

# MARKET RESEARCH & STAKEHOLDER REPORT SUMMARY

## INTRODUCTION

We have used market research to gather insight and information from our customers to understand their priorities and needs; to what extent PROW meet current demand and how they need to evolve to meet future requirements. Through the analysis of the information gathered common themes emerged, these themes were used to guide the ROWIP and Management Plans.

We set out to understand who is currently using the network, how they are using it and what is stopping those who were not. We also looked to our current and potential customers to answer the question of how the PROW network will need to evolve to meet future requirements for the residents and visitors of Kent, to provide services which are accessible to all people within the community, based on their needs and choices.

## TYPES OF INFORMATION GATHERED

We gathered information from our potential and current customers and stakeholders in four different ways; using online and stakeholder questionnaires, face to face interviews and through focus groups, as detailed below. Full reports and results from the questionnaires are included in the evidence base, Kent Resident Written Report - Lake Market Research, Online Consultation Written Report - Lake Market Research and Stakeholder Questionnaire Results, available on request.

### ONLINE

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People who used Kent's PROW network were invited, over a six-week period to complete an online questionnaire, which featured on KCC's consultation homepage, Visit Kent and the PROW web page. A total of 1,260 submissions were received and because of the self-selecting nature of the online survey, 99% were PROW users.

### FACE TO FACE

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Kent residents completed the same questionnaire used online over an 8 weeks period via a face to face interview at home. Only one person per household was interviewed, 624 in total. The residents were separated into two groups, those that had used the PROW network in the last

6 months and those that hadn't. An equal number of interviews were conducted in each of the 12 Districts/Boroughs of Kent, circa 50 in each. Within each District, residents were sampled across varying postcode sectors to ensure a good spread in terms of geography. A sample specification was set up in line with 2011 Census statistics for the Kent County Council boundary area, to ensure we interviewed a representative sample of residents in terms of gender and age. The results from this survey were used to further split the group into Kent resident PROW users and Kent resident PROW non-users groups.

## **STAKEHOLDER**

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A database of stakeholders was compiled to include all Parish, District and Borough Councils, user and interest groups. The Stakeholder questionnaire was designed to gather more detailed information about how the ROWIP links to other organisation's plans and policies, views on how the PROW network is currently used and how it needs to involve with an emphasis on provision for the partially sighted and access to woodland. We also gathered details on the PROW and Access Service itself, how our reporting system has been received and any improvements we need to make to provide a better more efficient Service.

## **FOCUS GROUPS**

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Finally, the focus groups were used as a method to gather further detailed information needed to help us deliver the priorities identified by our customers and stakeholders. We approached Canterbury City Council' Development Advisory Panel (DAP) and Kent Association for the Blind and Kent's Borough and District Planning Authorities. Although this initial contact helped us to detail the type of actions we will be delivering, ongoing consultation with such groups is required over the next 10 years to guarantee an efficient and flexible delivery of the plan.

Please note that the Kent resident user and non-user groups and the online survey group were asked the same format of questions and therefore could be directly compared. The stakeholder survey included a series of open ended questions the analysis of which stands alone although similar themes, benefits and needs were compared to the Kent resident and online survey results.

When comparing the results from the online PROW user group, the Kent resident PROW user and non-user groups and the stakeholder group we found the following:

## KNOWLEDGE OF PUBLIC RIGHTS OF WAY

Familiarity with PROW was strong in both user groups with 92% of online users and 66% of the Kent resident's users indicating that they were 'confident / have a basic knowledge / know enough about PROW in general'. The confidence level was significantly different between the Kent resident's users and non-users with 82% of users being confident about their knowledge of PROW and only 38% of non-users. The same was true for knowing how and where to find information about PROW with 75% of users being confident and only 43% of non-users. Male 'users' and 'users' aged 55 and over are more confident on most aspects when compared with females and younger respondents.

Results showed that PROW non-users were far less confident in their knowledge of PROW, increased knowledge may improve confidence and encourage use.

In the Kent resident group there was a marked difference in familiarity of PROW, with being 'confident and having a basic knowledge' being significantly lower amongst those who indicated that they were disabled. The same was observed in the level of knowledge of PROW, where those who indicated that they were disabled in the online group had less knowledge of PROW.

## ACCESSING INFORMATION

Both groups were asked if they used phone apps, maps or guides on PROW. Results showed that phone apps were the most popular for the Kent resident group (27%) and maps were the most popular for the online group (68%).

The results show that there is a correlation between increased use of PROW for specific activities and access to information, the online group having access to PROW information also had increased levels of horse riding, visiting viewpoints and attractions and geocaching.

We asked both groups what would encourage the use of the PROW network, the most common response from the Kent resident group was under the Information theme with 'knowing where routes will take me' and 'knowing where routes are' being the top two responses in this theme. The information theme was the second most common theme with the online group where the top response was 'Improving signage way marking on routes'.

The results showed that a significantly higher proportion of the younger age groups 16 – 44 used the phone apps and the older age groups 55 + used maps and guides.

The results also showed a correlation between age groups and the type of information they use. A significantly higher proportion of the online group's female users found lack of information as bigger barriers. We also found that lack of information acted as more of a barrier for the younger age groups. This was consistent with the results from the question 'What would encourage use?' where a significantly higher proportion of 16 – 34 year old users in the Kent resident group selected 'information'.

### **CURRENT USE OF PUBLIC RIGHTS OF WAY (THE NETWORK)**

Using the online survey, the public were asked to indicate the frequency in which they used each type of PROW and when they used it. Not surprisingly because of the self-selecting nature of the online survey where it is believed the majority of respondents already had an interest in PROW, a high proportion 81% use the PROW network once a week, with just over 75% using footpaths at least once a week. Kent residents indicated that they still used the PROW network on a regular basis. Overall, just over 62% use at least one type of PROW at least every six months and 35% of residents indicated that they use public footpaths at least once a week.

The results from both groups surveyed showed that there was a lower frequency of PROW use for those who indicated that they had a disability when compared to those who were not, with only 11% with a disability using the footpaths at least once a week compared to 38% of able bodied users.

### **HOW PUBLIC RIGHTS OF WAY ARE USED?**

The representative sample of the Kent resident users showed the same pattern of use when compared to the online respondents. The table below shows the percentage use for footpaths, bridleways, byways and cycle paths.

<b>Order</b>	<b>Mode of travel</b>	<b>Kent Resident's % Use</b>	<b>Online Group % Use</b>
1 <sup>st</sup>	On foot	84 %	90%
2 <sup>nd</sup>	Cycling	29 %	35%
3 <sup>rd</sup>	Driving	11 %	11%
4 <sup>th</sup>	Horse Riding	2 %	5%
5 <sup>th</sup>	Carriage driving	1 %	1%

Use of cycle path/tracks is higher amongst males (33%) compared with females (22%).

The stakeholders were also asked in their experience how the PROW network was currently used. The most popular response specifically on foot, which included walkers, dog walkers and walking groups and made up 61% of the responses. Horse riding and cycling scored low with 7% and 6% of the responses respectively.

### **WHY PUBLIC RIGHTS OF WAY ARE USED?**

The top two most popular reasons for both groups using the PROW network and cycle paths / tracks were:

- 1) To go for a walk / run / cycle / be active / healthy
  
- 2) Visiting nature / wildlife

The third most common reason differed in the representative sample and the online survey with the Kent's resident group favouring 'dog walking' as the third choice whereas the online group favoured 'visiting viewpoints and attractions'. The online group have access to such information on where to visit such places which may encourage this type of use. Dog walking was still a common reason for the online groups and was forth most popular choice.

Only 2% of the Kent resident group used horse riding as a reason to use PROW compared to 11% of the online group. Around 20% of both groups scored local shops and amenities as a reason for using PROW. Geocaching was a popular choice with 10% of the online group and only 1% of the Kent resident group. Again, the online groups choices may have been influenced by the type of information available to them i.e. where to go horse riding and where to Geocache.

Finally, both groups had similar low scores for using PROW to take children to school and getting to work, with 8% and 10% of the Kent resident group and 3% and 9% for the online group respectively.

## THOUGHTS OF PUBLIC RIGHTS OF WAY

Both groups were asked to describe their experience and how they feel when using PROW. The most common were positive feelings relating to active life styles and health and wellbeing.

<b>Feeling / Experience</b>	<b>Online Survey Group</b>	<b>Kent Resident Group</b>
<b>Happy / pleasure / fun / enjoyable</b>	37 %	28 %
<b>Energetic / healthy / active / refreshing / exercise</b>	24 %	25 %
<b>Relaxing / peaceful / quiet / calm</b>	25 %	23 %

The most common negative comment among the online group was 'under maintained' (7 %) and for Kent residents was 'overgrown, muddy' (4%).

Our research showed that the clear majority of PROW users experienced only positive feelings relating to vitality and happiness when using the network, this shows how valuable the network is in improving people's quality of life through health and wellbeing benefits.

## LIMITATIONS AND INCREASE OF USE

### LIMITATIONS

We asked both user and non-user groups what is stopping them using the PROW network daily and for leisure, 21% of the online group, 54% of the Kent resident user group and 34% of Kent resident non - user group said that nothing prevents them using PROW.

There was very little difference between the responses to daily use and leisure use of PROW when looking specifically at barriers for both user groups and non-user group. Both user groups had a higher percentage that said not enough circular routes and poor information and signs on routes and lack of confidence following a route acted as a barrier when taking leisure trips when compared to daily trips.

Overgrown vegetation was the highest percentage response for both user groups in daily and leisure use of PROW, with cleanliness / unpleasant environment scoring the next highest

response for all. Poor maintenance of paths scored the same as cleanliness / unpleasant environment for daily PROW use for the Kent resident group. As you can see from the list below poor maintenance in general acts as a significant barrier to use.

Top five barriers for PROW users for daily and leisure use:

- Difficult terrain – muddy slippery paths
- Poor maintenance of paths
- Poor maintenance of stiles and gates
- Poor maintenance of path surfaces
- Poor information signage of routes

The Kent resident PROW non-user group had a different response to the user groups with the top four barriers for daily and leisure use:

- I am not interested in walking / cycling / horse riding
- I prefer to take alternative means of transport
- I can use pavements to get me where I need to go
- I don't know where the routes will take me

There was a significant difference in the type of barrier for both daily and leisure PROW use when we looked at age sub groups for the user groups, where a higher percentage of those aged 55 + in the Kent resident group found poor maintenance of stiles/gates and surface, overgrown vegetation and difficult terrain the biggest barriers. In the non-user group, the younger age groups were not interested or take alternative means of transport.

## **ISSUES ENCOUNTERED**

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The stakeholders were asked what the main issues were they experienced on the PROW network, the top two answers were overgrown vegetation and poor maintenance. The most prominent theme was general maintenance with 47% of the responses to this question involving some aspect of maintenance to the network. Limitations of use was the next most common response which included poor links and lack of circular routes as well as paths unsuitable for the disabled, blind and shared use. Negative use was in the top three responses which included flytipping, litter, dog fouling and conflict between users.

26% of the Kent resident user group and only 2% of the online group said that they had not encountered a problem on the PROW network. The results echoed the previous results with overgrown paths, lack of signage and missing way marking, unpleasant environment, poor maintenance of stiles, gates and steps and poor surfaces being the most common responses.

## **INCREASE OF USE**

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We asked all groups what would encourage them to use the PROW network more often and for other purposes. 38% of the Kent user group, 57% of the Kent non-user group and only 4% of the online group said nothing would encourage use.

Consistent with the results of what is acting as a barrier to PROW use for both user groups, when asked what would encourage use, cutting back vegetation was the most common followed by cleanliness (removal of litter, animal fouling and graffiti) for both user groups. For the non-user groups, the top two responses were 'Knowing where the routes are' and 'Knowing where the routes will take me'.

## **REPORTING A PROBLEM ON THE PROW NETWORK**

There was a 50/50 split among the online and Kent resident groups for those that did and didn't know how to report an issue on the network. 84% of the stakeholder group knew how to report an issue. This changed significantly when we asked who had reported a problem on the network with only 17% of the Kent resident user group saying that they had, compared to 67% of the online user group.

The low percentage of Kent residents that reported an issue may be due to a lack of information available on how to report and problem on the PROW network. A significantly higher proportion of the Kent resident user group (50%) aged 55 + did know how to report a problem.

## **IMPROVEMENTS TO OUR REPORTING SYSTEM**

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We received more positive than negative responses from both user groups when asking how easy it was to report a problem on the network and how satisfied they were with the service they received.

The most common response, with 60% of the stakeholder group, said that improvements relating to customer service were needed, with an emphasis on the need for a rapid personal response with direct email from a nominated person with PROW area knowledge. There was a need to provide feedback on action taken or not taken, and it was said that KCC take too long to respond, in some cases customers have had no response at all.

The preferred methods for reporting a problem on the network can be seen in the table below.



Preferred Option	Kent Resident Group	Online Group
Top Answer	Phone (53%)	Online (80%)
Second Answer	Online (50%)	Phone App (45%)
Third Answer	Phone App (8%)	Letter (31%)
Forth Answer	Letter (1%)	Phone (21%)

## WHAT WE LEARNT FROM OUR STAKEHOLDERS

Overall the level of awareness of our previous ROWIP plans was good with 57% being aware of the plans which had influenced several strategies, policies and projects.

The stakeholders that were aware of the plans were asked how the ROWIP had influenced their organisation and how the new plan could potentially link to their organisation; the growth and development theme was the most common influence or potential link to the ROWIP with strong links to Local and Neighbourhood Plans, Transport Strategies and Green Infrastructure.

## EVOLUTION OF THE NETWORK

We asked the stakeholders if the PROW network needed to evolve to meet the future demand over the next 10 years and if so how it needed to evolve. 64% of the stakeholders said that it did with the most common response related to physical changes in the PROW network and changes needed to accommodate an increase in traffic free routes as a safe and sustainable alternative to the car. There was a need for the network to provide access to work, school and other facilities as well good circular and promoted routes for leisure and tourism.

The removal of barriers and replacing stiles with gates was the third most common response within this theme, a need that was shared as a with the online and Kent resident groups as a high priority. The maintenance of the network did not score as highly for this question with only 14% of the responses relating to maintenance issues.

The introduction of strategies and policies that will allow people to move actively and to ensure connectivity of the network through the consideration of PROW within new development and within transport plans was one of top three responses. Other responses within this theme included the need to protect, enhance, expand and integrate the PROW network. With the limited resources available it was suggested that the PROW and Access Service focuses on priority routes which are promoted or provide primary access.

## **BLIND, PARTIALLY SIGHTED AND LIMITED MOBILITY ACCESS**

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Stakeholders identified specific improvements for users with visual or mobility problems. The biggest response by far was for the need for a better physical network with no barriers, smoother all weather wide surfaced routes with tactile entrances and large, clear print signage.

## **IMPROVING THE ACCESSIBILITY TO LOCAL WOODLAND INCLUDING TO EQUESTRIANS AND CYCLISTS**

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Stakeholders identified specific improvements on how accessibility to local woodland can be improved. The highest number of responses related to a better network again and highlighted a need for separate paths for walkers, cyclists and horse riders. It was suggested that each user group would have a preferred surface type and that shared routes within woodlands would create conflict between users.

A strategic overview to identify opportunities for cyclists and equestrians including consideration of new bridleway routes and better connections to other PROW, woodland and transport hubs were highlighted. Well signed, well maintained routes with improved surfaces and no stiles were popular comments within the 'Better Maintained Network' theme

## **KEY FINDINGS – PRIORITIES AND NEEDS**

This ROWIP will use the information gathered through the market research to improve the PROW and Access Service's ways of working. We will continue to build on working partnerships with District, Borough and Parish Councils, user and interest groups and other key organisations over the next 10 years; ensuring we deliver our customer needs. The table below details the main identified needs and potential ROWIP objectives.

<b>Identified Need</b>	<b>Policy and Literature Review Evidence</b>	<b>Potential ROWIP Objectives</b>
<b>More Accessible Information / Increasing Knowledge &amp; Confidence</b>	<p>The results showed that there is a correlation between increased use of PROW for specific activities and access to information</p> <p>75% of users and only 43% of non-users were confident in</p>	<p>Using data from market research, look at different ways PROW information can be tailored to reach our customers, looking at specific groups including young and old age groups disabled and visually impaired user groups.</p> <p>Consider all types of information including online, phone apps, maps and guides to reach different</p>

	<p>finding PROW information. Male 'users' and 'users' aged 55 and over were more confident when compared with females and younger respondents.</p> <p>Results showed that PROW non-users and those that indicated they had a disability were far less confident in their knowledge of PROW, increased knowledge may improve confidence and encourage use.</p> <p>The results showed that a significantly higher proportion of the younger age groups 16 – 44 used the phone apps and the older age groups 55 + used maps and guides.</p>	<p>groups.</p> <p>Targeted improved accessibility of information to non-users to spark interest in walking / cycling and horse riding.</p> <p>Aim to reach specific groups that lacked confidence and knowledge of PROW such as those that indicated they had a disability.</p> <p>Aim to reach PROW non-users to increase knowledge and confidence to encourage use.</p>
<p><b>Better Network for Leisure and Daily Use</b></p>	<p>The results showed very low use of the network for commuting to work and getting to school, especially on weekdays. The reason for this may be lack of information on where the routes are, lack of suitable routes or poor maintenance.</p> <p>The most common barrier to use was overgrown vegetation, cleanliness (removal of litter, animal fouling and graffiti) and poor maintenance were also top answers.</p> <p>Results showed that lack of information and not knowing where routes go acted as a barrier to PROW use, more so for the younger age groups and the non-users.</p>	<p>Suitable routes to school and work are required to encourage Active travel. Provide routes to encourage cycling as a realistic mode of transport in the week as well as for leisure use at weekends.</p> <p>Further improve the Vegetation Clearance Contract across the county.</p> <p>Work with local authorities to clean up PROW network, remove litter, graffiti and dog fouling which acts as barrier to use.</p> <p>Improve general fingerpost and way marking maintenance.</p> <p>Improve the PROW network around areas and facilities with high leisure use. Promote and provide better signed circular routes to increase confidence in wider use.</p> <p>Knowing what is out there – improve accessibility of PROW information (see More Accessible Information / Increasing Knowledge &amp; Confidence above)</p>

<p><b>Better Promotion</b></p>	<p>The majority of users use the network for leisure and recreational pursuits, with limited use for daily commuting to work and going to school. The most common response when we asked why PROW are used was <b>‘To go for a walk / run / cycle / be active / healthy’</b></p> <p>Low levels of equestrian use in Kent residents groups (2%) that increased for the online group may be due to access to information.</p>	<p>Promote the benefits of Active travel to encourage this type of use and relate it to the most popular response when we asked why PROW are used (<b>To go for a walk / run / cycle / be active / healthy</b>)</p> <p>Promote specific types of network use, where there are suitable equestrian and cycle routes to encourage this type of use which is currently low.</p>
<p><b>Keep Communication Open</b></p>	<p>Initial contact with specialist user group and focus groups has helped shape the plan but ongoing communication with these groups is required to ensure efficient, flexible delivery of the plan over the next 10 years.</p>	<p>Set up annual meetings to update on progress, look at key development areas and potential gains to the network specific to each group.</p> <p>Provide updates of specific improved routes to user groups.</p>
<p><b>Efficient Delivery</b></p>	<p>Results showed that a low number of Kent’s residents had reported an issue on the Network (17%) compared to 67% of the online group.</p> <p>60% of the stakeholder respondents said that improvements relating to customer service were needed.</p> <p>57% of stakeholders were aware of the plans which had influenced several strategies, policies and projects.</p> <p>Phone and online contact were preferred methods for Kent</p>	<p>Look into improvements relating to customer service, with an emphasis on the need for a rapid personal response with direct email from a nominated person with PROW area knowledge.</p> <p>Increase awareness of ROWIP</p> <p>Give the customer a range of different methods to report an issue on the network where possible. Look into phone apps as a method of reporting an issue on the network while out and about, like Country Eye with possible links.</p>

	<p>residents whereas Online and Phone apps were the top two answers for the online group.</p>	
<p><b>Strategic Overview</b></p>	<p>Stakeholders indicated a need for the PROW network to change, to meet the future needs of an increasing population, providing a sustainable mode of travel and realistic alternative to the car.</p> <p>Better links to the network featured strongly and planning policy and strategies were considered as the mechanism to ensure this is incorporated within new development and transport plans.</p> <p>A strategic overview to identify opportunities for cyclists and equestrians including consideration of new bridleway routes and better connections to other PROW, woodland and transport hubs were highlighted.</p> <p>Well signed, well maintained routes with improved surfaces and no stiles were popular comments within the 'Better Maintained Network' theme.</p>	<p>Looking at the available PROW network and the barriers preventing use, taking a strategic overview to provide more relevant shared use routes and better links and access to facilities where needed.</p> <p>The PROW and Access Service will strengthen partnership working with planning bodies to make better sense of the network and provide a well maintained safe, pleasant environment to take people where they want to go.</p> <p>The plan aims to establish a higher design standard for specialist users and to incorporate these design standards where it is appropriate to do so for new and existing PROW. A higher standard of maintenance programme will be required for such routes and can be applied when funding is available.</p>
<p><b>Secure Additional Funding</b></p>	<p>Stakeholders identified specific improvements for users with visual or mobility problems. The biggest response was the need for a better physical network with smoother all weather wide surfaced routes.</p>	<p>Secure additional funding to increase the surface standard to provide wide, all weather smooth routes for improved access for people with mobility issues and wheelchair use.</p>