

## REPORT OF ACCESS & RIGHTS OF WAY MANAGER

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### **SUBJECT: COUNTRY PATH USER SURVEY 2015-16**

#### Purpose of Report

To inform members of the results of the country path user survey and how this information will be used to guide the future development and management of the Coast Path and public rights of way in the National Park.

#### Background

In addition to the Pembrokeshire Coast Path, there is a large network of public rights of way in the National Park, which is maintained by the Authority. The Coast Path is made up of 260km of public rights of way and the additional network of public rights of way accounts for 854km (1,356 individual routes). At present 90% of the total network is accessible to the public and managed by the National Park Authority.

The network of public rights of way is the prime means by which visitors can explore and enjoy the coast and countryside of the National Park and accounts for a significant annual expenditure in terms of its upkeep. Periodically therefore, there is a need to determine the views of the many residents and visitors who walk public rights of way in the National Park, who are effectively the service users. The main purpose of the survey was therefore to determine who walks in the National Park and how often; why they use public rights of way; how they rate the general condition of the path network and what can be done to improve the walking experience and encourage more people to gain access to the coast and countryside.

#### Methodology

The survey ran continuously from August 2015 to July 2016. A self-completion survey was conducted at twelve locations across the National Park and achieved a very satisfactory sample of 2,959 completed questionnaires. The questionnaire form is attached as an appendix to this report. Seven survey stations were located on the Coast Path and five on the inland network of public rights of way, often in comparatively remote locations. The survey stations were selected to ensure that they were close to a concealed digital path user counter. This enables a sample of respondents relative to total footfall to be recorded.

The survey locations were Rosebush, Nevern, Cwm Gwaun, Cwm yr Eglwys, Garn Fechan, Abereddy, Newgale, Broad Haven, Canaston Wood, Angle, St Govans Head & Saundersfoot. At each location a 'post box' was installed to allow walkers to fill in a questionnaire forms and 'post' them into a locked compartment. A copy of the questionnaire form is attached to this report. The completed forms were collected on a regular basis by staff and voluntary wardens and replenished with new forms, pens and pencils. The completed forms were sent in batches to a consultant who was responsible for the data collation and analysis over the course of the twelve months.

## Summary of Results

A summary of the results are provided below (a commentary is provided in italics):

- Origin of walkers: 26% of respondents were residents of the county, 66% staying visitors, 8% day visitors. *While public rights of way are clearly important to the tourist industry, a significant proportion of residents are also using the network.*
- Frequency of walking: 43% of residents are walking at least once a week; there was also a high usage of paths by visitors with 51% walking every day of their stay.  
*The high frequency of walking by residents is noted, and demonstrates how public rights of way can contribute to the health and well-being of local communities. It also confirms the fact that leisure walking is by far the dominant activity of visitors, as noted by other surveys.*
- By far the main reason for walking was to enjoy the natural landscape and to see wildlife.  
*The proactive management of public rights of way by the Authority clearly accords with National Parks' second purpose and several Corporate Objectives.*
- The average distance of a walk was 7.3 miles and the average duration of a walk was 3.5 hours.  
*The average distance/duration was longer than expected, suggesting that there is trend for longer walks, possibly accounted for by improved coastal bus services. Promoted routes therefore need to be reviewed to ensure we meet this demand.*
- There were very high levels of satisfaction in relation to the condition of paths in terms of surface, verges, signage, gates and stiles, with 95% of respondents rating the condition as excellent and good. Also 98.5% of respondents confirmed that their walk had met their expectations.  
*The high level of satisfaction with the condition of paths is very encouraging and justifies the Authority's sustained commitment to the maintenance and improvement of the Coast Path and public path network. It also demonstrates the importance of a well maintained public rights of way network to the tourism economy and overall visitor experience.*
- In terms of planning a walk, people relied less on websites and mobile apps and more on local knowledge, signage, printed guides and Ordnance Survey maps. Ordnance Survey maps were rated as the most popular way of planning a walk.  
*Traditional means of planning a walk are therefore still popular.*
- In terms of what can be done to encourage people to walk more often, the majority of respondents felt that the National Park Authority should be providing more distance & destination signage, more printed walks guides and more publicity of the existing access opportunities.  
*Together with a need to ensure that its maintenance commitment is sustained, these results provide clear guidance as to where the Authority needs to concentrate its resources in terms of improvements.*

- 68% of walkers were over the age of 45 years and the majority of walkers were walking either alone or in pairs.  
*Further work will be undertaken to determine if this correlates with Pembrokeshire County Council's visitor survey in terms of age group.*
- Weather conditions: 82% recorded dry conditions. 72% forms filled in during the five months May to September. Seasonality is evident with less questionnaire forms collected in winter months and borne out by the adjacent path user counters.  
*The prolonged wet weather over November/December 2015 appears to have influenced the low level of responses received. This was unfortunate, especially as an increase in feedback was expected over the Christmas holidays. Wet weather can discourage leisure walking and would certainly discourage walkers from pausing to fill out a questionnaire form.*
- A total of 2,959 completed questionnaire forms were collected and there was a total of 6,330 walkers accounted for by the survey (respondents were asked to record the numbers of people present in their group). The 12 adjacent path user counters accounted for a total of 168,770 walkers during the survey period, so the survey sample was 3.7% of footfall.  
*This is therefore a robust sample on which to review and plan work, when it is considered that the sample for the 2016 Wales Outdoor Recreation Survey is 6,000.*

When the report is prepared, the results of the path counters will be incorporated to help to determine the sample size at each location. The data will also be disaggregated to provide information specific to the Coast Path to determine if there any difference in the trends between the Coast Path and wider network of public rights of way. Comparisons will also be drawn with a similar path user survey conducted by the Park Authority in 2005. The anecdotes received on the forms in particular make interesting reading and a sample that are typical of the feedback will be included in the report.

### Comparisons

The National Park Authority has undertaken a number of similar surveys in the past notably the Coast Path User Survey 1996/97 and the Country Paths Survey 2005. Comparisons between the 2005 and 2015/16 survey show that satisfaction levels remain high with regard to the condition of paths; the proportion of residents using public rights of way has remained the same, while the use of the internet to find route information has shown an increase.

### Options

Other forms of data collection and survey techniques were considered such as telephone, postal and online surveys, however, the objective was to "interview" walkers while they were actually using the paths to gain their immediate impressions. The post box survey station is a tried and tested technique and an efficient method of data capture over the 12 months that could be absorbed into the existing work of staff with the assistance of volunteers. Face to face interviews would have been more costly to organise given the numbers of dedicated personnel required.

### Financial considerations

The costs of making the post boxes, translating and printing the survey forms and collating and analysing the data came to £4,860.00 and were paid for by the Rights of Way Improvement Plan funding programme, a 100% grant provided by the Welsh Government specifically for the improvements of public rights of way.

### Risk considerations

No issues.

### Compliance

The survey results form a sound evidence base for the future management and promotion of countryside access opportunities in accord with Corporate Objectives. The feedback also helps to inform the preparation of the second Pembrokeshire Rights of Way Improvement Plan (ROWIP) which is currently in preparation.

### Human Rights/Equality issues

No issues.

### Biodiversity implications/Sustainability appraisal

No issues.

### Welsh Language statement

Questionnaire forms were printed in Welsh and English.

### Conclusion

The work of the National Park Authority in managing the Coast Path and public rights of way is clearly valued by the public. At the least there is a need to maintain the level of this commitment and ideally, achieve continuous improvement. The survey gives an insight into the concerns and needs of walkers and helps to guide the Authority in its work to improve the walking experience in the National Park. The survey will also help inform the strategic direction of public rights of way management as well as the marketing and promotion of countryside access opportunities in the National Park.

### Recommendation

That Members note the results of the survey.

### Background Documents

- Country Path User Survey 2015/16 Data

*(For further information, please contact Anthony Richards, Access & Rights of Way Manager extn 4849)*

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## PART B: COUNTRY PATHS IN THE NATIONAL PARK

**Q4** Are you a resident of Pembrokeshire or a visitor to the county? Please mark an **X** in the correct box

Resident of Pembrokeshire .....       Staying visitor .....   
 Day visitor .....

**Q5** How often have you walked country paths in the National Park in the last twelve months?  
 Please mark an **X** in either **BOX A** or **B**

**Box A: Complete this section if you are a resident or a day visitor**

More than three times a week .....   
 About once or twice a week .....   
 About once a fortnight .....   
 About once a month .....   
 Less than once a month .....   
 Less than once a year .....

**Box B: Complete this section if you are a staying visitor**

Once during stay .....   
 Two or three walks during stay .....   
 Every day during stay .....

**Q6** On average, when going for a country walk, how long do you spend walking and how far do you usually walk? Please write in the distance and duration below.

Write in either one OR both boxes

Distance in miles

Duration in hours & minutes

**Q7** Why are you walking here today? Please mark up to **THREE** boxes only

Fitness training ..... <input type="checkbox"/>	To explore the area ..... <input type="checkbox"/>
To enjoy the natural landscape ..... <input type="checkbox"/>	To improve my health ..... <input type="checkbox"/>
To 'get away from it all' ..... <input type="checkbox"/>	To see wildlife ..... <input type="checkbox"/>
To be part of a group ..... <input type="checkbox"/>	None of the above ..... <input type="checkbox"/>
To exercise the dog ..... <input type="checkbox"/>	Other ..... <input type="checkbox"/>

Other (please specify here)

**Q8** How would you rate the condition of the country paths that you have walked in the National Park for each of the following? Please mark an X only in each row

	<i>Excellent</i>	<i>Good</i>	<i>Poor</i>	<i>Very Poor</i>
<i>Control of vegetation</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Condition of gates and stiles</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Condition of path surfaces</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Provision of signposts and way-marking</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Control of dog mess</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Control of litter and rubbish</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q9** When you walk country paths in the National Park how do you plan your outing? Please mark an X in as many boxes as apply

<i>Follow signage</i> ..... <input type="checkbox"/>	<i>National Park Information Centre</i> ..... <input type="checkbox"/>	<i>Social media reviews e.g. Facebook, Trip Advisor, Twitter etc</i> ..... <input type="checkbox"/>
<i>Local knowledge</i> ..... <input type="checkbox"/>	<i>Ordnance Survey maps</i> .... <input type="checkbox"/>	<i>I do not/ have not used any information resource..</i> <input type="checkbox"/>
<i>Mobile phone/ tablet/ apps</i> ..... <input type="checkbox"/>	<i>Other websites</i> ..... <input type="checkbox"/>	<i>Other</i> ..... <input type="checkbox"/>
<i>National Park Authority website information</i> ..... <input type="checkbox"/>	<i>Paper leaflets and guide books</i> ..... <input type="checkbox"/>	
<i>Other (please specify here)</i> <input style="width: 100%; height: 20px;" type="text"/>		

**Q10** What can the National Park Authority do to encourage you to walk country paths more often? Please mark an X in as many boxes as apply

<i>Improve the condition of path surfaces</i> .....	<input type="checkbox"/>
<i>Provide walking and health information such as calorie burn/ steps taken etc</i> .....	<input type="checkbox"/>
<i>Increase the number of printed walks leaflets/ publications</i> .....	<input type="checkbox"/>
<i>Promote awareness of walking routes with more publicity and information</i> .....	<input type="checkbox"/>
<i>Provide more guided walks</i> .....	<input type="checkbox"/>
<i>Improve signage with distance and destination information</i> .....	<input type="checkbox"/>
<i>Provide more website information</i> .....	<input type="checkbox"/>
<i>Other</i> .....	<input type="checkbox"/>
<i>Other (please specify here)</i> <input style="width: 100%; height: 20px;" type="text"/>	

**Q11** Did today's walk meet your expectations? Please mark an X in the correct box

Yes .....  No .....

**Q12** Please use this box below to give us any more feedback about your answer:

**PART C: ABOUT YOU**

**Q13** Are you...? Please mark an X in the box that applies

Male.....  Female .....

**Q14** What is your age? Please mark an X in the box that applies

under 18 .....	<input type="checkbox"/>	46-55 .....	<input type="checkbox"/>
18-25 .....	<input type="checkbox"/>	56-65 .....	<input type="checkbox"/>
26-35 .....	<input type="checkbox"/>	66-75 .....	<input type="checkbox"/>
36-45 .....	<input type="checkbox"/>	76 and over.....	<input type="checkbox"/>

**Q15** Including yourself, how many:

A) Adults are walking with you today? Write number in the box

B) Children (under 18) are walking with you today? Write number in the box

**Q16** Please give your home postcode if from the UK,  
OR your home country if an overseas visitor:

Thank you for your help in completing this questionnaire. Please return it to the box provided.

**Data Protection Act 1998**

The information you provide will be treated and stored completely confidentially in accordance with the Data Protection Act. The information that you provide will be passed back to the Pembrokeshire Coast National Park Authority by the survey manager at Strategic Marketing. Strategic Marketing will retain the information for the period of the project, after which we will delete/destroy the information we hold. You can at any time ask for the information to be deleted/destroyed; and in accordance with the Data Protection Act you can at any time have access to the information you have given.

**If you would like to enter the PRIZE DRAW please give us your contact details so we can let you know if you win!**

Name:

Address:

Postcode:

Tel. no:

Email:

The prize draw will take place on 1st August 2016. The decision of Pembrokeshire Coast National Park Authority is final and no correspondence will be entered into.