



National Trails Annual Report 2013/14

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NATIONAL TRAILS 



Executive Summary

This report is our first annual report on National Trails and follows our 2011-13 Review. It covers the period from April 2013 to March 2014 and is structured to illustrate progress against the revised Quality Standards for National Trails.

We believe that good progress has been made during this first year with 8 out of 13 Trails confirming new delivery arrangements that will enable them to achieve the ambition that National Trails are 'at least as good if not better than they are today'. Each of the Trail Partnerships with new delivery arrangements have submitted annual reports and all Trails have reported on Trail condition.

In addition, Walk Unlimited, our promotion partners for the family of Trails has developed the new website and use of social media, and has also provided quarterly updates.

The information from these partners focusses on the Key Performance Indicators as set out in the Quality Standards and showcases numerous examples from each of the Trails demonstrating the value of our ongoing investment. Specifically this report shows that:

- National Trails continue to be enjoyed by millions of visitors every year. For some they provide a life changing experience, whilst for many others they are regularly used, well-loved paths where they can enjoy the benefits of the natural environment.
- In spite of challenging financial circumstances and some recent extreme weather events, on the whole the National Trails in England are in good condition with some ambitious plans for further improvements to the routes and their corridors.
- New Trail Partnerships have extended and reinvigorated their membership to improve local accountability and ensure that a wide range of stakeholders have the opportunity to engage.
- Volunteers help to care for and promote the National Trails and the introduction of Trail Partnerships has been a positive factor in facilitating and enabling greater involvement.
- Local tourism businesses continue to benefit from visitors attracted by the high quality experience National Trails offer.
- The total investment in National Trails during the period was some £3.8 million with Natural England's contribution being matched almost pound for pound.

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Introduction

In March 2013, Natural England launched new management and funding arrangements for National Trails (the New Deal¹). We promised that we would sustain our national contribution towards maintaining the routes, in exchange for local partners taking greater collective responsibility for delivery.

This first annual report, for the period from April 2013 to March 2014, provides information on how local Trail Partnerships have responded positively to the challenges we set them in delivering our Quality Standards and illustrates some of the many reasons people value National Trails. It also provides an opportunity to reflect on the success of our overall priority which was to establish condition information baselines and develop a discipline of regular monitoring. We have also provided some conclusions and a forward look which takes into account some of the work we are currently undertaking in 2014/15.

This document is the first in a series of annual reports which will demonstrate progress towards achieving our Quality Standards for National Trails.

The Family of National Trails

There are 13² National Trails in England, totalling over 2,200 miles (3,541km) and Natural England is currently leading work to establish a new National Trail around the entire coast of England. 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.

¹ <https://www.gov.uk/government/publications/management-of-national-trails-the-new-deal>

² 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 2014



The New Deal for National Trails

From April 2013 Natural England introduced new management and funding arrangements for the National Trails. The New Deal was confirmed after a two year review and consultation with partners. Key features of the New Deal are:

- We provide a new national funding package with improved transparency, equity and certainty of funding and in exchange local partners take greater collective responsibility for their Trails.
- We set more ambitious national Quality Standards and provided overall Trail condition is good or improving, Trail Partnerships have greater flexibility in how these are achieved.
- The development of a new partnership to lead promotion of the family of National Trails and work alongside the individual Trail Partnerships who are responsible for providing relevant and engaging Trail specific content.



Cleveland Way sign in the snow.

- In order to receive funding under the New Deal arrangements, Trail Partnerships must demonstrate to us that they have suitable arrangements in place to deliver the Quality Standards locally. This is referred to as a 'Delivery Framework' and during 2013/14 (and continuing into 2014/15) we have been supporting our partners to develop and agree these local arrangements. Progress made during 2013/14 in establishing Trail Partnerships and developing suitable Delivery Frameworks is reported on in the Engagement section of this report.
- The New Deal arrangements will ultimately apply to the England Coast Path as it becomes established as a National Trail, although in the short to medium term the focus will be on core maintenance, monitoring and information provision.

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 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;

- **Improving trail condition**
- **Effective partnerships**
- **Informative website**

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 necessarily 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 encourage additional resource leverage by Trail Partnerships at a minimum ratio of 3:1 (Natural England grant to local contributions). We require Trail Partnerships to evidence this, and to give us detail of any additional investment as part of their annual reports to us.

The following sections of this report set out a summary of progress under each of the headings for the management principles set out above. They detail progress specifically against the KPI's (including evidence of match and additional funding levered in by the Trail Partnerships) and also a selection of material evidencing the wider benefits of National Trails as set out in the Key Indicators. The information in this report includes data collected by ourselves as well as the Trail Partnerships and Walk Unlimited.

This is the first year of reporting since the New Deal was published and we recognise that there is more work to do to build a more robust system of monitoring and help partners to collaborate to develop consistent messages about the full range of benefits that National Trails provide.

Compiling and analysing this evidence is important for both demonstrating the value of the investment in National Trails and also for building the evidence base for access and engagement with the natural environment more widely.

Experience

Our underpinning management principle is to **enable as many people as possible to enjoy a wide variety of walking and riding experiences along National Trails and through the English landscape**. For 2013/14 our priorities have been to launch the new website and improve our understanding of visits to National Trails and public awareness of the brand.

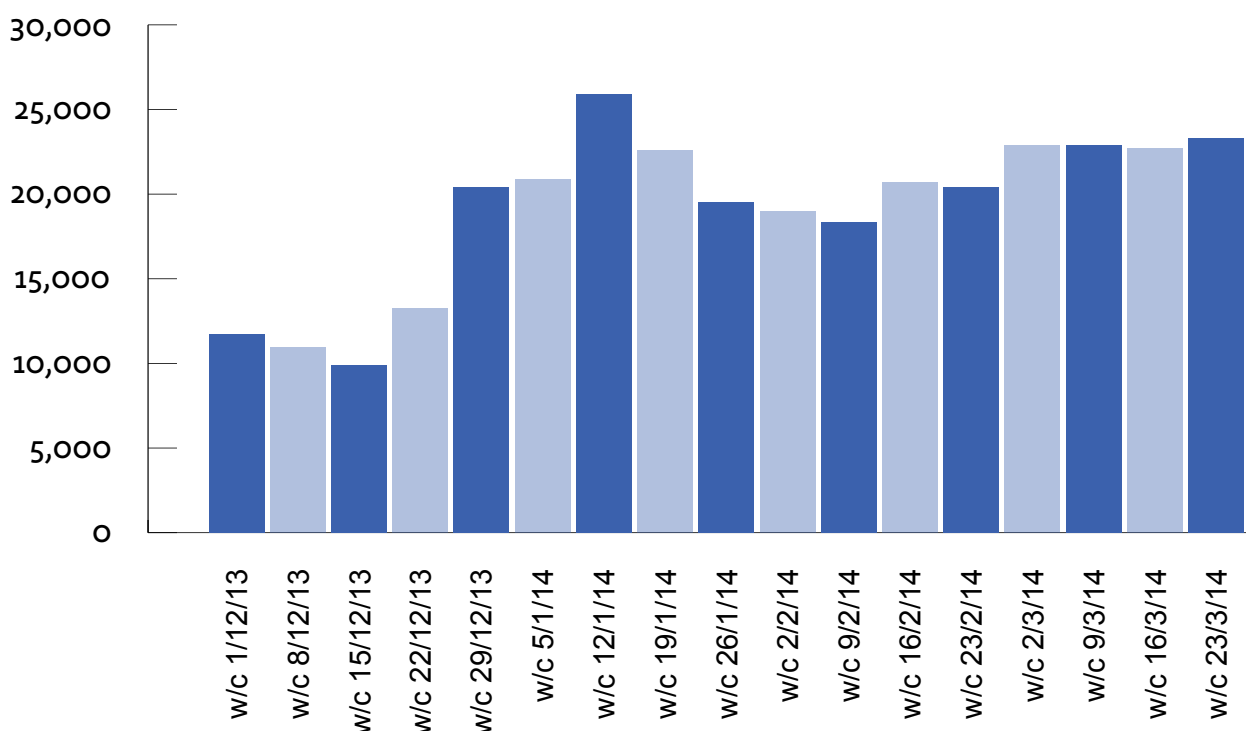
Key Performance Indicator: Informative Website

Since January 2013, promotion of the National Trail family in England and Wales has been undertaken by Walk Unlimited (formerly Walk England), primarily through the development of a new website (www.nationaltrail.co.uk) and use of social media. Promotion of individual National Trails however remains a key responsibility of the individual Trail Partnerships. Enhanced by an agreement with Ordnance Survey, the website includes an interactive map with features to help people plan their visits to National Trails and opportunities for both local businesses and users to upload content. The intention is that the site will make it easier for traditional users of National Trails to plan their journey and to make the most of their visit through awareness of nearby events as well as reaching out to new markets.

Walk Unlimited (WU) report quarterly to Natural England and Natural Resources Wales. The new website went live in November 2013 and was officially launched on 13th January 2014 attracting publicity from national, regional and specialist press, tourism and single issue bodies, as well as via social media campaigns.

Monitoring of the website usage is ongoing, with the first four months summarised on the graph below.

Number of National Trail website visits per week



WU have established Twitter and Facebook accounts for the National Trails family which, like the website itself, have a growing following. Local Trail Partnerships have supported the development of the new website and over half of the Trails also have Facebook and Twitter accounts. Many are beginning to actively use the blog facility on the website as a means of regularly sharing up to date information about their Trails.

WU have received a significant level of unsolicited positive feedback for the site as illustrated by the 'Tweet' below:

Tweet from @blackowich @NationalTrails love new site! beautifully depicts life on trail. trip planning tools wonderful addition 2 site...so much easier to plan trek.

Individual National Trails Websites:

A number of National Trails have their own website to which the new one provides appropriate links whilst retaining core comparable information about each Trail in the family. Probably the most successful/best known of these is the South West Coast Path site which provides a wealth of information about the South West as a destination via its own dedicated website www.southwestcoastpath.com. In 2013 it had its most successful year yet with over 570,000 visits and 2.1 million page views.

Key Indicator: Visitor Satisfaction

The significant numbers of **unsolicited testimonials** that Trail staff receive from users provides us with one of the best measures of customer feedback. Some examples of this feedback have been included below:

Thames Path: *'We would describe the Trail as awesome. We had the best time. Scenery and peace were wonderful. Sometimes we felt we were the only people in the world'.*
Evan and Kay from New Zealand.

Offa's Dyke: *'Spent my 50th birthday in Llanthony and Hay on Wye. Went for an 11.5 mile run up the Vale of Ewyas and back along the ridge following the ODP. Absolutely stunning and couldn't think of a better way to spend my big day'* Tony

Pennine Bridleway: *'I would really like to congratulate all the team involved in the conception, implementation and maintenance of the Pennine Bridleway. After riding the full length over 10 days with my friend Jo we were truly impressed with the excellent route marking (even out in the middle of nowhere!) and the quality of the gates. well done!!* Andrea



Presentation at the South West England Tourism Excellence Awards 2013-14.

One further measure of the success of National Trails is the external recognition they receive through various **Awards**. In the year to the end of March 2014, the Yorkshire Wolds Way received a Highly Commended Award in the Best Visitor Attraction Category at the Real East Yorkshire Tourism Awards (REYTAS). Similarly, the South West Coast Path was presented with the 'Outstanding Contribution to Tourism Award' at the South West England Tourism Excellence Awards 2013-14.

Key Indicator: level and type of use of the Trail and awareness of brand and degree of engagement ³

Many of the National Trails undertake some form of monitoring of usage including via their own people counters or through anecdotal evidence from volunteer wardens. Reports suggest that the number of visits to National Trails in 13/14 have equalled or exceeded previous years although there is a need for data that is more robust and comparable.

In the absence of a nationally comparable dataset, Natural England undertook to establish an initial baseline of information on both usage and awareness using our Monitor of Engagement in the Natural Environment Survey (MENE).

The MENE⁴ survey collects a range of information about people's visits to the natural environment. This includes the type of destination, the duration of the visit, mode of transport, distance travelled, spend, main activities and motivations for the visit. It collects data on people that do not visit the natural environment and the reasons for this. The survey also collects information about other ways that people engage with the natural environment, such as watching wildlife and volunteering. This helps develop understanding of how people interact with the natural environment.

In February 2013 we commissioned a supplementary study, using MENE to estimate the volume of visits to the natural environment benefiting from investment in National Trails and to improve our understanding of people's awareness and views about these routes. This previously unpublished study will provide a baseline against which to measure awareness and perceptions of National Trails in the future.

Using previously collected MENE survey returns we estimate that between 63 and 140 million visits to the natural environment are taken per year to places passed through by a National Trail⁵. The higher estimate is based on all visits with a final destination on or within 500 metres of a National Trail while the lower estimate is based on a tighter 100 metre buffer zone. These visits are undertaken by people from a broad demographic spectrum for a wide variety of reasons.

³ Note –'degree of engagement' is considered under the 'Engagement' section

⁴ <http://publications.naturalengland.org.uk/publication/6710511932538880>

⁵ All MENE respondents who have taken a visit to the natural environment during the seven days prior to interview are asked to provide specific details on the location of their main visit destination. This information is then used to source a geocode associated with the visit. Over the three years of surveying from March 2009 to February 2012 a destination geocode was sourced for over 61,000 visits taken to the natural environment. To identify those that may have involved a National Trail for at least part of the visit, assumptions were made about what constituted a sensible and realistic distance from a National Trail before the geocode was discounted.

New surveying was undertaken in March 2013 when 1,701 respondents were asked specific questions regarding National Trails. Headline findings from this work are:

- **31% of English adults recognise the white on black National Trails acorn symbol** but fewer recognise the black on white alternative (20%). However, specific knowledge of what the symbol represents is lower (around 10%) and varies significantly by age and geography.
- While **most people (74%) recognise the name of at least one or more of the 15 National Trails**, levels of recognition vary significantly between routes.
- **Around a quarter of the population (27%) rate National Trails as 'very appealing' places to visit in future** – this equates to around 11 million people. Interest is greatest amongst the most affluent socio-economic groups, those aged 45+ and people without children living at home.
- A **lack of time** due to work or home commitments, issues related to **health or old age, poor weather** and a **lack of local trails** are the most frequently provided reasons for not visiting National Trails more often.
- To encourage visits, more could be done to provide **information** on National Trails (especially for local visits) using a range of channels including television programmes, the Internet, printed leaflets and smartphone Apps. New visitors could also be encouraged by promoting opportunities to **eat and drink** near National Trails and by raising awareness of **public transport connections and parking**.



North Downs Way thatched cottage.

Conclusions and Forward Look

During 2013/14 we have focussed on establishing the new website which has required support from local Trail Partnerships in supplying essential data and other helpful information. By next year we will have a full year's figures of website usage which will allow for more thorough analysis. During 2014/15 further content will be added to the website along with new features, e.g. Halls of Fame and events calendars. We hope these enhancements and the sites growing popularity will encourage more businesses to use it, thereby contributing to the websites self-sustainability.

In 2013/14 Natural England, invested in installing a long-term monitoring network of automatic people counters and to supplement the data from these in 2014/15 we will be undertaking an on-site visitor survey. Findings from this work will be available for next year's annual report and will provide a robust and comparable baseline for future analysis.

Enhancement

Our underpinning management principle is to make constant improvements to the Trail and its associated routes and to contribute to the enhancement of the landscape, nature and historic features within the trail corridor. For 2013/14 our priority was to ensure a continuing high standard of ongoing maintenance, put in place robust monitoring systems and encourage Trail Partnerships to prioritise and develop plans for longer term improvements.

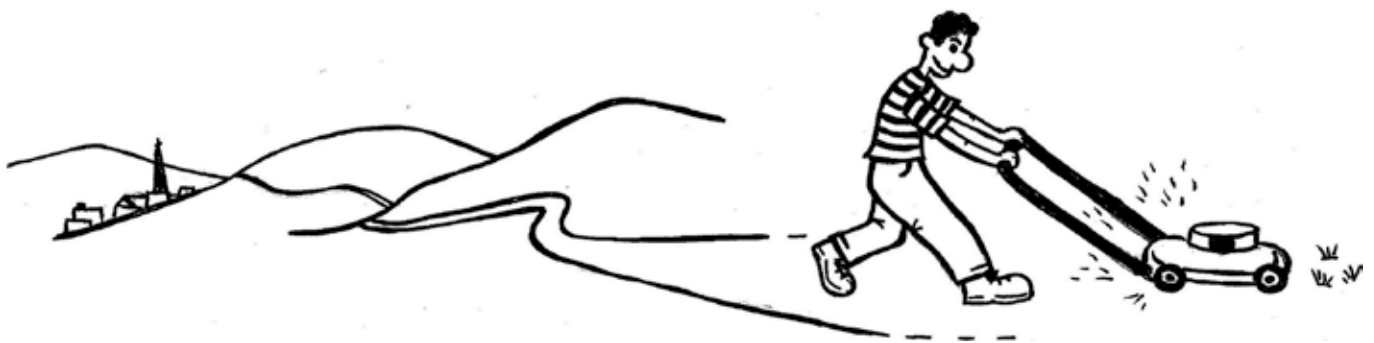
Key Performance Indicator: Trail Condition

Our ambition for National Trails is continually improving condition of the paths and associated structures (such as gates) and signage. Under the New Deal management and funding arrangements, Trail Partnerships have greater certainty about Natural England's financial contribution and local flexibility about how our grant is used to support upkeep of the routes. Rather than duplicate or impose a new methodology, our requirement is that each Trail Partnership must demonstrate to us that they have a rigorous method in place to monitor the condition of Trail infrastructure and track progress year on year. For 2013/14 the target we set was to have completed a baseline audit of Trail infrastructure and assessment of condition.

2013/14 Survey Results

Results from the audit completed in 2013/14 found that the National Trails together care for some 1864 miles (3000 km) of off road surfaces, 1411 stiles, 3708 gates, 790 bridges and 6967 finger posts.

During the year some 1567 miles (2522 km) of vegetation was cut back (approximately the equivalent of mowing and strimming from London to Istanbul) and some 40 miles (65 km) of scrub cleared (approximately the equivalent of chopping back undergrowth from London to Reading).



In spite of continued concerns about funding overall the local partnerships gave positive feedback about overall condition including:

Cotswold Way: 'in spite of challenges, with increased input from volunteers and a new trail partnership, quality standards have been maintained';

Hadrian's Wall: 'Calendar year 2013 saw periods of drying weather which, coupled with the Trail's maintenance regime, resulted in the October survey and November fixed point photography showing that the path surface and monument to be in a generally good condition.'

Monitoring

Each of the Trail Partnerships now has in place (or are very close to developing) a robust system for monitoring and reporting on condition of Trail infrastructure. Detailed methodologies vary according to the management needs of the Trails. For example on the Pennine Bridleway the Partnership commissioned a full professional audit and annual monitoring with hand-held data loggers linked to a Geological Information (GI) database. On the Cotswold Way, all the monitoring was undertaken by volunteers in accordance with guidance issued by the Trail Officer. Regular monitoring of surface condition is particularly important for the Hadrian's Wall Path given the fragility of the underlying monument and fixed point photography is analysed alongside metrological records to closely monitor changes.



Checking gates on the Yorkshire Wolds Way.

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

With this indicator we have asked Trail Partnerships to consider how they can develop the Trail alongside protecting or improving habitats or historic features associated with the route. Important **improvement projects** have been undertaken to the National Trails including on the Ridgeway where the longest flight of steps on the Trail at Whiteleaf Hill (Local Nature Reserve) were rebuilt. The Trail approaching the steps from either side was resurfaced and 157 new wooden steps, topped with limestone were built. This work was jointly funded by the local land manager (Chilterns Society).

Improvements have also been made to the Trail Corridor including on the Cleveland Way where action was taken in 2013/14 to protect the scheduled monument of a Bronze Age round hut site directly crossed by the Cleveland Way on Great Ayton Moor. This included the incorporation of a terram layer and additional aggregate. In addition the Coastal Officer for the North York Moors National park Authority is engaged in a Habitat Connectivity Project which has considerable benefits for the Trail Corridor and has included the establishment of small ponds alongside the Trail.



Flagstones being laid on Pen y Ghent.

During 2013/14 Natural England was able to fund a limited number of **additional capital improvement projects** on National Trails. This investment (totalling approximately £198,000 for five National Trails) enabled a speedy response to be provided to some of the problems caused by the exceptionally challenging weather during the winter period. A major improvement project was undertaken on the Pennine Way where the Yorkshire Dales National Park Ranger Service carried out work to provide a sustainable stone flagged surface along the severely eroded path on Pen y Ghent. The flagstones (which were reclaimed from demolished mills) were airlifted onto site and then laid by excavator. The works were captured by the contractor using time lapse photography illustrating the practical challenges of doing this scale of work in the uplands.

<http://youtube/k9GB1FoFnFo>

Over the year we also provided £175,000 to support 3 National Trails (South West Coast Path, Thames Path and Pennine Bridleway) to make progress in resolving some **outstanding establishment works** on particularly challenging sections.



The Finished Product.

Key Indicator: Improvements to accessibility

All of the Trails aspire to increase accessibility to enable as many people as possible to enjoy them. One way of improving accessibility to stretches of Trail is to remove physical obstructions such as stiles. Several of the Trails have ongoing programmes to replace stiles with more accessible alternatives (where appropriate), for example the South Downs Way Trail Partnership reported that Surrey is now stile free and the Offa's Dyke Path Partnership reported that the total number of stiles on the route is now fewer than 400 from their baseline (in 2007) of over 740. For Yorkshire Wolds Way, the Trail Partnership is well on their way to achieving their ambition to be stile free by 2015.

Further evidence of the Trail Partnerships working to increase accessibility is demonstrated by the number actively promoting a wider range of circular walks. For example the Cotswold Way, Cleveland Way and Yorkshire Wolds Way have all made efforts to ensure that all circular walks associated with the Trails are accurately loaded onto the website making full use of the map-based interactivity.



Off - Road Mobility Scooter on the Cotswold Way.

The Cotswold Way also reported that the use of the 'for-hire off-road mobility scooter' has doubled due to increased publicity, and continues to be funded by a partnership of the Cotswold Way, Gloucestershire County Council and Countryside Mobility South West.

South West Coast Path reported that, through their Rural Development Programme England (RDPE) supported 'Unlocking our Coastal Heritage' project, 56 projects have been undertaken to improve the accessibility of the South West Coast Path, and 39 routes audited and uploaded on the Fieldfare Trust's Phototrails website.

Conclusions and Forward Look

During 2013/14 all of the National Trails have continued to invest in maintaining the core infrastructure to the high standards expected. **Our target is that condition on each National Trail should be improving year on year or a minimum of 95% in good condition.** Many of the Trail Partnerships have demonstrated how they have gone beyond routine maintenance of the path and worked with others on projects to protect and enhance features associated with the route and we hope to see more examples of innovative projects in the coming years.

Engagement

Our underpinning management principle is to **build and sustain a community of interest in caring for the Trail and the landscape through which it passes**. For 2013/14 our priority was to get local authorities talking to each other and start to think about how they can facilitate involvement from a wider range of interest groups.

Key Performance Indicator: Effective Partnerships

Our Key Performance Indicator for the engagement part of the Quality Standards is effective partnerships. Trail Partnerships must demonstrate they have a suitable Delivery Framework in place that meets our minimum qualifying requirements and show how they are making progress towards achieving objectives relating to good partnership working. Delivery Frameworks are individually tailored to meet the needs of the Trail and each Trail Partnership has had the opportunity to consider the best arrangements for their circumstances – in some cases confirming existing arrangements but in many cases changing and evolving.

By April 2014, **Delivery Frameworks had been agreed** for 8 of the 13 National Trails in England. For 7 of these (Cotswold Way, Offa's Dyke, Peddars Way/Norfolk Coast Path, South Downs Way, South West Coast Path, Cleveland Way and Yorkshire Wolds Way) there has been no change in terms of the lead partner and the emphasis has been on putting in place the structures and mechanisms to ensure all partners have the opportunity to engage. Our minimum requirement for the Trail Partnerships was that all of the Highway Authorities were engaged and supportive. However our ambition in the New Deal was for the Trail Partnerships to ensure that a wider variety of stakeholders were able to engage. The Cotswold Way for example has established a broader Cotswolds Trails and Access Partnership chaired by one of the voluntary wardens, whilst the Cleveland Way and Yorkshire Wolds Way have taken the opportunity to improve the oversight of both Trails by supporting a wider 'virtual' on line partnership.

In the case of the North Downs Way, whilst the host authority remains Kent County Council, the lead partner is now the Kent Downs Area of Outstanding Natural Beauty (AONB) and the former Steering Group has transformed into the Trail Partnership. Nick Johannsen, the Director of the Kent Downs AONB unit and Chairman of the Trail Partnership explains;

'The New Deal has been an opportunity to reflect on the way that the North Downs Way Steering Group has operated and to examine the ways in which it could work better and become more outward looking and consultative. The Kent Downs AONB is now the Lead Partner for the North Downs Way Trail Partnership and through the establishment of a stakeholder group we are committed to encouraging those with an interest in the Trail and its wider corridor to have a louder voice in helping to shape its future'

The other five National Trails (Hadrian's Wall, Pennine Bridleway, Pennine Way, Thames Path and The Ridgeway) have all made considerable progress to agreeing Delivery Frameworks and we are confident that new arrangements will be in place by March 2015. For example, work to develop a new, expanded partnership for the Ridgeway is now underway, including the Chilterns Conservation Board, the North Wessex Downs AONB and the Friends of the Ridgeway.

This will replace the previous arrangement that involved a joint management group for The Ridgeway and Thames Path outside of London, and for the first time in many years we hope that a Delivery Framework for the whole of the Thames Path can be agreed.

Key Indicator: Level and type of engagement/voluntary participation

All of the established Trail Partnerships have sought to engage a wider group of stakeholders. The mechanisms of engagement vary according to local circumstances. For example the Cleveland Way/Yorkshire Wolds Way Trail Partnership reported that workshops have now been held with the wider Partnership as a first stage of development of the new Plan. These were well attended by a diverse group, including landowning/managing interests, B&B and campsite owners, Trail Managers, user representatives, community groups and Tourism Managers. Some partnerships have formalised their membership to include specific representatives for users, land owners, tourism and business. Others are looking to develop engagement through wider forums or by guest invitation to specific meetings. With respect to the South Downs Way, the South Downs Local Access Forum are invited to all Trail Partnership meetings where they have an opportunity to make representations based on matters raised at their regular meetings. The views of the South Downs Society and South Downs Land Managers Group are also sought on specific issues and they are made aware of opportunities to engage with the Trail Partnership via its quarterly meetings.

One of the objectives we set for Trail Partnerships is to add value through cross working with wider local strategic initiatives. Examples include;

- The South West Coast Path and the broader 'Unlocking our Coastal Heritage' project.
- The North Downs Way working with the Securing the Landscape Partnership. This partnership encompasses a very broad range of organisations including large commercial businesses such as Lafarge Tarmac, along with local authorities, smaller landowners, user groups and enforcement agencies such as the Kent Police.
- Offa's Dyke and the Walking with Offa programme, the membership of which includes Tourism Partnerships, Destination Management organisations and relevant LEADER Local Action Groups.
- The Thames Path team works closely with the Environment Agency and the River Thames Society (a voluntary organisation involved in protecting and promoting the use of the river).



Skinningrove revetment and step work.

The River Thames Society awarded the Trail volunteers the River Thames Society Shield for 2013 for their significant contribution to the life and wellbeing of the river.

The South Downs Way reported that nearly 300 person days of volunteer time was recorded in support of the Trail during 2013/14.

All of the National Trails benefit to a greater or lesser extent from support from a wide range of **volunteers**. One of many good examples is the Thames Path and Ridgeway who have some 350 volunteers undertaking practical tasks, running workshops and training sessions and regularly inspecting the routes.

On the North Downs Way, the work to remove the remaining 2 stiles and replace with kissing gates in Surrey was undertaken by volunteers from the Surrey Ramblers who also carried out several vegetation clearance projects opening up sections to improve views and user experience.

Some of the local partnerships have attempted to evaluate the economic contribution of the work of their volunteers. Although there is no agreed way for doing this, the Cotswolds Way, for example, estimated volunteer input as being equivalent to some £30,000 of additional funding during 2013/14.

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

In undertaking works on the National Trails, the Trail Partnerships work closely with any affected land managers to implement solutions that are mutually beneficial and/or to minimise any impact on their operations. On the South Downs Way routine Trail maintenance in the form of replacement of bridleway gates and surface improvements provides benefits to land managers in terms of improved stock proofing and access. South Downs Way staff have worked to support local land managers where they want to diversify their business and this has included support for the development of a small campsite using information obtained from people counters.

In addition several Trail Partnerships have used the opportunity provided by the new website to help promote businesses owned by local landowners. Examples on the Cleveland Way include High Paradise Tea Rooms and Lord Stones Café and camping – where the Trail passes nearby.

Conclusions and Forward Look

Many of the managing authorities have invested a significant amount of time in the development of the new Trail Partnerships.

'One of the benefits of the review was the bringing together of the previously separate partnerships for the Cleveland Way and Yorkshire Wolds Way National Trails. We have of course taken care to avoid simply creating another tier of management and meetings and have succeeded in doing this. The new partnership promises to make it easier in future to share expertise and best practice across the two Trails and it should enable us to better direct resources to where the need is greatest.'
Richard Gunton (North York Moors National Park and Chair).

Volunteers are vital to the success of National Trails and we hope to work with Trail Partnerships to better record the full range and value of their contribution across the National Trails family.

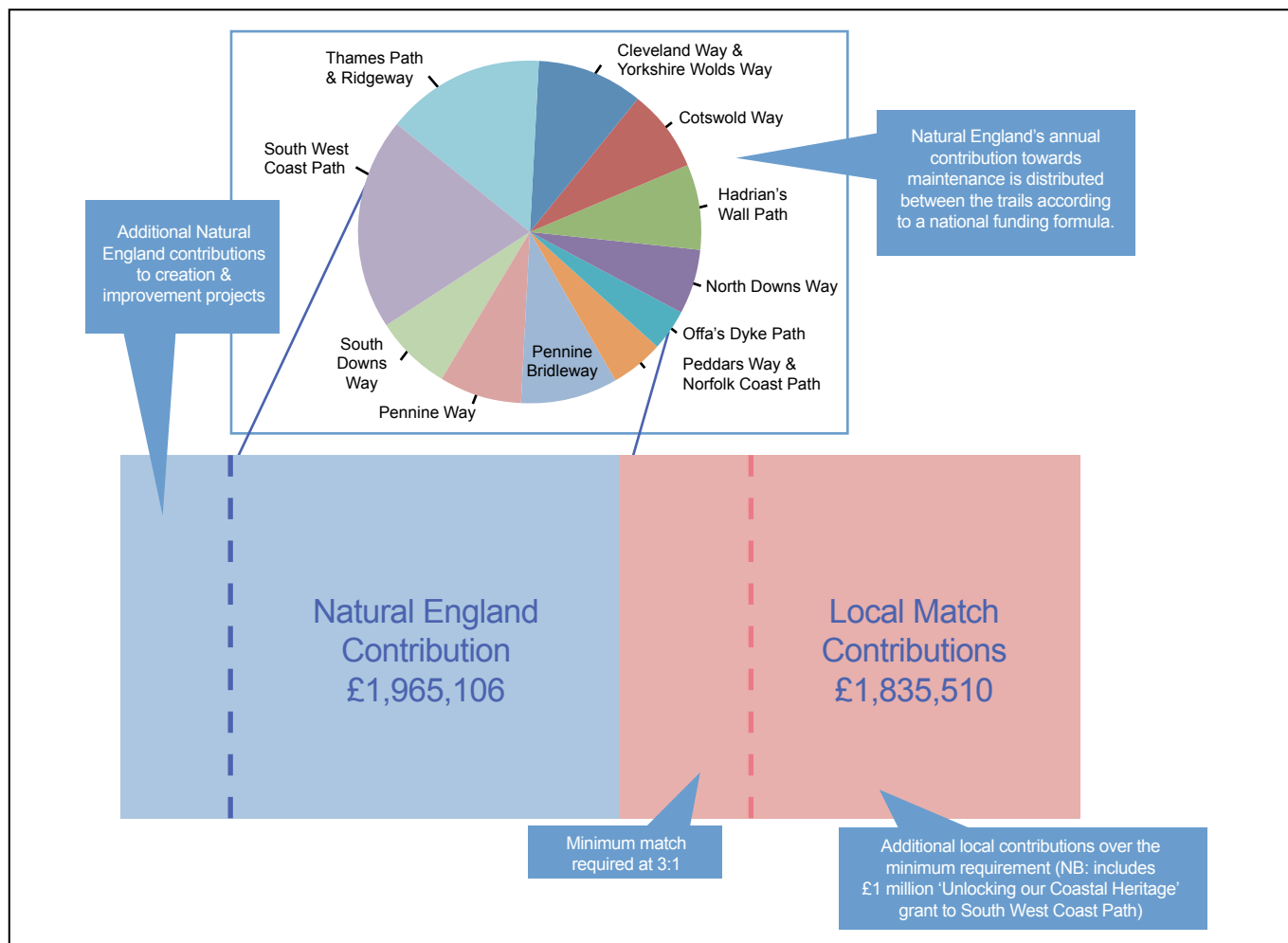
Economy

Our underpinning management principle is to **create opportunities for local businesses to benefit from use of National Trails**. During 2013/14 our priority has been to secure core investment and explore with Trail Partnerships the ways that local economies benefit from the routes.

There is a distinction to be drawn between evidence of financial investment in the National Trails themselves, and financial benefits that flow to the areas through which the National Trails pass – potentially as a result of the presence and use of the Trail.

Investment in National Trails 2013/14

The total investment in National Trails during the period was some £3.8 million with Natural England's contribution being matched almost pound for pound (see diagram overleaf). Although there is no Key Performance Indicator, we do, as a condition of grant, require all Trail Partnerships to evidence that they match our contribution at a ratio of at least 1:3. The illustration below clearly demonstrates that the Trails have exceeded our requirement for match funding. Much of this support has come from the Highway Authorities but in addition to the significant investment received by the South West Coast Path (and also Offa's Dyke Path) from RDPE funding, there are examples where the additional investment has come from other sources. For example Thames Path and Ridgeway raised £6,263 through a trading company from the sale of merchandise. The South Downs Way has negotiated a payback scheme with organisers of events that use the Trail, such as challenge runs, where a fee is charged with a target of £1 per participant from future events being donated to the National Trail. In 2013 there were over 15,000 participants taking part in a number of organised events along the South Downs Way and the Trail has a target of raising up to £10,000 pa from this scheme in future.



Key Indicator: Benefit to the Local Economy

It is clear that the areas through which the National Trails pass benefit economically. Many local partnerships use local information on usage to estimate potential income through **tourism**. The South West Coast Path reported that in 2012 walkers were estimated to have spent £436 million supporting 9771 full time equivalent jobs (a 14% increase on 2010 baseline) They are currently awaiting confirmed visitor figures for 2013 to do a further comparable calculation.

There is anecdotal evidence about the impact National Trail users have on **accommodation providers and local businesses** including baggage handling services expanding their service provision and/or promoting themselves through the National Trails. For example on the Yorkshire Wolds Way – Ryedale Taxis are keen to promote the opportunities that they offer to move both people and baggage along the trail using the new website. On Peddars Way/Norfolk Coast Path – a new baggage handling business has been created on the National Trail. The Hadrian's Wall Path reported that an owner of one of the top local walking firms had described the last year as 'just amazing' and that he needed to take on more staff to cope with demand.



A walking group enjoying refreshments in a tea room on a National Trail.

The importance of National Trails to the local economy was highlighted when due to tidal surges in December the flood bank was breached in 23 places on a stretch of the Norfolk Coast Path near Blakeney and had to be closed for walkers. Given the number of walkers that used the Trail the local economic impact was instantly recognised as being significant and a drop-in session for businesses and local residents was organised by the local authorities and other interested parties including Natural England and the Environment Agency. Options for repairing this section of National Trail were proposed resulting in an overriding consensus to support an option that enabled this section to be repaired and re-opened in as short a timeframe as possible. Following this meeting the managing authorities acted to ensure that this stretch was re-opened in time for the start of the Spring tourist season.

Further evidence of local economic benefit is **use of local contractors and through the common practice of sourcing materials from the local area**. Stone laying works on the Offa's Dyke Path at Hatterall Ridge were carried out by local farmer/graziers sons. This work supplements farm income and means that they are able to continue to work and live locally.

All signage and gate posts used on the South Downs Way are sourced from local estates and manufactured locally.



Stone Laying works on the Offa's Dyke Path.

Finally there is strong evidence of the recognition of the value of National Trails to tourism from the Tourism Sector as illustrated by the South West Coast Path being awarded the 'Outstanding contribution to tourism' award at the SW England Tourism Excellence Awards.

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

We want to help local businesses benefit from the route and this indicator encourages Trail Partnerships to talk to local tourism business, get feedback from them about management of the route and discuss opportunities to work together. A demonstration of the value to local businesses is the substantial work undertaken on the South West Coast Path to repair storm damage, with a mix of funding from Natural England, Rural Development Programme England (RDPE), local authorities and donations from individuals and local businesses generated by the South West Coast Path Association.

The community led organisation Walkers are Welcome aims to attract more visitors to member towns by offering high quality walking opportunities. It probably isn't a coincidence that 28% of the current 113 member towns are on a National Trail.

A quote from a member town reflects this situation: *"When we considered applying for Walkers are Welcome accreditation, we soon realised that the town's best asset was the National Trail running through the town."*

Conclusion and Forward Look

There is increasing evidence from the website of accommodation and service providers adding information that illustrates the importance they place on the users of National Trails. On the North Downs Way, Visit Kent have populated the website with a comprehensive and up to date searchable database of some 300 accommodation providers in order to enhance their impact. By next year we should be in a position to provide further analysis of each of the individual sites.

Natural England recognise that there is a need for more robust evidence to clearly show the economic benefit and impact of National Trails and plan therefore to work with Trail Partnerships and national stakeholders to provide further guidance and use the data from our people counters and visitor survey to provide a more comprehensive baseline of information going forward.

Our performance in 2013/14

Natural England has a key role to play in realising the benefits of National Trails. We are a national champion and advocate for the National Trails and as well as setting standards and providing funding we maintain an overview of delivery across all National Trails which includes publishing this annual report.

During 2013/14 we:

- Secured a new partner to promote the family of National Trails and deliver a fresh new website with interactive mapping and facilities for local businesses and to reach out to a wider audience of Trail users.
- Contributed £1.67 million towards Trail upkeep and worked with local partners to establish a baseline assessment of Trail condition for future monitoring.
- Provided £373,000 of additional resources that has helped National Trails respond to exceptional weather and make substantial progress to resolve long-standing creation issues.
- Supported partners to develop their local delivery frameworks enabling the establishment of Trail Partnerships for 8 of the 13 National Trails and made substantial progress to improve engagement and collaboration for the others.
- Built on the evidence base to demonstrate the benefits of investing in National Trails, including: gathering information about people's awareness of the National Trails; installing new people counters; and exploratory work using geographic information to map a visual corridor for National Trails. This will be supplemented by an onsite visitor survey carried out in 2014/15.

Working together

In May 2014 we invited representatives from the new Trail Partnerships to join us in Birmingham to reflect on the first year of the New Deal arrangements and discuss priorities for future years. A number of workshops took place during the day and partners discussed a wide range of ideas including ways to improve user experience, make best use of new technology, work with local businesses, improve accessibility and attract new funding. Delegates also discussed improving how we measure and report on the value of National Trails, including the contribution of volunteers and more robust evidence of the economic benefit. Feedback from the event showed that partners value being part of the National Trails family and we will be organising another opportunity for representatives of Trail Partnerships to get together early in 2015.



Trail Partnerships meeting.

Next steps

Our focus during 2013/14 has been on working with partners to develop their local delivery frameworks and National Trail ambitions. Looking forwards, we will continue to work nationally to support the local Trail Partnerships by facilitating working together and sharing best practice and by improving the evidence base to demonstrate and showcase their achievements. As more of the England Coast Path is created it will increasingly feature in these reports. In 2015/16, we will honour our commitment to review the effectiveness of the New Deal funding arrangements.

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