



National Trails Annual Report 2014/15

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Executive Summary

This report is our second annual report and follows the publication of our 'New Deal for National Trails' in 2013. It covers the period from April 2014 to March 2015 and is structured to illustrate progress against the published Quality Standards for National Trails.

This has been a year of consolidation for the family of Trails – in some cases finalising details of a more robust monitoring system for the condition of the Trails themselves and in others making brave and innovative decisions about the partnerships they need to help them realise the ambition that National Trails are 'at least as good if not better than they are today' – the vision that was set out two years ago in the New Deal.

It has also been a year of growth in that three new stretches of the England Coast Path have commenced (Durham, Cumbria and Norfolk). We are beginning to collate data from these stretches and will continue to do so.

Walk Unlimited have continued to further develop the [website](#) as a self-financing project and details have been included in the report.

The information from the Trail Partnerships (and coastal partners) focusses on the Key Performance Indicators as set out in the Quality Standards and showcases numerous examples from each of the Trails which demonstrate the value of our investment.

Specifically this report shows that:

- National Trails continue to provide some of the country's best loved routes and the development of the website and use of social media is enabling more people to show how much they value these important recreational assets.
- Our evidence suggests that the Trails remain in good condition. Crucially all Trails are now, in some cases for the first time, putting in place rigorous monitoring systems which will provide more accurate data for assessing their performance in meeting agreed Quality Standards.
- We are beginning to establish a more comprehensive evidence base which will add to our understanding of usage and appreciation of the Trails as well as detailing more about the benefits realised by individuals, communities and local economies.
- The managers of new coastal stretches are keen to engage with the established National Trails 'Family', to contribute evidence and to learn from the existing Trail Partnerships.
- Volunteers are playing an increasingly important role in delivering the vision for National Trails and their contribution is well recognised.



The Aurora Borealis photographed from Offa's Dyke Path at Moel Famau

- Land managers and owners continue to demonstrate their support by supporting practical projects and in some cases becoming engaged in Trail Partnerships.
- National Trails partners have once again managed to sustain their investment in the maintenance of the Trails, matching Natural England's investment at 3:1.
- The basic investment in the Trails has allowed partners to lever in a further £735k for additional capital improvements and promotional activity.
- The Trails are working hard to draw in additional resources through a wide range of new and innovative activities.

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The Family of National Trails

There are 13¹ National Trails in England, totalling over 2,200 miles (3,541 km) and Natural England is currently leading work to establish a new National Trail around the entire coast of England. The map on page 6 shows the location of all the current National Trails and progress with the new England Coast Path (ECP).

The National Trails provide some of the nation’s highest quality walking and riding experiences and all of the routes are signposted and promoted with the acorn symbol. The National Trails are managed locally but within a framework of guidance and support provided by Natural England.

Our vision for National Trails is that they are a Family of the highest quality recreational routes connecting our finest landscapes for extensive off-road journeys.

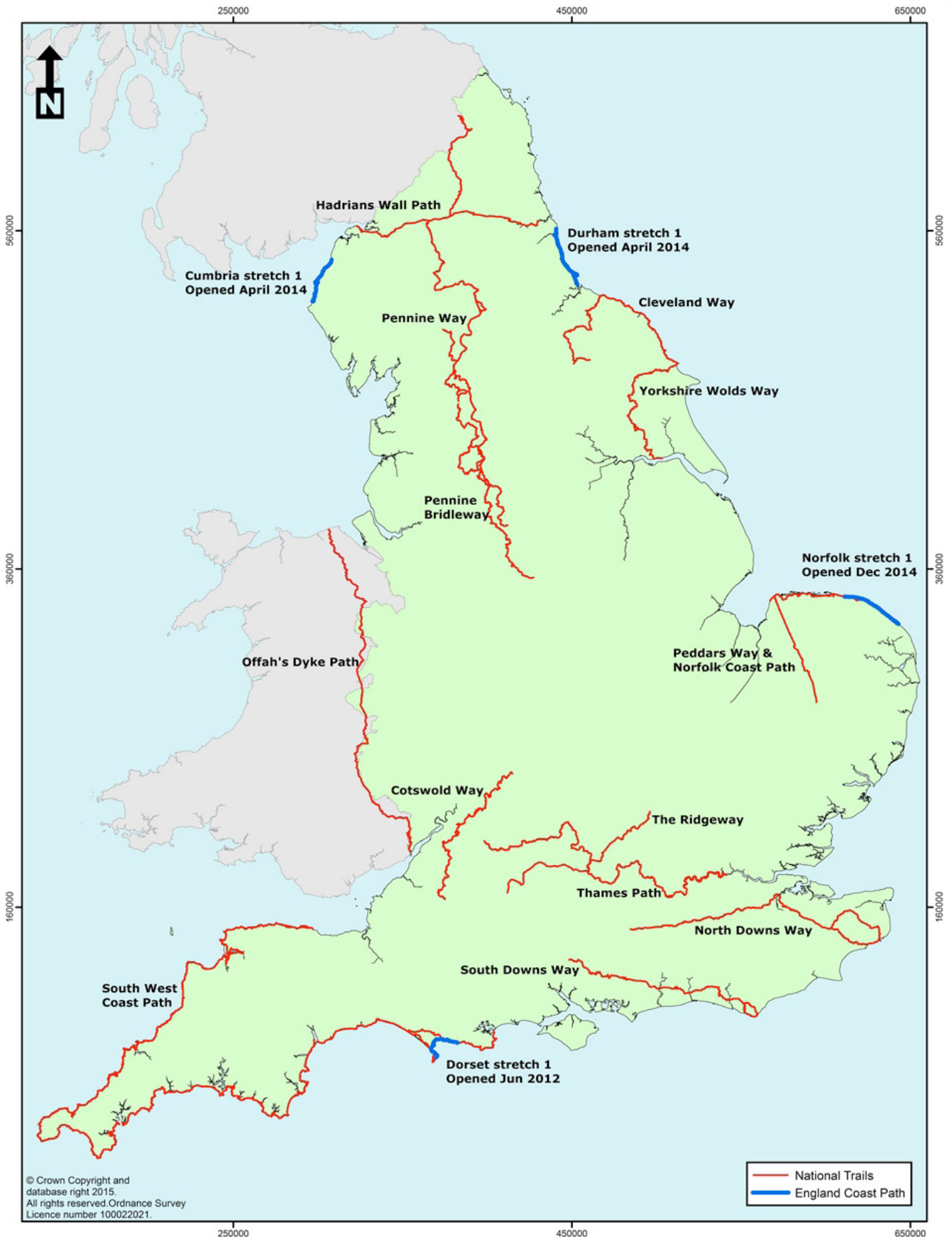


Opening Norfolk’s first stretch of the England Coast Path

¹ 15 in England and Wales. Note that the website and some of the research quoted in this report refer to the Family of 15 Trails.

National Trails & England Coast Path

England Overview – March 2015



The New Deal for National Trails

In March 2013, Natural England launched new management and funding arrangements for National Trails (the New Deal²). We promised that we would sustain our national contribution towards maintaining the routes – for a three year period from April 2013 to March 2016 – in exchange for local partners taking greater collective responsibility for delivery.

This document is the second in a series of annual reports which will help to demonstrate how Trails are delivering against the Quality Standards and also give an insight into the wide range of benefits from this unique recreational resource. It covers the period from April 2014 to March 2015 and provides information on how each of the Trails in England have continued to develop their working arrangements with local partners and are establishing more robust monitoring systems to help us demonstrate how they are delivering the Quality Standards for National Trails. These monitoring systems along with the current pattern of annual reporting now allow us to identify trends in the ongoing management of Trails which we have endeavoured to illustrate within this report.

As in the first annual report, we have also provided some conclusions and a forward look to take into account some of the work currently being undertaken in 2015/16. A full appraisal of work undertaken in 2015/16 and beyond will be provided in future reports.

National Quality Standards

One of the commitments we made as part of the New Deal management arrangements was that we would report annually on progress nationally towards meeting the Quality Standards. The Standards are set out in the New Deal and this report is arranged in four main sections which reflect our underpinning management principles for National Trails:

Experience – enable as many people as possible to enjoy a wide variety of walking and riding experiences along National Trails and through the English landscape.

Enhancement – make constant improvements to the Trail and its associated routes. Contribute to the enhancement of the landscape, nature and historic features within the Trail corridor.

Engagement – build and sustain a community of interest in caring for the Trail and the landscape through which it passes.

Economy – creates opportunities for local businesses to benefit from the use of National Trails.

The Quality Standards present a broad and ambitious menu for National Trails but included within them are some specific indicators by which we review progress. The ‘Key Performance Indicators’ (KPIs) that we monitor are:

1. **Improving Trail condition**
2. **Effective partnerships**
3. **Informative website**

² [New Deal document](#).

In addition, there are a number of ‘Key Indicators’ (KI’s) where we have suggested a range of things that may be measured in order to illustrate how National Trails bring benefits. Unlike the KPIs we do not insist that each of these is reported against but we have encouraged Trail Partnerships to think about how they can best demonstrate their wider contribution to these areas. As a condition of grant, we require additional resource leverage by Trail Partnerships at a minimum ratio of 3:1 (Natural England grant to local contributions). Within their annual report Trail Partnerships need to provide us with evidence of this minimum contribution and also details of any additional investment. This demonstrates how they are using our core investment to lever in further funds, and how they are able to use these additional funds to improve and develop the Trails rather than just sustain them.

As with our first report, the following sections set out a summary of progress under each of the headings for the management principles set out above. They detail progress specifically against the KPIs and also provide a selection of material evidencing the wider benefits of National Trails.

The information includes data collected by ourselves as well as the Trail Partnerships and Walk Unlimited. We continue to work with our partners to create better monitoring regimes and produce more robust evidence to develop consistent messages about the full range of benefits that National Trails provide. We believe that this is important for National Trails, for the emerging England Coast Path, and for further developing the evidence base to articulate the benefits of access and engagement with the natural environment in all its forms.



Enjoying a break on the Cotswold Way

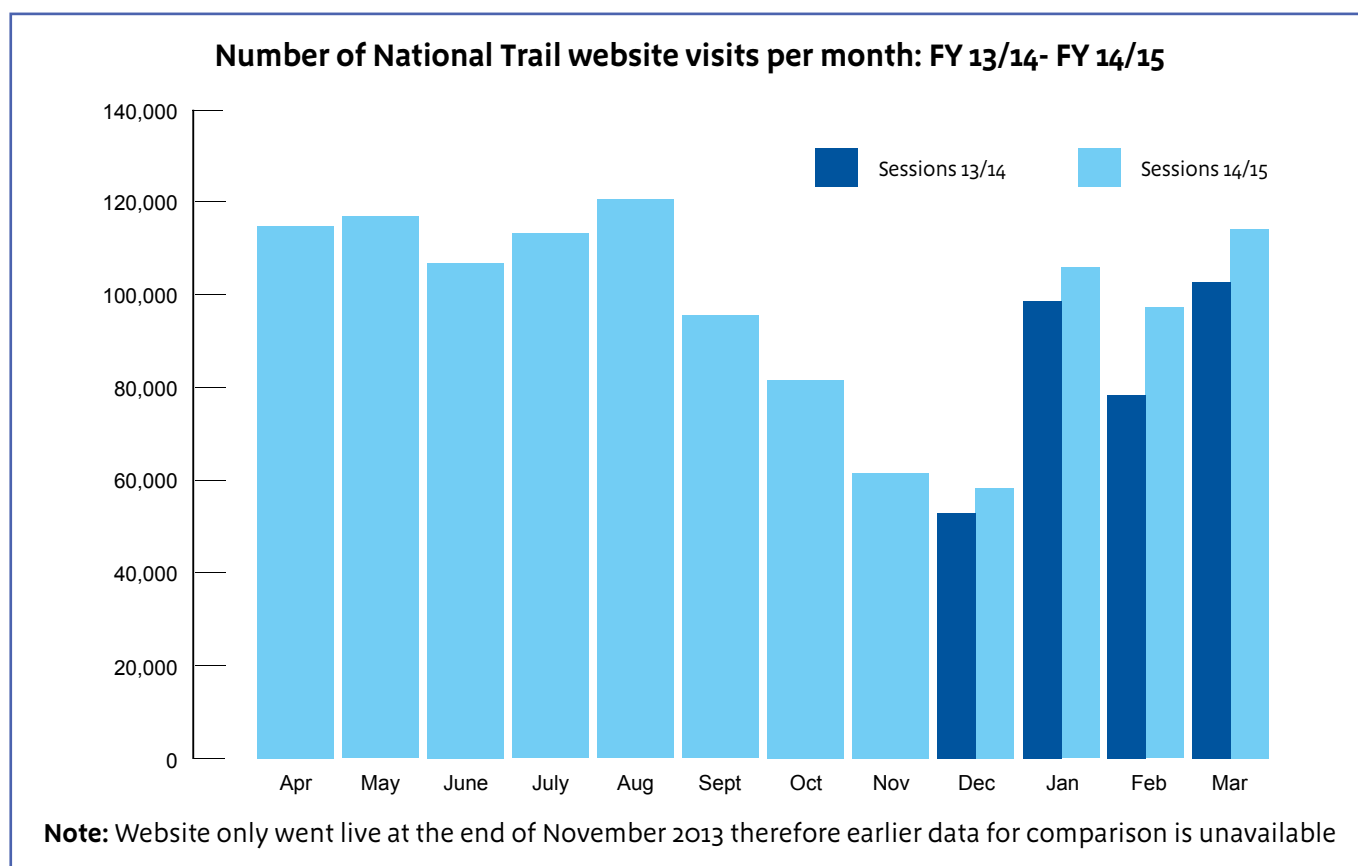
Experience

To enable as many people as possible to enjoy a wider variety of walking and riding experiences along National Trails and through the English landscape.

For 2014/15 our priority has been to continue to support information provision to users and service providers through the development of the independent website and consider how we might build our evidence base in terms of visitor data and public awareness.

Key Performance Indicator: Informative Website

Walk Unlimited have continued to build the functionality of the website and with support from the individual Trails improve the level of information that is available. They have continued to report quarterly to Natural England and Natural Resources Wales.



For 2014/15, the average number of pages viewed was 4.22. The average time spent on the website was 3 mins 50 secs and the 'bounce rate' (percentage of people that only viewed one page and left from that page) was 37.85³. All of these figures suggest that people are finding the information on the website both interesting and helpful and are searching for more.

³ Websites vary so widely that it is difficult to provide any meaningful comparison data, 'Analytics SEO' does provide however some averages overall which are : average number of pages viewed = 3.8, average time spent on a website 2 mins 40 secs and an average bounce rate of 42.5%.

According to Walk Unlimited’s monitoring reports, they estimate that 66% of visitors to the new website over this year were using it for the first time. Of the 1.19 million sessions undertaken on the website 81% came from the UK and 19% from abroad. Most popular locations being US – 5%, Germany – 2%, Netherlands – 1.75%, Australia – 1.37% and Canada – 1.31%.

Website enhancements during the year have included a ‘Hall of Fame’ for some individual Trails, events calendars and travel information.

In the last quarter of the year, Walk Unlimited reported a 13% increase in unique users on the website and noted that the busiest day throughout this period was Sunday - suggesting that the website was now engaging a different/new audience as well as retaining the existing one.

Walk Unlimited have also increasingly used both Facebook and Twitter to engage wider audiences. Analysis of the statistics indicates that people retweeting National Trail tweets include those with much larger numbers of followers than at the beginning of the year. Over the year Facebook statistics have similarly increased with the number of ‘likes’, ‘activity per day’ and ‘total reach’ showing growth of approximately 3 times, 4 times and 2.5 times respectively.

Individual Trail websites/use of social media

The Trails are increasingly taking advantage of the website to provide information and contact both users and businesses about their Trail. For example the Thames Path Trail officer blog is used both to inform users and volunteers and also to draw attention to the experiences people can expect to enjoy in a walk along the Trail. An example written in February 2015 has been included below:

‘Along the flood meadows of the Thames this winter I have noticed an increase in snipe and woodcock, and with this increase in such birds it would seem that the predators such as Peregrine Falcons have followed them. I’d love to show you a photo of a falcon swooping down on the snipe over one of the Oxfordshire flood meadows, but the action happens so quickly it’s over in a split second, however I’m sure that there are many budding wildlife photographers along the Thames, so if you do get an interesting wildlife photo on your walk then please do tell us about it and upload the photo on our interactive website.’

The Cleveland Way reported how they aim to keep the website looking fresh through regular news articles. There were at least 13 of these during the year (not including those that had been deleted as they are time limited). These included news of a lady who took 44 years to complete the whole route, a push to get people Geocaching and an article celebrating the work of volunteers. In addition the services side of the site has been improved with a full listing and details of cafes, pubs and restaurants.

Many Trails have also continued to build their relationships with the public through the use of social media – ie Facebook and Twitter – sometimes with a particularly interesting outcome.

An example from the Offa’s Dyke Path includes increasing awareness of a campaign entitled ‘Barefoot Billions’ which relates to someone who walked the Trail barefoot to raise awareness of the large number of children around the world who live their lives without any shoes. The Twitter feed provided a great story as well as pictures to share via other social media. The Trail officer, also reported that Twitter is now an integral medium for communicating about the Trail.



Google Trekker view of South Downs Way

Finally it is worth noting that work is underway to create a ‘Google Trekker view’ of all of the Trails (Google Trekker is the pedestrian equivalent of ‘Street View’). This was initiated in July 2014 on the South Downs Way when Google carried out a successful pilot on this National Trail, capturing about 20 kilometres along the chalk cliffs of Beachy Head and then inland over to the historic village of Alfriston. This section is now published and available on Google.

Key Indicator: Visitor satisfaction

As ever, the large number and wide range of glowing testimonials that the Trails receive from users bear witness to the quality of experience and also the fondness that people have for the Trails. We have some included some examples below.

The Thames Path: *“The Thames Path National Trail is a tapestry of English history”*
 – trip advisor comment

The Yorkshire Wolds Way: *“I have just completed for the second time the Wolds Way and it is just stunning. I live in South Cave so know the area well but once again I was taken aback at the beauty and solitude of the path.”*

The Trails clearly continue to cater for and attract both local and international visitors. The South West Coast Path Trail officer reported that the Trail is rated as one of the world’s top 10 hikes by Cable News Network (CNN). This reflects its international appeal and ability to attract foreign income.

Whilst overall the Trails can evidence high levels of satisfaction from visitors – most usually for signage and information on services - the medium of the website and social media interaction generally ensures that Trail staff are able to respond positively and promptly to any complaints from the public. This includes specific comments about vegetation management on the route which is particularly important during the spring and summer months.

Key Indicator: Level and type of use of the Trail and awareness of brand and degree of engagement

As part of Natural England’s commitment to building a better evidence base to support the Trails we commissioned a National Visitor Survey⁴ and also worked with the Natural Environment Research Council (NERC) to analyse the data provided by our people counters. The Visitor Survey report has been shared with all of the National Trails and highlights have been set out in Appendix 1. The student we hosted as part of our work with NERC also undertook some comparative work looking at the results from the visitor survey compared with those we reported last year which were taken from Natural England’s Monitor of Engagement with the Natural Environment (MENE) survey⁵ and general findings. These have also been included within the Appendix.

Some Trails conduct their own surveys which although not comparable with the national survey data provide important local management information in terms of trends. An example of this is work done by the South West Coast Path and further details are included under the economy section.

Many Trails have been successful in seeking additional resources to support particular promotional campaigns and/or undertaking new activities with visitors. For example almost half a million pounds of the funding secured by the South West Coast Path from the Coastal Communities Fund will be used for a major marketing, information and events programme. This will include brand development, building relationships with businesses, partners and path users and investment in new information for walkers at key locations.



⁴ Full copy can be obtained from Natural England on request.

⁵ Set up in 2009, the MENE (Monitor of Engagement of the Natural Environment) survey was first commissioned by Natural England, Defra and the Forestry Commission to provide baseline and trend data on how people use the natural environment in England.

One way of positively engaging with users is through the use of Passport Schemes. On the Hadrian's Wall Path the Trail Passport Scheme (which involves stamps being collected at various points along the Trail) is now in its thirteenth year. This is a very effective means of helping to raise funds and engaging with the Trail's users and it also prompts comments and emails from visitors who enjoy a personal souvenir of their journey.

A number of Trails are developing Geocaching events and have reported very positive results as shown by this selection of responses from participants of an event held on the Yorkshire Wolds:

"Fantastic family fun and free!"
"Found some beautiful countryside"
"Really good & nice walk"
"Good fun for the children"
"Excellent way to get people to walk, especially children"
"Really enjoyed this, it was excellent"
"We liked the bugs! We enjoyed discovering the route & geo-caching"

Finally the South Downs Way organised the first geotour event in England and the first on any National Trail. Geotours are a series of linked Geocaches, but with the addition of local businesses where users gain extra 'points' by eating at local establishments and staying in local accommodation. The tour can only be completed if some of the participating businesses are visited. Half of the caches that must be visited are along the National Trail.



A National Trail Geocache 'coin'

Conclusions and Forward Look

Continuing development of the website as one of the fundamental tools by which the public are able to access up to date information about National Trails remains a high priority going forward for both Natural England and the whole family of Trails. We hope next year to be able to report on further improvements to the site and more initiatives that have taken place aimed at ensuring that the site becomes self-sustaining financially.

Whilst most Trails have some form of local monitoring (which paints a valuable and colourful picture of the varied activities being undertaken), it remains a challenge to collate data that will give a consistent picture of visitors nationally. Whilst we hope to extend the network of people counters to include the emerging stretches of the England Coast Path, we are aware that, initially at least, this will only give local trend data although this will still be helpful to those engaged in local management.

The co-ordinating effect of the website is leading to a greater sharing of ideas and development of common facets and facilities across the National Trail Family, and as the networking between Trails continues to strengthen and grow the benefits for all Trails and users will also increase year on year.



Enhancement

To make constant improvements to the Trail and its associated routes. Contribute to the enhancement of the landscape, nature and historic features within the Trail Corridor.

For 2014/15 our priority has been to continue to work with Trail Partnerships to prioritise maintenance and to ensure that systems of reporting are sustained so that we can report on condition with confidence.

Key Performance Indicator: Trail Condition

In our first annual report last year we reported on the work the Trail Partnerships had undertaken to establish a baseline of information on the condition of their Trails. Whilst we require Trails to report to us annually, we don't expect all of them to undertake a full condition survey every year (although our guidance states that they should do this at least every three years). As well as written information in the form of narrative Natural England asks for specific data on Trail infrastructure (gates stiles etc) and the amount of vegetation control that takes place. This enables us to understand whether the condition of the Trail overall is improving, deteriorating or remaining relatively stable over the reporting period. The purpose of this section is to get a sense of overall direction of travel which will inform and influence Trail Partnerships in the following year in terms of their priorities for action.



Examples of erosion and revetment works on the Thames Path at Hurley

New Trail Partnerships have worked with Trail staff to review how their monitoring is undertaken and agree a detailed baseline. As a result we have not been able to report on the condition of all the Trails by referring to detailed comparisons of annual data. The Trails are however continuing to set new more robust baselines and whilst individual Trails did report concerns over long term funding and the continued threat of reduced resources, the majority have reported a sense of stability/improvement in overall condition.

There has been a reduction in the number of stiles and an increase in the number of gates reflecting the overall desire of National Trails to facilitate greater access. There have also been some increases in the amount of infrastructure and anecdotal evidence from the Trail partnerships confirms that additional work has been undertaken to establish a more rigorous base line of information.

Several Trails have emphasised the increasing importance of using their grant support to support and develop volunteers to help with annual maintenance tasks. This includes the Cotswold Way where Wardens patrolling the Trail on a monthly basis collect evidence to update the condition survey baseline for Trail condition reports.

In Norfolk, where a new stretch of the England Coast Path was opened in December 2014 by Norman Lamb MP, the route has since been audited and GPS files created for all infrastructure. This process will be rolled out to the existing Norfolk Coast Path and Peddar’s Way National Trail during 2015/2016.

All of the Trails have given examples of specific improvements to their routes which in some cases have attracted additional funding to complete them. Examples include on the Cleveland Way where stone slabs have been used to improve heavily eroded sections at High Blowart and at Hutton Morr (where National Park apprentices undertook the work) and on the Yorkshire Wolds Way where improvement works have taken place at Welton Dale, Turtle Hill, Goodmanham, and Kilnwick Percy.



National Park apprentices slabbing and ‘pitching’ at Hutton Moor (Cleveland Way)

Cliff fall damage has been repaired on the South West Coast Path at 21 locations as a result of securing Coastal Communities and Environment Agency Funding. Match funding was also provided by the South West Coast Path Association (SWCPA) and Highway Authorities.

Finally two Trails secured additional support to invest in 'End Marker' projects. One of these was the Cotswold Way whose project concluded in Chipping Campden where the Trail Partnership supported community groups to raise £13,000 to install an interpretive marker stone.

Responses to these improvements have been very positive as shown by the following testimonials from people using the Yorkshire Wolds Way:

"I walked my dog beyond the railway bridge this morning and saw the resurfacing of the boggy section of Wolds Way. It is brilliant and thank you for arranging for this work to be carried out"

"I went on a regular walk around Welton Dale today. I did the same walk about two weeks ago and it was a muddy mess on the path through the trees. Not pleasant at all. Today, what a surprise, the worst parts of the path had been recovered with chalk and the edges reinforced with wood in some places, which made the walking enjoyable and no problem. Many thanks to the footpath team."

Key Indicator: [Quality of the Trail corridor](#)

Although the main priority for Natural England's investment in the Trails is maintenance of the route itself, there is a need (in recognition of the outstanding landscapes through which trails pass) to support improvements to the wider corridor. We are delighted to see the value of the corridor is recognised by the Trail Partnerships and that creative partnership working and innovative approaches have been key factors in leveraging in additional income which enables further improvements to be undertaken.

On the South Downs Way 2014/15 has been the final year of a three year Nature Improvement Area (NIA) project called "South Downs Way Ahead" funded by Natural England and 23 other partners. This project resulted in £291,146 being spent on improving the Trail Corridor through species rich chalk grassland restoration work on 49 sites.

On the North Downs Way staff are now working with a number of landscape scale initiatives along the route. They include the recently completed Valley of Visions Landscape Partnership Scheme in the Medway Valley area of Kent and the recently approved 'Old Chalk, New Downs' Heritage Lottery Fund project between Cuxton and Otford.

These initiatives provide opportunities to enhance the wider corridor, attract additional funding and gain mutually beneficial outcomes.

Key Indicator: Improvements to Accessibility

All the Trails are seeking to improve accessibility to ensure that as many people as possible are able to access them. Often this involves replacing stiles with gates or gaps and overall, from Trail reports, the number of stiles replaced with more accessible alternatives has increased.

The Yorkshire Wolds Way team continue to make the Trail more accessible to all and the removal of more stiles this year brings them closer to their ambitious plan to be the first footpath dedicated National Trail to be entirely stile free. Sometimes improving accessibility has involved realigning the route itself. An example is the diversion of the Trail at Sylvan Dale which was completed this year. This was the steepest section of the whole route and one of the few parts of the Trail to suffer from path erosion as people struggled to hold a single line up the hill. The new diversion has created a zigzag, which lessens the gradient considerably and allows walkers to enjoy some of the excellent views of the Sylvan Dale landscape.



Completing access improvements on the Yorkshire Wolds Way

Conclusions and Forward Look

One of the most important achievements of the last two years has been the development of more robust monitoring regimes for all of the Trails. From this we are confident that we, and the Trail Partnerships, will be in a better position to gauge the impact of future investment on the network of Trails. We are working closely with coastal access authorities to ensure that, as the England Coast Path commences, there will be similar systems in place to enable us to monitor the long term condition of this new recreational resource.

On balance we believe that Trail Partnerships are currently sustaining National Trails ‘at least as good, if not better, than they are today’ and are demonstrating that better promotion of the quality product that the National Trails are, gives them a good basis for leveraging in additional funds to help support the works that our grant cannot e.g. for capital improvements and enhancements to the wider corridors.



Engagement

To build and sustain a community of interest in caring for the Trails and the landscape through which it passes.

For 2014/15 our priority has been to support Trail Partnerships in evolving their structures and Delivery Frameworks to ensure they can develop longer term visions for their trails.

Key Performance Indicator: Effective Partnerships

Last year we reported that 8 of the 13 Trails in England had a Trail Partnership in place. This year we are delighted to report that all 13 Trails had Trail Partnerships in place by April 2015, although these figures mask some major challenges across the family during this time. This includes several changes in arrangements, lead partners, and membership of Partnerships, as those engaged in the longer term management of the Trails evolved their management arrangements. For those who were more settled, there was a shift of emphasis from the development of structures to development of management plans and some spent part of the year involving partners and stakeholders in consultation exercises.

Self assessment

Natural England has set out a number of criteria for Trail Partnerships which can be used as a check list to ensure that the Partnership is operating effectively in terms of the expectations set out in the New Deal. At our annual meeting of Trail Partnership members in April 2015, we asked each Trail Partnership to self assess themselves against these criteria and the results are set out below:

Trail Partnerships Minimum Requirements Assessment – April 2015																	
Trail Checklist ↓	Delivery				Management				Collaboration			Engagement					
	Quality Standards	Trail Condition	Local Contributions	Resource Management	Local Commitment	Membership	Accountability to Natural England	Constitution and Governance	National Promotion	Evidence	Best Practice	Peer Review	Single, named contact	Feedback	Consultation	Community Involvement	Integrated Delivery
Cleveland Way	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Yorkshire Wold Way	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	■	✓
Offa's Dyke Path	✓	✓	✓	✓	✓	✓	✓	■	✓	✓	✓	■	✓	✓	✓	■	✓
Norfolk Coast Path and Peddars Way	✓	✓	✓	✓	✓	✓	✓	■	✓	✓	✓	✓	✓	✓	✓	✓	✓
Cotswold Way	✓	✓	■	■	■	✓	■	✓	✓	✓	✓	■	✓	■	✓	✓	✓
South Downs Way	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
North Downs Way	✓	✓	✓	✓	✓	✓	✓	■	✓	✓	■	■	✓	✓	✓	■	✓
South West Coast Path	■	■	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Ridgeway	✓	✓	✓	✓	■	✓	✓	✓	✓	■	■	■	■	■	✓	■	✓
Thames Path	✓	✓	✓	✓	✓	■	✓	■	✓	✓	✓	✓	✓	✓	■	✓	✓
Hadrian's Wall Path	■	■	■	✓	■	✓	✓	■	✓	■	✓	■	✓	■	■	■	■
Pennine Way	■	✓	✓	■	✓	✓	✓	■	■	■	■	■	✓	■	■	■	■
Pennine Bridleway	■	✓	✓	■	✓	✓	✓	■	■	■	■	■	✓	■	■	■	■

✓ = TP meets/fulfils this ■ = Plans in place but not delivered/complete
 x = Not met, and not likely to be in a position to meet in current year

We hope to repeat this exercise annually to monitor how Trail Partnerships are evolving and responding to new challenges and opportunities.

Probably one of the greatest changes has been the separation of the management group looking after the Thames Path and Ridgeway into two groups. At the joint National Trails Management group meeting in March 2015, both Delivery Frameworks were formally signed off bringing into existence two separate Trail Partnerships.

The Ridgeway Partnership includes existing highway authorities, North Wessex Downs and Chiltern AONBs, the Chiltern Conservation Board, Friends of The Ridgeway, and Country Landowner and Business Association. The Thames Path Partnership includes existing Highway Authorities, The River Thames Alliance, The River Thames Society, The Thames Estuary Partnership, Transport for London and The Royal Borough of Kingston on Thames and both of the AONBs.

Last year we reported that the partners responsible for the Pennine Way and Pennine Bridleway had agreed to have a joint Partnership arrangement and that a shadow Partnership had been established with the Yorkshire Dales as lead partner. As from April 2015, this Partnership was formally established and a new Pennine Trails Partnership Manager post created.

Another positive change took place for the Norfolk Coast Path/Peddar's Way where the Trail partnership has been developed into a stand-alone group dealing exclusively with the National Trail. This was previously operating as part of the Norfolk Local Access Forum who continue to be involved in the new partnership via their Chairman. A new Delivery Framework has now been developed.

In terms of governance and forward planning, 2014/15 has been a transitional year for the North Downs Way. Responsibility for the Trail migrated from the Surrey Hills AONB to the Kent Downs AONB team and the Trail Partnership was extended to include two Destination Management Organisations and also the Diocese of Canterbury. The latter's involvement will allow for greater opportunities to develop initiatives that benefit people wishing to follow the 'pilgrim' routes that are coincident in places with the National Trail.

In other instances several Trails have consolidated their Partnerships and have been able to focus on the development of more detailed management/action plans. This includes the South Downs Way where the partnership has widely consulted on and agreed a new five year management plan.

With respect to the Cleveland Way, the Trail Partnership meets twice each year and provides an opportunity for partners to update each other and to monitor the progress of the Action Plan. The draft management plan was consulted on widely by all interested parties such as user groups, Parish Councils, Country Landowner and Business Association, the National Farmers Union and local businesses and has now been approved. It is a rolling action plan, which looks ahead three years and is partly aspirational, depending on successes in funding and partner input. Other organisations such as the National Trust (who are a significant local landowner) and Historic England have responded well to the plan and have started to put their events onto the website.

Key Indicator: Level and type of engagement/voluntary participation

One aspect of the New Deal is to challenge Trail managers to actively engage with a wide range of partners, either directly through their formal Partnerships or more indirectly either through local working arrangements, or through their engagement with wider strategic partnerships in their area. Specifically they were encouraged to develop volunteering opportunities. This has continued to evolve over the past 12 months.



Business Engagement Workshop for the Offa's Dyke Path

Offa's Dyke Path Liaison Group is now a well-represented partnership with officers from the various AONBs, Local Authorities, National Parks, Cadw and Historic England being present at annual meetings.

With respect to the North Downs Way the 'Securing the Trail/Landscape Initiative' operating in the Medway Gap section of the Trail involves a broad range of organisations including Kent Police, three local authorities, an off-road user group, community wardens, parish council representatives and many others. Known as a Tasking and Co-ordination Group it allows a rapid and co-ordinated response to illegal off-road activity when it occurs and effective targeting of the Police Community Support Officer's actions. In addition the work undertaken on an extensive new section of steps at Oxted Downs along with associated viewpoint clearance was undertaken by the social enterprise 'Connection Crew' who provide work placements and ultimately employment for people who possess suitable skills and have experienced homelessness.

Volunteers clearly play a key role in supporting necessary maintenance work to secure the higher quality standards across the National Trails family. They also fulfil other complementary roles such as leading walks. With respect to the Hadrian's Wall Path some 120 Trail volunteer reports were received in 2014/15 representing 60 volunteer days spent out on the Trail.

These volunteers patrol monthly and report issues to the Trail officer. Some have specific responsibilities, such as changing tidal predictions notices in the notice boards on the Solway marshes section of route.

The work of the Cotswold Voluntary Wardens has been critical to improvements on the Cotswold Way. The Wardens patrol the Trail on a monthly basis, providing evidence which is used to update the condition survey baseline for real-time Trail condition reports. Organised in an effective and efficient manner they have been willing to take on additional work such as vegetation clearance and wider capital projects.

The Cleveland Way National Trail Officer has worked with nine different volunteer groups over the past year, many of which have regularly carried out maintenance work. This includes the 'Explorer Club', which is family based. A number of families from the Explorer Club took up a pilot Cleveland Way Adoption Scheme which started in May last year. This involves families 'adopting' their own length of the Cleveland Way, carrying out minor maintenance and recording wildlife. Those who took part gained a great deal from it and several families and a Scout Group have signed up again for this year. Overall 436 volunteer days of maintenance were carried out on the Cleveland Way which is in addition to the Trail Partnership meeting the 3:1 match funding requirement.

The South Downs Way is largely maintained using volunteers who work closely with the South Downs Volunteer Ranger Service (which has over 300 active volunteers). In addition the South Downs Way team are helped by 28 dedicated voluntary wardens that patrol and survey their 'home' section on a monthly basis, reporting faults and carrying out minor repairs.

The Thames Path and Ridgeway have been developing corporate volunteering opportunities and there have been 12 Business Corporate days organised with volunteer groups numbers ranging from 15-20 people. Businesses involved include Arval and Nationwide. Awards are also made to the group which has made the most significant contribution to the well-being of the River Thames in any one year and in 2014 the Thames Path National Trails Volunteer Scheme was awarded the The River Thames Society Shield.



Volunteer working on the Thames Path



The River Thames Society Shield which was presented to the Thames Path National Trail Volunteer Scheme

Finally it is great to see Trails sharing ideas about working with volunteers and a fact-finding visit to the Cotswold Way National Trail by representatives from the South West Coast Path is enabling them to develop further ideas about co-ordinating and supporting a wider more active volunteer network to help with practical work.

Key Indicator: Land manager satisfaction with the management of the route

All Trail Partnerships work closely with land owners when undertaking maintenance and/or improvement works on their land. This ensures there is minimal disruption to private and/or commercial operations and that landowner needs can be taken into account at the same time as those of Trail users. Evidence of how important these relationships are and the benefits that arise from them has been supplied by Trail Partnerships and a selection has been included below.

On the Cleveland Way the Helmsley Estate jointly funded the 40 metres of slabbing work on their land at the start of the Trail.

On the South Downs Way in Hampshire work with a local farmer has improved the stream flow adjacent to the Trail and future work on Trail surfaces and culvert replacement will mean less flooding of adjacent fields.

On the North Downs Way the 'Securing the Trail' initiative has received significant support and satisfied responses from key landowners in the Medway Gap section of the Trail where, as mentioned earlier in this report, there has been a need to tackle illegal off-road activities.

All these examples provide an indication of the good levels of support that Trails enjoy from local landowners.



BEFORE and AFTER: Step repairs on the South West Coast Path at Kynance

Conclusions and Forward Look

Consolidating Trail Partnership arrangements locally and sharing ideas between Trail Partnerships will be important as we move forwards – particularly as new stretches of the England Coast Path commence and local highway authorities look to the existing family for ideas in terms of best practice. Natural England will continue to support the development of these arrangements and encourage Partnerships to share information through Huddle⁶.

In the next year we hope to undertake an audit of the range of partners who are now engaged in the management of National Trails.

With continued cutbacks in local authority spending, it is clear that many Trails are becoming increasingly reliant on volunteers to help them to maintain Quality Standards. We recognise the extremely positive impact that volunteers have on National Trails across the whole country and we will continue to work with Trail Partnerships to record the details and promote the value of their contributions.

⁶ A defra funded 'on line' networking site.

Economy

To create opportunities for local businesses to benefit from use of National Trails.

For 2014/15 our priority has been to encourage Trails to evidence the value of benefits – particularly to their local areas – of our and their investment in the Trails.

The New Deal document sets out the benefits that we believe flow from the National Trails and in this section we have set out the investment made by ourselves as well as that of our partners in order to maintain Quality Standards. We have also shown the additional resources that have been levered in to realise a broader ambition for National Trails.

Example - Experience

Pennine Way 50th Birthday The Partnership worked with Walk Unlimited to produce a webpage to engage people to walk one of 50 sections on the anniversary. The BBC produced a three part documentary to celebrate the event filming interesting people and landscapes along the trail.

Example - Engagement

On the South West Coast Path local businesses were key in helping South Hams with a storm damage appeal that raised over 20k. Good relationships with a local Golf Course were crucial in managing a cliff fall and ensuring continued safe use of route and positive media coverage.

Example - Enhancement

Following tidal surges in 2013 the final stages of repairs to Norfolk Coast Path were completed. The majority of the work was funded by the Environment Agency.

Example - Economy

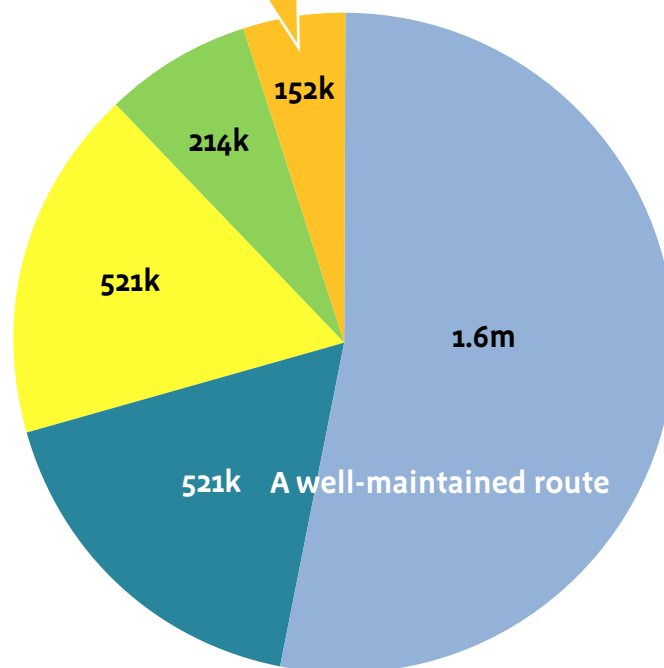
The Cleveland Way have entered into a Trademark Licence agreement for the acorn with the Helmsley Brewing Company. This three year agreement allows them to produce the official beer for the Cleveland Way, known as "Striding the Riding" In return they are supporting the Trail via contributions from beer sales

Includes funding to progress outstanding creation works associated with the Thames Path and Pennine Bridleway

Contributions

- Natural England Formula Grant
- Match Funding Required
- Highway Authority Additional
- Other
- Natural England Additional

Total Budget 3m



Note: Examples shown illustrate activity undertaken on Trails which is in addition to general maintenance and is supported by funds levered in to match Natural England grant.

At a strategic level it is helpful to understand how Trail Partnerships are not only securing the match funding that is part of Natural England's requirement but also how they are using our funding to lever in additional resources which allow them to invest in activities over and above the annual maintenance of the Trail. Examples include marketing and promotion, capital improvements or in some cases access projects that facilitate easier access to the Trails themselves. These are areas that are often not covered by Natural England's basic grant and the fact that Trail Partnerships continue to undertake these works illustrates both the value that partners and stakeholders place on the National Trails themselves and their commitment to realising a more ambitious vision for their long term development. Examples include the Offa's Dyke Path where the whole Trail corridor has greatly benefited from the 'Walking with Offa' project over the past 3 years. This project has resulted in additional Trail furniture, the development of new circular routes and the promotion of engagement with communities / individuals. Offa's Dyke Path staff have also been helping to develop Walkers are Welcome Towns, organise training events and promote Walking Festivals. The project has now finished and the partners are now working towards the next phase.

A number of Trails are also benefiting from the Coastal Communities Fund. This includes the South West Coast Path where just over £1000k was secured for a project to run from 1st September 2014 – 30th October 2016. This project will fund significant capital works and help with marketing and promotion including brand development. Other benefits include building relations with businesses and providing new information for users at key locations.

On the Norfolk Coast Path £200k of funding has been secured for the Explore More Coast Project which is designed to create new jobs in coastal businesses and protect existing ones by promoting the new sections of the Norfolk Coast Path which are being created as part of the England Coast Path. Part of the programme also involves providing training to businesses to enable them to take full commercial advantage of the new opportunities and the feedback to date that has been received from tourism businesses close to the new sections of National Trail has been extremely positive.

The Cleveland Way are currently planning to use Coastal Communities Fund funding to develop interpretation of the Peak Alum works through which the Trail passes.

Across the National Trail Family pressure on budgets has driven staff to be quite innovative in terms of raising some additional resources for their Trails.

The South Downs Way visitor giving scheme includes contributions of £1 from each event participant and financial income from this source is expected to grow to as much as £10k in future years.

The Hadrian's Wall Path management team have updated and improved their Trail Passport Scheme and reported that:

'Looking ahead to the remainder of the 2015 season income from sales of passports, certificates and badges is very buoyant and has already covered set up costs'.

They have also started selling old finger posts;

'When we decided to try and sell old signpost fingers we were surprised to see how quickly they were sold with remarks such as: "having the sign with its acorn in my kitchen will remind me how brilliant Hadrian's Wall Path, and National Trails are'.

Key Indicator: Benefit to the local economy

Securing better and more robust evidence about this particular benefit is one of the most important priorities for Natural England particularly when we consider the potential to develop evidence in relation to the England Coast Path as a new National Trail. Whilst we are in the process of developing a robust framework for this crucial part of our evidence base many Trail Partnerships continue to provide local examples of the contribution that their Trails make to their local economy, particularly in relation to the local businesses that are contracted to maintain and improve them. For example on the North Downs Way surface enhancements and vegetation maintenance are all undertaken by local contractors, and bespoke fencing is supplied by a Kent company and installed by a Kent contractor.



Locally produced fingerposts on the Yorkshire Wolds Way

On the Yorkshire Wold's Way twenty new fingerposts have been installed which have been supplied by a local business and seasonal undergrowth has been cut by local contractors and landowners.

On the Cleveland Way fingerposts have been supplied by local joiners, and grass cutting and surfacing contracts have been carried out by local contractors and in some instances by the National Trust.

This investment in local businesses ensures that the funding we provide not only allows Trails to be well maintained but directly benefits the local economy.

Key Indicator: Service providers' satisfaction with the management of the route

One of the fundamental principles of the New Deal is that local service providers are recognised as important to the future of the National Trails network – as legitimate stakeholders and as potential supporters of the Trail. There is good evidence that all the Trails fully recognise this and the South West Coast Path Association (SWCP) have strengthened links with local communities and businesses. £37,000 has been raised through business sponsorship linked to their Gold, Silver and Bronze supporters' scheme.

As part of the Rural Development Programme for England funded 'Unlocking our Coastal Heritage' project, the South West Coast Path team commissioned research to estimate the economic value of the South West Coast Path and track it on an annual basis. They have recently been able to update this information and at the time of printing their key findings are that between 2010 and 2014.

- South West Coast Path users grew by 11% from 7.8 million to 8.7 million / year;
- Expenditure by South West Coast Path users increased by £86.7 million from £382 million to £468 million;
- Number of full time equivalent jobs sustained by expenditure incurred by South West Coast Path walkers increased by 1,877 to 10,610;
- Overall spend by South West Coast Path walkers increased by 22.7%, compared to 12.2% for tourism as a whole within the region.

Cromer (through which the England Coast Path now runs) has now become a Walkers are Welcome town which has been developed and run by the local community and the National Trail steering group will be looking at the Walkers are Welcome approach during 2015/2016 and identifying opportunities for future development which can benefit the wider National Trail. They are also continuing to erect fingerposts that direct people on the National Trail to relevant businesses nearby.

As part of the 50th anniversary celebrations for the Pennine Way, new signage and way marking was created by the Hebden Bridge Walkers Action Group to create a loop from the Trail that passes through this small Town. This is a great example of a local group recognising the potential of the Trail to boost the local economy.

On the South Downs Way up to 250 people walked the full length of the Trail over 9 days as part of the annual South Downs Way walk. The company organising the event took the time to write to the Trail staff commenting on the improvements that they have seen over the past 30 years, and expressed their appreciation in terms of the significant contribution these improvements make to their business.

'We had reason recently to look back at photos of the trail taken 30 years ago and to talk to people who had walked the trail in the 1980s. The most striking thing was just how much the trail had changed in such a relatively short time; in parts it was completely unrecognisable. Almost all these changes have been for the better and clearly would not have happened without a dedicated team implementing a management plan and having the funding to do so.'

It is clear to those of us who are continually involved with the Trail that a great deal of work goes on behind the scenes to achieve the improvements we enjoy each year. Given time, money and enthusiasm there is plenty more that can yet be done.'

Conclusions and Forward Look

Although the financial situation in the public sector remains challenging, Trail Partnerships have been successful in retaining local commitment for continued investment and leveraging in additional funds to support projects that are not covered by the grant from Natural England, (such as capital improvements and promotional work). However if this commitment is to continue, and build in terms of the England Coast Path, it is vital that we further develop our evidence base to better demonstrate the benefits. Thanks to the reports from the Trails there is a growing body of evidence of the value of National Trails in terms of the income to local service providers from visitors and also the use of local contractors/suppliers to carry out development works⁷ and routine maintenance work. We now need to take the opportunity of the development of the England Coast Path to capture data which truly illustrates the difference that the development of this resource makes to the local economy.



⁷ Including establishing a new route in case of the England Coast Path.

Natural England's performance in 2014/15

In spite of continued pressure on resources, Natural England has continued to champion National Trails and monitor how they are delivering the Quality Standards.

During 2014/15 we;

Continued to invest £1.6m per annum in the upkeep of the National Trails in England.

Invested a further £19.5k in the ongoing maintenance of three new stretches of the England Coast Path in Durham and Norfolk.

Provided an additional £152k of additional resources that has helped National Trails respond to exceptional weather and make progress in resolving long standing creation issues.

Presented our first annual report to a meeting of national stakeholders in November 2014.

Worked with our partners to develop appropriate partnership arrangements for all 13 National Trails.

Established an on-line social networking site (Huddle) specifically for Trail managers to discuss Trail issues, share good practice and to create an efficient mechanism for distributing guidance and other Trail related information.

Welcomed announcements regarding the acceleration of the England Coast Path and worked closely with Defra to provide financial estimates of ongoing maintenance needs.

Worked with Natural Resources Wales to provide oversight of the national website and maintained responsive and positive relationships with Walk Unlimited.

Supported the Trails in increasing and improving the content of the national website to the benefit of users.

Working together

Building on the success of our first National Trail Partnerships meeting in May 2014, we held a further one in April 2015. Having received both positive feedback and helpful suggestions from our first meeting, we ran a series of workshops at this event which enabled Trail Partnerships to share good practice and support each other in developing innovative ideas for the management of their respective Trails.

We received further positive feedback from this event – particularly from those newly appointed into National Trail staff roles, with many suggesting more detailed workshops and possibly even a longer event including an overnight stay in the future. We will take these views into account when planning future events.

Next Steps

Reviewing the effectiveness of the 'New Deal' funding arrangements

During our review of the funding and management of National Trails (2011-13) we worked with representatives of all Trails to look at how we could best fund the Trails going forward. This group created and unanimously agreed a funding formula which has guided our investment in National Trails for the three year period from 2013/14 to 2015/16 inclusively. This group recommended that, in order to offer Trails some certainty, we should review the formula early in the 3rd year of its operation. A funding formula review group was established in 2015 and a report submitted to Natural England which will inform future funding discussions. Further details will be included in our next annual report.

Acceleration of the England Coast Path

Working closely with the teams delivering the England Coast Path will ensure that a smooth transition takes place between the creation of the route and a 'business as usual' phase in terms of working collaboratively at the local level and promoting support for ongoing maintenance.

Website development

The focus for the website now is to develop its ability to be financially self-sustaining both in terms of its current functionality and desired future enhancements. This will enable both users and service providers to continue to fully enjoy the benefits the Trails bring. There is also a need for continued joint working between Trail Partnerships and Walk Unlimited to develop attractive opportunities for users, service providers, local communities and potential commercial partners.

Evidence

We believe that the work we are undertaking with the existing Trail Family to collate evidence of the benefits of National Trails (complemented by our national work through the recent visitor survey and the network of people counters) provides a sound basis for the development of a well-balanced programme of evidence to support National Trails. As work on the England Coast Path accelerates, our priority will be to work with colleagues and partners to ensure that this programme is developed to include evidence of the benefits of this new National Trail as it evolves.

Trail Partnership development

We will continue to support Trail Partnerships as they evolve and develop so that they are able to take full advantage of their local situation and can maximise the benefits of their Trail for users and local communities. We recognise that these partnerships (particularly those developing on the England Coast Path) may adopt different models that best suit their needs and that this is best achieved in consultation with ourselves, managing authorities and local stakeholders.

Appendix

Visitor Survey

The survey of leisure visits to National Trails in England was undertaken by Tourism South East (TSE) Research on behalf of Natural England⁸. The survey involved personal interviews with a random sample of visitors at sampling points across England's 13 established National Trails and on two recently opened stretches of the new England Coast Path. In total 2,415 visitors were interviewed between July and November 2014.

The headline findings were:

- Ninety-eight percent of visitors are either 'extremely satisfied' (67%) or 'satisfied' (31%) with their visit.
- The top three reasons for visiting were:
 - i) 'to enjoy the scenery' (68%)
 - ii) 'to get fresh air or to enjoy pleasant weather' (61%)
 - iii) 'for health/exercise purposes' (60%).
- 28% were visiting for the first time and 38% visit once or twice a month or more. One in ten visitors who live within 10 miles visits the Trail daily.

People counter data analysis

In total, there are 16 people counters sites in England; one located at each National Trail, plus 3 located at some of the new sections of the England Coast Path - Durham, Norfolk and Somerset. Locations were carefully selected by contacting Trail officers and asking for high volume sites where the majority of counts represent a recreational visit to the Trail. Each site was surveyed before installation to check suitability and to decide on the optimum location for the counter.

Headline findings

A big variability in the number of annual counts was observed among the sites. Malham Cove (Pennine Way), Fiddlers Island (Thames Path) and Newlands Corner (North Downs Way) all registered the highest number of counts at over 100,000.



⁸ Full copy can be obtained from Natural England on request.

Similar patterns between the locations for pedestrians' records were noticed. Some of the most prominent features are:

- Seasonally, summer registered significantly more counts than winter, with July, August and April being the most visited months and January, February and December the least popular.
- Visits remained fairly stable during the week with an increase of around two thirds on Saturdays and almost 100% on Sundays compared to weekdays.
- The day peak was around 1pm with visits remaining steady between 11am and 3pm.
- Less variability was recorded between weekdays and weekends during school holidays.
- For most of the sites there is a statistically significant correlation between the highest monthly temperature and the number of monthly counts.
- The days recording the highest number of counts were 6th of April (Easter Monday Bank Holiday), followed by Sun 5th of April, Sat 21st June and Sun 24th August.

The sample size for cyclists and horse riders is smaller since data was registered at smaller number of sites. Records in the different available locations seem to follow different patterns but we noticed that bikes and horses have a later daily peak than pedestrians.

Interestingly, for horse riders, the weekly pattern of visits goes in reverse: counts are higher during the week compared to those at weekends.

Comparative study

Although the National Trust visitor survey 2014 and the MENE surveys are not directly comparable in terms of methodology it was nevertheless possible to draw comparisons between certain factors/criteria, including:

Make-up of party: The proportion of respondents for National Trails who were accompanied by dogs was significantly lower than for the natural environment in general – 41% compared to 52%. There is a similar pattern in relation to children being present in the party.

Reasons for visiting: Visitors to the National Trails are far more likely than visitors captured in MENE to be looking forward to enjoying the scenery, fresh air and pleasant weather.

Age categories: Compared to the average population, more visits to the National Trails were made by children and young people aged 0-24 and adults between 45 and 64.

Comparative data was also obtained on activities undertaken, main mode of transport used to destination, distance travelled to reach destination and duration of visit. Other factors relating to social groupings and general health of users were also compared.



Winter on the Ridgeway

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ISBN 978-1-84754-238-7

Catalogue Code: NE643

www.gov.uk/natural-england

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