
PORT OF MILFORD HAVEN STAKEHOLDER PERCEPTION SURVEY 2016



Port of Milford Haven

Report for the Port of Milford Haven

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Executive Summary

This stakeholder perception survey is the third survey conducted by the Pembrokeshire Coastal Forum (PCF) for the Port of Milford Haven (PoMH), and aims to build upon the findings from the reports written in 2009 and 2014. This 2016 survey was slightly different from the previous two as it was targeted to a much wider range of the Port's stakeholders, rather than immediate local communities. This included business owners, suppliers, customers and shipping agents. 254 people completed the survey.

The work of the Port was clearly defined by respondents with a vast majority strongly agreeing that the Port should be involved with the safe navigation of shipping and pollution prevention. In 2014, 72% agreed that the Port should have a role in environmental control and monitoring of the Waterway however in 2016 94% of respondents thought that Port should be actively working to prevent pollution. When asked what the Port's priorities should be, safe navigation of shipping and pollution prevention were again top of the list, similarly when asked to rate the Port's performance these activities were seen very positively.

The majority of respondents agreed that the Port should be taking part in a range of activities, and the order of priority for these varied for different stakeholder groups depending on their own interests. There were large percentages of respondents who were unsure of the Port's performance in areas outside of shipping and pollution prevention. The Port met the expectations of 50% of those completing this survey. There has been a huge increase in awareness of community projects supported by the Port, in both 2009 and 2014 only 25% respondents were aware of a Port-supported community project, whereas in 2016 this figure rose significantly to 75%.

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1. Introduction

In 2009 Pembrokeshire Coastal Forum (PCF) was asked to carry out a community perception study on behalf of the Port of Milford Haven (PoMH). 105 members of the public took part in the survey and the report concluded that the community seemed to only have a superficial level of awareness of the role of the Port. 5 years later PCF was asked to repeat the survey in the spring/summer of 2014, in order to enable a comparison of the results and to see whether any change was visible. This survey received 170 responses. The 2014 report gave an overall positive view of the Port and the work that it does, although found that there was still an element of confusion about its roles and activities outside of navigation and shipping safety. The deductions were similar to those found in 2009. Respondents clearly identified an awareness of the main roles of the Port with many positive views on how it carries out its main navigation and safety functions on the Waterway. However both reports highlighted the misconceptions about other areas of work that the Port is involved in.

In the spring of 2016 PCF were approached to undertake a third stakeholder perception survey for the Port. This survey differed from the previous two as it was targeted to a much wider range of the Port's stakeholders, rather than immediate local communities. It included business owners, suppliers, customers and shipping agents, among others (a full list can be found in the methodology). 254 people completed this survey.

The aim of this survey was 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. As a Trust Port, the port regularly seeks the views and concerns of its stakeholders through its Advisory Board, its Annual Consultative 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.

2. Methodology

PCF were asked by the Port to promote, analyse and report on this 2016 survey. This year, the Port wrote the survey questions and provided a list of defined stakeholder categories. In addition to this online survey, the Port separately identified groups of key stakeholders who they spoke to directly to gather feedback. PCF were asked to use their contacts and networks to identify a list of individuals to contact within each category. Together these categories were:

- Cadw
- Customers
- Department for Transport
- Dyfed Powys Police
- Fishing industry
- Haven Waterway Enterprise Zone Board
- Leisure users of the Waterway (including mooring holders)
- Local associations, voluntary and community groups
- Local MP's and AM's
- Local businesses (Milford Haven, Pembroke and Pembroke Dock)
- Marine Management Organisation
- Maritime and Coastguard Agency
- Mid and West Wales Fire and Rescue Service
- Milford Harbour Users Association
- Milford Haven Town Council
- National Trust
- Natural Resources Wales
- Network Rail
- Neyland Town Council
- Other professional users of the Waterway
- Pembroke Town Council
- Pembroke Dock Town Council
- Pembrokeshire Coastal National Park Authority
- Pembrokeshire County Council
- Pembrokeshire Tourism
- Port Suppliers
- Pembrokeshire residents
- Schools and Colleges (Milford family of schools, Pembroke and Pembroke Dock)
- Shipping agents
- Swansea Bay City Region Board
- The Crown Estate
- UK Government
- Welsh Government

The survey questions can be seen in Appendix A. The survey was created online using www.surveymonkey.com and individuals identified within the stakeholder categories were contacted via email or phone and asked to complete the survey, in addition to the key stakeholders who met with senior members of Port staff. The link was also posted on PCF's social media (Facebook and Twitter) and shared on the Port', on the PCF website and in the PCF e-newsletter. A press release was also sent around to local media contacts and the survey was published in the Milford Mercury and the Tenby Observer. £100 worth of vouchers to be spent at a Milford Marina based retailer, restaurant or café were offered as an incentive. The survey was open between 28th June and 1st August 2016 and during this time it was completed by 254 people.

The survey results were then analysed and for the purposes of this report have been broken down into the following sections:

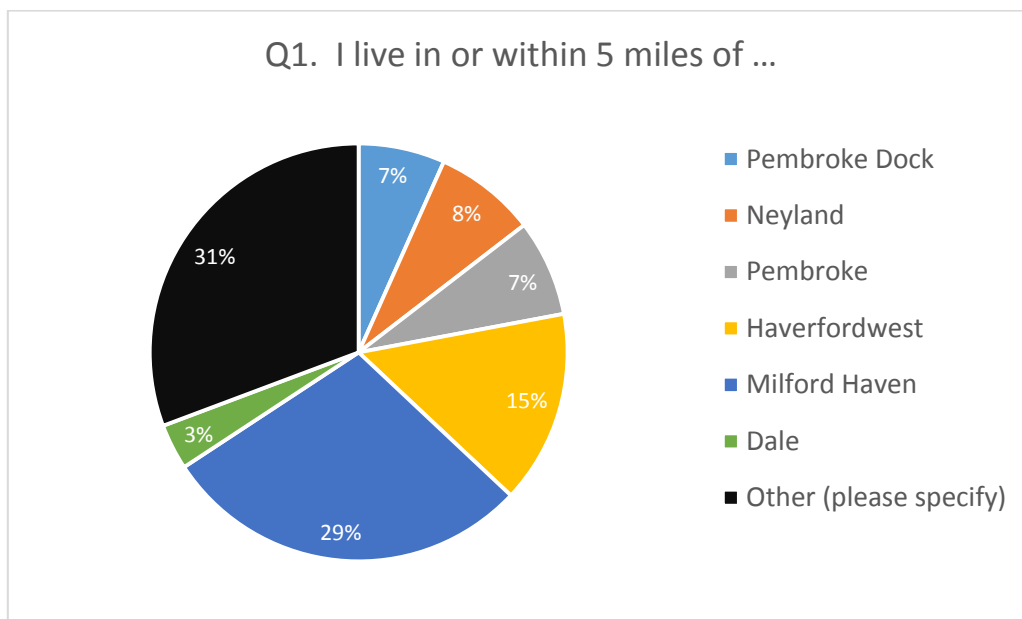
- Respondent Background
- The Work of the Port
- The Port and the Community
- The Port's Priorities and Performance
- Performance Measurement
- Communication

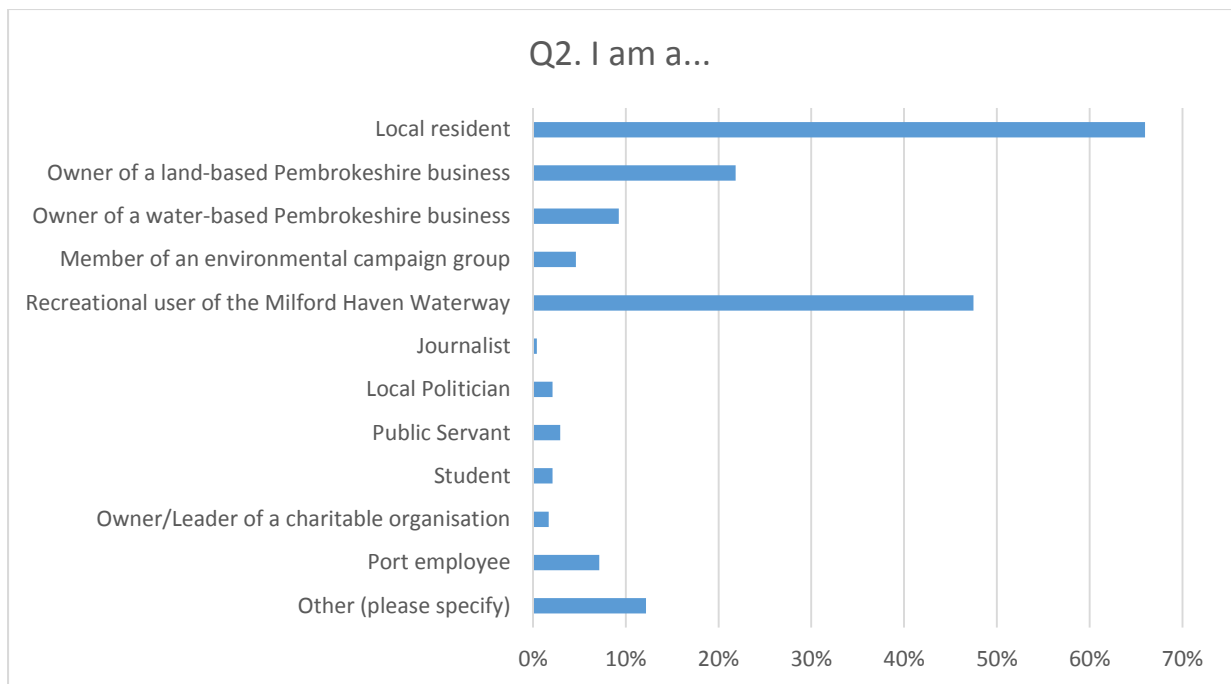
3. Survey Results

This section will outline the results of the survey giving more in-depth analysis on key areas. All charts and graphs represent 2016 data.

3.1 Respondent background

The first two questions were designed to establish each respondent’s relationship to the Port. The first established in which region of Pembrokeshire the respondent lived. Of the 31% (78 people) who answered “Other” 30% (23 people) indicated that they lived elsewhere in Pembrokeshire or Carmarthenshire, whereas 70% (55 people) gave answers from all over England and Wales - several were from Swansea and Cardiff but others were as far reaching as Bristol, Somerset and Poole.

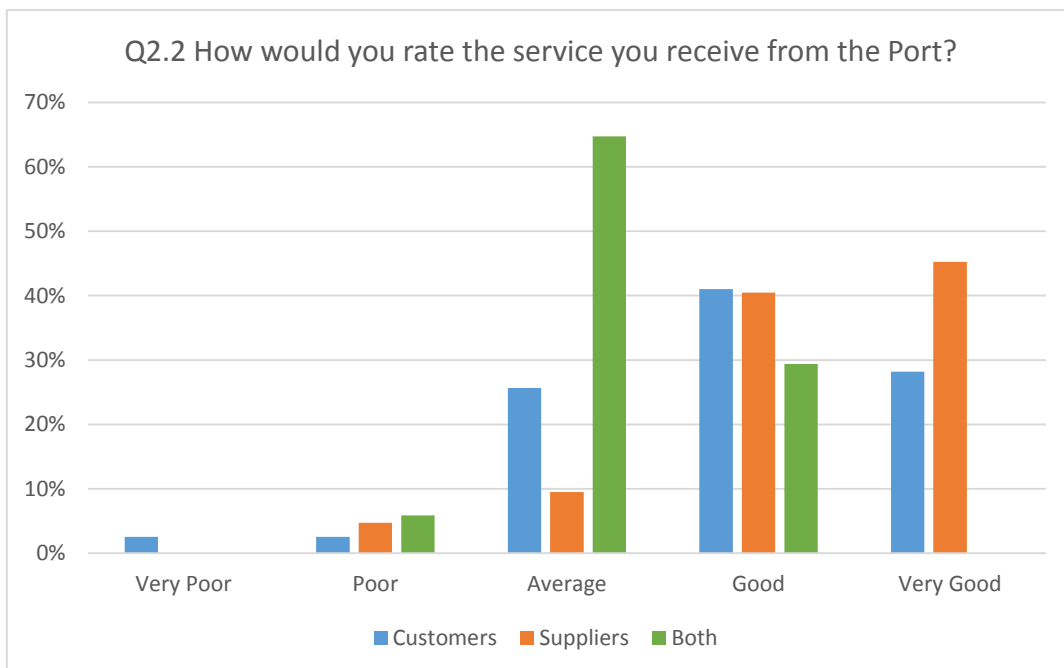
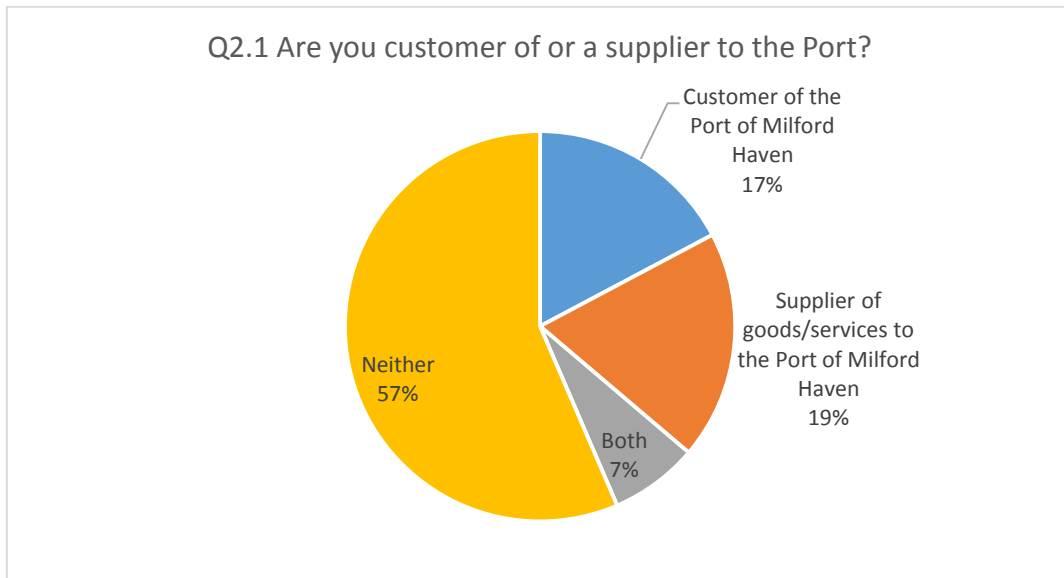




Question 2 gave participants the option to 'tick all that apply'. 66% said they were a local resident, which approximately correlates with the 69% from Question 1 who lived with 5 miles of the identified towns. 48% respondents considered themselves recreational users of the Haven Waterway and 22% were owners of land-based Pembrokeshire businesses. Of those who chose 'Other', a variety of answers were submitted, including:

- *Angler*
- *Chartered Engineer*
- *Committee member of West Wales Maritime Heritage Society*
- *Consultant*
- *Contractor*
- *Governing body of sailing*
- *Holiday home owner*
- *Law Firm*
- *Local Community Councillor*
- *Mooring holder at Dale*
- *Nearby Marina Operator*
- *Owner of business in Carmarthenshire*
- *Professor in water and environmental management*
- *Secretary of a fisherman's association*
- *Supplier*

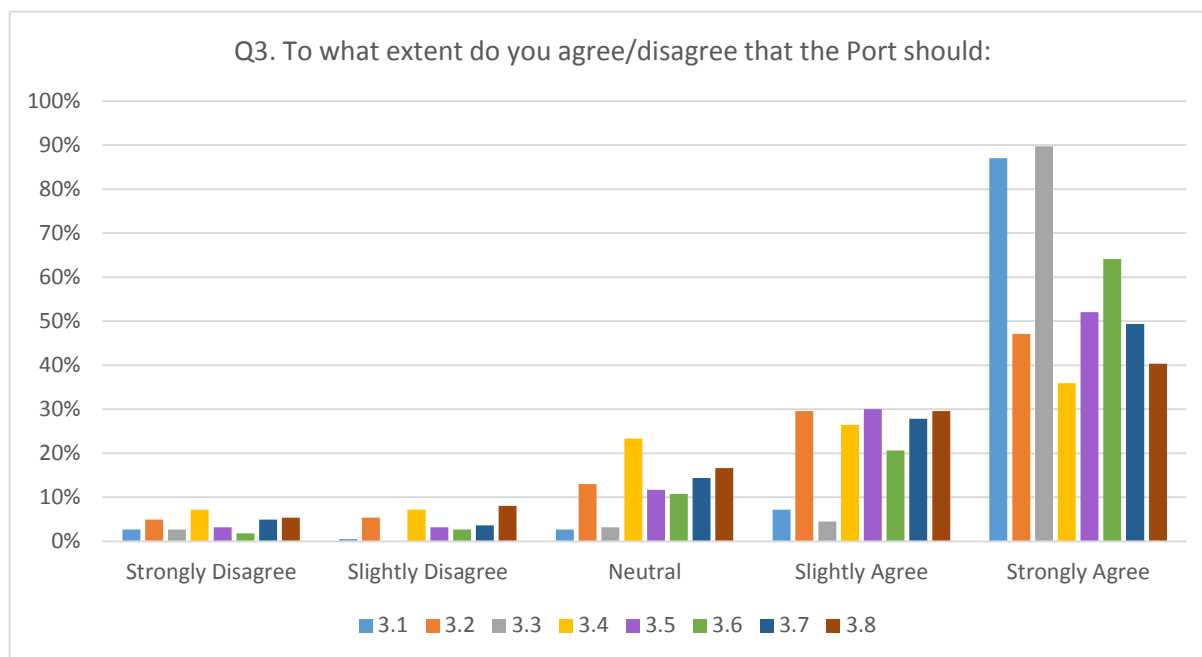
Respondents were next asked whether they were a customer of or a supplier to the Port, of which 43% (101 people) were either or both. Question 2.2 was only available to these 101 people and they were asked to rate the service they received from the Port.



The graph above shows that the service rating differed between the three categories with suppliers seemingly more happy overall than customers - 86% of suppliers ranked the service as either 'Good' or 'Very Good' compared to 69% of customers. The majority (65%) of those that identified themselves as both a customer and a supplier ranked the Port's service as 'Average'.

3.2 The Work of the Port

The next set of questions established what activities the respondents thought the Port should be involved with and it demonstrated how they viewed the role of the Port. Question 3 gave the respondents a series of activities and asked whether they agreed or disagreed that the Port should be doing them. The results are illustrated below.



3.1 Ensure the safe movement of vessels on the Milford Haven Waterway

3.2 Manage recreation on the Milford Haven Waterway

3.3 Prevent pollution

3.4 Invest in the development of land-based tourism in Pembrokeshire

3.5 Invest in the development of sea-based tourism in Pembrokeshire

3.6 Attract new trade and investment to Pembrokeshire

3.7 Invest in the development of the commercial fishing industry around Pembrokeshire

3.8 Invest in the development of the renewables industry in Pembrokeshire

The graph clearly shows that ensuring the safe movement of vessels on the Waterway and preventing pollution received by far the greatest response with 94% of people agreeing (either strongly or slightly) that the Port should undertake these activities. More than 80% of people also agreed (either strongly or slightly) that the Port should work to attract new trade and investment to Pembrokeshire and invest in sea-based tourism. The least favoured activities were investing in land-based tourism and in the renewables industry in Pembrokeshire.

There are some differences to observe when looking at the results of three key stakeholder groups - recreational users of the Waterway, land based business owners and water based business owners,. These differences are most noticeable in questions 3.2 (Manage recreation on the Milford Haven

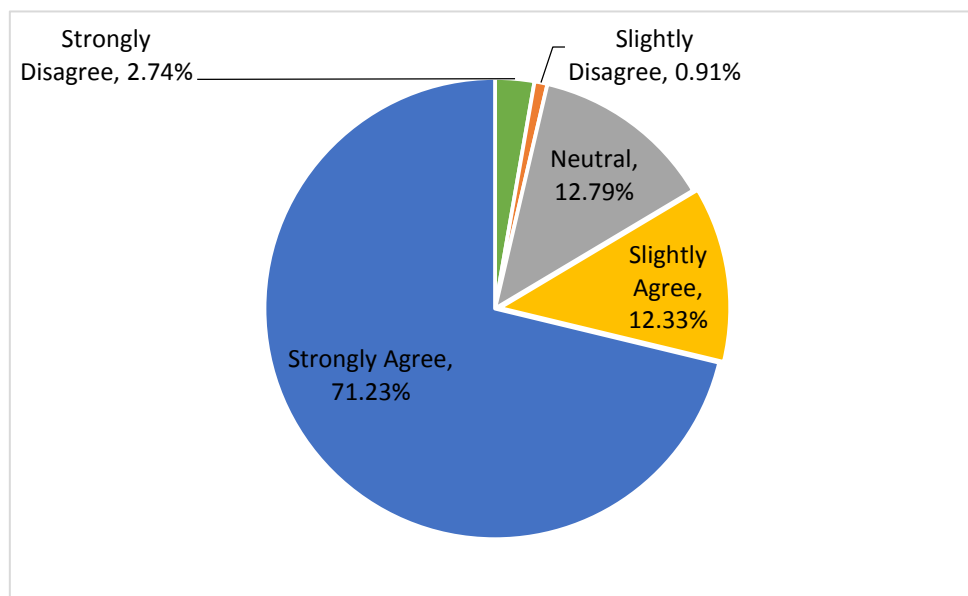
Waterway), 3.4 (Invest in the development of land-based tourism in Pembrokeshire) and 3.5 (Invest in the development of sea-based tourism in Pembrokeshire).

84% of water-based businesses agree (either slightly or strongly) that the Port should manage recreation on the Milford Haven Waterway, compared to 68% of recreational users and 69% of land-based businesses.

73% of land-based businesses agreed (either slightly or strongly) that the Port should invest in the development of land-based tourism in Pembrokeshire, whereas only 48% of recreation users and 47% of water-based businesses agreed with this. 13% of recreation users strongly disagreed with the Port doing this (whereas 0 water-based businesses strongly disagreed). Land-based businesses were overall the most favourable of the Port investing in tourism (both on land and at sea).

3.3 The Port and the Community

Respondents were given information on the Port's Trust Port status, a description of what this meant and examples of how the Port supports business and local community organisations. They were then asked whether the Port should continue to support the community in this way and 89% agreed (either slightly or strongly). 7% of respondents had a neutral view whereas 3.5% (8 people) disagreed, either slightly or strongly with this. These 8 people were then split by the next question of whether the Port should continue as a Trust Port, 4 of them agreeing and 4 of them disagreeing. Overall 84% of respondents felt that the Port should continue as a Trust Port. 75% of respondents were aware of at least one community project which has been supported by the Port.



In question 6 respondents were asked for suggestions of other activities that the Port should get involved with which would make a positive contribution to the Pembrokeshire economy. This question garnered a range of different answers, below are some of the key responses categorised and paraphrased, the full list can be found in Appendix B.

BUSINESS

- Pro-actively support existing businesses within Pembrokeshire
- Invest in developments on the Waterway to attract businesses
- Prioritise local suppliers/services
- More imaginative use of retail space at Milford Marina with increased emphasis on local produce
- Support existing water based activity providers with grants and marketing
- Support small businesses associated with the sea e.g. Boat builders, rope makers
- Use its property portfolio to provide some sort of start-up business office space / tech hub

COMMUNITY

- Donations to local food banks
- Keep prices down in marina for locals
- More of a presence within the locality and advertise the support already provided to local groups and charities
- Take the lead in developing partnership with community and voluntary groups to deliver events, heritage, art and cultural activities in and around the haven
- Work closely with disability organisations

DEVELOPMENT

- Actively support redevelopment along the haven, for example the Blackbridge site
- Kick starting the master plan for Milford Marina
- Revitalised long-term plan for leisure use of whole waterway -- and its economic potential including improved infrastructure e.g. more pontoons
- Support marina developments across Pembrokeshire
- Provide year round water ranger for benefit of all water users annually

EDUCATION

- Provide marine training courses to any tourism related business that meet your safety criteria
- Outreach work in schools regarding your activities
- Promotion of sailing/boating/watersports for younger people
- Support local schools

ENERGY/ENVIRONMENT

- Beach cleans within the Port's boundaries (Dale, West Angle)
- Conserve its wildlife and unique biodiversity
- LNG bunkering
- Provide infrastructure to encourage the growing of mussels and other crustaceans
- Support marine conservation projects
- Support local and renewable energy projects

EVENTS

- Sea based festivals, to promote local fishing, interest in local produce and sea based learning for young children
- Music festivals or nautical based open air plays at the marina
- Hosting a regular market to increase footfall in Milford. Weekend stalls or activities
- Regattas, boat shows, more public pontoons, more support for RYA boating engagement programmes
- Organise an annual event to compete with Cork week

INFRASTRUCTURE

- Open public toilets around the Milford Marina walkway
- Ferry service to the south county from Milford Haven as an alternative to the bridge and driving around when closed
- Repair/renovation of Hakin coastal path
- Put up a welsh Croeso sign at the Milford Marina entrance
- Illuminate the brand new signs that guide vehicles into the marina at Milford Haven, at night time they are almost invisible
- Provide infra-structure for cruise liners

HERITAGE

- Replica Viking long ship for trips and team building. A construction project, visitor attraction based on history and maritime
- Maintain our built and maritime heritage by protecting historic buildings and facilities in the dockyards and waterway as well as the community that rely on those facilities

RECREATION

- Actively encourage social recreational use of yachts/small boats in the upper reaches of the Haven
- Encourage and support recreational engagement for local community
- Give increased encouragement to visiting of traditional sailing and powered traditional ships
- Day boat hire. Run by the Port and with proper instructions given to the customer, this could make the waterway more accessible to everyone, and also return a profit to the Port
- Improving access for recreational users
- Limiting the problem of overfishing
- Develop wreck diving industry on periphery of dale roads by making artificial reefs - could become a mecca for divers thereby helping the local economy
- The ongoing development and marketing of water based leisure activities

As demonstrated by the tables above, the suggestions provided by the respondents are varied and cross cutting through a range of sectors. The most frequently occurring ideas were to do with education - getting children involved with sailing and other watersports was suggested by a number of people, they are also keen to see the Port becoming more involved with Pembrokeshire's schools. There were a lot of suggestions for events to be held in and around the Haven Waterway, as a way of encouraging people to go to Milford Haven and the surrounding area and celebrating Pembrokeshire.

3.4 The Port's Priorities and Performance

Question 7 asked the respondents to place 10 activities undertaken by the Port in order of priority, according to their views. To analyse the data, points were awarded for each activity - when an activity was ranked 1st it was given 10 points, 9 points for 2nd, 8 points for 3rd etc. When an average was taken of this, a list could be produced of the typical order of priorities. This is shown below with the average score shown in brackets.

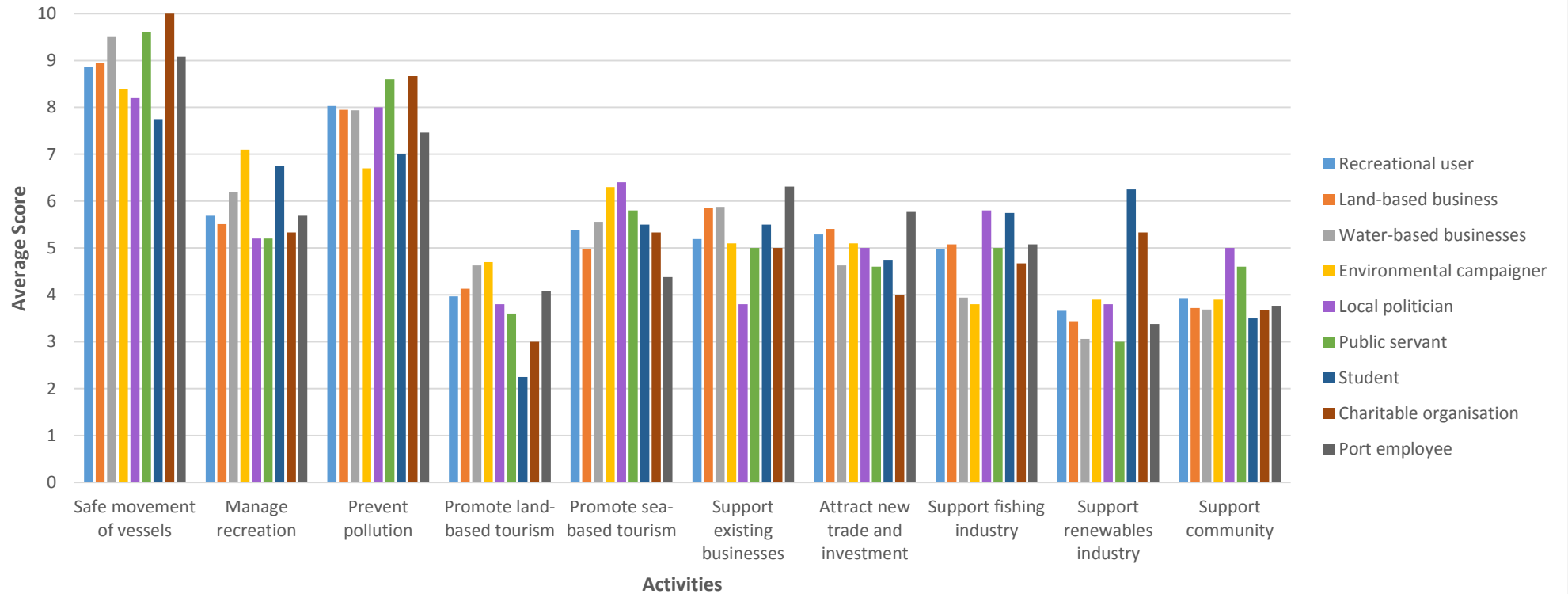
1. Ensure the safe movement of vessels on the Milford Haven Waterway (9.01)
2. Prevent pollution (7.92)
3. Manage recreation on the Milford Haven Waterway (5.72)
4. Attract new trade and investment to Pembrokeshire (5.31)
5. Support existing Pembrokeshire-based businesses (5.29)
6. Promote sea-based tourism in Pembrokeshire (5.21)
7. Support the commercial fishing industry around Pembrokeshire (5.18)
8. Support the Pembrokeshire community and community-based organisations (3.96)
9. Promote land-based tourism in Pembrokeshire (3.82)
10. Support the renewables industry in Pembrokeshire (3.58)

As the scores show, the priorities can be put into 3 distinct groups. To ensure the safe movement of vessels was clearly ranked as the highest priority with 75% of respondents placing it as number 1 in the list. To prevent pollution and to manage recreation were also distinctly placed in 2nd and 3rd. Very little separates ranks 4, 5, 6 and 7 with attracting new trade and investment, supporting existing businesses, promote sea-based tourism and supporting the commercial fishing industry making up this middle section - they were all rarely placed first but also rarely placed last. There is a distinct gap between these 4 middle priorities and the bottom 3 which were frequently placed last in order of priority. Supporting Pembrokeshire communities and community-based organisations, promoting land-based tourism and supporting the renewables industry were recommended by the respondents to be low on the Port's priorities.

It is important to point out that although an activity may be identified as low ranking on the list of priorities, that doesn't necessarily mean that the respondents didn't think that the Port should be undertaking these. For example in Question 3, 62% agreed (either strongly or slightly) that the Port should invest in the development of land-based tourism in Pembrokeshire and 70% of respondents agreed that the Port should invest in the development of the renewables industry in Pembrokeshire despite these being ranked 9th and 10th overall respectively in terms of priorities.

The graph on the next page shows these figures broken down into the stakeholder groups identified in Question 2. Local residents have not been included in this graph as the majority of those who identified themselves as local residents were also members of other stakeholder categories. There are a number of key areas to point out. For example managing recreation was ranked highest by environmental campaigners and students than any other group, and similarly supporting the renewables industry was deemed significantly more important by students and owners/leaders of charitable organisations. Supporting the fishing industry and supporting the community were ranked highest by local politicians whereas supporting existing businesses and attracting new trade and investment were ranked highest by port employees.

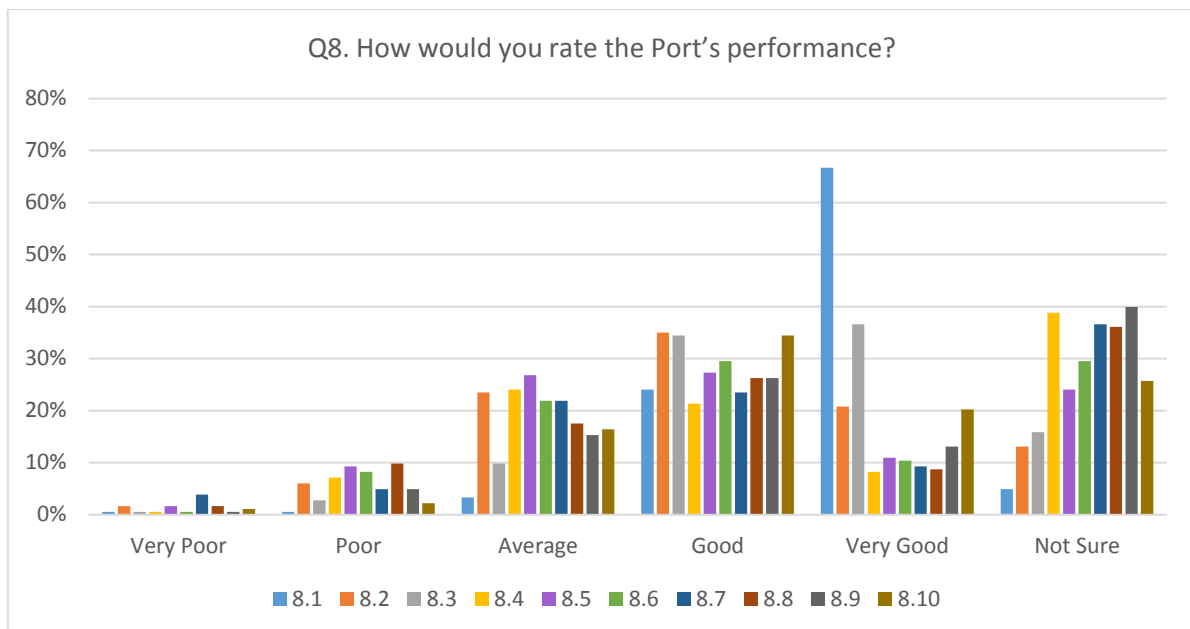
Q7. According to your views, please place the following activities in order of priority



**the higher the average score, the more often the activity was ranked as high priority*

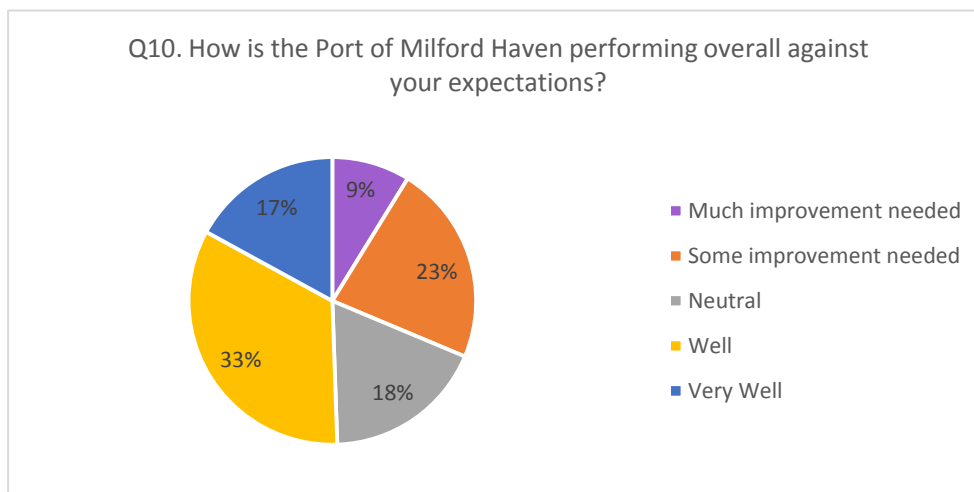
Those activities that were ranked the lowest in terms of Port priorities were promoting land-based tourism and supporting the renewables industry. When then asked to rate the Port’s performance, these two activities received the highest number of people who ticked ‘Not Sure’. Out of the 10 activities that the respondents were asked to rate the Port’s performance in, 5 of them had more people ticking the ‘Not Sure’ box than any of the other rating options (8.4 Promoting land-based tourism, 8.6 Supporting existing Pembrokeshire-based businesses, 8.7 Attracting new trade and investment, 8.8 Supporting the commercial fishing industry and 8.9 Supporting the renewables industry).

There is a clear correlation between Q3, Q7 and Q8 as ensuring the safe movement of vessels and preventing pollution were among the answers with the least amount of people answering ‘Not sure’ to Q8, they were ranked the top 2 Port priorities in Q7 and they also received the highest amount of people agreeing that the Port should be undertaking them. However when looking at attracting new trade and investment to Pembrokeshire, 85% of respondents agreed (either slightly or strongly) that the Port should be doing this, and it was ranked 4th highest priority for the Port, but 37% of respondent weren’t sure of the Port’s performance in this area.



- 8.1 Ensuring the safe movement of vessels on the Milford Haven Waterway
- 8.2 Managing recreation on the Milford Haven Waterway
- 8.3 Preventing pollution
- 8.4 Promoting land-based tourism in Pembrokeshire
- 8.5 Promoting sea-based tourism in Pembrokeshire
- 8.6 Supporting existing Pembrokeshire-based businesses
- 8.7 Attracting new trade and investment to Pembrokeshire
- 8.8 Supporting the commercial fishing industry around Pembrokeshire
- 8.9 Supporting the renewables industry in Pembrokeshire
- 8.10 Supporting the community and community based organisations

3.5 Performance Measurement

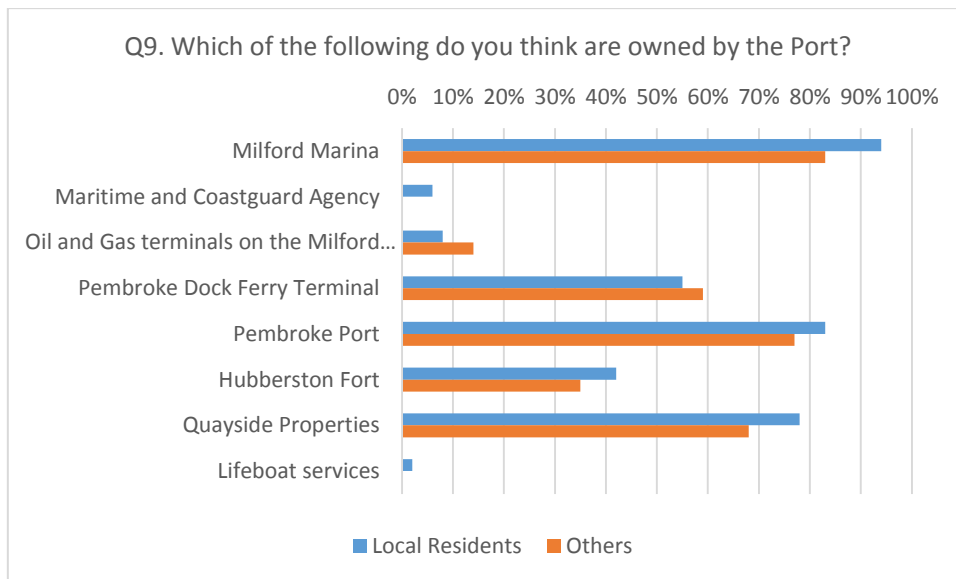


Overall 50% of people taking the survey thought that the Port is performing either well or very well against their expectations, with 31% thinking that some or much improvement is needed. When splitting this by the individual stakeholder groups, water-based business owners were the least satisfied with the Port’s performance - with 63% believing that some or much improvement is needed compared to just 36% of land-based businesses and also 36% of recreational users of the Waterway. It could be argued that this question might have been worded differently as most businesses can improve in some way and therefore most respondents would be inclined to select ‘some improvement needed’ without necessarily being disappointed with the Port’s performance. For example if the question had been to rate the Port’s performance on a scale of 1-5 with 1 being ‘much improvement needed’ and 5 being ‘very well’ this may have resulted in those who said ‘some improvement needed’ giving a score of ‘4’ out of ‘5’ which would correlate to ‘well’.

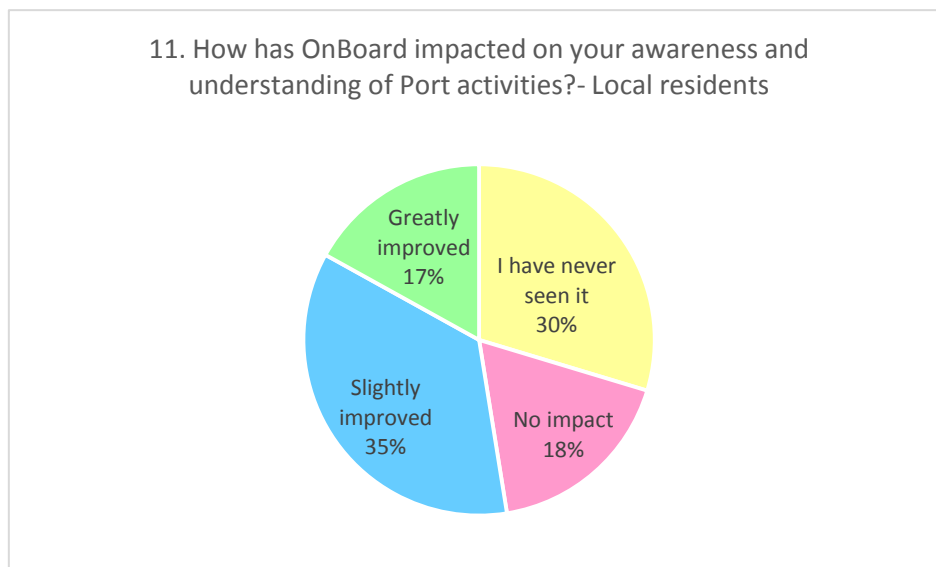
3.6 Communication

Survey respondents were next given a series of locations and services in and around the Haven Waterway and were asked whether they thought these were owned by the Port or not. The graph below shows these results split by those respondents that identified themselves as local residents and these that did not.

It might be expected that local residents should have a better understanding of the Port’s properties and this is true in the case of Milford Marina, Pembroke Port and Quayside properties, but a higher percentage of non-local people were aware that the Ferry Terminal is owned by the Port. Significantly less people overall were aware that Hubberston Fort is owned by the Port. The number of non-locals who thought that the oil and gas terminals on the Waterway were Port owned (14%) nearly doubled the amount of locals (8%). None of the non-local people completing the survey thought the Port owned the MCA or lifeboat services, but a small number of local residents did - 6% and 2% respectively.

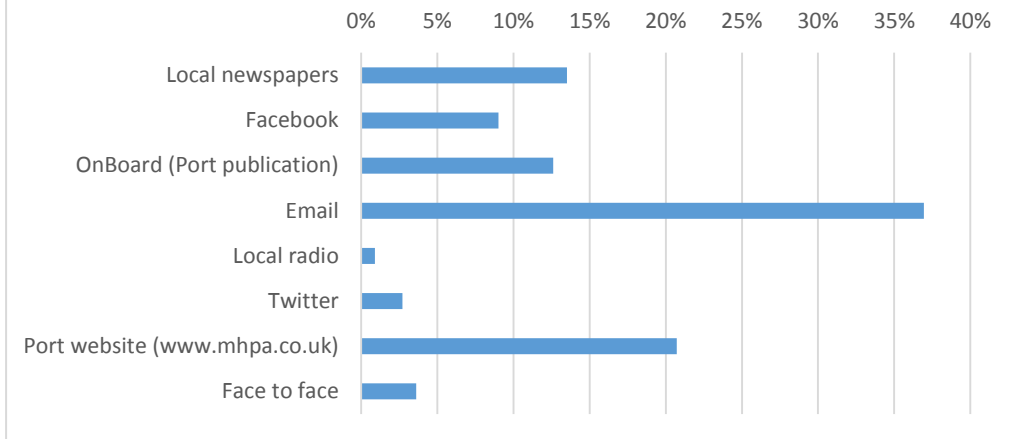


The final two questions of the survey established which communication methods respondents find most effective. Twice a year 30,000 homes and businesses surrounding the Haven Waterway receive a copy of the OnBoard publication which aims to inform stakeholders of activities and developments taking place, or planned to take place, on the Haven. When looking at the opinions of those identified as local residents (67% of non-local people had never seen it) 53% said that their awareness and understanding of Port activities had improved (either slightly or greatly) through reading OnBoard.



When these local residents were asked their preferred form of communication 13% chose the OnBoard publication. Email was by far the most popular option (37%), followed by the Port’s website (21%).

12. Which form of communication to you find most useful for keeping up to date with Port news? - Local residents



4. Conclusion

- 4.1 It is difficult to compare the results of this survey to those from 2014 and 2009 as the approach for this survey has been very different. Results from the two previous reports can be seen in Appendix C. The questions themselves were rewritten by the Port this year and have shifted their focus, with 8-10 key Port activities specifically chosen and investigated throughout the course of the survey. Far more open-ended questions were asked in previous years giving respondents the opportunity to give longer, more detailed answers. The respondents surveyed in 2016 were much broader and included many of the Port's key stakeholder groups, all identified and specifically targeted as outlined in the methodology. Previous surveys have only focused on community members and had been completed during public events across the Haven Waterway. In comparison the 2016 survey was online only and was distributed using the Port's and PCF's extensive contact networks and social media. This allowed a much wider selection of people to be surveyed, and geographical location did not prevent people taking part. This reflects the Port's far-reaching stakeholder accountability.
- 4.2 This has been demonstrated in this survey through the background of the respondents, with people taking part from all over Pembrokeshire, with many living in other parts of the UK. People also responded from a broad range of sectors, however as question 2 allowed respondents to 'tick all that apply' it was challenging to distinguish which category the respondents primarily viewed themselves as. 43% of those taking the survey were either customers or suppliers for the Port (or both) and generally rated the Port's service favourably (although there was a distinctly lower rating from those that were both customers and suppliers and the Port should investigate this).
- 4.3 The work of the Port was clearly defined by respondents with a vast majority strongly agreeing that the Port should be involved with the safe navigation of shipping and pollution prevention. In 2009 74% agreed that the Port should have a role in environmental control and monitoring of the Waterway and in 2014 this dropped slightly to 72%. However in 2016 94% of respondents thought that Port should be actively working to prevent pollution. This also reflected what respondents thought the Port's priorities should be - again safe navigation of shipping and pollution prevention were top of the list.
- 4.4 The Port has consistently supported the community through its community fund and through other direct initiatives such as organising and running the Milford Fish Festival and by contributing significant funding for the next ten years to ensure that pontoons used for recreation on the Milford Haven Waterway remain available for everyone to enjoy. This support, and the promotion of it in relation to the Port's Trust Port status, is reflected in the 2016 survey results. In both 2009 and 2014 only 25% respondents were aware of a community project supported by the Port, whereas in 2016 this figure rose significantly to 75%. Previous surveys have also shown confusion and lack of awareness surrounding the Port's Trust Port status; however in 2016 84% agreed that the Port should continue as a Trust Port.

- 4.5 Many suggestions were provided regarding other activities the Port should get involved in, the most frequent included getting young people involved in water sports activities, and hosting more events to draw more people to Milford Haven. It is recommended that the Port consider some of the suggestions which have been made.
- 4.6 The Port's performance was generally seen favourably; with the same 2 activities which were thought to be the main priorities also being seen as the ones which the Port was performing well in (safe navigation of shipping and pollution prevention). 50% of respondents thought the Port was performing well overall against their expectations which shows no change from 2014.
- 4.7 There were however large percentages of respondents who were unsure of the Port's performance in areas outside of the Port's traditional marine roles. This could potential be improved through increased communication in these areas, although this might simply relect that the stakeholders who were unaware were not interested in that aspect of the Port's role and therefore information about those activities would not be on their radar. A number of people remain unaware of the Port's property as well as its ownership of Pembroke Port and Pembroke Dock Ferry Terminal. This was also evident in both the 2014 and 2009 surveys. The 2014 report concluded, *"Respondents clearly identify an awareness of the main roles of the Port with many positive views on how it carries out its main navigation and safety functions on the Waterway. However it also highlights the misconceptions about other areas of work that the Trust Port is involved in."*
- 4.8 Email and website were clearly identified as the preferred communication methods.
- 4.9 In 2016 the majority of respondents agreed that the Port should be taking part in a range of activities, and the order of priority for these varies for different stakeholder groups depending on their own interests.
- 4.10 There has been a huge increase in awareness of community projects supported by the Port.

5. Appendices

Appendix A

Survey Questions for 2016 survey

Appendix B

Full set of answers for Question 6 - What other activities do you think the Port of Milford Haven should get involved with which, in your opinion, would make a positive contribution to the Pembrokeshire economy?

Appendix C

Table of Results from surveys conducted in 2014 and 2009