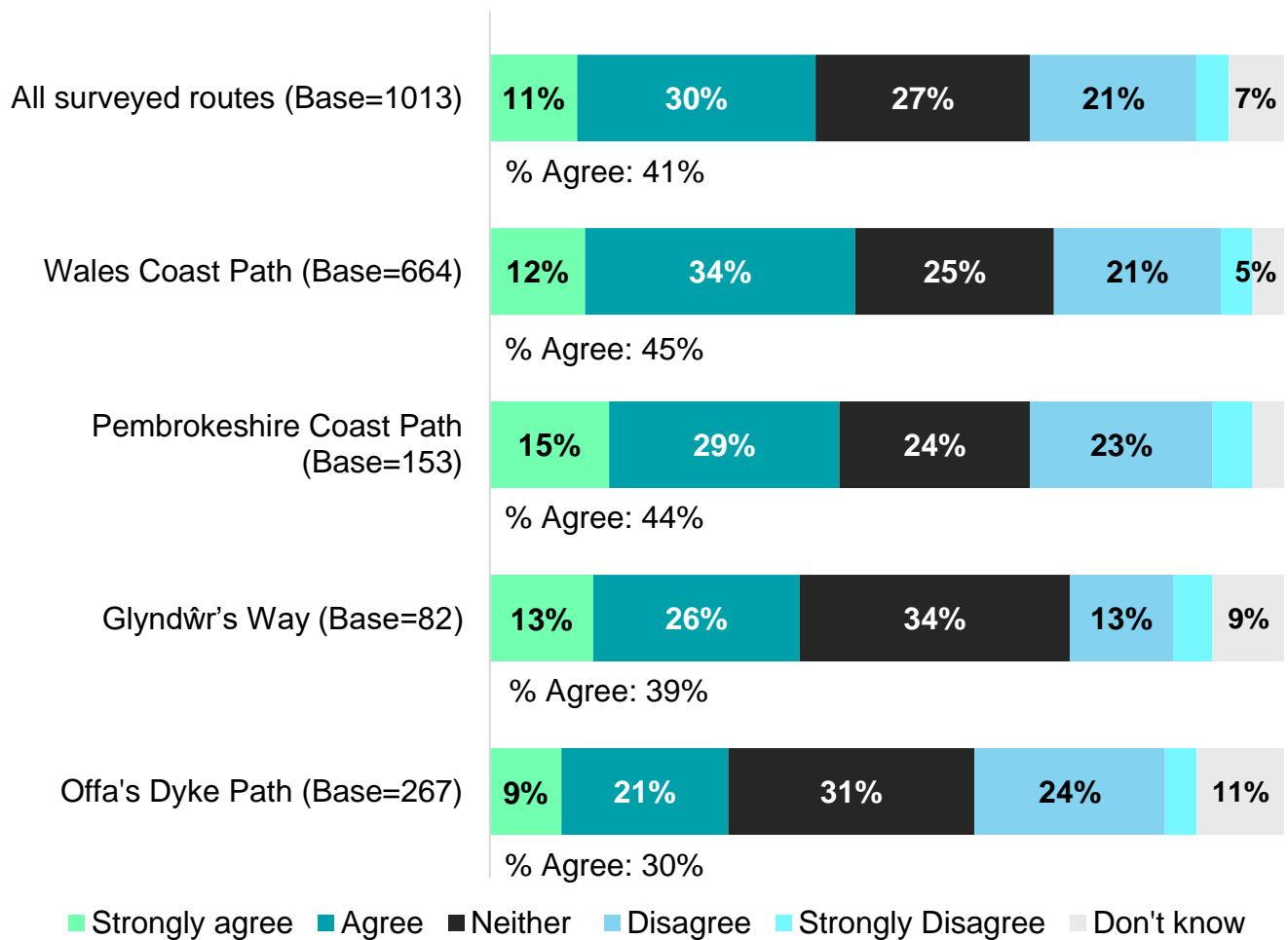
*Bases: All businesses (82-1013) Q21. To what extent do you agree or disagree that each of the following are needed to encourage more people to visit <INSERT NAME OF ASSIGNED PATH at Q04>? Figures below 5% are not shown for neatness.*

## Better road links

Overall, improving road links is considered the least necessary area for improvement, with only 41% of businesses agreeing.

By individual route, businesses assigned to the Wales Coast Path (45%) and Pembrokeshire Coast Path only (44%) are most likely to agree. In comparison, those assigned to Offa's Dyke Path are least likely to agree (30%) that better road links will help encourage more customers to visit.

Figure 35: Agreement levels - better road links



*Bases: All businesses (82-1013) Q21. To what extent, do you agree or disagree that each of the following are needed to encourage more people to visit <INSERT NAME OF ASSIGNED PATH at Q04>? Figures below 5% are not shown for neatness.*

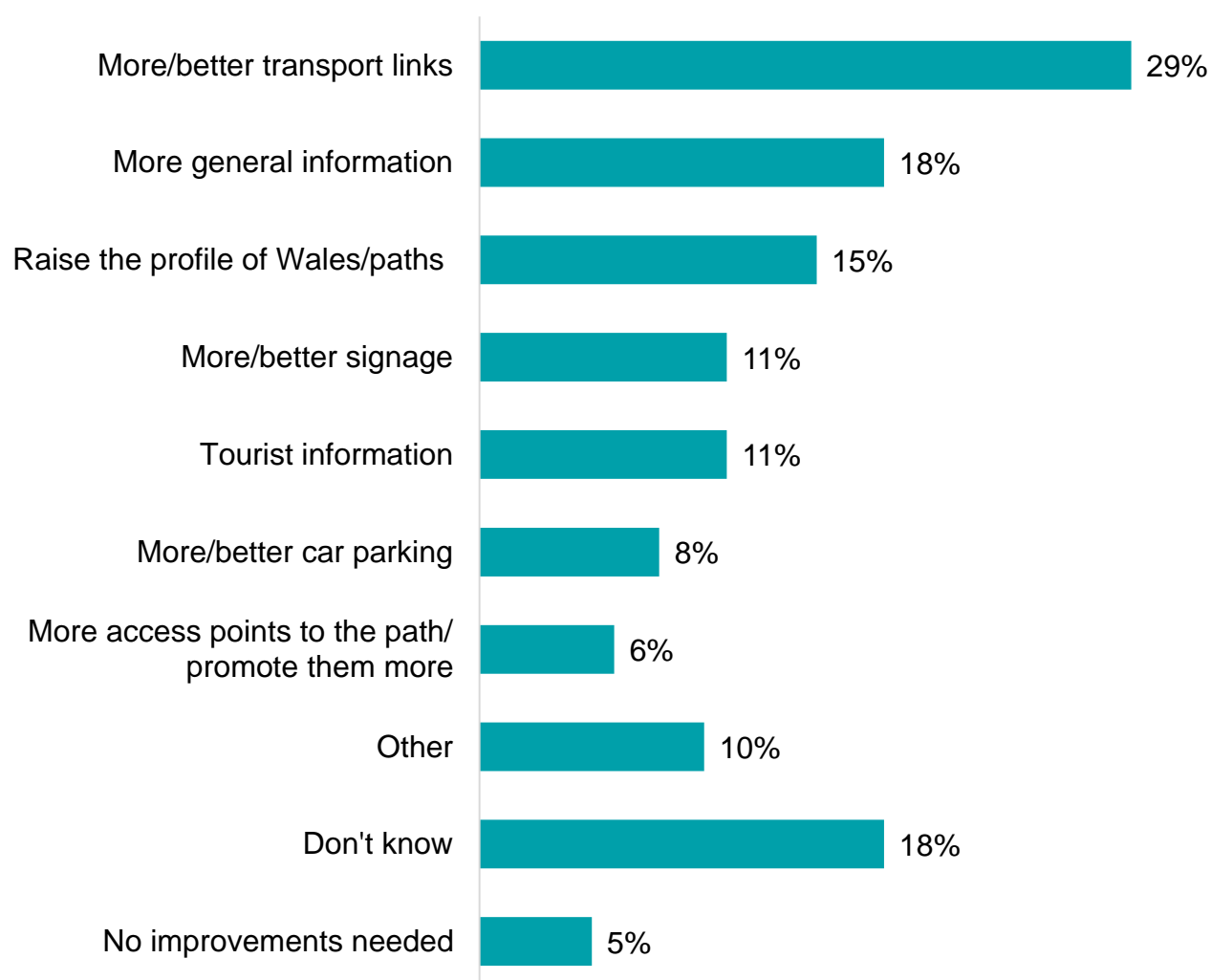
## Suggestions to help customers travel around the routes

Linked to the topic of transport, all businesses were asked what improvements (if any) they think are needed to help customers travel around or access the routes.

Overall, 75% of businesses offered suggestions, with the remaining 25% either stating 'no improvements are needed', 'Don't know', or had nothing further to add/no comment. Please note: this includes 2% who did not respond to the question (not shown on the chart).

When looking at the suggestions, the most popular theme relates to needing more/better transport links (29%). 18% think more general information on the routes is needed.

Figure 36: Suggestions to help customers travel around the routes (coded responses)



*Bases: All businesses (1013) Q22. What improvements (if any) do you think are needed to help more customers travel around or access the paths? We are particularly interested in your feedback on transport links/services and also information provision. Figures below 5% are not shown for neatness. 2% not answered.*

**Some example comments from businesses are provided below:**

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

*“The transport infrastructure is a problem here, as people who come here are often mentioning the trains. They find it very difficult to use public transport to get there, unless they use taxis.”*

Figure 37 indicates that the priorities for improvement remain generally consistent across routes. Notably, 21% of businesses assigned to Glyndŵr’s Way are also keen to see improved tourist information.

Figure 37: Top three suggestions to help customers travel around the path by route (coded responses)

<b>All surveyed routes</b>	More/better transport links: <b>29%</b>	More general information: <b>18%</b>	Raise the profile of Wales/paths: <b>16%</b>
Wales Coast Path (including Pembrokeshire Coast Path)	More/better transport links: <b>29%</b>	More general information: <b>18%</b>	Raise the profile of Wales/paths: <b>16%</b>
Pembrokeshire Coast Path	More/better transport links: <b>36%</b>	More general information: <b>15%</b>	More/better car parking: <b>11%</b>
Glyndŵr’s Way	More/better transport links: <b>27%</b>	More general information: <b>27%</b>	Tourist information: <b>21%</b>
Offa’s Dyke	More/better transport links: <b>30%</b>	More general information: <b>15%</b>	Raise the profile of Wales/paths: <b>14%</b>

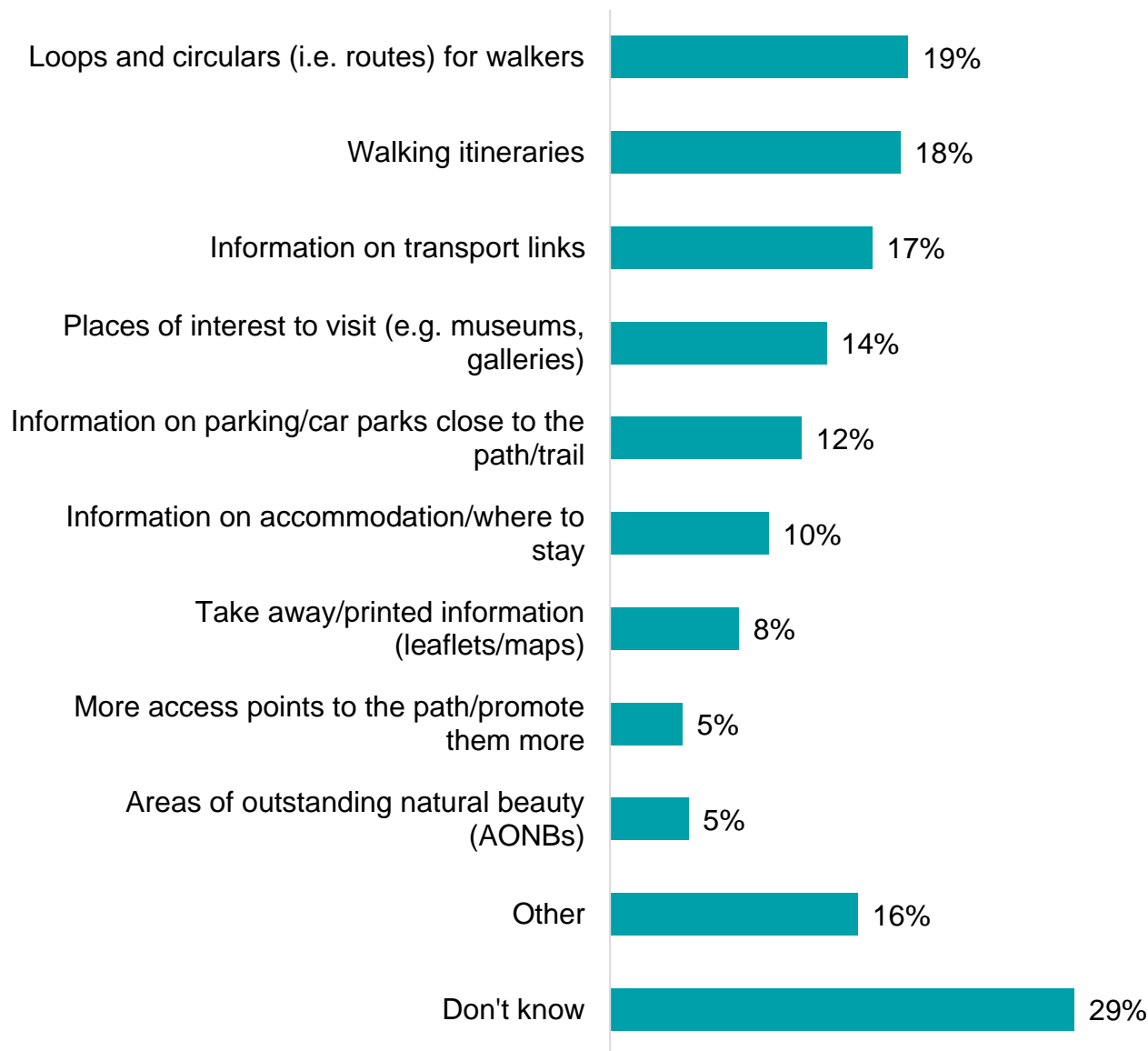
*Bases: All businesses (82-1013) Q22. What improvements (if any), do you think are needed to help more customers travel around or access the paths? We are particularly interested in your feedback on transport links/services and also information provision.*

## Information considered most helpful to route users

The topic of information provision was explored further, with businesses asked what information they think would be most helpful to their customers.

As Figure 38 shows, the most frequently mentioned themes relate to loops or circulars (19%). This is closely followed by walking itineraries (18%) and information on transport links (17%).

Figure 38: Information considered most useful for route users



*Bases: All businesses (1012) Q30. What kind of information do you think is most helpful to your customers or other users of the Wales Coast Path/National Trails? Figures below 5% are not shown for neatness.*

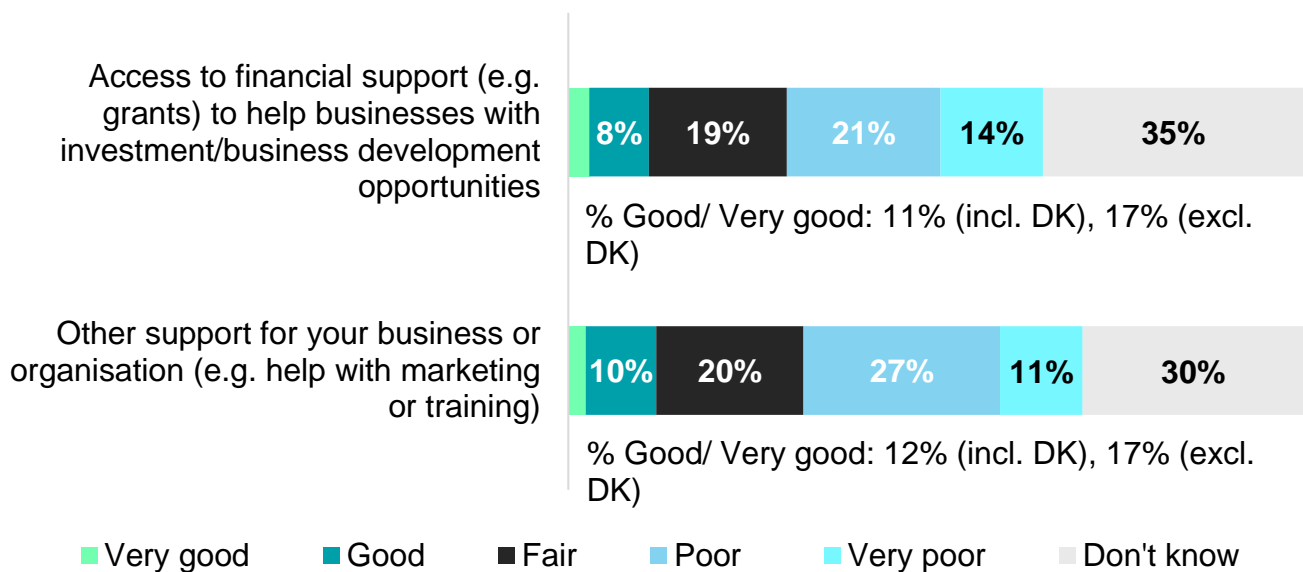
# Business support

## Feedback on the current support available

Figure 39 indicates that 17% of businesses rate the access to financial support or other support as ‘good’ or ‘very good’. (excluding those saying ‘Don’t know’).

However, it should be noted that in both cases, a high proportion of businesses selected the ‘Don’t know’ option. This highlights a potential lack of awareness of the support available to businesses.

Figure 39: Ratings on current support available to businesses



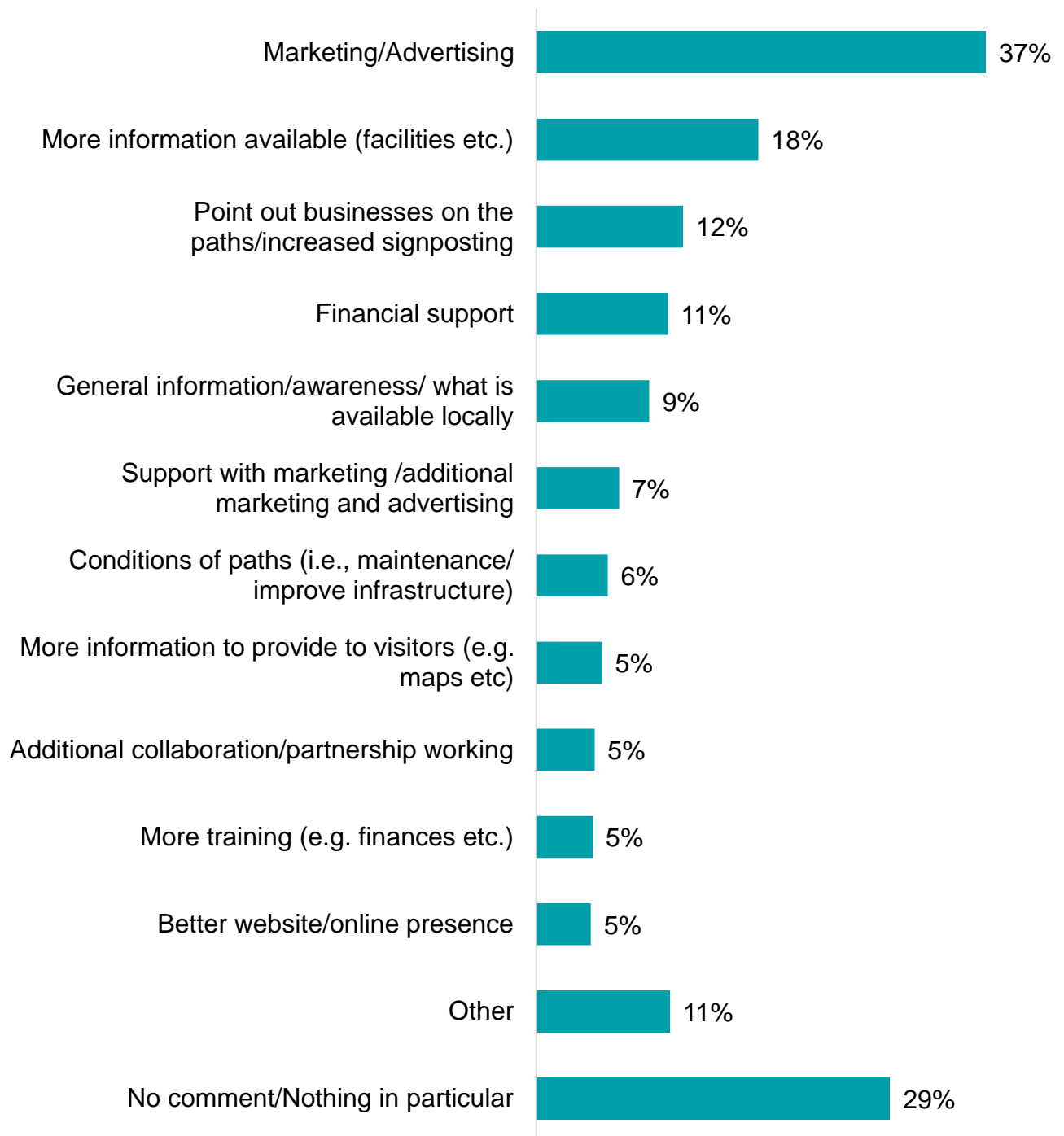
*Bases: All businesses (1013) Q31a. How would you rate each of the following in terms of the support available to businesses/organisations located close to the path/trails or those that may benefit from their existence? Figures below 5% are not shown for neatness.*

## Suggestions for helping businesses gain greater benefit from the routes in the future

Businesses that rated access to financial support or other support as ‘very poor’, ‘poor’ or ‘fair’ were given the opportunity to comment on what they think needs to happen to enable businesses to benefit from the routes in future.

As Figure 40 indicates, the most frequently mentioned theme relates to improved marketing/advertising (37%). In addition, 18% of businesses would like more information to be available on facilities etc. 11% of businesses are also looking for financial support.

Figure 40: Suggestions for helping businesses gain greater benefit from the routes in future



*Base: All businesses who rated access to financial support as very poor, poor or fair (638) Q31b. What else do you think needs to happen to help businesses/organisations benefit more from the Wales Coast Path and/or National Trails?*

**Typical comments from businesses included:**

*“I think it would be beneficial to have someone that comes out to give advice on marketing, financial help, and training, or on the telephone if you need someone to speak to find out what is available.”*

*“More training, more information on the Wales Coast Path, and an ambassador course like the National Parks have - people along the way who are specialists on the path.”*

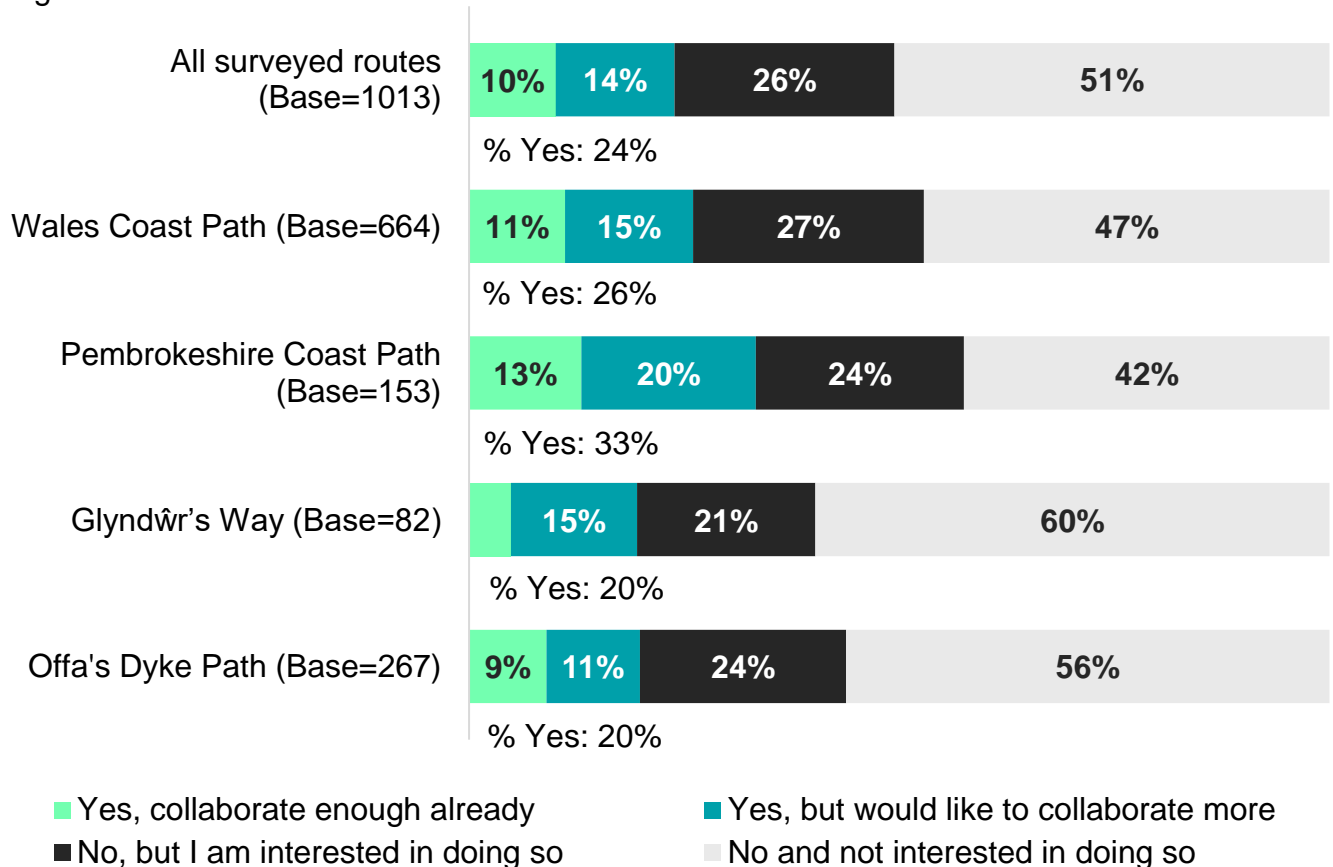
**Collaboration with other businesses**

All businesses were asked to what extent they collaborate (or work in partnership) with other businesses along the routes.

Figure 41 shows that 24% of all businesses already collaborate with other businesses to some extent. 10% feel they collaborate enough; with the remaining 14% stating they would like the opportunity to collaborate more. On average, 77% do not currently work in partnership with other businesses, although, encouragingly, 26% would be interested in doing so in the future.

Businesses assigned to Pembrokeshire Coast Path are significantly more likely than those assigned to all other routes to collaborate. 33% of those assigned to Pembrokeshire Coast Path work in partnership with other businesses. This compares to 20% of businesses assigned to Glyndŵr’s Way or Offa’s Dyke Path.

Figure 41: Collaboration with other businesses





*Base: All businesses (1013) Q26a. To what extent do you collaborate (or work in partnership) with any other businesses along the Wales Coast Path or National Trails? Figures below 5% are not shown for neatness.*

## **Barriers preventing collaboration with other businesses**

All businesses that do not currently collaborate but would like to do so in the future were asked to comment on the barriers or obstacles which prevent them from doing so.

The most common theme relates to a lack of knowledge or awareness about who to collaborate with or how to go about doing so (12% of mentions). This was followed by a lack of time and resources (6% of mentions).

### **A selection of example comments is provided below:**

*“I have no contact with other business. I have owned the B&B since July. I am in young territory. I have no resource to contact others on the trail.”*

*“Just information on what they can offer us, and we can offer them. We do not know enough about what each other does or how we can help each other. We are manufacturing it would be different if we were a restaurant.”*

*“As we are part of the local council, this might limit us. We have to find equal balance between all businesses and can't be seen to be singling out only ones on the coastal path.”*

*“Time and access, that's the only thing. I've got to locate them, then make contact with them and give them a sales pitch.”*

*“It is resources always. The University at the moment is making cuts we are stretched. There are no extra resources for any kind of cross promotion.”*

*“Having the knowledge that they exist. Would be good to know about other B&B's on the route.”*

*Base: All businesses who do not currently collaborate with other businesses but would like to do so in the future (259). Q26b. Are there any particular challenges or obstacles that have prevented your business/organisation from collaborating with other businesses based along the Wales Coast Path or National Trails?*

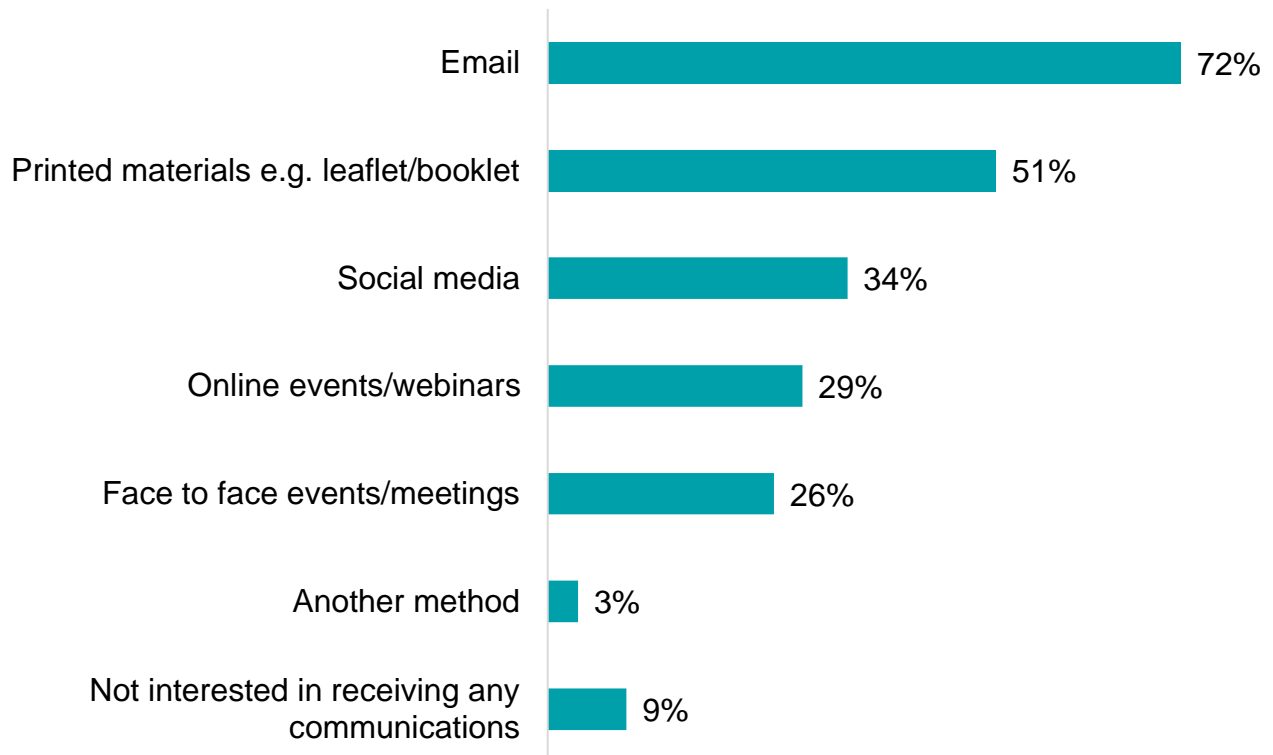
## **Communication preferences**

All businesses were asked how they prefer to receive communications or support from National Resources Wales or other stakeholders.

As Figure 42 shows, 72% of all businesses would prefer to receive communications or support via email. 51% selected printed materials, such as leaflets or booklets.

In addition, over a quarter of businesses are interested in receiving communications or support via online events/webinars (29%) or face-to-face events/meetings (26%). Just 9% of businesses are not interested in receiving any communications at all.

Figure 42: Communication preferences



*Base: All businesses (1013). Q32. How would you prefer to receive communications or support from Natural Resources Wales or other stakeholders regarding the Wales Coast Path and/or National Trails?*

When looking at differences by business sector and assigned route, the results indicate the following:

- Transport, tourism and leisure related businesses are significantly more likely to say that they would prefer to receive communications via social media (46%), online events (41%), and face-to-face events (38%).
- Businesses assigned to Glyndŵr's Way are significantly more likely not to be interested in receiving any communications at all (15%). This compares to just 7% of businesses assigned to the Wales Coast Path.
- Those assigned to the Wales Coast Path are significantly more likely to prefer communication via social media (38%), than those assigned to Offa's Dyke Path and Glyndŵr's Way (both 27%).

## Business toolkits and portal

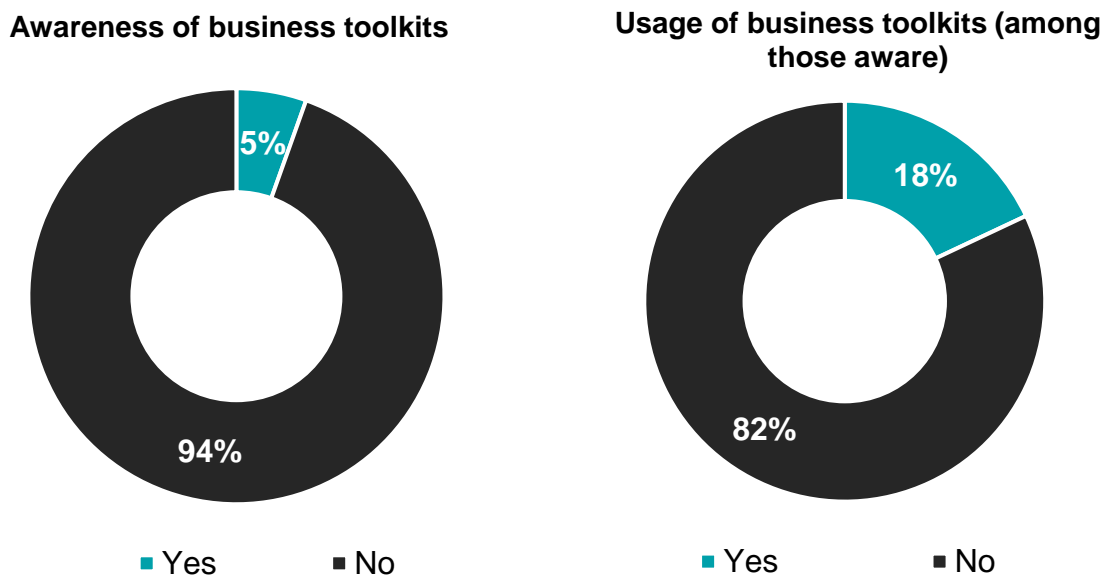
The final section of the report focuses on awareness and usage of the Wales Coast Path and National Trails toolkits. It also explores views on having a dedicated business portal, which would serve as a singular point of access to information for businesses.

### Awareness and usage of Wales Coast Path and National Trail business toolkits

Figure 43 shows that only 5% of businesses are aware that the Wales Coast Path and National Trails toolkits were published last year.

Out of the 55 businesses that are aware, 18% of businesses have used either the Wales Coast Path or National Trails business Toolkits during this time.

Figure 43: Awareness and usage of Business Toolkits



*Base: All businesses (1013). Q23a. Are you aware that the Wales Coast Path and National Trails Toolkits were published last year and contain a suite of useful resources for businesses? All businesses that are aware of the Wales Coast Path and National Trails Toolkits (55). Q2ba. Have you used either the Wales Coast Path or National Trails Business Toolkit over the last year?*

### Interest in a dedicated Wales Coast Path/National Trails business portal

Before answering this question, all businesses were provided with the following contextual information about the dedicated Wales Coast Path/National Trail business portal:

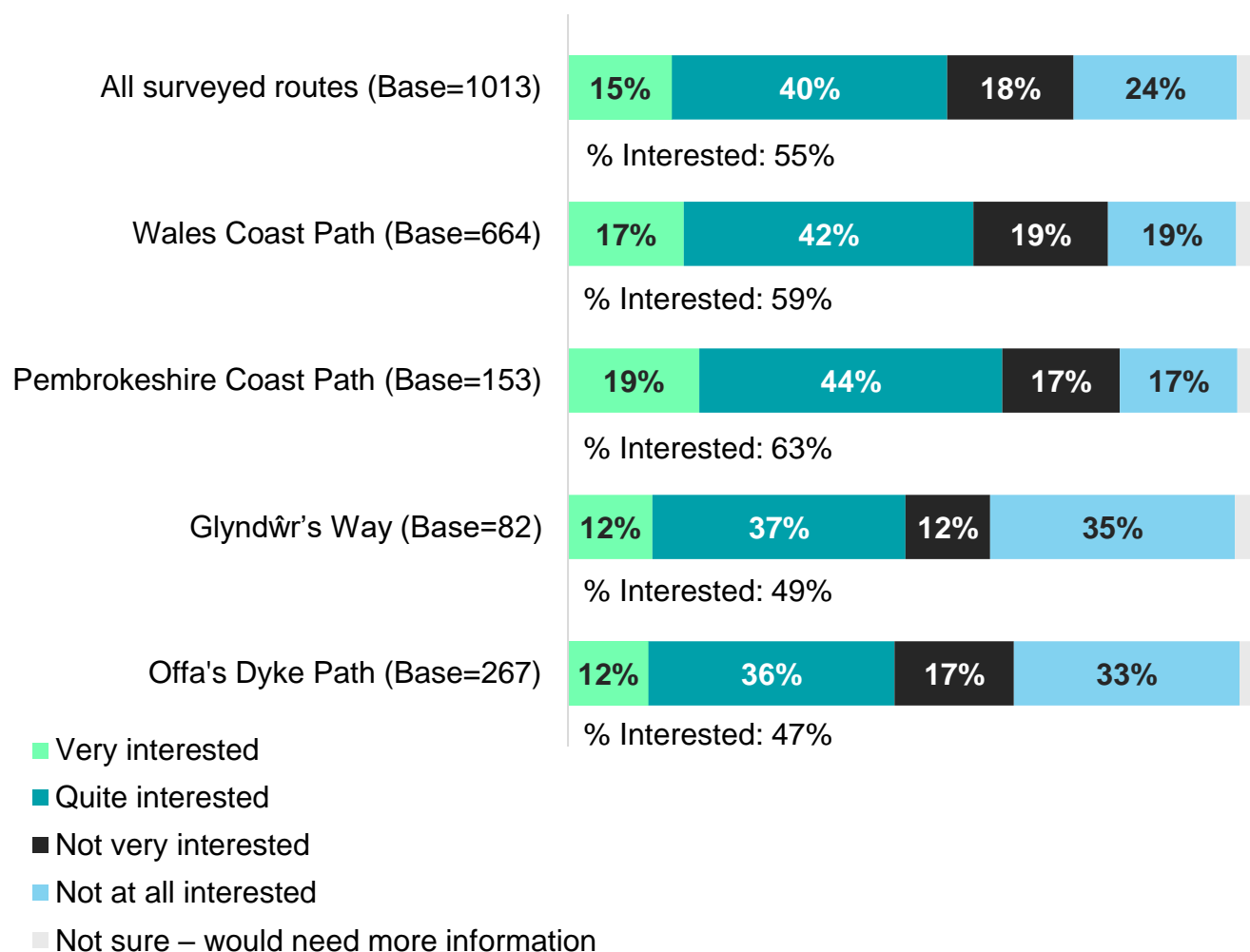
***“Natural Resources Wales (and other stakeholders) are potentially looking to develop a dedicated Wales Coast Path and National Trails Business portal. This will be an internet-based platform that will serve as a singular point of access to***

**information for businesses along both the whole and sections of the Wales Coast Path and National Trails.”**

Encouragingly, 55% of businesses are interested in using the business portal. Interest is highest amongst those in either the accommodation (67%) or hospitality sectors (62%) and lowest amongst retail businesses (50%).

When looking at individual routes (Figure 44), businesses assigned to the Pembrokeshire Coast Path are significantly more likely to be interested in using the business portal (63%) than those for Offa’s Dyke Path (47%) or Glyndŵr’s Way (49%).

Figure 44: Levels of interest in using the business portal



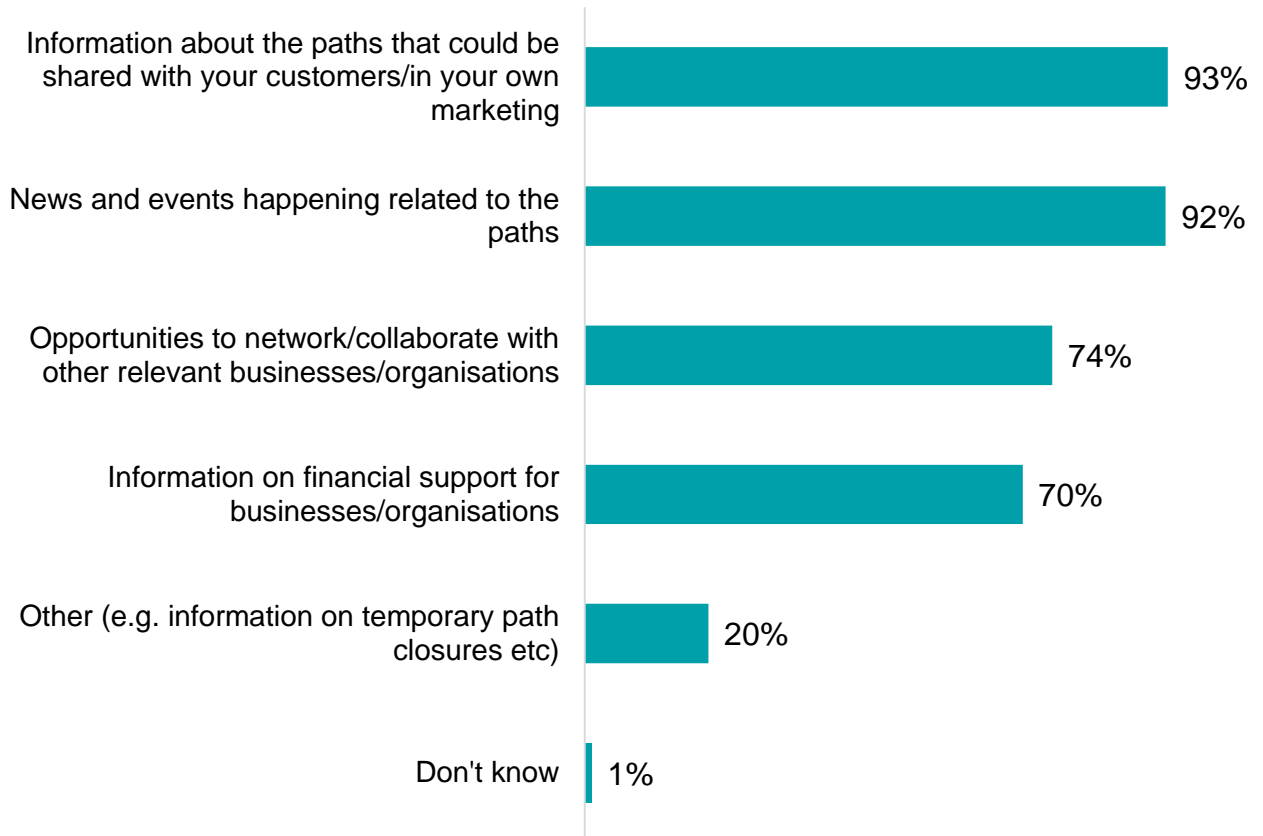
*Base: All businesses (82-1013). Q27. How interested would your business/organisation be in using this business portal? Figures below 5% are not shown for neatness.*

All businesses that expressed an interest in the business portal were asked what kind of information they think would help them run their business.

As Figure 45 indicates, 93% of businesses would like either to see information about the routes that could be shared with their customers or included in their own marketing (93%). This is closely followed by news and events related to the routes (92%).

Encouragingly, 74% of businesses would like the portal to include information on opportunities to network with other relevant businesses.

Figure 45: Information included on the business portal to help support the running or success of businesses



*Base: All businesses that are interested in the business portal (555). Q28. What kind of information would you like to see on the business portal that would help support the running or success of your business/organisation? Figures below 5% are not shown for neatness.*

# Appendix 1: copy of questionnaire

## Survey introduction

Thank you very much for your interest in our Wales Coast Path and National Trails Business Survey.

Natural Resources Wales have commissioned an independent market research agency, DJS Research Ltd, to carry out a short survey of businesses. The survey will help Natural Resources Wales better understand what support businesses/organisations need to take full advantage of their location and the opportunities that the Wales Coast Path and/or National Trails provide.

DJS Research, is an independent market research agency and a Market Research Society partner. As such they operate in accordance with the Market Research Society Code of Conduct, which guarantees confidentiality and there would be no sales resulting from participating in this research. You can find more information about DJS Research's privacy policy at: <https://www.djsresearch.co.uk/about/terms>

Alternatively, you can check their credentials with The Market Research Society by calling 0800 975 9596.

If you have any questions regarding the survey, please contact Clare Rapkins, Senior Research Manager at DJS Research via [WCPandNTBusinessSurvey@djsresearch.com](mailto:WCPandNTBusinessSurvey@djsresearch.com).

If you need to check the legitimacy of this research, please click here for the signed authorisation letter from Natural Resources Wales.

The survey should take around 15-20 minutes.

**A02.****Base: All respondents**

Would you prefer to complete the survey in Welsh or English?

*Choose one*

SINGLE CODE

Code	Answer list
1	Welsh
2	English

## Screening questions

**S01.****Base: All respondents**

Please enter your job title or position within your business or organisation.

This information is just to help us understand which roles within companies we are best speaking to, not to attribute responses to any specific person.

*Write in*

OPEN RESPONSE

Code	Answer list
86	Prefer not to say

**S02a.****Base: All respondents**

Which, if any, of the following paths or trails is your business or organisation located on or close to?

This can include any of your business/organisation premises if you have more than one, and by 'close to' we mean within walking distance or a short drive.

*Select all that apply*

MULTI CODE

Code	Answer list
1	Pembrokeshire Coast Path
2	Wales Coast Path - including any section you are on, such as Anglesey or Ceredigion Coast Path, but <u>not</u> the Pembrokeshire Coast Path
3	Offa's Dyke Path/National Trail
4	Glyndŵr's Way/National Trail
5	None of these

**S02b.****Base: Where located close to at least one path (S02a/1-4)**

Approximately how far away is your nearest site or premises to each of the following...

*Select one for each*

SINGLE GRID

Code	Answer list
1	On the path/trail
2	Within 1-2km/about 1 mile
3	Within 5km /about 2-3 miles
4	Within 10km/about 4-6 miles
5	Within 15km/about 10 miles
6	More than 15km/10 miles
85	Don't know

Code	Statement list
1	Pembrokeshire Coast Path
2	Wales Coast Path (excluding Pembrokeshire Coast Path)
3	Offa's Dyke Path/National Trail
4	Glyndŵr's Way/National Trail
5	None of these

**S03.****Base: All respondents**

Does your business or organisation 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 either path/trail?

*Select all that apply*

MULTI CODE

Code	Answer list
1	Pembrokeshire Coast Path
2	Wales Coast Path (excluding Pembrokeshire Coast Path)
3	Offa's Dyke Path/National Trail
4	Glyndŵr's Way/National Trail
5	None of these

WHERE NOT LOCATED CLOSE TO AND DOES NOT BENEFIT IN ANY WAY FROM EITHER PATH (S02A/5 AND S03/5): THANK & CLOSE



ALL OTHERS CONTINUE

## Importance of each path/trail to the business/organisation

**Q01.**

**Base: Where business thinks they benefit from a path (S03/1-4)**

How does your business/organisation benefit from the <INSERT NAME OF PATH>?

*Write in*

**OPEN RESPONSE FOR EACH SELECTED AT S03/1-4**

Code	Answer list
1	Pembrokeshire Coast Path
2	Wales Coast Path (excluding Pembrokeshire Coast Path)
3	Offa's Dyke Path/National Trail
4	Glyndŵr's Way/National Trail

**Q02.**

**Base: All respondents - for each path they are close to OR benefit from (i.e. selected at S02A OR S03)**

How would you describe the importance of each of the following paths/trails to the success of your business/organisation?

*Select one for each*

**SINGLE GRID**

Code	Answer list
4	Very important
3	Fairly important
2	Not very important
1	It makes no difference whatsoever to my business/organisation
85	Don't know

Code	Statement list
1	Pembrokeshire Coast Path
2	Wales Coast Path (excluding Pembrokeshire Coast Path)
3	Offa's Dyke Path/National Trail
4	Glyndŵr's Way/National Trail

**Q03.**

**Base: All respondents that indicate each path has some importance to their business/organisation Q02/2-4**

Thinking of your business or organisation as a whole, approximately what percentage of your sales or turnover is generated by users of each of the following path/trails or can be attributed to their existence in some way?

*Select one for each*

SINGLE GRID

Code	Answer list
1	0%
2	1-10%
3	11-25%
4	26-50%
5	51-75%
6	76-99%
7	100%
86	Don't know

Code	Statement list
1	Pembrokeshire Coast Path
2	Wales Coast Path (excluding Pembrokeshire Coast Path)
3	Offa's Dyke Path/National Trail
4	Glyndŵr's Way/National Trail

Q04: ASSIGNED PATH:

**Base: All respondents**

BASED ON PATH(S) CHOSEN AT S02a AND/OR S03.

WHERE MORE THAN ONE SELECTED: CHOOSE THE ONE GENERATING HIGHEST % OF INCOME AT Q03. IF %'s ARE EQUAL ASK:

Which of the paths/trails do you think your business/organisation is most reliant on, for example, if it were to close, which would have the greatest impact on your business/organisation?

*Read out. Select one*

SINGLE CODE

Code	Statement list
1	Pembrokeshire Coast Path
2	Wales Coast Path (excluding Pembrokeshire Coast Path)
3	Offa's Dyke Path/National Trail
4	Glyndŵr's Way/National Trail

## Business profile

### Q05a.

**Base: All respondents**

Please describe the main activity or nature of your business/organisation.  
What service(s) does your business provide? What does your business make or do?

*Write in.*

OPEN RESPONSE

### Q05b.

**Base: All respondents**

Which of the following best summarises your main business/organisation's activities?

*Select one*

SINGLE CODE

Code	Answer list
1	Accommodation (including hotels, guesthouses, B&Bs, youth hostels, caravan & camp sites and self-catering accommodation)
2	Hospitality/catering (restaurants, pubs, cafes, etc)
3	Retail (including craft/gift shops, clothing, food/petrol, etc.)
4	Visitor attraction/place to visit/leisure facility (e.g. galleries, sports facility)
5	Transport (e.g. Taxis, coaches)
6	Tourism/leisure related services or activities (e.g. tour/walking guides, booking agent, cycle hire)
7	Manufacturer, producer or supplier of products associated with the path/trails (e.g. printer, construction materials, manufacturer of related souvenirs)
8	Building/construction/repair or maintenance (e.g. fencing, grass cutting, surfacing)
80	Other

**Q06.****Base: All respondents**

Does your business/organisation operate from a single location or premises, or multiple locations or premises?

*Select one*

SINGLE CODE

Code	Answer list
1	A single location/ premises based in Wales
2	A single location/ premises based outside Wales (e.g. England)
3	Multiple - based ONLY in Wales - <i>please provide numbers (if known)</i>
4	Multiple - based in the UK (including Wales) - <i>please provide numbers (if known)</i>

**Q07a.****Base: All respondents**

Including yourself, how many **permanent full and part-time** staff are employed at your business/organisation at this location? **Please exclude any temporary or seasonal workers.**

*Select one for each*

If exact number is unknown, please provide an estimate.

SINGLE GRID

Code	Answer list
0	None
1	1 (only me)
2	2-9
3	10-24
4	25-49
5	50-99
6	100-249
7	More than 250
85	Don't know
86	Prefer not to say

Statement number	Statement
1	Full time (work 30 or more hours per week)
2	Part-time (work less than 30 hours per week)

**Q07b.**

**Base: Where multi-site (Q06/3-4)**

Including yourself, how many **permanent full and part-time** staff are employed by your business/organisation as a whole? **Please exclude any temporary or seasonal workers.**

*Select one for each*

If exact number is unknown, please provide an estimate.

SINGLE GRID. LOGIC CHECK VS. Q7A

Code	Answer list
0	None
1	1 (only me)
2	2-9
3	10-24
4	25-49
5	50-99
6	100-249
7	More than 250
85	Don't know
86	Prefer not to say

Statement number	Statement
1	Full time (work 30 or more hours per week)
2	Part-time (work less than 30 hours per week)

**Q08.**

**Base: All respondents**

Across a year, how many **seasonal or temporary workers** are employed by your business/organisation? **WHERE MULTI SITE (Q06/3-4):** please include all sites or locations close to or that benefit from the Wales Coast Path or National Trails.

*Select one*

If exact number is unknown, please provide an estimate.

## SINGLE CODE

Code	Answer list
1	None
2	1
3	2-4
4	5-9
5	10-24
6	25-49
7	50-99
8	100-249
9	More than 250
85	Don't know
86	Prefer not to say

Statement number	Statement
1	Temporary or seasonal workers

**Q09a****Base: All respondents**

And is your business/organisation open all year?

*Select one*

## SINGLE CODE

Code	Answer list
1	Yes
2	No – only specify months of year you are open, e.g. May to October

**Q09b.****Base: All respondents**

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?

*Select one*

## SINGLE CODE

Code	Answer list
1	Spring
2	Summer
3	Autumn

4	Winter
5	It varies
6	Throughout the year/not seasonal
85	Don't know

## Awareness of <<Assigned Path>> at Q04

INFO 1: Thinking now about <INSERT NAME OF ASSIGNED PATH at Q04>.

### Q010.

**Base: All respondents**

To what extent are you aware of the branding for <INSERT NAME OF ASSIGNED PATH at Q04> or how it's promoted?

*Select one*

SINGLE CODE

Code	Answer list
3	Very aware
2	Somewhat aware
1	Not at all aware
85	Don't know

### Q011.

**Base: All respondents who are aware of the branding for ASSIGNED PATH or how it's promoted? (Q010/2-3)**

How would you describe the branding (i.e. logo) of <INSERT NAME OF ASSIGNED PATH at Q04>?

For example, can you describe the logo, colours, etc, used?

Note that in some cases, materials may be dual-branded, with more than one logo/mention more than one path or trail

*WRITE IN*

OPEN RESPONSE

Code	Answer list
1	Pembrokeshire Coast Path
2	Wales Coast Path (excluding Pembrokeshire Coast Path)
3	Offa's Dyke Path/National Trail
4	Glyndŵr's Way/National Trail

**Q012.****Base: All respondents**

Over the past year, have you seen or heard any publicity, advertising or information about the <INSERT NAME OF ASSIGNED PATH at Q04>?

*Select one*

**SINGLE CODE**

<b>Code</b>	<b>Answer list</b>
1	Yes
2	No
85	Don't know

**Q013.****Base: All respondents who have seen or heard publicity, advertising or information (Q012/1)**

Please can you tell me where or how you have seen publicity, advertising or information for the <INSERT NAME OF ASSIGNED PATH at Q04>?

*Select all that apply*

**MULTI CODE**

<b>Code</b>	<b>Answer list</b>
1	TV
2	Radio
3	Newspaper article
4	Magazine article
5	Leaflet/booklet/poster
6	Destination or area visitor guide
7	Wales Coast Path/Offa's Dyke Path/ Glyndŵr's Way website
8	Any other websites/ Internet
9	Signage
10	At an event
11	Instagram
12	Visit Wales communications/marketing
13	Local Authority communications/ marketing (please specify name of Local Authority)
14	TikTok
15	X (formerly Twitter)



16	Facebook
80	Other (please specify)
85	Don't know

**Q014.**

**Base: All respondents who have seen or heard publicity, advertising or information (Q12/1)**

How would you rate the publicity, advertising or information you have seen or heard about <INSERT NAME OF ASSIGNED PATH at Q04> in the past year, in terms of... ?

*Select one for each*

SINGLE GRID. ROTATE

Code	Answer list
5	Very good
4	Good
3	Fair
2	Poor
1	Very poor
85	Don't know

Code	Statements
1	Frequency
2	Effectiveness in terms of attracting visitors/users to the path/trail
3	Effectiveness in terms of helping or impacting the success of your business/organisation

**Q015.**

**Base: All respondents**

Over the past year, do you recall receiving any direct communications about <INSERT NAME OF ASSIGNED PATH at Q04>?

*Select all that apply*

MULTI CODE. ROTATE

Code	Answer list
1	Newsletter
2	Email(s)
3	Instagram
4	TikTok
5	X (formerly Twitter)

6	Facebook
80	Any other direct communication (please specify)
87	None of these

**Q016.**

**Base: All respondents who recall receiving direct communications (Q15\_1-80)**

How would you rate the direct communications you have received in the past year about <INSERT NAME OF ASSIGNED PATH at Q04>?

*Select one for each*

SINGLE GRID. ROTATE

Code	Answer list
5	Very good
4	Good
3	Fair
2	Poor
1	Very poor
85	Don't know <i>Do not read out</i>

Code	Statements
1	Frequency
2	Effectiveness in terms of attracting visitors/users to the path/trail
3	Effectiveness in terms of helping or impacting the success of your business/organisation

**Q017.**

**Base: All respondents**

Do you mention or promote <INSERT NAME OF ASSIGNED PATH at Q04> in any of your own marketing materials, for example, on your website or social media channels, or when speaking to your customers?

*Select all that apply*

MULTI CODE

Code	Answer list
1	Yes – our <b>marketing specifically mentions</b> <INSERT NAME OF ASSIGNED PATH at Q04>
2	Yes – our marketing mentions a coastal path/trail but does <b>not specifically</b> refer to <INSERT NAME OF ASSIGNED PATH at Q04>

3	Yes, via <b>word of mouth</b> (i.e. speaking to visitors/customers about <INSERT NAME OF ASSIGNED PATH at Q04>)
4	None of these
85	Don't know

**Q018.**

**Base: All respondents who mention their assigned path/trail in their marketing materials (Q017/1 OR 2)**

Which of the following best describes how prominent <INSERT NAME OF ASSIGNED PATH at Q04> is in your marketing?

*Select one*

**SINGLE CODE**

<b>Code</b>	<b>Answer list</b>
1	Main theme
2	Important component
3	Some detail referred to
4	Passing reference

**Q019.**

**Base: All respondents**

Overall, do you think the <INSERT NAME OF ASSIGNED PATH at Q04> is promoted...?

*Select one*

**SINGLE CODE**

<b>Code</b>	<b>Answer list</b>
1	Far too much
2	A little too much
3	About the right amount
4	Not enough
85	Don't know

## Feedback on aspects of <<Assigned Path>>

**Q020.**

**Base: All respondents**

Thinking about <INSERT NAME OF ASSIGNED PATH at Q04>, how would you rate each of the following aspects?

*Select one for each. SINGLE GRID. ROTATE*

Code	Answer list
5	Very good
4	Good
3	Fair
2	Poor
1	Very poor
85	Don't know

Statement number	Statement
1	Signage (e.g. how to get onto the paths, return routes are clear to follow etc)
2	The quality of information provided to path users
3	The maintenance of the path furniture (e.g. bridges, steps, gates, stiles etc)
4	The maintenance of facilities/services provided along the path (e.g. toilets, catering facilities)
5	Access for wheelchair users/those with limited mobility or buggies
6	Public transport provision for travelling around the path (e.g. buses)

**Q021.**

**Base: All respondents**

To what extent do you agree or disagree that each following are needed to encourage more people to visit <<INSERT NAME OF ASSIGNED PATH at Q04>>?

*Select one for each. SINGLE GRID. ROTATE*

Code	Answer list
5	Strongly agree
4	Agree
3	Neither agree nor disagree
2	Disagree
1	Strongly disagree

85	Don't know
----	------------

Statement number	Statement
1	Better public transport provision
2	More/better information on public transport (e.g. timetables)
3	Better road links
4	More/better information on how to access the paths by car (e.g. where to park).

### Q022.

#### Base: All respondents

What improvements (if any) do you think are needed to help more customers/visitors travel around or access the paths?

We are particularly interested in your feedback on transport links/services but also information provision.

*Write in.* OPEN RESPONSE

Code	Answer list
86	No improvements needed
85	Don't know

## Business Toolkits

### Q023a.

#### Base: All respondents

Are you aware that the Wales Coast Path and National Trails Business Toolkits were published last year and contain a suite of useful resources for businesses?

*Select one*

SINGLE CODE

Code	Answer list
1	Yes
2	No
85	Don't know

**Q023b.****Base: All respondents who are aware of the Wales Coast or National Trails Business Toolkit (Q023a/1)**

Have you used either the Wales Coast Path or National Trails Business Toolkit over the last year?

*Select one*

SINGLE CODE

Code	Answer list
1	Yes
2	No
85	Don't know

**Q023c.****Base: All respondents who have used either the Wales Coast Path or National Trails Business Toolkit (Q023b/1)**

Did you do any of the following after consulting either the Wales Coast Path or National Trails Business Toolkit?

*Select all that apply*

MULTI CODE. ROTATE

Code	Answer list
1	Promoted your proximity to the Wales Coast Path
2	Promoted 10 years of the Wales Coast Path in 2022
3	Provided links from your website to local walking itineraries encouraging walkers to visit your business
4	Shared the itineraries on your social media feeds, highlighting how your business can make the experience better
5	Printed local walking itineraries, sharing them with your guests/customers, encouraging them to walk the path offering top local tips
80	Something else ( <i>please specify</i> )
87	None of the above

**Q023d.****Base: All aware of but have not used either the Wales Coast Path or National Trails Business Toolkit (Q023b/2)**

Is there any particular reason why you have not used the Wales Coast Path or the National Trails Business Toolkit?

Write in. OPEN RESPONSE

Code	Answer list
87	No particular reason

**Q023e.**

**Base: All respondents who are unaware of or have not used the Wales Coast Path nor National Trails Business Toolkit (Q023a/2, 85 OR Q023b/2, 85)**

Would you like to receive an online link to the Wales Coast Path Business or National Trails Toolkit?

*Select all that apply*

MULTI CODE

1	Yes – Wales Coast Path Business Toolkit
2	Yes – National Trails Business Toolkit
3	No - neither

## Perceived benefits of assigned path

**Q024a.**

**Base: All respondents**

Do you think the presence of the <INSERT NAME OF ASSIGNED PATH at Q04> has resulted in or contributed to any of the following for your business or organisation?

*Select all that apply*

MULTICODE. ROTATE

Code	Statements
1	The introduction of new products or services
2	Helped secure employment for any of your staff
3	The reason your business/organisation is located where it is
4	Impacted the number of staff you employ, on a permanent or temporary basis
5	Impacted sales or turnover for your business/organisation
6	Impacted the number of customers or visitors to your business/organisation
7	The extension of your opening hours or the times of the year you operate

80	Allowed you to expand or improve your business/organisation in any other way ( <i>please specify</i> )
87	It has made no difference at all

**Q024b.**

**Base: Where each have been impacted at Q024a\_4-6/1**

To what extent has the presence of the <INSERT NAME OF ASSIGNED PATH at Q04> impacted the following:

*Select one for each*

SINGLE GRID

Code	Scale list
1	Increased a lot
2	Increased a little
3	Decreased a little
4	Decreased a lot

Code	Statements
1	The number of staff you employ (on a permanent or temporary basis)
2	Sales or turnover for your business/organisation
3	The number of customers or visitors to your business/organisation

**Q025a.**

**Base: All respondents**

Do you consider that in the future there will be any change in the importance of the <INSERT NAME OF ASSIGNED PATH at Q04> to the success of your business/organisation?

*Select one*

SINGLE CODE

Code	Scale list
1	Will become <b>more</b> important
2	Will become <b>less</b> important
3	No change
85	Don't know



**Q025b.****Base: Where path will become more or less important (Q025a/1-2)**

Why is that?

*Write in.*

OPEN RESPONSE

Code	Answer list
87	No comment

**Collaboration between businesses****Q026a.****Base: All respondents**

To what extent do you collaborate (or work in partnership) with any other businesses along the Wales Coast Path or National Trails? This may include cross/joint marketing and/or promotion of your products and/or services.

*Select one*

SINGLE CODE

Code	Answer list
1	Yes, collaborate enough already
2	Yes, but would like to collaborate more
3	No, but I am interested in doing so
4	No, and not interested in doing so

**Q026b. ,****Base: All respondents who do not currently collaborate with other businesses but would like to do so in the future (Q026a/3)**

Are there any particular challenges or obstacles that have prevented your business/organisation from collaborating with other businesses based along the Wales Coast Path or National Trails?

*Write in.*

OPEN RESPONSE

Code	Answer list
87	No comment/prefer not to say

## Views on dedicated WCP/National Trails business portal

**Q027.**

**Base: All respondents**

Natural Resources Wales (and other stakeholders) are potentially looking to develop a dedicated Wales Coast Path and National Trails Business portal.

This will be an internet-based platform that will serve as a singular point of access to information for businesses along the whole and sections of the Wales Coast Path and National Trails.

How interested would your business/organisation be in using this business portal?

*Select one*

SINGLE CODE

Code	Answer list
1	Very interested
2	Quite interested
3	Not very interested
4	Not at all interested
5	Not sure – would need more information

**Q028.**

**Base: Where interested in business portal (Q027/1-2)**

What kind of information would you like to see on the business portal that would help support the running or success of your business/organisation?

*Select all that apply*

MULTI CODE

Code	Answer list
1	Opportunities to network/collaborate with other relevant businesses/organisations
2	Information about the paths that could be shared with your customers/in your own marketing, e.g. suggested walks or places to visit
3	Information on financial support for businesses/organisations
4	News and events happening related to the paths
80	Other ( <i>Please Specify</i> )
85	Don't know

**Q029.****Base: Where interested in business portal (Q027/1-2)**

If a dedicated business portal was introduced, what benefits do you think this will have for your business/organisation?

*Select all that apply*

MULTI CODE

Code	Answer list
1	Improved collaboration with other businesses along the Wales Coast Path/Trails
2	Provide advice and support
3	Help identify new opportunities for business development
4	Raise awareness of events and marketing campaigns
80	Other ( <i>Please Specify</i> )

**Q030.****Base: All respondents**

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?

*Select all that apply*

MULTI CODE

Code	Answer list
1	Loops and circulars (i.e. routes) for walkers
2	Walking itineraries
3	Information on transport links
4	Areas of outstanding natural beauty (AONBs)
5	Information on accommodation/where to stay
6	Information on parking/car parks close to the path/trail
7	Places of interest to visit (e.g. museums, galleries)
80	Other ( <i>Please Specify</i> )
85	Don't know

## Further opportunities

### Q031a

#### Base: All respondents

How would you rate each of the following in terms of the support available to businesses/organisations located close to the path/trails or those that may benefit from their existence...?

Select one for each

SINGLE GRID

Code	Scale list
1	Very good
2	Good
3	Fair
4	Poor
5	Very poor
85	Don't know

Code	Statements
1	Access to financial support (e.g. grants) to help businesses with investment/business development opportunities
2	Other support for your business or organisation (e.g. help with marketing or training)

### Q031b.

**Base: All respondents who rated access to financial support OR other business support as very poor, poor or fair (Q31a\_1 (4, 5,6) OR Q31a\_2, (4, 5,6)**

What else do you think needs to happen to help businesses/organisations benefit more from the Wales Coast Path and/or the National Trails in the future? This may include additional support or information you think is needed related to marketing, training or financial help for example.

**When providing your response, please outline whether you're referring to the Wales Coast Path/National Trails as a whole or individual paths.**

Write in.

OPEN RESPONSE

Code	Answer list
87	No comment/Nothing in particular

**Q032. (was Q035)****Base: All respondents**

How would you prefer to receive communications or support from Natural Resources Wales or other stakeholders regarding the Wales Coast Path and/or the National Trails?

*Select all that apply*

MULTI CODE. ROTATE

Code	Answer list
1	Email
2	Social media
3	Printed materials, e.g. leaflet/booklet
4	Face-to-face events/meetings
5	Online events/webinars
80	Another method (please specify)
85	Don't know
87	Not interested in receiving any communications

**About your business****C01.****Base: All respondents**

Which one of the following best describes your business or organisation?

*Select one*

SINGLE CODE

Code	Answer list
1	A private sector business
2	A public sector organisation, for example linked to the local authority/council
3	A charity, not for profit organisation or social enterprise
85	Don't know

**C02.****Base: All respondents**

What was the approximate turnover of your business (or sales value) in your last financial year? Please answer in relation to this location only.

**Please be rest assured we are only asking this question to ensure we speak to a good cross section of businesses.**

Select one

SINGLE CODE

Code	Answer list
1	Under £50,000
2	£50,000 to £99,000
3	£100,000 to £200,000
4	£201,000 to £300,000
5	£301,000 to £500,000
6	£501,000 to £750,000
7	£751,000 to £1,000,000
8	Over £1 million
85	Don't know
86	Prefer not to say

**C03.**

**Base: All respondents**

Please can you confirm WHERE SINGLE SITE (Q06/1-2): the postcode of your business/organisation? WHERE MULTI SITE (Q06/3-4): the postcode of the business premises or location that is closest to or benefits most from the <INSERT NAME OF ASSIGNED PATH at Q04>?

The postcode will only be used for analysis purposes.

OPEN RESPONSE

Code	Answer list
85	Don't know/Prefer not to say

**C04.**

**Base: All respondents**

Approximately how long has your business/organisation been operating from this location? (i.e. under its current ownership)

Select one

SINGLE CODE

Code	Answer list
1	Less than one year
2	1-2 years
3	3-5 years
4	6-9 years
5	10-19 years
6	20 years+

85	Don't know
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**C05.**

**Base: All respondents**

DJS Research will be conducting some follow up depth interviews to explore the results of this survey in more detail. Would you be willing to be re-contacted by DJS Research so they can invite you to take part in a depth interview (either by telephone or Teams)?

*Select one*

SINGLE CODE

Code	Answer list
1	Yes
2	No

**C06.**

**Base: All respondents who are happy to be re-contacted to take part in further research (C05/1)**

Can you please confirm your contact details?

*Write in*

OPEN RESPONSE

Code	Answer list
1	Contact name
2	Job Title
3	Organisation name
4	Email
5	Telephone number
86	Refused

**C07a.**

**Base: All respondents who would like to receive an online link to the Wales Coast Path or National Trails Business Toolkit (Q27e/1-2)**

You mentioned that you would like to receive an online link to the Wales Coast Path or National Trails Business Toolkit.

Please note this means that your contact details will be passed back to Natural Resources Wales so they can email the link to you. Rest assured that you will only be contacted by Natural Resources Wales for this purpose.

Select one

SINGLE CODE

Code	Answer list
1	Yes
2	No

**C07b.**

**Base: All respondents**

Are you happy to be added to the mailing list for <INSERT NAME OF ASSIGNED PATH at Q04>? This will allow your business/organisation to be kept up to date with information on upcoming events and news.

Select one

SINGLE CODE

Code	Answer list
1	Yes
2	No

**C07c.**

**Base: Where yes to C07a AND/OR C07b**

Can you please confirm your contact details for this?

Write in

OPEN RESPONSE

Code	Answer list
1	Contact name
2	Job Title
3	Organisation name
4	Email

**C08.**

**Base: All respondents**

Do you have any other comments, suggestions or ideas about the <INSERT NAME OF ASSIGNED PATH at Q04> that you would like Natural Resources Wales to consider in the future?

Write in.

OPEN RESPONSE

Code	Answer list
87	No comment



**C09.**

Finally, we are looking to speak to a wide range of businesses across the Wales Coast Path and National Trails area for this research. Are you able to provide names of any neighbouring businesses or suppliers that may also benefit from their proximity to the Wales Coast Path and/or National Trails?

*Write in*

OPEN RESPONSE.

<b>Code</b>	<b>Answer list</b>
86	Unable to provide any names

INFO: That's all the questions. Thank you for taking the time to complete the survey. Your survey has been successfully submitted. You can now close your web browser.

## Appendix 2: copy of topic guide

<b>(I) Introduction &amp; business profile</b>	<b>5 mins</b>
<p><b>Brief explanation of the purpose of the research</b></p>	<p><i>Moderator to explain the nature of the research.</i></p> <ul style="list-style-type: none"> <li>• I work for a company called DJS Research. We are an independent market research company, and today, we are working on behalf of Natural Resources Wales</li> <li>• Following the survey you recently took part in, our client is looking to understand in a little more detail:               <ul style="list-style-type: none"> <li>○ how your business benefits from the Wales Coast Path/National Trails</li> <li>○ what changes or additional support might be needed to help businesses like yours take full advantage of the visitors that the paths attract and bring more visitors to the path/trails</li> </ul> </li> </ul> <p><i>Moderator to reassure respondents about confidentiality / GDPR compliance</i></p> <ul style="list-style-type: none"> <li>• Feedback will be summarised into a report along with other research; we won't pass names/specific details of who we have spoken to back to our client</li> <li>• There are no right and wrong answers; we are just interested in your views, opinions and ideas.</li> <li>• Brief explanation about audio recording information – we may use anonymised quotes in our report to illustrate the research findings for our client, but these will not be attributed to you personally.</li> </ul>
<p><b>Introduction/profile</b></p>	<p><i>Moderator to invite respondent(s) to introduce themselves;</i></p> <ul style="list-style-type: none"> <li>• If we could start by you telling me a little more about your business               <ul style="list-style-type: none"> <li>○ Where are you located?</li> <li>○ How long have you been there?</li> <li>○ What is your position and who else is involved in running the business?</li> <li>○ What are the main products &amp; services you offer?</li> <li>○ What is it you like best about running your business? And what if anything, do you find particularly challenging?</li> </ul> </li> </ul>
<b>(II) Benefits</b>	<b>10 mins</b>

<p><b>Benefits from the path/trails</b></p>	<p>In the survey, you mention the path/trails you are closest to and/or gain at least some benefit from are...&lt;INSERT FROM SURVEY&gt;</p> <p>Can you tell me more about what difference these paths make to your business?</p> <ul style="list-style-type: none"> <li>• Can you think of any specific examples or how you know your customers/sales have been generated because of the path/trails</li> </ul> <p>In an average week for example, what % of your customers/sales are generated from the paths?</p> <p>Do you benefit from the paths all year round? Or does it fluctuate?</p> <p>What difference would it make if sections of the paths near you closed?</p> <p>Do you think your business takes full advantage of being close to the path/trails and the visitors they attract? What if anything prevents you from doing more?</p> <p>Are there any disadvantages of being close to the paths or from the visitors they generate?</p> <p>Probe on answers to Q24a/b e.g.</p> <ul style="list-style-type: none"> <li>• What new products/services have you introduced &amp; why were they due to the path/trails?</li> <li>• How many new staff have you recruited as a result? What roles?</li> <li>• How have your opening hours changed?</li> </ul>
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<p><b>(III) Perceptions of the path/trails &amp; suggested improvements</b></p>	<p><b>5 mins</b></p>
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	<ul style="list-style-type: none"> <li>• What is your overall impression of the path/trails that your business is close to or benefits from? <ul style="list-style-type: none"> <li>○ Do you think they are well maintained?</li> <li>○ Are they easy for people to access?</li> <li>○ Are they promoted enough?</li> <li>○ Is there enough information about what facilities surround the paths or the places people can visit, eat/stay at, for example?</li> </ul> </li> <li>• If there were just one or two things that could be done to improve the paths to help attract more visitors, what do you think should be done? <ul style="list-style-type: none"> <li>○ What difference would this make to your business?</li> </ul> </li> </ul>
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- How can you make sure that if there are more visitors to the paths, this would have a direct impact on your business?

<b>(IV) Business support</b>	<b>10 mins</b>
	<ul style="list-style-type: none"> <li>• What kind of sources or other organisations do you use to get information or advice for your business, particularly in terms of attracting visitors/users of the path/trails to your business?               <ul style="list-style-type: none"> <li>○ Are you part of any business networking groups, or do you collaborate with other local businesses?</li> <li>○ Do you use any external consultants/organisations to help with things like marketing, your website/social media, or training? If so, how do you find these? Would you prefer to be able to do these activities yourself, and if so, what prevents you?</li> <li>○ How do you find out about any local news or events regarding the path/trails?</li> </ul> </li> <li>• Do you feel you have enough information or support? If not, what kind of information/support do you need more of? And in what format?</li> <li>• What else is needed &amp; from who?</li> <li>• Probe answer from survey provided at Q31 (if not already mentioned)...in the survey you said...&lt; &gt; Can you tell me a little more about what you think is needed and how that would help you?</li> <li>• What else do you think is needed to help attract more visitors to the path/trails and then make sure this has a direct impact on your business?               <ul style="list-style-type: none"> <li>○ If several suggestions are given, which do you think would have the most positive impact?</li> </ul> </li> </ul>
<b>Summary/ round up</b>	<ul style="list-style-type: none"> <li>• Do you have any other comments or feedback that you think would help Natural Resources Wales promote the path/trails or better support businesses like yours?</li> </ul>

## Appendix 3: case studies

The case studies below help to demonstrate the benefit of the routes on businesses. They also highlight additional support needs and/or recommendations on what could be improved to ensure businesses benefit as much as possible from the routes.

### Case Study 1: Village shop situated close to Glyndŵr's Way National Trail

This small, family-run village shop close to Glyndŵr's Way National Trail has been serving the local community for 15 years. It is owned by a couple who moved from Hampshire to Wales. The shop sells essential food items and homemade takeaway food (e.g. freshly made sandwiches, cakes, and hot meals). It also has a small, dual-purpose fuel pump which provides fuel to residents, walkers, cyclists, and tourists.

*"We saw the need to create more for the community and visitors, so we've slowly built it up over the years. The shop is particularly crucial to Glyndŵr's Way visitors, as it's one of the only places nearby where they can stock up on food and fuel along the route."*

The shop benefits from its close proximity to Glyndŵr's Way. It is located only about 200 yards from the trail. The shop is also listed on the Glyndŵr's Way website as a resource for walkers.

Despite the village's small size, the shop thrives on the seasonal influx of walkers, mountain bikers, and cycling event participants. They are all drawn to the area due to the beautiful scenery and nearby attractions (such as Lake Vyrnwy). The lack of nearby B&Bs has also brought in more walkers, who now rely on the shop to stock up on essential items such as tea, coffee, bacon baps, and protein snacks.

Reflecting on the trail's value, the shop owner commented that *"Walkers on the path are a great boost to the shop during the summer season."* For example, during the peak summer months, tourist sales account for 80-85% of the shop's business, with daily sales often reaching £700-£1,000, compared to much lower Winter figures.

Although the shop's proximity to Glyndŵr's Way is hugely beneficial to the shop, a number of improvements are needed to help maximise the shop's future success. As demonstrated below, these relate to trail maintenance/accessibility, marketing/promotion, and increased support/collaboration between local businesses (also echoed in the quantitative survey findings):

**Improved route maintenance and accessibility.** Sections of the trail surrounding the shop (such as Lake Vyrnwy) are in poor condition, with muddy, impassable stretches. This means that people with wheelchairs, buggies and bikers often struggle to get around the routes easily.

**Increased signage and better promotion of the routes.** Due to a lack of signage on some stretches of the trail, customers often go into the shop to ask for directions (as they are unaware it is right in front of them). The shop owner also highlighted that the current online resources and social media presence are limited. The shop owner feels that better promotion of the routes will help to increase footfall and therefore will benefit local businesses.

*“There’s barely any posting; just one or two posts a month. It’s hard to promote the path/trail when there’s no real engagement or information flow from official sources.”*

**Greater collaboration and/or community engagement is needed:** Although the shop uses social media platforms such as Instagram, TikTok, and Facebook to promote itself, additional support from local councils, trail associations, or tourist boards could help raise awareness of the National Trails. Again, this could potentially have a positive financial impact on businesses located in close proximity to the routes.

**More up-to-date Information available for customers:** The trail’s website needs updating as some businesses (such as accommodation providers) are still listed but they no longer exist as demonstrated by the following comment: *“Some of the B&Bs listed have closed years ago. It’s no good if walkers can’t rely on this information.”* An updated, user-friendly website would allow walkers to better plan their journeys and find open businesses along the trail.

In summary, Glyndŵr’s Way contributes valuable footfall to this village shop, especially during the peak summer months. However, the shop owner has identified a number of areas where improvements are needed to help increase footfall (and therefore potentially increase its future sales). These include: Improved signage, better trail maintenance, greater promotion & marketing of the trails and more accurate information on websites etc.

## **Case Study 2: Accommodation and hospitality business situated close to both Offa’s Dyke Path and Glyndŵr’s Way National Trails**

This business is a village pub with accommodation situated in Knighton, Powys, Mid Wales. The pub is situated equal distance between Offa’s Dyke Path and Glyndŵr’s Way National Trails. The pub is managed by a gentleman who previously worked in the building industry but wanted a career change. Acquiring the pub last July, the pub owner has worked tirelessly to adapt to the unique demands of running a business in the accommodation and hospitality sectors. Whilst the gentleman is enjoying running his pub, he also recognises it has been a steep learning curve for him.

The pub is a seasonal business. It is typically busiest during the walking season from April to October. The pub and guest house relies heavily on passing trade, with over 75% of its sales and turnover coming from walkers on the nearby trails including Offa’s Dyke Path and Glyndŵr’s Way. Both National Trails are considered to be lifelines for his business as demonstrated by the following quote:

*“Over 75% (it might be 80-85%) of our business are walkers. We would shut down tomorrow without walkers, no ifs or buts. We would be finished.”*

Despite trail customers providing a steady income for the pub, the owner highlighted challenges with the unpredictable nature of his business. He highlighted that the pub/B&B is very dependent on visitor numbers, which means it can be fully booked one day but quiet the next. This in turn makes planning stock levels and staffing levels problematic for him.

Whilst the owner is currently investigating ways to expand his customer base himself (such as increased advertising, investing in an online booking system etc), he feels that his

business would also benefit from additional support to help him run his business more effectively:

*“I don’t really get any advice or know where to seek it. When I bought the place, I had a week with the original owner to learn the basics, and that’s been my only source of guidance. Beyond that, there hasn’t been much support.”*

*“The Offa’s Dyke Centre is about 300 yards away, and I know a few people there. I do advertise with them, but since it’s volunteer-run and not staffed by professionals, it’s not open consistently, so I don’t really get advice from them.”*

### **Case Study 3: Tourist Information Centre situated close to Wales Coast Path & Offa’s Dyke Path**

The Tourist Information Centre is located in North Wales. It is the first point of call for those starting their walk on the Wales Coast Path from north to south or the final destination for walkers heading in the opposite direction. It caters for tourists visiting both Offa's Dyke Path National Trail and the Wales Coast Path.

It has been operating in its current building for nearly 30 years, but it has been providing services to the local area since 1956.

The centre plays a vital role in local tourism, providing essential information and resources for path walkers, cyclists and other customers.

Due to its close proximity to the Wales Coast Path and Offa’s Dyke Path, the centre experiences a substantial footfall for customers needing resources, guidebooks, or simply a chat about the local area. This interaction is one of the highlights for staff, as demonstrated by the following quote:

*“Meeting people is the best part of the job – visitors come from all walks of life, some from just a short drive away, others from overseas. It’s always interesting, and honestly, people are in good spirits. They are here to enjoy themselves, so we get the best of them.”*

The centre has noticed a distinct difference in how each walking route attracts and serves customers. Offa’s Dyke Path walkers are often dedicated to completing the entire trail, either beginning or finishing at the centre. In contrast, Wales Coast Path customers are more casual – it’s a different crowd. Some might just do a section for a day out, while others are planning to cover it in stages. It also tends to bring in more people. As a result, the centre finds itself catering for a mix of tourists and hikers, some preparing for a challenging journey and others looking for a more relaxed experience.

The Wales Coast Path, in particular, contributes directly to the centre’s income, as tourists are more likely to purchase guidebooks and other materials for shorter, more accessible sections of the path.

*“There is a financial benefit for us from Wales Coast Path visitors - they will buy guidebooks [and souvenirs].”*

Despite the benefits, the centre faces challenges due to its location.

One common seasonal issue is sand accumulation on the Wales Coast Path, especially after storms. This affects not only walkers but also cyclists requiring accessible/clear paths. The centre highlighted that they often receive complaints, especially from cyclists and wheelchair users, when sand covers the path after a storm. Whilst staff recognise that such issues are part of the coastal environment, they think a quicker response from NRW/other stakeholders about rectifying the issue would be beneficial.

Another potential improvement is improved signage and greater promotion of the routes as the centre feels both of these are currently limited (particularly for Offa's Dyke Path). The respondent recommended increasing advertising/promotion at major starting or ending points, such as Prestatyn High Street. This is reflected in the following comment:

*"If you're on Prestatyn High Street, you might not even know Offa's Dyke starts here. There's not much beyond studs in the pavement, which isn't enough for people unfamiliar with the area. It's easy to miss – there's nothing obvious, no big marker that says, 'this is where it begins or ends.'"*

Finally, the centre representative suggested introducing 'Ambassador' training courses for smaller or less well-established businesses. The respondent highlighted that the Ambassador Wales courses are excellent (as they cover the history of the area etc), but the course doesn't cover anything specific about the routes. The respondent feels that if the course covered this topic, it would help businesses learn more about stretches of the route, so they are better equipped to answer more detailed questions. This would help enhance the visitor experience for tourists and ultimately increase footfall and/or repeat visits.

In summary, the centre values its position on these routes and recognises the unique opportunities they bring. Enhanced training, improved signage and promotion could further strengthen its positive impact, ensuring that this essential tourism hub continues to flourish as a welcoming gateway to Wales's renowned trails.

#### **Case Study 4: Small family-run hotel located on the Pembrokeshire Coast Path**

This family-owned hotel in Pembrokeshire has been welcoming guests since 1972. Set along the scenic Pembrokeshire Coast Path, it combines classic hospitality with modern touches. The hotel has 11 bedrooms and five self-catering cottages (one fully off-grid).

The Pembrokeshire Coast Path is crucial to the hotel's business, particularly in the Autumn/Winter months when traditional tourism slows. The path brings in walkers and nature enthusiasts drawn to Pembrokeshire's natural beauty, and many guests visit specifically to explore the nearby islands, like Skomer and Ramsey.

*"We're busy enough in Summer, but the path keeps people coming when it's quieter, filling in the gaps."*

While the path contributes greatly to the business, the owner highlighted a number of challenges:

**Availability of local amenities:** Recently, the Council has closed the public toilets near popular sections of the routes which is causing issues for customers. The hotel owner suggested that the Welsh Tourist Board should help fund essential amenities (including



public toilets) to help improve the visitor experience.

**Limited public transport and infrastructure:** Currently, there are limited public transport options available, as the Puffin Bus only runs twice a day for half the year. This impacts accessibility/ease of travelling around the Path, particularly during the Winter months.

**Increased promotion during off-peak season:** Encouraging more customers during the quieter months is essential for the hotel's viability. The hotel owner suggested promoting the coast path for Winter and Autumn visits by leveraging the appeal of "storm-watching weekends" and/or promoting the "roaring fire, a cup of tea, and cake" experience that could help boost future customer numbers.

In summary, the Pembrokeshire Coast Path is integral to this hotel's success, enriching the area and supporting rural tourism in all seasons. While the path is a powerful draw for tourists, improvements (such as enhanced local amenities, better public transport, and targeted promotion) could further strengthen the area's appeal and bolster year-round tourism.

### **Case Study 5: Fast food restaurant situated on the Wales Coast Path**

This long-standing, family-run fast-food restaurant located in North Wales has been part of the local community since 1991. Managed by a new generation of family owners, the restaurant is a popular choice amongst locals and visitors. Located near the Wales Coast Path, the business benefits from seasonal tourist footfall, especially during the Summer months, with many customers stopping by as they explore the nearby trails and attractions.

Following the pandemic, the restaurant experienced an increase in customers as tourists opted to visit North Wales instead of travelling abroad for holidays. Whilst this shift has helped sustain business during the peak season, trade remains slow during the Autumn/Winter months:

*"We're busy in the Summer, but Autumn is especially quiet, even though retired visitors are still travelling."*

Whilst proximity to the path helps to generate some business, the business owner feels the benefit is less than it could be. This is mainly due to the limited information and advertising available to customers. The business owner highlighted that many tourists are unaware of the Wales Coast Path until they arrive. Therefore, the owner regularly provides customers with information on things to do, etc.

Whilst the proximity to the Wales Coast Path is beneficial, the business owner identified several areas where additional support could increase the benefit of the path going forward:

**Increased marketing and promotion:** The respondent suggested Natural Resources Wales and/or local councils could work together to create engaging digital marketing materials (such as an app or website) to help promote the path to potential customers.

*"An app or a well-designed website where visitors can instantly see what's on offer in the area would be fantastic."*

**Professional marketing support and training:** Many local businesses lack the resources or expertise to effectively market or promote themselves. Therefore, the restaurant owner suggested a need to offer marketing workshops or practical support if businesses needed it.

**Improving public transport:** The owner highlighted that travelling around the path can be a challenge for customers without cars. Therefore, potentially improving public transport provision/links could help increase footfall numbers all year round.

**Improved communication and networking opportunities:** Operating as an independent business can be isolating. The owner highlighted a need for regular meetings to allow local business owners to meet up and share ideas to help boost customer numbers. This is demonstrated in the following comment:

*“ Having a network meeting every six months would allow us to discuss challenges and improve services together. I believe that a collaborative forum would help strengthen the business community and benefit visitors.”*

**More local festivals and events:** The owner recommended hosting more festivals and events (such as food festivals) to help boost customer numbers and expenditure in future.

While the Wales Coast Path provides a seasonal boost to the business, there is potential to do more if Natural Resources Wales and local authorities take steps to improve marketing support, public transport, and community collaboration in the near future.

### **Case Study 6: Accommodation business near Offa’s Dyke Path and Glyndŵr’s Way**

An independent accommodation business situated close to both Offa’s Dyke Path and Glyndŵr’s Way relies heavily on walkers and tourists. The business’s location is ideal for walkers; with Offa’s Dyke path passing directly through the village and Glyndŵr’s Way only a short distance away. This makes it a convenient resting point for travellers, some of whom break up their walk into stages, using the nearby train station to return for the second half of the route.

Walkers and tourists visiting in the peak season (between April and October) account for around 75% of the business’s revenue. These customer groups are the lifeblood of the business, as demonstrated by the following quote:

*“We would shut down tomorrow without the walkers; over 75% of our business depends on them. Walkers also come from a wide range of locations, including Australia, Canada, and across Europe.”*

Despite this, occupancy rates can sometimes be unpredictable, with some days fully booked and others quiet. To help ensure customer numbers are consistent, the business owner has the following suggestions:

**Enhanced marketing and digital support:** The business owner expressed a need for professional support in digital marketing. Although already listed on walking sites and benefiting from repeat bookings, the business lacks a strong digital presence and website with direct booking capabilities.

**Collaborative networking and support groups:** The business owner highlighted that running a small business can be a challenge. He would, therefore, benefit from collaboration and networking opportunities with other small/similar businesses in the local area. He felt this would be a good way of sharing insights, discussing common issues, and collectively improving the customer experience more widely.

**Increased marketing and promotion of the routes:** While popular amongst dedicated walkers, the trails are less well known amongst casual visitors. The owner suggested promoting the trails through televised walking programmes, social media features or events to help increase footfall. For example, the business owner referenced a recent visit by a well-known presenter who walked part of the trail. He feels that having this national exposure on TV would help to increase awareness and encourage more future customers.

**Hosting more events/activities:** Finally, the business owner suggested hosting group walks, guided tours, food festivals, or local markets, etc, to help attract a steady stream of customers all year round rather than just during the peak season.

*“Events bring people from all over and give them a reason to experience this part of Wales.”*

In summary, the business’s proximity to both Offa’s Dyke Path and Glyndŵr’s Way is integral to this business’ success as it provides a consistent revenue stream. However, additional support in digital marketing, networking, and increased trail visibility could boost these benefits even further.

### **Case Study 7: Bookshop based near Pembrokeshire Coast Path**

This independent bookshop is co-owned and operated by a small team. It has been established for over 15 years in Fishguard. Located close to the Pembrokeshire Coast Path, the business attracts both local residents and customers. Whilst the shop is open all year round, it is particularly busy during the school holidays and summer months. Whilst it is challenging to estimate exact percentages, the shop’s proximity to the Pembrokeshire Coast Path is considered to be very beneficial to the business, drawing customers from all over Wales and beyond.

While the business benefits from its location, the owner identifies several areas where increased support and resources could help increase customer numbers and/or turnover:

**Increased digital/social media presence:** Currently, the bookshop has a limited digital/social media presence. Whilst, the business is already listed in a seasonal local guide, the bookshop owner would like some support with setting up an e-commerce website to increase its customer base (particularly during the quieter months).

**Improved communication (in relation to path news/events):** The business owner mentioned that she often finds out about local events informally (mainly through word-of-mouth). To aid business planning, the bookshop owner suggested a need for a more centralised resource where frequent updates on path news/events could be posted. This would allow small businesses to plan their stock levels and open times accordingly.

**Improve availability/accessibility of public transport:** The owner highlighted the importance of the shuttle buses that serve the coast, especially for tourists without cars.

However, these buses have been less reliable in recent years, mainly due to driver shortages. The owner highlighted a need to improve the reliability and frequency of the service to help improve the visitor experience.

**Increased promotion of other nearby paths and trails:** Finally, while the Pembrokeshire Coast Path draws a steady flow of customers, the bookshop owner suggested a need to raise awareness of nearby routes too. This may help attract more repeat customers, which may be beneficial to the local economy.

In summary, the Pembrokeshire Coast Path is a vital asset for this business, particularly during the school holidays and other peak periods. However, the bookshop owner suggested some improvements to help her business gain further benefit from the Pembrokeshire Coast Path. These include improved public transport provision, improved communication (particularly related to path news/events) and greater promotion of other nearby walking routes.