



# Port of Milford Haven

delivering port infrastructure and services

## Stakeholder Perception Survey 2019



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## Executive Summary

This stakeholder perception survey is the sixth survey conducted by Pembrokeshire Coastal Forum (PCF) for the Port of Milford Haven (POMH). This survey was similar to the one used in 2018 with a few minor edits made by the Port, and this report draws comparisons between this year's data and that of 2018. The survey was marketed to a broad range of stakeholders from local community members, business owners, Port customers, suppliers and statutory bodies. In total 362 people took part.

Overall the results of this survey give a positive view of the Port of Milford Haven, the majority of respondents agreed that the Port should be undertaking a range of different activities, particularly that they should be acting as a regional champion to help attract new trade and investment to Pembrokeshire.

The role of the Port within the local community continues to be of vital importance with 95% of respondents in agreement that the Port should continue its work in supporting the local community and local community organisations.

The Port's work in managing the safe movement of vessels on the Milford Haven Waterway was recognised and 77% ranked this as the Port's number one priority.

When asked how the Port was performing against their overall expectations 76% of respondents responded positively.

## Contents

Executive Summary .....	3
1. Introduction .....	5
2. Methodology .....	6
3. Survey Results .....	7
3.1 About the Respondents .....	7
3.2 The Work of the Port .....	9
3.3 The Port and the Community .....	10
3.4 The Port's Priorities and Performance .....	11
3.5 Communication .....	13
4. Conclusion .....	14
5. Appendices .....	15

## 1. Introduction

2019 marks the sixth stakeholder survey Pembrokeshire Coastal Forum (PCF) has carried out for the Port of Milford Haven. As a Trust Port, POMH regularly seeks the views and concerns of its stakeholders through its Advisory Board, its Annual Stakeholder Meeting, its Stakeholder Accountability Committee and various one to one meetings throughout the annual calendar. These views are taken into consideration when planning future strategies and in decision making.

In 2018 the survey was completed by 430 people and the results gave an overall positive view of the Port of Milford Haven. The majority of respondents agreed that the Port should be undertaking a range of different activities, particularly that they should be investing in a way that creates new economic opportunities and attracting new trade and investment. The role of the Port within the local community was seen to be of vital importance with 95% of respondents in agreement that the Port should continue its community work and 86% of people feel it is important that the Port should continue to be a Trust Port. There was an increase of those that said the Port was meeting or exceeding their expectations compared to 2017.

The aim of this 2019 survey is to measure whether the positivity reflected in 2018 has continued and the questions were designed to gather opinions on matters such as how the Port operates, how it is performing in its duties, and what, in the opinion of its stakeholders, it should be prioritising. This report will outline the results of the survey and will draw comparisons to 2018 throughout.

## 2. Methodology

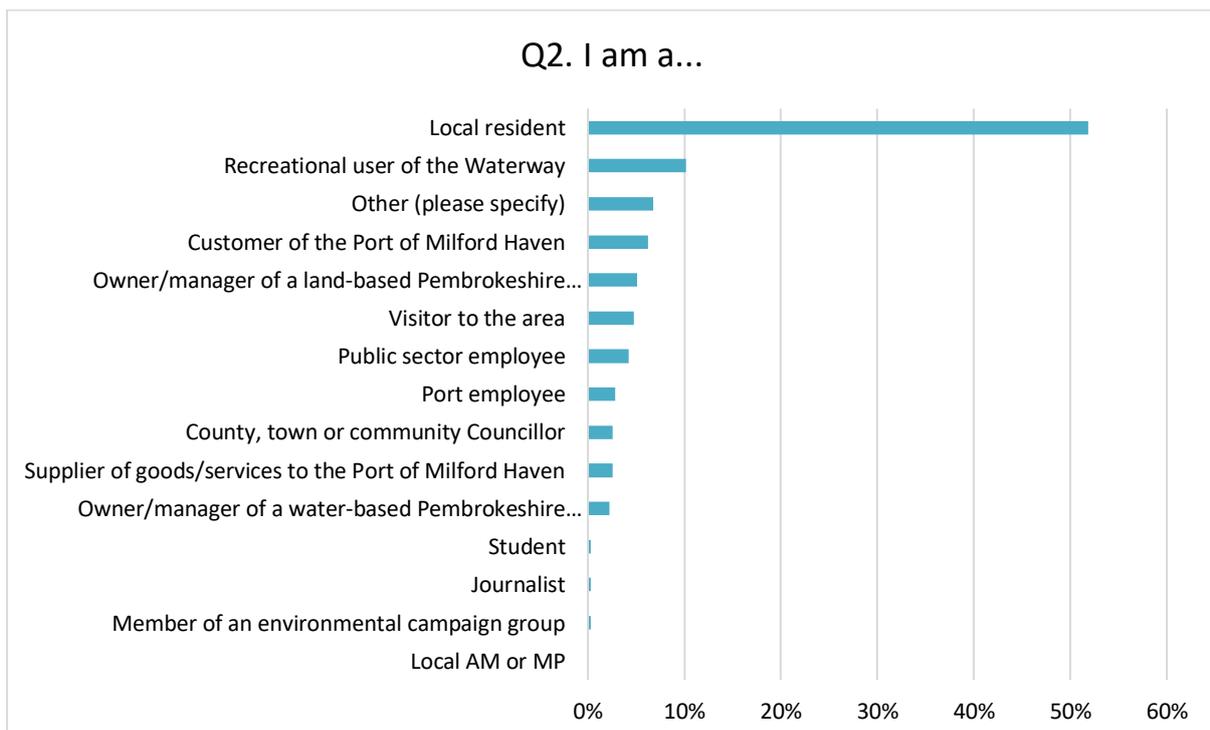
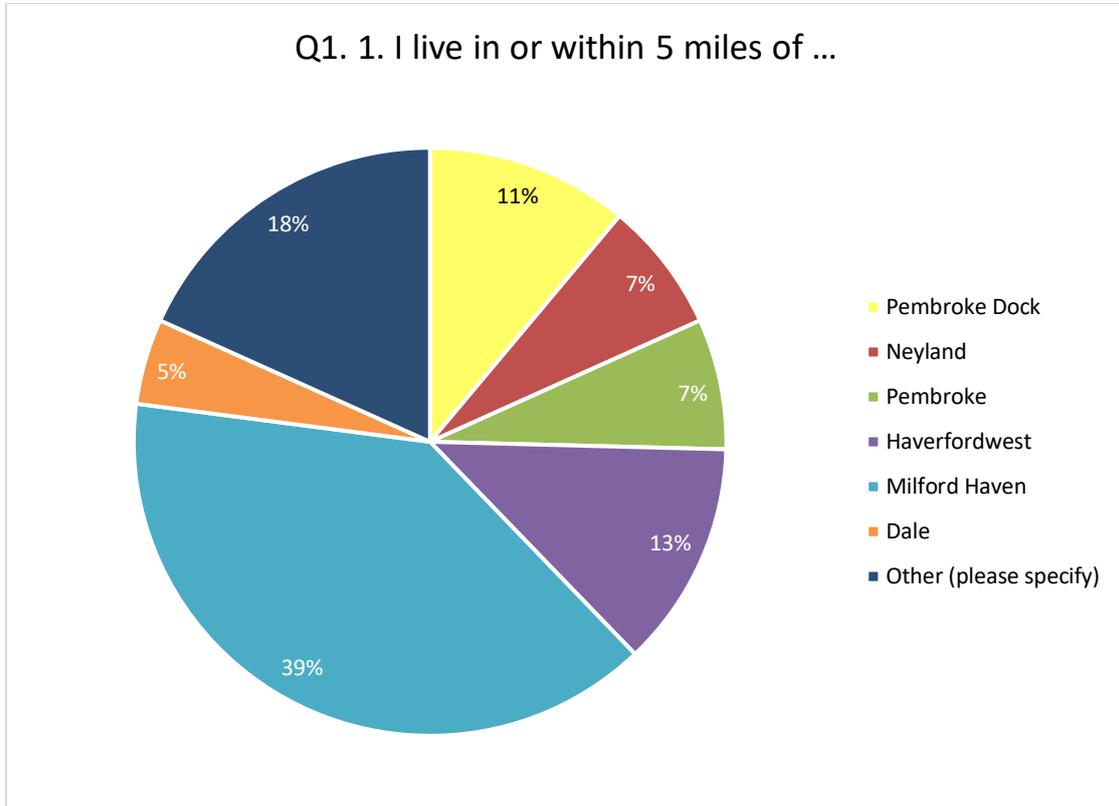
PCF was asked by the Port of Milford Haven to promote, analyse and report on this 2019 survey. The Port provided the survey questions and a list of defined stakeholder categories. PCF were asked to use their contacts and networks to identify a list of individuals to contact within each category, many of whom completed the survey in 2018. The Port also provided a contact list of individuals to contact. Those targeted included local residents, local business owners, Town & Community Councillors, schools, government officials, Port customers and suppliers, among others.

The survey was created online using [www.surveymonkey.com](http://www.surveymonkey.com) and individuals identified within the stakeholder categories were all personally contacted and asked to complete the survey. The link to the online survey was also posted on PCF's social media (Facebook, Twitter and LinkedIn), on the PCF website and in the PCF e-newsletter. The Port of Milford Haven also shared several social media posts promoting the survey. The survey was emailed to several of PCF databases: PCF members, Marine Energy Wales members and Pembrokeshire Outdoor Charter members. £100 worth of vouchers to be spent at a Milford Waterfront retailer, restaurant or café was offered as an incentive. The survey was open between 15<sup>th</sup> July and 2<sup>nd</sup> August 2019. During this time it was completed by 362 people which is a 16% decrease compared to last year, most likely because the survey was open for one week less in 2019.

The survey results were then analysed and are presented in this report. All figures in this report have been rounded to the nearest whole number. The full datasets can be found in Appendix B.

### 3. Survey Results

#### 3.1 About the Respondents



This year's survey drew responses from people in a range of geographical locations but the majority lived in or near Milford Haven. 18% lived in "other" locations which included:

- Angle
- Broad Haven
- Burton Ferry
- Cardiff
- Fishguard
- Lawrenny
- Llanstadwell
- Maenclochog
- Mid Glamorgan
- Nantgarw
- Narberth
- Newcastle Emlyn
- Newgale
- Newport
- Newtown
- Port Talbot
- Saundersfoot
- St. Davids
- St. Clears
- Swansea
- Tenby
- Wiston

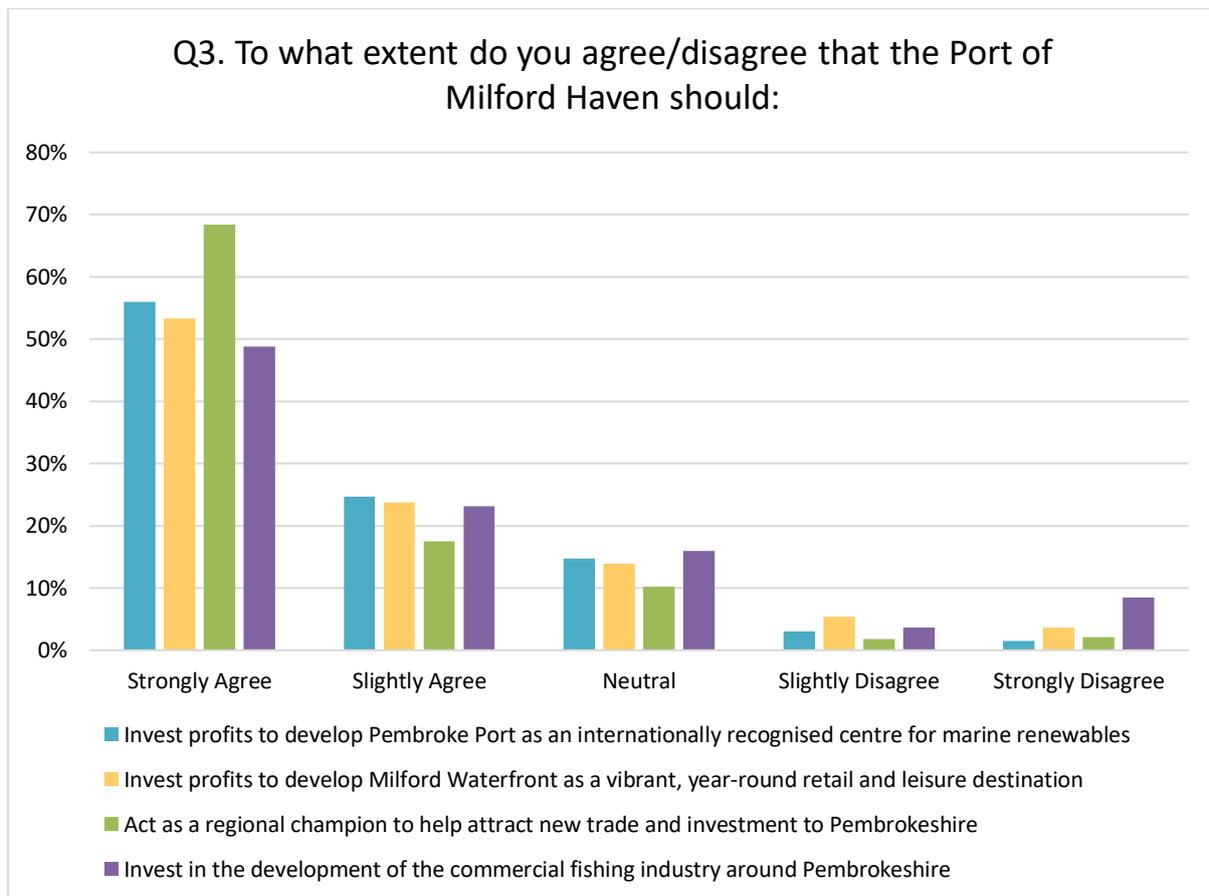
There were also responses from people based outside of Wales including:

- Buckinghamshire
- Chesterfield, Derbyshire
- Cumbria
- Ireland
- Manchester
- Portishead
- Sønderborg
- USA
- Worcester

52% of people defined themselves as a local resident, which is a 15% increase compared to 2018. 10% were recreational users of the Haven Waterway (6% decrease from last year) and 7% defined themselves as "other" – these responses included:

- Annual Berth Holder Milford Marina
- Boat owner
- Customer and Supplier
- Geology fieldwork tutor
- Holiday home owner
- Former town and county Councillor
- Interested party
- Local resident & MHPA customer & recreational user of waterway
- Local tug master
- Port Officer, Fishermen's Mission
- Ships Agent
- Puma
- Trade Association
- Trainee Solicitor

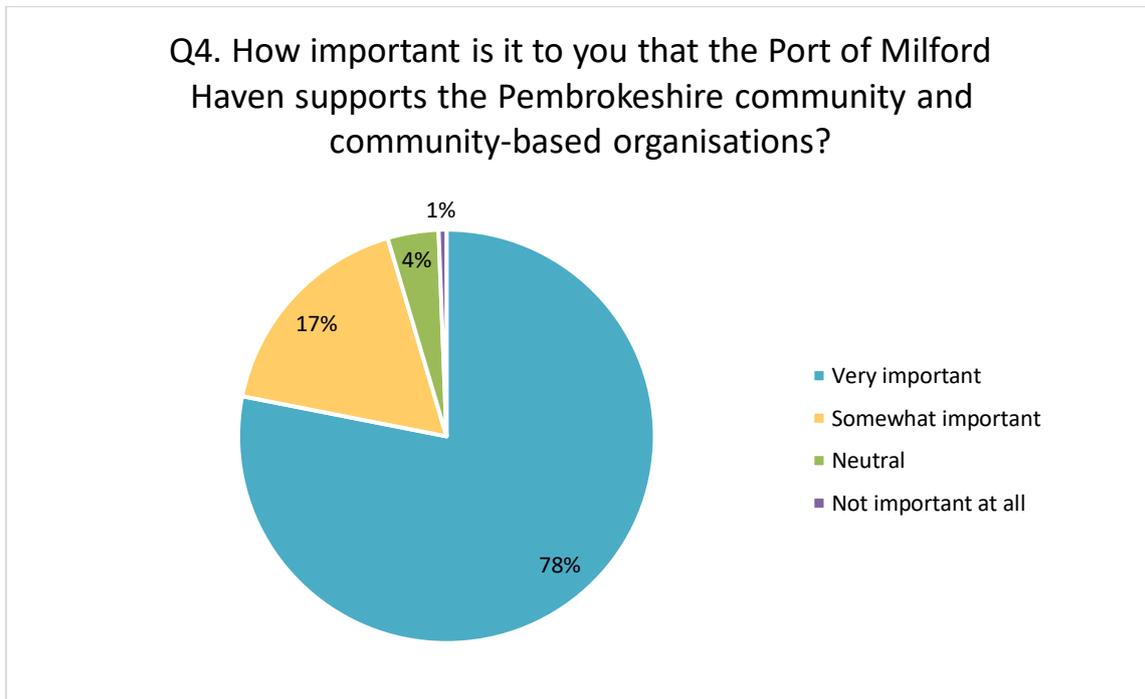
### 3.2 The Work of the Port



The majority of those completing this survey agreed that the Port should be undertaking the activities outlined in the graph above. Compared to 2018 results, the amount of people agreeing (strongly, slightly or neutral) that the Port should be investing profits in marine renewables, Milford Waterfront and acting as a regional champion for new trade and investment have all increased by 1%. There has been a 3% decrease in the amount of people believing the Port should be investing in the commercial fishing industry.

Over 50% of respondents strongly agreed that the Port should be investing in marine renewable, Milford Waterfront and acting as a regional champion to attract new trade and investment. This final category received significantly higher support than the others, as demonstrated in the graph above. Investing in the commercial fishing industry received the least amount of support overall with 12% of respondents disagreeing either slightly or strongly.

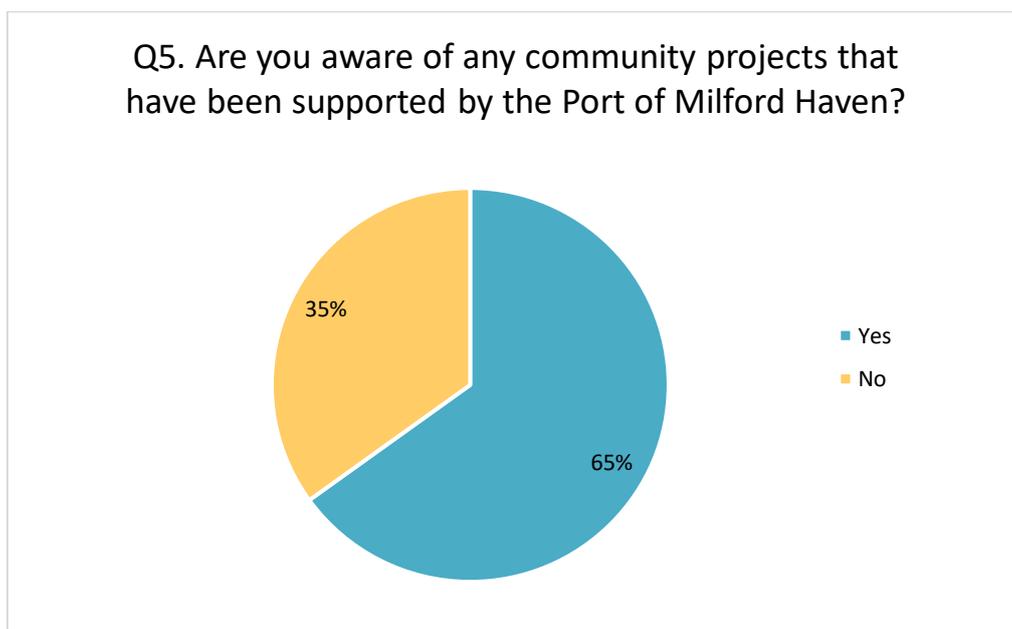
### 3.3 The Port and the Community



For Q4, respondents were provided with a description of what it means to be a Trust Port, the benefits this provides and the ways in which the Port is able to support local businesses and communities as a result of its Trust Port status.

95% said that the Port's support for the local community was important (either very or somewhat), a 10% increase from 2018. Only 1% said that this wasn't important.

They were then asked in Q5 whether they were aware of any community projects that have been supported by the Port, to which 65% replied yes. This is exactly the same result as 2018.

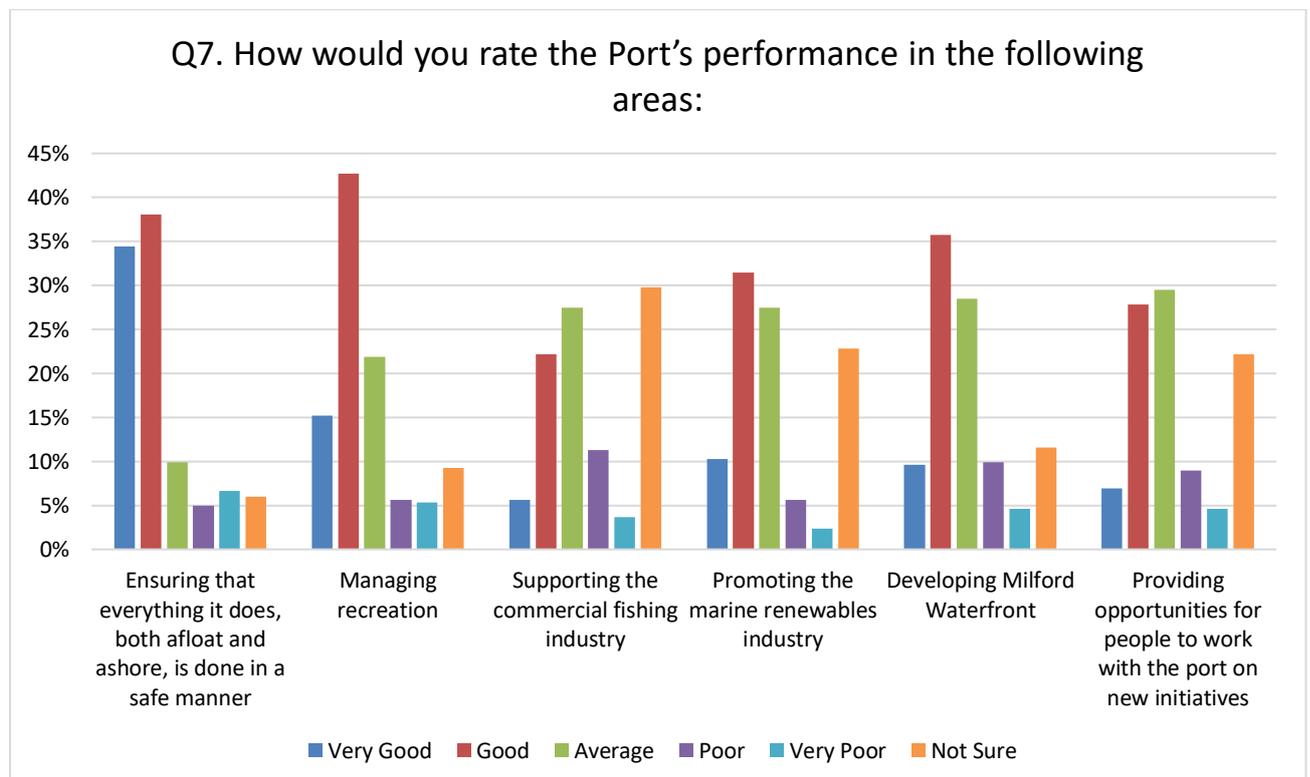


### 3.4 The Port's Priorities and Performance

Q6 asked respondents to place six of the Port's activities in order of priority, according to their views. To analyse the data, each time an activity was ranked 1<sup>st</sup> it was awarded six points, five points for 2<sup>nd</sup>, four for 3<sup>rd</sup> etc. The list below is the ranked order of priorities when an average was taken for these scores (the average score is shown in brackets, six being the maximum that could have been scored).

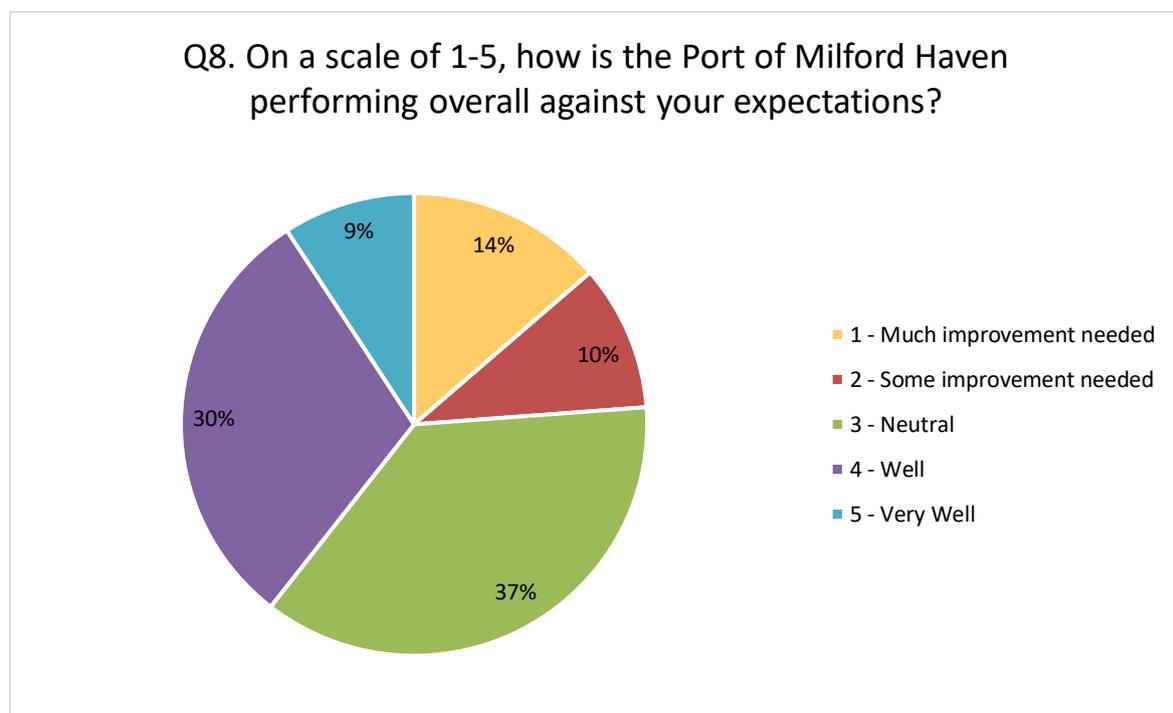
1. Ensure the safe movement of vessels on the Milford Haven Waterway (5.4)
2. Collaborate with others on new initiatives that bring benefits to Pembrokeshire (3.47)
3. Manage recreation on the Milford Haven Waterway (3.27)
4. Invest profits to promote the marine renewables industry in Pembrokeshire (3.1)
5. Support the commercial fishing industry around Pembrokeshire (3.04)
6. Invest profits to make Milford Waterfront a leading retail and leisure destination (2.72)

The answer options for this question changed for this year's survey and so it is not possible to compare to 2018 results, except that ensuring the safe movement of vessels tops the list both years. 77% of people taking this survey put this answer as the number one priority for the Port. There is very little between the remaining options as they all scored very closely. 28% of respondents placed 'investing profits into Milford Waterfront' as the lowest priority.



Q7 asked respondents to rate the Port’s performance in a number of key areas. Overall every activity received a positive rating from the majority of respondents – at least 50% ranked all the activities as either very good, good or average. 82% rated the Port’s work in safety positively (a 6% decrease compared to last year, although the question was rephrased this year. In 2018 they were asked about the Port’s work in ensuring the safe movement of vessels, whereas in 2019 it covered all Port activities). 55% of people rated the Port’s work in supporting the commercial fishing industry positively, with 30% saying they were not sure of this – the highest percentage across all the categories. This is reflected in the 2018 results.

When comparing this question to the 2018 results there has been very little change across many of the categories. The biggest change is for Milford Waterfront – 74% rated the Port’s work in developing this as either very good, good or average, a 6% increase from last year. The number of people not sure about the Port’s performance has decreased for every activity since 2018.

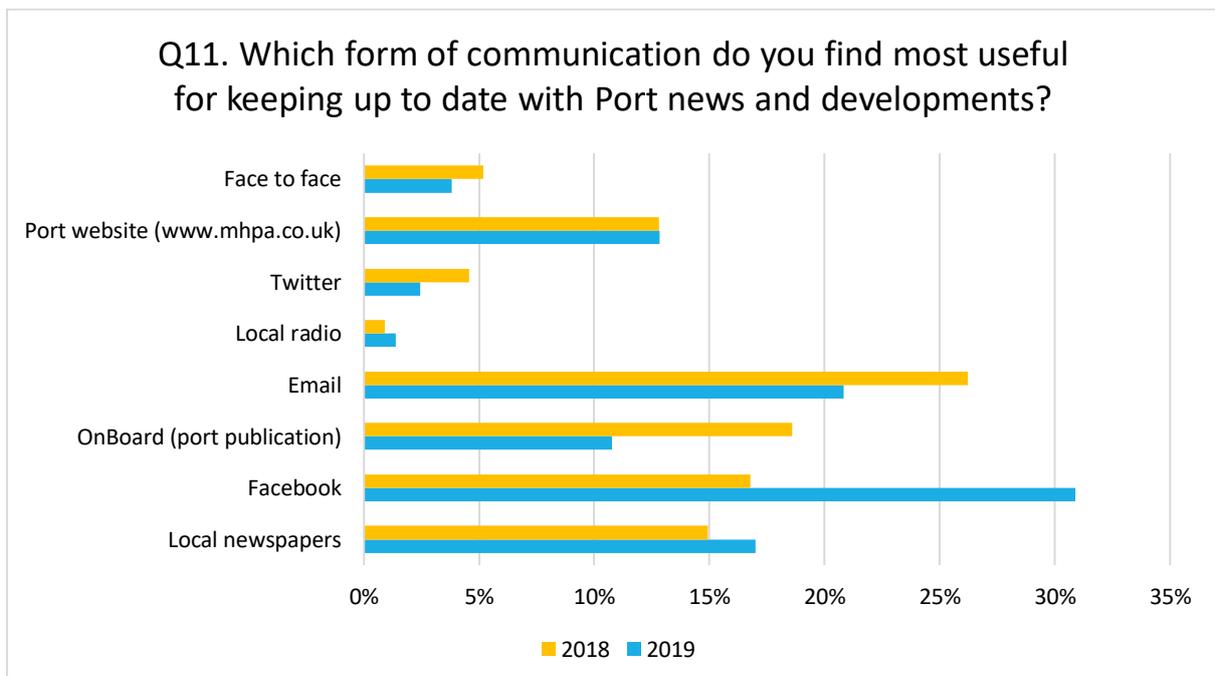
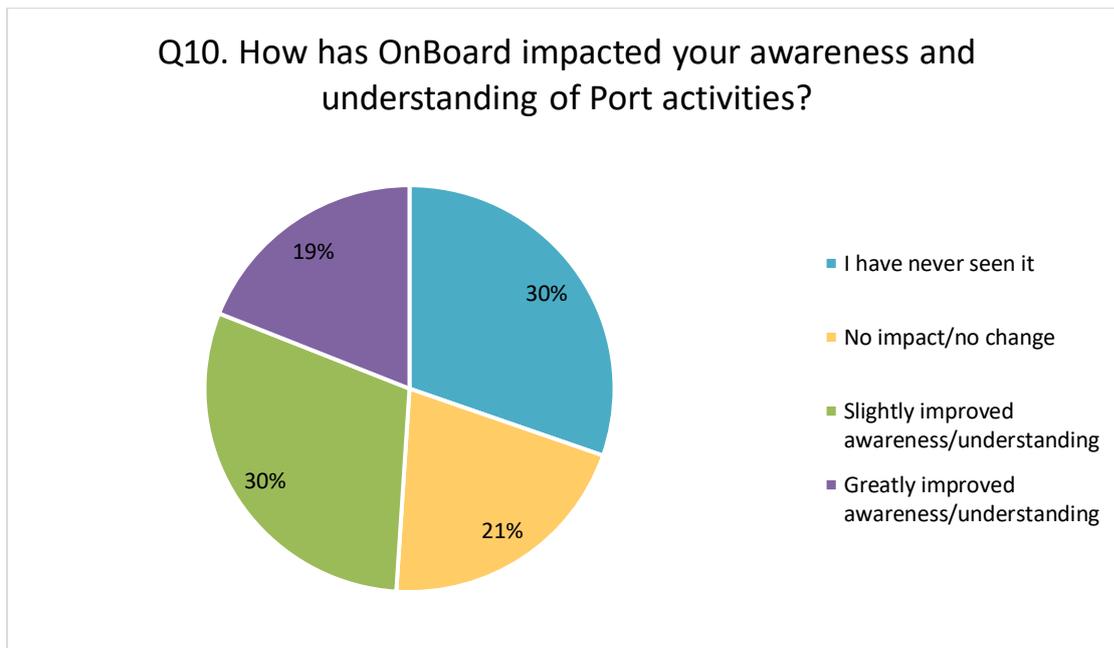


Q8 asked respondents how the Port was performing overall against their expectations. 76% of people taking this survey responded positively, with an answer of either very well, well or neutral. This is a 9% decrease from 2018.

When asked in Q9 if they had any concerns regarding the Port’s activities, 48% said yes – and 18% increase from 2018. Of the people that said yes, 100% left a comment in the comments box. The most common themes from these comments include the flooding issue at Lower Priory (24% of comments referred to this), the development of Milford Waterfront (11%) and waste disposal at Pembroke Port (10%). A full list of these answers can be found in Appendix A.

### 3.5 Communication

Q10 gave respondents a description of the OnBoard publication and asked whether it had impacted their awareness and understanding of the Port. 49% responded positively, which is a 1% increase compared to 2018. There has been a 5% reduction in the amount of people that have never seen OnBoard since 2018.



Q12 asked respondents which form of communication they find most useful for keeping up to date with Port news and developments. The graph above shows that Facebook has doubled in popularity

from 17% in 2018 to 31% in 2019. Email has seen a reduction in popularity from 2018 but is still the second most preferred method of communication, followed by local newspapers which has seen an increase in popularity this year. There is an 8% decrease in the amount of people preferring to get their Port related news from the OnBoard magazine.

## 4. Conclusion

This survey has given a positive overall view of the Port and its activities, which is comparable to the results from last year. Below is a summary of the results:

- Over 50% undertaking this survey were local residents and 82% lived in or near one of the major towns on the Haven Waterway, demonstrating the strong links between the Port and the local towns. There were also people participating in the survey from all over Pembrokeshire and further afield including outside of Wales (and even outside of the UK) which reflects the Port's far-reaching influence.
- The majority of respondents agreed that the Port should be undertaking a range of different activities, particularly that they should be acting as a regional champion to help attract new trade and investment to Pembrokeshire
- 95% said that the Port's support for the local community and local community organisations was important, a 10% increase from 2018. Only 1% said that this wasn't important at all.
- 65% were aware of community project supported by the Port – exactly the same as 2018.
- 77% of people taking this survey said that 'ensuring the safe movement of vessels on the Milford Haven Waterway' should be the Port's number one priority. 28% placed 'investing profits into Milford Waterfront' as the lowest priority.
- When asked to rate the Port's performance in a number of key areas at least 50% ranked all the activities as either very good, good or average. 82% rated the Port's work in safety positively. 74% rated the Port's work in developing Milford Waterfront as either very good, good or average, a 6% increase from last year. The number of people not sure about the port's performance has decreased for every activity since 2018.
- When asked how the Port was performing against their overall expectations 76% of respondents responded positively, which is a 9% decrease from last year.
- 48% said that they had concerns regarding the Port's activities. The most common themes from these comments include the flooding issue at Lower Priory, the development of Milford Waterfront and waste disposal at Pembroke Port.
- The OnBoard publication has seen a continuous rise in popularity with 49% stating that it had improved their awareness/understanding of the Port. Facebook is the most popular method of communication for the majority of people, which is a change from 2018 where email was the most popular.

## 5. Appendices

**Appendix A** - Full set of answers for Question 9: Do you have any concerns regarding any of the Port's activities?