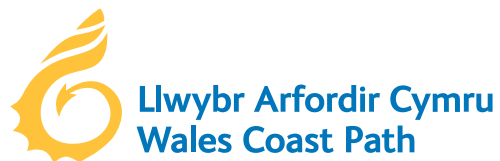# Wales Coast Path –
Gwynedd
Business Survey 2024

Julie Hollingsworth, Associate Director
jhollingsworth@djsresearch.com

Clare Rapkins, Senior Research Manager
crapkins@djsresearch.com

Emily Ward, Senior Research Executive
eward@djsresearch.com

Llwybr Arfordir Cymru
Wales Coast Path

Cyfoeth Naturiol Cymru
Natural Resources Wales

djs research

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Llwybr Arfordir Cymru
Wales Coast Path

Background and Methodology

The primary aim of this survey is to enhance Natural Resources Wales' and other stakeholders' understanding of the support required by businesses to fully leverage their location and the opportunities presented by Wales' long-distance routes, namely the Wales Coast Path (including the Pembrokeshire Coast Path), Offa's Dyke Path National Trail and Glyndŵr's Way National Trail.

Overall, the objectives relate to all long-distance routes, however, this report specifically focuses on the benefit of the **Wales Coast Path in Gwynedd**.

The key objectives include:

- Identifying the types of businesses operating on or near the routes.

- Understanding the services provided by businesses in proximity to the routes.

- Assessing the benefits the routes bring to businesses, encompassing both direct and indirect income generated throughout different seasons.

- Evaluating the level of collaboration among businesses along the routes.

- Soliciting opinions on issues such as public transport availability, visibility, accessibility, signage, marketing, support, and any challenges or barriers related to the routes.

- Exploring interest and support for establishing a dedicated Wales Coast Path Business Portal.

- Facilitating comparison with previous surveys conducted on the same subject matter where possible or relevant.

This survey was conducted via CATI (Computer Assisted Telephone Interviewing). To ensure inclusivity and accessibility of the survey, an online option was also provided.

To qualify for the survey businesses had to either consider themselves close to one of the long-distance routes (within walking distance or a short drive) or state their business benefits from one of the routes in some way.

Overall, just over a thousand businesses were surveyed, of which **147 are located in Gwynedd** and were assigned to the Wales Coast Path, based on that being their closest route or the one which they derived the most benefit from. This report focuses on these businesses only.

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

A guide to this report

Rounding

Results are presented in this report as whole numbers for ease of reading and interpretation. Rounding is performed at the last stage of the calculation for maximum accuracy. Therefore, where results are presented as % positive, % neutral or % negative, there may be instances where the results do not total 100%. The differences should never vary by +/-1% point.

Base sizes

Please note, the base sizes included are the total number of people who responded to a particular question. As not everyone answered all questions, the base for individual questions may be lower than the total number of respondents who responded to the survey, are located in Gwynedd and were assigned to the Wales Coast Path (147).

Definition of 'Assigned' path

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 path and asked to respond to the remaining survey questions based on their 'assigned' path. In instances where businesses were located close to or benefitted from more than one path/trail, they were assigned to the one which either a) generated the highest proportion of sales/turnover or b) they are most reliant on for their business.

Comparison to 'total' values

In this report, results for those based in Gwynedd and assigned to the Wales Coast Path are compared to the average figures from the total sample of businesses assigned to the Wales Coast Path, regardless of business location. The combined average is labeled as "Wales Coast Path (total)" in the comparison charts. Where figures are significantly higher than the total for the Wales Coast Path nationally, a coloured arrow in the chart will show whether this is significantly higher or lower. If there is no arrow, this figure is not significantly different to the total and should be treated with some caution. Where large differences are deemed insignificant, it is likely due to the differing base size of the two samples.
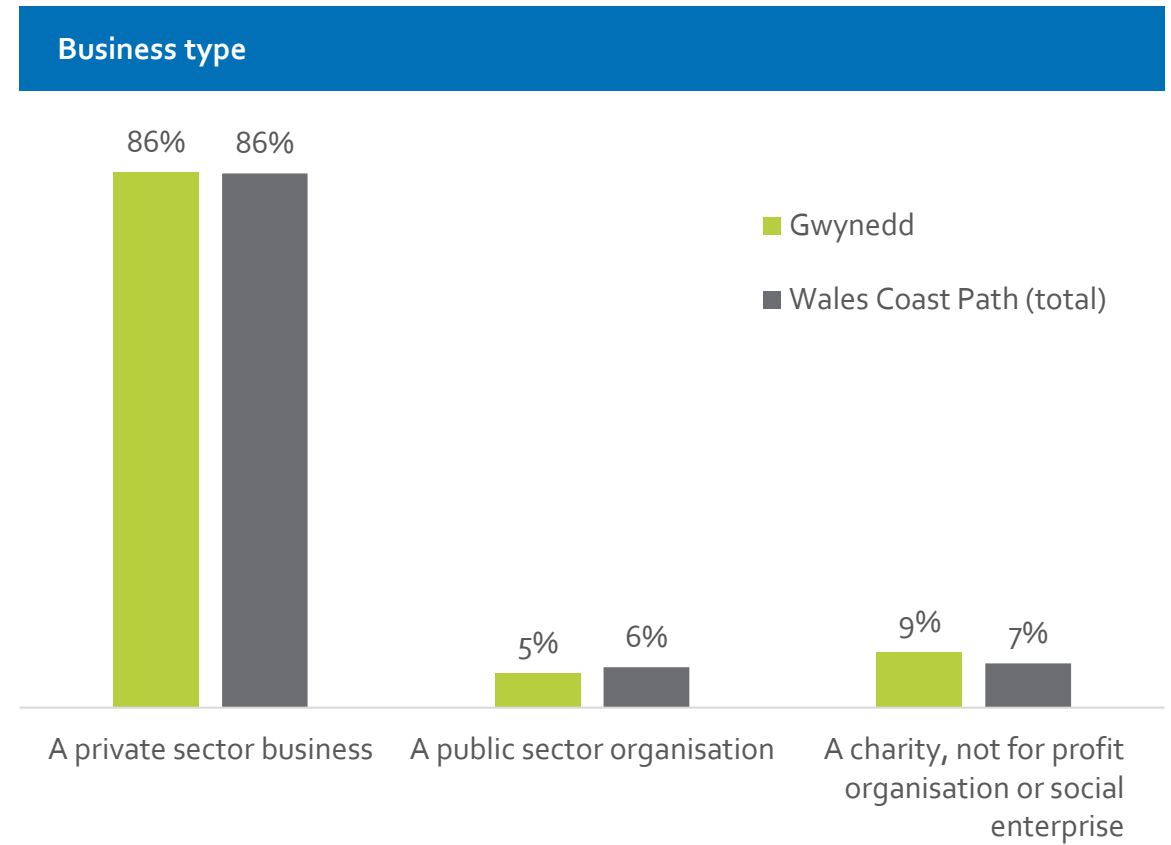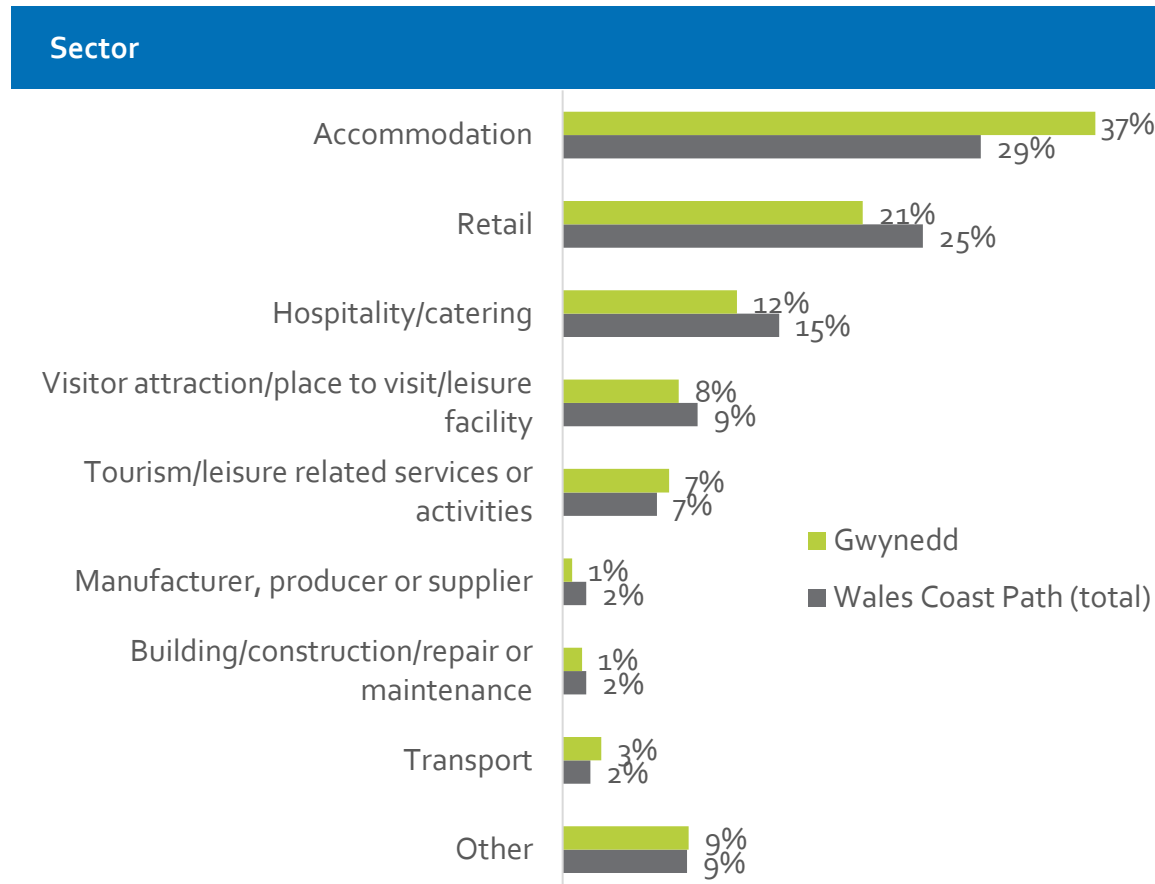
Please note – the Pembrokeshire Coast Path is classified as a National Trail but also forms part of the Wales Coast Path. Throughout this report, when referring to the Wales Coast Path (total), we are referencing the Wales Coast Path including the Pembrokeshire Coast Path.

Wales Coast Path - Gwynedd
Business Profiles

Llwybr Arfordir Cymru
Wales Coast Path

Business profiles

The 147 businesses in the Gwynedd region represented a range of sectors, with 58% in the accommodation or retail sectors. A further 12% work in the hospitality and catering sector. Overall, 86% of businesses are in the private sector.
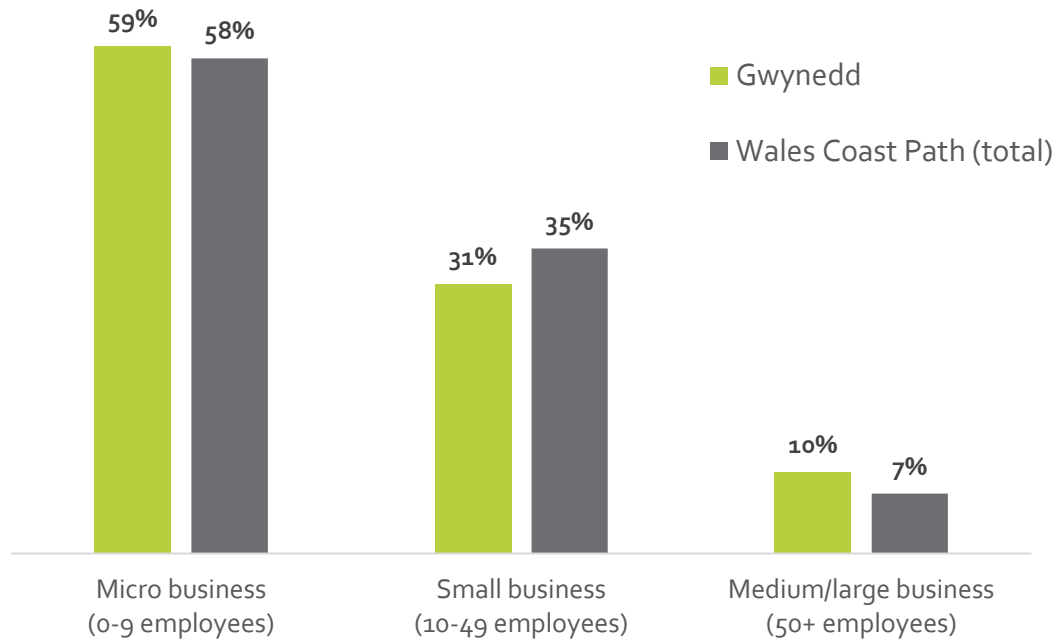
Sector

Sector	Gwynedd	Wales Coast Path (total)
Accommodation	37%	29%
Retail	21%	25%
Hospitality/catering	12%	15%
Visitor attraction/place to visit/leisure facility	8%	9%
Tourism/leisure related services or activities	7%	7%
Manufacturer, producer or supplier	1%	2%
Building/construction/repair or maintenance	1%	2%
Transport	3%	2%
Other	9%	9%

Business type

Business type	Gwynedd	Wales Coast Path (total)
A private sector business	86%	86%
A public sector organisation	5%	6%
A charity, not for profit organisation or social enterprise	9%	7%

Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the Gwynedd visitor region (and also assigned to Wales Coast Path)(147) . **Q05B.** Which of the following best summarises your main business/organisation's activities? **C01.** Which one of the following best describes your business or organisation?
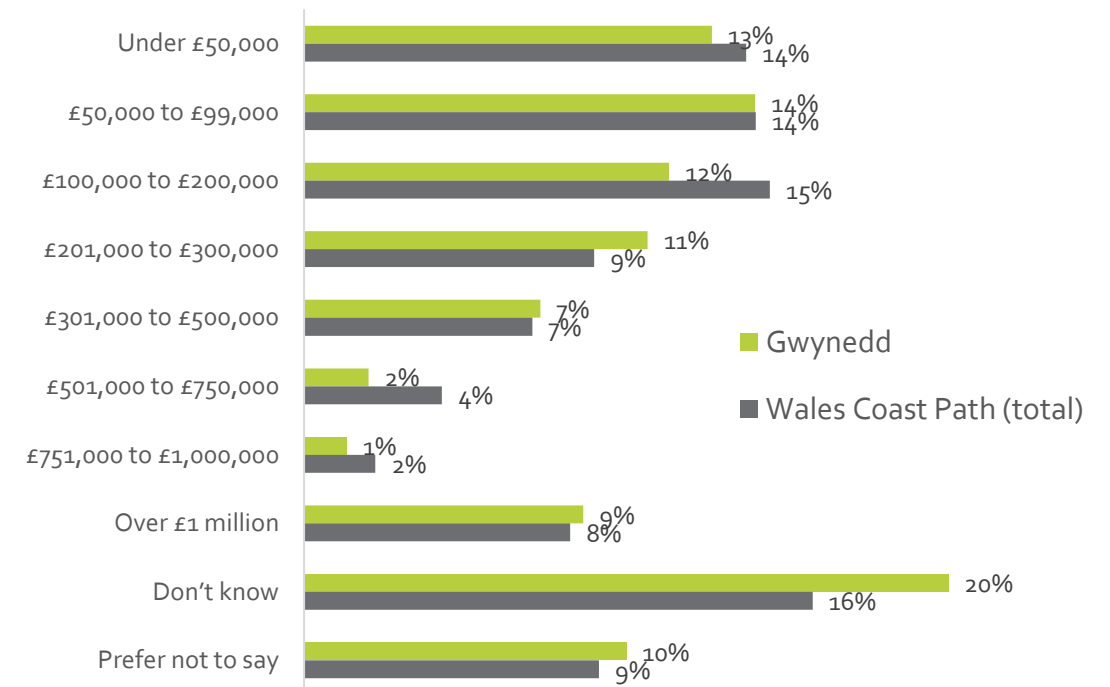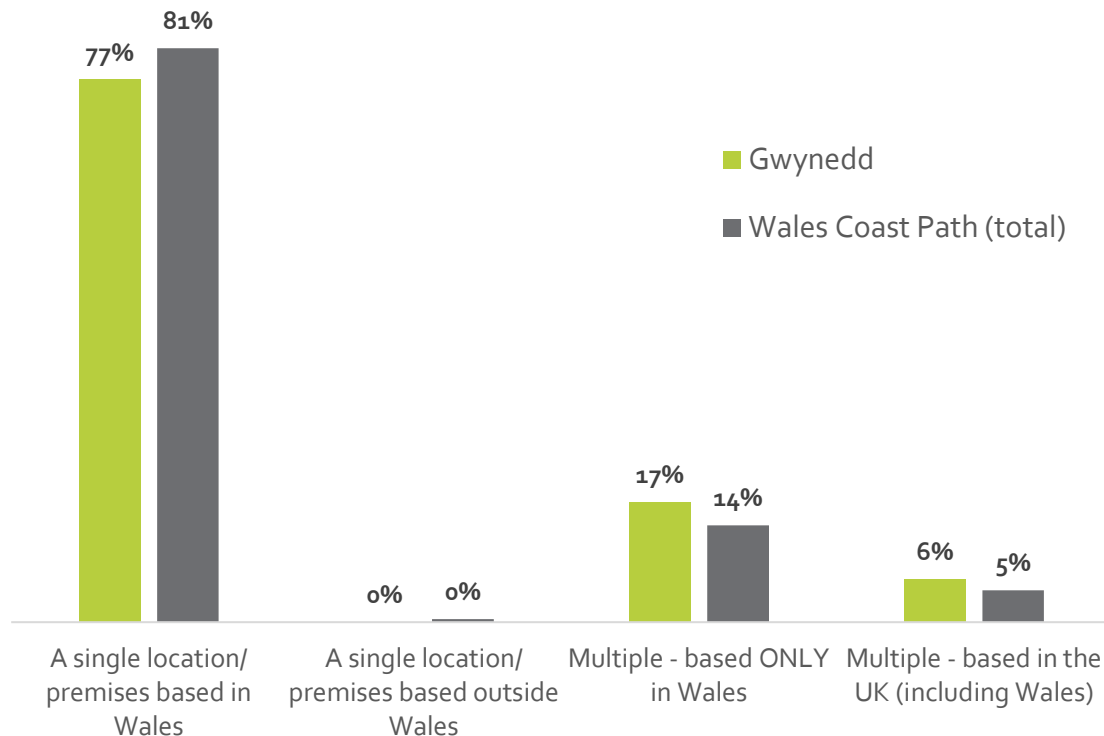
Business credentials

Most of the businesses in Gwynedd employ less than 50 staff members (90%). Micro businesses with a workforce of 0-9 employees make up 59% of businesses in Gwynedd. Another third are small businesses with 10-49 employees (31%). Moreover, 50% of businesses have a turnover of £300,000 or less. Only 9% have a turnover over £1 million.

Business size

- Gwynedd
- Wales Coast Path (total)

Business size	Gwynedd	Wales Coast Path (total)
Micro business (0-9 employees)	59%	58%
Small business (10-49 employees)	31%	35%
Medium/large business (50+ employees)	10%	7%

Turnover

- Gwynedd
- Wales Coast Path (total)

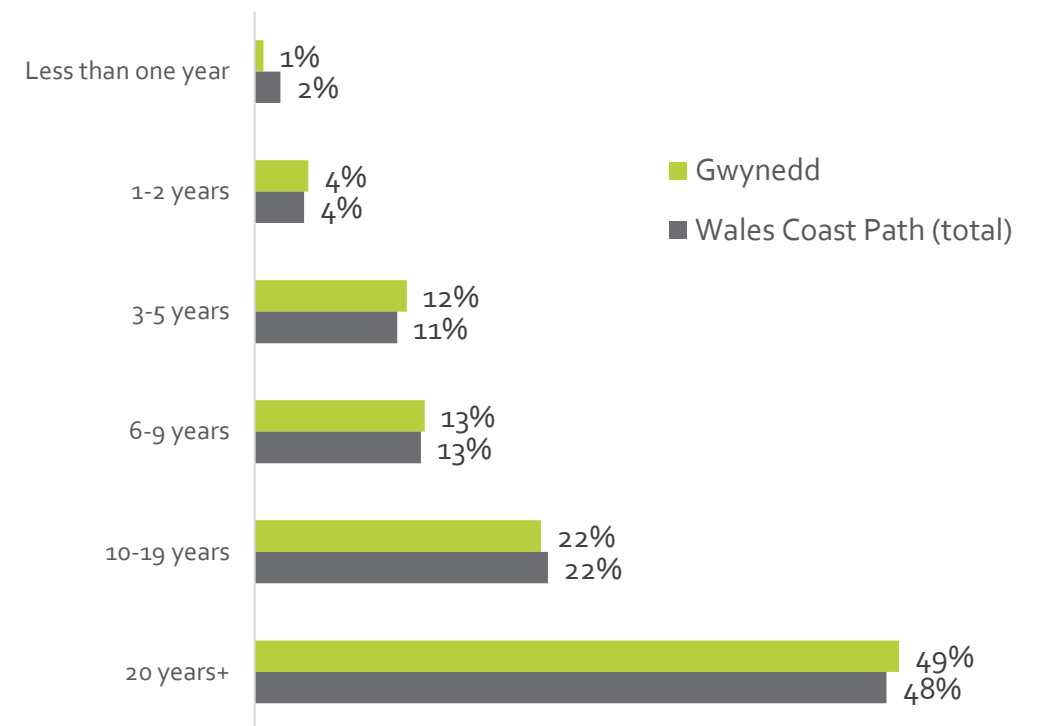| Turnover	Gwynedd	Wales Coast Path (total)
Under £50,000	13%	14%
£50,000 to £99,000	14%	14%
£100,000 to £200,000	12%	15%
£201,000 to £300,000	11%	9%
£301,000 to £500,000	7%	7%
£501,000 to £750,000	2%	4%
£751,000 to £1,000,000	1%	2%
Over £1 million	9%	8%
Don't know	20%	16%
Prefer not to say	10%	9%

8

Business credentials

Most businesses in the Gwynedd region (77%) operate from a single location in Wales, with a further 17% have multiple premises within Wales. Further, many businesses have a long working history: 49% of them have been established for 20+ years, whereas 5% have opened within the last 2 years. 46% have operated between 3 and 19 years.

Number of premises

- Gwynedd
- Wales Coast Path (total)

	Gwynedd	Wales Coast Path (total)
A single location/ premises based in Wales	77%	81%
A single location/ premises based outside Wales	0%	0%
Multiple - based ONLY in Wales	17%	14%
Multiple - based in the UK (including Wales)	6%	5%

Business tenure

- Gwynedd
- Wales Coast Path (total)

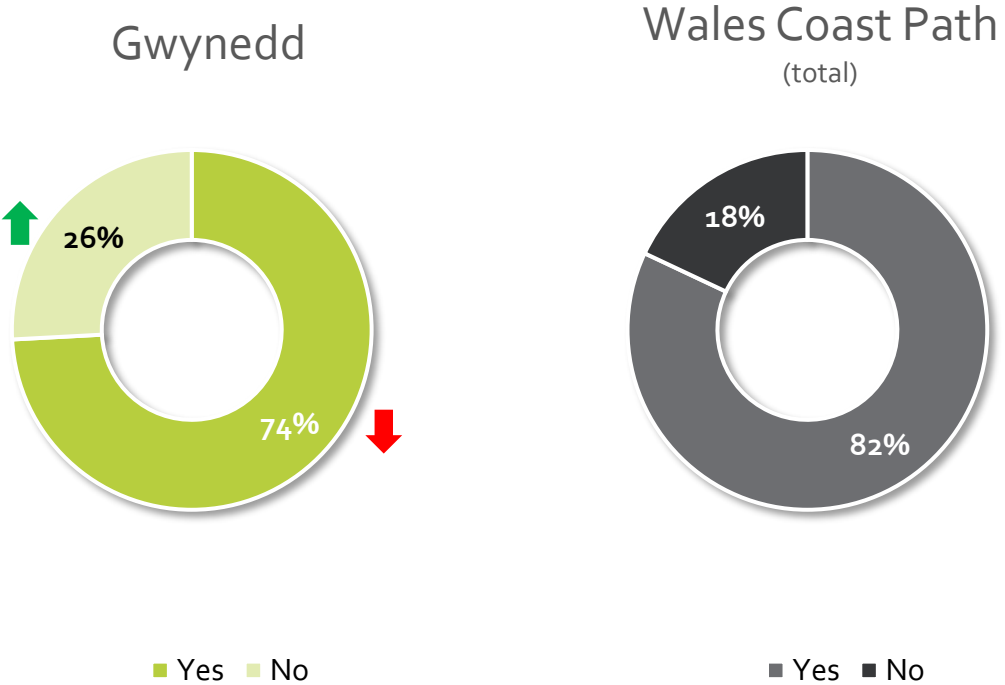|	Gwynedd	Wales Coast Path (total)
Less than one year	1%	2%
1-2 years	4%	4%
3-5 years	12%	11%
6-9 years	13%	13%
10-19 years	22%	22%
20 years+	49%	48%

Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the Gwynedd visitor region (and also assigned to Wales Coast Path)(147) . **Q06.** Does your business/organisation operate from a single location or premises, or multiple locations or premises? **C04.** Approximately how long has your business/organisation been operating from this location from?
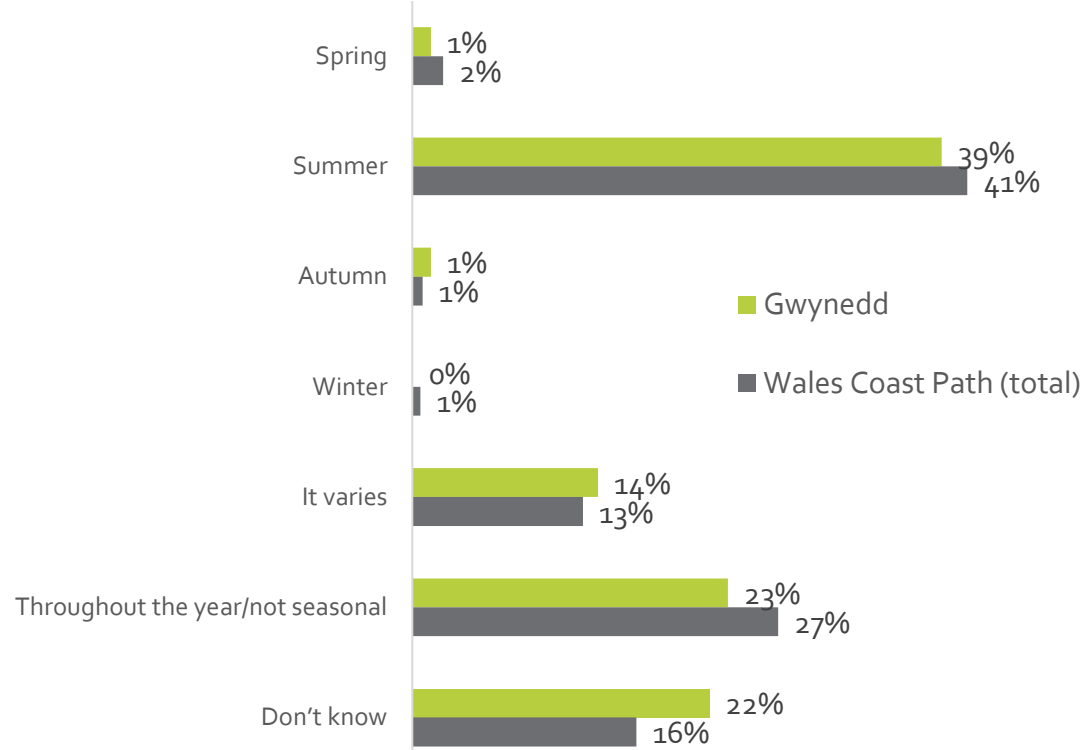
Business credentials

74% of businesses in the Gwynedd region are open all year round compared to 82% of the Wales Coast Path (total). Business is most likely to peak during the summer months for 39% of businesses, whilst another 23% state their business is not seasonal at all.

Business open all year

Gwynedd

- 74% Yes
- 26% No

Wales Coast Path (total)

- 82% Yes
- 18% No

Yes ■ No

Peak season

Season	Gwynedd	Wales Coast Path (total)
Spring	1%	2%
Summer	39%	41%
Autumn	1%	1%
Winter	0%	1%
It varies	14%	13%
Throughout the year/not seasonal	23%	27%
Don't know	22%	16%

■ Gwynedd
■ Wales Coast Path (total)

Significantly higher/lower than Wales Coast Path (total)

Wales Coast Path - Gwynedd
Importance of the path to business

Llwybr Arfordir Cymru
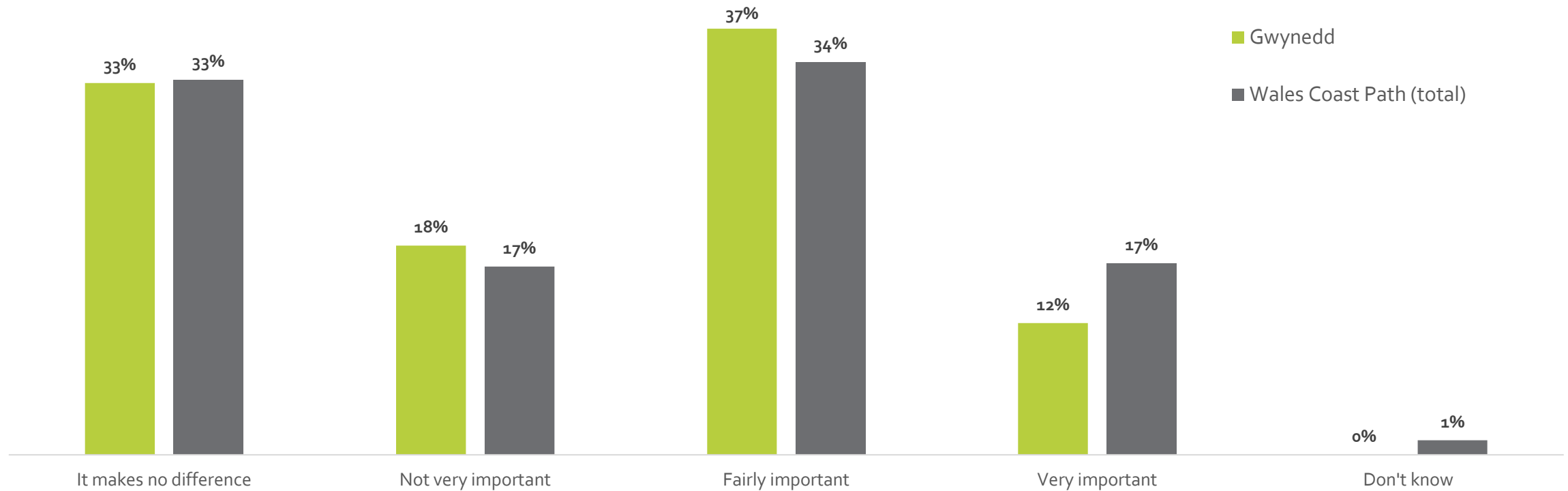Wales Coast Path

Business credentials – path specific

49% of businesses in Gwynedd consider the path to be 'important' to the success of their business (compared to 51% for the Wales Coast Path nationally), with 12% stating that it is very important, slightly lower than 17% for the Wales Coast Path nationally. In contrast, 33% say that the path does not benefit the success of their business at all.

Importance of path to the success of businesses

■ Gwynedd
■ Wales Coast Path (total)

	It makes no difference	Not very important	Fairly important	Very important	Don't know
Gwynedd	33%	18%	37%	12%	0%
Wales Coast Path (total)	33%	17%	34%	17%	1%

Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Gwynedd visitor region (and also assigned to the Wales Coast Path (147).
S03. Does your business manufacture, sell or supply any products or services to people using or visiting any of the walking trails, or gain any form of benefit from the existence of the path? **Q02**. How would you describe the importance of the path to the success of your business?

Business credentials – path specific

For 57% of businesses in Gwynedd the Wales Coast Path generates up to 10% of their sales/turnover. Another 17% say that the path generates 11-25% of their sales/turnover.

Percentage of sales/turnover generated by path users/existence of path
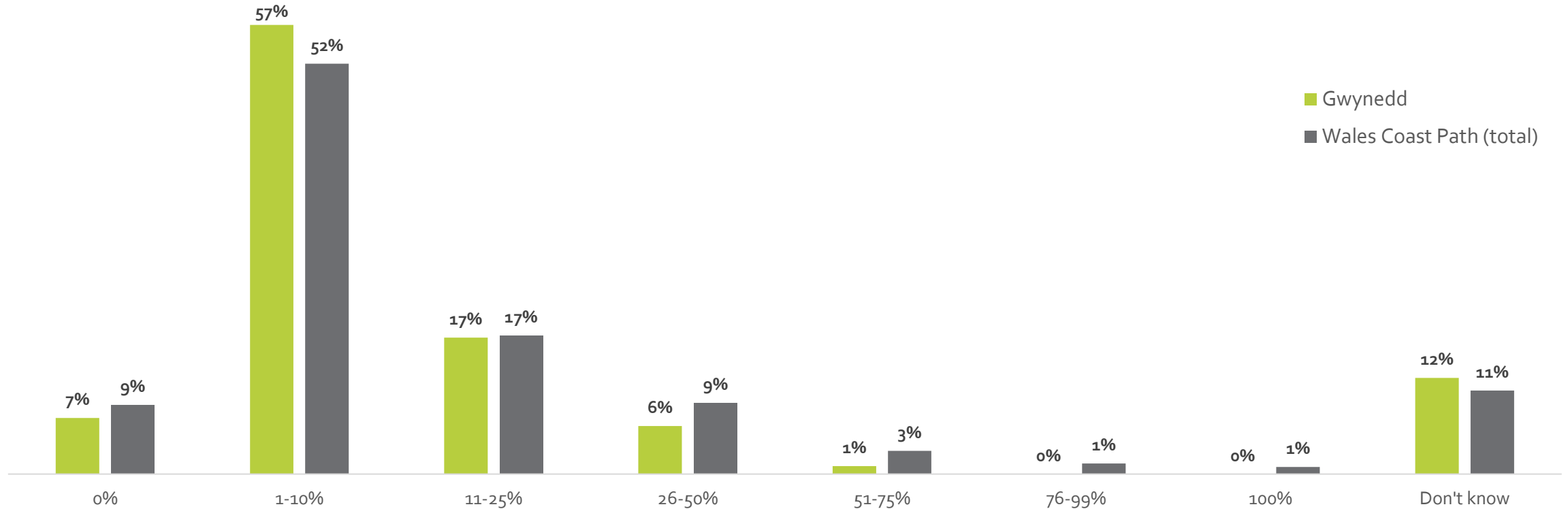
Legend:
- Gwynedd (green)
- Wales Coast Path (total) (grey)

Category	Gwynedd	Wales Coast Path (total)
0%	7%	9%
1-10%	57%	52%
11-25%	17%	17%
26-50%	6%	9%
51-75%	1%	3%
76-99%	0%	1%
100%	0%	1%
Don't know	12%	11%

Benefits of the path to businesses

Impacted the number of customers or visitors to your business/organisation
- Gwynedd: 42%
- Wales Coast Path (total): 48%

Impacted sales or turnover for your business/organisation
- Gwynedd: 29%
- Wales Coast Path (total): 36%

Helped secure employment for any of your staff
- Gwynedd: 9%
- Wales Coast Path (total): 12%

The introduction of new products or services
- Gwynedd: 7%
- Wales Coast Path (total): 9%

The extension of your opening hours or the times of the year you operate
- Gwynedd: 7%
- Wales Coast Path (total): 8%

Allowed you to expand or improve your business/organisation in any other way
- Gwynedd: 7%
- Wales Coast Path (total): 7%

The reason your business/organisation is located where it is
- Gwynedd: 6%
- Wales Coast Path (total): 11%

Impacted the number of staff you employ
- Gwynedd: 5%
- Wales Coast Path (total): 9%

It has made no difference at all
- Gwynedd: 49%
- Wales Coast Path (total): 46%

■ Gwynedd
■ Wales Coast Path (total)

42% businesses in the Gwynedd region agree that the presence of the path has increased the number of visitors to their business, with another 29% stating that it has benefitted their turnover.
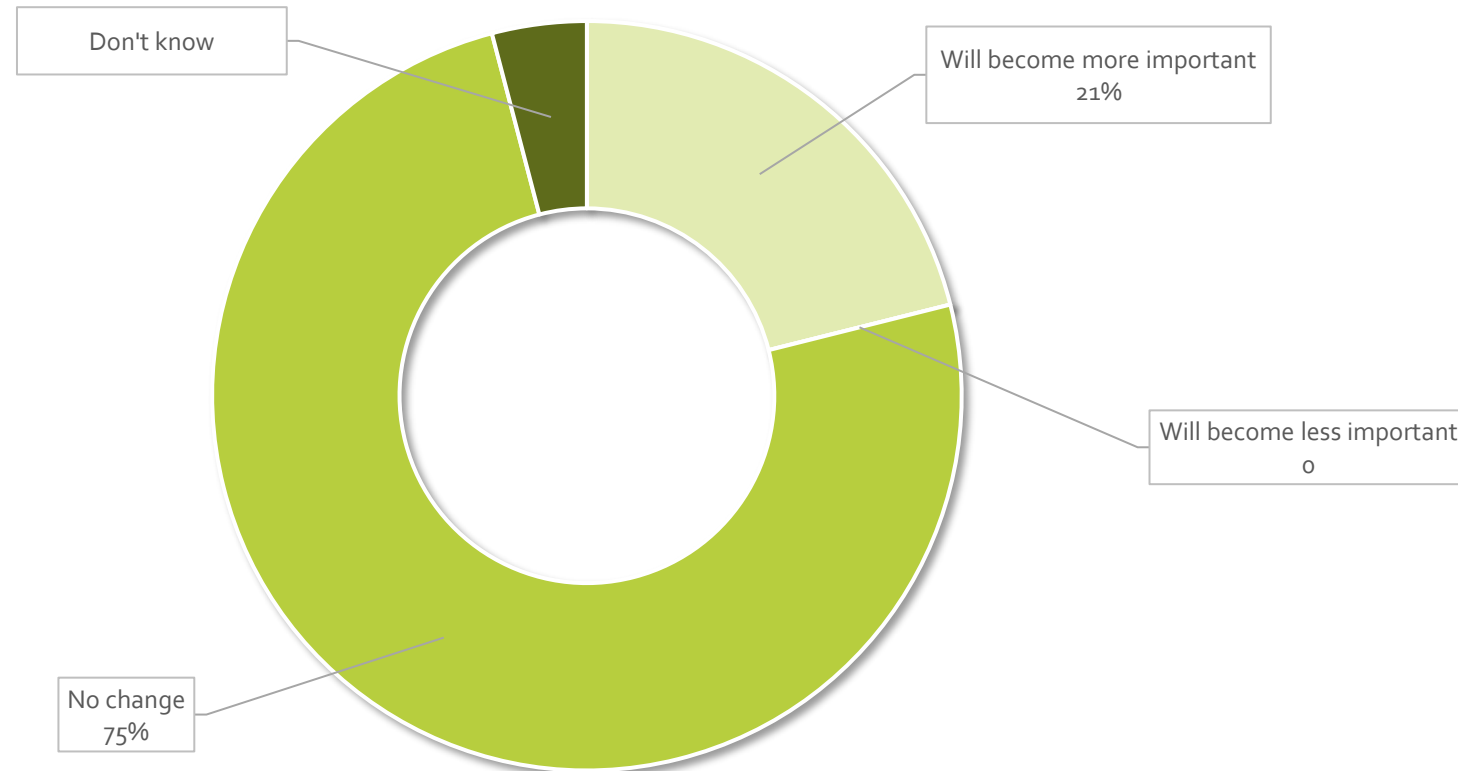
For 9% of businesses, it helped secure employment for staff members. Yet, a smaller proportion of businesses reported these benefits than the Wales Coast Path average. It should be noted, this difference is not significant.

However, for 49% of businesses the path has made no difference.

Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Gwynedd visitor region (and also assigned to Wales Coast Path) (147) **Q24a.** Do you think the presence of the Wales Coast Path has resulted in or contributed to any of the following for your business or organisation?

Importance of the path to businesses

75% of businesses in Gwynedd feel that the the path will not become more important to their success. However, 21% feel that it **will** become more important. Of these 31 businesses, many thought that the main reason for this is because of the potential increase in tourism due to path promotion.

Change in importance of the path to business success

Don't know

Will become more important
21%

Will become less important
0

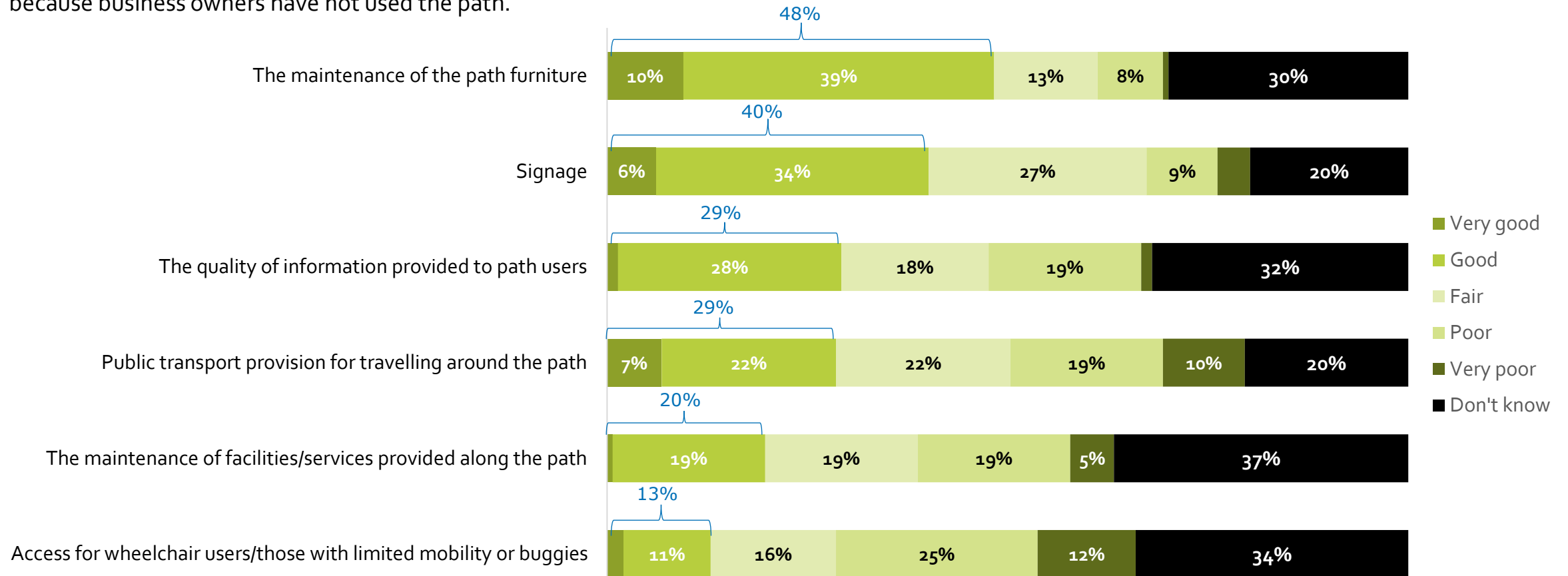No change
75%

Wales Coast Path - Gwynedd
Path quality

Llwybr Arfordir Cymru
Wales Coast Path
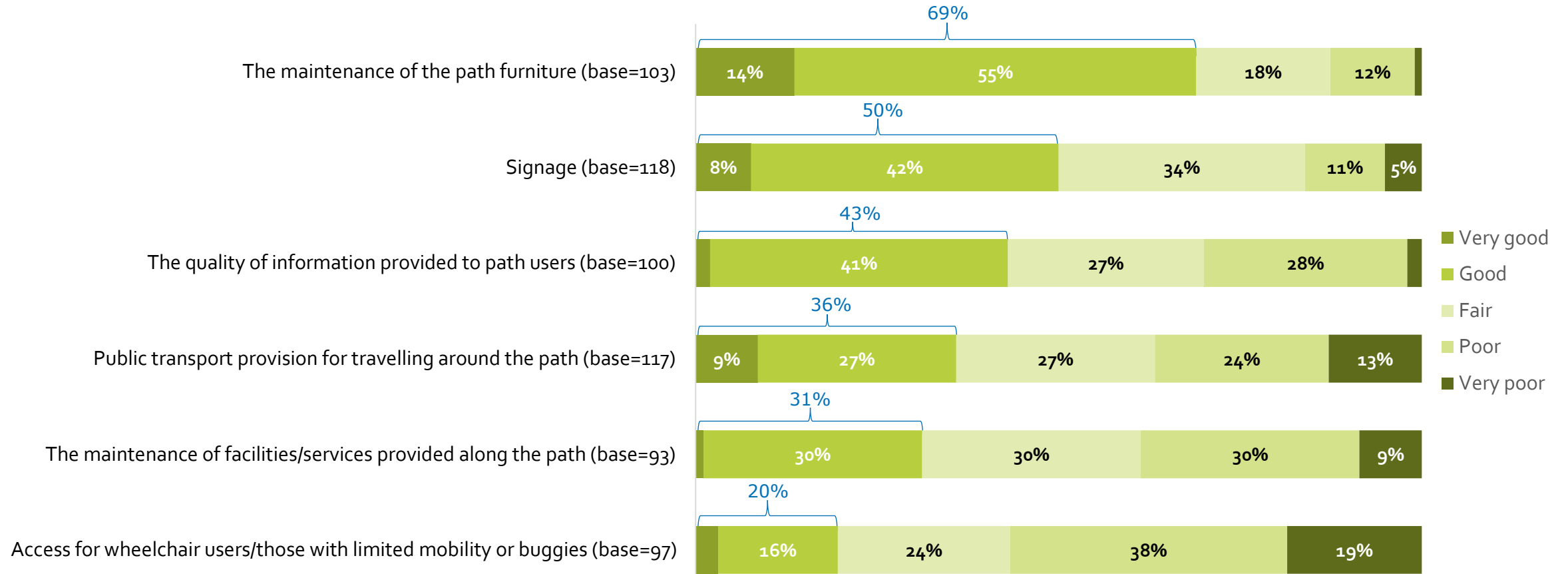
Perceptions of aspects of the path

All businesses were presented with a list of six aspects and asked to rate each one. Of all the aspects rated, businesses are most positive with the maintenance of the path furniture (48% good/very good) and signage (40% good/very good). In contrast, they are least positive about the accessibility of the path (13% good/very good). However, between 20% and 37% of businesses were unsure of how to answer. This could be due to a lack of awareness because business owners have not used the path.

Chart legend:
- Very good
- Good
- Fair
- Poor
- Very poor
- Don't know

Aspect	Very good	Good	Fair	Poor	Very poor	Don't know	Good/Very good
The maintenance of the path furniture	10%	39%	13%	8%		30%	48%
Signage	6%	34%	27%	9%		20%	40%
The quality of information provided to path users		28%	18%	19%		32%	29%
Public transport provision for travelling around the path	7%	22%	22%	19%	10%	20%	29%
The maintenance of facilities/services provided along the path		19%	19%	19%	5%	37%	20%
Access for wheelchair users/those with limited mobility or buggies		11%	16%	25%	12%	34%	13%

Base: All businesses located in the Gwynedd visitor region (and also assigned to Wales Coast Path)(147) **Q20**. How would you rate each of the following aspects? *Base varies by statement due to the removal of 'don't know' responses. Data labels <5% not shown

Perceptions of aspects of the path

When excluding 'don't know' responses, ratings of the maintenance of path furniture remains most positive (69% good/very good), followed by signage, with 50% of those aware rating this as good/very good. Unfortunately, dissatisfaction with accessibility is higher, reaching 57% poor/very poor compared to 37% with don't know responses included.

69%

The maintenance of the path furniture (base=103)
| 14% | 55% | 18% | 12% |

50%

Signage (base=118)
| 8% | 42% | 34% | 11% | 5% |

43%

The quality of information provided to path users (base=100)
| 41% | 27% | 28% |

36%

Public transport provision for travelling around the path (base=117)
| 9% | 27% | 27% | 24% | 13% |

31%

The maintenance of facilities/services provided along the path (base=93)
| 30% | 30% | 30% | 9% |

20%

Access for wheelchair users/those with limited mobility or buggies (base=97)
| 16% | 24% | 38% | 19% |

Legend:
- Very good
- Good
- Fair
- Poor
- Very poor

Base: All businesses located in the Gwynedd visitor region (and also assigned to Wales Coast Path)(147) **Q20**. How would you rate each of the following aspects? *Base varies by statement due to the removal of 'don't know' responses. Data labels <5% not shown
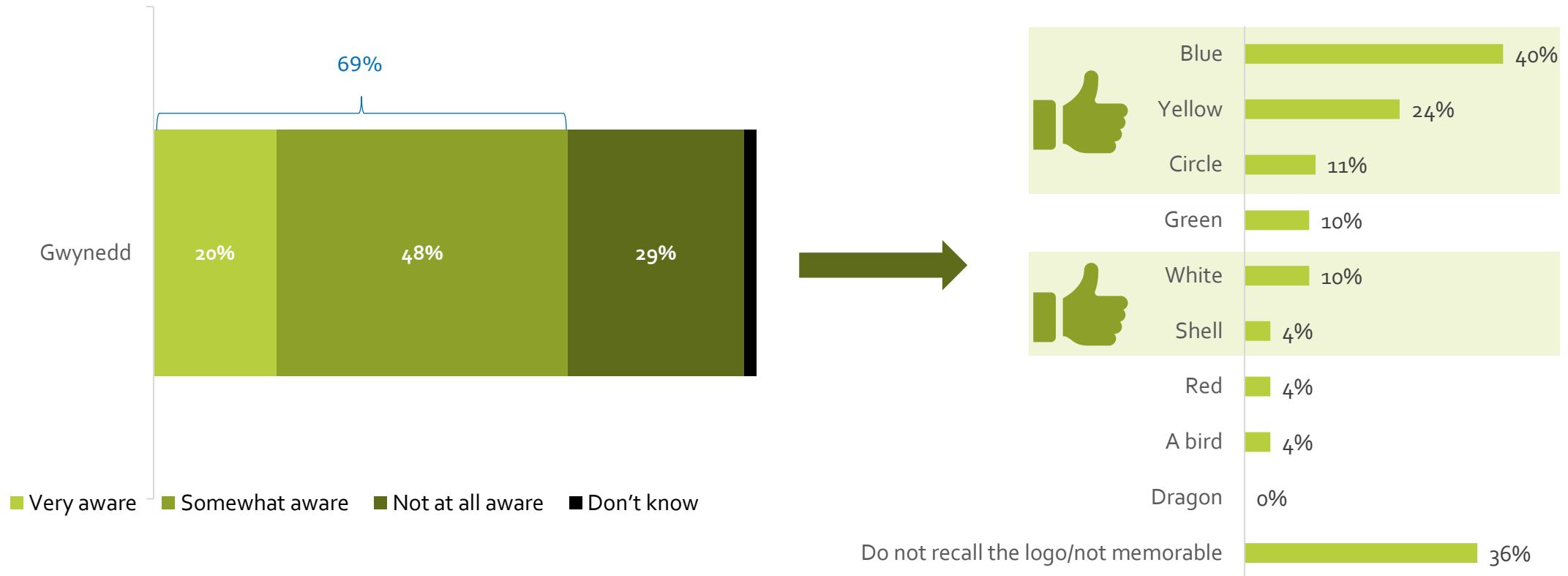
18

Wales Coast Path - Gwynedd
Path promotion

Branding Awareness

69% of businesses in the Gwynedd region have at least some awareness of the path's branding, with 20% of businesses stating they are 'very aware'. However, when those respondents were asked to describe the logo, not all got the details correct: 40% correctly stated that the logo is blue, 24% say that it is yellow, and 10% say white, but only 4% correctly stated that the logo represents a shell. Furthermore, 36% of them could not recall the logo.
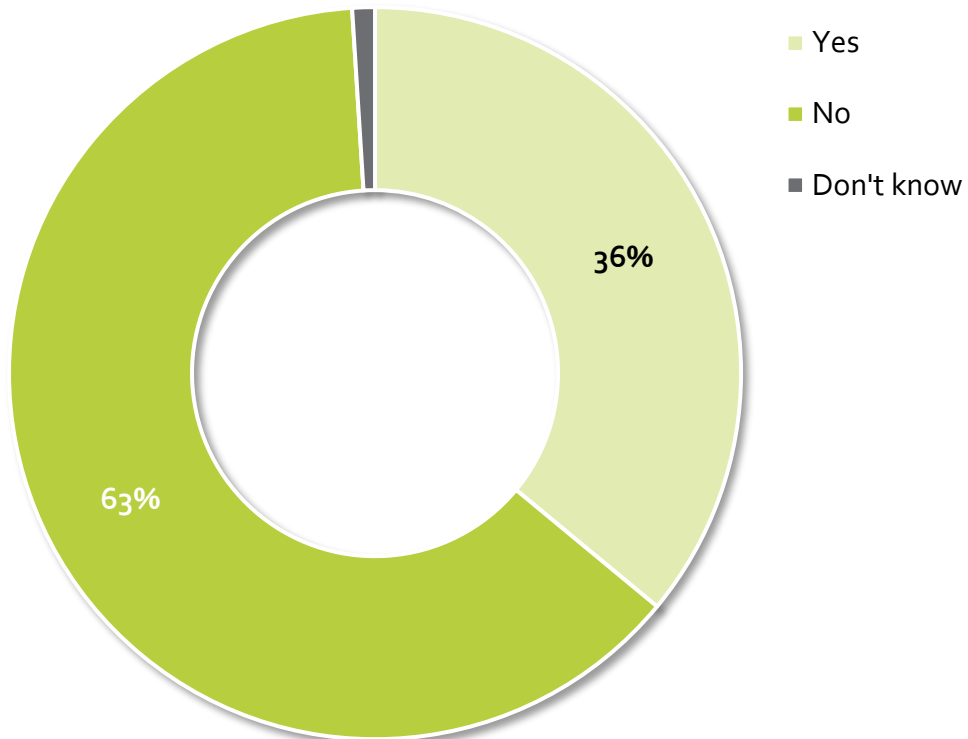
69%

Gwynedd	**20%** · **48%** · **29%**

■ Very aware ■ Somewhat aware ■ Not at all aware ■ Don't know

Blue — 40%
Yellow — 24%
Circle — 11%
Green — 10%
White — 10%
Shell — 4%
Red — 4%
A bird — 4%
Dragon — 0%

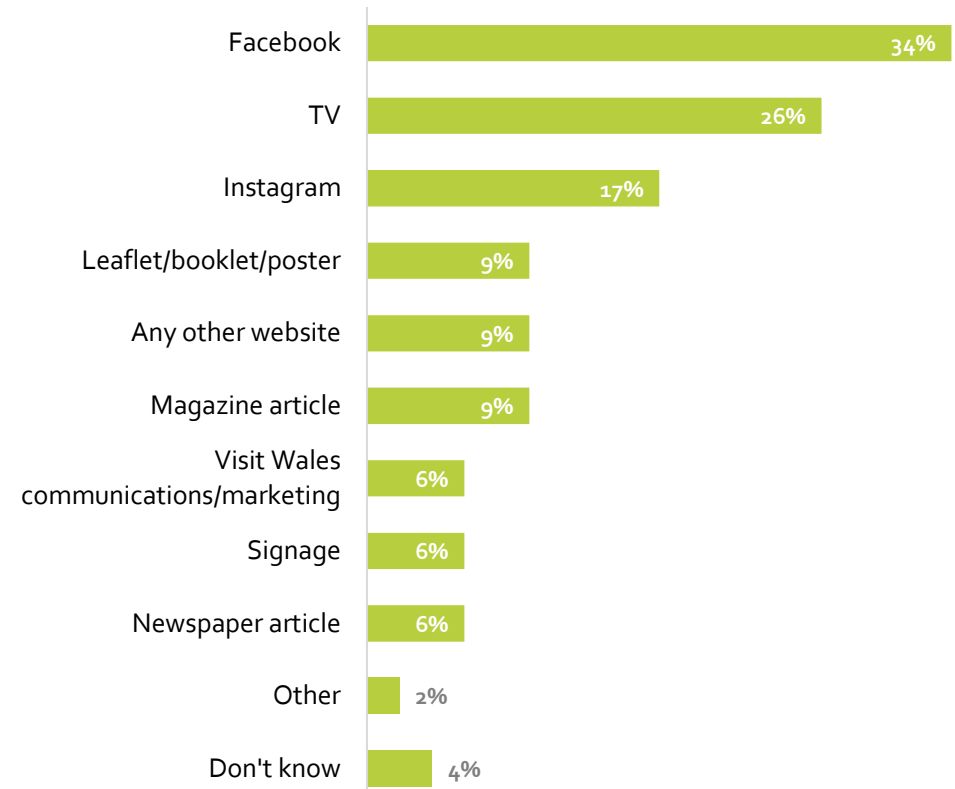Do not recall the logo/not memorable — 36%

Advertising awareness

36% of businesses in the Gwynedd region have seen some publicity or advertising related to the path over the last 12 months. For those 53 businesses who have seen some, the main sources are Facebook (34%), TV (26%) and Instagram (17%).

% seen publicity/advertising

- Yes
- No
- Don't know

36%
63%

Where publicity/advertising seen

Facebook	34%
TV	26%
Instagram	17%
Leaflet/booklet/poster	9%
Any other website	9%
Magazine article	9%
Visit Wales communications/marketing	6%
Signage	6%
Newspaper article	6%
Other	2%
Don't know	4%

Base: All businesses located in the Gwynedd visitor region (and also assigned to Wales Coast Path)(147) **Q12.** Over the past year, have you seen or heard any publicity, advertising or information about the Wales Coast Path? **Base:** All respondents who have seen or heard publicity, advertising or information (53) **Q13.** Please can you tell me where or how you have seen publicity, advertising or information for the Wales Coast Path? *Note – mentions <5% not shown

Perceptions of advertising

All businesses in Gwynedd who have seen or heard any publicity, advertising or information about the Wales Coast Path were asked to provide feedback on the frequency and effectiveness (in terms of attracting visitors/users and benefitting the future success of businesses). 72% in Gwynedd feel the frequency of advertising is at least fair (vs 76% total). 66% rate the 'effectiveness' of recent publicity to attract users as 'good' or 'fair' (a significant drop from 81% for total). Additionally, 51% rate the benefit on the future success of their business as good/fair vs 64% total.

| "How would you rate the publicity, advertising or information you have seen or heard about the path in the past year, in terms of... ?"				
	Good	**Fair**	**Poor**	**Don't know**
Frequency	30% (35% total)	42% (41% total)	23% (18% total)	6% (5% total)
Effectiveness in terms of attracting visitors to the path	34% ⬇ (50% total)	32% (31% total)	17% (11% total)	17% (8% total)
Effectiveness in terms of benefitting the success of your business	26% (30% total)	25% (34% total)	26% (18% total)	23% (18% total)

Base: All businesses assigned to the Wales Coast Path who have seen or heard publicity, advertising or information (255), All businesses located in the Gwynedd visitor region (and also assigned to Wales Coast Path) who have seen or heard publicity, advertising or information (53) **Q14.** How would you rate the publicity, advertising or information you have seen or heard about the Wales Coast Path in the past year, in terms of... ?

⬇⬆ Significantly higher/lower than Wales Coast Path (total)

Receipt of direct communications

Just 6% of businesses recall having received direct communications about the Wales Coast Path in the past year (vs. 10% on average for the Wales Coast Path in total).

% received direct communications
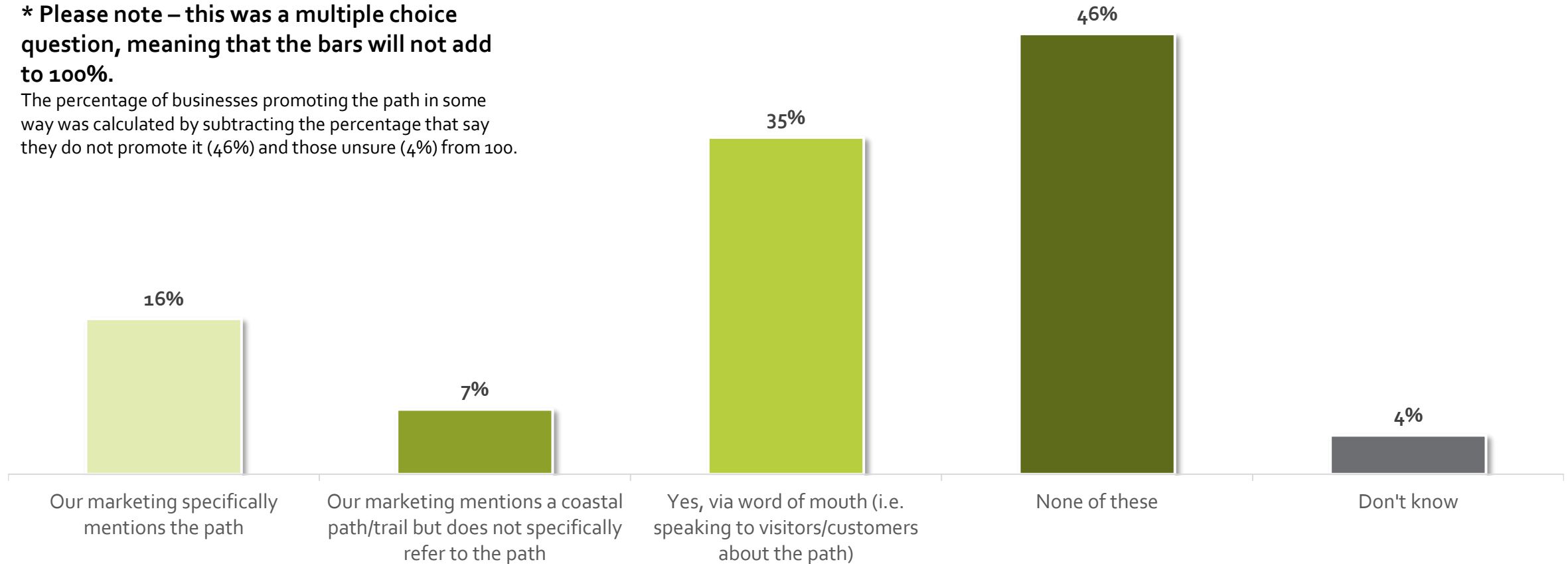

6%

94%

■ Yes   ■ No
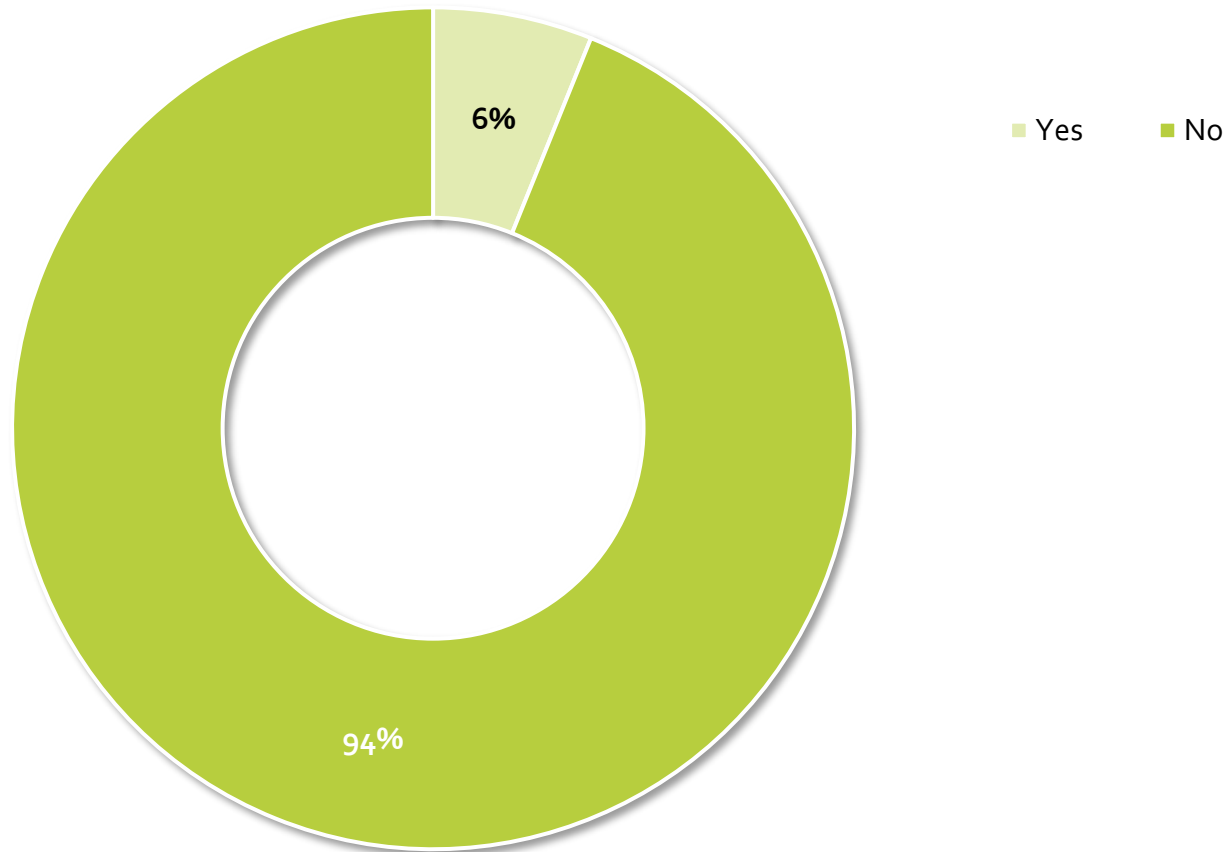
* Please note – the base size for reporting feedback on the direct communications received is too low to analyse at a regional level.

Path promotion by businesses

50% of businesses in the Gwynedd region promote Wales Coast Path in some way, with 16% stating that the path is specifically mentioned in their marketing materials. 7% mention a pathway, but not by name, and 35% promote the pathway via word-of-mouth.

* Please note – this was a multiple choice question, meaning that the bars will not add to 100%.
The percentage of businesses promoting the path in some way was calculated by subtracting the percentage that say they do not promote it (46%) and those unsure (4%) from 100.

| 16% | 7% | 35% | 46% | 4% |
| Our marketing specifically mentions the path | Our marketing mentions a coastal path/trail but does not specifically refer to the path | Yes, via word of mouth (i.e. speaking to visitors/customers about the path) | None of these | Don't know |

Path promotion by businesses

All 33 businesses who mention the Wales Coast Path in their marketing materials were asked how prominent it is. 39% of those in Gwynedd consider it to just be a passing reference. A further 36% state that some detail is referred to in their marketing materials. For 24% it is an important component. No businesses describe it as the main theme.

Prominence of path in marketing materials
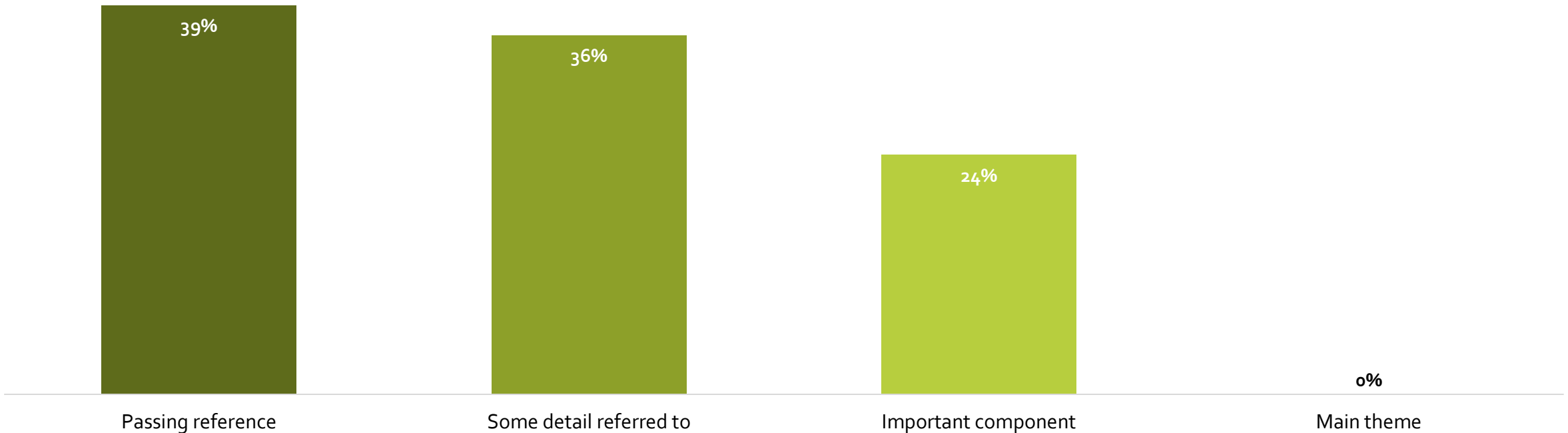
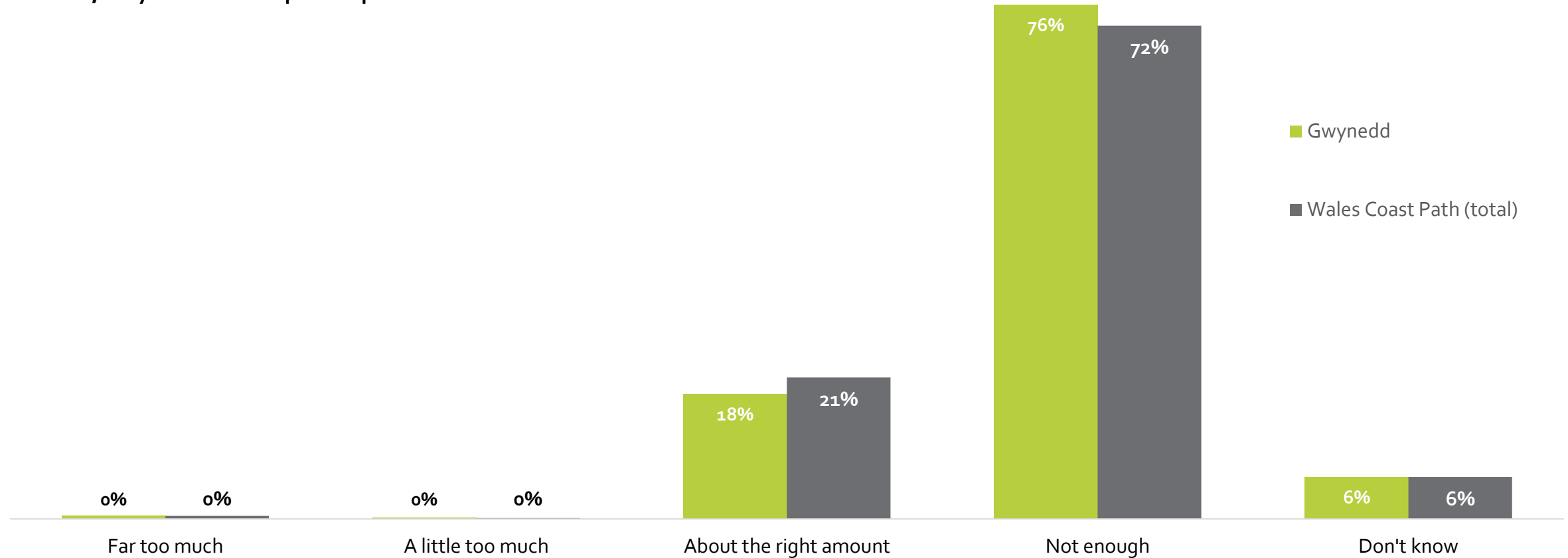| Passing reference	Some detail referred to	Important component	Main theme
39%	36%	24%	0%

Base: All businesses located in the Gwynedd visitor region (and also assigned to Wales Coast Path) who mention the in their marketing materials (33) **Q18**. Which of the following best describes how prominent the Wales Coast Path is in your marketing?

Path promotion

76% of businesses in Gwynedd think the Wales Coast Path is not promoted enough. Just 18% think it is already promoted enough.
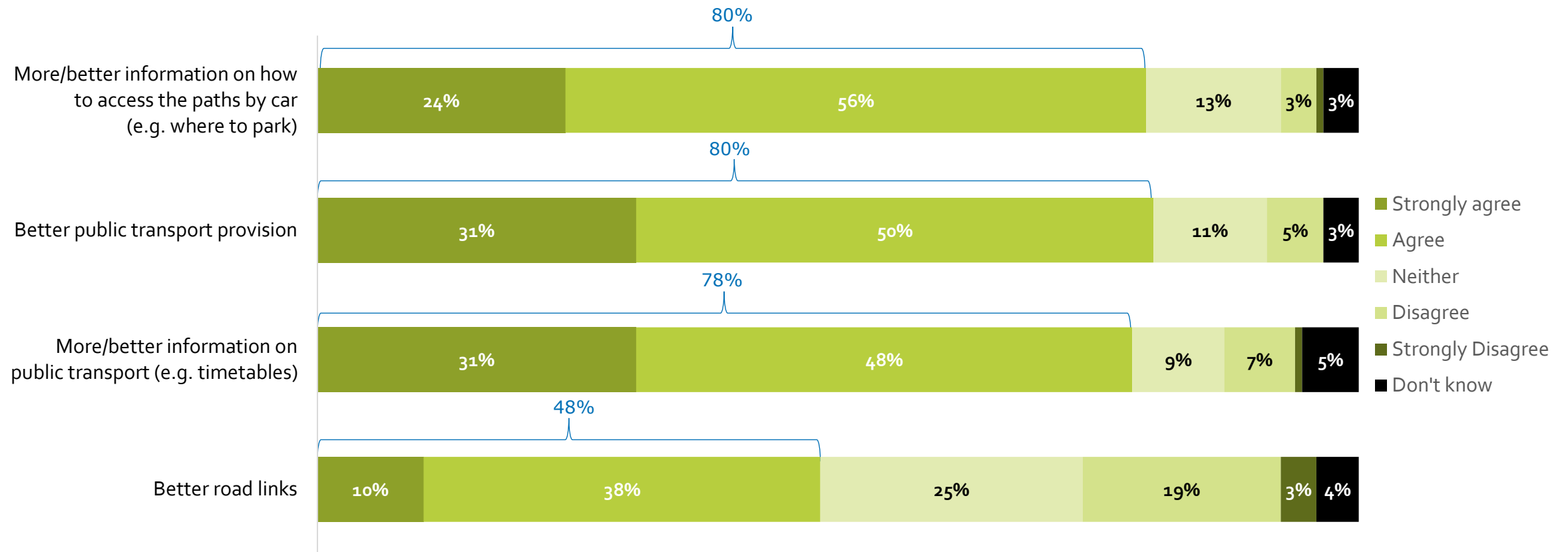
Overall, do you think the path is promoted...?

- Gwynedd
- Wales Coast Path (total)

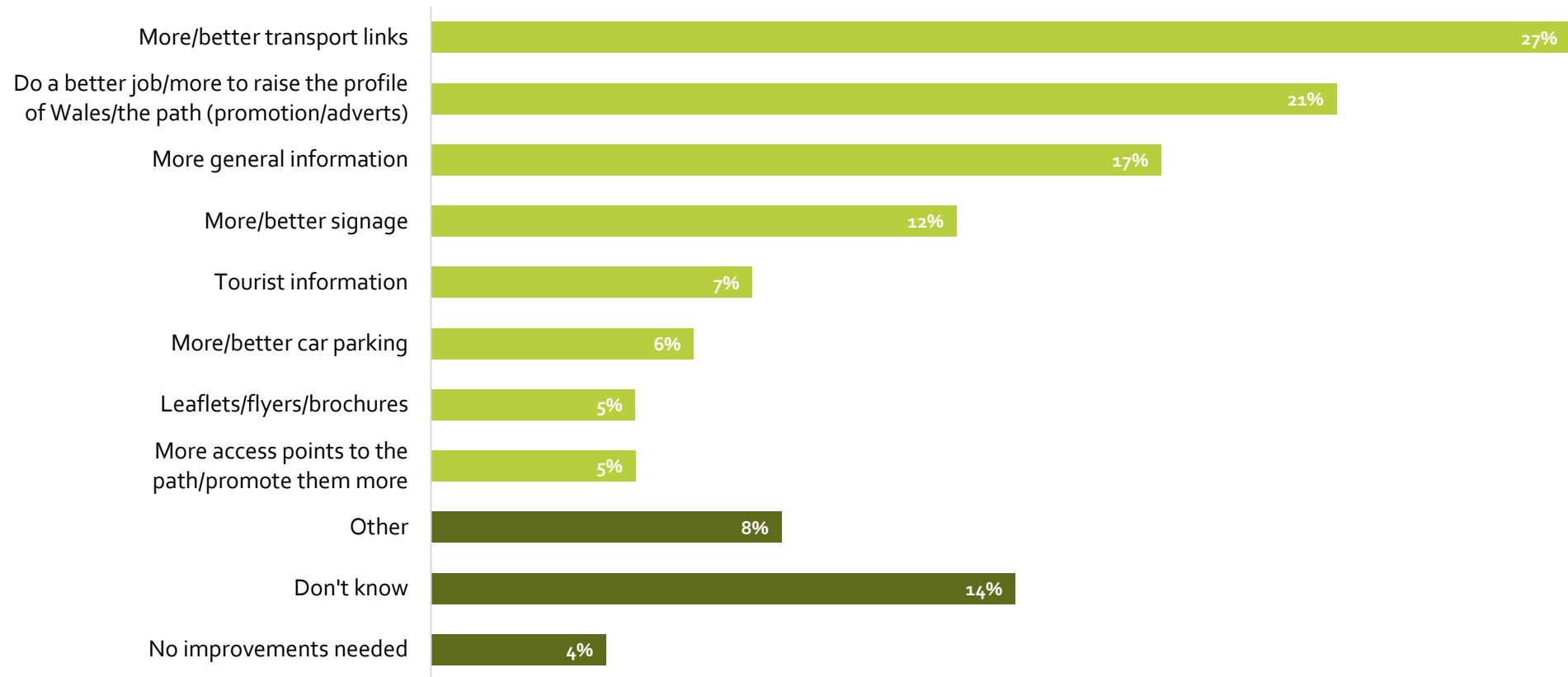|	Far too much	A little too much	About the right amount	Not enough	Don't know
Gwynedd	0%	0%	18%	76%	6%
Wales Coast Path (total)	0%	0%	21%	72%	6%

Encouraging visits

Businesses were presented with four potential improvements to the path and asked to state to what extent they agree or disagree whether they are needed. 80% of businesses agree that more/better information on how to access the path by car is needed. Additionally, 80% agreed that better public transport provision is needed, and 78% agree that more information on public transport is needed.

Improvement	Strongly agree	Agree	Neither	Disagree	Strongly Disagree	Don't know	Total agree
More/better information on how to access the paths by car (e.g. where to park)	24%	56%	13%	3%		3%	80%
Better public transport provision	31%	50%	11%	5%		3%	80%
More/better information on public transport (e.g. timetables)	31%	48%	9%	7%		5%	78%
Better road links	10%	38%	25%	19%	3%	4%	48%

Legend: Strongly agree, Agree, Neither, Disagree, Strongly Disagree, Don't know
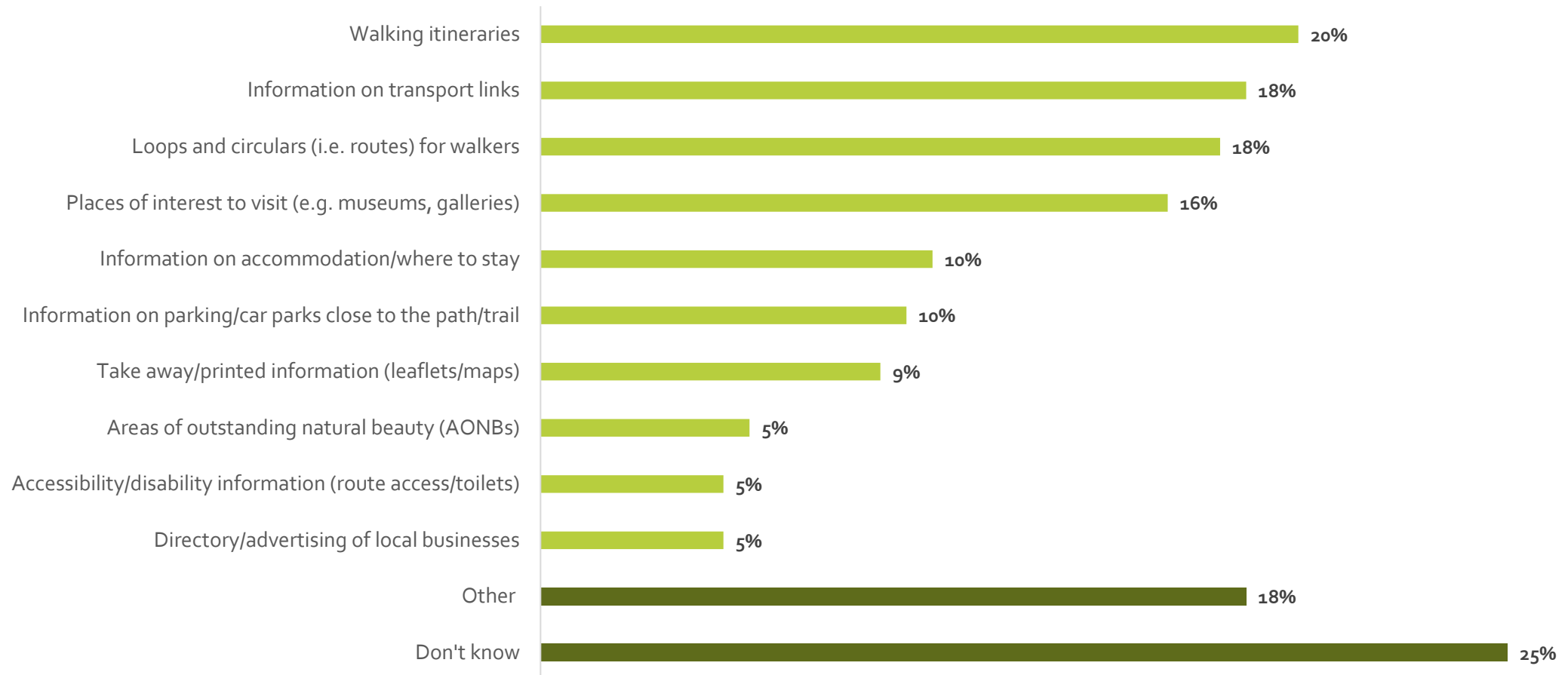
Improving access

When asked in an open question what improvements are necessary to improve access, the top recommendation from businesses in Gwynedd for the Wales Coast Path is to improve transport links (27%). 21% suggest that the Wales Coast Path needs more promotion and 17% feel that more general information is needed. This prioritisation is generally in line with the findings for the Wales Coast Path nationally.

Category	%
More/better transport links	27%
Do a better job/more to raise the profile of Wales/the path (promotion/adverts)	21%
More general information	17%
More/better signage	12%
Tourist information	7%
More/better car parking	6%
Leaflets/flyers/brochures	5%
More access points to the path/promote them more	5%
Other	8%
Don't know	14%
No improvements needed	4%

Information to support business customers/path users

The most frequently mentioned information that businesses believe that their customers would find the most beneficial relate to walking itineraries (20%), transport links (18%), loops and circulars (routes) (18%) and places of interest (16%) for walkers. The top three suggestions here are also broadly in line with the findings for the Wales Coast Path nationally.

Category	Percentage
Walking itineraries	20%
Information on transport links	18%
Loops and circulars (i.e. routes) for walkers	18%
Places of interest to visit (e.g. museums, galleries)	16%
Information on accommodation/where to stay	10%
Information on parking/car parks close to the path/trail	10%
Take away/printed information (leaflets/maps)	9%
Areas of outstanding natural beauty (AONBs)	5%
Accessibility/disability information (route access/toilets)	5%
Directory/advertising of local businesses	5%
Other	18%
Don't know	25%

Wales Coast Path - Gwynedd
Conclusions and recommendations

Llwybr Arfordir Cymru
Wales Coast Path

Conclusions

The Wales Coast Path plays an important role in supporting local businesses and driving visitor engagement.
51% of businesses in Gwynedd consider the path important to their success, and 42% report an increase in visitors attributed to the path. Additionally, 57% of businesses benefit from at least 1-10% of their turnover being linked to path users.

Businesses can enhance their marketing strategies to better leverage the path.
50% of businesses already promote the path, but only 24% describe it as an important component of their marketing. Furthermore, 76% of businesses feel that the path is under-promoted.

Public awareness and branding can be improved to create stronger recognition.
69% of businesses are aware of the path's branding, but 36% of respondents could not recall the logo, and only 4% recognised key logo elements like the shell.

Recommendations

Collaborate with local businesses to create a "Path Visitor Experience Package," bundling activities, accommodations, and dining offers.
This can encourage increased engagement from path users while spreading economic benefits locally.

Provide businesses with promotional toolkits containing high-quality visuals, social media templates, and storytelling content.
Encourage them to incorporate the path more prominently in their marketing, highlighting how their offerings align with the path experience.

Reinforce brand recognition by designing memorable campaigns, such as interactive signage along the path that ties the logo to key features of the path.
Use social media challenges where visitors share photos featuring the logo to increase awareness organically.

Conclusions

Recommendations

Addressing accessibility issues can greatly enhance the visitor experience.

80% of businesses agree that better information on car access is needed, and the same proportion supports improvements in public transport. Dissatisfaction with path accessibility also reached 57%.

Create practical guides with transport links, car parking spots, and shuttle service details.
Work with local councils to improve accessibility, particularly at key entry points to the path, and provide clear, consistent signage.

There is strong demand for walking itineraries, loops, and routes with additional information.
Businesses identified itineraries (20%), loops and circular routes (18%), and transport details (18%) as the most beneficial information for path users.

Develop downloadable itineraries tailored to different visitor needs, such as family-friendly routes, nature trails, or cultural tours.
Include practical information like estimated walking times and nearby attractions to ensure convenience and engagement.

Summer peaks present an opportunity for seasonal promotions and events.
Business activity peaks during the summer for 39% of businesses, indicating a strong opportunity to target visitors during this period.

Introduce seasonal campaigns, such as summer festivals or guided walks, that incorporate local attractions and businesses.
Promote these events through digital channels, leveraging the path as the central theme to drive higher engagement.

For more information

Julie Hollingsworth, Associate Director
jhollingsworth@djsresearch.com

Clare Rapkins, Senior Research Manager
crapkins@djsresearch.com

Emily Ward, Senior Research Executive
eward@djsresearch.com

djs research

Head office: 3 Pavilion Lane, Strines, Stockport, Cheshire, SK6 7GH

Leeds office: Regus, Office 18.09, 67 Albion Street Pinnacle, 15th–18th Floors, Leeds, LS1 5AA

+44 (0)1663 767 857 | djsresearch.co.uk

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