



**Cyfoeth  
Naturiol  
Cymru**  
**Natural  
Resources  
Wales**

# EVALUATING THE BENEFITS TO BUSINESS OF THE WALES COAST PATH



**Llwybr Arfordir Cymru**  
**Wales Coast Path**



**Llywodraeth Cymru**  
**Welsh Government**



**Wales  
Cymru**



## About Natural Resources Wales

Natural Resources Wales brings together the work of the Countryside Council for Wales, Environment Agency Wales and Forestry Commission Wales, as well as some functions of Welsh Government. Our purpose is to ensure that the natural resources of Wales are sustainably maintained, enhanced and used, now and in the future.

Wales' landscape, environment and wildlife are amongst its greatest resource, worth more than £8bn to the Welsh economy.

- We will work for Wales' economy and enable the sustainable use of natural resources to support jobs and enterprise. We will help businesses and developers to understand and consider environmental impacts when they make important decisions
- We will work for the communities of Wales to protect people and their homes as much as possible from environmental incidents like flooding and pollution. We will provide opportunities for them to learn, use and benefit from Wales' natural resources
- We will work to maintain and improve the quality of the environment for everyone. We will work towards making the environment and natural resources more resilient to climate change and other pressures.

We are the principal adviser to the Welsh Government on the environment, enabling the sustainable development of Wales' natural resources for the benefit of people, the economy and wildlife.

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## **Gwerthuso manteision Llwybr Arfordir Cymru i fusnesau (340 EOG 12)**

### **Crynodeb Gweithredol**

Cafodd Llwybr Arfordir Cymru ei datblygu gan Lywodraeth Cymru mewn partneriaeth â Chyfoeth Naturiol Cymru (Cyngor Cefn Gwlad Cymru, gynt) un deg chwech o awdurdodau lleol a dau Barc Cenedlaethol. Yn ogystal â thua £2 miliwn o arian y flwyddyn gan Lywodraeth Cymru a'r awdurdodau lleol arfordirol, mae thema Amgylchedd am Dwf Rhaglen Cydgyfeirio Cronfa Datblygu Rhanbarthol Ewrop wedi dyrannu bron iawn £4 miliwn dros bedair blynedd ar gyfer y rhannau hynny o Lwybr Arfordir Cymru sydd yn rhedeg drwy ardaloedd y 10 awdurdod lleol arfordirol yn yr ardal Cydgyfeirio.

Cafodd yr astudiaeth hon ei chomisiynu gan Gyngor Cefn Gwlad Cymru / Cyfoeth Naturiol Cymru, ar ôl agor Llwybr Arfordir Cymru, sydd yn 870 milltir o hyd, yn swyddogol ar 5 Mai 2012, i adrodd ar effeithiau economaidd yr ymyrraeth. Yn benodol, roedd angen asesu a lwyddodd Llwybr Arfordir Cymru i gyrraedd y dangosyddion a gafodd eu pennu gan Swyddfa Cyllid Ewropeaidd Cymru ynghylch y cyllid a ddaeth o raglen Cronfa Datblygu Rhanbarthol Ewrop.

Gofynnodd y cleient am asesu yn erbyn y dangosyddion gwreiddiol a gafodd eu diffinio gan Swyddfa Cyllid Ewropeaidd Cymru fel a ganlyn:

- Creu 4 swydd ychwanegol ac 1 fenter ychwanegol.

Roedd yr astudiaeth yn canolbwyntio'n bennaf ar a lwyddwyd i gyrraedd dangosyddion Swyddfa Cyllid Ewropeaidd Cymru yn yr ardal Cydgyfeirio, ond mae hefyd yn cynnwys gwybodaeth ar lefel Cymru gyfan. Cafodd cyfweiliadau ffôn eu cynnal gyda 1,600 allan o'r 5,407 o fusnesau sy'n gysylltiedig â thwristiaeth a nodwyd mewn coridor 2km ar hyd y Llwybr.

### **Casgliadau**

Mae Llwybr Arfordir Cymru wedi ychwanegu cynnyrch newydd arwyddocaol at asedau twristiaeth Cymru ac, o ganlyniad i'w lansio a'i hyrwyddo, codwyd proffil Cymru a'i harfordir yn ogystal â'r Llwybr ei hunan. Mae cyfle i fwy na 5,400 o fusnesau sy'n gysylltiedig â thwristiaeth fanteisio ar y rhai sydd eisoes yn defnyddio'r Llwybr, yn ogystal ag ar y nifer cynyddol y disgwylir a fydd yn gwneud hynny yn y dyfodol. Mae 4,000 o'r busnesau hyn yn yr ardal Cydgyfeirio.

- Dangosodd arolwg o'r busnesau yn yr ardal Cydgyfeirio fod 41 o staff ychwanegol wedi'u cyflogi o ganlyniad i Lwybr Arfordir Cymru, cyfwerth â 28.2 o swyddi llawn amser. Mae hynny y tu hwnt i ddangosydd Swyddfa Cyllid Ewropeaidd Cymru o greu pedair swydd ychwanegol. Amcangyfrifir efallai bod cyfanswm o 112.1 o swyddi cyfwerth llawn amser wedi'u creu ar hyd y cyfan o Lwybr Arfordir Cymru.
- Mae 4.0 o fentrau ychwanegol wedi'u nodi y gellir eu priodoli i Lwybr Arfordir Cymru yn yr ardal Cydgyfeirio, sydd y tu hwnt i ddangosydd Swyddfa Cyllid Ewropeaidd Cymru o greu 1 fenter ychwanegol.

- Ar ddiwedd blwyddyn gyntaf ei agor, roedd 79% o fusnesau cysylltiedig â thwristiaeth wedi clywed am Lwybr Arfordir Cymru. Roedd 18% o fusnesau cysylltiedig â thwristiaeth yn gallu dweud fod Llwybr Arfordir Cymru wedi effeithio ar nifer cwsmeriaid eu busnesau. Roedd 1 mewn 7 o'r busnesau a oedd yn dweud bod yna newid hefyd yn dweud fod nifer y cwsmeriaid 'wedi cynyddu llawer'.
- Mae 16% o fusnesau a oedd wedi clywed am Lwybr Arfordir Cymru wedi cyflwyno gwasanaeth neu gynnyrch newydd i annog neu gefnogi eu cwsmeriaid i'w ddefnyddio. Mae ychydig o fusnesau hefyd wedi ymateb trwy gynyddu'r amser maen nhw ar agor, cynyddu nifer a / neu'r oriau y bydd staff yn gweithio, ac, mewn rhai achosion, wedi buddsoddi cyfalaf yn y busnes.
- Wrth edrych i'r dyfodol, mae 32% o'r busnesau oedd yn cymryd rhan yn yr arolwg o'r farn y daw Llwybr Arfordir Cymru'n bwysicach i lwyddiant eu busnesau yn y dyfodol. Seilir yr optimistiaeth ar eu profiad hyd yma, uchelgais am y dyfodol, tueddiadau'r farchnad a nodweddion y farchnad gerdded. Mae rhai eisoes yn ystyried eu cynlluniau, o bethau syml i fuddsoddiad arwyddocaol.

### ***Gwneud y gorau o fanteision i fusnesau yn y dyfodol***

Wrth symud ymlaen, mae busnesau unigol yn dymuno cael manteision parhaus a chynyddol o Lwybr Arfordir Cymru. I rai, roedd eu hoptimistiaeth am y dyfodol yn cael ei seilio ar y ceir rhai datblygiadau ac roedd busnesau'n awgrymu nifer o bethau y gellid eu gwneud i'w gwneud yn fwy tebygol y ceid y datblygiadau hynny. Roedd y rhain yn cynnwys:

- Perffeithio lleoli Llwybr Arfordir Cymru fel cynnyrch, yn seiliedig ar ddealltwriaeth o'r farchnad, ehangu diddordeb, ei apêl drwy'r flwyddyn a'i asedau naturiol.
- Gweithrediadau ymarferol i sicrhau ei bod yn hawdd defnyddio Llwybr Arfordir Cymru, a bod hynny'n parhau, gan gynnwys gwella ansawdd ac aliniad y llwybr, buddsoddi mewn seilwaith, cynnal a chadw o safon dda, cynnal adnoddau a gwasanaethau ar y llwybr a darparu mwy a gwell gwybodaeth i fusnesau ac i ddefnyddwyr y dyfodol, a hynny'n barhaus.
- Gweithio i greu cysylltiad gwell rhwng busnesau a Llwybr Arfordir Cymru, gan gynnwys cysylltu mwy â busnesau, cryfhau cysylltiadau ffisegol rhwng busnesau a threfi a phentrefi, cyfuno gwybodaeth a gwella cyfleoedd i gael cyllid i fuddsoddi i gyfarfod ag anghenion defnyddwyr y Llwybr.
- Cael rhagor o gydweithio rhwng yr holl wahanol rhanddeiliaid i gael y gorau o'r buddsoddiad yn Llwybr Arfordir Cymru, gan gynnwys dal ati i'w hyrwyddo yn gynyddol.

### ***Casgliad***

Mae Llwybr Arfordir Cymru dal yn ei fabandod ac mae'n rhy gynnar i fusnesau allu ymateb yn llawn i'r cyfleoedd newydd sy'n codi o'i agor. Mae'n galonogol yr aed y tu hwnt i'r dangosyddion yr oedd Swyddfa Cyllid Ewropeaidd Cymru wedi'u diffinio.

Ers agor y Llwybr yn swyddogol fis Mai 2012, mae ansawdd ac aliniad y llwybr yn dal i gael ei wella er mwyn sicrhau fod y llwybr yn dilyn arfordir Cymru mor agos ag y mae hynny'n ddiogel ac yn ymarferol. Wrth edrych ymlaen, gellir disgwyl y bydd ymwybyddiaeth yn cynyddu ymysg busnesau yn ogystal ag ymysg rhai a fydd yn ei ddefnyddio.

Nid yw'r astudiaeth hon yn ceisio trafod y cyfan o'r manteision sydd wedi codi i fusnesau o agor Llwybr Arfordir Cymru. Gellir disgwyl y bydd busnesau'n gysylltiedig â thwristiaeth y tu hwnt i'r coridor 2 km ar hyd Llwybr Arfordir Cymru hefyd ar eu hennill yn gynyddol. Mae gan yr astudiaeth hon ran i'w chwarae fel asesiad llinell waelodol ar gyfer seilio unrhyw werthusiad yn y dyfodol.

## **Evaluating the benefits to business of the Wales Coast Path (340 EOG 12)**

### **Executive Summary**

The Wales Coast Path has been developed by the Welsh Government in partnership with Natural Resources Wales (NRW) (formerly the Countryside Council for Wales), sixteen local authorities and two National Parks. In addition to funding of approximately £2 million per year from the Welsh Government and the coastal local authorities, the Environment for Growth (E4G) theme of the European Regional Development Fund (ERDF) Convergence Programme has allocated nearly £4 million over four years in support of those parts of the Wales Coast Path in 10 coastal local authorities in the Convergence area.

This study was commissioned by CCW/NRW following the official opening of the 870 miles long Wales Coast Path on 5<sup>th</sup> May 2012, calling for a report on the economic impact of the intervention. In particular, an assessment was required of whether the Wales Coast Path has successfully achieved indicators specified by the Welsh European Funding Office (WEFO) in relation to funding from the ERDF programme.

The client asked for an assessment against the original WEFO defined indicators:

- 4 gross additional jobs created; and 1 additional enterprise created.

The primary focus of the study was on achievement of the WEFO indicators within the Convergence area, but also includes information at an all Wales level. Telephone interviews were completed with 1600 of the 5407 tourism-related businesses identified in a 2km corridor along the route of the WCP.

### ***Findings***

The Wales Coast Path has added a significant new product to the tourism assets of Wales, and its launch and promotion have raised the profile of Wales and its coastline as well as the Path itself. More than 5400 tourism-related businesses are well placed to derive benefit from those already using the Path and the increasing numbers expected to do so in the future. 4000 of these businesses are located within the Convergence area.

- Businesses surveyed within the Convergence area reported that 41 extra staff were employed as a result of the Wales Coast Path, equivalent to 28.2 FTEs. This exceeds the WEFO indicator of 4 additional jobs created. It is estimated that a total of 112.1 additional FTEs may have been created along the entire Wales Coast Path.
- 4.0 additional enterprises have been identified which can be attributed to the Wales Coast Path within the Convergence area, exceeding the WEFO indicator of 1 additional enterprise created.
- At the end of its first year of opening, 79% tourism-related businesses have heard of the Wales Coast Path. 18% tourism-related businesses are able to report that the Wales Coast Path has had an effect on the number of customers to their business. 1 in 7 of businesses reporting any change stated that customers had 'increased a lot'.
- 16% of businesses having heard of the Wales Coast Path have introduced a new service or product to encourage or support its use amongst their customers. A limited number of

businesses have also responded by increasing the period for which they are open, increasing staffing levels and/or hours worked and, in some cases, making a capital investment in the business.

- Looking to the future, 32% of businesses taking part in the survey considered that the Wales Coast Path would become more important in future to the success of their business. Optimism was based on experience to date, ambition for the future, observed market trends and characteristics of the walking market. Some already have plans in mind, from simple actions to significant investment.

### ***Maximising future benefits to business***

Going forward, individual businesses wish to see continued and growing benefits arising from the Wales Coast Path. For some, optimism about the future was contingent on certain things happening and businesses suggested a number of actions that would increase the likelihood of such an outcome. These include:

- Perfecting the positioning of the Wales Coast Path as a product, based on market understanding, broadening interest, year round appeal and its natural assets.
- Practical actions to secure and sustain ease of use of the Wales Coast Path, including continuing improvements to the quality and alignment of the route, infrastructure investment, high levels of maintenance, maintaining facilities and services along the route and providing more and better information to businesses and to future users.
- Activity to build connectivity between businesses and the Wales Coast Path, including greater business engagement, strengthening physical links with businesses and settlements, integrating information and improving access to finance to support investment to meet the needs of Path users.
- Achieving greater co-ordination between all of the different stakeholders to achieve the best outcomes from the investment that has been made in the Wales Coast Path, including sustaining and improving its promotion.

### ***Conclusion***

The Wales Coast Path is still in its infancy, and it is early days to expect to see the full effect of any response from business to new opportunities arising from the opening of the Path. It is encouraging that the WEFO defined indicators have been exceeded.

Since the official opening of the Path in May 2012, improvements have continued to the quality and alignment of the route to ensure that the path follows the Welsh coastline as closely as is safe and practical. Going forward, it can be expected that awareness will increase amongst businesses as well as amongst potential users.

This study does not account for the full range of benefits to business arising from the opening of the Wales Coast Path. Additional benefits can be expected to have arisen, and will continue to arise, to tourism-related businesses beyond a 2km corridor along the Wales Coast Path. This study has a part to play as an early baseline assessment on which to base any future evaluation.

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This study was led by The Tourism Company, working together with Beaufort Research Ltd, exGesis SDM Ltd and Houston Economic Consulting Ltd.

We would like to thank all of the businesses along the Wales Coast Path who gave their time to take part in the research.

# 1 Introduction

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## 1.1 Background

The Wales Coast Path has been developed by the Welsh Government in partnership with Natural Resources Wales (NRW) (formerly the Countryside Council for Wales), sixteen local authorities and two National Parks. In addition to funding of approximately £2 million per year from the Welsh Government and the coastal local authorities, the Environment for Growth (E4G) theme of the European Regional Development Fund (ERDF) Convergence Programme has allocated nearly £4 million over four years in support of the project.

The idea was developed out of a desire to build on the economic success of the Pembrokeshire Coast Path National Trail and the Isle of Anglesey Coastal Path – both of which have been shown to be major contributors to the visitor economy of Wales.

The 870 mile long Wales Coast Path was officially opened on 5<sup>th</sup> May 2012. Improvements to the quality and alignment of the route have continued during 2012 and 2013 to ensure that the path follows the Welsh coastline as closely as is safe and practical.

## 1.2 Research brief

A brief was issued by CCW/NRW in the summer of 2012 for a report on the economic impact of the intervention. In particular, an assessment was required of whether the Wales Coast Path has successfully achieved the indicators defined by the Welsh European Funding Office (WEFO) in relation to funding from the ERDF programme. This funding was available to those parts of the Wales Coast Path in the 10 coastal local authorities in the Convergence area. The WEFO defined indicators were:

- 8 gross additional jobs created; and
- 2 additional enterprises created.

The client asked for an assessment against these original indicators, which were specified in the brief. However, the indicators were subsequently reduced by WEFO to:

- 4 gross additional jobs created; and
- 1 additional enterprises created.

Although the focus of interest is on achieving WEFO indicators within the Convergence area, the study has been designed as an All Wales study which provides information about the Convergence area and All Wales alike.

In order to make the assessment, the brief asked for survey data to be gathered from businesses located within a 2km corridor along the route of the WCP, in order to learn more about the perceived additional business opportunities that the Path presents.

The initial brief was for face-to-face interviews to be carried out in two waves, in 2012 and 2013. Subsequently, a revised tender was agreed for a target of 1500 telephone interviews to be carried out in a single wave in 2013.

## 2 Methodology

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This Chapter sets out the methodology for the study, first considering the chosen survey method and overall approach. Details are given of how the research universe was compiled. Conduct of the telephone interviews is described, and the characteristics of the achieved sample are compared with the overall research universe.

### 2.1 Chosen survey method

The brief asked for a sample of businesses to be recruited, based on a sampling framework developed to take account of the following criteria:

- Convergence/non-Convergence area
- Rural/urban
- Existing/Improved/New path
- Business type.

The chosen survey method of contacting businesses by telephone is efficient when compared to a face to face approach. There is no travel time between businesses and whilst a telephone approach will also require appointments and repeat calls this can be done in a fraction of the time it would take to arrange and complete face to face. The end result is a far superior strike rate. A telephone approach is also likely to produce a geographically less clustered sample. It is simpler to arrange for a telephone interview to be conducted in the Welsh language.

An interviewer-administered telephone approach also allows the sample to be controlled by the use of quotas so that the profile of achieved interviews matches as closely as possible the profile of the research universe.

### 2.2 Shaping the approach

A number of issues were considered in shaping the approach to the survey, and in particular designing the content and sequence of the telephone interview.

#### *Recognising the limits of business understanding of their customers*

Considerable variation can be expected between businesses in awareness of who their customers are and why they are there. In some situations, notably in the larger villages and small towns on the routes, it may be difficult for many shops, service facilities and catering outlets to say exactly how much of their passing business is coming from WCP users.

#### *Recognising variation in awareness of the Wales Coast Path*

There may also be variation in awareness of the Wales Coast Path itself. In some places, there may be confusion with the predecessor and more established route, such as the Pembrokeshire Coast Path. In others, particularly some of the larger resorts, the Wales Coast Path may be incidental to activity on the coastal strip or confused with the coast in general.

#### *Measuring perception rather than attributing actual impact*

Allied to the previous issue is the question of how realistic it is to ask businesses to attribute any change in performance to the advent of the Wales Coast Path. What

any survey will in fact be measuring is the owner or manager's perception of the impact of the Path.

#### *Recognising the limitations of the interview schedule*

As the WCP was already open, a 'before' picture could not be obtained from the interviews, so there was a need to include some retrospective questioning. A completion date of August 2013 required interviewing to be carried out by July 2013. This gave little more than a year for the Wales Coast Path to make itself felt.

#### *Gaining benefit beyond answering the simple research question*

While the primary purpose of the survey was to assess if the WCP has successfully achieved its WEFO defined indicators, opportunities have been taken to gain benefits beyond a simple measure of economic impact. Guidance was taken from reference in the brief to 'assessing business perceptions of business opportunities and investment plans'.

These issues were carefully considered in designing our telephone interview. The text of the telephone interview was approved by NRW/CCW in January 2013. A copy of the interview is included as Appendix One<sup>1</sup>. In order to reflect the approach taken, agreement was given to a change in title of the contract to 'Evaluating the benefits to business of the Wales Coast Path'.

### **2.3 Building the database of businesses**

A postcode definition of a corridor surrounding the route of the Wales Coast Path was prepared, based on 239 postcode sectors. This provided an initial means to roughly filter relevant businesses based on postcode details.

Visit Wales (VW) provided their database of 3173 quality assessed accommodation establishments and 250 visitor attractions. By application of the postcode definition, the VW database was reduced to 1888 accommodation establishments and 131 visitor attractions identified to be in the vicinity of the Wales Coast Path.

It was essential to spread the search to a wider range of businesses. A SIC code definition was developed of types of businesses, including accommodation, which may be thought to provide services to Wales Coast Path users. An order was placed with a commercial company<sup>2</sup> for contact details (establishment name, address including postcode and telephone number) of tourism businesses meeting both the postcode definition and the SIC code definition, resulting in the purchase of 5026 records.

The Experian database was combined with the Visit Wales database and duplicates removed, resulting in a database of 6550 records.

An approach was made to all local authority partners, requesting specific help with providing contact details for tourism businesses in their area. While all local authorities expressed their willingness to help, only one (Monmouthshire County Council) proved able to release contact details, which were provided to our postcode specification. Several other local authorities provided lists of names of establishments (but without any contact details) believed to be located on or near the

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<sup>1</sup> The text includes a small number of amendments which were made following the pilot interviews, and one routing amendment made shortly after interviewing was under way.

<sup>2</sup> Source powered by the National Business Database

Wales Coast Path. Full contact details were located online and added to the database.

A number of searches were made of web-based information on destinations along the Wales Coast Path and of specialist lists such as activity operators. Again, a postcode search was applied and contact details identified. These new businesses were added to the database.

## 2.4 Identifying relevant tourism-related businesses

The compiled database included details of 7104 businesses fitting the postcode definition of the route of the Wales Coast Path and believed to offer one or more tourism service to its users. This was passed to exeGesIS for 'trimming' to a 2km buffer on either side of the GIS definition of the route of the WCP as at launch in May 2012. This brought the size of the active database down to 5407. This became the 'known' or 'research universe' of tourism-related businesses in the 2km zone of the Wales Coast Path.

Each tourism-related business was tagged by whether or not it was located in the Convergence area, tourism sector as known at the time, and whether or not the location was rural or urban<sup>3</sup>. (It was not possible for NRW to supply the spatial data required to classify sections of the path as New, Existing or Improved.)

The characteristics of the full universe were as follows:

**Table 2.1 Characteristics of final database**

<b>Total number of businesses</b>	5407	
<b>Convergence / non-Convergence</b>		
Convergence	4038	75%
non-Convergence	1369	25%
<b>Sector</b>		
Accommodation	1923	36%
Service / hospitality	2155	40%
Retail	1128	21%
Attraction / activity / other	201	4%
<b>Distance to WCP</b>		
Up to 1km	4285	79%
1km+	1122	21%
<b>Urban-Rural</b>		
Urban	4082	75%
Rural	1325	25%

<sup>3</sup> In the absence of an accepted definition of rural/urban in Wales, exeGesIS applied a dataset provided by CCW. In this dataset, 'urban' is applied to developed settlements some of which can be quite small in size.

## **2.5 Conducting the interviews**

Records for the 5407 businesses in the target database were handed to Beaufort Research Ltd., giving sufficient sample to at least aim for the original target of 1,500 successful interviews. However, the conversion rate was considered to be borderline and it was agreed to monitor this closely during the fieldwork period.

Following agreement to final adjustments to the telephone interview, pilot interviews were carried out on Wednesday 1<sup>st</sup> May. 27 interviews were achieved, and overall the process ran very smoothly. Agreement was reached with NRW on amendments to the interview to deal with the small number of minor issues which arose during the pilot.

Full interviewing commenced on 9<sup>th</sup> May 2013. A minor change was required in the routing of the questionnaire to deal with an issue which was arising with a small number of interviews. Interviewing was completed in July 2013.

Monitoring quotas were placed on two key factors: Convergence vs. non-Convergence areas, and tourism sector. In the case of the former, the monitoring quota related to length of the Wales Coast Path in and out of the Convergence area (87:13). In the case of the latter, the monitoring quota related to the characteristics of the known universe, as shown above in Table 2.1. As anticipated, the quotas proved to be challenging, particularly for the Service / hospitality and Retail sectors. However, strenuous efforts were made to come as near as possible to achieving them.

In order to adjust for a difference in sector quotas, it proved necessary to weight the sample prior to analysis. A technical note on sampling and weighting is included as Appendix Two.

## **2.6 The achieved sample**

A total of 1600 telephone interviews were completed. Characteristics of businesses included in the achieved sample are presented in Table 2.2, as follows:

**Table 2.2 Characteristics of achieved sample**

	Achieved sample of businesses			Research universe	
	Unweighted	Weighted	%		
<b>Total number of businesses</b>	1600			5407	
<b>Convergence / non-Convergence</b>					
Convergence	1390	1392	87%	4038	75%
non-Convergence	210	208	13%	1369	25%
<b>Sector</b>					
Accommodation	728	557	35%	1923	36%
Service / hospitality	501	646	40%	2155	40%
Retail	310	336	21%	1128	21%
Attraction / activity / other	61	61	4%	201	4%
<b>Distance to WCP</b>					
Up to 1km	1341	1351	84%	4285	79%
1km+	259	249	16%	1122	21%
<b>Urban-Rural</b>					
Urban	1072	1120	70%	4082	75%
Rural	528	480	30%	1325	25%

## 2.7 Availability of full findings

The findings of the survey are discussed in the following chapters. Full results have been provided to Natural Resources Wales by Beaufort Research Ltd.

### 3 Feedback from businesses along the Wales Coast Path

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In this Chapter, the general findings from the telephone survey of 1600 tourism-related businesses within 2km of the Wales Coast Path are presented. These include the understanding and awareness of the Wales Coast Path amongst individual businesses, and awareness of, and involvement with, publicity and promotion of the Path. Consideration is given to early indications of the response of businesses to the opening of the Wales Coast Path, including any reported impact on customer numbers, services and products introduced to encourage use of the Path, and participation in training in relation to the Path.

#### 3.1 Understanding and awareness of the Wales Coast Path

##### *Understanding of coastal paths in Wales*

Rather than introduce the Wales Coast Path itself as the subject of the telephone interview, businesses were first asked about their understanding of 'coastal paths in Wales'. Table 3.1 presents the choice made by businesses between four alternative descriptions of the status of coast paths in Wales.

**Table 3.1 Description chosen of status of coast paths in Wales**

Description	% selecting
They are joined up into one path	43%
Not joined up into one path but will be in the near future	20%
Not joined up into one path but will be in the long term	9%
Not joined up into one path and probably never will be	11%
Don't know/refused	17%

Less than half of all respondents chose the first and correct description. It is possible that some people may have chosen an alternative description because they felt it to be more accurate of the situation pertaining on their particular part of the Welsh coast. Natural Resources Wales and the local authorities are continuing to work together to make improvements to the alignment of the Path. Where an inland detour has been required, some may regard parts of the Wales Coast Path as technically not a coastal path.

However, variation between tourism sectors in their selection of the first description suggests that this may be more a question of awareness. Accommodation businesses and attraction/activity operators were more likely to select the correct description (52% in each case), while service/hospitality businesses (38%) and retail businesses (37%) were less likely to do so. Businesses in Mid-Wales were best informed, followed closely by South West Wales. Businesses opened within the last year were also better informed than those which have been established for a longer period.

##### *Awareness of the Wales Coast Path*

When asked whether they had heard of the Wales Coast Path, 79% of respondents, a large majority, indicated that they had. However, once again there was variation. 90% of accommodation businesses and 97% of attraction/activity operators had

heard of the WCP, while this fell to just over 70% for service/hospitality and retail businesses. This suggests a higher level of awareness amongst 'mainstream' tourism businesses. Small businesses (3 or less employees) were more likely to be aware of the WCP than their larger counterparts. Awareness level were higher amongst businesses in Mid Wales (88%) and South West Wales (83%) than in North Wales (77%) and Capital Region (67%). Awareness levels were higher amongst businesses in the Convergence area (81%) than in the non-Convergence area (66%).

Recollection of the length of time that had elapsed since the launch of the Wales Coast Path was not that strong. The opening in May 2012 was exactly one year before interviewing commenced, so the 26% of respondents answering 0-6 months were mistaken. A further 26% said that they did not know. Just 28% of respondents were correct in saying 12 months; an additional 2% who said 13-18 months may also have been correct if they were interviewed after May 2013. Some respondents felt that the Path had been open for much longer, which may indicate confusion in the minds of some with longer established routes such as the Pembrokeshire Coast Path.

### **3.2 Publicity and promotion of the Wales Coast Path**

The following questions were asked only of those 1295 businesses that had heard of the Wales Coast Path.

#### ***Awareness of promotion and publicity for the Wales Coast Path***

Of these, 63% had seen or heard of any publicity, advertising or information for the Wales Coast Path. Attraction/activity operators (70%) and accommodation businesses (67%) were most likely to report having seen or heard such publicity. There was almost no regional variation, nor any difference between businesses in the Convergence and non-Convergence areas. Smaller businesses were more likely than larger businesses to recall having seen or heard publicity for the WCP.

The most likely places to have come across publicity were on TV (43%)<sup>4</sup>, in a newspaper article (24%) or in a leaflet or booklet (16%). These channels aimed at broadcasting information to the general public were much more widely reported than direct promotion by any of the partners to the WCP. 6% mentioned a leaflet or booklet sent directly to their business. Just 3% reported seeing something in a destination or area visitor guide, 2% referred to the Wales Coast Path website and 1% mentioned Visit Wales or a Tourist Information Centre.

#### ***Reference by business to WCP in own marketing material***

Reference to the Wales Coast Path in their own marketing material is quite limited amongst businesses having heard of the WCP. Just 15% specifically mention the Wales Coast Path. This is most likely to happen in the accommodation sector, where 26% of businesses mention the Wales Coast Path in their marketing, and also in Mid Wales (20% of businesses).

A greater proportion of businesses (19%) refer to a coastal path in their marketing but do not specifically refer to the WCP. The highest incidence (28%) of this is in South West Wales, where it can be surmised that some businesses may refer to the

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<sup>4</sup> of those having seen or heard any publicity

Pembrokeshire Coast Path in preference to the Wales Coast Path. Again, this is most frequently seen amongst accommodation businesses, with 33% reporting that they mention a coast path.

Rural businesses are more likely than those in larger settlements to mention a coast path, including the Wales Coast Path, in their marketing. Almost one half (48%) of rural businesses report that they do this.

Amongst businesses specifically mentioning the Wales Coast Path in their marketing, it is most likely that the Wales Coast Path will form an important component (45%) rather than the main theme (6%) of their material. Roughly equal proportions of businesses give less exposure to the WCP, with 25% referring 'in some detail' to the WCP, and a further 23% make 'passing reference'. Businesses in rural areas are more likely to give prominence to the WCP, with 50% using it as an important component of their marketing and 7% using it as the main theme. Although only a small number of businesses in the non-Convergence area mention the Wales Coast Path in their marketing, these businesses are the most likely to use it as a main theme or an important component of their material.

### 3.3 Impact of the Wales Coast Path on customer numbers

Each of the 1295 businesses that had heard of the Wales Coast Path was asked if the opening of the Path had had an effect on the number of customers to their business. 23% reported that there had been an effect, equating to 18% of the whole sample. Service/hospitality businesses were most likely to have seen an effect (25%), followed by accommodation businesses (23%) and attraction/activity operators (23%). Retail businesses were least likely to have seen an effect (19%). Considering variation between regions, the highest proportion of businesses reporting a change in the number of customers was in Mid Wales (36%). Businesses closest to the Path were most likely to have seen a change: 24% of businesses <1km from the Path compared with 20% of businesses 1-2km away. Rural businesses were also more likely than businesses in larger settlements to report a change: 27% compared with 21%.

The nature of the change reported by businesses is shown in Table 3.2.

**Table 3.2 Effect of opening of WCP on number of customers**

Nature of reported change	Number	%
Reporting any change (weighted)	291	100%
Increased a lot	42	14%
Increased a little	234	80%
Decreased a little	5	2%
Decreased a lot	2	1%
Don't know	8	3%

Base: those reporting any change in response to opening of WCP

Amongst businesses reporting a change, 95% reported an increase while 2% reported a decrease. The most common change, reported by 80% of businesses, was 'increased a little'. However, 14% reported that the Wales Coast Path had had a significant effect on the number of customers, which had 'increased a lot'. This is equivalent to 2.6% of the total sample of 1600 businesses interviewed.

Businesses in the accommodation sector were most likely to have seen a significant increase: 19% reported that customers had 'increased a lot'. This was followed by

attraction/activity operators, with 15% reporting 'a lot' of increase in customer numbers. Businesses in North Wales (16%), the Convergence area (15%) and rural areas (16%) were slightly more likely to have seen 'a lot' of increase. For some reason, businesses more than 1km from the Path had also seen a greater increase than those closer to the Path. This may come down to the individual businesses involved.

### 3.4 Introduction of new services relating to the Wales Coast Path

Businesses that had heard of the Wales Coast Path were asked whether they had introduced any new services or products for their customers to help or encourage them to use the Wales Coast Path. To date, the introduction of new services has been quite limited, with 84% of businesses reporting that they have introduced no new service.

In some cases, this was because the business was on a section of the WCP that was well established and they had already been providing for walkers for some time. Others had an intention to do something, but were waiting on final alignment of the route.

*No not until the bits by me are open (Accommodation, Neath Port Talbot)*

However, this leaves 16% of businesses that have introduced a new service to help or encourage use of the Wales Coast Path. Accommodation businesses are most likely to have done this; 24% of accommodation businesses reported some new activity.

The most frequently mentioned service was giving out or offering information/maps/booklets/leaflets/guides about the Path, mentioned by 6% of businesses and 9% of accommodation businesses. Information about the range of new services offered is presented in Table 3.3.

**Table 3.3 New services or products introduced to support use of WCP**

Service or product introduced	Number of businesses offering
Give out or offer information/maps/booklets/leaflets/guides	80
Encourage walking/to go walks/tell customers about Path	24
Offer books on it	15
Provide storage for walking gear/bikes etc	12
Dry their clothes/provide drying facilities	12
Packed lunches	11
Pick up and drop off service for customers	11
Offer tea/coffee/sandwiches/refreshments to walkers	10
Publicise Path on website	8
Arrange transfer of luggage	8
Discount for walkers	7
Involved with Walkers Welcome	5
Changed menu	5
Use more Welsh produce	4
Make facilities available to walkers	4
Walking holidays	2
Others	21

Information was the service most commonly provided to customers. This often took a more traditional form...

*Placed guides in the property and Ordnance Survey maps, also guided runs (Service / hospitality, Ceredigion)*

*Sell coastal maps (Retail, Swansea)*

*Print out local sections of the path (Accommodation, Gwynedd)*

...but some businesses are supporting use of new technologies.

*Sign in the window that customers can scan with their phones and get connected to the Coast Path website. (Service / hospitality, Monmouthshire)*

24 businesses in all had provided dedicated spaces for drying or storage. This included provision for cyclists in those parts of the WCP which were accessible for cycling. There were also some interesting add-ons.

*Offering a clothes drying facility, spa in the garden, cleaning shoes, information on what's available locally. (Accommodation, Ceredigion)*

*In process of building an all-weather area for drying clothes etc (Accommodation, Isle of Anglesey)*

*Place to keep bikes. Cleaning shoes. Lend walking sticks. (Accommodation, Ceredigion)*

Several businesses mentioned services related to food and drink. Packed lunches were most frequently mentioned, but also serving different kinds of food at different times, and also the introduction of local specialities.

*We have introduced new things on the menu with walkers in mind. Because walkers don't always want a full meal (Service / hospitality, Gwynedd)*

*No nothing in particular, but we have changed what we sell. Picnic boxes to encourage people to go on trips/journeys, go walking and so forth. (Retail, Gwynedd)*

*We do a Welsh Dragon sausage and burgers and Welsh bacon (Retail, Carmarthenshire)*

*New St. David's pasty (Retail, Pembrokeshire)*

*Added new Welsh ale (walkers have asked for ale) (Service / hospitality, Pembrokeshire)*

Transport services for both luggage and walkers were mentioned. As well as a pick-up and drop-off service, businesses make a point of providing information about public transport.

*We get the taxi to bring their bags so they can enjoy the walk without luggage. (Accommodation, Ceredigion)*

*Collection at bus and train stops. We're right at the end of the coastal path. (Accommodation, Monmouthshire)*

*We have the Visit Wales walkers sign and bus timetable which we got in preparation for the Coastal Path (Accommodation, Carmarthenshire)*

Several businesses made a point of mentioning that they have made their customer facilities publicly available to walkers.

*We encourage them to use the toilets and café - we have brand new signs that show the paths. (Accommodation, Gwynedd)*

*There's a car park in back of pub but it's private so I'm going to make it public for the walkers to encourage them to park there. They can leave their car somewhere safe. (Service / hospitality, Monmouthshire)*

Some businesses have been particularly creative in the services that they have introduced.

*Reduced rate for campers who have walked, cycled or used the shuttle bus to come to us (Accommodation, Pembrokeshire)*

*Made a pathway to the Coast Path from our hotel. (Accommodation, Gwynedd)*

*I took a boat of ramblers by sea to Penguin Point and then they went on Coastal Path. They are doing it again this year so I have a new route on my boat trip to get them on the coastal path (Attraction / activity / other, Isle of Anglesey)*

*Dog poo bags for walkers (Accommodation, Isle of Anglesey)*

Several businesses have been accredited under the Walkers are Welcome scheme or have become involved with one of the Walkers Welcome towns that are springing up along the WCP.

*Joined Walkers Welcome in Chepstow. They're excellent. (Accommodation, Monmouthshire)*

*We've become part of Walkers Welcome and make sure walkers are catered for. We have maps and things. (Accommodation, Gwynedd)*

### **3.5 Participation in training related to Wales Coast Path**

Just 17 businesses reported having that they or their staff had undertaken any training in response to the opening of the Wales Coast Path. Six businesses referred to attending a workshop or course specifically related to the Wales Coast Path, a mixture of product familiarisation and training tailored to maximising the benefit to individual business. Two other businesses had attended training in relation to the Wales Coast Path website.

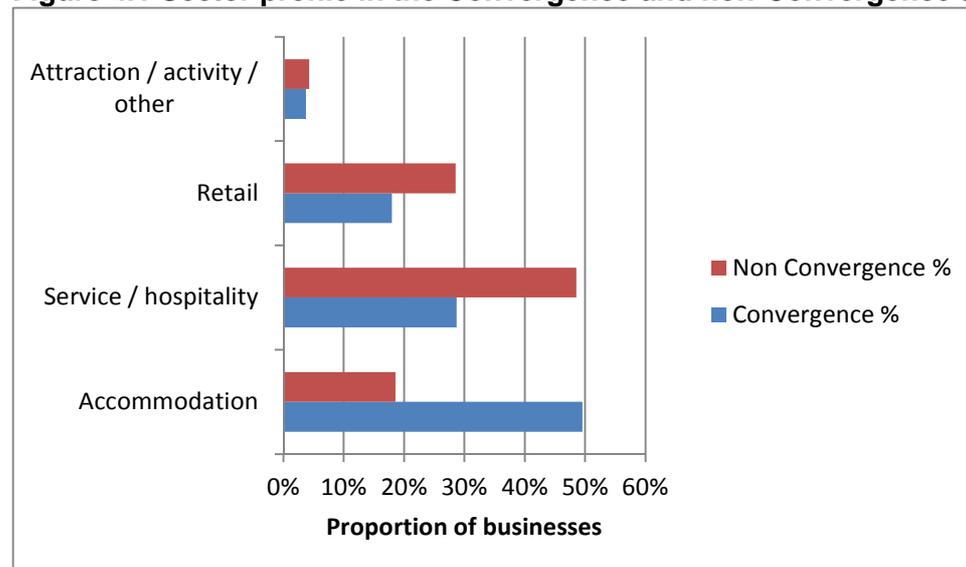
## 4 Business response to the Wales Coast Path

In this Chapter, information is presented on the economic profile of the 1600 tourism-related businesses in the WCP zone that took part in the survey. Consideration is given to the impact of the Wales Coast Path on the businesses, looking in turn at any reported change in opening times, staffing levels and hours worked, and at capital investment made. Information is also presented on a short investigation of enterprises identified as newly opened. Based on all of the findings, a calculation is made of additional jobs and additional enterprises that can be attributed to the Wales Coast Path in the Convergence area. These results are then grossed up give an estimate of the impact on all tourism-related businesses in the Wales Coast Path 2km zone. Finally, an assessment is made of whether WEFO indicators have been met within the Convergence area.

### 4.1 Economic profile of sampled businesses

Figure 4.1 shows how the profile of sampled businesses differs by sector in the Convergence and non-Convergence areas.

**Figure 4.1 Sector profile in the Convergence and non-Convergence areas**



It can be seen that accommodation businesses are more strongly represented in the Convergence area while in the non-Convergence area, service/hospitality and retail businesses are more strongly represented.

### **Employment**

Businesses were asked about the make-up of their workforce, broken down by permanent full and part-time members of staff (including owners) and by seasonal employees. Table 4.1 shows the employment profile of the businesses. The number

of full time equivalent jobs (FTEs) is calculated by assigning 2 P/T jobs as 1 FTE<sup>5</sup>, and adding, where relevant, the number of seasonal employees by the % of days worked per year.

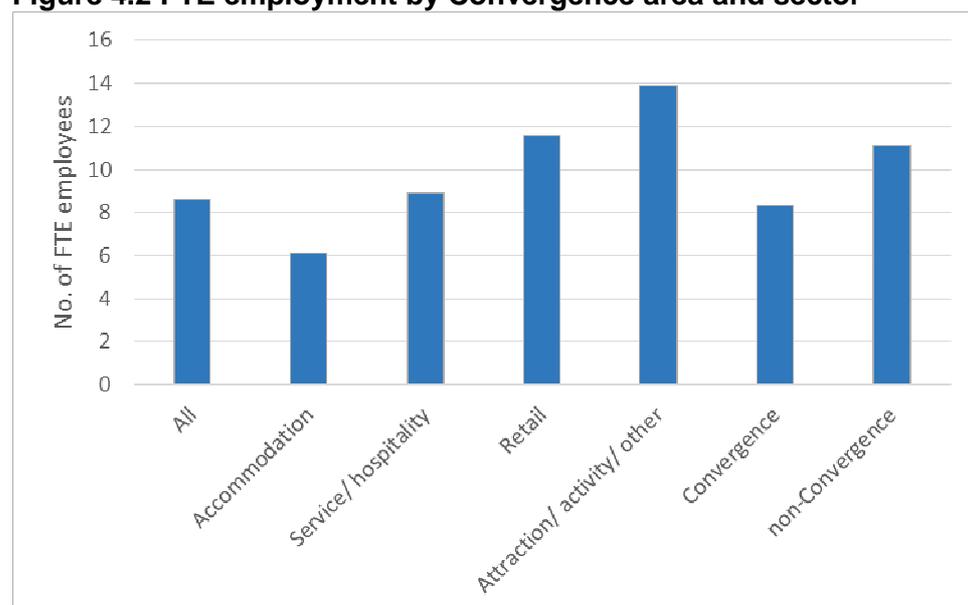
**Table 4.1 Full time, part time and seasonal employment in WCP businesses**

	All	Accommodation	Service / hospitality	Retail	Attraction / activity / other	Convergence	non-Convergence
Permanent F/T employees	5.8	4.4	5.7	7.7	8.8	5.6	6.9
Permanent P/T employees	5.0	2.7	5.6	7.4	5.4	4.7	7.1
Seasonal employees	1.8	1.4	1.8	1.3	9.7	1.7	2.5
Seasonal days per year	78	88	72	73	91	76	97
FTEs	8.6	6.1	8.9	11.6	13.9	8.3	11.1

Note: 2xP/T = 1 FTE; % of 365 days x seasonal employees = 1 FTE

On average the employment in businesses within 2 km of the Wales Coast Path (WCP) is 8.6 full time equivalent jobs (FTEs). By sector this varies between 6.1 FTEs for accommodation businesses to 13.9 FTEs for businesses in the attraction/activity sector. The information is summarised in Figure 4.2.

**Figure 4.2 FTE employment by Convergence area and sector**



<sup>5</sup> The brief requires that jobs should be reported as Full Time Equivalents (FTEs), based on a 30 hour week. There may be considerable variation in actual part time hours. However, the assumption has been made that on average each part time job is 15 hours per week.

The fact that, on average, businesses outside the Convergence area have a greater number of FTEs than those within the Convergence area can be attributed to the differing profiles of businesses in the two areas, as shown above in Figure 4.1.

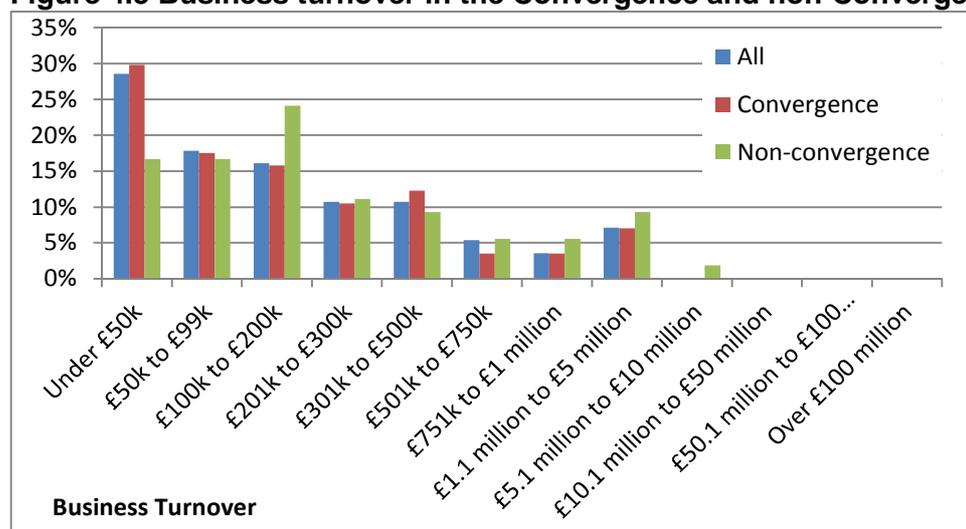
### Turnover

As with most tourism businesses, the majority of businesses in the WCP area are small. Excluding the 43% of businesses who were unable or unwilling to provide turnover information<sup>6</sup>:

- 84% of those providing information have a turnover of up to £0.5m
- 46% of those providing information have a turnover of up to £0.1m

Figure 4.2 shows the turnover profile of businesses in the Convergence and non-Convergence areas. Overall, there is little apparent difference. However, businesses with a turnover in the £100,000 to £200,000 band are more strongly represented in the non-Convergence area, while those with a turnover under £50K are more strongly represented in the Convergence area. Again, this is likely to be accounted for by the difference in sector profile between the two areas.

**Figure 4.3 Business turnover in the Convergence and non-Convergence areas**



## 4.2 Impact of the Wales Coast Path on tourism businesses

As set out in Section 3.3, 18% of all businesses surveyed reported that the opening of the Wales Coast Path had had an effect on the number of their customers. Of these, 95% were reporting an increase in customers and just 2% a decrease. In response to this interest, some businesses have reported an impact of the WCP in terms of changes in their opening periods, staffing levels, hours worked and capital investment in the business.

### Opening periods

Few businesses reported that they had changed the period that they were open in response to the WCP – just 15 businesses out of the 1,600 surveyed (1%). All

<sup>6</sup> This issue is common to many quantitative business surveys

except one were in the Convergence area. 8 were service/hospitality businesses, 4 were accommodation businesses and 3 were retailers.

The most common change was to open for more hours of the day (11 businesses). Two businesses had opened for more days a week, and a further two were opening for more weeks in the year. One business was open for fewer hours a day. The non-Convergence business that had changed its opening period was a service/hospitality which had opened for more hours per day.

### **Staffing**

14 businesses reported a change in the amount of staffing in response to the WCP, just 1% of those surveyed. Amongst these, the average change was an increase of 2.6 members of staff. 13 of the businesses that had changed their staffing were in the Convergence area and amongst these the average change was an increase of 2.83 staff.

The staff increases were typically in service/hospitality businesses (9 out of 14), although some were also in accommodation and one was a retail business. The increases were spread across the range of business sizes.

### **Hours worked**

Few businesses reported that they had changed the hours worked by staff in response to the WCP – a total of 17 businesses out of the 1,600 surveyed (1%). Of these, 16 were in the Convergence area and 12 were service/hospitality businesses, 3 were retailers and 2 were accommodation businesses.

15 out of the 17 that had changed the hours worked by staff had seen an increase in hours, by an average of 7.65 hours per week. In the Convergence area, the increase was slightly higher, at 8.36 hours.

2 businesses, both in the Convergence area, had decreased staff hours by an average of 4.14 hours. One business was a retailer and the other was an accommodation business.

The net effect of the changes in hours worked by staff for the 1% of businesses making changes is an increase of 7 hours per week per typical staff member<sup>7</sup>.

### **Capital investment**

20 businesses in total had undertaken some capital investment in response to the WCP (1%). Typically the businesses that had invested were small (half had three members of staff or less). Two thirds were accommodation businesses, and almost one third were service/hospitality businesses. However, there was evidence of investment in all sectors except retail and across most sizes of business. 18 of the 20 businesses that had made capital investment were in the Convergence area.

Of the businesses that had invested, the average investment made was £134,000 although it should be noted that the investments reported varied considerably, including four of less than £5,000. Investments in the non-Convergence area were

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<sup>7</sup> This calculation uses the unweighted total responses for the affected businesses

on average smaller than in the Convergence area, although the small numbers involved mean that this is not necessarily part of a wider pattern.

### 4.3 Performance against indicators

#### *Targets*

The client asked for an investigation of whether the Wales Coast Path had successfully achieved the following indicators:

- 8 gross additional jobs created
- 2 additional enterprises created

The brief for the study requires caution to be exercised in determining attribution of employment and new enterprise impacts. Jobs are defined as new posts expected to exist for at least 12 months that did not exist prior to the Structural Fund activity. This does not include jobs which have been relocated. The brief requires that jobs should be reported as Full Time Equivalents (FTEs), based on a 30 hour week. The indicators relate to that part of the WCP that falls within the Convergence area.

#### *Method for determining performance against indicators*

##### *Additional Employment*

The primary method for determining additional jobs created operates at two levels:

- **The first level** considers the responses from the businesses surveyed and totals any additional employment reported in the Convergence area. This figure is adjusted to take account of part time and seasonal working based on the existing pattern of employment across the businesses in the WCP area, in order to arrive at FTEs.
- **The second level** extrapolates the total across the known universe of businesses in the Convergence area, adjusted by business type. Given that the information from the first level is from a sample survey, this is a logically correct approach but is dependent upon the assumption that businesses that were not surveyed have the same characteristics and experience of the WCP as those that were surveyed. There is nothing to suggest the existence of any such differences but, in the context of the guidance from the brief, this may be seen as a less cautious approach.

Additional employment is also created through increasing the hours of existing staff. This has been calculated by adding together the responses from the 16 businesses that reported a change in the hours worked by staff, with adjustment to take account of seasonal working. This produces an estimate of total extra hours which can then be divided by 30<sup>8</sup> to provide an estimate of additional employment, based on the assumption that the extra hours are a permanent change worked over the whole year.

##### *Additional Enterprises*

The method for identifying additional enterprises created draws upon the following sources of information:

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<sup>8</sup> With 30 hours taken as the threshold for a full time week

- Self-identification of businesses less than one year old from respondents to the survey.
- Suggestions invited from survey respondents about any new businesses that they were aware of in the vicinity of the Wales Coast Path.
- Interviews with local authority tourism officers.

In total, details were assembled of around 80 possible businesses. Concentrating on businesses within the Convergence area, and those identified through web searches as ‘best prospects’, a target group was identified of businesses that had opened within the last year or are planned to open. It was decided that the only way to associate any additional business with the advent of the Wales Coast Path was to ask the person who made the original decision to open the business in that location.

20 businesses less than one year old were identified from the database along with 22 businesses identified by survey respondents and 7 businesses identified through tourism officer interviews. Businesses identified through this process were then approached by telephone and/or email to determine the extent to which the WCP had played a part in the decision to start the business or locate it in that particular location. A total of 37 responses were gained from the 49 businesses.

Responses were scored as shown in Table 4.2.

**Table 4.2 Attribution scores for new businesses**

Response: The Wales Coast Path was...	Score
...the main reason for starting up the business in this location	100%
...one of the most important factors in starting a business in this location	50%
...part of a range of reasons for starting a business in this location	25%
...of minor importance only	10%
...of no discernible importance	0%
...not aware of WCP or not serving relevant market	0%

### ***Calculation of additional employment***

#### *First Level*

A total of 41 additional jobs were reported in the Convergence area. Of these, 31 came from service hospitality businesses and 9 came from accommodation businesses.

The pattern of full time, part time and seasonal employment reported by tourism-related businesses in the Convergence area, indicates that a FTE is 69% of an actual job (which can also be expressed as 1 FTE being equivalent to 1.45 actual jobs).

This varies by sector, as detailed in table 4.3 below.

**Table 4.3 Actual and FTE jobs in the Convergence area by sector**

Average employment by sector		Accommodation	Service / hospitality	Retail	Attraction / activity / other	All
A	Permanent F/T employees	4.11	5.67	7.6	9.58	5.6
B	Permanent P/T employees	2.45	5.72	6.85	5.24	4.67
C	Seasonal employees	1.25	1.62	1.2	11.01	1.74
D	Seasonal days per year	87.53	65.52	76.56	92.88	76.04
E	2xP/T = 1 FTE (B); % of 365 days (D/365) x seasonal (C)= 1 FTE	5.6	8.8	11.3	15.0	8.3
F	total actual jobs (A+B+C)	7.81	13.01	15.65	25.83	12.01
G	FTE as % of actual (E/F)	72%	68%	72%	58%	69%

These conversion coefficients have been used to adjust the 41 gross reported jobs into reported FTE jobs, as detailed in table 4.4.

**Table 4.4 Actual and FTE additional jobs in the Convergence area**

Employment change by sector	Accommodation	Service / hospitality	Retail	Attraction / activity / other	All
Reported actual additional jobs	9	31	1	0	41
Reported FTE additional jobs	6.5	21.0	0.7	0.0	28.2

Applying this adjustment it is estimated that the 41 gross additional jobs reported in the Convergence area are equivalent to an additional 28.2 FTE jobs.

### *Second Level*

These findings can be extrapolated across the known universe of businesses in the WCP zone, in the Convergence area and for the whole of the WCP<sup>9</sup>. The 28.2 FTEs reported by 1390 respondents in the Convergence area are equivalent to an additional 0.02 FTEs per business. The coefficient varies between business sectors. Grossed up by the known number of businesses in the WCP zone, it can be estimated that total new employment arising from the WCP is 77.8 FTEs in the Convergence area and 112.1 FTEs across all of the WCP zone. This is shown in Table 4.5.

<sup>9</sup> See Table 2.1

**Table 4.5 Estimated additional FTE jobs resulting from additional staff employed, for the Convergence area and the whole WCP zone**

Sector	Accommodation	Service / hospitality	Retail	Attraction / activity / other	All
Average FTEs per business	0.012	0.040	0.003	0.000	0.0203
Known businesses in Convergence area	1761	1369	741	167	4038
Known businesses in non-Convergence area	162	786	387	34	1369
Total WCP businesses	1923	2155	1128	201	5407
Estimated additional FTEs in Convergence area	21.5	54.4	1.9	0.0	77.8
Estimated additional FTEs in non-Convergence area	2.0	31.2	1.0	0.0	34.2
Estimated total additional WCP FTEs	23.5	85.6	2.9	0.0	112.1

Note that this applies to tourism-related businesses within 2km of the path, as required by the brief. It is likely that there will be further impacts in other locations in Wales.

#### *Additional hours*

In addition to the additional jobs created, the WCP has resulted in some businesses increasing the hours work by staff. 14 businesses increased the hours worked by staff and 2 businesses reduced the hours worked by staff. Although businesses were asked what the change in hours was for a typical staff member, a review of the data suggests that the reported change (a net increase of 7 hours per week for a typical staff member in the business making a change) might apply only to a subset of staff. Without a clear foundation on which to apply the additional hours worked, it would not be cautious to extrapolate this into FTEs<sup>10</sup>. Therefore while it is noted that there has been an increase in staff hours for some businesses as a result of the WCP, this effect has not been used as part of the estimates of additional employment to assess performance against the WEFO indicators.

<sup>10</sup> The brief requires a cautious approach to be taken in attributing employment impacts.

### ***Additional enterprises***

50 tourism-related businesses were identified as likely candidates to have recently opened within the WCP zone and also in the Convergence area. Information provided by the 39 responding businesses indicates that the WCP has had some impact in generating new enterprise. While for the majority of new businesses identified the WCP has played no significant role in the decision to start the business, it has been the main reason for one business, part of a range of reasons for seven businesses and of minor importance for five businesses.

Using the scoring system set out in Table 4.1, it is estimated that this is equivalent to the creation of 4.0 new enterprises. This is shown in Table 4.6.

**Table 4.6 Role of WCP in decision to create new enterprises**

Response	Score	Number of responses	Enterprises created
Main reason for starting up the business in this location	100%	1	1
One of the most important factors in starting a business in this location	50%	2	1.0
Part of a range of reasons for starting a business in this location	25%	6	1.5
Of minor importance only	10%	5	0.5
Of no discernible importance	0%	20	0
Not aware of WCP or not serving relevant market	0%	3	0
<b>Total enterprises created</b>			<b>4.0</b>

## **4.4 Summary and assessment of indicators**

### ***Additional employment***

The 1600 businesses contacted as part of this study reported that 41 extra staff were employed as a result of the WCP, equivalent to 28.2 FTEs. This exceeds the WEFO indicators of 4 additional FTE jobs.

In addition it is estimated that 1% of businesses have increased the hours worked by staff as a result of the WCP. For those businesses, it is estimated that the net effect is an additional 7 hours per week worked for those staff affected.

It is possible to extrapolate these employment findings to the rest of the WCP businesses in the Convergence area and along the whole of the WCP zone. It is estimated that WCP businesses in the Convergence area have created an additional 77.8 FTEs through taking on additional staff as a result of the WCP. Along the whole of the Wales Coast Path, the total is 112.1 FTEs. This is shown in Table 4.7.

**Table 4.7 Estimate of total additional FTEs in Convergence and whole WCP zone**

Location	FTEs created through additional staff employed
Additional employment reported by 1390 businesses surveyed in the Convergence area	28.2
Estimated additional employment in businesses identified in Convergence area	77.8
Estimated additional employment in businesses identified in non-Convergence area	34.2
Estimated additional employment in all WCP businesses	112.1

***Additional enterprises***

4.0 new enterprises have been identified within the Convergence area which can be attributed to the Wales Coast Path. This exceeds the WEFO indicator of 1 additional enterprise. Within this, the Wales Coast Path has been the main reason for the creation of one new enterprise and has played a lesser role in 13 other new businesses.

## 5 Gaining future business benefit from the WCP

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This Chapter presents some of the thoughts and ideas expressed by tourism-related businesses about future opportunities for gaining benefit from the Wales Coast Path. Consideration is first given to business expectations about any change in the importance of the Wales Coast Path to their future success, and the factors that might drive that change. The businesses' own ideas are then presented about things that they would like to see happen in the future which would make it more likely that they will benefit from the opening of the Wales Coast Path.

### 5.1 Importance of the WCP to future business success

#### *Anticipated change in importance*

The 1295 businesses that were aware of the Wales Coast Path were asked whether they considered that there would be any change in future to the importance of the Wales Coast Path to the success of their business. Just 1% of businesses thought that there would be a decrease in the importance of the WCP to their business; 53% of businesses thought that there would be no change, and a further 6% did not know.

However, 40% considered that the WCP would become more important in future to the success of their business. This equates to 32% of all businesses taking part in the survey.

Attraction/activity operators were the most likely to consider that the WCP would become more important to them (60%), followed by accommodation businesses (43%). But over one third (36%) of service/hospitality and retail businesses also thought that this would be the case. Rural businesses were more likely than businesses in larger settlements to be optimistic about the future importance of the WCP, with 52% of rural businesses considering that it would become more important to the success of their business compared with just 34% of businesses in larger settlements. There was hardly any difference based on distance from the Path. The newest businesses were most likely to consider that the Path would become more important: 59% of businesses less than 1 year old felt this to be the case. Businesses in the Convergence area were more likely to place hope on the WCP (41%) than those outside the Convergence area (35%).

#### *Reasons for future change*

Asked to elaborate, a wide range of reasons were given by businesses expecting to see the Wales Coast Path becoming more important in future to the success of their business.

#### *Expectations of change*

Some had already experienced an upturn in business and felt that this would at least be sustained and was likely to grow.

*We are not so much off the beaten track anymore. (Service / hospitality, Conwy)*

*More keen walkers - a chap downloaded the Path on his ipad this morning*

*(Accommodation, Isle of Anglesey)*

*With the Path, we noticed an increase in tourists (Accommodation, Carmarthenshire)*

*More walkers this year, big companies organising trips (Accommodation, Ceredigion)*

Some businesses believe the Wales Coast Path to be a significant new product that will drive business in its own right. They are ambitious about what the Path can do for them.

*Internationally the Welsh coast will become an important tourist attraction. Wales has a beautiful coastline that is undiscovered for most people (Accommodation, Pembrokeshire)*

*It should be integral to tourism in Wales. (Accommodation, Conwy)*

Others are simply hopeful about what they expect the Wales Coast Path to deliver.

*I'm hoping it will increase the number of people coming. I think the Path is a great thing. I think it is the best use of public money the Welsh Assembly has ever spent and in our area it has enhanced the area and trade so I am very happy about the path being opened (Accommodation, Gwynedd)*

*Because our caravan site is right next to the Path so people will stay here with the view to walking (Accommodation, Ceredigion)*

*Hoping that more walkers pop in for a sandwich (Retail, Gwynedd)*

*A lot of it is word of mouth, walkers telling their friends 'you must go and do that walk, it's fantastic'. At least 50% of our business is repeat business and I think that will happen with the rest of Wales when a few people have walked it. (Accommodation, Pembrokeshire)*

*We're a tourist town but there should be more people due to the Path (Accommodation, Gwynedd)*

*Hopefully more visitors coming through village (Retail, Pembrokeshire)*

#### *Drivers of change*

The main perceived driver of expected change in business arising from the Wales Coast Path relates to observed market trends.

*Profile of Wales is increasing. Walking is becoming more popular. The best of its kind in Europe and over the world. (Accommodation, Pembrokeshire)*

*More people are into walking and fitness nowadays, so places like here will benefit. Businesses are realising this. (Service / hospitality, Gwynedd)*

*Because popularity of holidaying in the UK is increasing. People are seeking fresh*

*air environment for days out (Service / hospitality, Vale of Glamorgan)*

Certain businesses also have an expectation that the walking market has particular characteristics which are likely to be of benefit to them.

*They're the type of people we want to shop here. Walkers tend to love food! (Retail, Ceredigion)*

*Because we're open on Sunday and a lot walk on Sundays (Service / hospitality, Isle of Anglesey)*

*Hoping to get a younger clientele (Accommodation, Conwy)*

*Walkers keep us going through the winter. (Retail, Gwynedd)*

*Because it's a beautiful area and I think with more promotion it will bring a lot more people into the area. People are walking in any weather now as well rather than just in fine weather (Service / hospitality, Vale of Glamorgan)*

#### *Conditional optimism*

Quite a few businesses tempered their optimism with a caution or a condition. Their expectation of future business benefit from the Wales Coast Path was contingent on certain things happening.

Some were waiting, or looking, for an infrastructural improvement.

*We are right on it and when they put the bridge in over the Dwyfor that will be a major factor to bring more people to us (Accommodation, Gwynedd)*

*They will be using it but at the moment bits are not open (Accommodation, Neath Port Talbot)*

*If you access it from our site it would be good. At the moment we have a dangerous road between us and the Path so it's very difficult and not appealing for our customers to cross over (Attraction / activity / other, Isle of Anglesey)*

Others were looking for sustained or improved promotion of the WCP.

*It depends on how much they push the Path - it could make a difference but it won't unless we get help. (Service / hospitality, Pembrokeshire)*

*We get walkers who come for the Wye Valley Walk and if there was more advertising for the Coastal Path then I would get more customers (Service / hospitality, Monmouthshire)*

*Only if it was promoted better (Retail, Carmarthenshire)*

A final group of businesses felt their own future success to be tied up with the actions of others in both the private and public sector.

*If other businesses stay open longer. The local cafe is only open some weekends. (Accommodation, Isle of Anglesey)*

*In Chepstow they're opening a hostel, marketed towards walkers and travellers. We're next door so perfectly positioned to market the path (Service / hospitality, Monmouthshire)*

*As long as they keep the facilities open - public toilets- big off-put for walkers especially. (Accommodation, Pembrokeshire)*

*A proper bus service. Constant marketing. Continued maintenance of the path. (Accommodation, Ceredigion)*

#### *Future intentions*

Some businesses were sufficiently confident about future opportunities from the Wales Coast Path to be talking about a whole range of future plans for their business, from simple actions to significant investment.

*A lot more walking and the pub is on the Path so a part of it passes our front door. So the future of the path is definitely in our future plans (Service / hospitality, Gwynedd)*

*Because if we get more walkers or customers from the Path then we will be able to keep the business open for longer hours and have seasonal staff here so more jobs (Service / hospitality, Pembrokeshire)*

*We're opening a cafe right on the beach. (Attraction / activity / other, Isle of Anglesey)*

*Going to open a restaurant, many people use the Path by walking and cycling (Accommodation, Swansea)*

*We might buy more property in the area so it will become more important to the company (Accommodation, Swansea)*

#### *Challenging assumptions*

Finally, in commenting on why they did not expect that their business would see more benefit from the Wales Coast Path in future, two businesses made what may be a misplaced assumption. Their perspective may give a pointer to a need to broaden business understanding of how the Path is being, and will be, used.

*More people using it and more people coming to the area. It doesn't benefit self catering so much because people tend to come and stay for one night, so benefit more B&B's (Accommodation, Ceredigion)*

*More advertising could increase the numbers of walkers. The thing is, I don't really take people for just one night. I market to different people other than walkers - families or older people. (Accommodation, Gwynedd)*

## 5.2 Future action to increase likelihood of business benefit from WCP

Businesses were asked if there was anything that they would like to see happen in the future which would make it more likely that their business would benefit from the opening of the Wales Coast Path. 37% of businesses thought that there was nothing that would make it more likely that they would benefit from the WCP, or that it was not relevant to them. This rose to 48% of businesses outside the Convergence area.

However, 63% of businesses that had heard of the Wales Coat Path made a comment or suggestion in answer to this question, amounting to over 850 businesses.

By far the most frequent request was for more advertising or publicity, requested by 28% of businesses and 33% of accommodation businesses. Businesses that were more likely to make this request were those further away from the Path (30%), rural businesses (31%), larger businesses and those in mid Wales (36%).

The most frequently given responses are summarised in Table 5.1.

**Table 5.1 Most frequent ideas to increase likelihood of business benefit from WCP**

Comment/suggestion	Number of businesses	% of businesses
Nothing/not relevant	468	37%
More advertising/publicity	348	28%
More leaflets/literature information on Path	96	8%
Maps - various	40	3%
Make people aware of businesses near the Path	36	3%
Improve signage of Path	34	3%
Maintenance of Path	31	2%
Better transport service/links	29	2%
More advertising outside Wales	24	2%
Signs on Path directing customers to business	22	2%

Base: all businesses aware of the Wales Coast Path

Looking in more detail at the individual comments and suggestions, they can be broadly grouped as follows:

- Ideas about the positioning of the WCP as a product
- Practical actions to secure and sustain ease of use of the WCP
- Activity to build connectivity between businesses and the WCP
- Requests for stakeholders to work together to achieve the best outcomes from the WCP

These ideas are discussed below, supported by selected comments from individual businesses which have been chosen to illustrate a particular view or range of views.

### **Positioning**

A number of suggestions were made about how the Wales Coast Path should be positioned in order to gain economic benefit from investment in the asset. These comments related to thinking about the needs of different markets interested in the WCP, broadening the interest of the WCP, presenting the WCP as a year-round product, and not losing sight of the Path as a natural asset.

### *Needs of different markets*

*The continued advertising of the Path and its benefits making it sound easier to do for the casual 'strollers'. (Accommodation, Ceredigion)*

*Encouraging young people to walk the Path as it tends to be older customers (Service / hospitality, Isle of Anglesey)*

*More set up to the city. I am only 24. People do not know about it. I don't watch news and things like that, we go on social networks. They should target the young generation (Retail, Carmarthenshire)*

### *Broadening the interest of the Path*

*Advertising for things to do around the Path, not just walking, other businesses nearby could also benefit (Attraction / activity / other, Gwynedd)*

*More information about the villages and the history of the towns/villages that the paths go through. You need to highlight to tourists where they can go. There is so much history in Wales. (Accommodation, Gwynedd)*

*More advertising and little things like the pod of 4 orca whales that were seen, but there's been nothing in the news. You can see dolphins and porpoises but they seem to get very little publicity. (Accommodation, Gwynedd)*

### *Seasonal product*

*Advertising is needed. We need to promote the winter here. The Lake District is open all year round, so we could be too. The weather is better here also. All the shops/restaurants should be open too to encourage tourists to come here. (Accommodation, Gwynedd)*

*A longer season. Better shuttle buses. We might then consider staying open for more months of the year. (Accommodation, Pembrokeshire)*

### *Natural asset*

*Maintain integrity of the path as a natural feature - non urbanisation (Attraction / activity / other, Isle of Anglesey)*

*Because of the natural beauty of the area. There aren't many big attractions here. So this Coastal Path is perfect for getting people here and get people to realise the natural attractions we have here. (Accommodation, Ceredigion)*

*Don't disturb the natural environment too much (Service / hospitality, Pembrokeshire)*

### **Practical actions**

Securing and sustaining ease of use of the WCP itself was seen by many as important if their business was to gain future benefit. This group of comments relating to practical actions was by far the largest. It covered a range of issues connected to the route itself, to facilities and services along the route, and to information to support its use.

### *WCP as a route*

A number of comments were made about the route itself, the quality of its infrastructure and current and future maintenance.

*I think that the Path is not as well developed as people might think because it actually comes quite far inland and our visitors complain because they are forced to walk along the main road. (Accommodation, Gwynedd)*

*Maybe an improved Coastal Path. The feedback is that some parts are very muddy and some of it is a very boring walk (Accommodation, Ceredigion)*

*I would like it to be joined up properly and a bit more maintained. Better signage, signage here is poor - how to get onto the path or return routes etc (Service / hospitality, Gwynedd)*

*As long as the path is kept well then we should get business from it (Retail, Pembrokeshire)*

*I would like to know who to contact about the Path maintenance. Like cutting back the hedges and maintaining boggy patches, it would be good to have a contact locally about that. (Accommodation, Carmarthenshire)*

*There's sand all over the path, it's unusable. People can't walk on it. (Accommodation, Conwy)*

*Make sure they maintain it for access, very positive about it (Accommodation, Gwynedd)*

### *Facilities and services*

A group of comments related to the need for facilities and services along the route, now and in the future.

*We're on a bad part of the Path. On the main road in Carmarthenshire, and the problem is there's no toilets close by for 20 miles, no café and no pub either. (Accommodation, Carmarthenshire)*

*The Pembrokeshire coast is known for clean toilets and it would be a shame if they were closed. (Accommodation, Pembrokeshire)*

*But you need to get the loos opened, especially during the winter. (Retail, Ceredigion)*

*Keeping facilities open, more local buses as soon they get to September they cut the number of buses working and running (Accommodation, Pembrokeshire)*

*Bus services on Sundays, Sunday is an important walking day and there are no busses. (Accommodation, Ceredigion)*

*Keep the rural bus service going, it was launched as part of the Path opening and is aimed at cutting out difficult parts of the walk. After just a year they're planning on*

*discontinuing the service for some reason (Service / hospitality, Vale of Glamorgan)*

*Needs to have luggage transport scheme (Accommodation, Ceredigion)*

#### *Information*

A large number of comments related to the need for more and better information. Some businesses felt the need to be better informed themselves about the WCP, while others felt that any growth in use of the Path would be dependent on good information being available to encourage and guide future users.

*We need information on it to be able to share it (Retail, Isle of Anglesey)*

*More maps, publicity & information would be a help...I mean, I don't even know where this path starts or where it finishes... (Accommodation, Carmarthenshire)*

*If they could send some information on how far I was from the track itself then I could see if the distance was easily reached by people. (Service / hospitality, Swansea)*

*Flyers and maps we could display in our shop and cafe (Service / hospitality, Conwy)*

*Better markings and a nice simple map to find the Coast Path (Accommodation, Gwynedd)*

*Maps showing access point to the Path. Could show our area 10 miles long and all access points on that path. Be useful and ideal to have easy access points as people are struggling to find how to get onto the Path (Service / hospitality, Vale of Glamorgan)*

*Online access to walking maps and detailed information for guests (Accommodation, Pembrokeshire)*

*Link on our website to a portal. If they are staying in that area they could download a mobile app telling them where to walk, where to eat etc. (Accommodation, Pembrokeshire)*

*Be nice to get some literature and maps with the Path on them, we have to give out drawn version of the Coastal Path map. It would be brilliant to have some maps and literature. (Accommodation, Ceredigion)*

*Be nice if more people were made aware of the Path. If brochures were delivered here I would definitely be happy to put them up. A lot of people who stay with us a love wildlife and walking so it would benefit our business to be able to advertise it. (Accommodation, Ceredigion)*

*Yes, something concise to put on our website or a link to go on another website to give the customers more information. Information on the Coast Path around the whole of Wales as well as our area. (Accommodation, Pembrokeshire)*

## **Connecting with businesses**

A significant number of comments related to actions which businesses considered would directly support the likelihood of gaining benefit from the Wales Coast Path. Creating or improving the connection between an individual business and the Path was seen as an important opportunity, either physically or through information provided about the Path. Access to finance was also raised as an issue.

### *Physical connectivity*

Comments made about increasing physical connections between businesses and the Wales Coast Path included issues relating to individual businesses, and also issues relating to whole settlements.

*More maps specific to the Path, more signs along the Path to link businesses and villages inland to the coast (most people walk along the coast and don't know about the businesses or villages that are a mile or so inland) (Retail, Gwynedd)*

*Signposts saying 'B and B 100 yards along the Path' - I can see them walking the Path from my window, and it's a long walk to the next B and B, so I would be perfect (Accommodation, Gwynedd)*

*More signs on the path showing where the villages are (Service / hospitality, Carmarthenshire)*

*Having the Path link into other footpaths into villages in order to give those villages business (Service / hospitality, Gwynedd)*

*A few signboards at the entrance to the town indicating that the Coastal Path passes through the town, because that's not local knowledge; we don't feel a part of the Path, we think it stops on one side of us and starts on the other. (Attraction / activity / other, Pembrokeshire)*

*Better signage in the towns. Maps of the towns (Retail, Denbighshire)*

Many businesses commented on the importance of taking and creating opportunities to integrate information about individual businesses with information about the Wales Coast Path.

*Not unless there was marketing linking tourism providers with specific parts of the Coastal Path (Accommodation, Carmarthenshire)*

*It would be nice for walkers to get more information on walks, and stopping points where accommodation is available. (Accommodation, Pembrokeshire)*

*To be mentioned in their literature and/or have a link on their website and vice versa (Accommodation, Gwynedd)*

*Unless there was a website specifically for the Path and accommodation close to or on the Path (Accommodation, Isle of Anglesey)*

*Good to have accommodation providers on one website for the whole of Coastal Path so that every business is available for walkers to see. (Accommodation, Pembrokeshire)*

*Like to see the Welsh Assembly supporting local businesses through advertising and support the small villages. Anything they could do to help locally. (Retail, Isle of Anglesey)*

*Advertise my shop on your leaflets (Service / hospitality, Gwynedd)*

*More marketing of the Path and businesses along it (Service / hospitality, Isle of Anglesey)*

*They could advertise local businesses because not every business is on the Path (Service / hospitality, Bridgend)*

*It's up to businesses like ours to take advantage. It would be mutually beneficial to do cross marketing (Accommodation, Isle of Anglesey)*

#### *Access to finance*

A small number of businesses raised issues concerned with access to the finance required to support investment.

*Grants system needs to be a lot easier. We needed a grant for an extension for our B&B but it was so complicated. You need to simplify the system. We're graded by the Welsh tourist board so it should be much easier to get (Accommodation, Pembrokeshire)*

*More cash investment from Welsh Assembly. More grants for existing businesses as well as new businesses (Accommodation, Pembrokeshire)*

*We just need funding for a drying room and we want to extend our season. People need a room to dry their clothing (Accommodation, Gwynedd)*

#### **Overall support**

This group of comments relates to thoughts about how all of the stakeholders involved with the Wales Coast Path, at all levels, could work together to secure the greatest benefit from the investment that has been made. The most frequently mentioned activity was sustaining and improving promotion of the Wales Coast Path. A number of comments were made about the relationship between one specific area of the Wales Coast Path and the Path as a whole. The final group of comments related to finding the best way for all parties involved with the Wales Coast Path to organise how they work together in order to maximise their effectiveness.

#### *Promotion*

Promotion was the activity most frequently mentioned by businesses in thinking about what would make it more likely that their business would benefit from the opening of the Wales Coast Path. This includes some businesses who were not aware that the Wales Coast Path was open yet.

*It's a huge selling point for Wales and should be pushed a lot more. (Accommodation, Isle of Anglesey)*

*Generally more marketing. We are very impressed by the Path, but we could do with*

*more literature. Shout about it in the rest of the country! (Accommodation, Carmarthenshire)*

*Everyone knows South West Coast Path but not Wales (Service / hospitality, Cardiff)  
More advertising, explaining the variety in the Path and all the coastlines.  
(Accommodation, Isle of Anglesey)*

*Think it could be advertised more. We have a lot of walkers. Anything that can be done to advertise. Not only bays and things but this Path (Accommodation, Swansea)*

*What I find is that still only a few of the walkers realise that there is a Coastal Path all the way around Wales. It the first country in the world to have this and more people should be aware of it. (Accommodation, Gwynedd)*

*More advertising. Didn't know that the Wales Coast Path had actually opened. (Retail, Pembrokeshire)*

*Remember seeing something in the news a few years ago about the Coastal Path but hadn't heard anything since, so that's why I wasn't sure whether it was all joined up or not. (Service / hospitality, Vale of Glamorgan)*

*To advertise it more over the border. Target people outside of Wales who tend to spend more time here. The Ceredigion leaflet is excellent. Book a bus. Do other counties do that? (Retail, Ceredigion)*

*Keep up the publicity - the more people who know about it the better. Particularly in the Tourist Information Centres (Accommodation, Gwynedd)*

*More organised walks, we have a Walking Festival here (Service / hospitality, Denbighshire)*

*More publicity. We need someone like Julia Bradbury to walk it. (Accommodation, Gwynedd)*

#### *Specific destinations within the Wales Coast Path*

There is a realisation that attention can be gained through promotion of the whole of the Wales Coast Path. But there is also a concern that individual destinations or sections of the Path may be overlooked. This presents a dichotomy to those involved with promoting the Path. Some businesses in a destination with a well-established coast path, such as Pembrokeshire, feel that the Wales Coast Path will have little effect on them.

*I would have liked to see (the Visit Wales advert) mentioning the whole of the Coastal Path as it will affect my business more. It was just promoting a few areas which will not help. (Accommodation, Gwynedd)*

*Wales' publicity seems to focus on Pembrokeshire and the Lleyn peninsula rather than the other places (Accommodation, Gwynedd)*

*A localised leaflet is needed. A national leaflet is needed, which is set into a smaller leaflet. Marketing the different coastal paths. (Attraction / activity / other, Isle of*

Anglesey)

*Highlighting particular areas. Our activities are based in one place, so would be good to raise awareness of what's available in specific locations. (Attraction / activity / other, Pembrokeshire)*

*Probably there could be some tailored local advertising because they're advertising it as the Wales Coast Path but there could be advertising highlighting the stretch around Cardigan for the ramblers walking. (Retail, Ceredigion)*

*It would be nice if there was some sort of introduction to the path you're walking on, like 'welcome to the Conwy part of the Path'. I think it's too grand promoting it as one; obviously one continuous path is good but it could be useful being broken up in (Service / hospitality, Conwy)*

*Want the Pembrokeshire Path advertised not the Wales Path (Service / hospitality, Pembrokeshire)*

*We are on the Pembrokeshire Coast Path which has been open for 70<sup>11</sup> years and I deal with 8 to 10 walking holiday companies. I don't know whether or not this will change (Accommodation, Pembrokeshire)*

*No because we're on the Pembrokeshire Coast Path and the Wales Coast Path will have no effect. (Accommodation, Pembrokeshire)*

#### *Working together*

There is recognition that maximising the benefits of investment in the Wales Coast Path will require a number of different stakeholders to co-ordinate the way that they work together. Unsurprisingly, businesses see this in terms of their own relationships with WCP partners. Businesses appreciate that they have to play their own part, but they would also like to see a consistent message from the main stakeholders.

*Well I got an email from Partnership for Growth from Visit Wales. it basically said Visit Wales is focusing on promoting big businesses and not once did it mention promoting the Path and growing small businesses. I know walking is not the high end of the business. This email says they want to promote and develop luxury hotels and spas and that is where all the money will go. (Accommodation, Pembrokeshire)*

*People from the Wales Coastal Path could come to the Cardiff Waterfront Partners (marketers for businesses in the Bay) and promote the Path. (Retail, Cardiff)*

*Probably just a tighter working relationship between the Coastal Path and local businesses. (Accommodation, Isle of Anglesey)*

*Possibly other pubs and restaurants and advertise together (Accommodation, Conwy)*

*Well I suppose companies will start putting packages together (Accommodation, Swansea)*

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<sup>11</sup> The Pembrokeshire Coast Path opened in 1970. This was referred to incorrectly within the quote by the respondent.

*We would like to work with the advertising, 20% off for walkers on the Coastal Path for example (Service / hospitality, Carmarthenshire)*

*Making people more aware, we can do our own part there as well. (Accommodation, Monmouthshire)*

## 6 Conclusions and recommendations for future

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In this Chapter, we summarise the findings of the investigation into the benefits to business of the Wales Coast Path, consider the limitations of the exercise and look forward to actions felt likely to increase the likelihood of businesses gaining future benefit from the WCP.

### 6.1 Summary of findings

The 1390 enterprises contacted within the Convergence area as part of this study between them reported that 41 extra staff were employed as a result of the Wales Coast Path, equivalent to 28.2 FTEs. This exceeds the WEFO indicator of 4 additional jobs created. Based on these figures, it is estimated that an additional 112.1 FTEs may have been created along the entire Wales Coast Path.

4.0 additional enterprises have been identified which can be attributed to the Wales Coast Path within the Convergence area, exceeding the WEFO indicator of 1 additional enterprise created.

The Wales Coast Path has added a significant new product to the tourism assets of Wales, and its launch and promotion have raised the profile of Wales and its coastline as well as the Path itself.

More than 5400 tourism-related businesses identified within 2km of the route of the Path are well placed to derive benefit from those who are using the Path and the increasing numbers expected to do so in the future. 4000 of these businesses are located within the Convergence area.

At the end of its first year of being open, 79% of tourism-related businesses have heard of the Wales Coast Path. The figure was even higher amongst mainstream tourism businesses.

Despite the fact that nearly two thirds of tourism-related businesses had come across promotional activity for the Wales Coast Path, understanding of the state of development of the Path was more limited, and work remains to be done to get the message out to all businesses that the Wales Coast Path is open for business.

Tourism-related businesses are beginning to incorporate references to the Wales Coast Path into their own marketing material, but this is still quite limited. Where a coast path is already well established, businesses often continue to refer to the Path by its existing and better known name.

18% of tourism-related businesses are able to report that, just a year after opening, the Wales Coast Path has had an effect on the number of customers to their business. One in seven of businesses reporting a change stated that customers had 'increased a lot'.

16% of businesses having heard of the Wales Coast Path have introduced a new service or product to encourage or support its use amongst their customers.

A limited number of businesses have also responded by increasing the period for which they are open, increasing staffing levels and/or hours worked and, in some cases, making a capital investment in the business.

Looking to the future, 32% of all businesses taking part in the survey considered that the Wales Coast Path would become more important in future to the success of their business. Reasons for this optimism included experience to date, ambition for the future, observed market trends and particular characteristics observed in the walking market. Not all optimism was unconditional. Some was contingent on certain things happening, including infrastructural improvements, sustained or improved promotion of the Wales Coast Path or the actions of others in both the private and public sectors.

## **6.2 Limitations of the study**

The Wales Coast Path is still in its infancy, and it is early days to expect to see the full effect of any response from business to new opportunities arising from the opening of the Path. Going forward, it can be expected that awareness will increase amongst businesses as well as amongst potential users.

The difficulty of attributing new business development to investment in the Wales Coast Path will remain challenging. Attention was drawn in Chapter Two to the fact that it will only ever be possible to measure an owner or manager's perception of the impact of the Path, which will be coloured by their awareness and understanding of the Wales Coast Path, and their ability to separate its impact on their decisions from the wider effect of proximity to the coast in general. Where a coast path is already well-established, there is the additional challenge of considering any value added by its incorporation into the all-Wales Coast Path.

Too late to give a 'before' picture and perhaps too early to be expected to provide a realistic assessment of business benefits arising from the opening of the Wales Coast Path, this assessment is not quite 'ex ante' nor 'ex post'. In the absence of any 'before' information, it may have a part to play as an early baseline assessment on which to base any future evaluation.

This study does not account for the full range of benefits to business arising from the opening of the Wales Coast Path. As required by the brief, interest has been limited to those tourism-related businesses within 2km of the Wales Coast Path. Additional benefits can be expected to have arisen, and will continue to arise, to businesses outside this zone.

## **6.3 Maximising future benefits to business**

Going forward, individual businesses wish to see continued and growing benefits to business arising from the Wales Coast Path. Between them, they have identified the following actions that they believe will increase the likelihood of such an outcome.

### *Positioning the WCP as product*

The Wales Coast Path should be well positioned in order to maximise the economic benefit to be gained from investment in the asset.

Relevant actions relate to:

- Thinking about the needs of different markets interested in the WCP
- Broadening the interest of the WCP
- Presenting the WCP as a year-round product
- Keeping sight of the Path as a natural asset.

*Practical actions to secure and sustain ease of use of the WCP*

By far the largest group of suggestions made by businesses relate to securing and sustaining ease of use of the WCP itself. This was seen by many as important if their business was to gain future benefit from the Path.

Relevant actions relate to:

- Continuing improvements to the quality and alignment of the route
- Investing in path infrastructure, including signage, to meet the highest standard
- Ensuring high levels of current and future maintenance of the Path
- Maintaining public and private facilities and services along the route
- Providing more and better information about the Path to businesses and to future users

*Activity to build connectivity between businesses and the WCP*

A significant number of businesses put forward actions which they considered would directly support the likelihood of gaining benefit from the Wales Coast Path.

Relevant actions relate to:

- Engaging with existing tourism-related businesses along the Wales Coast Path
- Strengthening physical connections between the Wales Coast Path and individual businesses, and also with whole settlements located near to the route.
- Integrating information about individual businesses with information about the Wales Coast Path.
- Improving access to the finance required to support investment to meet the needs of Path users.

*Support for stakeholders to work together to achieve the best outcomes from the WCP*

Finally, businesses identified a need for all of the stakeholders involved at all levels with the Wales Coast Path to work together to secure the greatest benefit from the investment that has been made.

Relevant actions relate to:

- Sustaining and improving promotion of the Wales Coast Path.
- Considering relationships between one specific area of the Wales Coast Path and the Path as a whole.
- Finding ways to achieve greater co-ordination between all of the different stakeholders in working together on the Wales Coast Path.

**B01257 Benefits to Business of Wales Coast Path  
Survey Questionnaire: FINAL (MAIN STAGE) with Q9 routing amendment (16.05.13)**

**Introduction text**

**ASK TO SPEAK TO OWNER / PROPRIETOR/MD/ CEO / OTHER DIRECTOR**

Good morning \ afternoon \ evening, my name is..... and I am calling from Beaufort Research, an independent market research agency based in Cardiff. We are carrying out a short survey on behalf of Natural Resources Wales gathering the views of businesses who are based near the coast in Wales. Natural Resources Wales is the new body replacing the Countryside Council for Wales, Environment Agency Wales and Forestry Commission Wales

Your participation in the survey is totally confidential. The interview will take around 10-15 minutes to complete – is it convenient to conduct the interview now?

**ASK ALL**

**Q1.** Would you like to conduct the interview in Welsh or English?

- Welsh
- English

**ASK ALL**

**Q2.** Can I ask your position within your business / organisation?

RECORD VERBATIM RESPONSE

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**ASK ALL**

**Q3.** And could you tell me the activity and nature of your business\organisation at your location? Please tell me what your MAIN activity is and also any other secondary activities?

PROBE FOR DETAIL: e.g What service do you provide? What do you make or do?

MAIN ACTIVITY

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SECONDARY ACTIVITIES

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I'd like to ask you the number of people employed at your business

**ASK ALL**

**Q4** Including yourself, how many people are permanently employed at your business at this location? At this stage please exclude any temporary or seasonal workers.

**INTERVIEWER NOTE: IF EXACT NUMBER NOT POSSIBLE, ASK FOR BEST ESTIMATE**

a. Firstly, including yourself, permanent full time employees (working 30 hours + per week)

RECORD EXACT NUMBER: \_\_\_\_\_

Don't know / refused

b. Secondly, permanent part time employees (working less than 30 hours per week)

RECORD EXACT NUMBER: \_\_\_\_\_

Don't know / refused

---

**ASK ALL**

**Q5** Now moving on to temporary or seasonal workers, across the year how many, if any, seasonal or temporary workers would be employed at your business at this location?

**INTERVIEWER NOTE: IF EXACT NUMBER NOT POSSIBLE, ASK FOR BEST ESTIMATE**

RECORD NUMBER: \_\_\_\_\_

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**ASK ALL NOT ANSWERING '0' AT Q5**

**Q6** On average, approximately how many days per year would a typical temporary or seasonal worker work?

**INTERVIEWER NOTE: IF EXACT NUMBER NOT POSSIBLE, ASK FOR BEST ESTIMATE**

RECORD NUMBER: \_\_\_\_\_ days per year

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ASK ALL

**Q7.** Could you tell me when your business\organisation started in this location?

RECORD TO NEAREST CATEGORY

- Less than a year ago
- 1 to 2 years ago
- 2.1 to 3 years ago
- 3.1 to 4 years ago
- 4.1 to 5 years ago
- 5.1 to 7 years ago
- 7.1 to 10 years ago
- 10.1 to 15 years ago
- 15.1 to 20 years ago
- 20.1 to 25 years ago
- 25.1 to 30 years ago
- 30.1 to 40 years ago
- More than 40 years ago
- DK
- Refused

ASK ALL

I'd like to talk to you now about coastal paths in Wales

**Q8.** Based on what you know about the coastal paths in Wales, which one of the following do you think best describes the coastal paths in Wales?

READ OUT:

- They are joined up into one path
- Not joined up into one path but will be in the near future
- Not joined up into one path but will be in the long term
- Not joined up into one path and probably never will be
- DK

ASK ALL

In fact, the Wales Coast Path is 870 miles long and runs continuously around the country's coastline. It includes existing stretches of improved coast path along with some new sections of path.

**Q9.** Before today, had you heard of the Wales Coast Path at all?

- Yes → Q10
- No → Q30
- Don't know

**ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9**

**Q10.** How long do you think it is since the Wales Coast Path was declared open?

RECORD NUMBER OF YEARS / MONTHS

YEARS: \_\_\_\_\_ MONTHS: \_\_\_\_\_

INTERVIEWER READ OUT STATEMENT AS NECESSARY

In fact, the Wales Coast Path opened around one year ago, on 5th May 2012.

The remaining questions I have for you concern the Wales Coast Path.

**ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9**

**Q11.** Over the past year, have you seen or heard of any publicity, advertising or information for the Wales Coast Path?

Yes

No

Don't know

**ASK IF YES AT Q11**

**Q12.** Can you tell me where or how you have seen publicity, advertising or information for the Wales Coast Path?

DO NOT PROMPT – NB IF MENTION LEAFLET / BOOKLET, NOTE IF THIS WAS SENT DIRECTLY TO THEM OR NOT

On TV

On Radio

Newspaper article

Magazine article

Leaflet / booklet

Leaflet / booklet sent directly to our business

Destination or area visitor guide

Wales Coast Path website

Any other mention of websites / internet

Signage

At an event

Other (Please record \_\_\_\_\_)

DK / Can't remember

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ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9

**Q13.** Do you mention the coastal path around Wales in any of your marketing?

READ OUT:

Yes – specifically mentions the Wales Coast Path

Yes – mentions a coastal path but does not specifically refer to the Wales Coast Path

No

DK

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ASK IF ANSWER ‘Yes – specifically mentions the Wales Coast Path’ AT Q13

**Q.14.** Which of the following best describes how prominent the Wales Coast Path is in your marketing?

READ OUT:

- Main theme
  - Important component
  - Some detail referred to
  - Passing reference
- 

ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9

**Q15a** Has the opening of the Wales Coast Path had an effect on the number of customers for your business?

Yes

No

Don't know

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ASK ALL WHO ANSWER YES AT Q15a

**Q15b** Has the number of customers.....

READ OUT:

Increased a lot

Increased a little

Decreased a little

Decreased a lot

DK

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ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9

**Q17.** Since its opening, have you introduced any new services or products for your customers to help or encourage them to use the Wales Coast Path?

OPEN ENDED – RECORD VERBATIM

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ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9

**Q18.** Specifically in response to the Wales Coast Path opening, have you changed the opening periods for your business at all?

- Yes
- No
- DK

ASK IF YES AT Q18

**Q19.** Which of the following describes how you have changed your opening periods? You may select as many or as few as apply.

READ OUT AS NECESSARY:

- Open more hours during the day.
- Open more days of the week
- Open more weeks of the year

- Open less hours during the day.
- Open less days of the week.
- Open less weeks of the year.

Any other change(Please record\_\_\_\_\_)

ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9

**Q20.** Specifically in response to the Wales Coast Path opening, has any capital investment been made in your business?

Yes  
No  
DK

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ASK IF YES AT Q20

**Q21.** And approximately, what was the total cost of this investment?

NB: INTERVIEWER – ENCOURAGE BEST ESTIMATE

RECORD £: \_\_\_\_\_

DK

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ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9 **AND** IF TOTAL STAFF ACROSS Q5/Q6 IS GREATER THAN ONE

**Q22.** And again specifically in response to the Wales Coast Path opening, have you changed the amount of staff at your business?

Yes  
No  
DK

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ASK IF 'CHANGED STAFF' AT Q22

**Q23.** How has the amount of staff at your business changed?

RECORD NUMBER BELOW:

INCREASED BY: \_\_\_\_\_ OR DECREASED BY: \_\_\_\_\_

DK

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ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9

**Q24a.** And again specifically in response to the Wales Coast Path opening, have you changed the hours that you or your staff work?

Yes  
No  
DK

ASK IF 'CHANGED HOURS' AT Q24a

**Q24b.** On average, how have the hours of staff changed per week per typical staff member?

RECORD NUMBER BELOW:

INCREASED BY: \_\_\_\_\_ per week      OR DECREASED BY: \_\_\_\_\_ per week

DK

ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9

**Q25.** In response to the Wales Coast Path opening have you or your staff undertaken any additional training?

Yes

No

DK

ASK IF TRAINING UNDERTAKEN AT Q25

**Q26** What has been the nature of that training?

PROBE: What did it involve?

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ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9

**Q27** Do you consider that in future there will be any change in the importance of the Wales Coast Path to the success of your business?

READ OUT:

Yes – will become more important

Yes – will become less important

No, no change

DK

ASK IF ANSWER 'YES – MORE IMPORTANT' OR 'YES – LESS IMPORTANT' AT Q27

**Q28.** Why do you think this is?

PROMPT: What will drive the change? What will be different in the future?

OPEN ENDED – RECORD VERBATIM

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ASK THOSE WHO ARE AWARE OF WALES COAST PATH AT Q9

**Q29.** Is there anything that you would like to see happen in the future which would make it more likely that your business would benefit from the opening of the Wales Coast Path?

OPEN ENDED – RECORD VERBATIM

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ASK ALL

**Q30.** Are you aware of any tourism business that may have opened IN THE LAST 18 MONTHS, or be planning to open, on or near this stretch of the Wales Coast Path?

Yes → RECORD AS MUCH DETAIL AS POSSIBLE BELOW  
No

NAME:

TYPE OF BUSINESS:

ADDRESS:

ASK ALL

**Q31.** Are you aware of any tourism business that may have expanded IN THE LAST 18 MONTHS, or be planning to expand, on or near this stretch of the Wales Coast Path?

Yes → RECORD AS MUCH DETAIL AS POSSIBLE BELOW  
No

NAME:

TYPE OF BUSINESS:

ADDRESS:

Just to ensure we speak to a good cross section of businesses can I ask you...

[ASK ALL](#)

**Q32.** What was the approximate value of turnover (or total sales revenue) in your last financial year? Please answer in relation to this location only.

READ OUT AS NECESSARY

Under £50k

£50k to £99k

£100k to £200k

£201k to £300k

£301k to £500k

£501k to £750k

£751k to £1 million

£1.1 million to £5 million

£5.1 million to £10 million

£10.1 million to £50 million

£50.1 million to £100 million

Over £100 million

DK

Refused

[ASK ALL](#)

**Q33.** Natural Resources Wales, or a research company employed by them, may invite you to take part in further research. This could be face-to-face, by telephone or as part of a focus group. This would involve Beaufort Research passing your contact details to Natural Resources Wales. If you are re-contacted, there will be no obligation to take part. Would you be willing to be re-contacted?

Yes

No

[ASK IF 'YES' AT Q33](#)

**Q34.** They may also wish to select organisations to take part in future research based on some of the answers that have been given to today's survey. Therefore would you also be willing for Beaufort to pass your survey responses alongside your contact details to Natural Resources Wales?

Yes

No

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**Closing text**

READ OUT

Thank you for your time.

Just to confirm that my name is calling from Beaufort Research and that this survey has been conducted in accordance with the Market Research Society Code of Conduct.

If you'd like to check our credentials, you can telephone the MRS via the freephone number 0500 39 69 99.

Thanks again and goodbye.

RECORD ANY OTHER NOTES

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**Note on sampling & weighting**

A total of 5407 businesses within 2km of the Wales Coast Path was the identified universe of this research. The sample size of 1,600 interviews represented a challenging response rate of around 1 in 3.

Furthermore, to maintain the representativeness of the sample of interviews, monitoring quotas were set on two key variables:

- Area: whether the business was located in a Convergence or non-Convergence area
- Business Sector: Accommodation, Service / Hospitality, Retail, Attraction / Activity

Given the requirement to achieve a large number of interviews overall from a relatively small universe, the ability to strictly enforce these quotas would be limited given that compliance rates may vary between different types of business.

Target sample sizes are set out in the table below. The targets for business sector are based on the proportions found in the universe, whereas targets for Convergence / Non Convergence area (at the request of NRW) were in proportion to length of Wales Coast Path found in each of the two areas. Adjacent to the targets are the achieved sample sizes.

	TARGET		ACHIEVED	
	sample size	%	sample size	%
<b>Area</b>				
Convergence	1,390	87%	1,390	87%
Non Convergence	210	13%	210	13%
<b>Sector</b>				
Accommodation	570	36%	728	46%
Service / Hospitality	635	40%	501	31%
Retail	335	21%	310	19%
Attraction / Activity	60	4%	61	4%
TOTAL	1,600	100%	1,600	100%

Achieving the overall target of 1,600 interviews involved completely exhausting the provided universe – i.e. either achieving an interview, a refusal, establishing other reasons for non-interview (e.g, invalid telephone number) or no contact with each of the 5,407 businesses. In the case of the latter, *no contact*, at least 10 attempts were made to get in touch with these businesses.

The profile of the achieved sample exactly matched the targets for Convergence and non-Convergence areas but for business sector, compliance with the survey was higher among those in the accommodation sector and lower in the service / hospitality sector. To correct for this, data was RIM<sup>12</sup> weighted by business sector and Convergence / non-Convergence area to ensure that our final sample of interviews closely matched the universe profile. The weighted and un-weighted sample profiles are shown below:

	UNWEIGHTED		WEIGHTED	
	sample size	%	sample size	%

<sup>12</sup> RIM: Random Iterative Method - method of weighting that puts selected non-interlocking and grouped interlocking variables in isolation through an iterative sequence of weighting adjustments. The sequence adjusts for each rim in turn and then repeats itself as many times as is required in order to obtain a convergence, in which the sum of the weighted rims matches the target population estimates, or is as close as it is possible to achieve.

<b>Area</b>				
Convergence	1,390	87%	1,392	87%
Non Convergence	210	13%	208	13%
<b>Sector</b>				
Accommodation	728	46%	557	35%
Service / Hospitality	501	31%	646	40%
Retail	310	19%	336	21%
Attraction / Activity	61	4%	61	4%
<b>TOTAL</b>	<b>1,600</b>	<b>100%</b>	<b>1,600</b>	<b>100%</b>

The statistical confidence associated with our overall sample sizes is set out in the next table. Given that our sample is a relatively large proportion of the overall universe (30%) a finite population correction factor (fpc) has been applied to these confidence intervals:

**Statistical reliability (at 95% confidence level)**

**Ranges at the 95% confidence level (excluding survey design factors)**

Survey Result	50%	70% / 30%	90% / 10%
<b>Sample size:</b>			
1600 (total sample)	+/-2.1	+/-1.9	+/-1.2
1390 (Convergence area)	+/-2.2	+/-2.0	+/-1.3
210 (Non Convergence area)	+/-6.2	+/-5.7	+/-3.7

*How to read the above table:* For example, thinking about an overall sample size of 1,600 respondents, if 50% said they were aware of the Wales Coast Path, we could say with 95% confidence that the true proportion who were aware of the path (among all businesses within 2km of the path) ) lies between 47.9% and 52.1% (i.e. +/-2.6%)