

Wales Coast Path – Carmarthen Bay & Gower Business Survey 2024

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Contents

- 3 Background and methodology
- 6 Business profiles
- 11 Importance of the path to business
- 16 Path quality
- 19 Path promotion
- 28 Conclusions and recommendations



Wales Coast Path - Carmarthen Bay & Gower

Background and Methodology

Background and Methodology

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

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

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 **30 are located in Carmarthen Bay & Gower** and were assigned to the Wales Coast Path, based on that being their closest route or the one which they derived the most benefit from. This report focuses on those businesses only.

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

A guide to this report

Rounding

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

Base sizes

Please note, the base sizes included are the total number of people who responded to a particular question. As not everyone answered all questions, the base for individual questions may be lower than the total number of respondents who responded to the survey, are located in Carmarthen Bay & Gower and were assigned to the Wales Coast Path (30). As the base is low for this region, please review with caution.

Definition of 'Assigned' path

After answering a series of screening questions to determine the proximity (So2a, So2b) and importance of routes to individual businesses (So3, Qo1 and Qo2), businesses were assigned a path and asked to respond to the remaining survey questions based on their 'assigned' path. In instances where businesses were located close to or benefitted from more than one path, 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

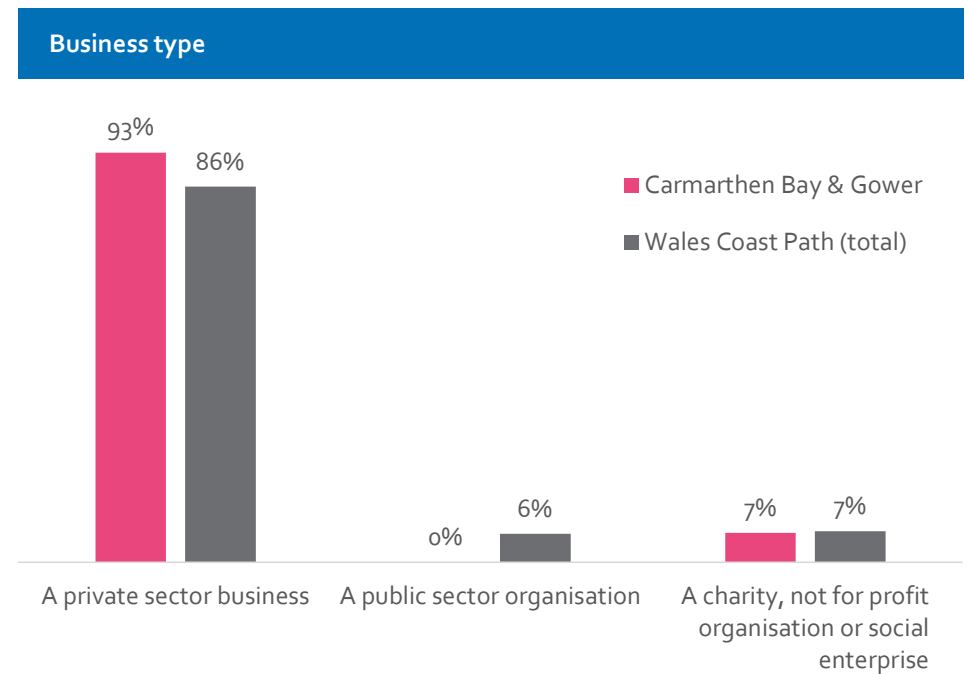
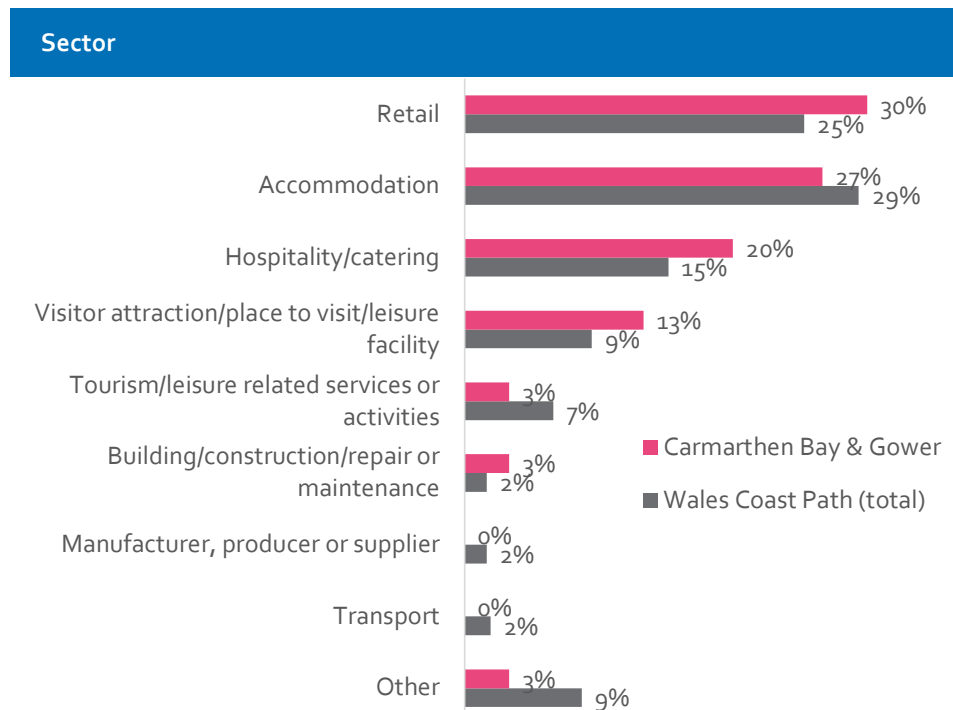
In this report, results for those based in Carmarthen Bay & Gower and assigned to the Wales Coast Path are compared to the average figures from the total sample of businesses assigned to the Wales Coast Path, regardless of business location. The combined average is labeled as "Wales Coast Path (total)"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

Business profiles (I)

The 30 businesses in Carmarthen Bay and Gower represent a range of sectors, with 57% in the accommodation or retail sectors. A further 20% work in the hospitality and catering sector. Overall, 93% of businesses in Carmarthen Bay and Gower are in the private sector. None operate in the public sector.

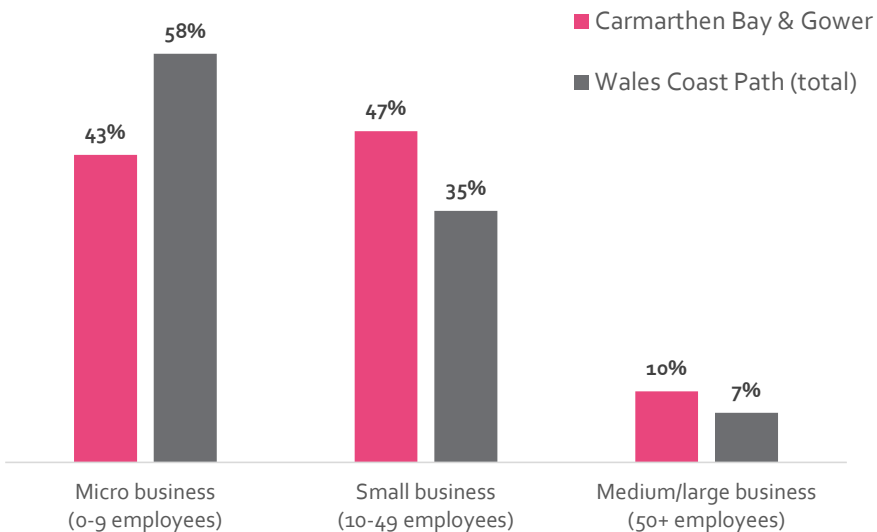


Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path (30). **Q05B.** Which of the following best summarises your main business activities? **Co1.** Which one of the following best describes your business?

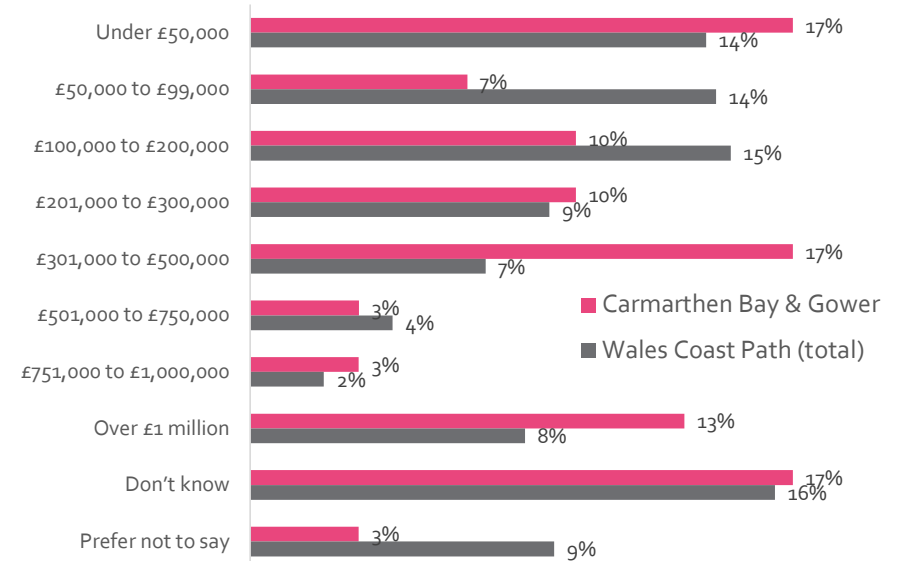
Business profiles (II)

The majority of businesses in Carmarthen Bay and Gower are micro or small businesses - 47% have 10-49 employees, whilst 43% have even fewer. However, 10% are medium to large businesses (with 50+ employees). Moreover, 61% of businesses in Carmarthen Bay and Gower have a turnover of £500,000 or less.

Business size



Turnover



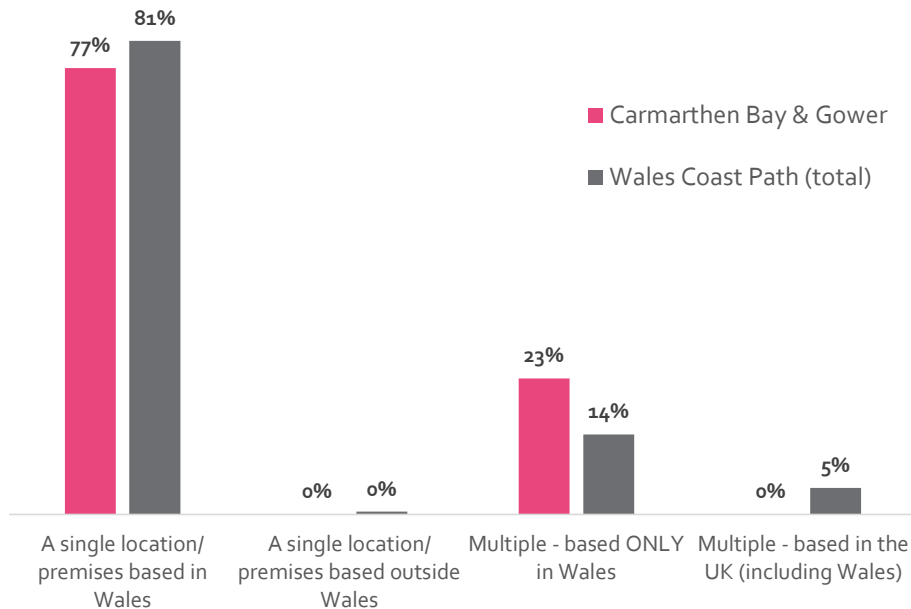
Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path) (30).

Q07A/B. Including yourself, how many permanent full and part time staff are employed by your business? **Co2.** What was the approximate turnover of your business (or sales value) in your last financial year? .

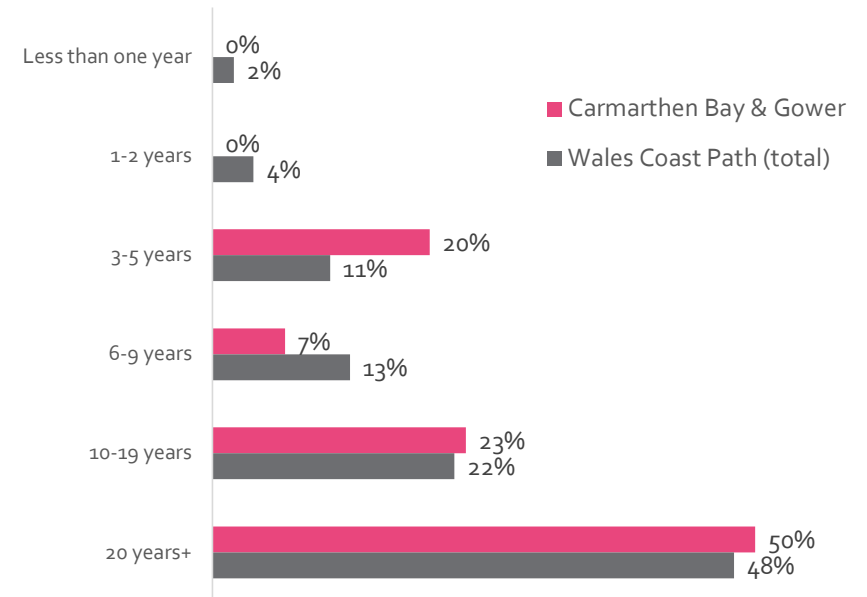
Business profiles (III)

Businesses in Carmarthen Bay and Gower range in terms of tenure. Whilst 50% have been established for 20+ years, another 20% have opened within the last five years. Additionally, none of the businesses we spoke to have any premises in England, Scotland or Ireland. Instead, 77% operate from a single location within Wales, and 23% have multiple premises within Wales.

Number of premises



Business tenure



Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path (30).

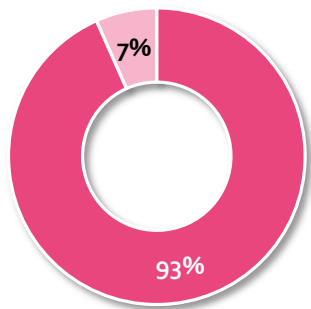
Qo6. Does your business operate from a single location or premises, or multiple locations or premises? **Co4.** Approximately how long has your business been operating from this location from?

Business profiles (IV)

Almost all businesses in Carmarthen Bay and Gower say that they are open year-round. Whilst 23% state that business remains steady throughout the year, 50% state that business peaks in the summer months.

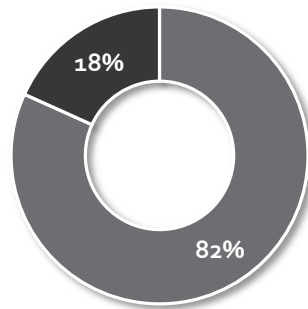
Business open all year

Carmarthen Bay & Gower



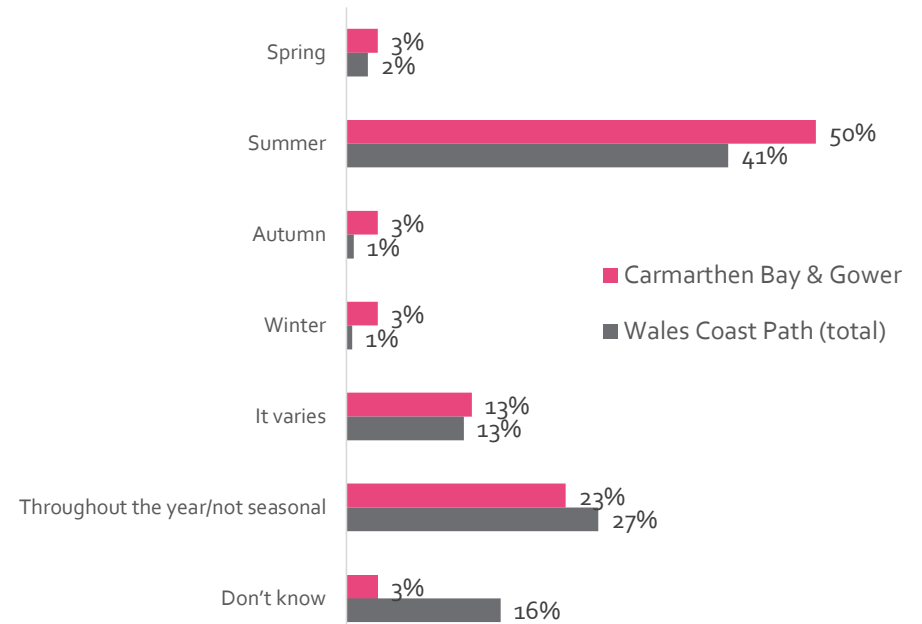
■ Yes ■ No

Wales Coast Path (total)



■ Yes ■ No

Peak season



Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path) (30).

Q09a. is your business open all year? **Q09B.** Is there a particular season or time of year that use of your products or services peaks as a result of the Wales Coast Path or National Trails?

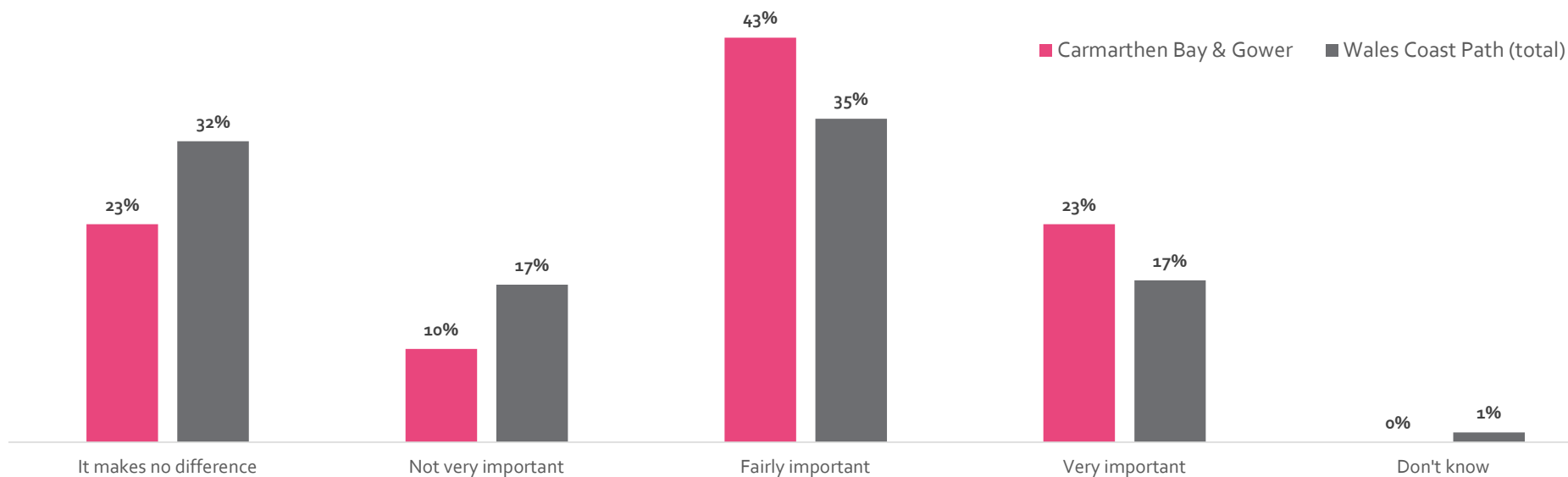
Wales Coast Path - Carmarthen Bay & Gower

Importance of the path to business

Business profiles – path specific

66% of businesses in Carmarthen Bay and Gower state that the path is at least fairly important to the success of their business (compared to 52% of businesses along the Wales Coast Path, nationally). Just 23% state that it doesn't make any difference to the success of their business at all (compared to 32% for the Wales Coast Path in total).

Importance of the path to the success of businesses



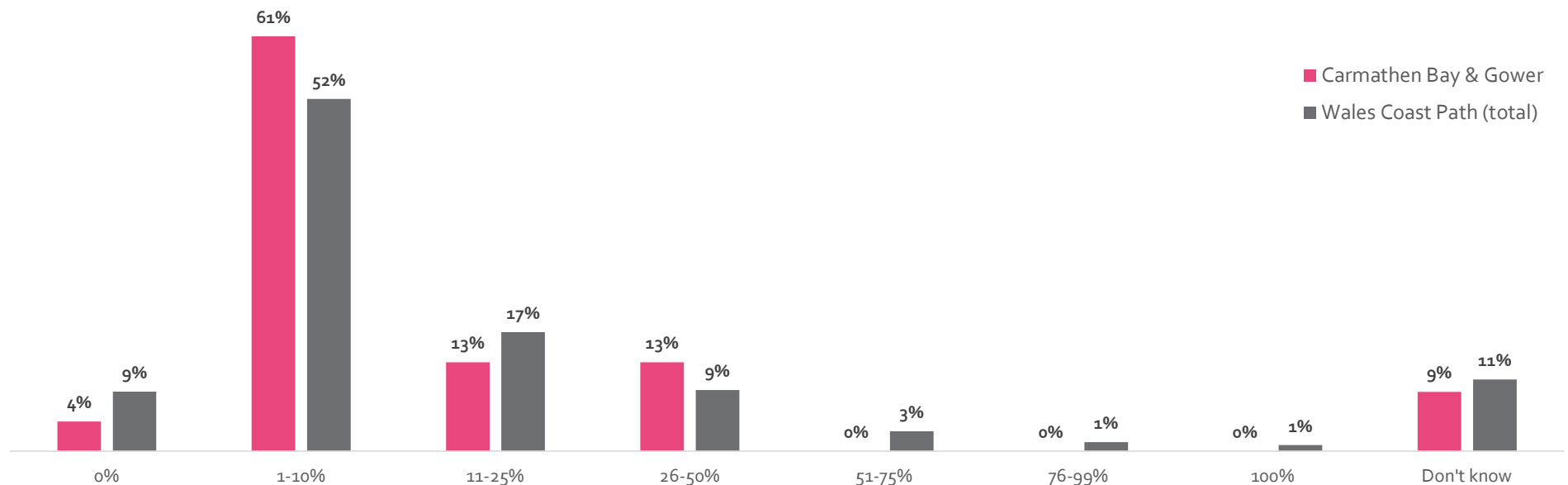
Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path (30).

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 profiles – path specific

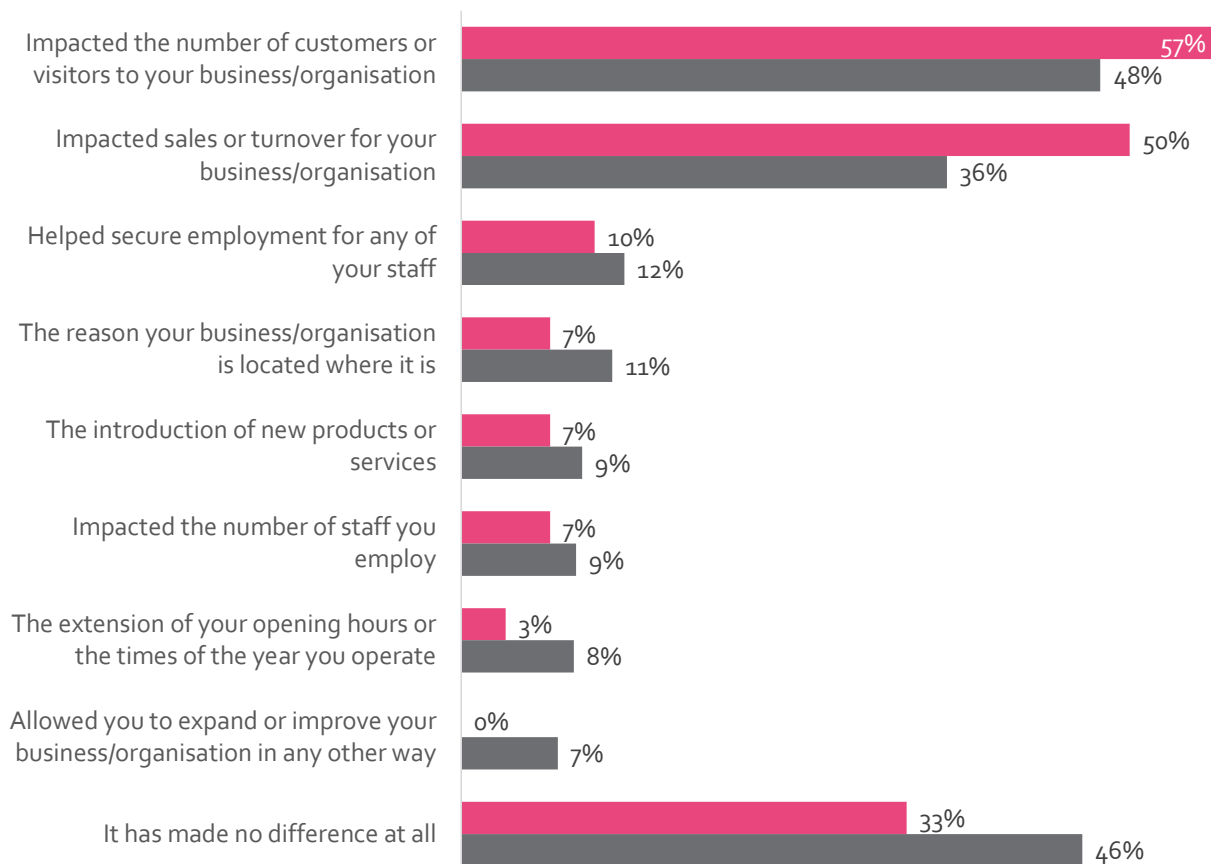
61% of businesses in Carmarthen and Gower that indicate that the Wales Coast Path has some importance to their business state that the path and path users account for 1-10% of their sales/turnover. Another 13% say that the path generates over 25% of their sales/turnover.

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



Base: All businesses assigned to the Wales Coast Path and are operating in Carmarthen Bay and Gower that indicate the path has some importance to their business (23) Q03. What percentage of your sales or turnover is generated by users of the path or can be attributed to its existence in some way? *CAUTION – low base size

Benefit of the path on businesses



57% of the businesses surveyed in Carmarthen Bay and Gower state that the existence of the Wales Coast Path has had some benefit to the number of customers or visitors to their business. This is slightly higher than that of businesses along the Wales Coast Path, nationally (57% v 48%).

Similarly, 50% say that their turnover or sales have been benefitted by the path and the visitors it attracts (v 36% of the Wales Coast Path, nationally).

However, businesses in Carmarthen Bay and Gower are less likely than average to site any of the other potential benefits having affected them.

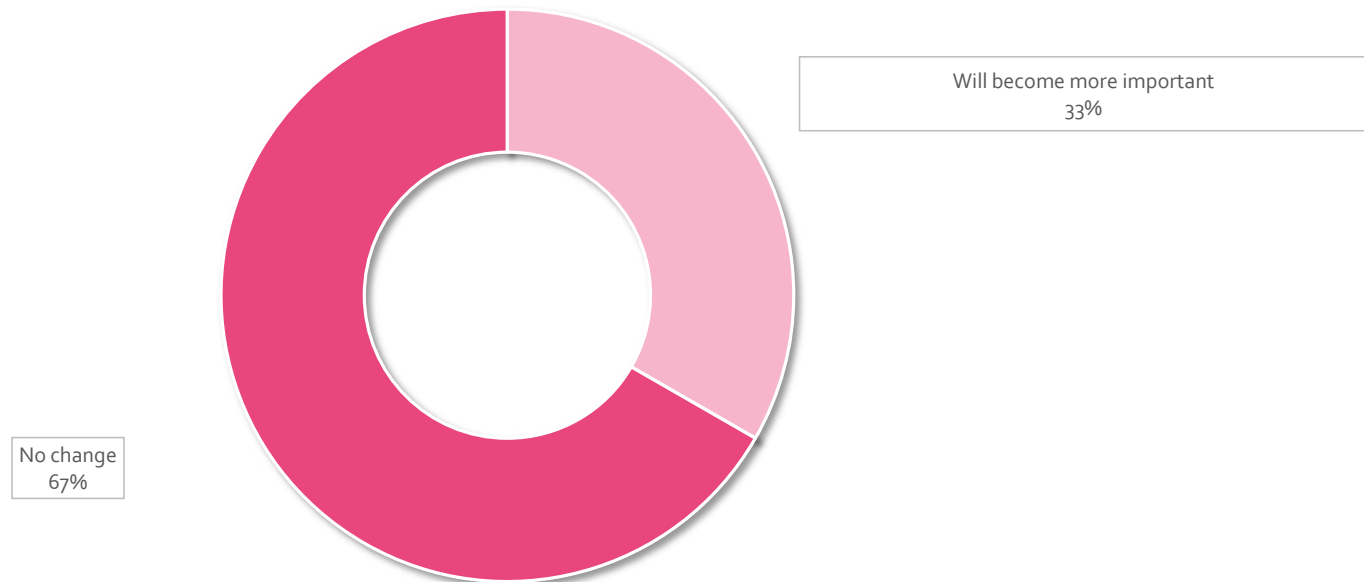
*Note – please compare with caution – the low base size for businesses in Carmarthen Bay & Gower has led to stark but insignificant differences with businesses along the Wales Coast Path nationally.

Base: Businesses assigned to the Wales Coast Path (664) All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path (30).
Q24a. Do you think the presence of the Wales Coast Path has resulted in or contributed to any of the following for your business?

Importance of the path to businesses

33% of businesses in Carmarthen Bay and Gower think the Wales Coast Path will become more important to their success in the future. This compares to just 23% of businesses assigned to the Wales Coast Path, nationally. However, the biggest proportion of businesses foresee no change in the path's importance (67%). Of those who do (n=10), the top reason is that any additional promotion of the path will help to increase tourism. They also suggest that more people will be brought to the area to visit or stay overnight.

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



Base: : All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path (30).

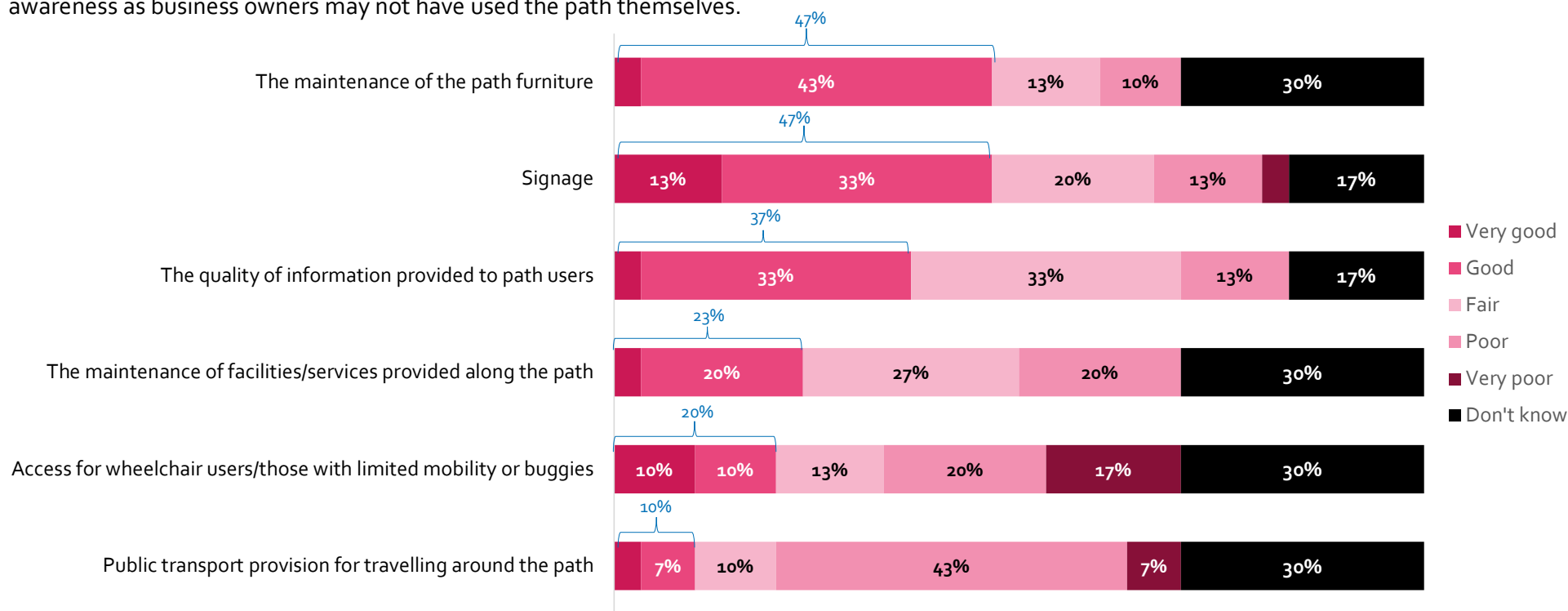
Q25a. Do you consider that in the future there will be any change in the importance of the Wales Coast Path to the success of your business? **Base:** Where path will become more important (10) **Q25b.** Why is that?

Wales Coast Path - Carmarthen Bay & Gower

Path quality

Perceptions of aspects of the path

All businesses were presented with a list of six aspects and asked to rate each one. Of all the aspects rated, businesses are most positive about the maintenance of the path furniture and signage (both 47% good or very good). In contrast, they are least positive about public transportation provision (10% good or very good). However, we do see that a large proportion of businesses say that they don't know, suggesting a lack of awareness as business owners may not have used the path themselves.

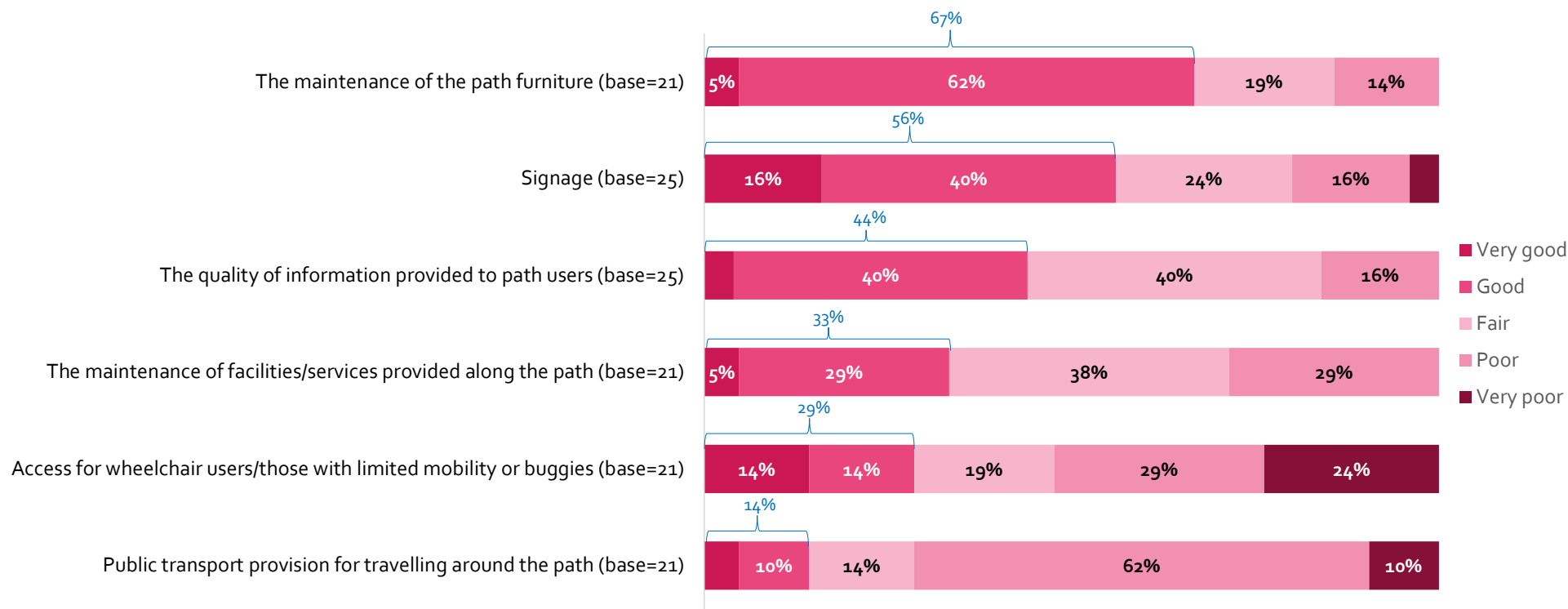


Base: All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path) (30).

Q20: How would you rate each of the following aspects? Data labels <5% not shown

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

When excluding 'don't know' responses, the results are somewhat more positive. 67% of businesses in Carmarthen Bay and Gower now rate the maintenance of path furniture as good or very good, and 56% of businesses who are aware say the same for path signage in the area. However, we also see that 71% feel that public transport provision is poor. This compares to 44% of all businesses along the Wales Coast Path, nationally.



Base: All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path), excluding those answering 'don't know' (base varies with statement – see chart for details).

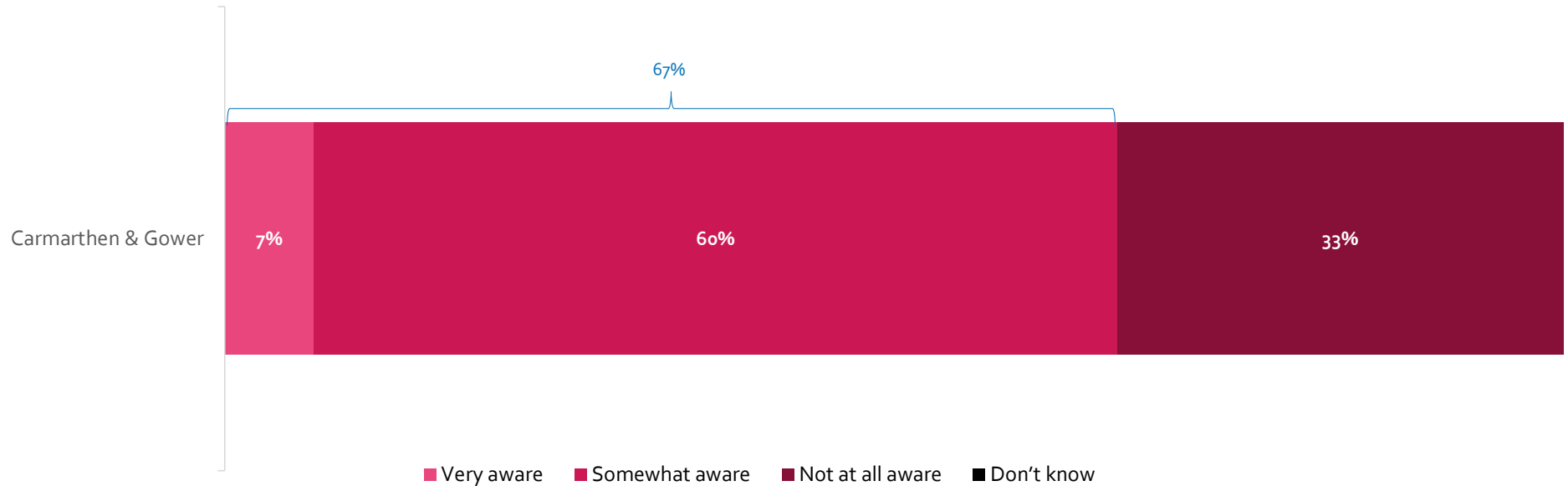
Q2o. How would you rate each of the following aspects? Data labels <5% not shown

Wales Coast Path - Carmarthen Bay & Gower Path promotion



Branding Awareness

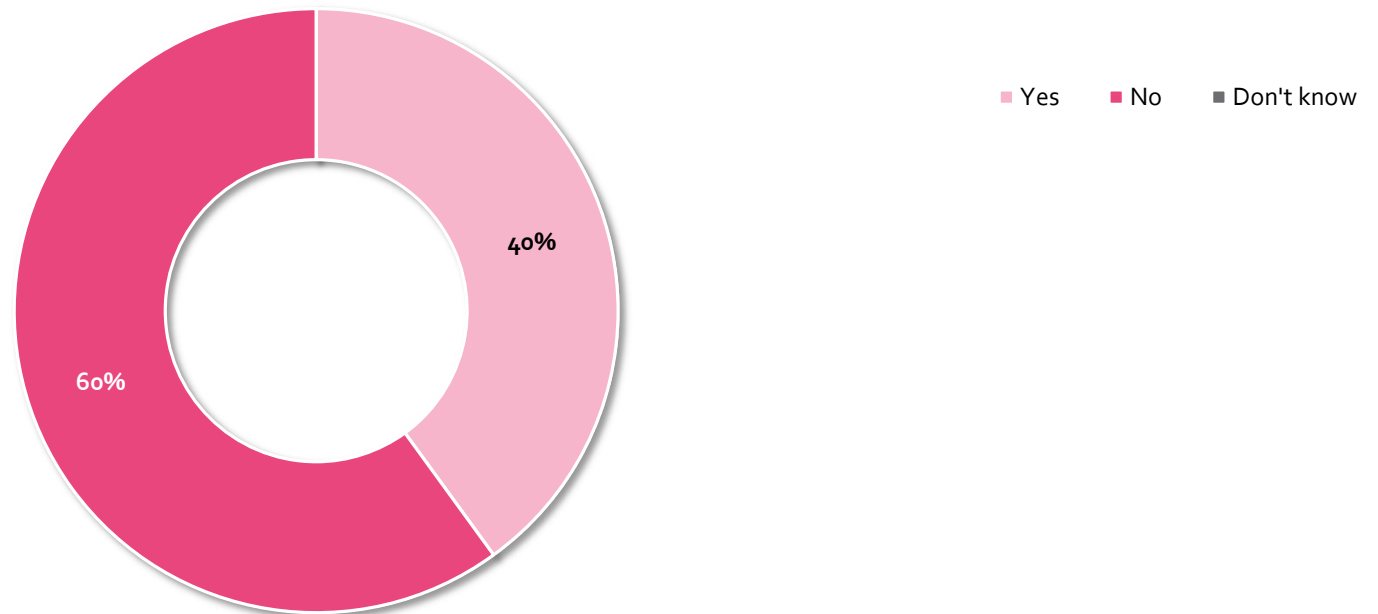
67% of businesses in Carmarthen Bay and Gower have at least some awareness of the path's branding, with 7% of businesses stating they are 'very aware'. However, when those 17 respondents were asked to describe the logo, not all got the details correct. In fact, 41% state that the logo is not memorable.



Advertising awareness

40% of businesses in Carmarthen Bay and Gower have seen some publicity or advertising related to the Wales Coast Path over the last 12 months. This compares to 38% of businesses along the Wales Coast Path, nationally. Of those 12 businesses in Carmarthen Bay and Gower, half mentioned seeing advertising on Facebook.

% seen publicity/advertising*

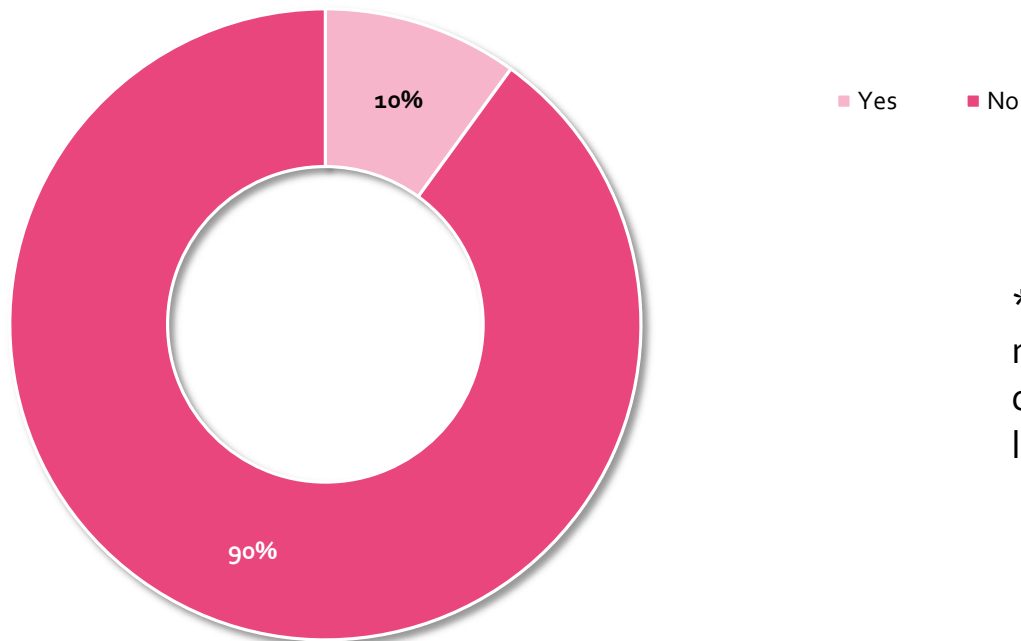


Base: All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path (30). *CAUTION – low base size **Q12**. Over the past year, have you seen or heard any publicity, advertising or information about the Wales Coast Path? **Base:** All respondents who have seen or heard publicity, advertising or information (12)** **Q13**. Please can you tell me where or how you have seen publicity, advertising or information for the Wales Coast Path? *Note – mentions <5% not shown. **CAUTION – very low base size

Receipt of direct communications

Just 10% of businesses recall having received direct communications about the Wales Coast Path in the past year.

% received direct communications



* Please note – the base size for reporting feedback on the direct communications received is too low to analyse at a regional level.

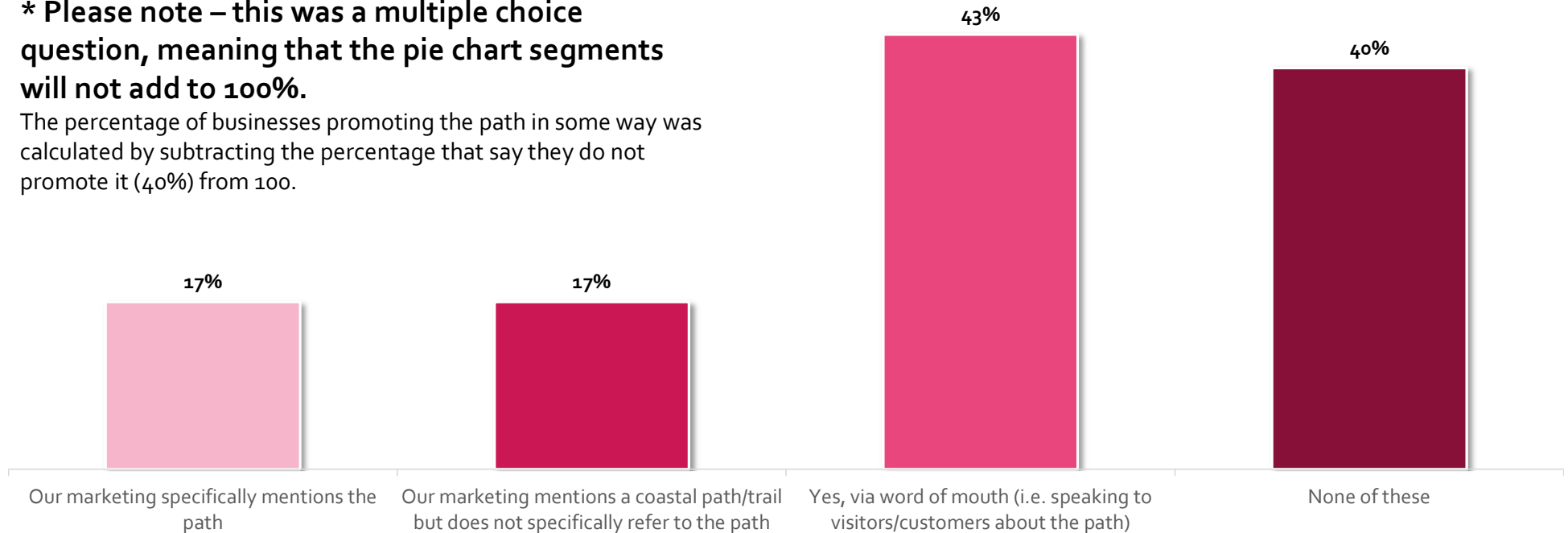
Base: All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path (30).
Q15. Over the past year, do you recall receiving any direct communications about the Wales Coast Path?

Path promotion by businesses

60% of businesses in Carmarthen Bay and Gower promote the Wales Coast Path in some way (v 52% for WCP total), with 17% stating that the path is specifically mentioned in their marketing materials (v 20% for WCP total). A further 43% of businesses promote the path via word-of-mouth (v 40% for WCP total), and 17% mention a path, but not by name (v 9% for WCP total).

*** Please note – this was a multiple choice question, meaning that the pie chart segments 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 (40%) from 100.



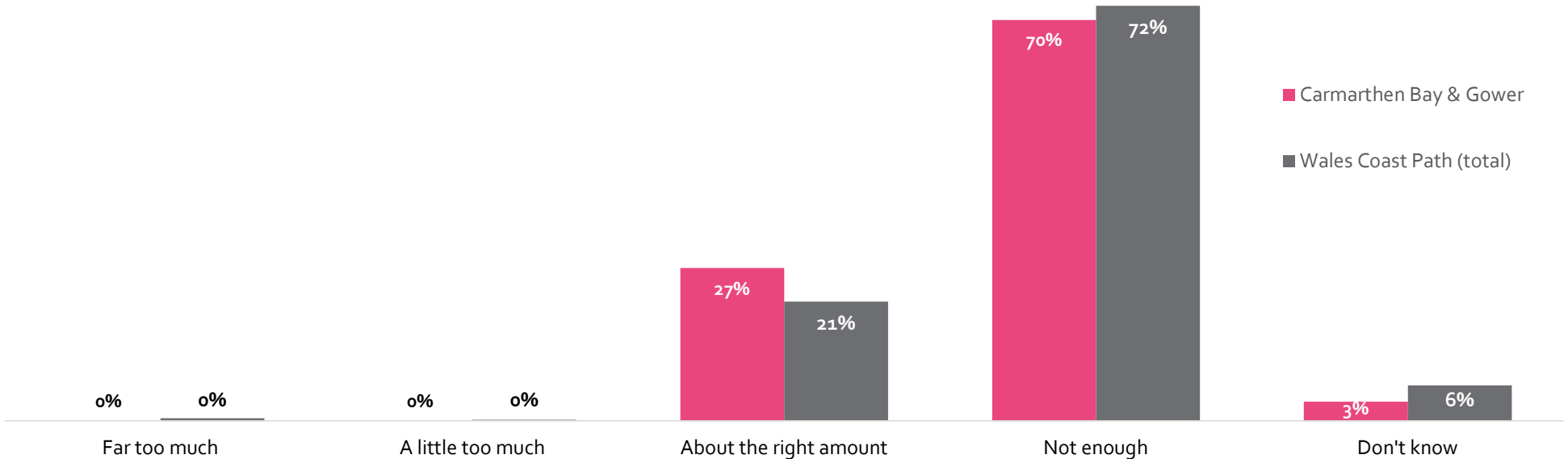
Base: All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path (30).

Q17. Do you mention or promote the Wales Coast Path in any of your own marketing materials, for example on your website or social media channels, or when speaking to your customers?

Path promotion

Whilst 27% of businesses in Carmarthen Bay and Gower think the Wales Coast Path is already promoted enough, a much higher proportion (70%) do not think it is promoted sufficiently. These findings do not significantly differ to those of businesses along the Wales Coast Path, nationally.

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

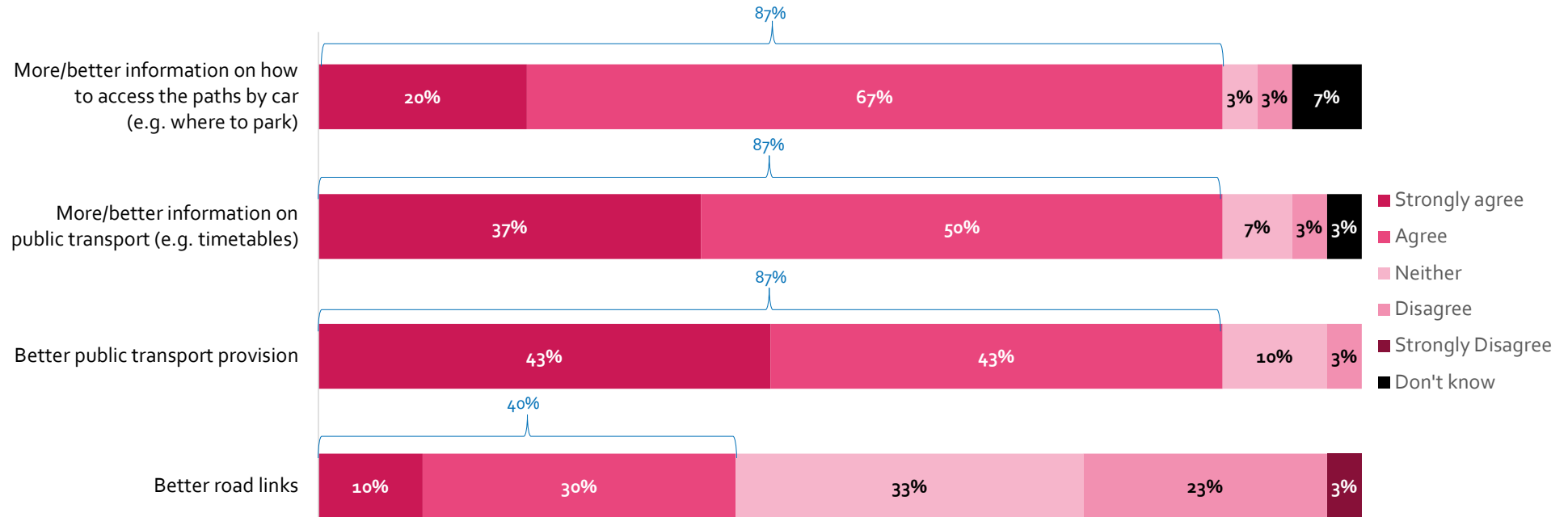


Base: Businesses assigned to the Wales Coast Path (664), All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path) (30).

Q19. Overall, do you think the Wales Coast Path is promoted...?

Encouraging visits

Businesses were presented with four potential improvements to the path and asked to state to what extent they agree or disagree whether they are needed. 87% of businesses in Carmarthen Bay and Gower feel that more/better information on how to access the path by car is needed. This is 10% points higher than the average for all businesses along the Wales Coast Path, nationally (77%). The same proportion of businesses agree that more/better information on public transport is needed, as well as better public transport provision. On a more positive note, only 40% businesses think better road links are needed.

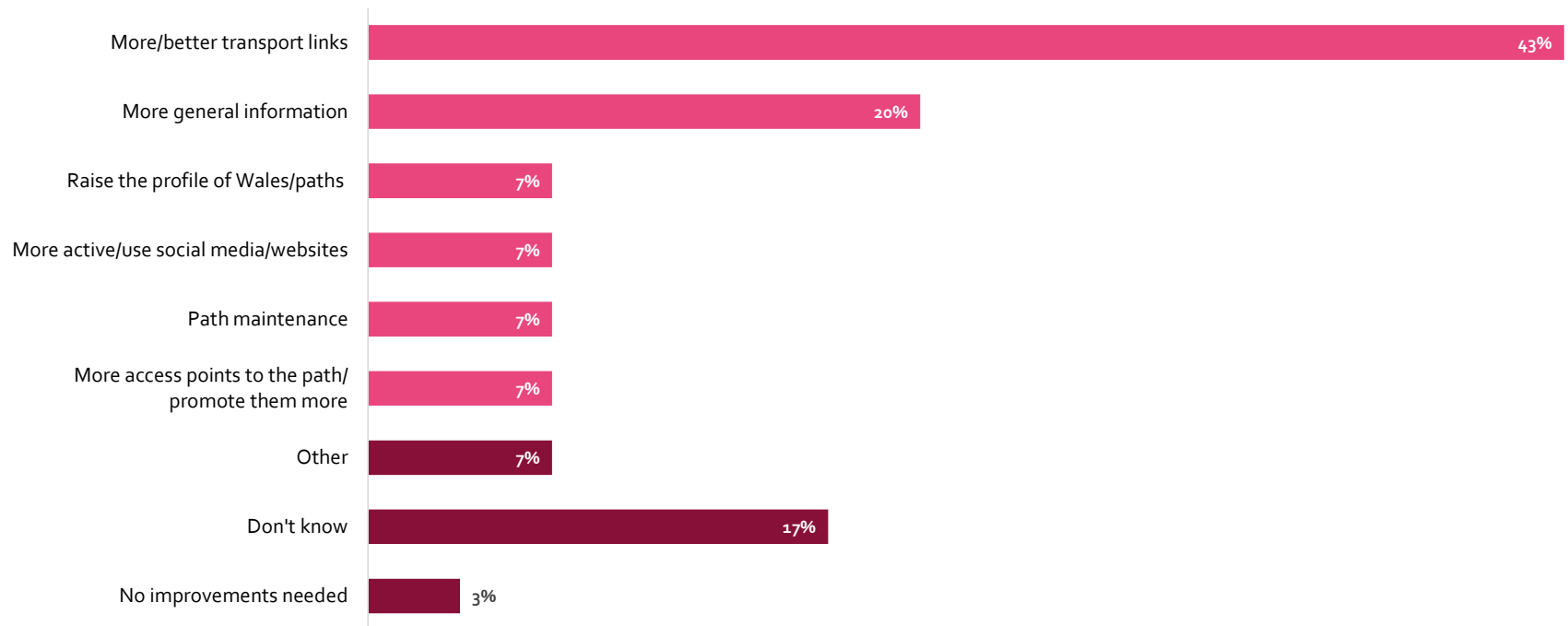


Base: All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path) (30).

Q21. To what extent, do you agree or disagree that each following are needed to encourage more people to visit the Wales Coast Path? *Note – data labels <3% not show for neatness.

Improving access

When asked in an open question what improvements are necessary to improve access, businesses' top recommendation for the Wales Coast Path in Carmarthen Bay and Gower is to improve transport links, with 43% making this a priority. Additionally, 20% feel that more general information about the path is needed to help more customers travel around the path.

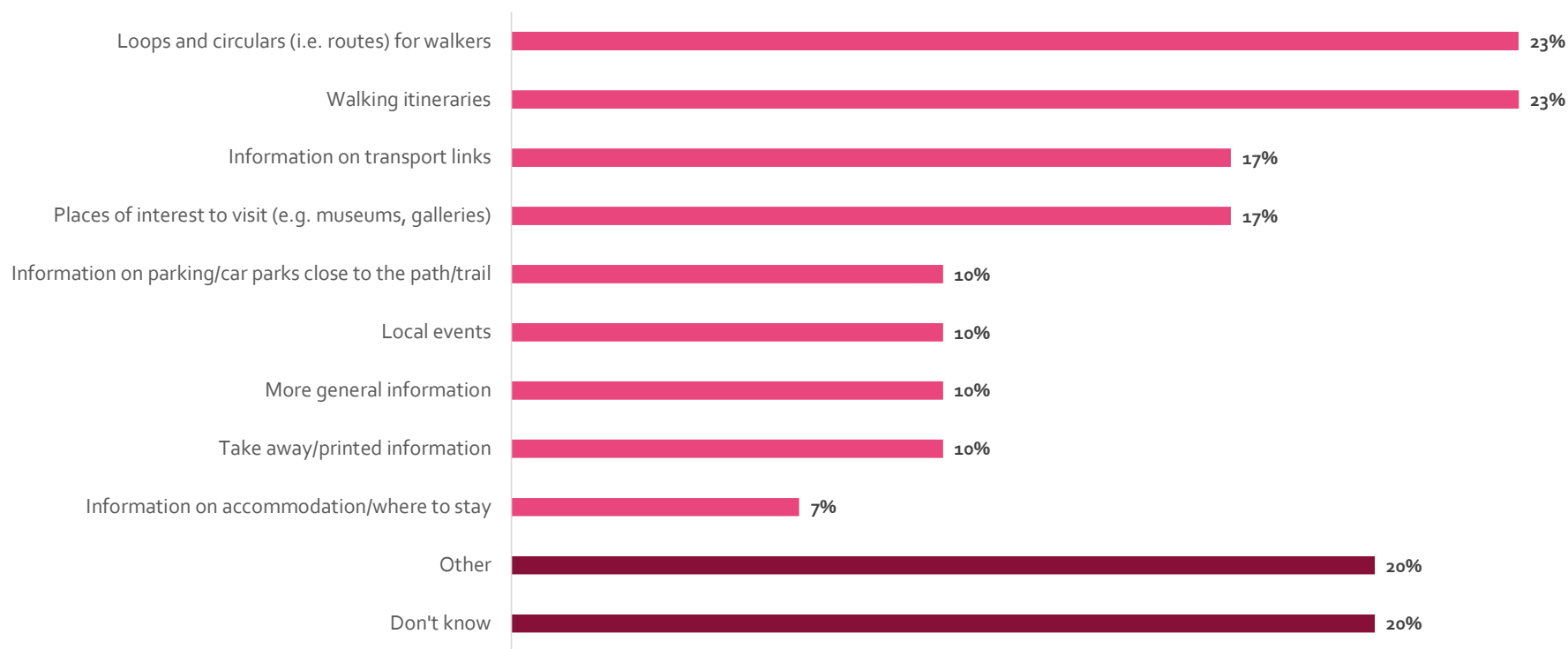


Base: All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path) (30).

Q22. What improvements (if any), do you think are needed to help more customers/visitors travel around or access the paths? *note – mentions <5% not shown.

Information to support business customers/path users

The information that businesses in Carmarthen Bay and Gower believe that their customers would find the most beneficial relate to loops and circulars (routes) and itineraries for walkers (both mentioned by 23% of these businesses). This prioritisation is in line with the findings for the Wales Coast Path, nationally.



Base: All businesses located in the Carmarthen Bay & Gower visitor region (and also assigned to the Wales Coast Path) (30).

Q30. What kind of information do you think would be most helpful to your customers or other users of the Wales Coast Path or National Trails? *Note – mentions <5% not shown

Wales Coast Path - Carmarthen Bay & Gower

Conclusions and recommendations

Conclusions


The Wales Coast Path significantly contributes to the success of local businesses in Carmarthen Bay and Gower.

67% of businesses in this region benefit from the path, with 66% stating it is fairly or very important to their success.


Branding awareness provides a foundation for stronger promotion. Whilst 67% of businesses are aware of the branding, 41% find the logo unmemorable. Furthermore, 70% of businesses feel the path is not promoted sufficiently. Therefore, there is significant potential to make the logo and promotional efforts more engaging and memorable.

Improving transport links could unlock greater accessibility for visitors. 71% of businesses believe public transport provision is poor, and 87% agree more/better public transport information is needed.


Recommendations



To take advantage of this, partner with local businesses to create collaborative promotions or discounts for path users. For example, offer "path-friendly" packages that include discounts on refreshments, accommodations, or gear. This could encourage mutual promotion and increase footfall to both the path and local businesses.



Focus on improving the visibility and appeal of branding through affordable local campaigns. For example, create small-scale social media contests encouraging visitors to share photos with the path logo. Pair this with better-designed and strategically placed materials like leaflets and posters at visitor centres, cafes, and accommodations.



Develop and distribute simple guides with public transport options tailored for path access. Include details like bus stops, routes, and timetables in marketing materials and on business websites. Work with transport providers to promote "path shuttle" services during peak seasons, if feasible.


Conclusions

There is strong demand for enhanced walking experiences, such as circular routes.


Businesses see value in providing practical resources like circular walking routes and tailored itineraries, which can enhance visitors' enjoyment of the path.

Businesses are already promoting the path, but there's room to make it a greater focus. Whilst 60% of businesses promote the path in some capacity, it is rarely a prominent feature in their marketing materials. Therefore, there is clear potential to elevate its presence in marketing efforts.

Recommendations



If not already available, consider creating detailed walking itineraries and maps, focusing on circular routes near key attractions. Include estimated times, difficulty levels, and nearby amenities. These could be shared digitally and through local establishments to improve visitor experience.



Equip businesses with ready-to-use marketing tools, such as high-quality visuals and descriptive content, to integrate the Wales Coast Path more prominently into their branding. Encourage storytelling approaches to make the path a central part of their promotional narratives.

For more information

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