

# Lake District National Park Authority

## Rights of Way User Research

October 2019

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Draft Report

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## Executive Summary

The rights of way network in the Lake District National Park are very well regarded. Use of the routes bring significant physical and mental benefits to users, as well as having a positive knock-on impact on levels of activity for visitors once they get home. They also play an important role in destination choice for most visitors.

Marketing of routes should be concentrated online, as this is the most preferred option for information gathering, with maps, leaflets, word of mouth recommendations and Tourist Information Centres also still important.

There were no strong preferences for any kind of additions to the existing routes – in fact many people stated their preference for a natural state. There is some appetite for an increase in interpretation/points of interest, information about things to do in the area/suggested visit itineraries, both parking and public transport options, and improved way-marking and signage. There is also some demand for basic facilities such as benches, toilets, bins and refreshments. Market testing for new and additional routes was positive.

### Rights of Way User Survey

- 292 surveys were completed with people using selected rights of way routes between August and October 2019.
- Average party size was 2.8 people.
- 25% of people using the rights of way were aged between 25 and 44 years old, 24% aged between 45 and 59 years old and 31% were over 60.
- Comparisons with data from Cumbria Tourism's Visitor Survey (2018) showed that age profiles were very similar. The main difference was that there were twice as many pre-family groups (younger adults with no children) than younger family groups (children under the age of 10) on the rights of way network, than is found in the general profile of Lake District National Park visitors.
- 9% of people interviewed were local residents, 7% were day visitors, but most (84%) were staying visitors. Average length of stay was 5.2 nights.
- 3% were visitors from overseas. Origin regions of note (outside of Cumbria) were: Birmingham, Blackburn, Bradford, Bournemouth, Chester, Crewe, Durham, Darlington, London, Ipswich, Leicester, Leeds, Manchester, Newcastle, Preston, Stockport, Cleveland and Warrington.
- The majority (93%) were walkers. 7% were cyclists. 19% had dogs in their group.
- Half of all respondents had travelled to the start of their route by car or other private vehicle. 27% had walked, and 18% travelled by boat/ferry.
- Half of all route users had used the route they were on before. 17% found out about the route through maps or word of mouth. 13% used a search engine/website.
- The choice of route was dictated mainly by the views (64%), the fact that it was low level (50%), the terrain (38%), knowing how long it would take (33%) and proximity to home/accommodation (29%). For a fifth of respondents, the choice of route was influenced by there being a café/pub at the end, it being quiet, and it being accessible (miles without stiles).
- 60% of people would spend more than 2.5 hours on their chosen route, and 37% would spend between 30 minutes and 2.5 hours.
- 45% of people were using their chosen route for the first time. 17% had used it once or twice before, 17% had used it a few times previously, and 21% described their use of the route as quite frequent.

- Ratings for the routes in terms of overall experience, ease of finding the start, and footpath quality were all very high, with scores of over 90% rating as either 'good' or 'very good'.
- 12% rated signage as 'ok' and 6% gave a negative rating. 18% rated interpretation as 'ok' and 8% gave a negative rating.
- People were asked whether they felt better physically, or mentally, from their walk/cycle on the route. 77% said they felt 'very much' better physically, and another 19% 'quite a lot' better – in total 96% felt a physical benefit.
- 84% said they felt 'very much' better mentally, and another 14% 'quite a lot' better – in total 98% felt a mental benefit.
- People were asked for the top three ways in which they would prefer to find out about other routes. Online was the most popular option (58%). Other preferred options were via maps (33%), leaflets (30%), word of mouth (26%) and TICs (25%).
- People were asked if there were other things they would like to see on routes to encourage them to visit more often, or to get more out of their visit. There were no strong preferences for any kind of addition. 35% said they liked the routes as they are, natural, and don't want to see changes made. 16% wanted to see more interpretation/points of interest, as well as information about suggested visit itineraries/things to do in the area. 15% mentioned parking options and 13% public transport options. 13% wanted improved way-marking or signage, and 12% thought sculptures would be a good addition. 17 groups suggested benches/simple seating.
- People were asked what would prevent them from using particular routes, or from exploring new ones. Poor weather, and sharing routes with motor vehicles were the most significant barriers. 29% said that lack of parking facilities would prevent them using routes, as would the route being too difficult for 27%. Information is key – not knowing the level of difficulty, or how long a route would take would put off around a fifth of respondents.
- People using Windermere West Shore were asked whether, if there was a similar route to the south of the lake, they would use it. 83% said they would definitely use it, 14% would possibly use it, but 3% thought it was unlikely.
- People at Borrowdale were asked whether, if there was an easy off-road cycle/walking route to travel between Keswick and Rosthwaite, they would use it. 53% said they would definitely use it, and 25% would possibly use it. 18% thought it was unlikely they would make use of it, and 4% were unsure.
- A series of questions were asked of people who were not local residents, but visitors to the National Park:
  - Currently, this group of respondents are fairly active at home, with 16% doing 30 minutes to 2.5 hours of physical activity each week, and 83% at least 2.5 hours.
  - People were asked whether being outside and active while on their visit to the National Park had made them feel more like doing more of the same thing once they got home. 72% said 'very much so' and 23% 'quite a lot' – so there is a knock-on effect on activity levels from visiting the Lake District National Park and using the rights of way.
  - People were asked whether they would return to the route they were on. 71% definitely would, and 23% possibly would.
  - Two thirds (68%) said that having a variety of walking/cycling routes available was very important in destination choice, and 25% said it was important – so in total, having a variety of walking/cycling routes available would influence 93% of people in their destination choice.

# 1. Introduction

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The Lake District National Park Authority is in the process of developing a monitoring framework for Rights of Way Usage. This monitoring framework is intended to help deliver the 'Out There' strategy, by measuring the strategy's success.

The 'Out There' strategy goal is to achieve 'A better connected access network fit for purpose in the 21st Century, with high quality infrastructure, facilities and services meeting the needs of all users, in particular families and young people'

'Out There' strategy priorities are:

- Developing outdoor activity provision to meet the needs of families and young people and to improve people's health and wellbeing.
- Establishing baselines of user numbers and understanding of our visitors through monitoring and surveys.
- Increasing the numbers of people cycling on key promoted routes by 2040 from a 2020 baseline.
- Doubling the percentage of visitors under 30 visiting the National Park by 2040.
- Helping to secure investment to deliver projects that will enable visitors and residents to be more active and healthier.

In order to deliver against the strategy priorities, a greater insight and understanding of existing rights of way user groups, their needs, their health and activity levels, is required, in part to provide a baseline against which to measure progress.

As a starting point, user surveys were carried out on selected parts of the rights of way network between August and early October 2019. These were undertaken as paper surveys, by National Park volunteers who had been extensively briefed. Locations for interviews were Windermere West Shore, Borrowdale (at Rosthwaite and Brandelhow), and the Ullswater Way.

The questionnaire was designed to include information on:

- user profile (age, party composition, origin, visitor type)
- usage type (walking, cycling, horse-riders, wheelchair users etc)
- satisfaction with rights of way network (infrastructure, facilities, signage)
- motivations for making more use of the rights of way network
- benefits gained (emotional, physical)
- activity levels
- propensity to revisit
- propensity to make use of additional routes

The fieldworkers noted that some people at Windermere West Shore were trying to catch a particular ferry and so did not stop to be interviewed. The same was true for some families with young children at Gale Bay on the Ullswater Way, who wanted to get to the water and play.

## 2. Results

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In total, 292 surveys were completed, breaking down to:

- 152 at Windermere West Shore
- 45 on the Ullswater Way
- 57 at Borrowdale Rosthwaite
- 38 at Borrowdale Brandelhow

To try and achieve a representative sample, surveys were carried out over different periods of time, and during all weather conditions. 85% of surveys were carried out on weekdays, and 15% at weekends, and 64% were carried out during school holidays, with 36% during term time.

All surveys are subject to some degree of statistical error. The size of this error varies with the sample size, population size and strength of response. The table below shows a range of sample sizes, and the margins within which you can be 95% certain that the figures will be true if the sample is a random one. For example, if you have a sample size of 500, and 80% of them answered 'yes' to a particular question, you could be confident that any repeat of the survey would generate between 76.5%-83.5% 'yes' answers.

<b>Statistical Reliability</b>					
<b>Sample size</b>	<b>10% or 90%</b>	<b>20% or 80%</b>	<b>30% or 70%</b>	<b>40% or 60%</b>	<b>50%</b>
<b>500</b>	±2.6	±3.5	±4.0	±4.2	±4.4
<b>400</b>	±2.9	±3.9	±4.5	±4.8	±4.9
<b>250</b>	±3.7	±5.0	±5.7	±6.1	±6.2
<b>100</b>	±5.9	±7.8	±9.0	±9.6	±9.8
<b>50</b>	±8.3	±11.1	±12.7	±13.6	±13.9

A sample of 292 statistically produces answers at a 95% confidence level that will be accurate to +/-5.7% or better. It is generally accepted that an error level of around +/-5% is satisfactory for reliable and robust results, within accepted market research industry standards, and this sample falls just outside that range. This means that across the sites overall, results will be statistically robust, and for Windermere West Shore fairly robust (+/-7.95), but breakdowns at Ullswater and the Borrowdale sites can only be considered indicative and results at that level should be treated with caution.

## 2.1 User Profile

### Age and Party Composition

The 292 respondents were with 827 people in total. Average party size was 2.8 people.

25% of people using the rights of way were aged between 25 and 44 years old, 24% aged between 45 and 59 years old and 31% were over 60.

Age Group	Number	%
Under 5	22	3%
5 – 10	52	6%
11 - 15	53	6%
16 – 24	41	5%
25 – 34	96	12%
35 – 44	111	13%
45 - 49	70	8%
50 – 59	130	16%
60+	252	31%
<b>Total</b>	<b>827</b>	<b>100%</b>

Comparisons with data from Cumbria Tourism's Visitor Survey (2018) and this survey are:

#### Cumbria Visitor Survey 2018 (LDNP analysis):

- 17% of visitors under the age of 34
- 36% over the age of 60
- 11% pre-family (under 35 no children in group)
- 19% younger family (children under the age of ten)
- 5% mixed family (children under 10 and 11-15)
- 6% older family (children aged over 10 only)
- 59% post family (over 35 no children in group)

#### 2019 Rights of Way User Survey:

- 17% were under the age of 34
- 31% over the age of 60
- 20% pre-family (under 35 no children in group)
- 10% younger family (children under the age of ten)
- 5% mixed family (children under 10 and 11-15)
- 4% older family (children aged over 10 only)
- 61% post family (over 35 no children in group)

The profiles were very similar. The rights of way users had slightly fewer over the age of 60, but the main difference was that there were twice as many pre-family groups (younger adults with no children) than younger family groups (children under the age of 10) on the rights of way network, than is found in the general profile of Lake District National Park visitors<sup>1</sup>.

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<sup>1</sup> All comparison data is taken from the 2018 Cumbria Visitor Survey carried out by Cumbria Tourism, unless otherwise stated.

## Origin

9% of people interviewed were local residents, 7% were day visitors, but most (84%) were staying visitors. Average length of stay was 5.2 nights (similar to 5.3 nights for all LDNP visitors).

3% were visitors from overseas, including from Australia, Belgium, Canada, Germany, Holland and New Zealand. Other regions of note (outside of Cumbria) were: Birmingham, Blackburn, Bradford, Bournemouth, Chester, Crewe, Durham, Darlington, London, Ipswich, Leicester, Leeds, Manchester, Newcastle, Preston, Stockport, Cleveland and Warrington.

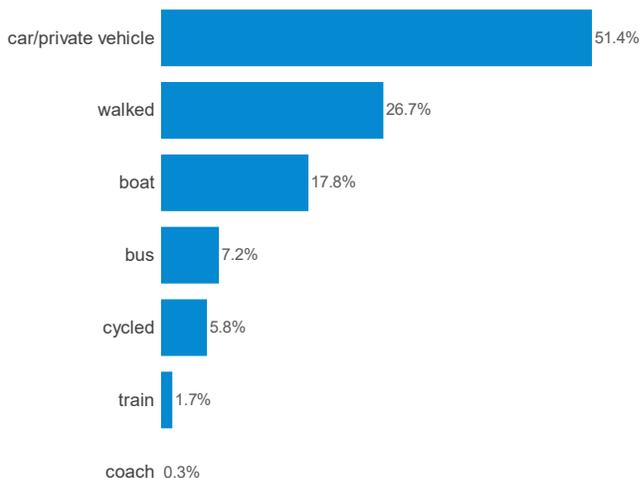
## User Type

The majority (93%) were walkers. 7% were cyclists. 19% had dogs in their group (similar to 20% for all LDNP visitors).

## 2.2 Route Profile

### Transport

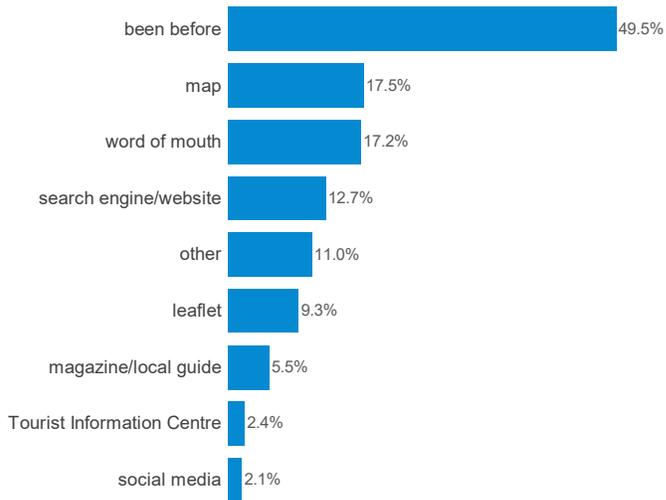
Half of all respondents had travelled to the start of their route by car or other private vehicle. 27% had walked, and 18% travelled by boat/ferry. (NB this question is multiple choice and so responses will exceed 100%).



There was variation by site. People using the Ullswater Way were more likely to have got to the start by car (80%). People at Borrowdale Brandelhow were more likely to have walked to the start of their route (53%). 32% of people on Windermere West Shore had travelled by boat/ferry, and 21% of those at Borrowdale Rosthwaite had arrived at the start by bus.

## Information

Half of all route users had used the route they were on before. 17% found out about the route through maps or word of mouth. 13% used a search engine/website.

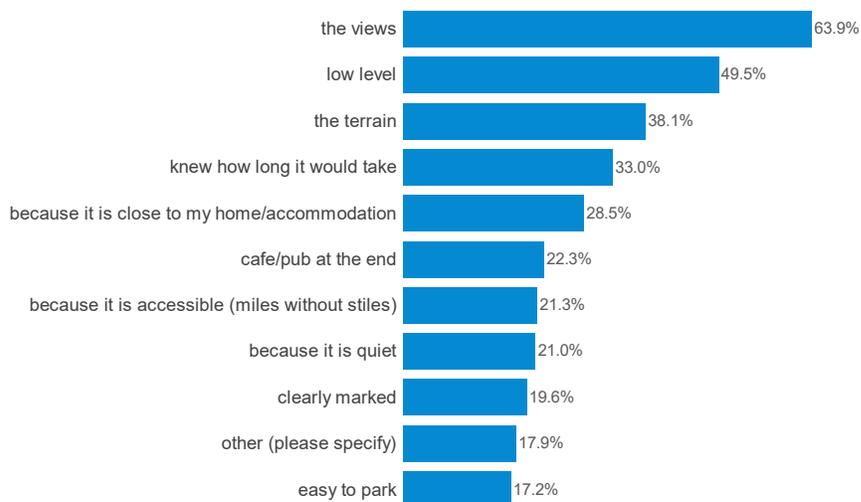


Some people had found out about the route through their accommodation provider (including hotels, b&b's, and campsites), and a couple had come across it by chance. Seven groups mentioned the National Trust as a source of information.

People at Windermere West Shore were less likely to have used the route before (40%) and more likely to have found out about it via leaflet or search engine/website. People at Borrowdale Rosthwaite were more likely to have used a map.

## Route Choice

The choice of route was dictated mainly by the views (64%), the fact that it was low level (50%), the terrain (38%), knowing how long it would take (33%) and proximity to home/accommodation (29%). For a fifth of respondents, the choice of route was influenced by there being a café/pub at the end, it being quiet, and it being accessible (miles without stiles).



Other reasons for choosing a particular route included: the opportunity to combine a walk with a trip on a boat; it being part of a bigger route; to walk the dog; because it was good for children on bikes; it being off road; and it being close to the lake.

People at Borrowdale Brandelhow were more likely to have chosen the route because it was low level (63%), and at Borrowdale Rosthwaite because they knew how long it would take (44%). People using Windermere West Shore and the Ullswater Way were more likely to say that their choice was because the route was accessible (miles without stiles) – 28%.

## Dwell Time

60% of people would spend more than 2.5 hours on their chosen route, and 37% would spend between 30 minutes and 2.5 hours.

People on the Ullswater Way tended to be on the route for a shorter time – 14% for less than 30 minutes, and 66% for between 30 minutes and 2.5 hours.

97% of people at Borrowdale Brandelhow were using the route for more than 2.5 hours.

## Previous Use

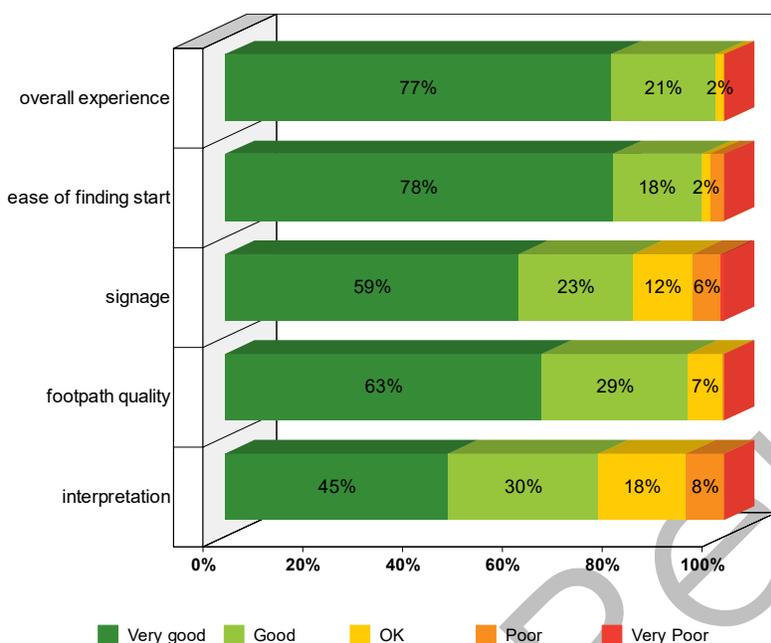
45% of people were using their chosen route for the first time. 17% had used it once or twice before, 17% had used it a few times previously, and 21% described their use of the route as quite frequent.

People using Windermere West Shore were more likely to be first time users (57%), while those using the Ullswater Way and Borrowdale Rosthwaite were more likely to be frequent users (30%).

## Ratings

Ratings for the route in terms of overall experience, ease of finding the start, and footpath quality were all very high, with scores of over 90% rating as either 'good' or 'very good'.

12% rated signage as 'ok' and 6% gave a negative rating. 18% rated interpretation as 'ok' and 8% gave a negative rating.



People on the Ullswater Way gave less favourable ratings for the overall experience, and the ease of finding the start. They were also more likely to rate interpretation as 'ok'.

Windermere West Shore fared better for signage than the other routes. People using the route at Borrowdale Rosthwaite were more likely to give a 'poor' rating for footpath quality, as well as for interpretation.

## Impact on Health and Wellbeing

People were asked whether they felt better physically, or mentally, from their walk/cycle on the route. 77% said they felt 'very much' better physically, and another 19% 'quite a lot' better – in total 96% felt a physical benefit. (This is an increase on 93% for all visitors to the LDNP).

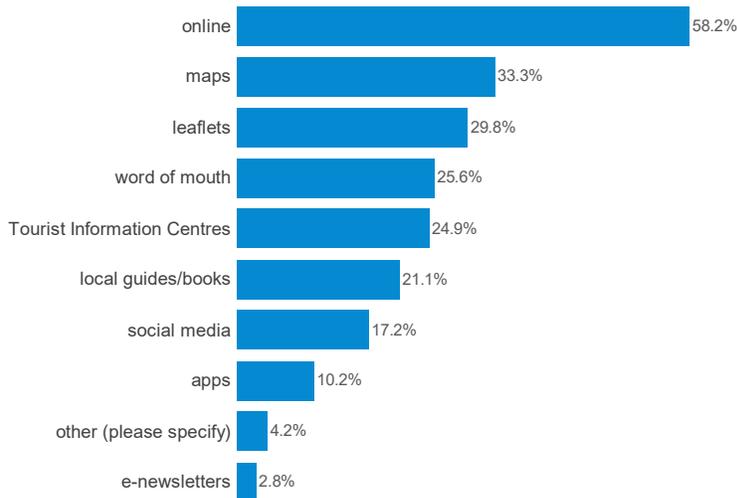
84% said they felt 'very much' better mentally, and another 14% 'quite a lot' better – in total 98% felt a mental benefit. (Also an increase on 94% for all visitors to the LDNP).

## 2.3 Future Planning

### Future Route Use

People were asked for the top three ways in which they would prefer to find out about other routes.

Online was the most popular option (58%). Other preferred options were via maps (33%), leaflets (30%), word of mouth (26%) and TICs (25%). One in five would prefer to use local guides or books.



People who were interviewed at Borrowdale (both sites) showed a stronger preference for using maps to discover new routes (47-48%). People that had been on the Ullswater Way showed stronger preferences for using leaflets (43%), as well as social media (46%) and online (70%). Those who had been on Windermere West Shore also showed a stronger preference for finding out about new routes online (65%), as well as from Tourist Information Centres (31%).

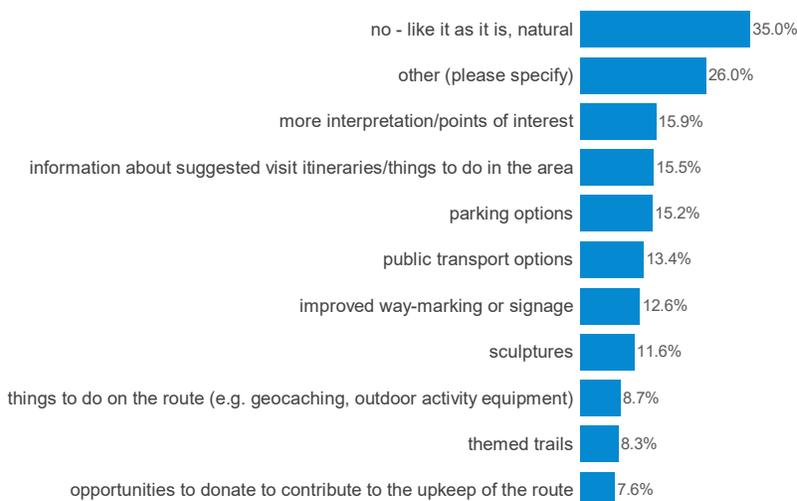
Other suggestions included through the National Trust (three mentions).

## Future Route Improvements

People were asked if there were other things they would like to see on routes to encourage them to visit more often, or to get more out of their visit.

There were no strong preferences for any kind of addition. 35% said they liked the routes as they are, natural, and don't want to see changes made.

16% wanted to see more interpretation/points of interest, as well as information about suggested visit itineraries/things to do in the area. 15% mentioned parking options and 13% public transport options. 13% wanted improved way-marking or signage, and 12% thought sculptures would be a good addition.



People who had been interviewed on Windermere West Shore were more likely to want information about suggested visit itineraries/things to do on the route (22%). Those who had been interviewed on the Ullswater Way were more likely to want themed trails (18%), improved way-marking or signage (20%), things to do on the route (e.g. geocaching, outdoor activity equipment) (15%), and parking options (25%). People who had been interviewed at Borrowdale Rosthwaite were more inclined to say change nothing, keep it as it is (56%), while those interviews at Borrowdale Brandelhow were more likely to suggest more interpretation/points of interest (24%) and opportunities to donate to contribute to the upkeep of the route (13%).

Other suggestions were for benches/simple seating (17 mentions), dog poo bins (11), toilets (11), refreshments e.g. coffee stops, ice cream vans (6), rubbish bins (5), things for younger children (3), and general picnic areas (3).

Also:

"board walks are good"

"difficulty finding appropriate spaces to 'park' the horse - not given consideration"

"disabled access"

"Do not make it like Yosemite! Themed trails low key - put themed walks onto apps."

"early bird parking"

"electric car charging points in car park/accommodation"

"information about the scenery"

"information on the type of footwear to use; signage advising where additional activities can be undertaken; what can be done along the route"

"kids like to know how old the trees are; more info on flora and fauna"

"lakeside access"

"less pitched paths"

"like it - the more rural the better, keep it simple; but signposts at the junctions"

"minimal road walking towards Waterside Park"

"dogs on leads"

"more explanation of the local area"

"nice sometimes to have a natural and peaceful route but still accessible for all"

"not change anything, like it as it is - 'take litter home' signs"

"orientation"

"particularly poor signage at Ambleside - needed to use phones to help"

"public transport options and prices"

"red squirrels"

"Respondent walks abroad and liked different colours on routes on posts in Austria with timing of distance."

"signs to inform cyclists that this is NOT a cycling route"

"stay as it is keeping it not too busy; facilities for motorcyclists"

"shuttle bus"

"walks for coach parties with pick up points"

"wildlife"

"wildlife"

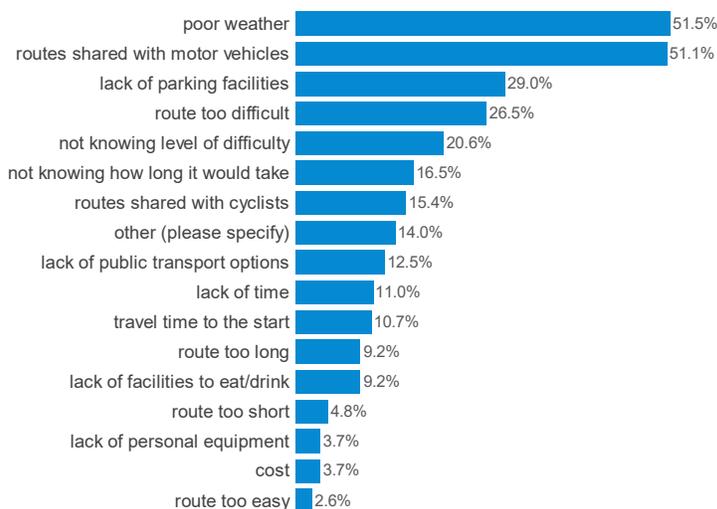
"wildlife; less is best, as it was in Wordsworth's time"

## Barriers

People were asked what would prevent them from using particular routes, or from exploring new ones.

Poor weather, and sharing routes with motor vehicles were the most significant barriers.

29% said that lack of parking facilities would prevent them using routes, as would the route being too difficult for 27%. Information is key – not knowing the level of difficulty, or how long a route would take would put off around a fifth of respondents.



Other barriers included a lack of toilets (10 mentions), a lack of dog poo bins (3), cost of parking (3), poor upkeep e.g. heavy bracken (3), waterlogged ground (3), too many people (2), poor signage (2) and lack of access for dogs (2) or dogs not on leads (2).

Also:

- "cobbles difficult with horses"
- "cyclists not using bells"
- "if it was not suitable for pushchairs"
- "lack of coach parking facilities"
- "litter, dog muck"
- "ok if cyclists have and use bells"
- "paying 40p for the toilet"

### **Additional Routes**

People using Windermere West Shore were asked whether, if there was a similar route to the south of the lake, they would use it. 83% said they would definitely use it, 14% would possibly use it, but 3% thought it was unlikely.

People at Borrowdale were asked whether, if there was an easy off-road cycle/walking route to travel between Keswick and Rosthwaite, they would use it. 53% said they would definitely use it, and 25% would possibly use it. 18% thought it was unlikely they would make use of it, and 4% were unsure.

## 2.4 Tourists

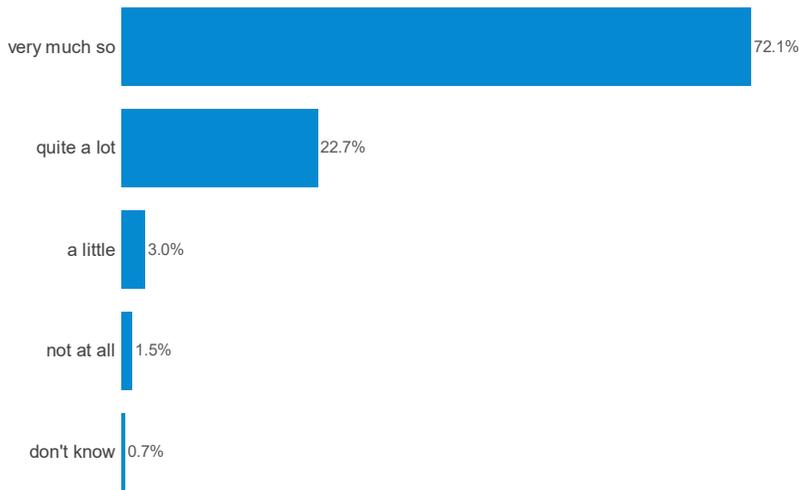
A series of questions were asked of people who were not local residents, but visitors to the National Park.

### Active Lives

Currently, this group of respondents are fairly active at home, with 16% doing 30 minutes to 2.5 hours of physical activity each week, and 83% at least 2.5 hours.

People were asked whether being outside and active while on their visit to the National Park had made them feel more like doing more of the same thing once they got home.

72% said 'very much so' and 23% 'quite a lot' – so there is a knock-on effect on activity levels from visiting the Lake District National Park and using the rights of way.



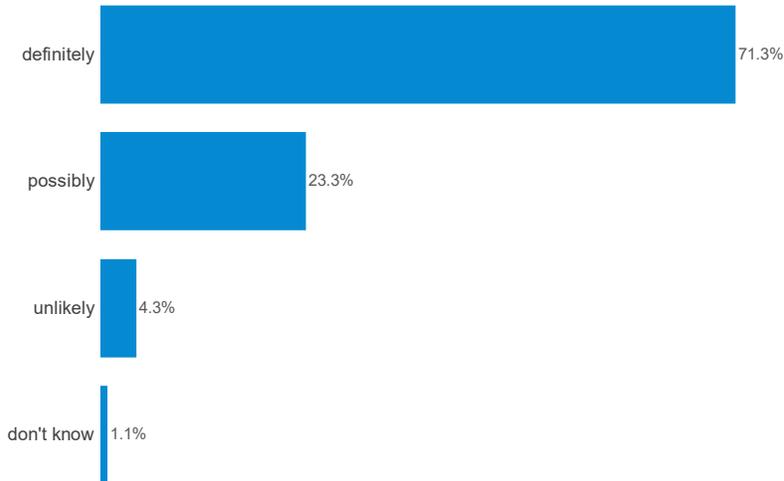
### Expenditure

People were asked about their spend per party on the day. On average, group spend was £107.52. This is lower than £172.76 for all visitors to the Lake District National Park, however there are factors to take into consideration – some of the volunteers felt uncomfortable asking this question, and apparently some respondents declined to answer. In addition, as most people were on spending the day walking, their levels of spend were automatically low.

Category	Total Expenditure	Spend per Group
accommodation	£16,592	£62.38
food and drink	£8,233	£30.95
travel and parking	£1,579	£5.94
visitor attractions	£244	£0.92
other recreation/leisure activities	£832	£3.13
shopping	£1,097	£4.12
other	£23	£0.09
<b>Total</b>	<b>£28,600</b>	<b>£107.52</b>

## Repeat Visits

People were asked whether they would return to the route they were on. 71% definitely would, and 23% possibly would. People that said they were unlikely to, often said that was just because they like to discover new places.



## Destination Choice

People were asked about the importance of having a variety of walking/cycling routes available when choosing a destination to visit.

Two thirds (68%) said that having a variety of walking/cycling routes available was very important in destination choice, and 25% said it was important – so in total, having a variety of walking/cycling routes available would influence 93% of people in their destination choice.

