

The Wales Coast Path

Business Survey 2024

Julie Hollingsworth, Associate Director
jhollingsworth@djsresearch.com

Clare Rapkins, Senior Research Manager
crapkins@djsresearch.com

Emily Ward, Senior Research Executive
eward@djsresearch.com



Contents

- 3 Background and methodology
- 6 Business profiles
- 11 Importance of the path to business
- 17 Path quality
- 20 Path promotion
- 32 Conclusions and recommendations



The Wales Coast Path

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 impact of the **Wales Coast Path**.

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 **664** 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 be greater than +/-1% point.

Base sizes

Please note, the base sizes included are the total number of people who responded to a particular question. As not everyone answered all questions, the base for individual questions may be lower than the total number of respondents who responded to the survey and were assigned to the Wales Coast Path, including Pembrokeshire Coast Path overall (664).

Definition of 'Assigned' path

After answering a series of screening questions to determine the proximity (So2a, So2b) and importance of routes to individual businesses (So3, Qo1 and Qo2), businesses were assigned a path and asked to respond to the remaining survey questions based on their 'assigned' path. In instances where businesses were located close to or benefitted from more than one path/trail, they were assigned to the one which either a) generated the highest proportion of sales/turnover or b) they are most reliant on for their business.

Comparison to 'total' values

In this report, results for the Wales Coast Path are compared to the average figures from the total sample for all routes. The total sample includes businesses linked to the Wales Coast Path, Pembrokeshire Coast Path, Offa's Dyke Path and Glyndŵr's Way National Trails. The combined average is labeled as "All surveyed routes" in the comparison charts.

Benchmarking

As part of the report, we have compared findings where relevant with a previous study from 2013. However, significant differences in focus and methodologies limit direct comparisons. The 2013 study assessed the economic impact of the Wales Coast Path, focusing on metrics such as job creation and evaluating the path'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 like 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 the earlier studies.

Additionally, since the previous survey was conducted over a decade ago, the business landscape and visitor behaviour within the tourism sector have likely evolved. The Wales Coast Path has evolved from an emerging tourism asset in 2013 to a mature and integrated part of Wales' tourism landscape by 2024. As such, while 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.

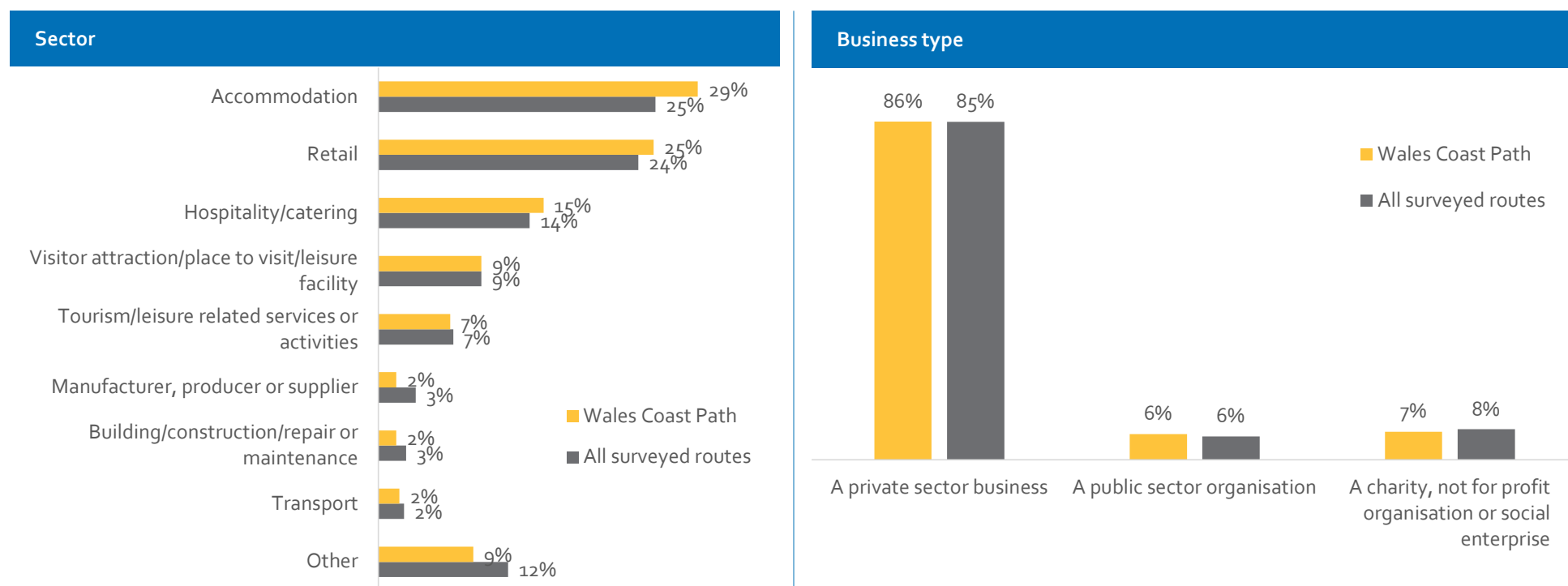
Pembrokeshire Coast Path is classified as a National Trail but also forms part of the Wales Coast Path. For this reason, businesses that have been assigned to Pembrokeshire Coast Path are included in both the individual path results and the Wales Coast Path results. Throughout this report, when referring to the Wales Coast Path, we are referencing the Wales Coast Path including the Pembrokeshire Coast Path.

The Wales Coast Path Business Profiles



Business profiles (I)

The 664 businesses along the Wales Coast Path represented a range of sectors, with 54% in the accommodation or retail sectors. A further 14% work in the hospitality and catering sector. Overall, 86% of businesses are in the private sector.

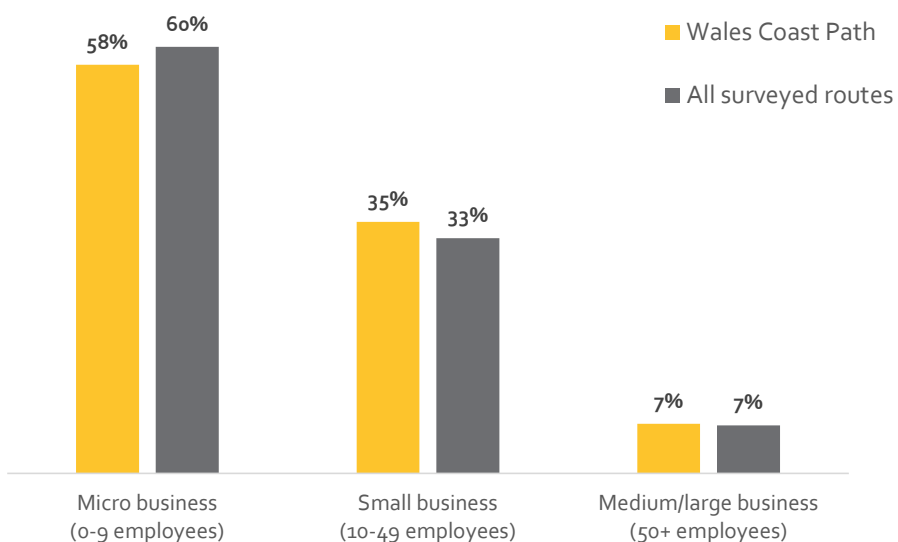


Base: Businesses assigned to the Wales Coast Path (664). **Qo5B.** Which of the following best summarises your main business's activities? **Co1.** Which one of the following best describes your business?

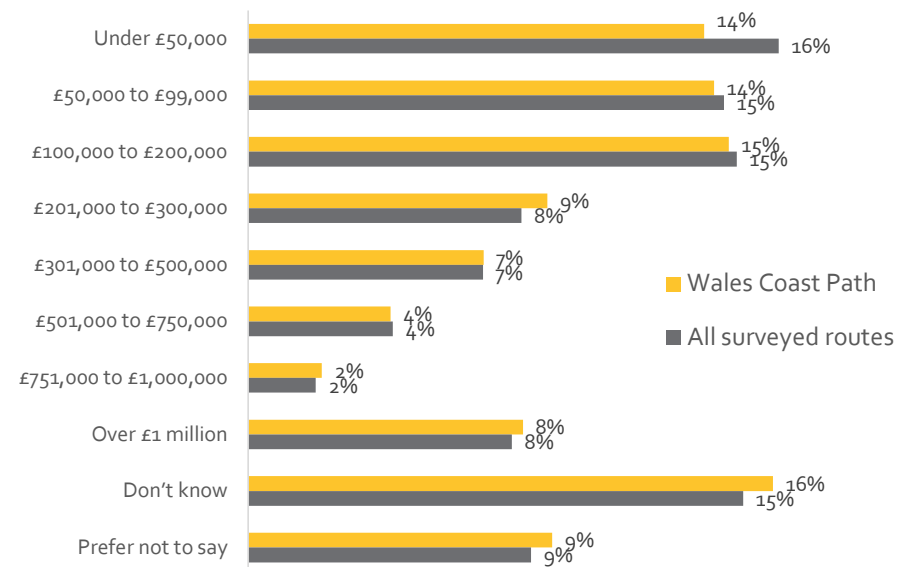
Business profiles (II)

Most of the businesses along the Wales Coast Path employ less than 50 staff members. Micro businesses with a workforce of 0-9 employees make up 58% of businesses assigned to the path. Another 35% are small businesses with 10-49 employees. Moreover, 52% of businesses have a turnover of £300,000 or less.

Business size



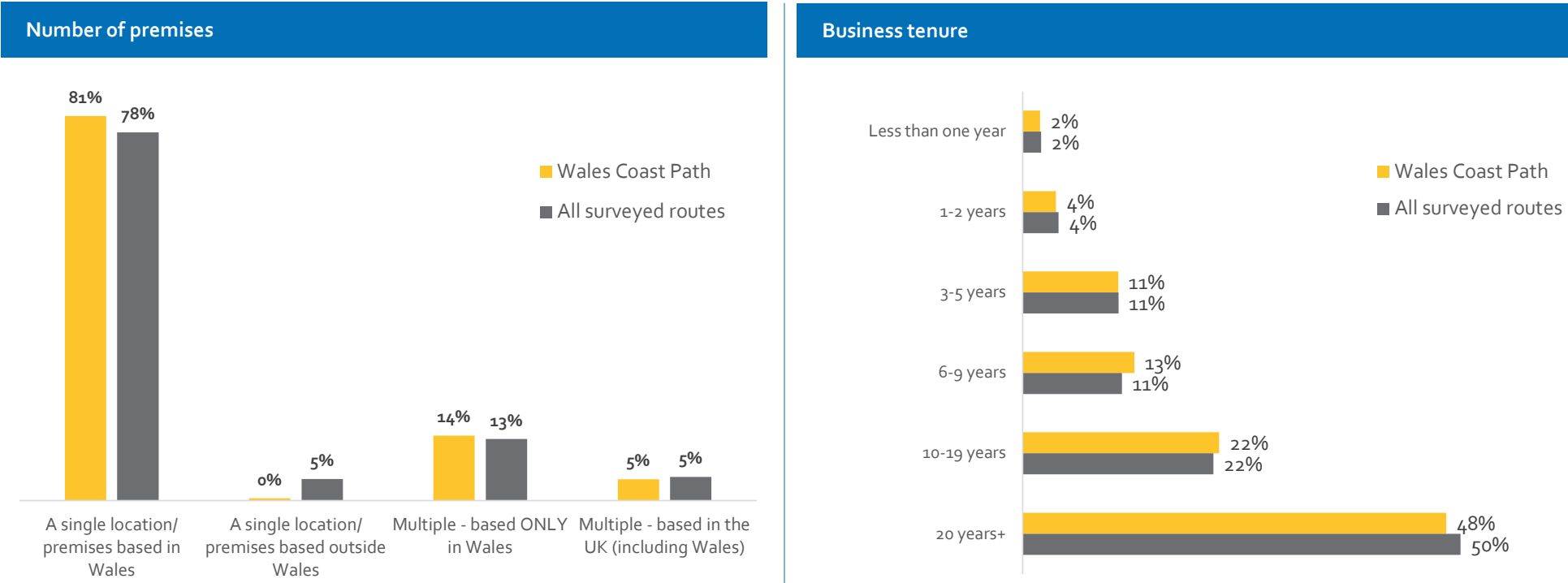
Turnover



Base: Businesses assigned to the Wales Coast Path (664) **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)

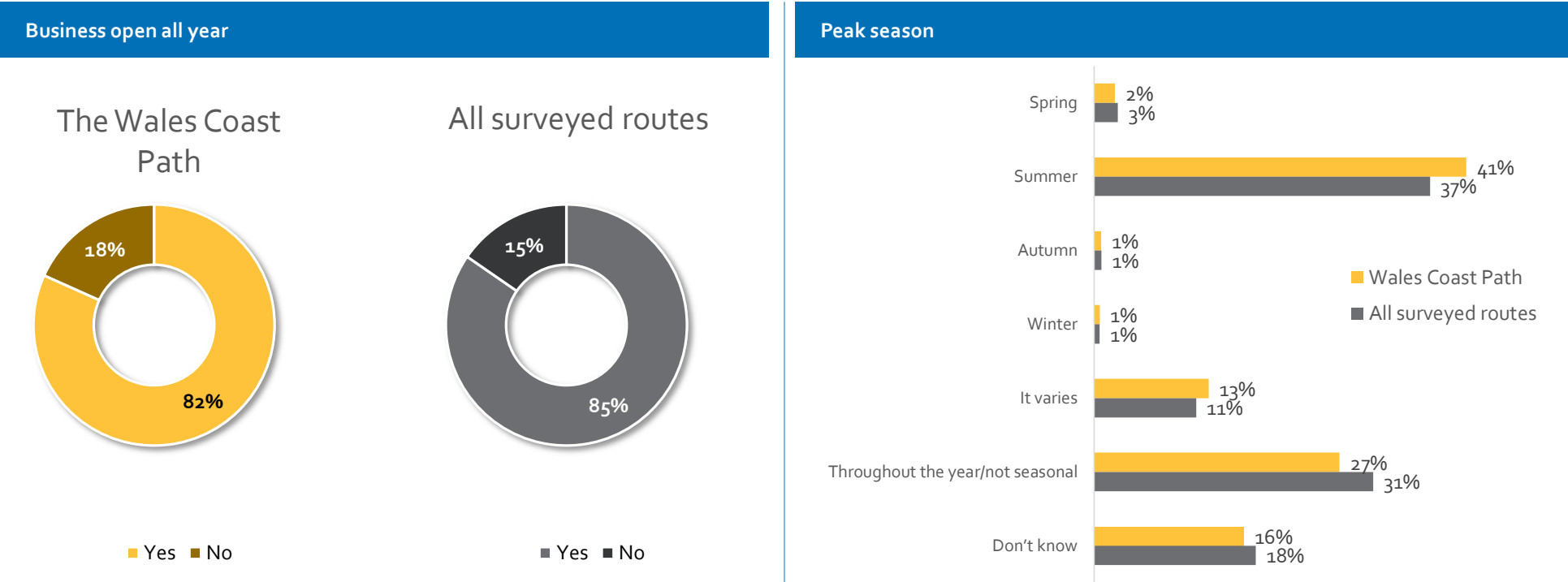
Businesses along the Wales Coast Path range in terms of tenure. 48% have been established for 20+ years, whereas a small proportion have opened within the last couple of years (6% have been open 2 years or less). 81% of these businesses operate from a single location within Wales, with a further 14% having multiple premises within Wales.



Base: Businesses assigned to the Wales Coast Path (664). 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)

82% of businesses along the Wales Coast Path are open all year round. Business is most likely to peak during the summer months for 41% of businesses, whilst another 27% state their business is not seasonal at all.



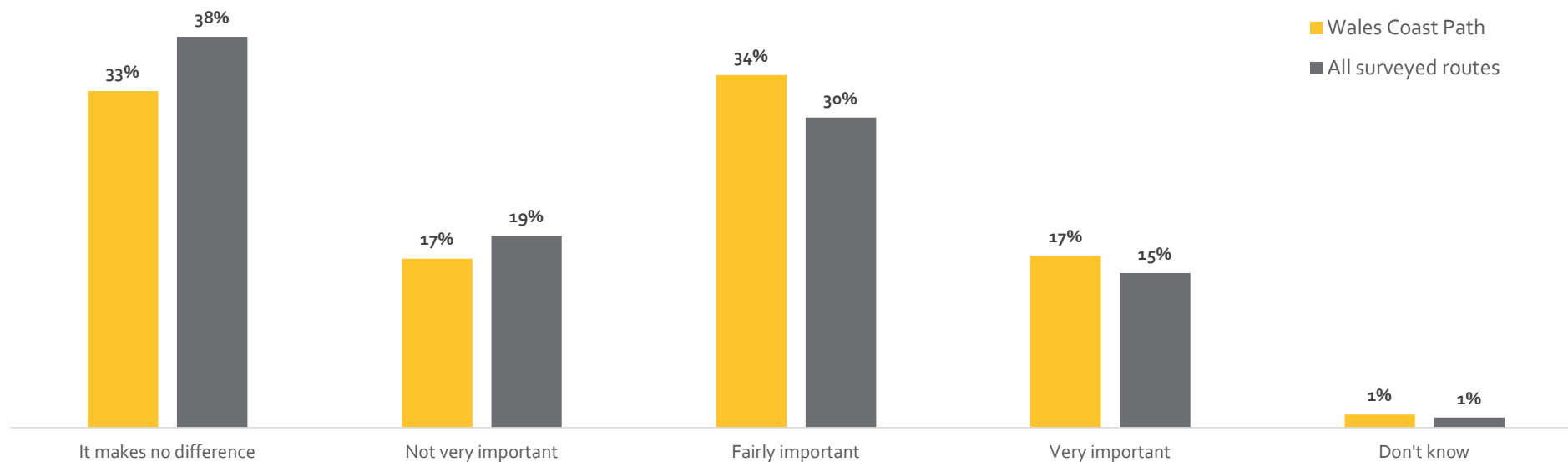
The Wales Coast Path

Importance of the path to business

Business profiles – path specific (I)

39% of businesses along the Wales Coast Path gain some form of benefit from the path's existence. Over half of businesses consider the path to be 'important' to the success of their business, with 17% stating that it is very important. In contrast, 33% say that the path does not benefit the success of their business at all, although this is 5% points lower than the average for all routes (38%).

Importance of path to the success of businesses

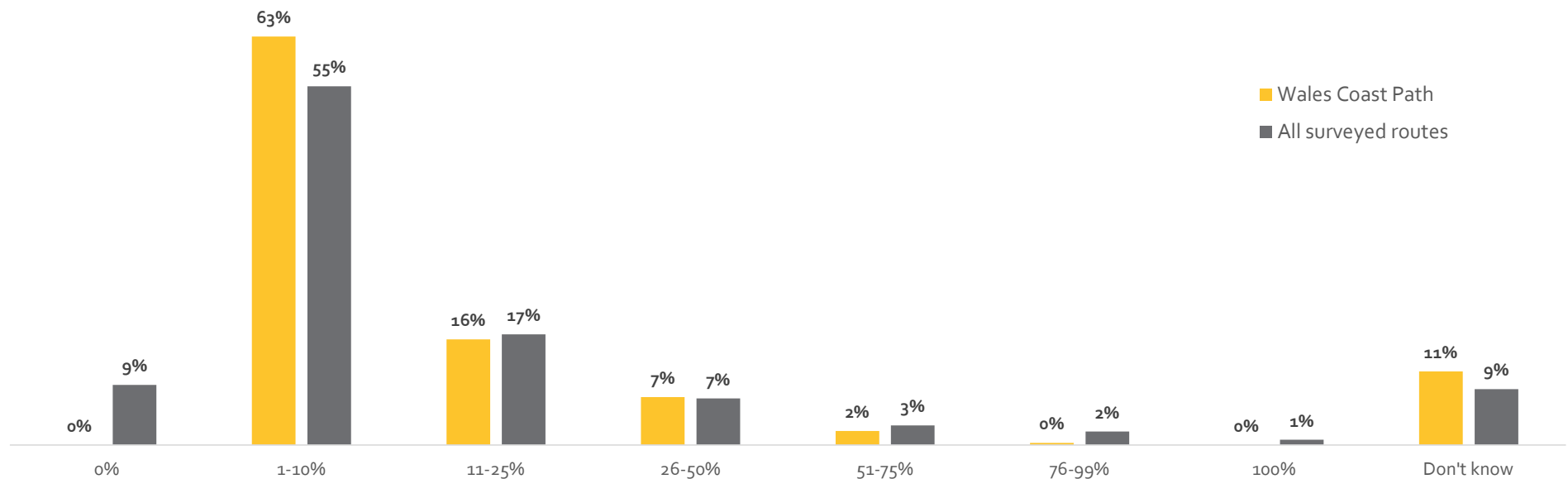


Base: Businesses assigned to the Wales Coast Path (664) **Q02.** How would you describe the importance of the Wales Coast Path to the success of your business?

Business profiles – path specific (II)

89% of businesses that indicate that the Wales Coast Path has some importance to their business state that the path and path users account for part of their turnover. Specifically, 63% say it generates 1-10% of sales/turnover, and 10% say that the path generates over 25% of their sales/turnover.

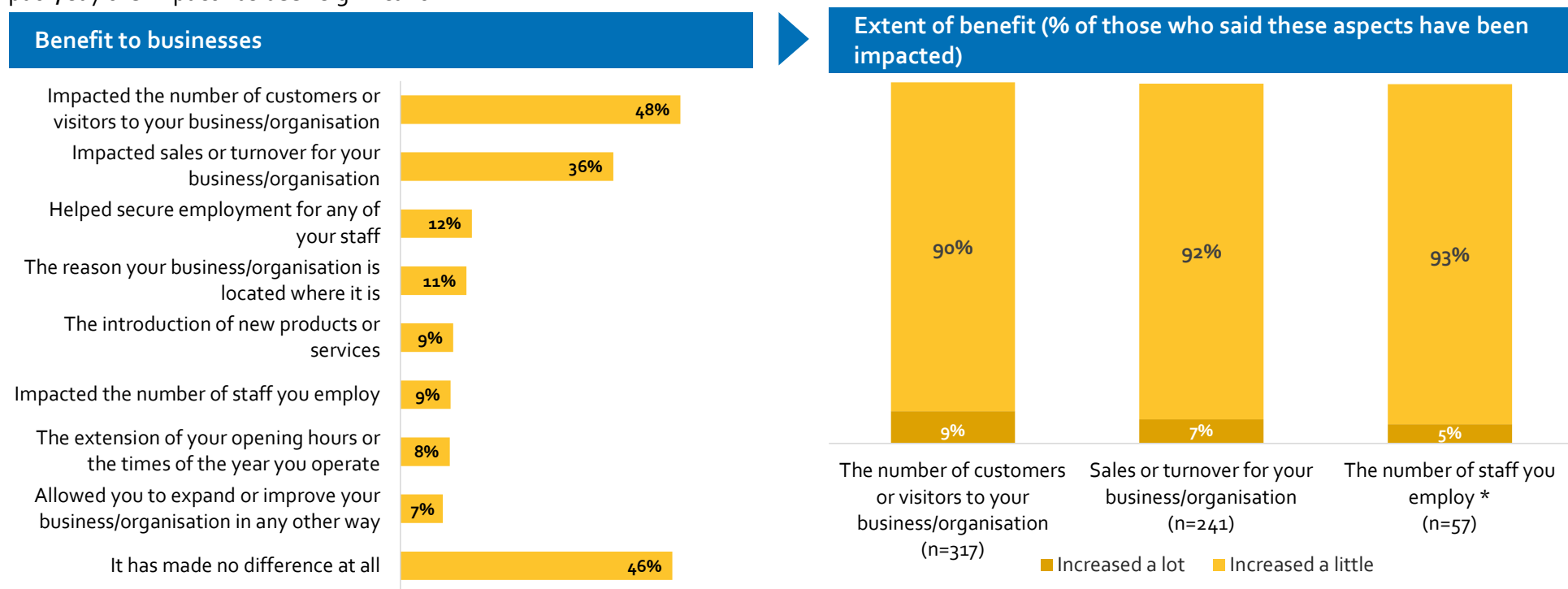
Percentage of sales/turnover generated by path users/existence of path



Base: Businesses that indicate that the Wales has some importance to their business (664) **Q03.** What percentage of your sales or turnover is generated by users of the Wales Coast Path or can be attributed to their existence in some way?

Benefits of the path to businesses

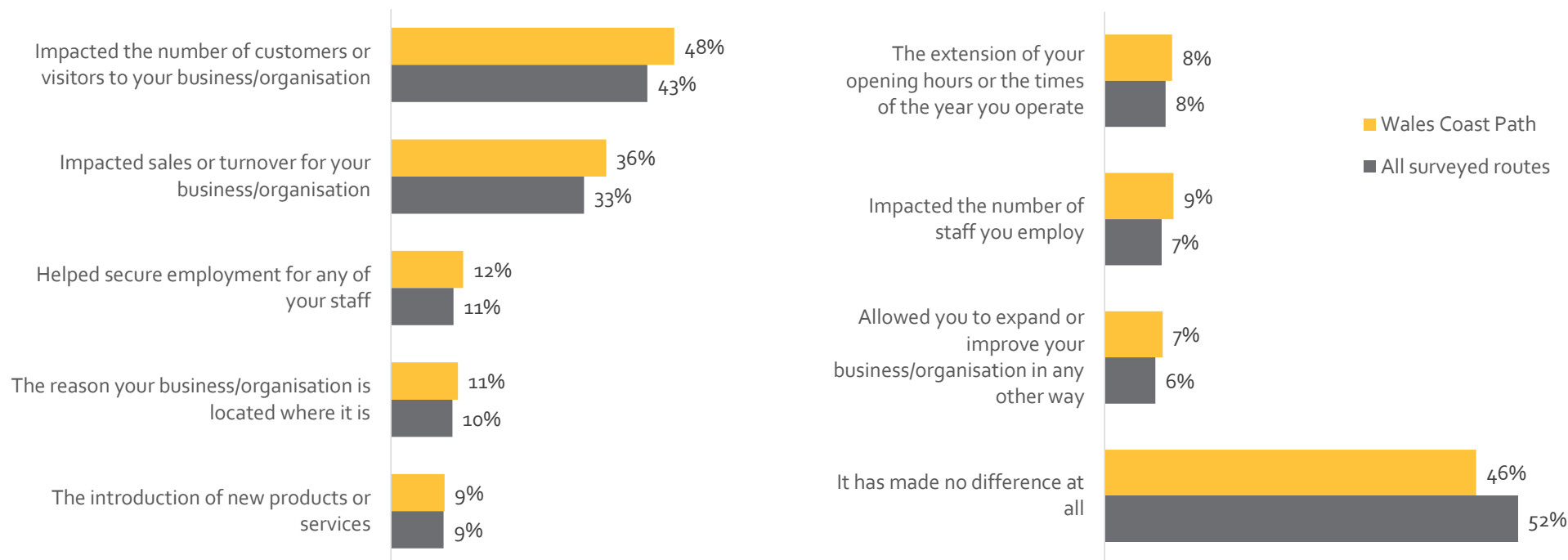
Businesses along the Wales Coast Path are significantly more likely than average to say that the path has made some difference to their business (54% v 48% total). Increased visitors and sales are the greatest benefits cited. Moreover, the increase in visitors is more beneficial now than in 2013, where just 23% reported that there had been an effect. However, in 2013, 16% reported having introduced new services as a result of the path, which is almost double the value reporting the same today (9%). Between 5-9% of businesses that have cited an increase in customers, sales or staff as a result of the path, say the impact has been significant.



Base: All businesses assigned to the Wales Coast Path (664) **Q24a.** Do you think the presence of the Wales Coast Path has resulted in or contributed to any of the following for your business? **Base:** Where each have been impacted at Q24a_4-6/1 (Base size varies by statement) **Q24b.** To what extent has the presence of the Wales Coast Path impacted the following? *Note – data labels <5% not shown for neatness. *CAUTION – low base size

Benefits of the path to businesses – versus total

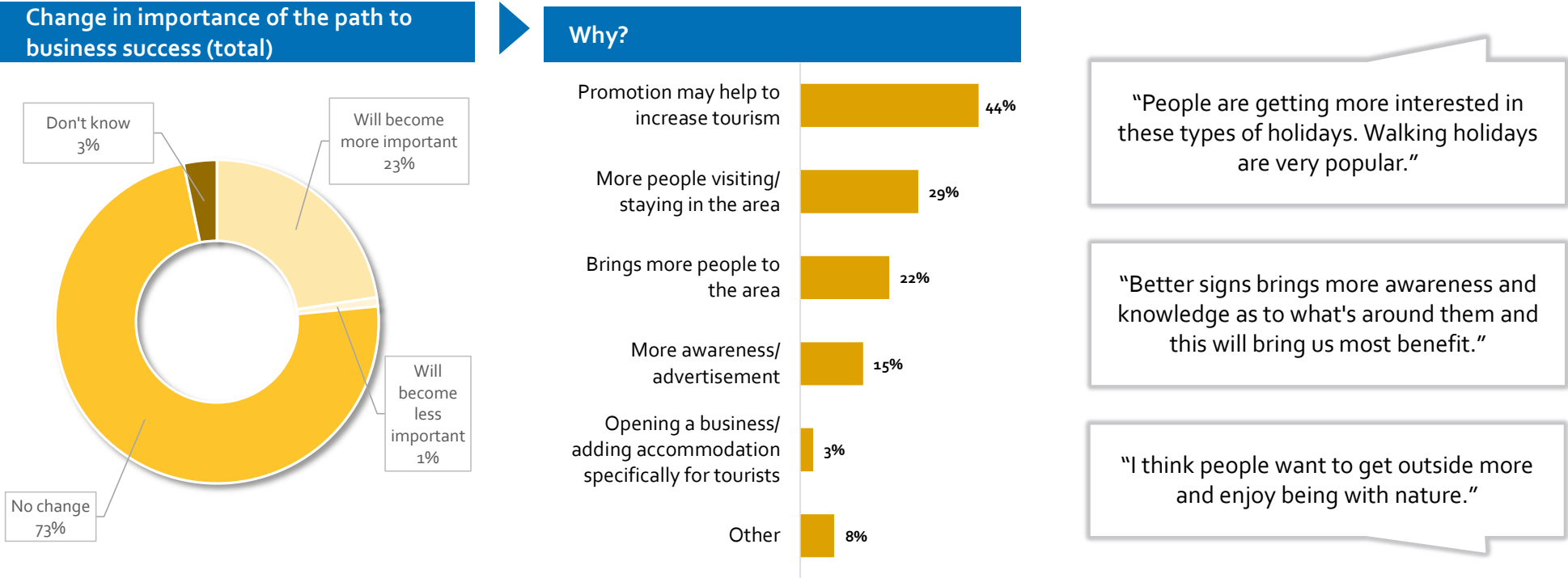
48% of businesses agree that the presence of the Wales Coast Path has increased the number of visitors to their business, with 36% also stating that it has increased their turnover. 12% of businesses state that they have secured employment for staff members, have decided on the location of their business (11%) and/or they have introduced new products/services (9%) as a result of their proximity to the Wales Coast Path. Overall, the percentage of businesses stating that the Wales Coast Path has **some** benefit to their businesses is 6% points higher than the average for all businesses surveyed (54% v 48% total).



Base: All businesses assigned to the Wales Coast Path (664) 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

23% of businesses think the Wales Coast Path will become more important to their success in the future, mainly because of the potential increase in tourism due to path promotion (44%). This compares with 40% of businesses aware of the Wales Coast Path in the 2013 survey thinking the path would become more important, suggesting businesses may have already maximised the potential or they now predict less change.



Base: All businesses assigned to the Wales Coast Path (664) **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 (156) **Q25b.** Why is that?

16

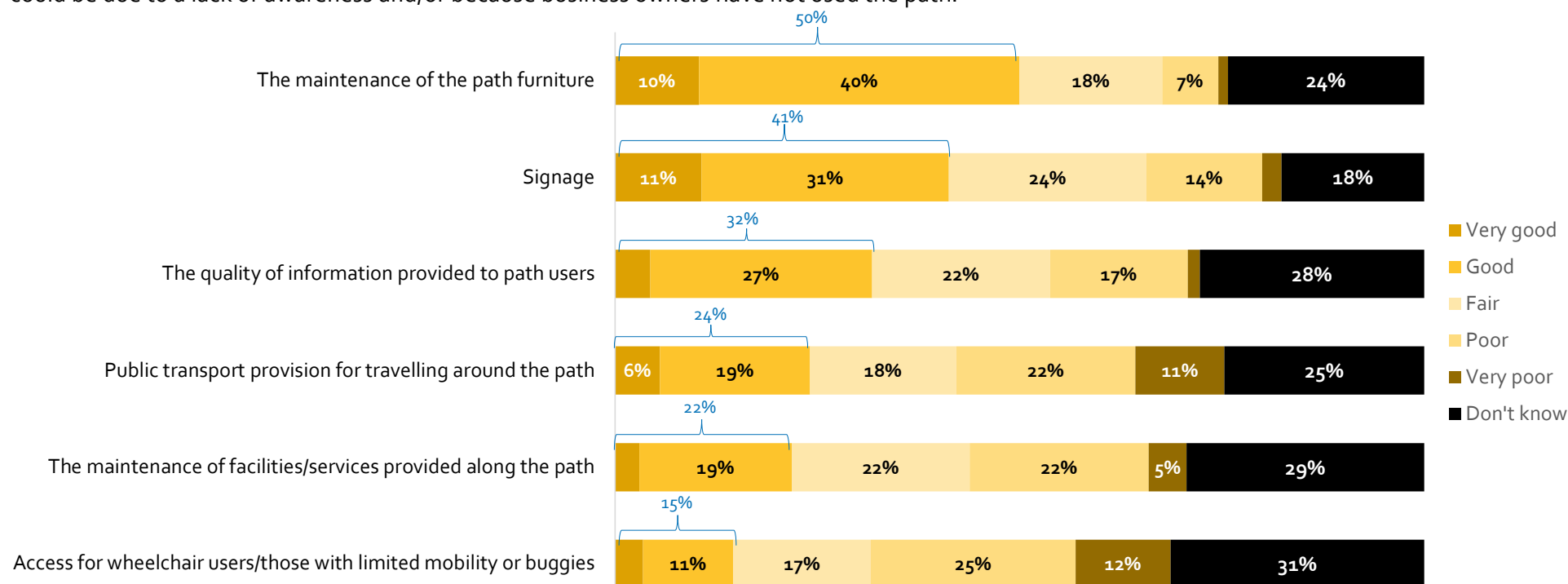
The Wales Coast Path

Path quality



Perceptions of aspects of the path

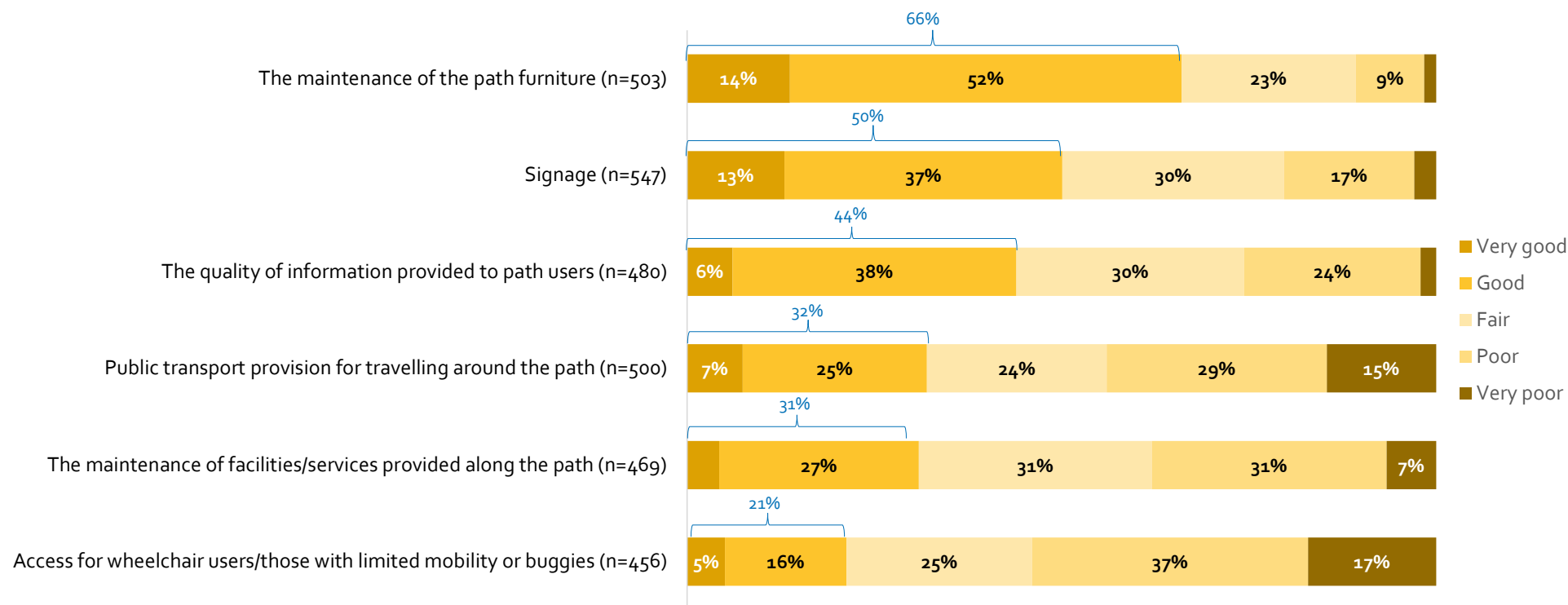
All businesses were presented with a list of six aspects and asked to rate each one. Of all the aspects rated, businesses are most positive with the maintenance of the path furniture (50% good/very good) and signage (41% good/very good). In contrast, they are least positive about the accessibility of the path (15% good/very good). However, we do see that 31% of businesses say that they don't know with regards to access. This could be due to a lack of awareness and/or because business owners have not used the path.



Base: All businesses assigned to Wales Coast Path (664)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

Removing 'don't know' responses reveals a more positive story. Of those who **are aware**, 66% believe that the maintenance of path furniture is good/very good. 50% also speak positively about signage for the Wales Coast Path. Though accessibility is still rated lowest, 21% of respondents who are aware rated this highly (6% points higher than the figure where don't know responses were included).



Base: All businesses assigned to Wales Coast Path – excluding 'don't know' responses **Q20.** How would you rate each of the following aspects? Data labels <5% not shown. Base size varies by statement due to the removal of don't know responses.

The Wales Coast Path

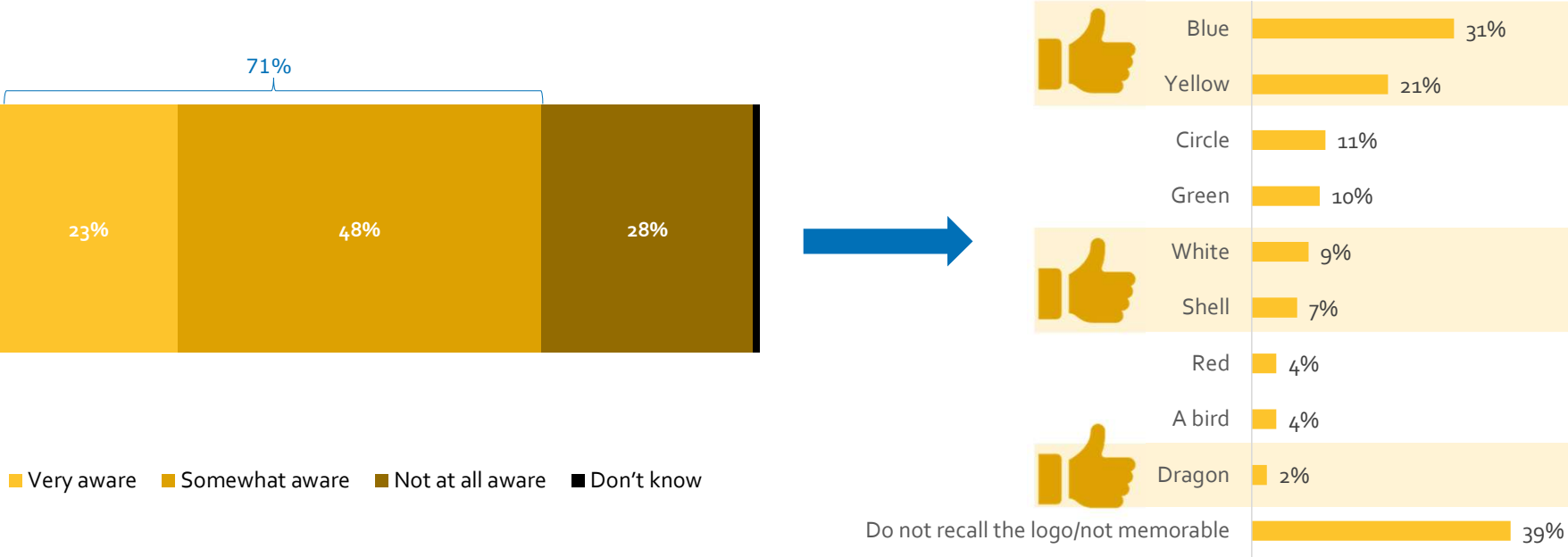
Path promotion



Llwybr Arfordir Cymru
Wales Coast Path

Branding Awareness

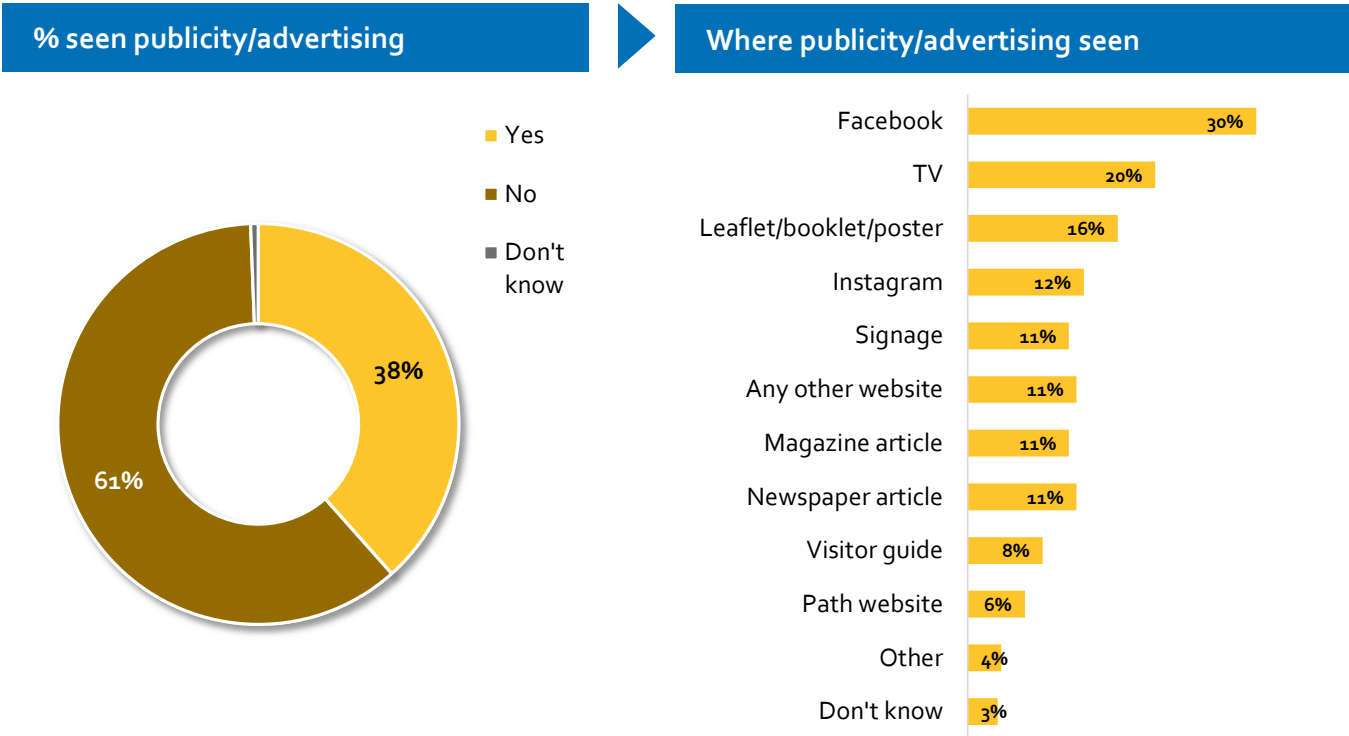
71% of businesses along the Wales Coast Path have at least some awareness of the path's branding, with 23% of businesses stating they are 'very aware'. However, when those respondents were asked to describe the logo, not all got the details correct. 31% correctly stated that the logo is blue, and 21% say that it is yellow, but only 7% correctly stated that the logo represents a shell. Furthermore, 39% state that the logo is not memorable.



Base: All businesses assigned to the Wales Coast Path (664) **Q10.** To what extent are you aware of the branding for the Wales Coast Path or how it's promoted? **Base:** All businesses who are aware of the branding for the Wales Coast Path or how it's promoted (348) **Q11.** How would you describe the branding (i.e. logo) of the Wales Coast Path?

Advertising awareness

38% of businesses along the Wales Coast Path have seen some publicity or advertising related to the path over the last 12 months. However, this is a drop of 25% points since 2013, when 63% of businesses along the Wales Coast Path had encountered publicity or advertising about the path.



Advertising is most likely to have been seen via Facebook (30%), followed by TV (20%), leaflet or booklet (16%) and Instagram (12%).

This also differs from past findings.

In 2013, the most likely places to have come across publicity were on TV (43%), in a newspaper article (24%) or in a leaflet or booklet (16%).

This indicates a clear rise in social media advertising, and viewership of promotion on digital platforms. Similarly, the public are less likely to see advertising in printed materials than ten years ago.

EW0

Base: All businesses assigned to the Wales Coast Path (664) **Q12.** Over the past year, have you seen or heard any publicity, advertising or information about the Wales Coast Path? **Base:** All businesses who have seen or heard publicity, advertising or information (255) **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

Slide 22

EW0

Note for NRW - we have checked and magazines and newspapers were kept separate in the 2013 report, so this comment still stands

Emily Ward, 2025-02-06T13:39:56.231

Perceptions of advertising

All businesses who have seen or heard any publicity, advertising or information about the Wales Coast Path were asked to provide feedback on the frequency and effectiveness (in terms of attracting visitors/users and helping/impacting the future success of businesses). 81% of businesses rate the 'effectiveness' of recent publicity to attract users as at least 'fair'. Additionally, 64% rate its potential benefit on the future success of their business as 'good'/'fair'. Similarly, 76% of businesses feel the frequency of advertising is effective. These results are in line with the overall trends from the total sample.

"How would you rate the publicity, advertising or information you have seen or heard about the path in the past year, in terms of...?"

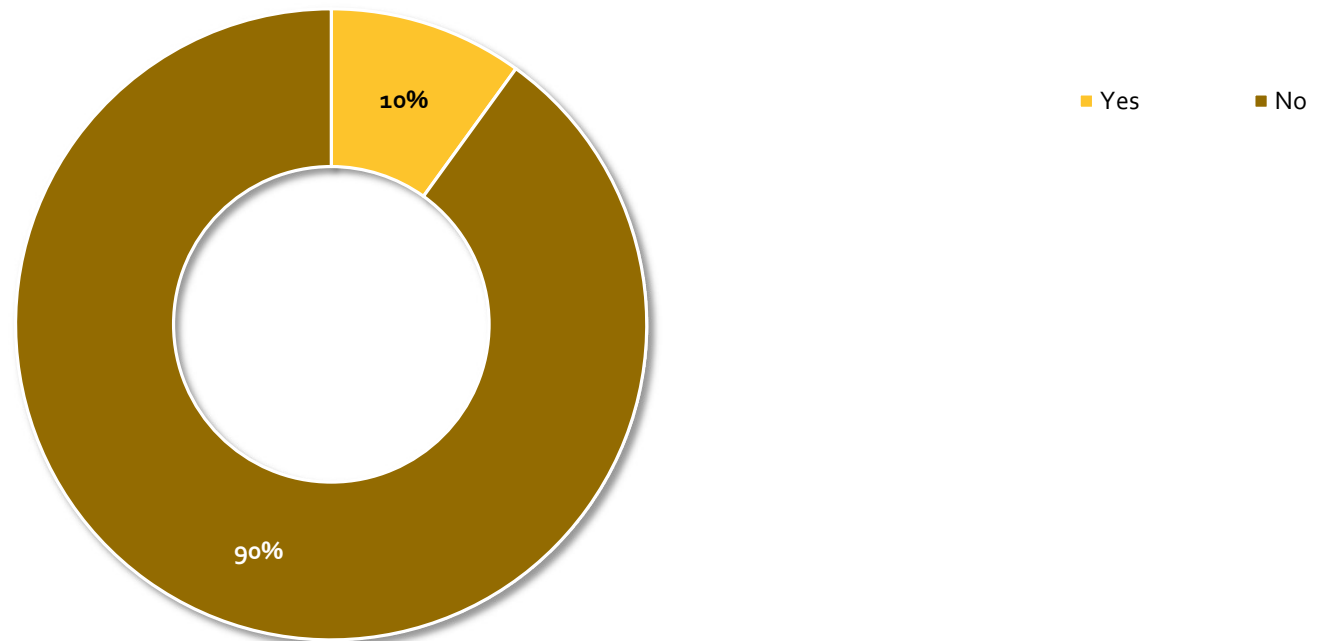
	Good	Fair	Poor	Don't know
Frequency	35% (37% for all surveyed routes)	41% (36% for all surveyed routes)	18% (20% for all surveyed routes)	5% (7% for all surveyed routes)
Effectiveness in terms of attracting visitors/users to the path	50% (50% for all surveyed routes)	31% (28% for all surveyed routes)	11% (11% for all surveyed routes)	8% (11% for all surveyed routes)
Effectiveness in terms of helping or benefitting the success of your business	30% (29% for all surveyed routes)	34% (33% for all surveyed routes)	18% (19% for all surveyed routes)	18% (19% for all surveyed routes)

Base: All businesses who have seen or heard publicity, advertising or information (255) **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...?

Receipt of direct communications

Just 10% of businesses recall having received direct communications about the Wales Coast Path in the past year. Of the 66 businesses who recall seeing direct communications in the last year, the most common channels for receiving this information is via email (48%), followed by Facebook (21%). 17% have received a newsletter about the Wales Coast Path within the last year.

% received direct communications



Base: All businesses assigned to the Wales Coast Path (664) **Q15.** Over the past year, do you recall receiving any direct communications about the Wales Coast Path?

Receipt of direct communications

Rating of direct communications received in the past year, in terms of... *

	Good	Fair	Poor	Don't know
Frequency	41% (42% for all surveyed routes)	33% (36% for all surveyed routes)	17% (14% for all surveyed routes)	9% (8% for all surveyed routes)
Effectiveness in terms of attracting visitors/users to the path	45% (49% for all surveyed routes)	30% (27% for all surveyed routes)	11% (10% for all surveyed routes)	14% (13% for all surveyed routes)
Effectiveness in terms of helping or benefitting the success of your business	35% (40% for all surveyed routes)	33% (34% for all surveyed routes)	23% (18% for all surveyed routes)	9% (9% for all surveyed routes)

75% of businesses that recall receiving them, feel that recent direct communications were 'fair' or 'good' in terms of attracting visitors to the path. They are also positive about the frequency of direct communications, with a similar proportion rating this aspect as at least fair (74%).

Businesses are slightly less positive with regards to the effectiveness of direct communications in terms of helping or benefitting the success of their business (68% v 74% total).

There are no significant differences compared to the average for all surveyed routes.

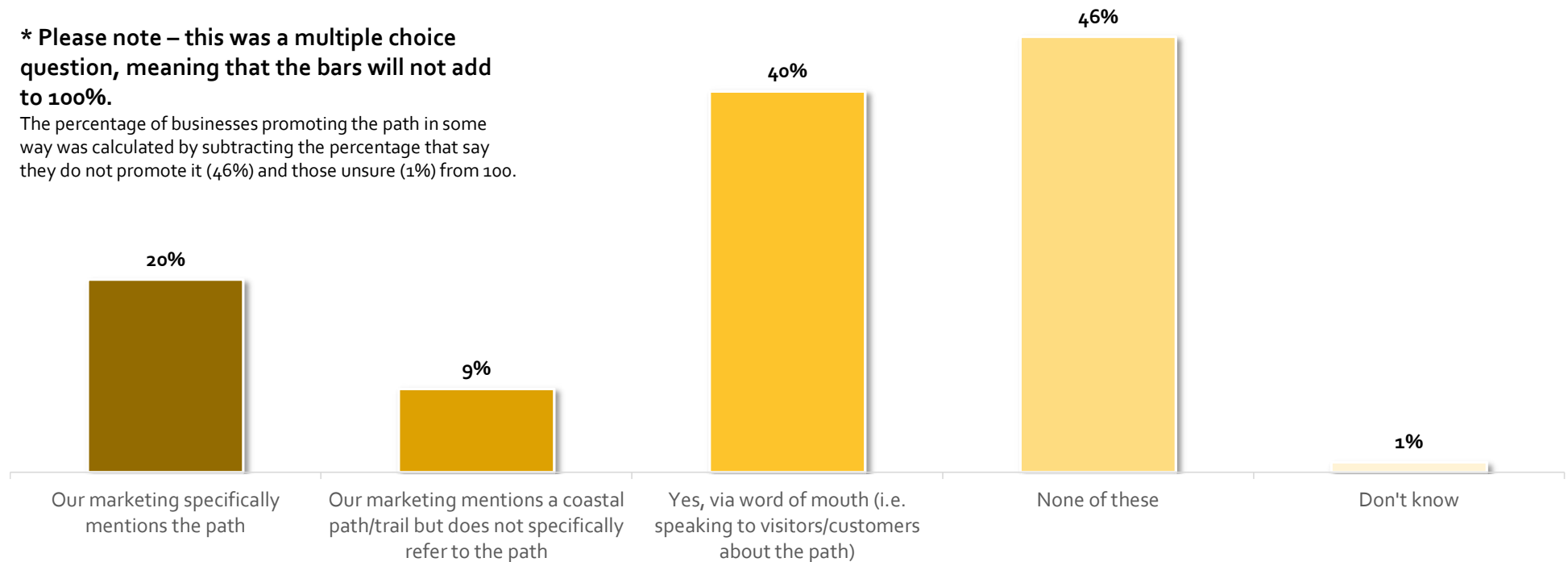
Base: All businesses assigned to the Wales Coast Path who recall receiving direct communications (66) **Q16** How would you rate the direct communications you have received in the past year about the Wales Coast Path, in terms of... ? *CAUTION – low base size

Path promotion by businesses

52% of businesses promote the Wales Coast Path in some way, with 20% stating that the path is specifically mentioned in their marketing materials. This figure is higher than that seen in 2013 (15%). A further 40% of businesses promote the path via word-of-mouth, and 9% mention a path, but not by name (compared to 19% doing the same in 2013).

*** 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 (1%) from 100.

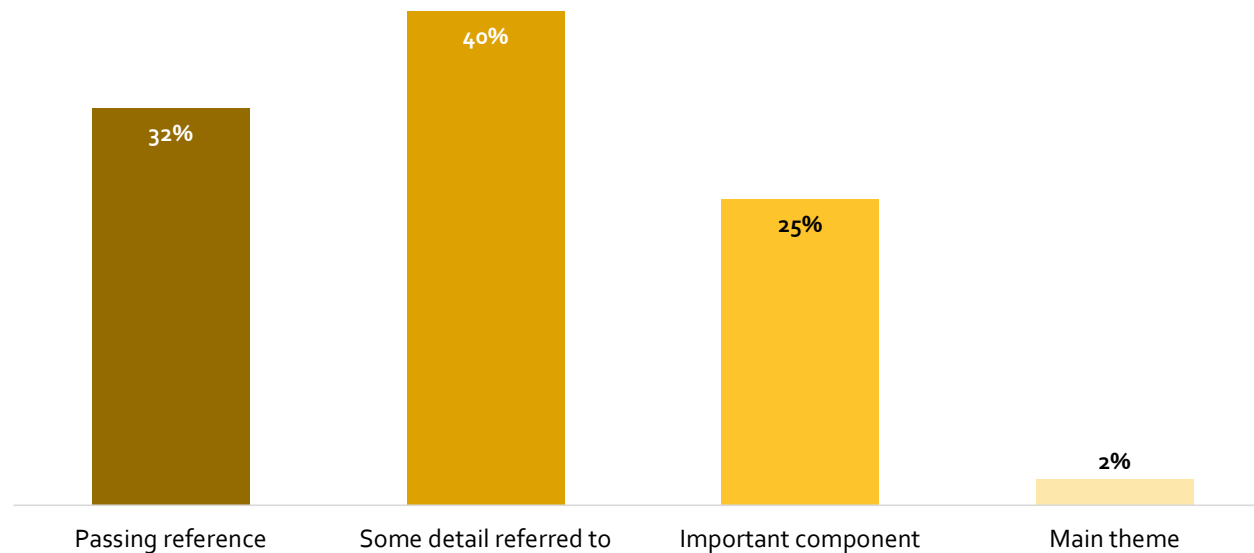


Base: All businesses assigned to the Wales Coast Path (663) **Q17.** Do you mention or promote the Wales Coast Path in any of your own marketing materials, for example on your website or social media channels, or when speaking to your customers?

Path promotion by businesses

All businesses who mention the Wales Coast Path in their marketing materials were asked how prominent it is. 2% say it's the main theme and 25% consider it to be an important component. A further 40% state that some detail is referred to. The remaining 32% consider it to just be a passing reference.

Prominence of path in marketing materials



In the last 10 years, it seems that the path has become less of a prominent fixture in marketing materials.

In 2013, the Wales Coast Path formed an important component of the marketing of 45% of businesses, 20% points higher than today.

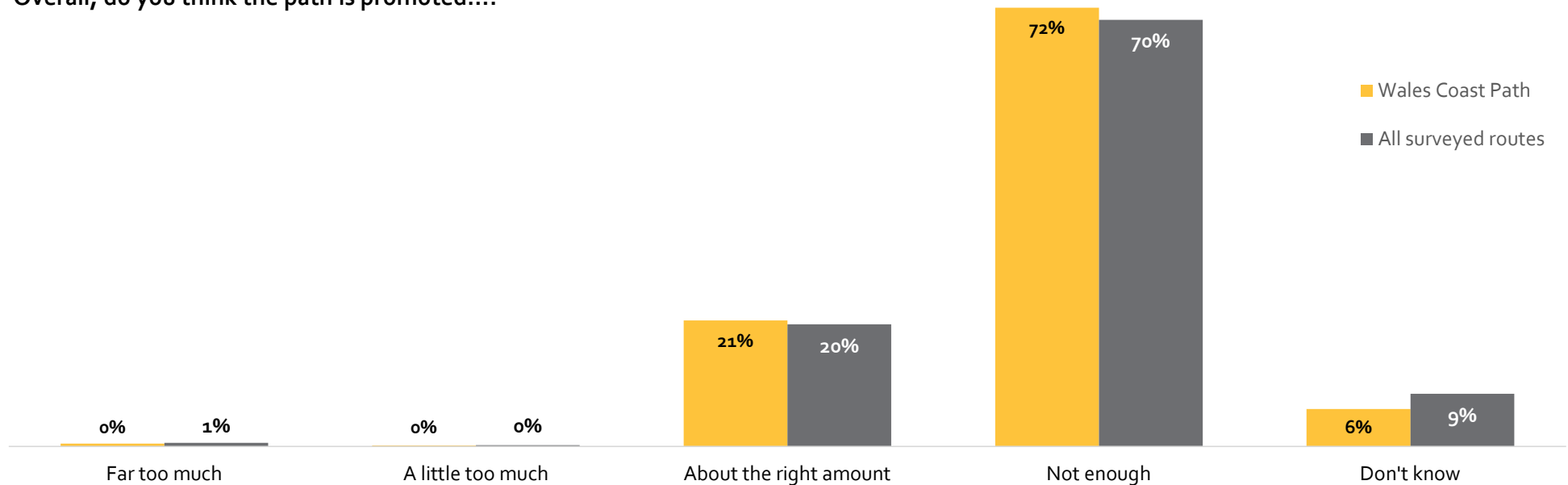
Likewise, in 2013, the path was the main theme of the material of 6% of businesses. Now, that figure is just 2%.

Base: All businesses who mention the Wales Coast Path in their marketing materials (188) **Q18.** Which of the following best describes how prominent the Wales Coast Path is in your marketing?

Path promotion

Whilst 21% of businesses think the Wales Coast Path is already promoted enough, a much higher proportion (72%) do not think it is promoted sufficiently.

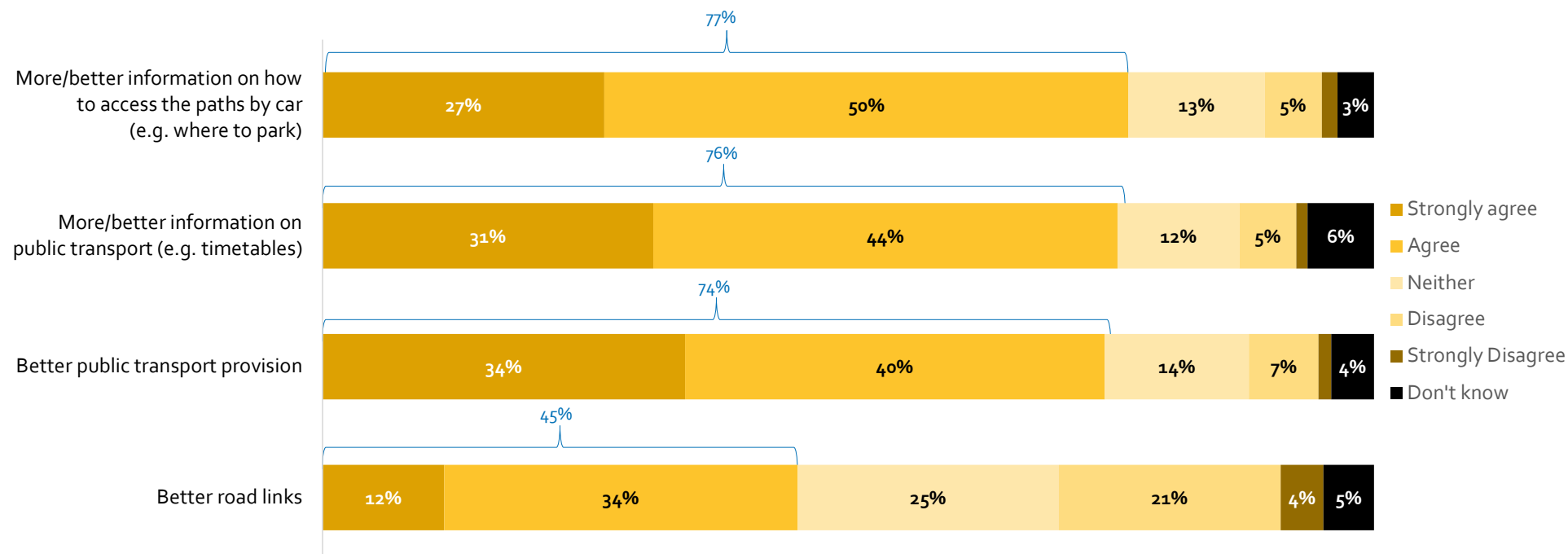
Overall, do you think the path is promoted...?



Base: All businesses assigned to the Wales Coast Path (664) **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 they are needed. 77% of businesses feel that more/better information on how to access the path by car is needed. This is closely followed by more/better information on public transport such as timetables (76%) and better public transport provision (74%). On a more positive note, only 45% businesses think better road links are needed.

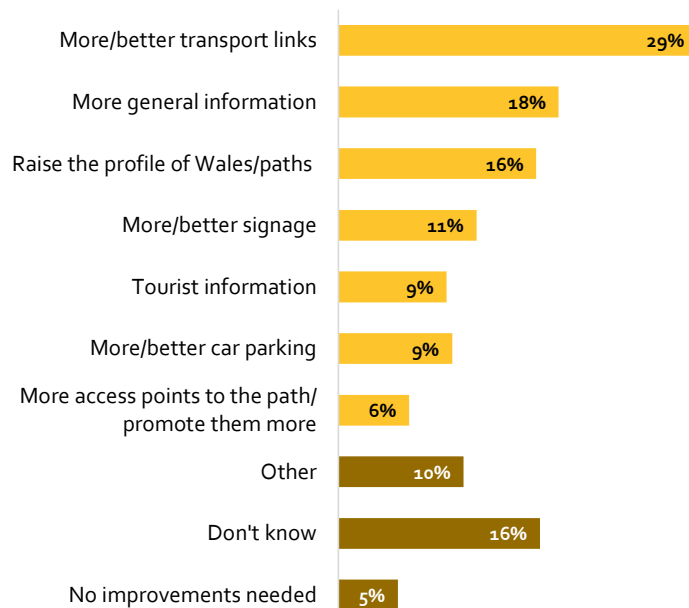


Base: All businesses assigned to the Wales Coast Path (664) **Q21.** To what extent, do you agree or disagree that each following are needed to encourage more people to visit the Wales Coast Path?

*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 is to improve transport links, with 29% making this a priority. 18% believe that customers/visitors could benefit from more general information about the area and the path, and 16% believe that in order to help customers access and travel around the path, the profile of Wales and the routes it has needs to be raised.



"They need to make more signage to get on the path easily both on foot and by car."

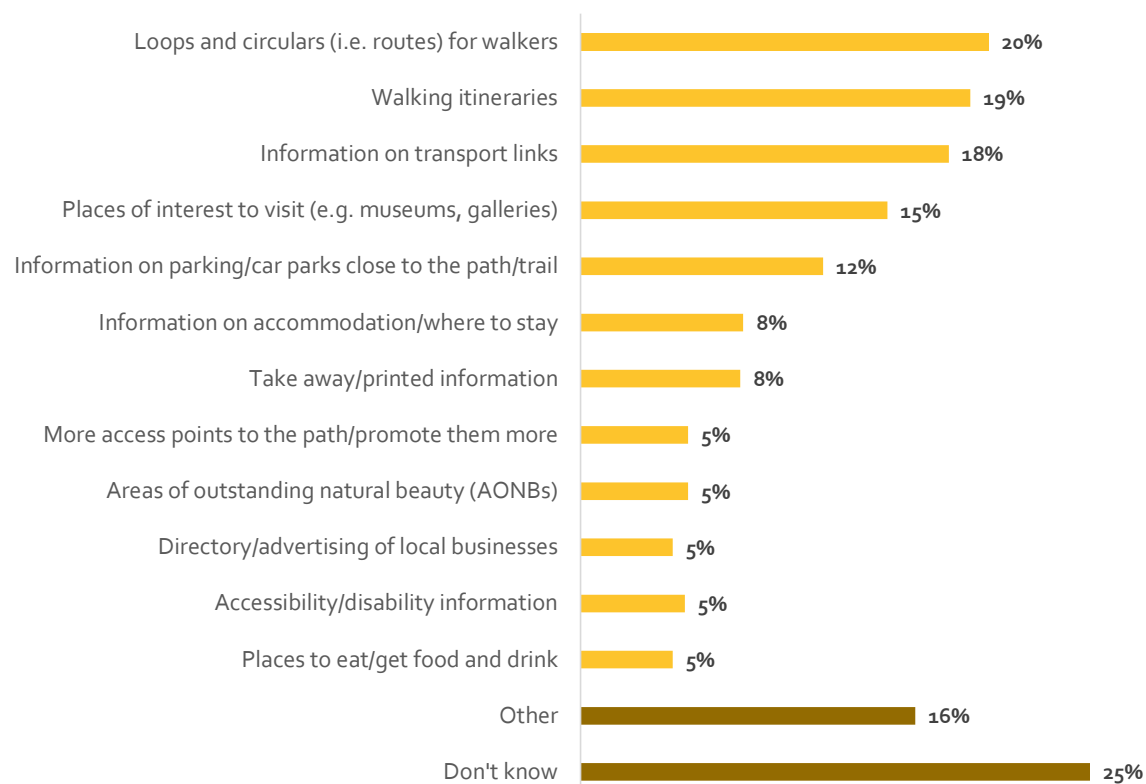
"Need better information on available bus services and more bus services. Generally, we have to catch taxis because there are no available buses when we finish our walks."

"Keep the local visitor centres open because they provide quite a lot of information and also serve as a major attractor to visitors of the local area."

Base: All businesses assigned to the Wales Coast Path (664) **Q22.** What improvements (if any), do you think are needed to help more customers/visitors travel around or access the path? *note – mentions <5% not shown.

Information to support business customers/path users

The most frequently mentioned information that businesses believe that their customers would find the most beneficial relate to loops and circulars (routes) (20%) and itineraries (19%) for walkers.



'Other' responses

"Details of special animal species to look at on the way."

"Emergency services, information on mobile phone signal receptions around the area."

Base: All businesses assigned to the Wales Coast Path (663) Q30. What kind of information do you think would be most helpful to your customers or other users of the Wales Coast Path? *Note – mentions <5% not shown

The Wales Coast Path

Conclusions and recommendations

Conclusions

54% of businesses state that the Wales Coast Path has a positive impact on their businesses

In particular, 48% of businesses agree that the presence of the path has increased the number of visitors to their business. 36% believe that it has boosted their sales/turnover.

Half of businesses are happy with the maintenance of the path furniture

However, businesses along the Wales Coast Path show some concern over the maintenance of the facilities along it (27% poor/very poor) and its accessibility for those with limited mobility or buggies (37% poor/very poor).

Though 52% of businesses promote the Wales Coast Path in some way, just 20% of businesses specifically mention the path in their marketing materials

Instead, businesses are much more likely to mention the path via word of mouth (40%).

Recommendations

It might be helpful to explore initiatives that further leverage the path's influence on local businesses.

Collaborating with businesses to create visitor-centric offers or events could enhance the path's benefit on both visitor numbers and sales.

While maintenance of the path furniture is well-regarded, addressing concerns about the upkeep of facilities and improving accessibility for those with limited mobility or buggies could significantly enhance the overall experience for visitors.

To help businesses better promote the Wales Coast Path, providing them with resources and incentives to feature the path in their marketing materials could be effective.

This might encourage more businesses to actively promote the path beyond just word of mouth.

Conclusions

72% of businesses along the Wales Coast Path do not think that the path is promoted enough.

When asked in an open question what might improve access to the path, the top response was to improve the transport links (29%). 16% would also like to see the organisation work harder to raise the profile of Wales and its coastal walks.

When asked what information could be provided to support business customers/path users, the top recommendation was to provide routes and walking itineraries for walkers.

15% would also like places of interest to be further highlighted.

Recommendations

Considering that many businesses feel the path is under-promoted, it could be beneficial to invest in a campaign that enhances both the availability of information on transport links and the overall visibility of Wales and its coastal walks.

Strengthening these aspects could attract more visitors and better support the local economy.

To better assist businesses' customers and path users, consider creating materials that feature routes and walking itineraries along with highlighted places of interest.

Distributing these to local businesses could enrich the visitor experience by guiding walkers not only on their routes but also to noteworthy sites along the way, adding value to their journey and encouraging exploration of the area.

For more information

Julie Hollingsworth, Associate Director
jhollingsworth@djsresearch.com

Clare Rapkins, Senior Research Manager
crapkins@djsresearch.com

Emily Ward, Senior Research Executive
eward@djsresearch.com



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

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

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

