

Wales Coast Path Visitor Survey 2019-2021

Report No: B01917

Author Name: Chris Timmins/Owen Knight, Beaufort Research

Evidence at Natural Resources Wales

Natural Resources Wales is an evidence-based organisation. We seek to ensure that our strategy, decisions, operations and advice to Welsh Government and others are underpinned by sound and quality-assured evidence. We recognise that it is critically important to have a good understanding of our changing environment.

We will realise this vision by:

- Maintaining and developing the technical specialist skills of our staff;
- Securing our data and information;
- Having a well resourced proactive programme of evidence work;
- Continuing to review and add to our evidence to ensure it is fit for the challenges facing us; and
- Communicating our evidence in an open and transparent way.

This Evidence Report series serves as a record of work carried out or commissioned by Natural Resources Wales. It also helps us to share and promote use of our evidence by others and develop future collaborations. However, the views and recommendations presented in this report are not necessarily those of NRW and should, therefore, not be attributed to NRW.

Publication date: December 2021

Contractor: Beaufort Research, 2 Museum Place, Cardiff, CF10 3BG

Contract Manager: Quentin Grimley

Title: **Wales Coast Path Survey 2019-2021**

Author(s): Chris Timmins; Owen Knight

Technical Editor: Quentin Grimley

Quality assurance: Tier 3. Dave Maccallum, Eve Nicholson, Rachel Parry, Juliet Michael and Sioned Humphreys.

Peer Reviewer(s): David Bleines Approved By: Jont Bulbeck

Contents

Evidence at Natural Resources Wales.....	1
Contents	2
Summary	3
Key findings.....	3
Wales coast path visitor profile	3
Using the Wales Coast Path.....	5
Introduction	8
Background	8
Natural Resources Wales	8
The Wales Coast Path.....	8
Aims and objectives	8
Methodology.....	9
The impact of Covid-19	11
Analysis.....	11
Main findings.....	12
Profiling Wales Coast Path visitors	12
Gender profile.....	12
Age profile	13
Socio-economic profile	14
Group composition.....	15
Area of residence.....	17
Working status.....	21
Limiting health problem/disability	22
Ethnicity	23
Using the Wales Coast Path	24
Travelling to the coast path.....	24
Modes of transport used on Coast Path	26
Type of trip.....	27
Accommodation used by staying visitors	31
Regularity of using the Wales Coast Path	34
Awareness of path name	35
Reasons for using the Wales Coast Path	37
Distance and time spent travelling along the Wales Coast Path.....	39

Spend – whilst on the Wales Coast Path and on accommodation.....	42
Satisfaction with aspects of the Wales Coast Path.....	44
Information sources	46
The impact of Covid-19.....	48
Appendix – Survey Questionnaire	51

Summary

This report provides analysis of the 2019-21 Wales Coast Path Visitor Survey – the third such survey since the first iteration conducted between 2011 and 2013, followed by a second survey conducted in 2015.

A total of 1,519 interviews were completed between July 2019 and June 2021 (with a hiatus from mid-March 2020 to April 2021 because of the Covid-19 pandemic, in the interest of public and interviewer safety).

The report examines Wales Coast Path user profiles and characteristics, spend, motivations, experiences, and information sources, making comparisons with previous survey findings where possible.

Key findings

Wales coast path visitor profile

Gender profile

The gender distribution of Wales Coast Path users was almost even (48% male cf. 52% female) - nearly exactly in line with the adult population of the UK (49% male cf. 51% female). Although this profile was similar to that of the 2015 survey (51% male / 49% female), it represents a shift to a more balanced gender profile compared to 2011-2012, when the Wales Coast Path users were slightly more likely to be male (56% male cf. 44% female).

Age profile

The average age of those using the Wales Coast Path (excluding children under 16) was 53 years; this remains unchanged from the 2011-2013 and 2015 research but is older than the UK mean age of 47 years (excluding children under 16). Moreover, the distribution of respondents by age categories varies somewhat from the UK profile. While 30% of the UK population (age 16 and over) are 16–34 years of age, in 2019-21, only 17% of Coast Path users fell into this age group (albeit a slight increase from 12% 2015 and 13% in 2011-2013). And at the other end of the age scale, around two fifths of the UK population are aged over 55 years (38%), while over half of Coast Path users fell into this age group (52%).

Socio-economic profile

As was the case in previous studies, there was a fairly pronounced skew towards an ABC1 demographic amongst respondents, with a higher representation of people from the AB categories (31%) and C1 category (40%) compared to the UK profile (22% AB; 31% C1).

¹ *AB (higher administrative or professional occupations)*

C1 (junior managers, owners of small establishments and other non-manual positions)

C2 (skilled manual workers with a responsibility for other people)

DE (semi-skilled and unskilled manual workers, casual workers and those dependent on state benefits)

Group composition

Most (72%) Wales Coast Path users were with at least one other person while on the Coast Path, meaning almost three in ten (28%) were using the Path alone. Users were most likely to be with a spouse/partner (38%), while 16% were in a family group containing children, slightly more than one in ten (12%) were with friends and slightly fewer than one in ten (9%) were in a family group that did not contain children. The average group consisted of 2.3 people, including adults (2.0) and children (0.3).

Area of residence

Three fifths (62%) of those using the Coast Path were Welsh residents, while a third (35%) were from England and 2% were from outside of the UK. The proportion of visitors from England (35%) represents a slight increase since 2015 when fewer (32%) Coast Path users were visiting from England. The proportion of visitors from England was greater in the spring and summer months, when visitors from England made up approaching half (45%) of all visitors, in comparison with around one in twenty in autumn and winter months.

Limiting health problem / disability

A total of 15% of Coast Path users reported they (or another group member) had a limiting illness/disability (6% limiting 'a lot' and 9% 'a little'). This represents a slight increase from 12% in the 2015 and 2011-13 surveys.

Ethnicity

As was the case in previous studies, the ethnic profile of respondents was primarily White (98%), while 2% belonged to minority ethnic groups, compared with 13% of the UK population, according to the 2011 Census.

Using the Wales Coast Path

Travelling to the Coast Path

Most Coast Path users had travelled relatively short distances to reach the Coast Path from where they were staying the night before, with three fifths (60%) travelling five miles or less.

Cars / vans were the main mode of transport to reach the Coast Path - used by two thirds (67%). However, more than a quarter (27%) walked, while other forms of transport were used by fewer than one in ten (7%).

Modes of transport used on the Coast Path

The vast majority of respondents were walking along the Wales Coast Path when interviewed (94% in 2019-21). Fewer than one in twenty cycled (4%) and only a small proportion (2%) used other forms of transport (e.g. using an assisted/disability vehicle, motorised vehicle or horse riding).

Type of trip

The overall proportion of respondents who were staying visitors (those staying overnight or as part of a longer holiday) has remained relatively consistent across the survey periods, with approximately two fifths (42%) of Coast Path users being staying visitors in 2019-21, compared with 39% in 2015 and 2011-13 surveys.

The slight increase in the proportion of overnight stays in the latest survey was largely driven by a high proportion of Coast Path users interviewed in May and June 2021 (when UK Covid restrictions had eased, but international travel remained largely restricted), being staying visitors.

The average number of nights spent in Wales by staying visitors was 6.4.

The vast majority (79%) of staying visitors intended to use the Wales Coast path on more than one day. More than half (54%) - intended to visit different sections of the path on different days of their stay, with fewer - around one in five (18%) - intending to repeatedly use the same section of path several times during their stay. Of the remainder, 4% intended to journey along one continuous section of the path over several days, 3% were intending to walk the whole Wales Coast Path over several separate trips and 1% were doing so in one trip.

Accommodation used by staying visitors

Staying visitors were most likely to be staying in camping or caravan-based accommodation - Two fifths (43%) were in this type of accommodation, which comprised those in touring caravans / campervans / motorhomes (20%), those in their own static caravans (10%), camping (8%) and those in rented static caravans (5%).

Regularity of using the Wales Coast Path

As was the case in previous years, the vast majority of respondents in 2019-21 were repeat visitors to the Wales Coast Path (91% cf. 93% in 2015 and 91% in 2011-13). First-time visitors therefore accounted for almost one in ten visitors in 2019-21 (9%). The proportion of first-time visitors was higher in May and June 2021 (when UK Covid restrictions had eased, but international travel restrictions were in place).

Respondents tended to be fairly regular visitors to the Wales Coast Path, with three fifths (63%) using the Path once a month or more often.

Awareness of path name

The survey also asked respondents if they knew the name of the 'long distance path' they were on. Without prompting, a fifth (22%) referred to the path as the 'Wales Coast Path' (or very similar e.g. Welsh Coast Path / Coast Path of Wales etc.). A further one in ten (13%) generically referred to it as a 'coast path' or 'coastal path', while a further quarter (27%) used another (predominantly regional / local) name for the path. Two fifths (40%) did not know the name for the path they were using.

Reasons for using the Wales Coast Path

The survey established whether using the path was the main purpose of their day out, one of the reasons, or if they had not specifically planned to use the Coast Path. The Coast Path was the main purpose of their day out for most users (three fifths, 60%), and one of the reasons for their day out for a further quarter (24%). Just one in seven (16%) Coast Path users had not specifically planned to walk / ride along the coast.

When asked about motivations for using the Wales Coast Path, scenery / views was the reason most cited (by two thirds, 66%). For more than half, health / exercise (56%) and for fresh air or to enjoy pleasant weather (54%) were the reasons for using the Coast Path, while for more than two fifths (45%), the ability to relax and unwind while on the Coast Path was a motivation.

Distance and time spent travelling along the Wales Coast Path

Most Coast Path users, almost three fifths (58%), had travelled relatively short distances along the Path (up to two miles - between their start point on the Path and the furthest point from that start point on the Path). A further three in ten (31%) had travelled along 2 to 5 miles of the Path. Just one in ten (11%) travelled along more than 5 miles of the Coast Path.

The average amount of time spent on the Coast Path was almost two hours (1 hour 56 minutes).

Spend - whilst on the Wales Coast Path and on accommodation

Average total group spend (excluding accommodation) within 10 miles of the Coast Path was £19 (or £9 per person). Staying visitors expected to spend considerably more than day visitors – an average of £33 compared with £10 for day visitors.

Of the average of £19 expected to be spent within 10 miles of the Coast Path, half of this (£10) was expected to be spent whilst on the path itself (including start and end points).

Average accommodation spend per night (among those staying in paid accommodation) was £77 (or £37 per person).

Satisfaction with aspects of the Wales Coast Path

Encouragingly, almost all (97%), agreed (either strongly or slightly) that they had enjoyed using the path on the day of their visit, with the vast majority of these (almost nine in ten, 88%) agreeing strongly that they had enjoyed using the path.

Furthermore, the vast majority (almost nine in ten, 88%) of Wales Coast Path users agreed that using the Path had contributed to their appreciation of Wales and its culture.

The Path furniture and surface were also generally likely to be considered in a positive light – Eight in ten (81%) agreed that the furniture was in a good state of repair and the same proportion agreed the Path surface was of a good standard, free from obstacles and not overgrown. Seven in ten (71%) of Coast Path users agreed that the signage / waymarking made it clear and easy to navigate the Path.

Although most Coast Path users (60%) agreed that plenty of information was available about the Path, this was the aspect users were least likely to be in strong agreement with (36%).

Information sources

When asked how they had found out about the Path they were using, most users said they had either always known about it (62%) or found out through word of mouth (16%). More than one in ten (13%) had just happened to come across the Path.

The impact of Covid-19

Following a break in survey interviewing due to the Covid-19 pandemic, two additional survey questions were included when the survey re-commenced from May to June 2021. The questions aimed to establish whether users were likely to have been visiting/using the Path were it not for the Covid-19 pandemic, and the extent to which they felt safe using the Path at that time.

Although more than three quarters (77%) said they 'definitely' would have visited anyway, 15% weren't as certain, saying they 'probably' would have done so. One in twenty (6%) said they either 'probably' or 'definitely' would not have been using the Coast Path on that day had it not been for the Covid-19 pandemic.

In terms of safety in relation to the risk of Covid, users appeared comfortable on the Wales Coast Path overall. More than four fifths (85%) said they felt 'very' safe on the Path. Of the remainder 14% felt 'fairly' safe, and just 1% said they felt either fairly or very unsafe.

Introduction

Background

Natural Resources Wales

Natural Resources Wales (NRW) is the largest Welsh Government Sponsored Body - employing 1,900 staff across Wales with a budget of £180 million. It was formed in April 2013, largely taking over the functions of the Countryside Council for Wales, Forestry Commission Wales and the Environment Agency in Wales, as well as certain Welsh Government functions.

Its purpose is to pursue sustainable management of natural resources. This means looking after air, land, water, wildlife, plants and soil to improve Wales' well-being, and provide a better future for everyone.

As an evidence-based organisation, it seeks to ensure that strategy, decisions, operations and advice to the Welsh Government and others are underpinned by sound and quality-assured evidence. NRW recognise that it is critically important to have a good understanding of our changing environment.

Further information: www.naturalresourceswales.gov.uk

The Wales Coast Path

The high-profile Wales Coast Path, which opened in 2012 after a five-year development programme, runs for 870 miles around the coast of Wales from the outskirts of Chester in the north to Chepstow in the south. The route is marketed for use by tourists and local residents with the key aims of improving public health and benefitting the local economy.

NRW co-ordinates, monitors and markets the Path at a national level and distributes grant-aid to the 16 coastal local authorities that manage the path on the ground.

Further information: www.walescoastpath.gov.uk

Aims and objectives

NRW previously contracted two Visitor Surveys of Wales Coast Path users – the first conducted between 2011 and 2013, followed by another survey conducted between December 2014 and January 2016 (referred to as 2015 within this report). In 2019, Beaufort Research was appointed to undertake the latest wave of Wales Coast Path visitor research. The following report outlines the main findings of this most recent survey undertaken between 2019 and 2021.

The purpose of the Wales Coast Path Visitor Survey (2019-21) was to gather, analyse and report on information from 1,500 respondents relating to the following categories:

- a) Individual respondent profiles
- b) Group profiles
- c) Multi day visit characteristics
- d) Visit characteristics for the day in question
- e) Visitor spend
- f) Motivation
- g) Experience
- h) Information provision

The information is intended to provide an understanding of people using the route, including their opinions and needs. It is also intended to inform future management actions - including path development, marketing and information provision.

Methodology

The research universe for the visitor survey was defined as those aged 16+ who were using the Wales Coast Path at any point along its 870 miles, either on foot, cycling, horse-riding or using small, motorised vehicles (e.g. disability scooters).

A total of 1,519 interviews were completed during the fieldwork period.

The sample was also designed to mirror the diversity of the Path in terms of:

- Rural / urban locations.
- Local authorities.
- Busy / quiet periods (e.g. weekends / weekdays, in season / out of season).

A total of 58 interview sites across the Coast Path were used for the research and these were chosen as a result of recommendations from NRW, by the individual local authorities and by Beaufort Research.

To ensure a representative sample of Coast Path visitors was interviewed, and avoid any bias, the following steps were taken:

- Criteria for eligibility for interview were imposed, as follows:
 - respondents must have been adults, aged 16 years or over.
 - they must have been using the Wales Coast Path at the time of interview.
 - they must not have been employed by any organisations associated with the Wales Coast Path.
- The 'next person' rule was employed, that is the interviewer selected respondents on the basis of the next person to pass on completion of the previous interview.
- Also, no more than one person per group was interviewed and – in the event of groups – the 'next birthday' rule applied: that is the person with the next birthday to come in the group was interviewed. This overcame any potential bias in the sample and helped ensure it was as representative as possible.
- No quotas were imposed, to allow the profile of Coast Path visitors to fall out naturally.

Interviewers were given a comprehensive briefing on the Coast Path and a detailed map to reach their exact point of interview on the Path itself.

The survey questionnaire was administered in either English or Welsh (which was the choice of the respondent); 17% of the survey sample spoke Welsh and 3% chose to take part in a Welsh language interview.

The sites used in the research were as follows:

<p>Flintshire</p> <ul style="list-style-type: none"> • Talacre Beach • Greenfield Dock • Flint Foreshore <p>Denbighshire</p> <ul style="list-style-type: none"> • Rhyl (nr TIC) • Prestatyn <p>Conwy</p> <ul style="list-style-type: none"> • Kinmel Bay • Little Orme • West Shore Llandudno • Penmaenmawr • Jubilee Path, Penmaenmawr • Morfa Madryn <p>Anglesey</p> <ul style="list-style-type: none"> • South Stack • Moelfre • Beaumaris • Amlwch • Swtan <p>Gwynedd</p> <ul style="list-style-type: none"> • Plas Glyn y Weddw • Porth Oer • Tal y Bont • Pont Coronation • Treborth Botanical Gardens 	<p>Ceredigion</p> <ul style="list-style-type: none"> • Aberporth • Constitution Hill • Penbryn • Bird Rock nr New Quay • Llanon • Cardigan • Cwmttydu <p>Pembrokeshire</p> <ul style="list-style-type: none"> • Manorbier • Solva • Wiseman's Bridge • Dinas • Newgale <p>Carmarthenshire</p> <ul style="list-style-type: none"> • Pendine Village • Laugharne Town • Kidwelly • Pembrey Mill Path <p>Swansea</p> <ul style="list-style-type: none"> • Langland Bay • Caswell Bay • Rhossili • Hills Burrows • Southgate 	<p>Neath Port Talbot</p> <ul style="list-style-type: none"> • Aberavon sea front • The Quays, Baglan <p>Bridgend</p> <ul style="list-style-type: none"> • Locks Common, Porthcawl • Trecco Bay <p>Vale of Glamorgan</p> <ul style="list-style-type: none"> • Lavernock Point • Porthkerry Country Park • Cwm Colhugh, Llantwit Major • Dunraven, Southerndown • Ogmore <p>Cardiff</p> <ul style="list-style-type: none"> • Cardiff Bay Norweigan Church • Parc Tredelerch <p>Newport</p> <ul style="list-style-type: none"> • Goldcliffe Point • St Brides lighthouse • Newport Wetlands <p>Monmouth</p> <ul style="list-style-type: none"> • Black Rock • Chepstow
--	---	---

Interviewing was undertaken across urban and rural locations, and comparisons are made between those interviewed at each location type within this report. Urban interviewing locations are highlighted in blue text above, while those defined as rural are highlighted in green.

¹The Rural-Urban Classification is a Government Statistical Service product developed by the Office for National Statistics; the Department for Environment, Food and Rural Affairs;

the Department for Communities and Local Government; and the Welsh Assembly Government, in collaboration with Sheffield and Nottingham Universities. The split in this survey is taken from the 2011 map of Middle Layer Super Output Areas. [Rural Urban Classification \(2011\) map of the MSOAs in Wales | Open Geography Portal](#) (statistics.gov.uk)

The impact of Covid-19

The survey was originally intended to capture the views of Wales Coast Path users over a 12-month period, from July 2019 to June 2020. As a result of the Covid-19 pandemic, in the interest of public and interviewer safety and in accordance with Government and Market Research Society (MRS) guidelines, face to face survey interviewing was suspended prior to the completion of the survey fieldwork in March 2020.

In May 2021, as Covid-19 restrictions eased and MRS guidance allowed, it was possible to re-commence survey interviewing (in adapted form) to complete the remaining survey fieldwork (to achieve a final total sample size of 1,500 interviews), between mid-May and the end of June 2021. At this time, UK travel restrictions had eased, but international travel remained largely restricted. Possibly driven by an increase in UK domestic travel as a result, the survey data from these months reveals a higher proportion of first-time visitors and overnight stays than during the equivalent months of the 2015 survey (see sections 3.2.3 and 3.2.5).

The final survey sample includes coverage of Coast Path users from 11 of 12 calendar months (albeit from different calendar years).

The most recent survey is referred to as the 2019-2021 survey within this report.

Analysis

The data was analysed by key subgroups, including social demographic groupings. These are based on the occupation of the Head of Household (i.e. the chief income earner within the household). The following definition outlines the groupings used and the types of occupation included in each:

- AB (Professionals, senior managers, middle management of large organisation, top management of small businesses).
- C1 (Junior management, owners of small establishments and all other non-manual positions).
- C2 (Skilled manual workers, manual workers with responsibility for other people).
- DE (Semi-skilled and unskilled manual workers, apprentices and trainees to skilled workers, those dependent on state benefits, casual workers and those without regular income).

To minimise contact between survey participants and interviewers, the survey moved to a self-completion approach for data collection, where interviewers provided Coast Path users with a questionnaire to complete themselves (on a tablet). A risk assessment was also undertaken, in accordance with MRS guidelines, and interviewers were supplied with appropriate PPE (masks, sanitiser, sanitising wipes etc.), and received a Covid safety briefing.

The data has also been analysed according to region, designed to be cohesive in terms of Path characteristics, as follows;

- North Coast (Flintshire, Denbighshire, Conwy)
- Anglesey
- Gwynedd
- Ceredigion
- Pembrokeshire
- Carmarthen Bay & Gower (Carmarthenshire and Swansea)
- South Coast (Neath Port Talbot, Bridgend, Vale of Glamorgan, Cardiff, Newport and Monmouthshire)

Main findings

Profiling Wales Coast Path visitors

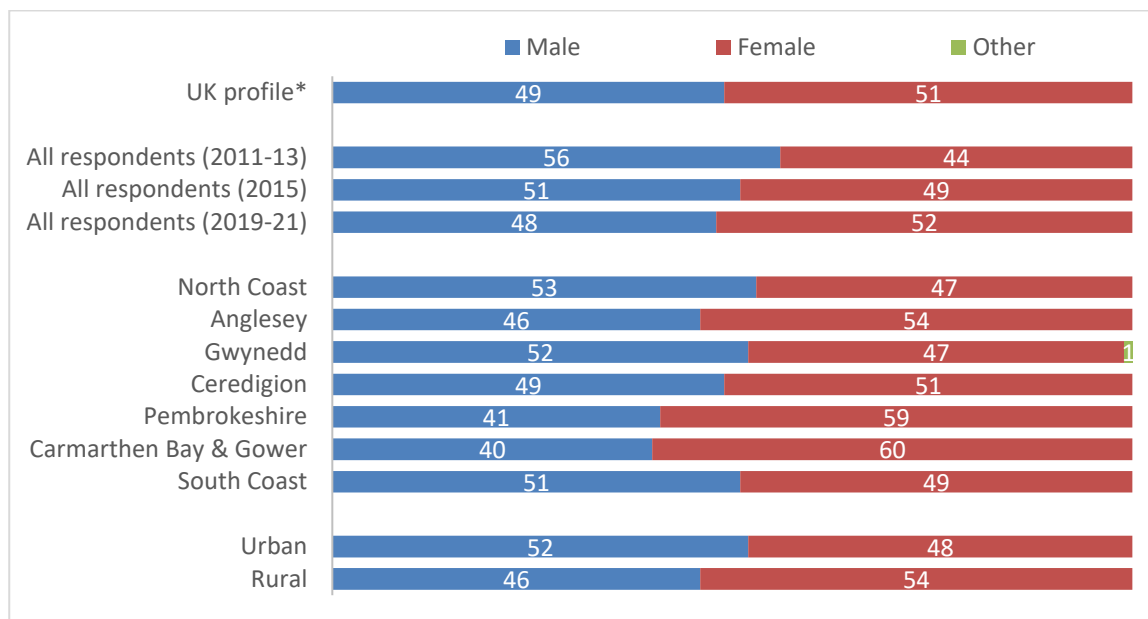
The first findings section of this report examines the profile of those using the Wales Coast Path - by age, gender, social grade, group composition, area of residence and mobility.

Gender profile

Overall, the gender distribution of respondents in the most recent wave of the research was almost even (48% male cf. 52% female) - nearly exactly in line with the adult population of the UK (49% male cf. 51% female). Although this profile was similar to that of the 2015 survey (51% male / 49% female), this represents a shift to a more balanced gender profile compared to 2011-2012, when the Wales Coast Path users were slightly more likely to be male (56% male cf. 44% female).

There were, however, some gender profile differences across the different geographic areas of the Path. Along the North Coast, Gwynedd and South Coast, there was a general propensity for a slightly higher proportion of male respondents compared to female, while in Pembrokeshire, Carmarthen Bay and Gower, Coast Path users were somewhat more likely to be female (see figure 1). There was also a slight skew toward more females than males on rural areas of the Path (54% female cf. 46% male).

Figure 1 – gender of Wales Coast path users – by region and rurality (%)



Base (excluding 'prefer not to say' - 7 respondents): All 2011-13 (1,566), all 2015 (1,483), all 2019-21 (1,512), North Coast (305), Anglesey (208), Gwynedd (167), Ceredigion (141), Pembrokeshire (156), Carmarthen Bay & Gower (206), South Coast (329), urban (566), rural (946).

*Source: UK Census data Table QS104UK

Further analysis of the data by gender reveals that cyclists along the Path were much more likely to be male (74%) compared to female (26%), whereas the profile of walkers was nearer an even split (47% male / 53% female). Moreover, those respondents aged 65+ years were predominantly male (60%); respondents aged younger than this generally showed a more even gender distribution, with the exception of 35 to 44 year olds who were predominantly (63%) female.

In terms of group composition, those using the path alone were more likely to be male (61%), while those with family and/or friends were more likely to be female (63%) than male (37%).

Age profile

In the most recent wave of the research, the mean average age of respondents (excluding children under 16) using the Wales Coast Path was 53 years; this remains unchanged from the 2011-2013 and 2015 research, but is older than the UK mean age of 47 years (excluding children under 16). Moreover, the distribution of respondents by age categories varies somewhat from the UK profile. See figure 2.

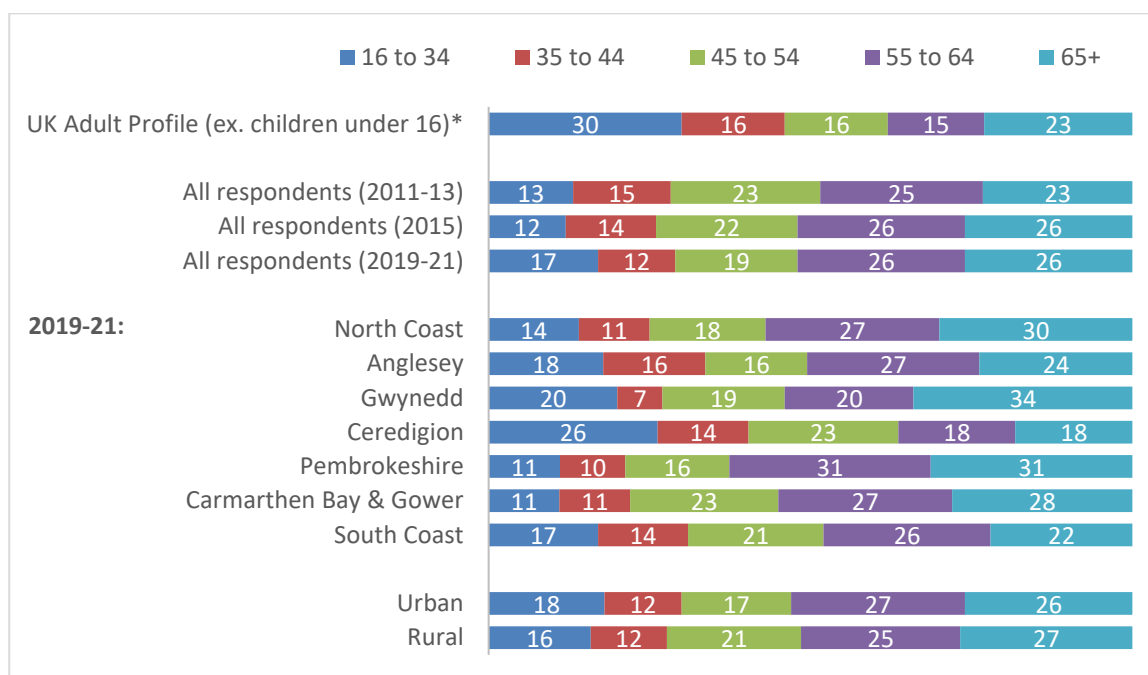
While 30% of the UK population (age 16 and over) are 16–34 years of age, in 2019-21, only 17% of Coast Path users fell into this age group (a slight increase from 12% 2015 and 13% in 2011-2013). And at the other end of the age scale, around two fifths of the UK population are aged over 55 years (38%), while over half of Coast Path users fell into this age group (52% in 2019-21 and 2015; 48% 2011-2013).

There were variations in the age of respondents according to the geographic location of the Path. For example, in Ceredigion, a higher proportion of respondents were aged 16–34 years (26%), while in Pembrokeshire and Carmarthen Bay & Gower it dropped to just 11%. Moreover, while over 55s accounted for 36% of respondents in Ceredigion, as many as 62% of those on the Pembrokeshire section of the Coast Path were in this age group - see Figure 2.

No significant differences in the age profile of users were apparent between rural and urban parts of the Coast Path.

¹ Welsh Government data shows men were significantly more likely to cycle as a means of transport generally, and to do so more frequently than women. [Walking and cycling in Wales: active travel, 2018-19 \(gov.wales\)](https://gov.wales/walking-and-cycling-in-wales-active-travel-2018-19)

Figure 2 – Age of Wales Coast Path users (aged 16 and over) – by region and rurality (%)



Number of respondents (excluding 'prefer not to say' – 30 respondents, 2%): All 2011-13 (1,525), all 2015 (1,463), all 2019-21 (1,489), North Coast (300), Anglesey (204), Gwynedd (164), Ceredigion (139), Pembrokeshire (153), Carmarthen Bay & Gower (206), South Coast (323), urban (558), rural (931).

*Source: Mid-year population estimates 2020, Office for National Statistics

Socio-economic profile

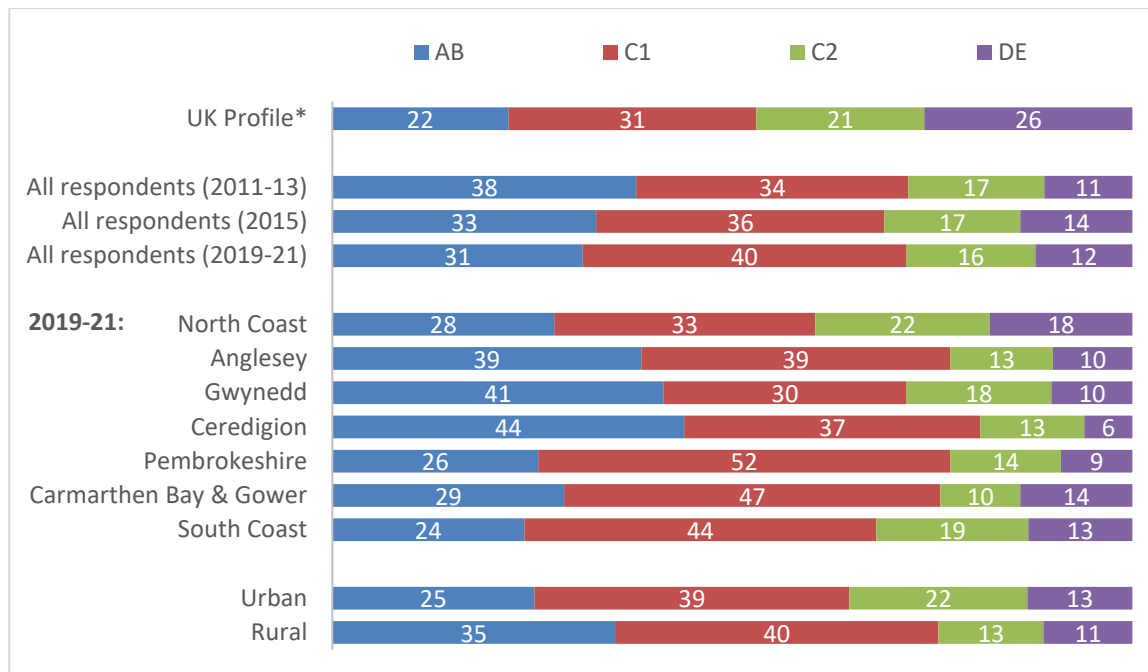
As was the case in previous studies undertaken in 2015 and 2011-13, there was a fairly pronounced skew towards an ABC1 demographic amongst respondents, with a higher representation of people from the AB categories (31%) and C1 category (40%) compared to the UK profile (22% AB; 31% C1).

The socio-economic profile of Coast Path users varied according to location. Although in all locations there was a predominance of ABC1 respondents, sections of the Coast Path where representation of the C2DE socio-economic groups was highest were along the

North and South Coast (40% and 33% of Coast Path users along these sections were from social grades C2DE) – see figure 3. Reflecting this, there was a higher propensity for respondents classed as C2DE on sections of the Coast Path in more urban areas (35%) compared to rural sections of the Coast Path (24%).

Those on sections of the Coast Path in Anglesey, Gwynedd and Ceredigion, were most likely be from the highest social grade categories (AB) – Around two in five respondents on these sections of the Coast Path were categorised as such.

Figure 3 – Socio economic profile of Wales Coast Path users – by region and rurality (%)



Number of respondents (excluding 'prefer not to say' – 42 respondents, 3%): All 2011-13 (1,561), all 2015 (1,471), all 2019-21 (1,477), North Coast (297), Anglesey (205), Gwynedd (165), Ceredigion (138), Pembrokeshire (152), Carmarthen Bay & Gower (201), South Coast (319), urban (550), rural (927).

*Source: Census 2011 data table QS611UK

Group composition

Who users were with on the Coast Path

Most (72%) Wales Coast Path users were with at least one other person while on the Coast Path, meaning almost three in ten (28%) were using the Path alone. Almost two fifths (38%) of users were with a spouse/partner, 16% were in a family group containing children, slightly more than one in ten (12%) were with friends and slightly fewer than one in ten (9%) were in a family group that did not contain children.

Those using the Coast Path in urban areas, and reflecting this, those on the 'South Coast' and 'North Coast' sections of the Coast Path were most likely to be alone – 37% of those in urban areas and 36% and 34% respectively of those on the South and North Coast sections of the path were alone.

Coast Path users in Anglesey were more likely than the overall average to be in family groups (either with or without children). See figure 4.

Figure 4 – Group composition – by region and rurality (%)

	All	North Coast	Anglesey	Gwynedd	Ceredigion	Pembrokeshire	Carmarthen Bay & Gower	South Coast	Urban	Rural
With spouse / partner	38	34	45	42	41	43	39	33	32	42
Alone	28	34	15	25	20	22	32	36	37	22
With family – with children	16	17	23	20	19	17	11	11	13	18
With friends	12	10	8	11	15	12	14	14	12	12
With family – without children	9	8	14	13	10	9	6	8	8	10
With organised group	0	-	-	-	-	-	0	1	0	0
<i>Number of respondents:</i>	1519	306	208	168	143	156	207	331	570	949

Totals can exceed 100% as more than one response possible.

Other differences in group composition included:

- Those using the Coast Path during the autumn and winter months being more likely to be using the Coast Path alone (35% doing so alone in the autumn and 38% in the winter), compared with 20% and 25% of users of the Coast Path in the spring and summer.
- Frequent users of the Wales Coast Path were by far the most likely to be using the path alone - 57% of those using the Coast Path daily, and 35% of those using the path on a weekly basis were doing so alone, compared with just 14% of those who were less frequent users of the Wales Coast Path.
- Men were also more likely to be lone users of the path (35%) than women (21%), as were older people (36% of those aged 65+ were alone).
- Staying visitors were less likely to be alone (14%), than those on a day visit (38%).

Group size

Turning to group size, the survey established how many adults and children were in Coast Path users' entire group that day. The average group consisted of 2.3 people, including adults (2.0) and children (0.3).

User groups at sections of the Coast Path in Anglesey, Gwynedd and Ceredigion tended to have the largest average number of adults per group (an average of 2.2 adults). Those on sections of the path in Anglesey contained the highest average number of children (0.4 per group).

Average group sizes tended to be slightly larger in rural areas (2.4) than in urban areas of the Coast Path (2.1).

Figure 5 – Group composition: average number of adults and children in entire group – by region and rurality (%)

	All	North Coast	Anglesey	Gwynedd	Ceredigion	Pembrokeshire	Carmarthen Bay & Gower	South Coast	Urban	Rural
Adults	2.0	1.8	2.2	2.2	2.2	2.1	2.0	1.9	1.9	2.1
Children	0.3	0.3	0.4	0.3	0.3	0.3	0.2	0.1	0.2	0.3
Total (adults and children)	2.3	2.1	2.6	2.6	2.5	2.4	2.2	2.0	2.1	2.4
<i>Number of respondents:</i>	1519	306	208	168	143	156	207	331	570	949

Average group sizes also tended to be to be larger in spring and summer months (when the average group consisted of 2.4 people), than in the autumn and winter (2.2).

Figure 6 – Group composition: average number of adults and children in entire group – by season (%)

	All	Winter	Spring	Summer	Autumn
Adults	2.0	2.0	2.1	2.1	2.0
Children	0.3	0.2	0.3	0.3	0.2
Total (adults and children)	2.3	2.2	2.4	2.4	2.2
<i>Number of respondents:</i>	1519	178	177	845	319

Area of residence

Figure 7a examines the area of residence of Wales Coast Path users by Coast Path section. Three fifths (62%) of those using the Coast Path were Welsh residents, while a third (35%) were from England and 2% were from outside of the UK.

The proportion of visitors from England (35%) represents a slight increase since 2015 when fewer (32%) of Coast Path users were visiting from England.

The proportion of Wales based visitors varied according to the section of the Coast Path used - those walking along the South Coast and Carmarthen Bay & Gower were most likely to be Welsh residents (84% and 76% of Coast Path users on these sections respectively were from Wales), while those on the Path in Anglesey and Gwynedd were most likely to have come from England (66% and 52% respectively).

Figure 7a – Visitors by area of residence – by Coast Path region (%)

Area of residence:	All 2015	All 2019-21	Wales Coast Path region (2019-21)						
			North Coast	Anglesey	Gwynedd	Ceredigion	Pembrokeshire	Carmarthen Bay & Gower	South Coast
Wales	65	62	65	33	47	53	59	76	84
England	32	35	33	66	52	42	38	20	14
Scotland / Northern Ireland	0	0	0	0	1	1	-	-	-
Non-UK	2	2	2	0	-	4	3	4	2
<i>Number of respondents (excluding those refusing to provide home location – 92 respondents, 6%):</i>	1357	1427	256	204	161	139	154	198	315

In the spring and summer months, visitors from England made up approaching half (45%) of all visitors, in comparison with around one in twenty in autumn and winter months (see figure 7b).

Figure 7b – Visitors by area of residence – by season (%)

Area of residence:	All	Winter	Spring	Summer	Autumn
Wales	62	81	54	54	78
England	35	18	45	45	21
Scotland / Northern Ireland	0	-	1	0	-
Non-UK	2	1	-	3	1
<i>Number of respondents (excluding those refusing to provide home location – 92 respondents, 6%):</i>	1427	171	170	778	308

A detailed analysis of home location (by Welsh Local Authority and English Region) can be seen in figure 7c. It shows that Wales residents tended to live relatively near to the section of Coast Path they were using – for example 59% of visitors to the Path along the North Coast were from Conwy, Flintshire or Denbighshire.

Wales Coast Path visitors from England were most likely to reside in North West England (who were most likely to be visiting sections of the Coast Path in Anglesey and Gwynedd), or the West Midlands (mostly using Sections of the Coast Path in Ceredigion or Gwynedd) – see figure 7c.

Figure 7c – Visitors by area of residence – detailed breakdown – by Coast Path region (%)

	All	North Coast	Anglesey	Gwynedd	Ceredigion	Pembrokeshire	Carmarthen Bay & Gower	South Coast
Wales	62	65	33	47	53	59	76	84
Swansea	7	-	-	1	2	2	44	2
Conwy	6	28	2	-	-	1	1	1
Gwynedd	5	3	5	30	1	-	1	1
Vale of Glamorgan	5	-	0	1	1	1	2	17
Flintshire	4	20	1	1	-	-	-	-
Isle of Anglesey	4	1	19	9	-	-	-	-
Carmarthenshire	4	-	1	1	3	10	18	-
Neath Port Talbot	4	-	-	-	2	-	2	14
Cardiff	4	0	1	-	4	4	3	13
Ceredigion	3	0	-	-	29	1	-	-
Pembrokeshire	3	-	-	-	-	28	2	-
Bridgend	3	-	-	-	1	2	1	13
Denbighshire	2	11	0	1	-	-	1	-
Newport	2	-	-	1	-	1	1	7
Monmouthshire	2	-	-	-	-	1	1	6
Rhondda Cynon Taf	2	-	-	-	4	3	1	5
Wrexham	1	0	1	2	-	1	-	-
Caerphilly	1	0	0	-	1	3	-	2
Powys	1	1	0	1	3	-	1	0
Torfaen	1	-	-	1	1	-	1	2
Merthyr Tydfil	1	-	-	-	1	1	1	1
Blaenau Gwent	-	-	-	-	-	-	-	-
England	35	33	66	52	42	38	20	14
North West England	12	18	36	24	2	3	2	1
West Midlands	8	9	6	16	18	8	4	2
South East England	4	2	5	2	4	6	2	4
South West England	4	1	2	3	5	8	6	6
Yorkshire and Humber	3	1	9	3	5	3	2	-
East Midlands	2	2	2	2	4	4	2	1
East of England	1	-	2	1	2	2	1	-
Greater London	1	1	2	1	1	3	2	1
North East England	0	0	1	1	-	-	-	-
Scotland / Northern Ireland	0	0	0	1	1	-	-	-
Non-UK	2	2	0	-	4	3	4	2
<i>Number of respondents (excluding those refusing to provide home location – 92 respondents, 6%):</i>	1427	256	204	161	139	154	198	315

Figure 8 below provides an illustration of the residence of Coast Path visitors, demonstrating that a high proportion were local visitors or from Western regions of England.

Figure 8 – Map showing Wales Coast Path user home location



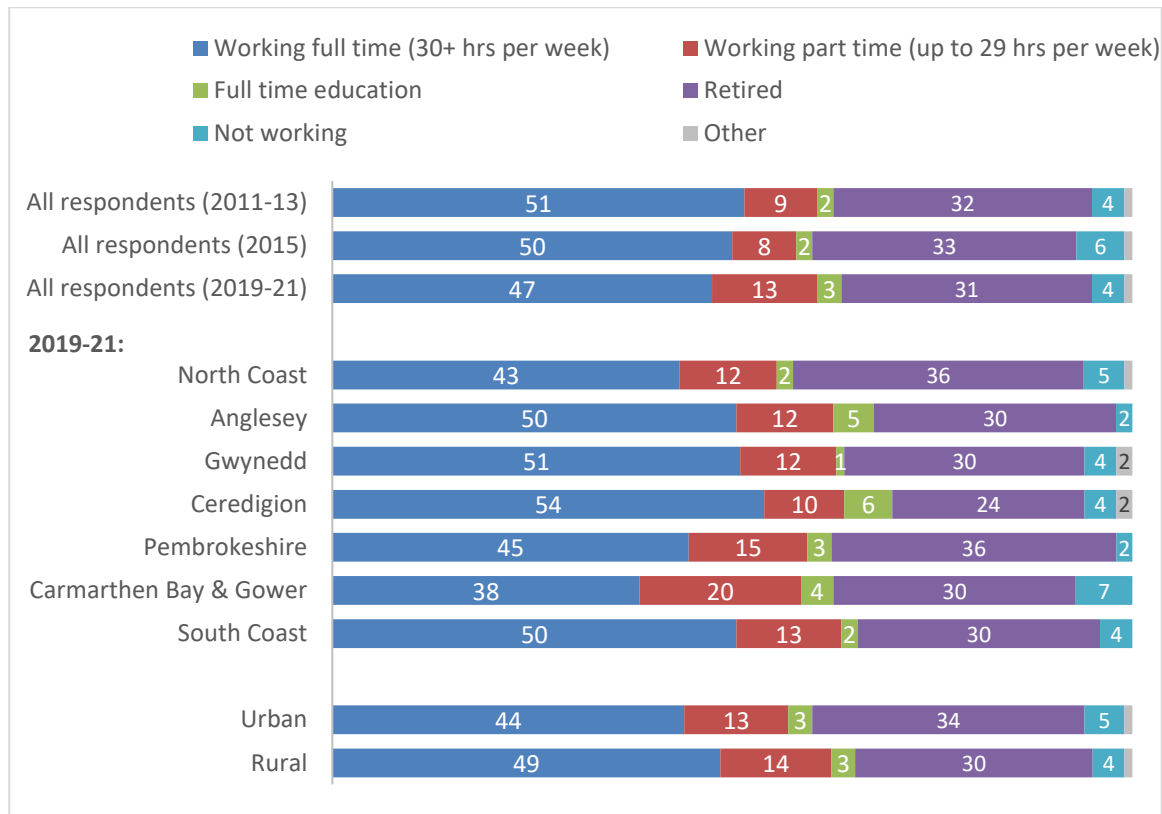
Working status

Although most respondents interviewed were working (47% full time; 13% part time), three in ten were retired (31%). Only 3% were in full-time education and 4% were neither working nor in full time education.

The proportion of Coast Path users in work (either full time or part time) has remained relatively stable over time – approximately three fifths were in work in 2011-13 (60%), 2015 (58%) and 2019-21 (60%).

Coast Path users interviewed along the North Coast and Pembrokeshire sections of the path were most likely to be retired (36% in each area respectively), while those in Ceredigion were most likely to be working (64%) – reflected in the younger age profile of those on sections of the path in Ceredigion.

Figure 9 – Working status – by region and rurality (%)

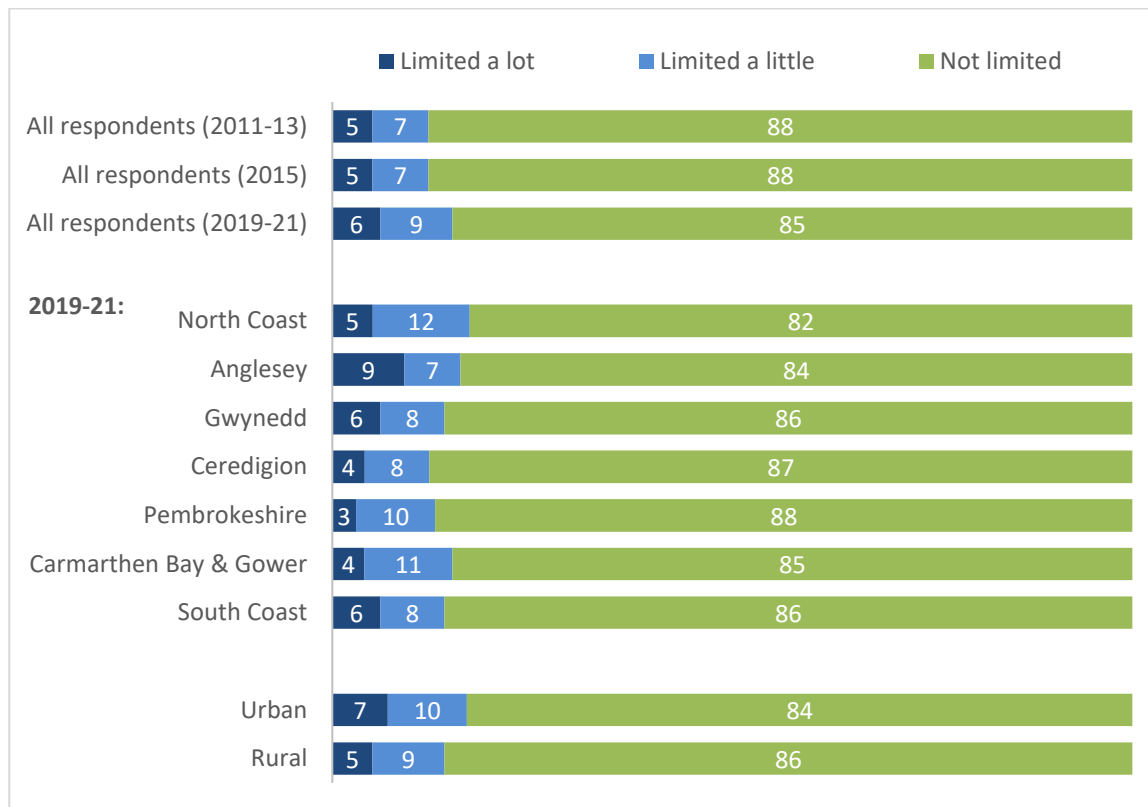


Limiting health problem/disability

The survey recorded whether visitors to the Wales Coast Path had health problems or disabilities (lasting longer than 12 months) that limited their day-to-day activities. A total of 15% of Coast Path users reported they (or another group member) had a limiting illness/disability (6% limiting ‘a lot’ and 9% ‘a little’). This represents a slight increase from a figure of 12% recorded in the 2015 and 2011-13 surveys.

Respondents and their party members along the North Coast were more likely to have a limiting health problem or disability (17%), while those in Ceredigion were the least likely to have a limiting health problem or disability (12%) – possibly linked to the younger age profile of Coast Path users in Ceredigion.

Figure 10 – Limiting health problem/disability – by region and rurality (%)

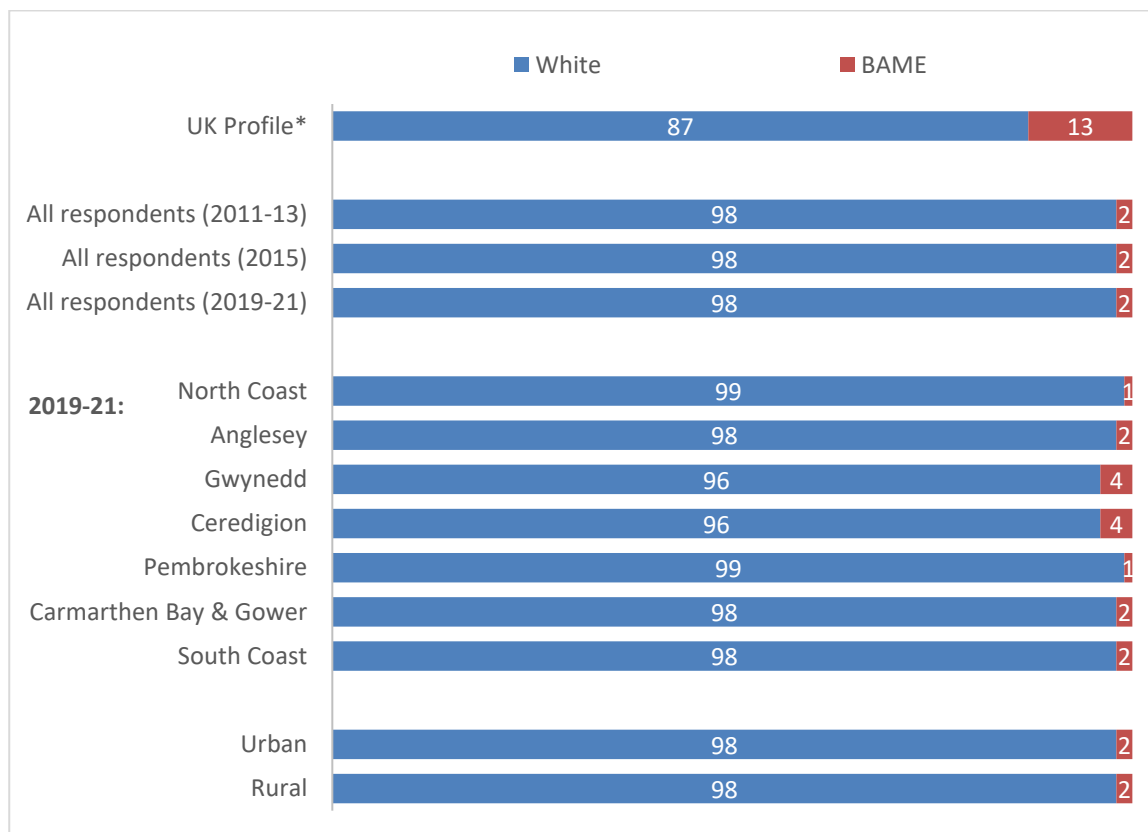


Number of respondents (excluding 'not answered' – 5 respondents, 0%): All 2011-13 (1,531), all 2015 (1,473), all 2019-21 (1,514), North Coast (305), Anglesey (206), Gwynedd (168), Ceredigion (143), Pembrokeshire (155), Carmarthen Bay & Gower (207), South Coast (330), urban (569), rural (945).

Ethnicity

As was the case in previous studies, the ethnic profile of respondents was primarily White (98%), while 2% belonged to BAME groups, compared with 13% of the UK population, according to the 2011 Census.

Figure 11 – Ethnicity – by region and rurality (%)



Number of respondents (excluding 'prefer not to say' – 11 respondents, 1%): All 2011-13 (1,566), all 2015 (1,483), all 2019-21 (1,508), North Coast (302), Anglesey (207), Gwynedd (167), Ceredigion (143), Pembrokeshire (154), Carmarthen Bay & Gower (204), South Coast (331), urban (565), rural (943).

*Source: Census 2011 data table KS201UK

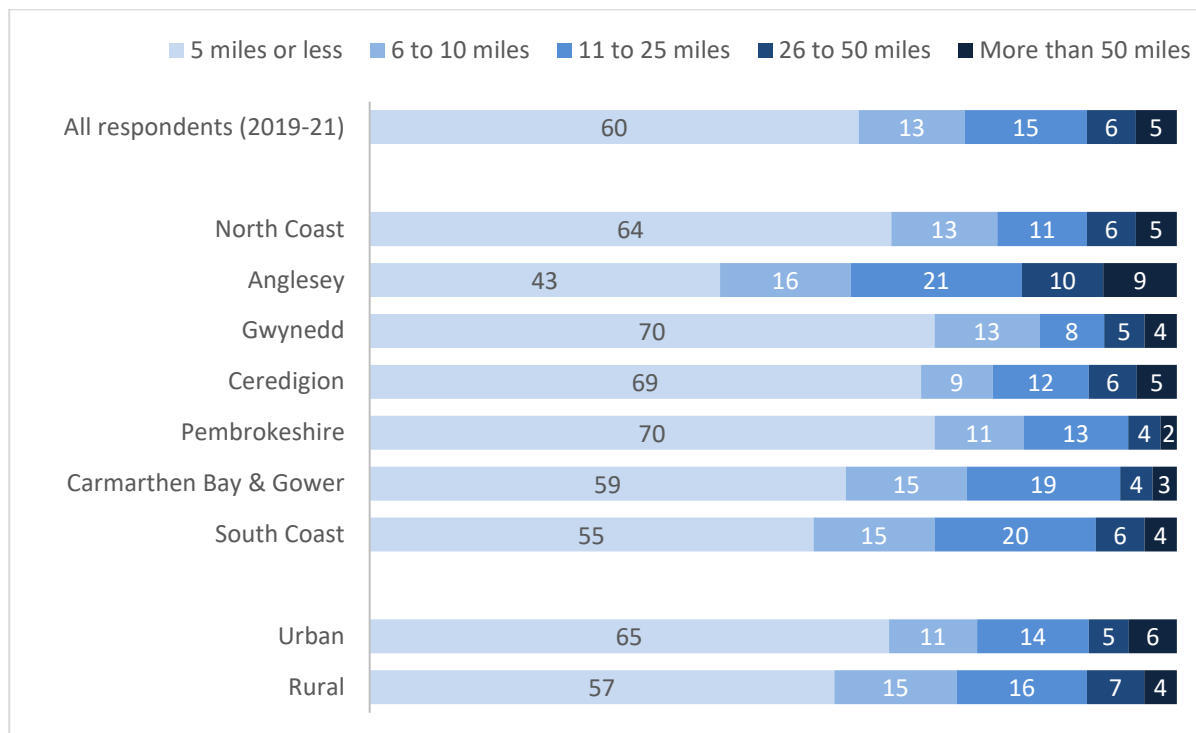
Using the Wales Coast Path

Travelling to the coast path

Distance travelled to reach the Wales Coast Path

Most Coast Path users had travelled relatively short distances to reach the Coast Path from where they were staying the night before, with three fifths (60%) travelling five miles or less. This was most likely to be the case for those using the Coast Path in Gwynedd (70%), Pembrokeshire (also 70%), and Ceredigion (69%). Those using the Coast Path in Anglesey were somewhat more likely to have travelled from further afield, with almost one in ten (9%) having travelled 50 miles or more.

Figure 12 – Distance travelled (from home or accommodation last night) to reach the Wales Coast Path – by region and rurality (%)



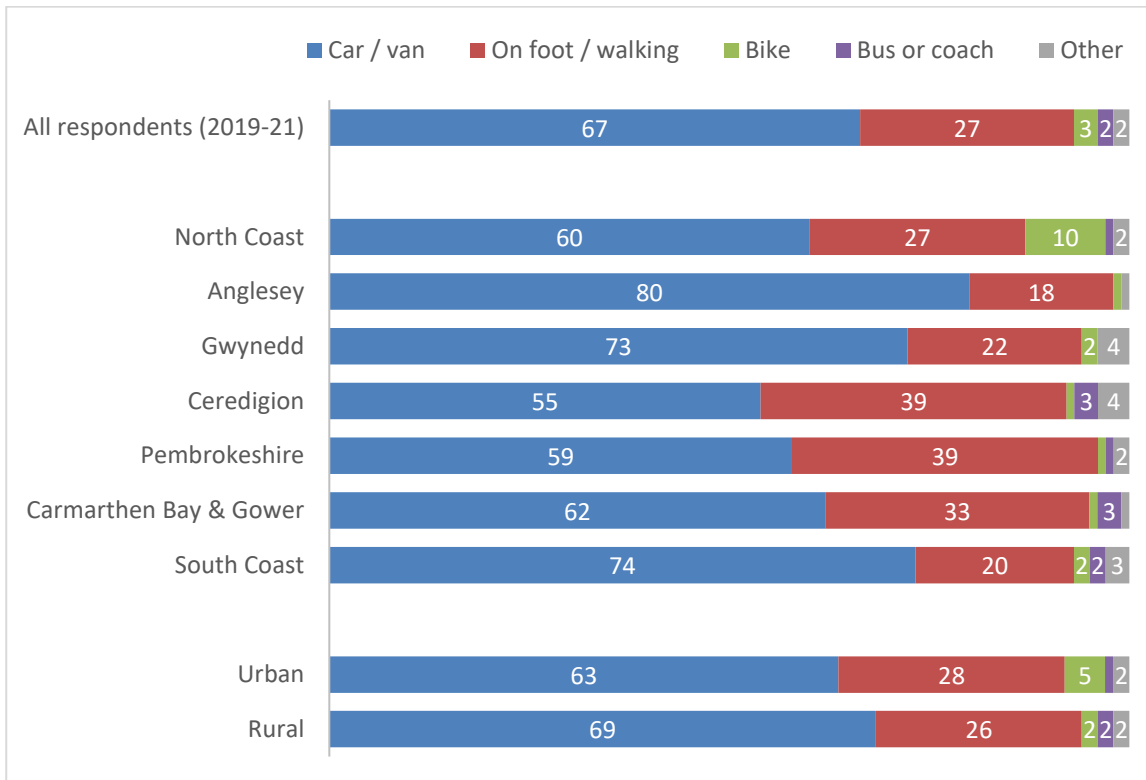
Number of respondents (excluding 'don't know' – 37 respondents, 2%): 2019-21 (1,482), North Coast (287), Anglesey (205), Gwynedd (166), Ceredigion (137), Pembrokeshire (152), Carmarthen Bay & Gower (205), South Coast (330), urban (560), rural (922).

Mode of transport used to reach the Wales Coast Path

Cars / vans were predominantly the primary mode of transport to reach the Coast Path, used by two thirds (67%) of those on the Coast Path. However, more than a quarter (27%) walked, while other forms of transport were used by fewer than one in ten (7%).

Users of the Coast Path in Ceredigion and Pembrokeshire were more likely to have reached the Coast Path by foot (39% doing so) than users in other areas, while users of the Coast Path in Anglesey were the most likely to have driven to the path (80% doing so). Those on North Coast sections of the Coast Path were the most likely to have reached the path by bike, with one in ten (10%) cycling to the Coast Path in this area.

Figure 13 – Mode of transport used to reach the Wales Coast Path – by region and rurality (%)



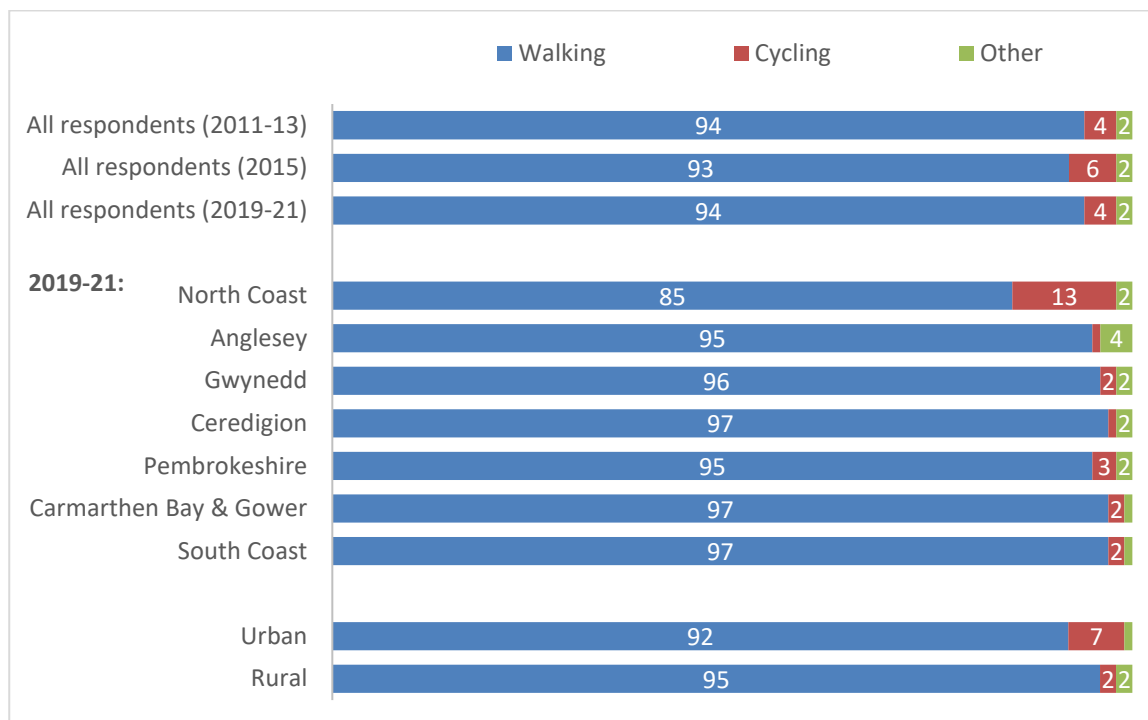
Number of respondents (excluding 'not answered' – 11 respondents, 1%): All 2019-21 (1,508), North Coast (303), Anglesey (206), Gwynedd (167), Ceredigion (143), Pembrokeshire (155), Carmarthen Bay & Gower (207), South Coast (327), urban (563), rural (945).

Modes of transport used on Coast Path

Consistently, the vast majority of respondents were walking along the Wales Coast Path when interviewed (94% in 2019-21). Fewer than one in twenty cycled (4%) and only a small proportion (2%) used other forms of transport (e.g. using an assisted/disability vehicle, motorised vehicle or horse riding).

This pattern remained consistent across all regions of the Coast Path, with the exception of cyclists being much more prevalent along sections of the North Coast Path (13%) than in other areas. This contributed to a higher proportion of cyclists using the path in urban sections (7%), than in rural parts (2%).

Figure 14 – Mode of transport used on Wales Coast path – by region and rurality (%)



Number of respondents: All 2011-13 (1,566), all 2015 (1,483), all 2019-21 (1,519), North Coast (306), Anglesey (208), Gwynedd (168), Ceredigion (143), Pembrokeshire (156), Carmarthen Bay & Gower (207), South Coast (331), urban (570), rural (949).

Cycling on the Wales Coast Path was a seasonal activity, with just 1% of Coast Path users cycling on the Coast Path during periods containing winter months (October to March), compared with 5% of those using the Coast Path between May and September.

Type of trip

Proportion of staying/day visitors

The overall proportion of respondents who were staying visitors (those staying overnight or as part of a longer holiday) has remained relatively consistent across the survey periods, with approximately two fifths (42%) of Coast Path users being staying visitors in 2019-21, compared with 39% in both 2015 and 2011-13 surveys (see figure 15).

The slight increase in the proportion of overnight stays in the latest survey is largely driven by a high proportion of Coast Path users interviewed ‘post-Covid’ (in May and June 2021, when UK Covid restrictions had eased, but international travel remained largely restricted), being staying visitors. More than half of Coast Path visitors during this period were staying overnight (55%), which was a proportion 13 percentage points greater than the equivalent (May and June) months of the 2015 survey (42% staying overnight).

There was considerable variation in the proportion of staying visitors according to the area in which the Coast Path was located. For example, the vast majority of respondents on sections of the Path along the South Coast were day-trip visitors (87%). This reflected the finding that in this area, the vast majority of those using the Coast Path resided in South

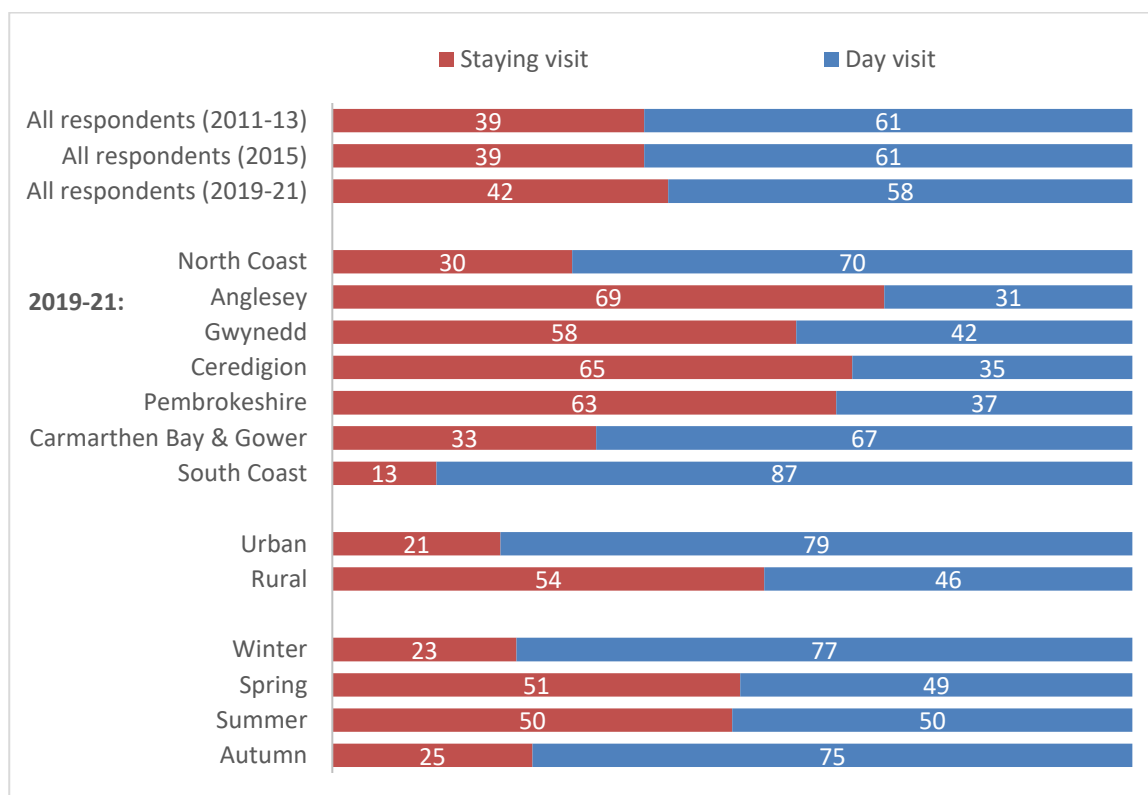
Wales local authorities (82%). Also, seven in ten respondents interviewed along the North Coast were day-trip visitors (70%), as were a similar proportion of those in Carmarthen Bay & Gower (67%).

Highest proportions of staying visitors were evident in Anglesey (69%), Ceredigion (65%), Pembrokeshire (63%) and Gwynedd (58%) – see figure 15.

Respondents using the Path on a day-trip to the area were much more prevalent in urban areas (79%) of the Wales Coast Path than rural areas (46%).

In the spring and summer months, staying visitors accounted for half of Wales Coast Path users, in comparison with half this proportion (approximately a quarter), in the autumn and winter.

Figure 15 – Type of trip – by region, rurality and season (%)



Number of respondents: All 2011-13 (1,566), all 2015 (1,483), all 2019-21 (1,510), North Coast (304), Anglesey (207), Gwynedd (168), Ceredigion (142), Pembrokeshire (155), Carmarthen Bay & Gower (207), South Coast (327), urban (565), rural (945).

Those belonging to more affluent socio-economic groups (AB) were more likely to be staying visitors than those from lower socio-economic groups DE (31%).

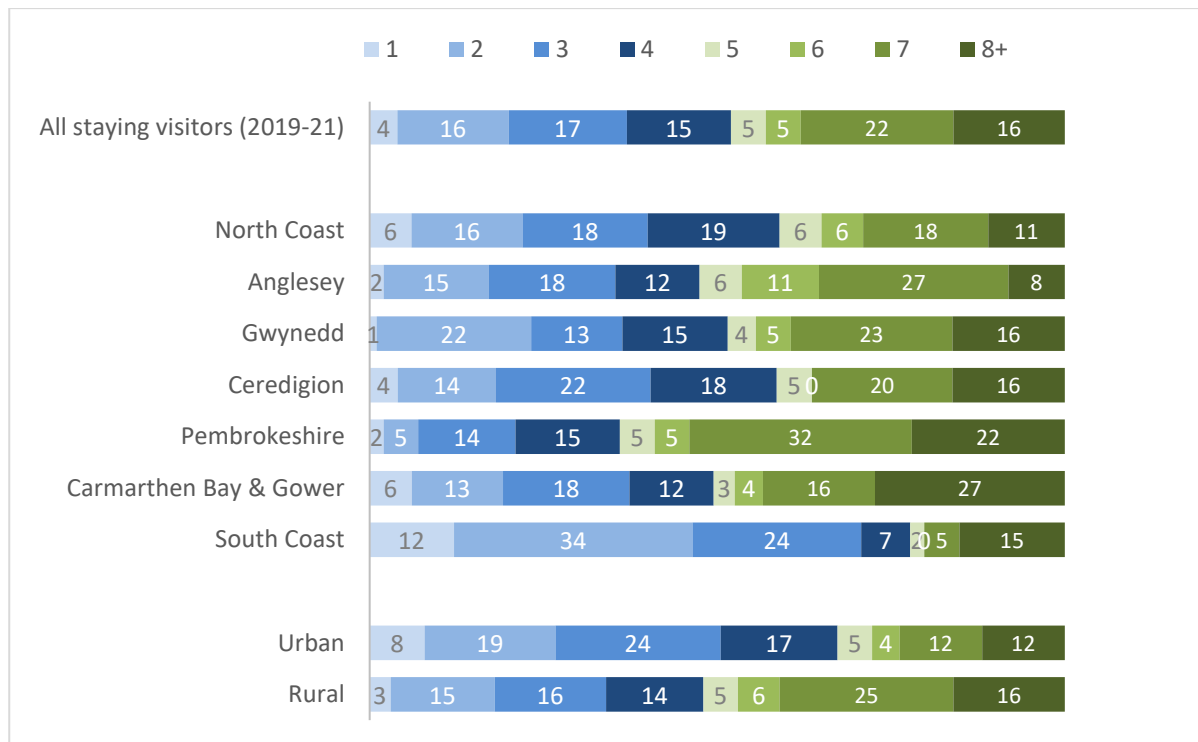
Number of nights staying in Wales (staying visitors)

The survey went on to ask staying visitors how many nights they were staying in Wales, and of these, on how many separate days they would be using the Wales Coast Path.

The average number of nights spent in Wales by staying visitors was 6.4. One in five (20%) were staying one or two nights, almost a third (32%) for three or four nights, approximately another third (32%) were staying for between five and seven nights, while 16% were staying for more than a week.

Those using sections of the Coast Path in Pembrokeshire and the Gower stayed the longest on average (7.2 and 7.3 nights respectively). While those in Anglesey averaged the shortest stays – an average of 5.2 nights.

Figure 16 – Number of nights staying in Wales (staying visitors) - by region and rurality (%)



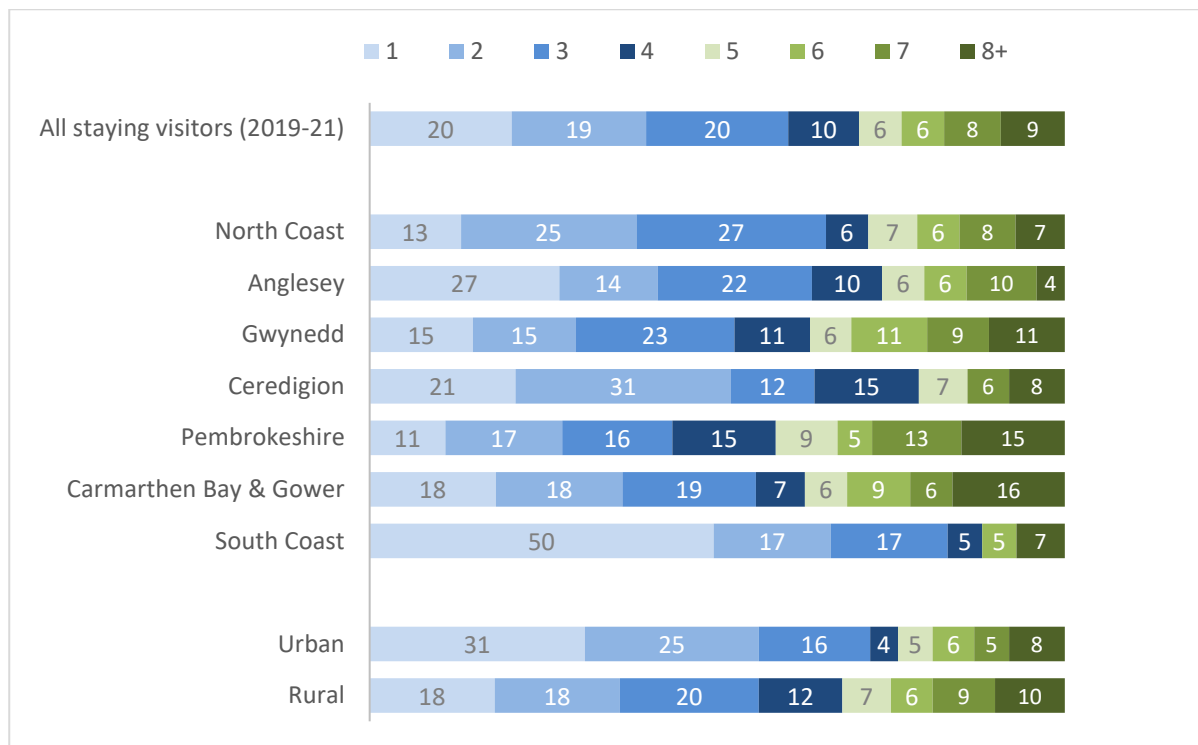
Number of respondents (staying visitors, excluding 'refused'/'not answered' – 6 respondents, 1%): 2019-21 (623), North Coast (88*), Anglesey (142), Gwynedd (97*), Ceredigion (92*), Pembrokeshire (96*), Carmarthen Bay & Gower (67*), South Coast (41*), urban (113), rural (510).

*Care should be taken when interpreting data based on a small number of respondents.

Of the average of 6.4 nights spent in Wales, users reported they would be using the Wales Coast Path most days - an average of 4.5 days (70% of the nights stayed).

Staying visitors in Gwynedd and Carmarthen Bay & Gower used the Coast Path for the most days – an average of 5.5 days for each, while those on sections of the Coast Path on the South Coast only used it for an average of 3 days during their stay.

Figure 17 – Number of days intend to use the Coast Path (staying visitors) – by region and rurality (%)



Number of respondents (staying visitors, excluding 'don't know' – 25 respondents, 4%): 2019-21 (604), North Coast (83*), Anglesey (134), Gwynedd (94*), Ceredigion (89*), Pembrokeshire (95*), Carmarthen Bay & Gower (67*), South Coast (42*), urban (111), rural (493).

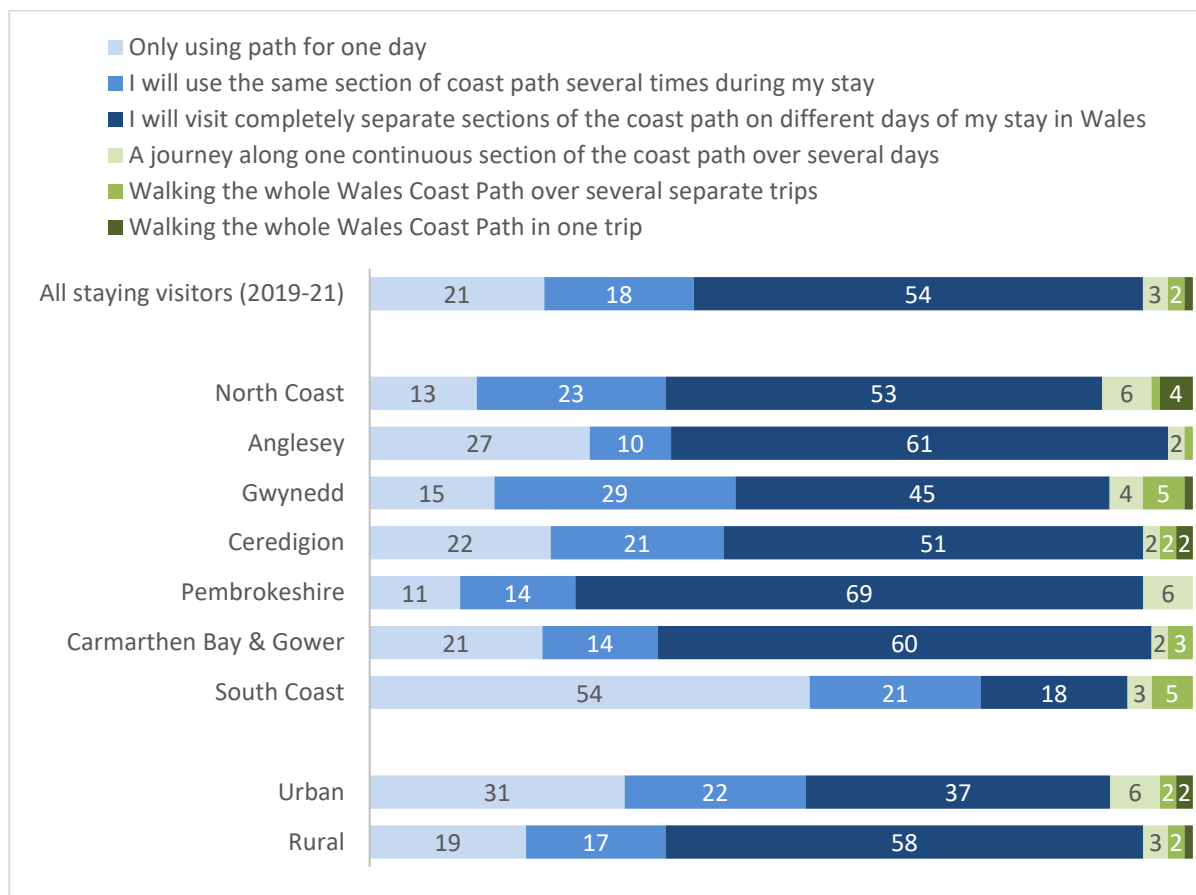
*Care should be taken when interpreting data based on a small number of respondents

Wales Coast Path use type (staying visitors)

The vast majority (79%) of staying visitors intended to use the Wales Coast path on more than one day. The majority - more than half (54%) - intended to visit different sections of the path on different days of their stay, with fewer - around one in five (18%) - intending to repeatedly use the same section of path several times during their stay. Of the remainder, 4% intended to journey along one continuous section of the path over several days, 3% were intending to walk the whole Wales Coast Path over several separate trips and 1% were doing so in one trip.

Staying visitors on the Coast Path in Pembrokeshire were the most likely to be visiting different sections of the Coast Path on different days of their stay (69%), while staying visitors using sections of the Coast Path on the South Coast were much less likely to do so (18%) and were more likely to be using the path for one day only (54%).

Figure 18 – Wales Coast Path use type (%)



Number of respondents (staying visitors, excluding 'don't know' – 25 respondents, 6%): 2019-21 (581), North Coast (83*), Anglesey (133), Gwynedd (93*), Ceredigion (87*), Pembrokeshire (88*), Carmarthen Bay & Gower (58*), South Coast (39*), urban (108), rural (473).

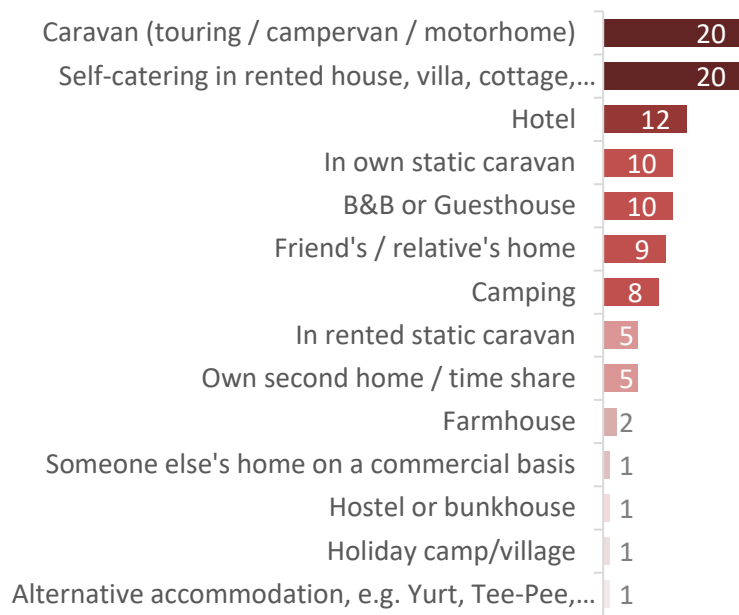
*Care should be taken when interpreting data based on a small number of respondents.

Accommodation used by staying visitors

Staying visitors were most likely to be staying in camping or caravan-based accommodation. Two fifths (43%) were in this type of accommodation, which comprised those in touring caravans / campervans / motorhomes (20%), those in their own static caravans (10%), camping (8%) and those in rented static caravans (5%).

Other types of accommodation commonly used included self-catering (in a rented house, villa, cottage, apartment or flat) (used by one in five, 20%), hotels (used by slightly more than one in ten (12%), B&Bs / guesthouses (10%), the homes of friends / relatives (9%) and their own homes or time shares (5%).

Figure 19 – Type of accommodation stayed in (%)



Number of respondents (staying visitors): 629

Analysis of accommodation types used by staying Coast Path users in each region is detailed in figure 20.

Figure 20 – Type of accommodation stayed in – by region and rurality

	All	North Coast	Anglesey	Gwynedd	Ceredigion	Pembrokeshire	Carmarthen Bay & Gower	South Coast	Urban	Rural
Caravan (touring / campervan / motorhome)	20	28	17	28	17	15	24	9	21	20
Self-catering in rented house, villa, cottage, apartment or flat	20	2	30	20	24	26	18	5	7	23
Hotel	12	18	13	3	10	10	13	23	23	9
In own static caravan	10	14	10	13	13	9	1	-	8	10
B&B or Guesthouse	10	7	11	9	9	13	9	5	10	9
Friend's / relative's home	9	8	6	3	11	6	12	37	11	9
Camping	8	1	7	13	5	10	10	5	3	9
In rented static caravan	5	12	4	7	2	3	1	2	4	5
Own second home / time share	5	6	3	6	3	5	6	5	5	4
Farmhouse	2	-	2	3	5	-	-	2	3	2
Someone else's home on a commercial basis	1	2	1	3	1	-	1	-	3	1
Hostel or bunkhouse	1	1	1	1	2	1	1	-	1	1
Holiday camp/village	1	1	1	-	2	-	1	-	1	1
Alternative accommodation, e.g. Yurt, Tee-Pee, Tree House, Hut, Ecopod etc.	1	-	1	1	1	-	1	-	1	1
<i>Number of respondents (staying visitors):</i>	629	90*	142	97*	92*	97*	68*	43*	116	513

*Care should be taken when interpreting data based on a small number of respondents.

Notable regional differences in relation to the type of accommodation used by staying visitors include:

- A high portion of visitors using North Coast sections of the Wales Coast Path were staying in caravans (28% touring / campervan / motorhomes, 14% in their own static caravan and 12% in a rented static caravans), and almost one in five (18%) were staying in a hotel.
- Those using the Coast Path in Anglesey were most likely to be staying in self-catering accommodation (30%) or a touring caravan/campervan/motorhome (17%).
- Users of the Coast Path in Gwynedd were most likely to be in a touring caravan/campervan/motorhome (28%), although one in five (20%) were staying in self-catering accommodation.

- Self-catering was the type of accommodation most used by those in Ceredigion (24%) and Pembrokeshire (26%), followed by touring caravans/campervans/motorhomes (17% and 15% respectively in Ceredigion and Pembrokeshire).
- Touring caravans/campervans/motorhomes were most popular among those in Carmarthen Bay & Gower (used by a quarter, 24%, of staying visitors).
- Those on the South Coast section of the path were most likely to be staying in a friend's / relative's home (37% doing so), or in a hotel (23%).

Regularity of using the Wales Coast Path

As was the case in previous years, the vast majority of respondents in 2019-21 were repeat visitors to the Wales Coast Path (91% cf. 93% in 2015 and 91% in 2011-13). First-time visitors therefore accounted for almost one in ten visitors in 2019-21 (9%), the proportion of which was highest in Anglesey (19%), followed by Ceredigion (14%) and Gwynedd (14%). See figure 21.

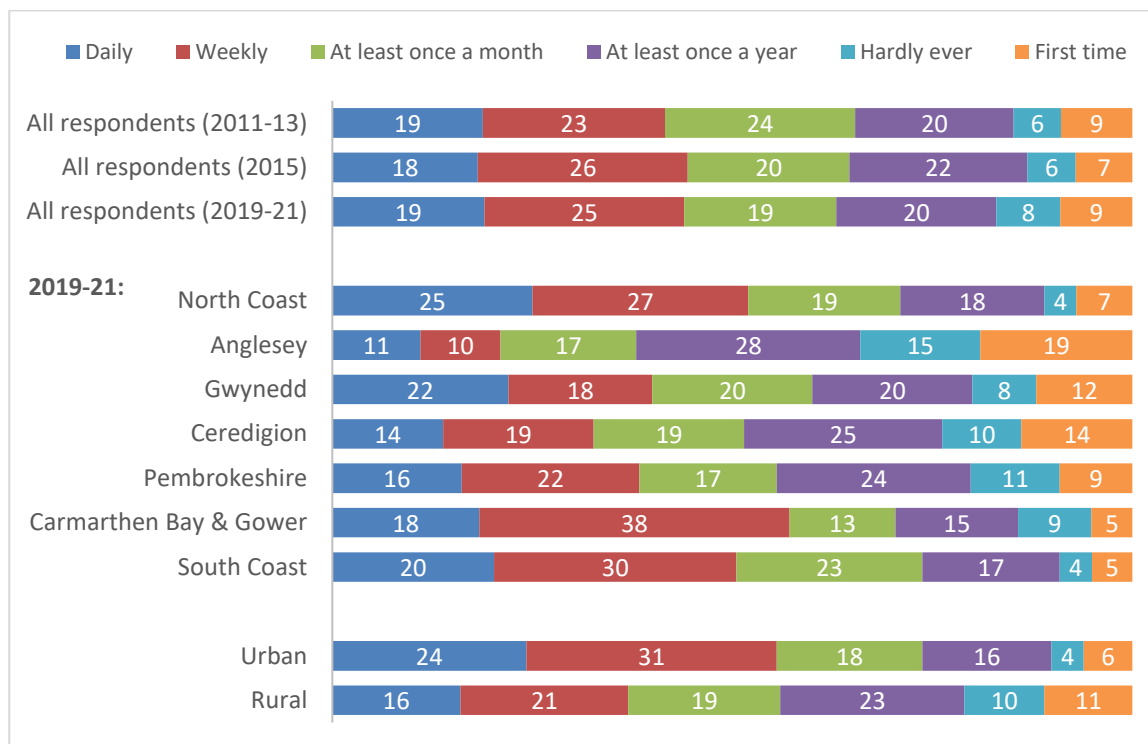
The proportion of first-time visitors was higher in 'post-Covid' months (May and June 2021 - when UK Covid restrictions had eased, but international travel restrictions were in place) - 15% of Wales Coast Path users were first-time visitors during this period, compared with 8% for the equivalent (May and June) interviewing months in 2015. Nonetheless, on the whole respondents tended to be fairly regular visitors to the Wales Coast Path, with three fifths (63%) using the Path once a month or more often (cf. 64% in and 66% in 2011-2013).

Daily visitors to the Wales Coast Path in 2019/21 accounted for almost a fifth of the respondents interviewed (19%); this proportion has remained unchanged since 2011-2013. Daily usage of the Path was highest along the North Coast (25%), and in Gwynedd (22%). Weekly visitors accounted for a quarter of all respondents (25%), while a fifth used a section of the Wales Coast Path at least once a month (19%).

A further fifth used the Path at least once a year (20%), with infrequent visitors (hardly ever using the Path) accounting for fewer than one in ten (8%) of the sample. Respondents using sections of the Path in Anglesey were most likely to 'hardly ever' use the Wales Coast Path (15%) – see Figure 21.

Respondents using the Path in urban locations were more likely to be visiting on a regular basis (once a month or more often) (73%) than those in rural areas (56%).

Figure 21 – Regularity of using the Wales Coast Path – by region and rurality (%)



Number of respondents (excluding 'refused'/'not answered' – 17 respondents, 1%): All 2011-13 (1,549), all 2015 (1,477), all 2019-21 (1,502), North Coast (304), Anglesey (207), Gwynedd (168), Ceredigion (140), Pembrokeshire (152), Carmarthen Bay & Gower (203), South Coast (328), urban (563), rural (939).

The vast majority of day-trip visitors interviewed in 2019-21 were repeat visitors to the Wales Coast Path (96%); moreover, 83% of those staying overnight or as part of a longer holiday were also repeat visitors.

As might be expected, day-trip visitors were significantly more likely to use the Wales Coast Path at least once a week (66%) compared to staying visitors (13%); staying visitors tended to use the Path around once a year (36%), hardly ever (15%), or were visiting for the first time (17%).

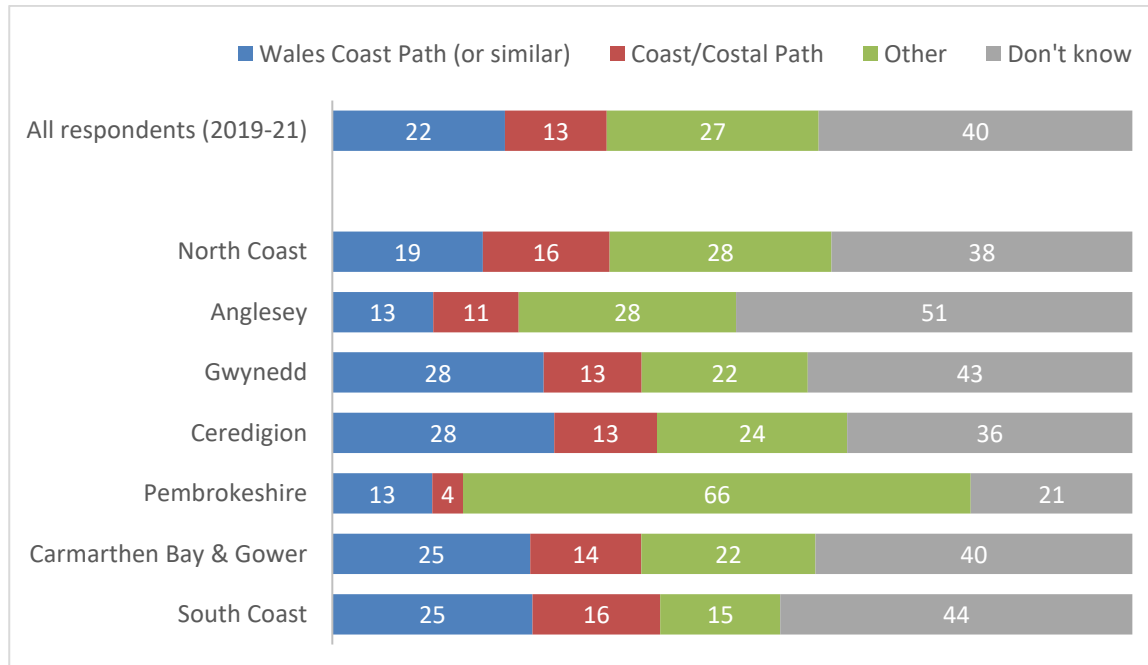
Awareness of path name

The survey also asked respondents if they knew the name of the 'long distance path' they were on. Without prompting, a fifth (22%) of respondents referred to the path as the 'Wales Coast Path' (or very similar e.g. Welsh Coast Path / Coast Path of Wales etc.). A further one in ten (13%) generically referred to it as a 'coast path' or 'coastal path', while a further quarter (27%) used another (predominantly regional / local) name for the path. Two fifths (40%) did not know the name for the path they were using.

Awareness and usage of names varied depending on the section of the Wales Coast Path being used - For example more than half (51%) of those interviewed in Anglesey did not know a name for the coast path they were using, while those in Pembrokeshire were most likely to refer to the path as the 'Pembrokeshire Coast Path' than any other name (with 49% doing so).

Those on sections off the Wales Coast Path in Anglesey and Gwynedd were the most likely to refer to the path they were on as the 'Wales Coast Path' (28%).

Figure 22 – Name used by respondents to describe “long distance path” used – by region (%)



Number of respondents: All 2019-21 (1,519), North Coast (305), Anglesey (208), Gwynedd (168), Ceredigion (143), Pembrokeshire (156), Carmarthen Bay & Gower (207), South Coast (331).

Multiple path names could be given - Totals may exceed 100%.

The 'other' names used tended to be regional names relating to the location where users were interviewed. The main 'other' responses, by Coast Path section are summarised below:

North Coast

- North Wales Coast Path (6%)
- Jubilee Path (5%)

Gwynedd

- North Wales Coast Path (4%)
- Y/The Maes (4%)

Pembrokeshire

- Pembrokeshire Coast Path (49%)
- Dinas Head / Island (4%)

Anglesey

- Anglesey Coast Path (17%)
- North Wales Coast Path (3%)

Ceredigion

- Ceredigion Coast Path (12%)

Carmarthen Bay & Gower

- Gower Way / Gower Coast Path (7%)
- Millennium Coast Path (4%)

Reasons for using the Wales Coast Path

Purpose of visit

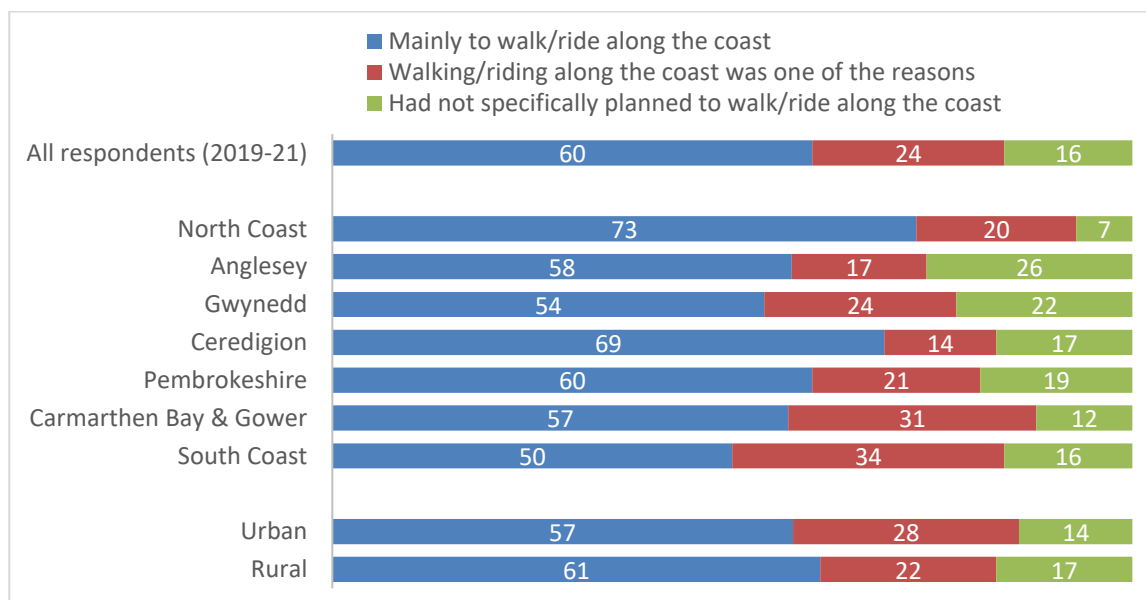
One of the early survey questions established whether using the path was the main purpose of their day out, one of the reasons, or if they had not specifically planned to use the Coast Path.

The Coast Path was the main purpose of their day out for most users (three fifths, 60%), and one of the reasons for their day out for a further quarter (24%). Just one in seven (16%) Coast Path users had not specifically planned to walk / ride along the coast. See figure 23.

Using the Coast Path was most likely to be the main reason for their day out among those using sections of the Coast Path on the North Coast and in Ceredigion (being the main reason for 73% and 69% respectively), while those using sections of the Coast Path in Anglesey and Gwynedd were the least likely to have specifically planned to use the Coast Path (25% and 22% respectively). Those using South Coast sections of the Coast Path were most likely to say walking / riding along the path was one of the reasons for their day out (for 34%).

Those on urban sections of the Wales Coast Path were slightly more likely to be combining their use of the Coast Path with another activity that day, than those on rural sections (28% and 22% on urban / rural sections of the Coast Path doing so respectively). This was also more likely to be the case for those using the Coast Path between July and September (36%).

Figure 23 – Purpose of day out – by region and rurality (%)



Number of respondents (excluding 'don't know'/'not answered' – 20 respondents, 1%): All 2019-21 (1,499), North Coast (303), Anglesey (205), Gwynedd (162), Ceredigion (142), Pembrokeshire (154), Carmarthen Bay & Gower (205), South Coast (328), urban (565), rural (934).

Motivation for visit

When asked about motivations for using the Wales Coast Path, scenery / views was the reason most cited (by two thirds, 66%) – see figure 13. For more than half, health / exercise (56%) and for fresh air or to enjoy pleasant weather (54%) were the reasons for using the Coast Path, while for more than two fifths (45%), the ability to relax and unwind whilst on the Coast Path was a motivation.

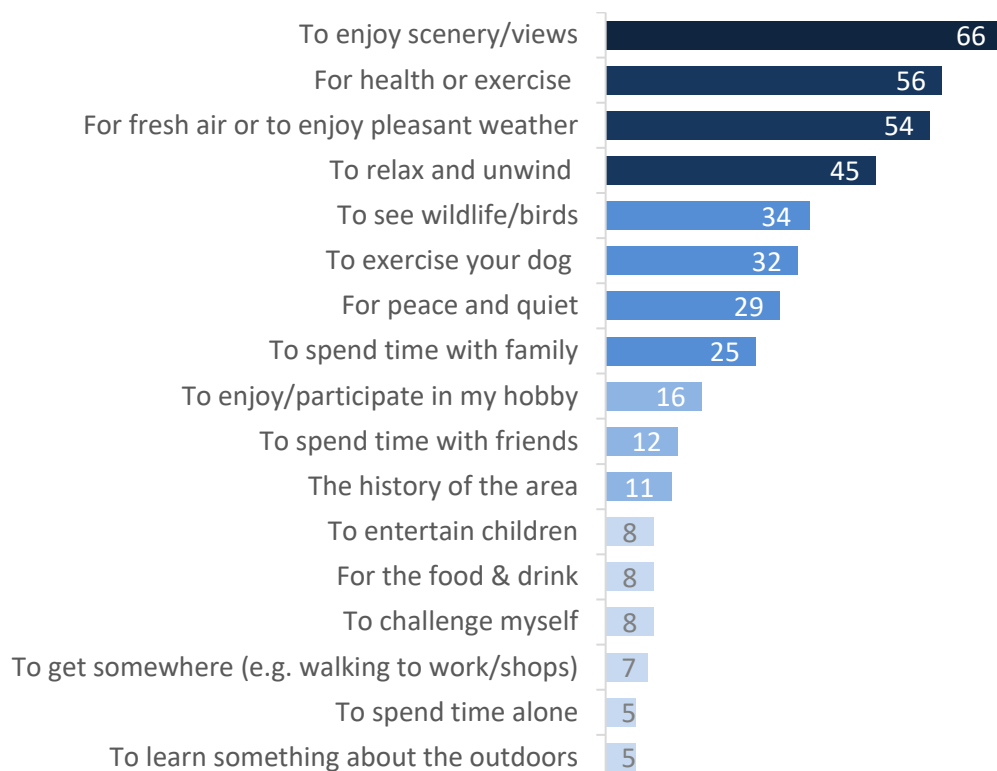
Health and exercise were particularly likely to be the draw for those cycling (68%), those using the North Coast section of the Coast Path (62%), and among weekly users of the Path (65%). Those using the Coast Path to relax and unwind were more likely to be first time visitors (a reason for visiting among 57% of this cohort).

Activities such as exercising a dog or seeing wildlife / birds were reasons for around a third (32% and 34% respectively), with wildlife / birds particularly likely to be a reason for those using the Ceredigion section of the Coast Path (59%).

Those using the Coast Path to exercise their dogs made up a greater proportion of visitors during the first and last quarters of the year - 40% of those using the Coast Path between January and March and 43% of those using the Coast Path between October and December were exercising their dogs. Very frequent users of the Coast Path were also particularly likely to be dog walkers – 57% of those using the Coast Path daily were doing so to exercise their dog.

Other main reasons included for peace and quiet – a reason for almost three in ten (29%), and to spend time with family – a reason for a quarter (25%), and a reason more likely to be given by those visiting the Coast Path between July and September (30%). Other reasons given by a smaller proportion of visitors (fewer than one in five), included those participating in a hobby, spending time with friends and visiting due to the history of the area - see figure 24.

Figure 24 – Reasons for using the Wales Coast Path (%)



Number of respondents (all): 1,519

Distance and time spent travelling along the Wales Coast Path

Distance travelled along Wales Coast Path

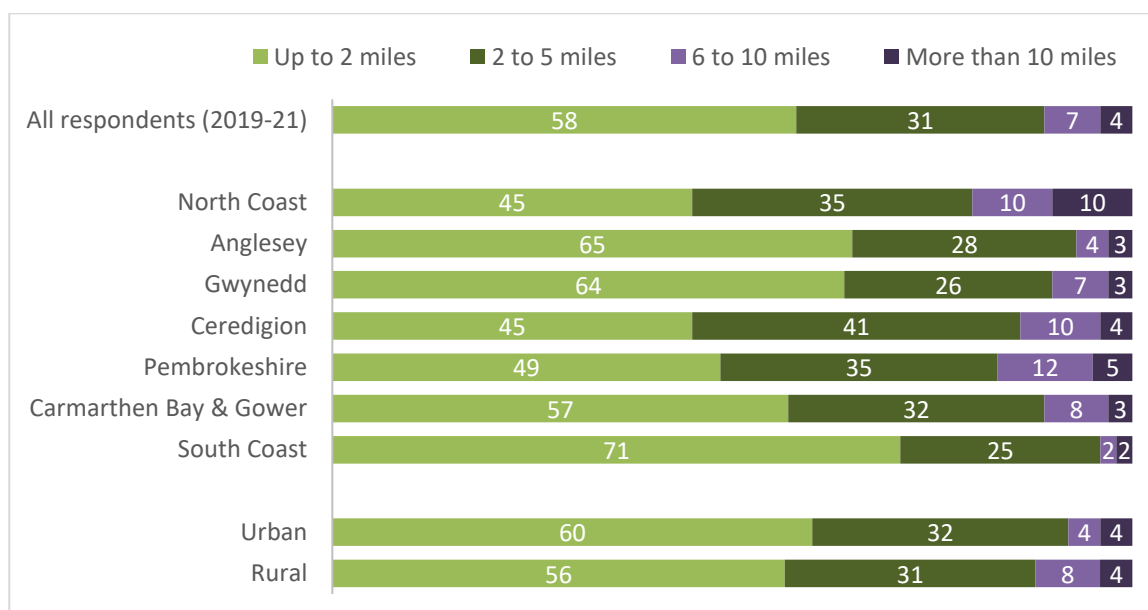
Respondents were asked to estimate the distance they had travelled along the Coast Path, between their start point on the path and the furthest point from that start point on the path.

Most, almost three fifths (58%), had travelled relatively short distances along the path (up to two miles) and a further three in ten (31%) had travelled along 2 to 5 miles of the path. Just one in ten (11%) travelled along more than 5 miles of the Coast Path. See figure 25.

Possibly reflecting the higher proportion of cyclists on this section of the Coast Path, those on the North Coast tended to have travelled furthest – One in five (20%) travelling along more than five miles of the Coast Path.

Those on the South Coast, followed by those on the Anglesey and Gwynedd sections of the path, were more likely to be using shorter sections of the Coast Path – around two thirds (71%, 65% and 64% of those in each of these areas respectively), had travelled along up to two miles of the Coast Path.

Figure 25 – Distance travelled along the coast path (on day of interview, between start point on the path and furthest point on the path) – by regionality and rurality (%)



Number of respondents (excluding 'don't know' – 27 respondents, 2%): All 2019-21 (1,492), North Coast (301), Anglesey (201), Gwynedd (168), Ceredigion (141), Pembrokeshire (154), Carmarthen Bay & Gower (205), South Coast (322), urban (556), rural (936).

Staying visitors tended to travel longer distances - Almost half, 49%, travelled 2 miles or more along the Coast Path, compared with 37% of day visitors.

As might be expected, those cycling travelled longer distances (32% travelled more than ten miles compared with just 3% of those walking).

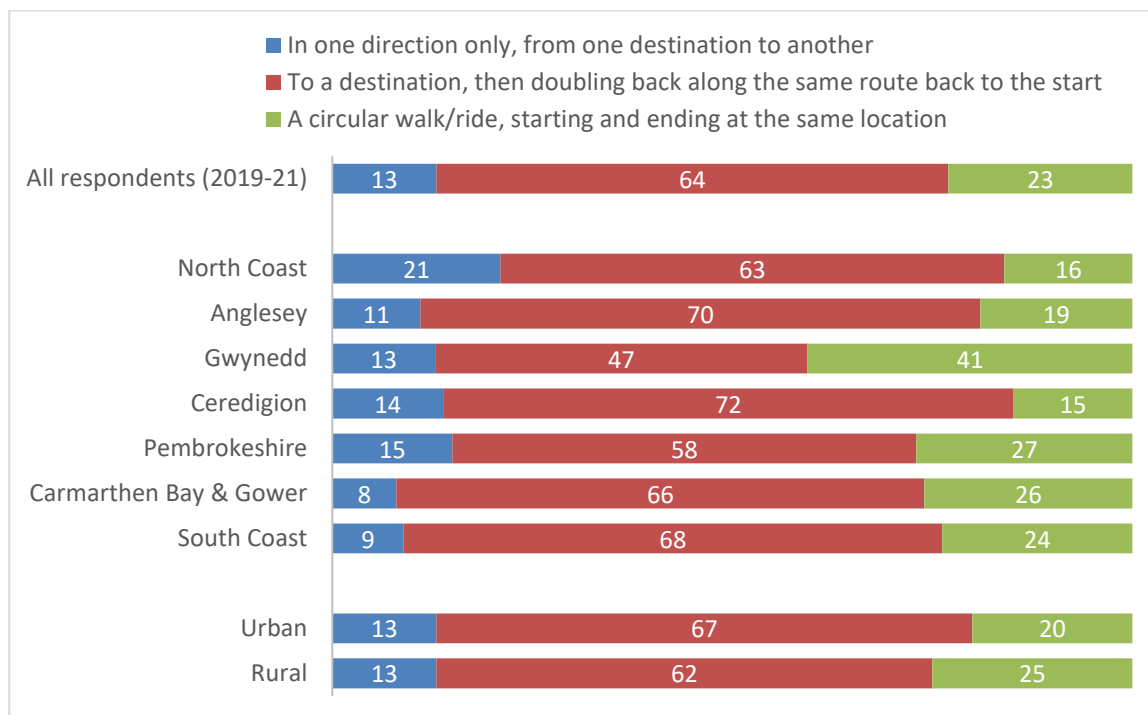
Older people (aged 65+) and those with children were more likely to travel shorter distances - 64% of those aged 65+ travelled less than two miles along the Coast Path, as did 67% of those with children.

Type of walk – one direction/doubling back/circular

When asked if their walk was going to be; a) in one direction only, from one destination to another; b) to a destination then doubling back along the same route back to the start; or c) a circular walk/ride, starting and ending at the same location, the majority (almost two thirds 64%), were going to be going doubling back along the same route back to the start. This was most likely to be the case for users of the Coast Path in Ceredigion (72%).

Almost a quarter (23%) were intending to go on a circular walk/ride (most commonly the case for those in Gwynedd – 41%), and just 13% intended to travel in one direction only (from one destination to another), which was most likely to be the case for those on the North Coast (21%).

Figure 26 – Type of walk – by region and rurality (%)



Number of respondents (excluding 'don't know'/'not answered' – 34 respondents, 2%): All 2019-21 (1,485), North Coast (295), Anglesey (203), Gwynedd (167), Ceredigion (137), Pembrokeshire (154), Carmarthen Bay & Gower (206), South Coast (323), urban (552), rural (923).

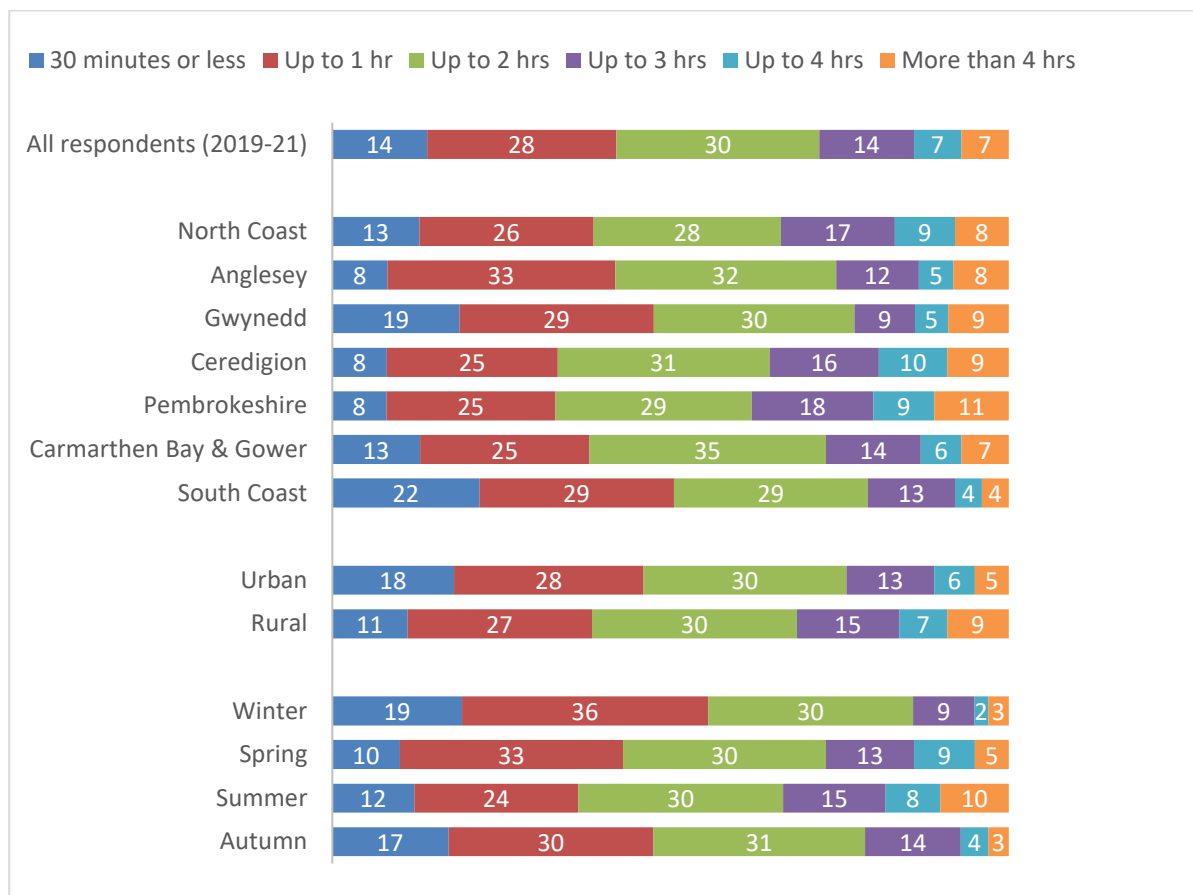
Time spent travelling along Wales Coast Path

The survey also established the amount of time Coast Path users intended to be on the path on the day they were interviewed.

The average amount of time spent on the Coast Path was almost two hours (1 hour 56 minutes), which varied from an average of 2 hours, 15 minutes among those interviewed in Pembrokeshire (and a near identical average of 2 hours, 14 minutes among those in Ceredigion), to shorter average usage time of 1 hour and 36 minutes among those on the South Coast section of the Coast Path. Indeed, for one in five (22%) of those using the Wales Coast Path in this latter region, the time they expected to spend on the path was very short (30 minutes or less).

Seasonality also influenced the amount of time spent travelling along the Coast Path. As might be expected, those using the Coast Path in winter months averaged the shortest amount of time on the Coast Path (averaging 1hr 29 mins), while in the summer the average amount of time on the Coast Path increased considerably to 2hrs 11 minutes.

Figure 27 – Time spent travelling along Wales Coast Path – by region and rurality (%)



Number of respondents (excluding 'refused'/'not answered' – 11 respondents, 1%): All 2019-21 (1,508), North Coast (303), Anglesey (204), Gwynedd (167), Ceredigion (143), Pembrokeshire (156), Carmarthen Bay & Gower (205), South Coast (330), urban (567), rural (941).

Spend – whilst on the Wales Coast Path and on accommodation

Respondents were asked how much they and their immediate party expected to spend within 10 miles of the coast on their entire trip (excluding accommodation) and, of this amount, how much they expected to spend during their walk/ride (including at the start and end points). In addition, those staying in paid accommodation were asked how much they and their immediate group spent on accommodation per night.

Figure 28a overleaf details the spend of the immediate group, while figure 28b details spend per person.

Average total group spend (excluding accommodation) within 10 miles of the Coast Path was £19 (or £9 per person). Staying visitors expected to spend considerably more than day visitors – an average of £33 compared with £10 for day visitors. Reflecting this, those in areas most likely to attract staying visitors recorded the highest levels of average spend – all in excess of £20 (see figure 15a overleaf), while those using the North Coast, Carmarthen Bay and Gower and South Coast sections of the Coast Path were expecting

to spend £15 or less on average. Average spend was also higher on rural sections of the Path (£22), than in urban areas (£14).

Those from higher socio-economic grades (ABC1), were also likely to be spending a greater amount (£21), than their C2DE counterparts (£15).

Of the average of £19 expected to be spent within 10 miles of the Coast Path, half of this (£10) was expected to be spent whilst on the path itself (including start and end points).

Average accommodation spend per night (among those staying in paid accommodation) was £77 (or £37 per person). As was the case with spend excluding accommodation, those from higher socio-economic grades (ABC1) tended to spend more on accommodation – spending an average of £82 per night, in comparison with £61 per night among those from C2DE social grades.

Accommodation spend tended to be slightly higher among those on sections of the Coast Path in Anglesey (£86) and the North Coast (£84), and lower among those on Carmarthen Bay & Gower sections (£64) and the South Coast (£51).

Figure 28a – Average daily group spend – by region and rurality (%)

	All	North Coast	Anglesey	Gwynedd	Ceredigion	Pembrokeshire	Carmarthen Bay & Gower	South Coast	Urban	Rural
Total daily spend (within approx. 10 miles of the coast, ex. accommodation) ⁵	£19	£15	£30	£27	£30	£21	£14	£10	£14	£22
Amount of daily total spent during walk/ride ⁶	£10	£6	£18	£11	£15	£12	£9	£6	£7	£12
Number of respondents:	1519	306	208	168	143	156	207	331	570	949
Accommodation (average spend per night, per group staying in paid accommodation)	£77	£84	£86	£64	£80	£81	£64	£51	£79	£76
No. of respondents (staying in paid accommodation, ex. 'don't know'):	385	48*	97*	59*	56*	66*	43*	16*	65*	320

*Care should be taken when interpreting data based on a small number of respondents.

⁵ Immediate group spend within approximately 10 miles of the coast on entire trip that day (i.e. between departing from and returning to home or other accommodation – not just whilst using the Coast Path)

⁶ Amount of total spend during walk / ride, including at start and end points. This includes all spend on circular walks and on diversions away from the Coast Path (e.g. to access facilities in adjacent or nearby settlements).

Figure 28b – Average daily spend per person – by region and rurality (%)

	All	North Coast	Anglesey	Gwynedd	Ceredigion	Pembrokeshire	Carmarthen Bay & Gower	South Coast	Urban	Rural
Total daily spend (within approx. 10 miles of the coast, ex. accommodation) ⁷	£9	£8	£13	£12	£14	£10	£8	£6	£7	£10
Amount of daily total spent during walk/ride ⁸	£5	£3	£8	£5	£7	£6	£5	£4	£4	£6
<i>Number of respondents:</i>	1519	306	208	168	143	156	207	331	570	949
Accommodation (average spend per night, per group staying in paid accommodation)	£37	£46	£36	£26	£37	£43	£37	£31	£43	£36
<i>No. of respondents (staying in paid accommodation, ex. 'don't know'):</i>	385	48*	97*	59*	56*	66*	43*	16*	65*	320

*Care should be taken when interpreting data based on a small number of respondents.

Satisfaction with aspects of the Wales Coast Path

Coast path users were asked to what extent they agreed or disagreed with several statements relating to: enjoyment, rating of the Coast Path furniture, surface and signage, its contribution to their appreciation of Welsh culture, and information availability. See figure 29 and 30 for a regional breakdown.

Encouragingly, almost all (97%), agreed (either strongly or slightly) that they had enjoyed using the path on the day of their visit, with the vast majority of these (almost nine in ten, 88%) agreeing strongly that they had enjoyed using the path. Enjoyment was consistently high across users of all sections of the Coast Path (see figure 30).

Furthermore, the vast majority (almost nine in ten, 88%) of Wales Coast Path users agreed that using the path had contributed to their appreciation of Wales and its culture. This was particularly likely to be the case for those using sections of the Coast Path in Pembrokeshire (96%), but slightly less so for those in Carmarthen Bay & Gower (83%).

⁷ Immediate group spend within approximately 10 miles of the coast on entire trip that day (i.e. between departing from and returning to home or other accommodation – not just whilst using the Coast Path)

⁸ Amount of total spend during walk / ride, including at start and end points. This includes all spend on circular walks and on diversions away from the Coast Path (e.g. to access facilities in adjacent or nearby settlements).

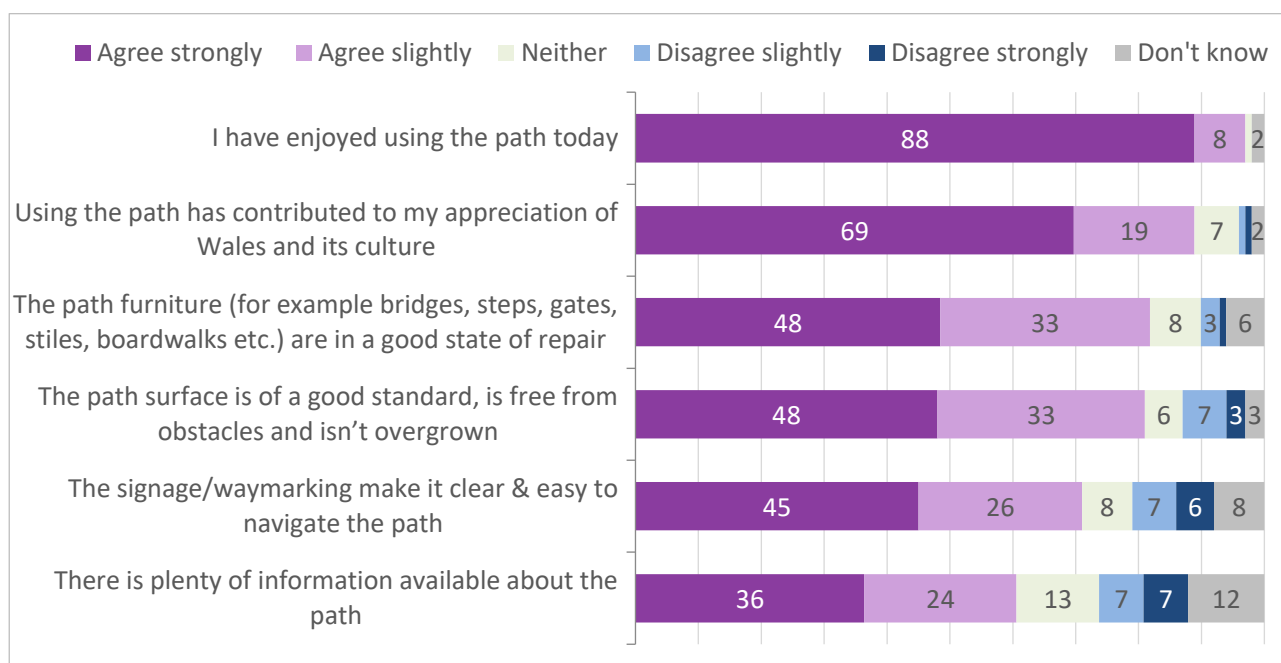
The path furniture and surface were also generally likely to be considered in a positive light – Eight in ten (81%) agreed that the furniture was in a good state of repair and the same proportion agreed the path surface was of a good standard, free from obstacles and not overgrown. However strong agreement that this was the case, was somewhat lower - Slightly fewer than half (49%) agreed strongly that the furniture and path were in a good state of repair/of a good standard. Those least likely to agree that the path surface was of a good standard were on the Ceredigion section of the Coast Path (71% agreeing, compared with 81% overall).

Dissatisfaction with this statement also appeared to be seasonal; those interviewed between July and September (when paths are most likely to become overgrown) were the most likely to disagree with this statement (17% doing so during these months). The path surface was also more of a concern for daily users of the Coast Path (21% of daily users disagreed that the path surface was of a good standard).

Seven in ten (71%) of Coast Path users agreed that the signage / waymarking made it clear and easy to navigate the path, and this was particularly likely to be the case among users on the North Coast and Anglesey sections of the Coast Path (81% and 79% of those on these sections agreeing respectively). However, more than one in ten (13%) disagreed, which was particularly likely to be the case on the South Coast, where almost three in ten (28%) disagreed that the signage / waymarking made it clear and easy to navigate the path.

Although most Coast Path users (60%) agreed that plenty of information was available about the path, this was the aspect users were least likely to be in strong agreement with (36%), and more than one in ten (14%) disagreed that plenty of information was available. Those least likely to agree were on the South Coast section of the Coast Path (where just 39% agreed plenty of information was available) and Carmarthen Bay & Gower (51%).

Figure 29 – Perceptions – extent agree/disagree with statements (%)



Number of respondents (all): 1,519

Figure 30 – Perceptions – proportion agree (strongly or lightly) with statements – by Coast Path region (%)

	All	Wales Coast Path region						
		North Coast	Anglesey	Gwynedd	Ceredigion	Pembrokeshire	Carmarthen Bay & Gower	South Coast
I have enjoyed using the path today	97	98	94	96	97	97	94	98
Using the path has contributed to my appreciation of Wales and its culture	88	92	89	90	84	96	83	85
The path furniture (for example bridges, steps, gates, stiles, boardwalks etc.) are in a good state of repair	82	92	82	82	80	85	74	75
The path surface is of a good standard, is free from obstacles and isn't overgrown	81	84	85	92	71	79	78	77
The signage/waymarking make it clear & easy to navigate the path	71	81	79	76	76	73	68	53
There is plenty of information available about the path	60	76	68	68	56	68	51	39
<i>Number of respondents (all):</i>	1519	306	208	168	143	156	207	331

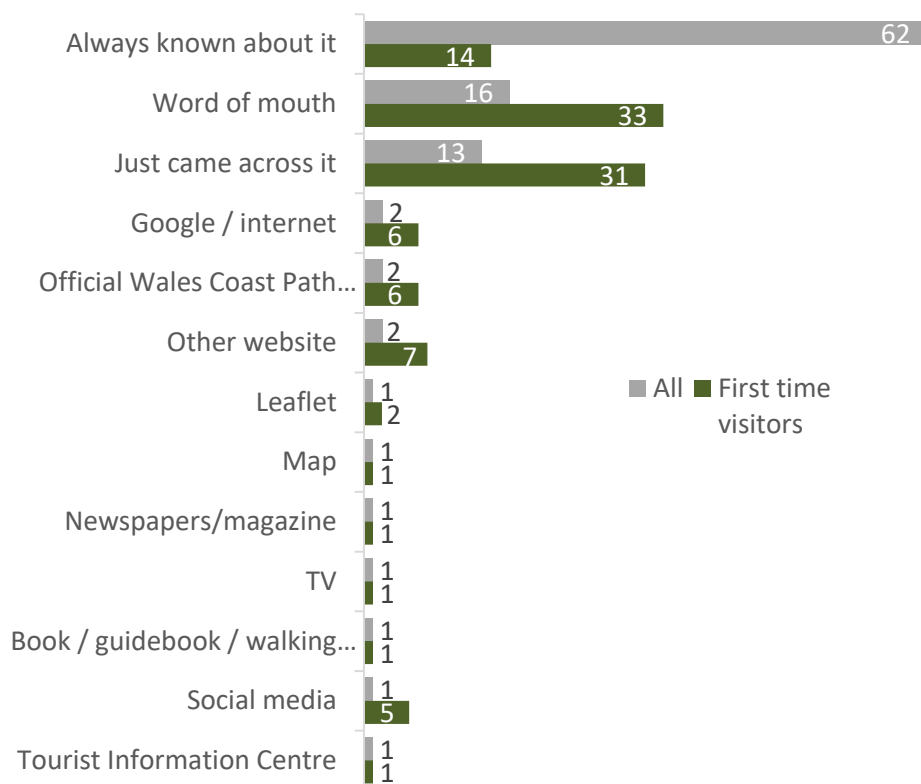
Information sources

How found out about the Coast Path

When asked how they had found out about the Path they were using, most users said they had either always known about it (62%) or found out through word of mouth (16%). More than one in ten (13%) had just happened to come across the Path. Other individual sources were mentioned by relatively few (less than 2% of users) – see figure 31.

Among first time visitors, a third (33%) had found out about the Coast Path via word of mouth and a similar proportion (31%) had just come across it. However, the internet and social media were the other main sources of awareness – 6% of first time visitors (more than one in twenty) had found out about it via the official Wales Coast Path Website, 7% via another website, 6% mentioned Google / the internet generally, and 5% had found out about the Coast Path through social media.

Figure 31 – How found out about the Coast Path (main mentions, %)



Number of respondents (all): 1,519

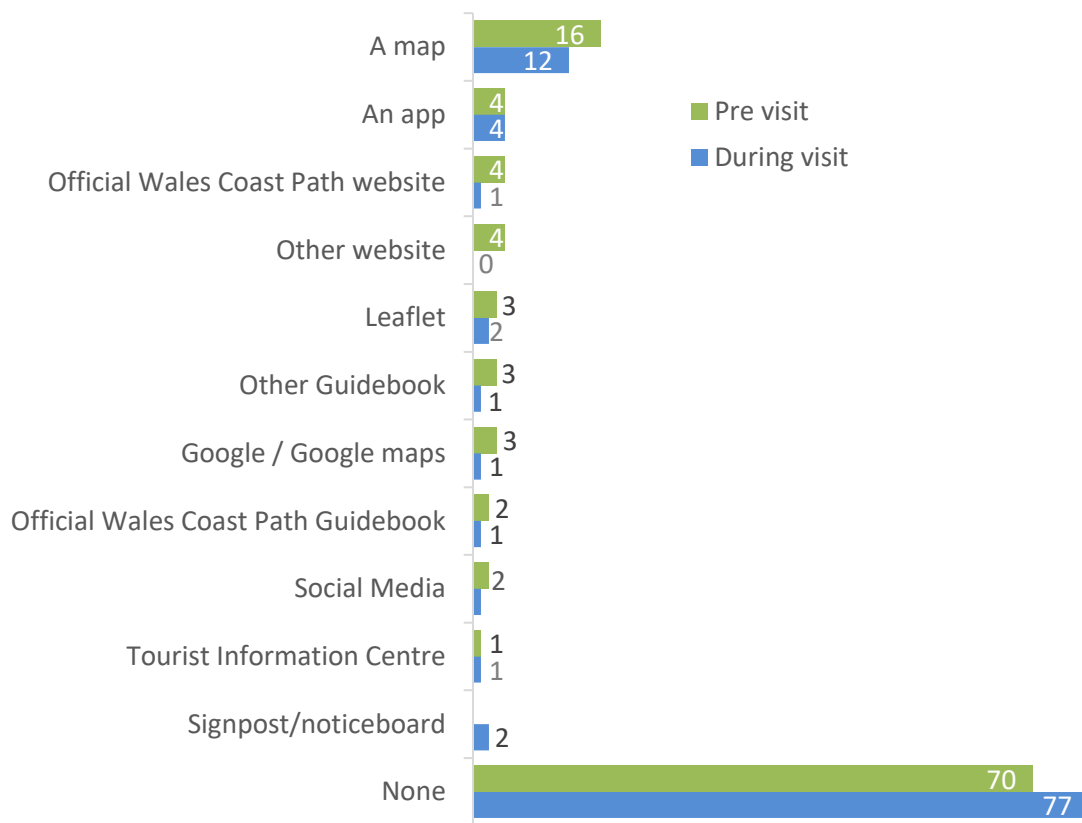
Sources of information pre and during visit

When asked about information sources used both before visiting and while on the Coast Path (see figure 32), just three in ten of all users (30%) had referred to any information sources prior to visiting, and fewer (23%) had done so whilst on the path. However, a significantly larger proportion of first time visitors were likely to be referring to information sources both prior to visiting (62%) and while on the Coast Path (45%).

The information source most likely to be used was a map – both pre-visit and while on the Coast Path (16% and 12% used a map pre/during their visit respectively, which increased to 27% / 21% among first time visitors).

Digital information sources including apps, the official Wales Coast Path Website, other websites, Google / Google Maps and social media were each used by between 4% and 2% of Coast Path users prior to their visit, while similar proportions accessed ‘traditional’ information sources such as leaflets (3%), the official Wales Coast Path guidebook (2%), other guidebooks (3%) and Tourist Information Centres (1%) prior to visiting.

Figure 32 – Information sources (pre and during visit, %)



Number of respondents (all): 1,519

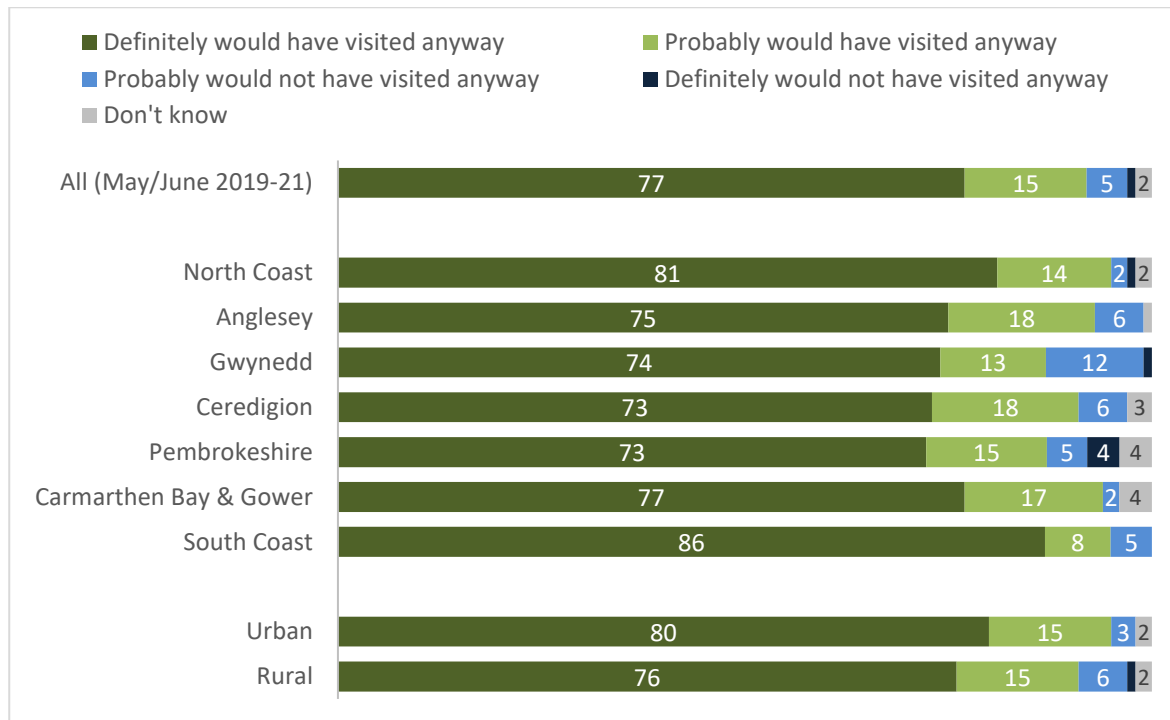
The impact of Covid-19

Following a break in survey interviewing due to the Covid-19 pandemic, two additional survey questions were included when the survey re-commenced from May to June 2021. The questions aimed to establish whether users were likely to have been visiting/using the path were it not for the Covid-19 pandemic, and the extent to which they felt safe using the Path at that time.

Likelihood of visiting/using the path were it not for Covid-19 pandemic

Although more than three quarters (77%) said they ‘definitely’ would have visited anyway, 15% weren’t as certain, saying they ‘probably’ would have done so. One in twenty (6%) said they either ‘probably’ or ‘definitely’ would not have been using the Coast Path on that day had it not been for the Covid-19 pandemic. Among first time visitors (who were predominantly from England), almost one in five (18%), said they ‘probably’ would not have visited, and just three fifths (58%) said they ‘definitely’ would have done so.

Figure 33 – Likelihood of visiting the coast path if it weren't for Covid-19 pandemic (% of Coast Path users in May/June 2021) – by region and rurality (%)



Number of respondents (all interviewed in May / June 2021): All (582), North Coast (169), Anglesey (105), Gwynedd (85*), Ceredigion (78*), Pembrokeshire (55*), Carmarthen Bay & Gower (53*), South Coast (37*), urban (163), rural (419).

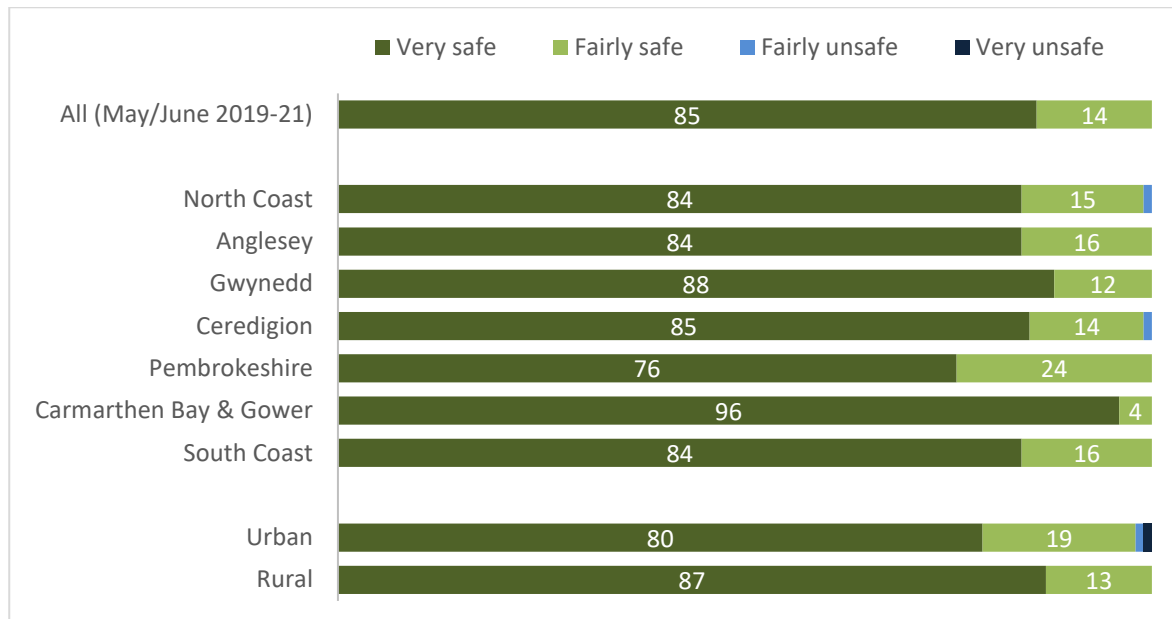
*Care should be taken when interpreting data based on a small number of respondents.

Feeling of safety in relation to Covid-19

Turning to feelings of safety in terms of the risk of Covid, users appeared comfortable on the Wales Coast Path overall. More than four fifths (85%) said they felt 'very' safe on the Wales Coast Path on the day they were interviewed. Of the remainder 14% felt 'fairly' safe, and just 1% said they felt either fairly or very unsafe.

Users of urban sections of the Wales Coast Path were slightly less likely to feel very safe (80%), than those using rural parts of the Coast Path (87%). Those in groups containing individual(s) with a long-term limiting health problem or disability were also somewhat less likely to feel very safe (76%), however just 1% reported feeling (fairly) unsafe.

Figure 34 – Feeling of safety (in terms of the risk of Covid) (% of Coast Path users in May/June 2021) – by region and rurality (%)



Number of respondents (all interviewed in May / June 2021): All (582), North Coast (169), Anglesey (105), Gwynedd (85*), Ceredigion (78*), Pembrokeshire (55*), Carmarthen Bay & Gower (53*), South Coast (37*), urban (163), rural (419).

*Care should be taken when interpreting data based on a small number of respondents.

Appendix – Survey Questionnaire

S1. Do you speak Welsh

1. Yes – fluently
2. Yes – but not fluently
3. No

If yes at S1

S2. Would you like to complete this interview in English or Welsh?

1. English
2. Welsh

Q1. What is your main mode of transport on this path today?

1. Walking
2. Cycling
3. Horse Riding
4. Using a motorised vehicle (e.g. motorbike, quad bike)
5. Using an assisted/disability vehicle
6. Other

Q2. Do you know the name of the long distance path you are on today? Does it have any other names?

Write in.

Don't know

Q3. Which of these best describes the purpose of your day out today?

1. Mainly to walk/ride along the coast
2. Walking/riding along the coast was one of the reasons
3. I hadn't specifically planned to walk/ride along the coast
4. Don't know

Q4. Approximately how far along the coast path will you be walking/riding today, between the start point on the path and the furthest point from that start point on the path? Note this is not the total miles walked today – it is the total miles along the stretch of the coast path in one direction.

1. Up to 2 miles
2. 2 to 5 miles
3. 6 to 10 miles
4. More than 10 miles
5. Don't know

Q5. And will your walk/ride be...?

1. In one direction only, from one destination to another
2. To a destination, then doubling back along the same route back to the start
3. A circular walk/ride, starting and ending at the same location

Q6. Approximately how long will you be on the coast path today?

Hours:

Minutes:

Q7. Which, if any, of these reasons describe why you came to the coast path today?

Please select all that apply

1. To spend time with family
2. To spend time with friends
3. To spend time alone
4. To learn something about the outdoors
5. For fresh air or to enjoy pleasant weather
6. For health or exercise
7. For peace and quiet
8. To relax and unwind
9. To exercise your dog
10. To enjoy scenery/views
11. To see wildlife/birds

12. The history of the area
13. To entertain children
14. To challenge myself
15. To enjoy/participate in my hobby
16. For the food & drink
17. To get somewhere (e.g. walking to work/shops)
18. None of these
19. Don't know

Q8. Who are you with on the coast path today? Please select all that apply

1. Alone (go to Q10)
2. With spouse/partner
3. With family – with children
4. With family – without children
5. With friends
6. With organised group
7. Other

(for answers to 2-7 please go to questions 9a and b)

Q9a. How many adults and children are in your entire group for walking/cycling/riding along the path today. Entire group = total number (e.g. several families on walk together, large walking group/club etc)

Total No of adults (aged 16+):

Total no of children (aged 15 or younger):

Q9b. And how many adults and children are in your immediate group for walking/cycling/riding along the path today? Immediate group = those within the same group that share financial responsibility (e.g. a single family, couple). In the majority of cases this will be the same as the entire group.

No of adults in immediate group (aged 16+):

No children in immediate group (aged 15 or younger):

Q10a. Ask All. Excluding accommodation, how much do you and your immediate group expect to spend within approximately 10 miles of the coast on your entire trip today (i.e. between departing from and returning to home or other accommodation - not

just whilst actually using the Coast Path in this area)? If unsure, please provide your best estimate. If nothing enter 0.

Enter amount in pounds £

Don't know

Refused

Q10b. Of this amount, how much do you and your immediate group expect to spend during your walk or ride, including at the start and end points? This includes all spend on circular walks and on diversions away from the Coast Path (e.g. to access facilities in adjacent or nearby settlements). If unsure, please provide your best estimate. If nothing enter 0.

Enter amount in pounds £

Don't know:

Refused:

Q11. Does your visit to the coastal path involve you staying overnight in Wales away from home?

1. Yes - go to Q12
2. No - go to Q15
3. Don't know – go to Q15

Ask if yes at Q11

Q12a How many nights will you be staying in Wales? This could be across multiple locations (in Wales)

Enter number of nights:

Don't know

Q12b. How many separate days will you be using the coastal path during your stay in Wales, including today?

Enter number of days:

Don't know

Ask if using coast path for two or more days at Q12b

Q13. Which of these best describes your use of the coast path during your stay in Wales?

1. Walking the whole Wales Coast Path in one trip
2. Walking the whole Wales Coast Path over several separate trips

3. A journey along one continuous section of the coast path over several days
4. I will visit completely separate sections of the coast path on different days of my stay in Wales
5. I will use the same section of coast path several times during my stay

Ask if yes at Q11

Q14a. In what type of accommodation will you be staying in Wales? Please select all that apply

1. Hotel
2. B&B or Guesthouse
3. Farmhouse
4. Caravan (touring / campervan / motorhome)
5. In rented static caravan
6. In own static caravan
7. Camping
8. Self-Catering in rented house, villa, cottage, apartment or flat
9. Serviced apartment
10. Someone else's home on a commercial basis
11. Holiday camp/village
12. Hostel or bunkhouse
13. Alternative accommodation, e.g. Yurt, Tee-Pee, Tree House, Hut, Ecopod etc.
14. Boat
15. Cruise ship
16. University accommodation
17. Friend's / relative's home
18. Own second home / time share
19. Other

Ask if staying in paid accommodation at Q14a

Q14b. Approximately how much did you and your immediate group spend on accommodation last night? If this is your first night away, please enter spend for tonight.

Please enter the cost for a single night for your immediate group in pounds £

Don't know

Ask all

Q15. From where you stayed last night (i.e. from home or the accommodation where you are staying), how far did you travel to reach the coast path today?

Please give an approximation if unsure.

1. 5 miles or less
2. 6 to 10 miles
3. 11 to 25 miles
4. 26 to 50 miles
5. More than 50 miles
6. Don't know

Q16. What primary mode(s) of transport did you use to reach the coast path today?

Please select all that apply.

1. Private car or van
2. Hired car or van
3. Train
4. Public bus or coach
5. Private bus/coach excursion/tour
6. Bike
7. Motorbike
8. On foot/walking
9. Taxi
10. Water taxi or bus
11. Boat or yacht
12. Campervan or tourer
13. Ferry – car passenger

14. Ferry – foot passenger

15. Other

Q17. Which of the following best describes how often you use the coast path in Wales?

1. Daily

2. Weekly

3. At least once a month

4. At least once a year

5. Hardly ever

6. This is the first time

Q18. Thinking about you and anyone in your immediate group on the coast path today, is there anyone whose day to day activities are limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months? (Including problems related to old age)

1. Yes – limited a lot

2. Yes – limited a little

3. No

Q19. How did you find out about this coast path?

1. Always known about it

2. Just came across it

3. Leaflet

4. Newspapers/magazine

5. Official Wales Coast Path website - www.walescoastpath.gov.uk

6. Other website (please specify)

7. Radio

8. Social media

9. TV (please specify programme)

10. Tourist Information Centre

11. Word of mouth

12. Other (please specify)

13. Don't know

Q20. What information sources did you refer to before your visit to the coast path? Please select all that apply.

Q21. What information source are you referring to whilst on the coast path? Please select all that apply.

	Before visit	Whilst on path
A map	1	1
Leaflet	2	2
Official Wales Coast Path guidebook	3	3
Official Wales Coast Path website – www.walescoastpath.gov.uk	4	4
Other guidebook	5	5
Other website (please specify)	6	6
An app	7	7
Social media	8	8
Tourist information centre	9	9
Other (please specify)		
None	N	N

Q22. To what extent do you agree or disagree with the following statements about the path you are on today?

	Agree strongly	Agree slightly	Neither agree nor disagree	Disagree slightly	Disagree strongly	<i>Don't know</i>
The signage/waymarking make it clear & easy to navigate the path	1	2	3	4	5	6

The path furniture (for example bridges, steps, gates, stiles, boardwalks etc.) are in a good state of repair	1	2	3	4	5	6
The path surface is of a good standard, is free from obstacles and isn't overgrown	1	2	3	4	5	6
There is plenty of information available about the path	1	2	3	4	5	6
Using the path has contributed to my appreciation of Wales and it's culture	1	2	3	4	5	6
I have enjoyed using the path today	1	2	3	4	5	6

Q23. Would you have visited the coast path today if it weren't for the Covid-19 pandemic?

1. Definitely would have visited anyway
2. Probably would have visited anyway
3. Probably would not have visited
4. Definitely would not have visited
5. Don't know

Q24. How safe, in terms of the risk of covid, do you feel today on the Wales Coast Path?

1. Very safe
2. Fairly safe
3. Fairly unsafe
4. Very unsafe

Finally, some questions to help with our analysis.

Q25. What is your gender?

1. Male
2. Female
3. Other
4. Prefer not to say

Q26. What is your age?

Q27. What is your working status?

1. Working full time (30+ hrs per week)
2. Working part time (up to 29 hrs per week)
3. Full time education
4. Retired
5. Not working
6. Other

Q28. What is the occupation of the Chief Income earner in your household? (The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source). If chief income earner is retired or registered unemployed, please give previous occupation

Job:

Position / grade:

Q29. What is your ethnic group?

- White:
 - White British
 - White Welsh
 - Other white
- Mixed
 - White and Black Caribbean
 - White and Black African
 - White and Asian
 - Other mixed
- Asian or Asian British
 - Indian
 - Pakistani
 - Bangladeshi
 - Other Asian

Black or Black British

- Caribbean
- African
- Other black

Chinese or other

- Chinese
- Other

Q30. Is the weather today mainly...?

1. Sunny
2. Cloudy
3. Showers
4. Rain
5. Windy

Name & address

Name, addresses and telephone numbers are collected so that Head Office staff can establish the interview actually took place in the appropriate manner. Personal details are not used for any other purpose and are not passed on to anyone else. Postcode is used for geographic analysis purposes only, without identifying individuals who have taken part in the survey.

IF UNWILLING TO PROVIDE FULL POSTCODE, ASK FOR FIRST 4 DIGITS (FOR REGIONAL ANALYSIS)

- Respondent name
- Address
- County (Country if outside UK)
- Postcode