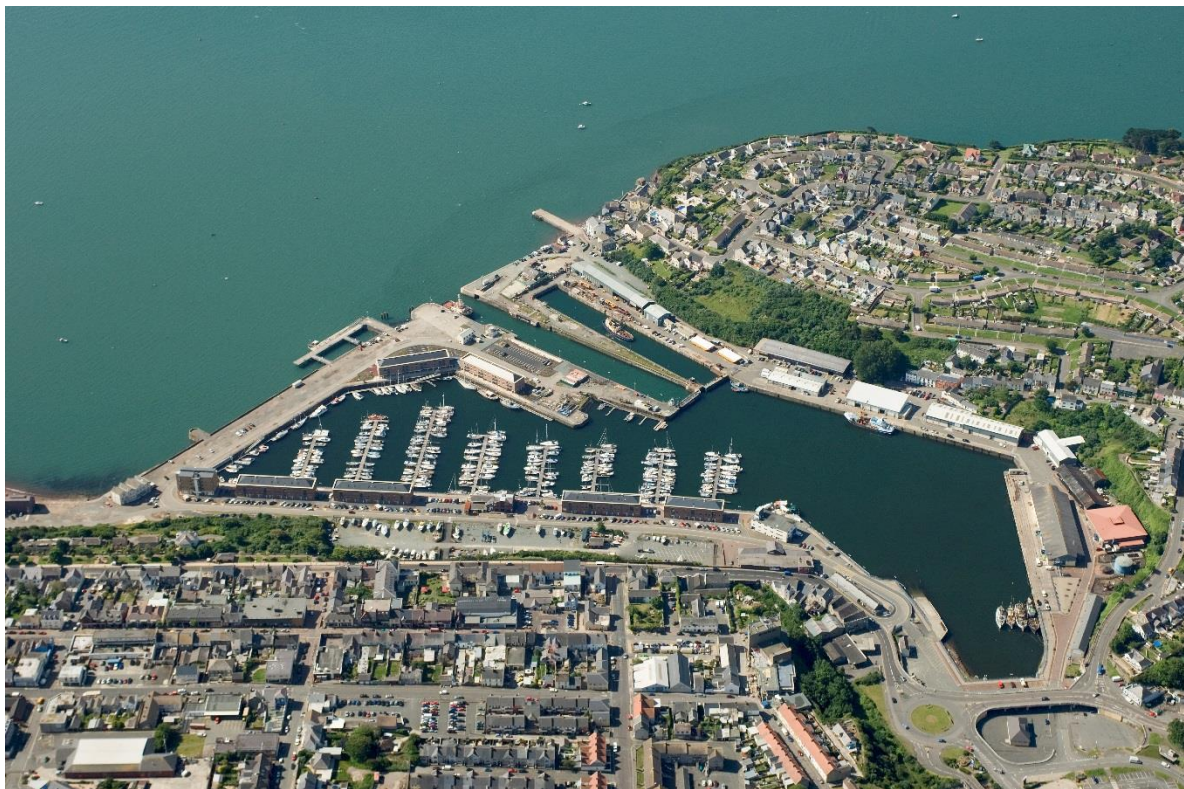

PORT OF MILFORD HAVEN STAKEHOLDER PERCEPTION SURVEY 2017



Report by:

Pembrokeshire Coastal Forum,
2nd Floor, Pier House, Pembroke Dock, Pembrokeshire, SA72 6TR

www.pembrokeshirecoastalforum.org.uk



Port of Milford Haven

delivering port infrastructure and services

Report prepared for:	
Port of Milford Haven	
Manager:	Anna Malloy
Address:	Port of Milford Haven, Gorsewood Drive, Milford Haven, Pembrokeshire, SA73 3ER
Telephone:	01646 696156
Contract reference	POMH/08/17

Report prepared by:	
Pembrokeshire Coastal Forum CIC	
Project Manager:	Holly Pretious
Address:	Pembrokeshire Coastal Forum CiC, 2 nd Floor, Pier House, Pier Road Pembroke Dock Pembrokeshire SA72 6TR
Telephone:	01646 405690

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Executive Summary

This stakeholder perception survey is the fourth 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, 2014 and 2016. This survey was a replica of the one used in 2016 with a few minor edits. The survey was marketed to a broad range of stakeholders from local community members, business owners, Port customers, suppliers and statutory bodies. In total, 372 people took part.

Overall the results of this survey give a positive view of the Port, a large majority of respondents agree with all of the activities being undertaken and most rate the Port's performance in these areas favourably. Investing in a way that creates opportunities for local businesses to emerge and to grow is seen as a vital aspect of the Port's work. Different stakeholder groups prioritise these activities differently in accordance with their own interests however overall the Port is meeting or exceeding the expectations of 53% of those taking this survey, which is a 3% increase from 2016.

The role of the Port within the local community continues to be of vital importance with 97% of respondents in agreement that the Port should continue its community work (8% increase from 2016). 90% of people feel it is important that the Port should continue to be a Trust Port (7% increase from 2016).

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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. 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 order to enable a comparison of the results and to see whether any change was visible. This survey received 170 responses and although gave an overall positive view of the Port and the work that it does, it was found that there was still an element of confusion about its roles and activities outside of navigation and shipping safety.

In 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, and 254 people completed this survey. This survey demonstrated a clearer understanding of the Port's work and an appreciation of its work in attracting new trade and investment to Pembrokeshire. There was also a huge increase in awareness of Port-supported community projects compared to 2014.

The aim of this 2017 survey was to measure whether the positivity reflected in 2016 had 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 is of particular importance to the Port in 2017 as it undertakes new and significant projects such as Pembroke Dock Marine and the redevelopment of Milford Waterfront.

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 2017 survey. The Port wrote the survey questions and provided 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 2016. The Port also provided a contact list of individuals to contact. Those targeted included local residents, local business owners, Community Councillors, schools, Government, Port customers and suppliers, among others.

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. A list of stakeholder categories can be found in Appendix B. The link was also posted on PCF's social media (Facebook, Twitter and LinkedIn) and shared by 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 Western Telegraph and the Milford Mercury. £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 11th July and 11th August 2017 and during this time it was completed by 372 people.

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

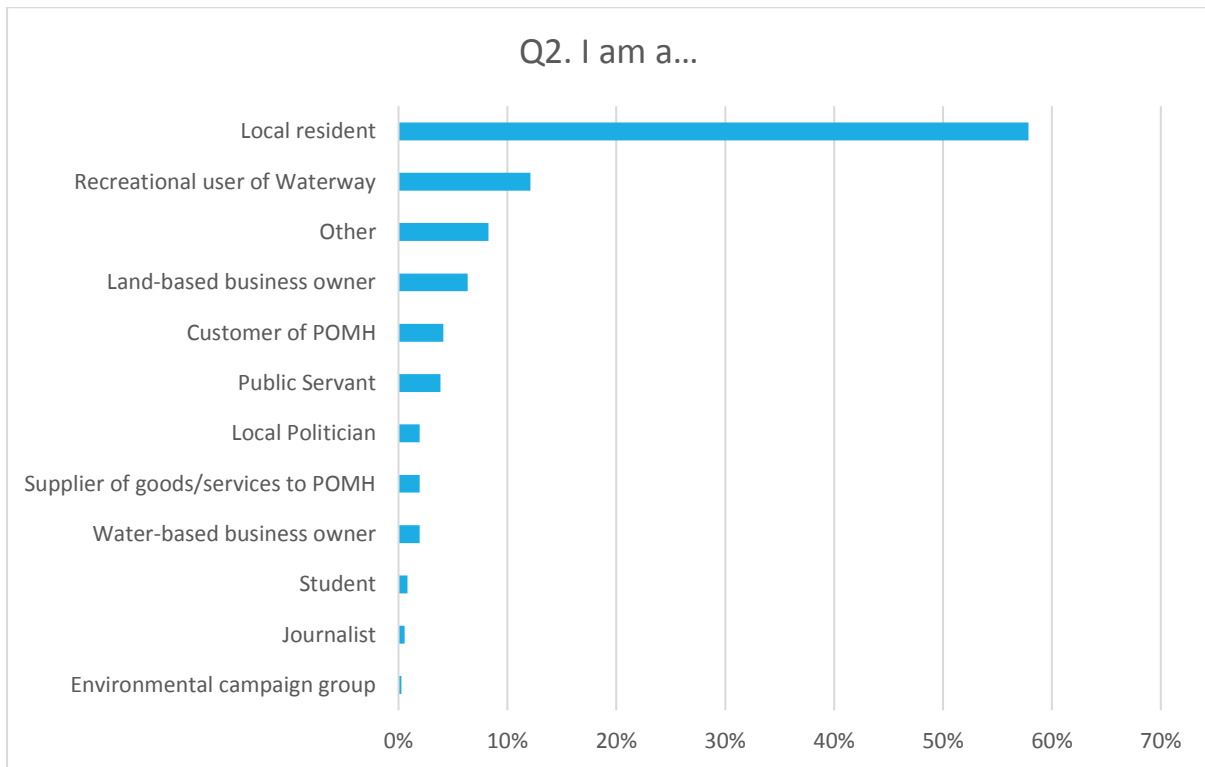
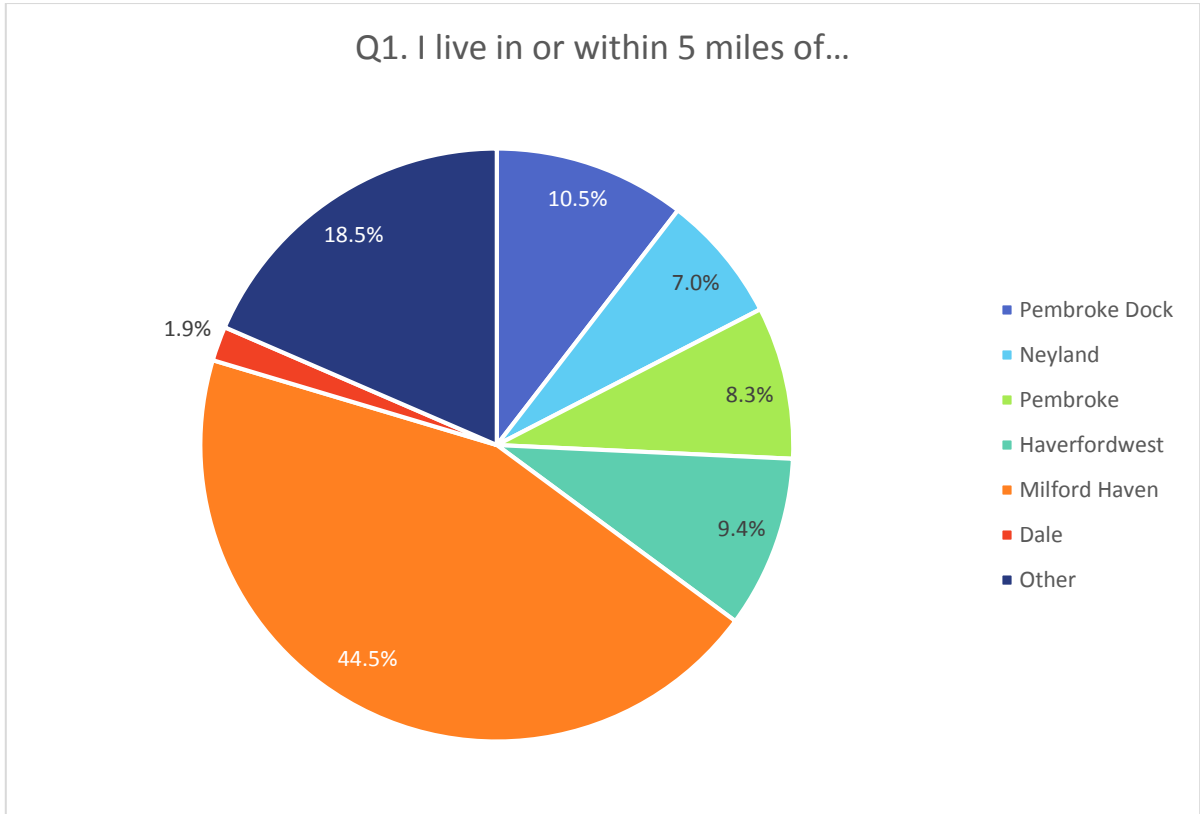
- Respondent Background
- The Work of the Port
- The Port and the Community
- The Port's Priorities and Performance
- Performance Measurement
- Communication

These sections are the same as used in the 2016 report in order to allow a direct comparison.

All figures in this report have been rounded to the nearest whole number. The full datasets can be found in Appendix C.

3. Survey Results

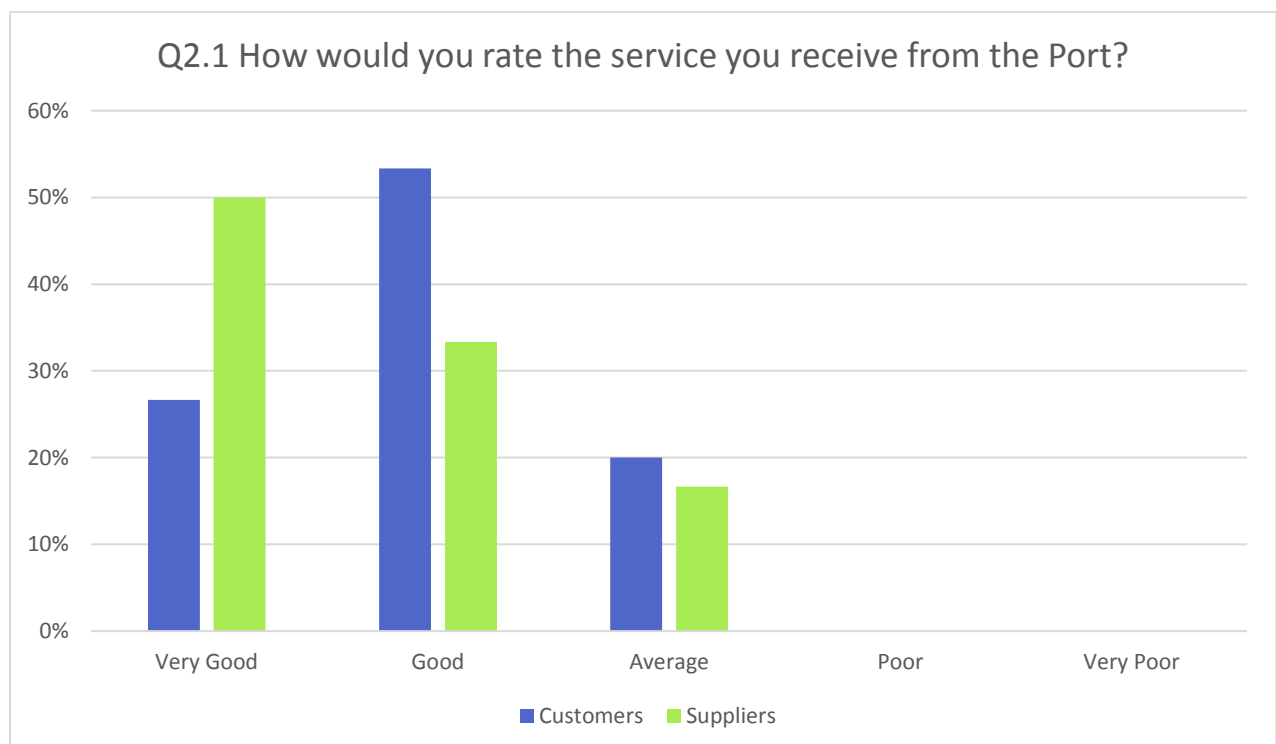
3.1 Respondent Background



Of the 372 people that completed this survey, nearly half lived within 5 miles of Milford Haven and 58% considered themselves as local residents. Of the 18.5% of people that lived in an 'other' location, the majority of these were from other parts of Pembrokeshire e.g. Tenby, Fishguard, Narberth, St. David's with a few from further afield such as Carmarthen, Swansea or Cardiff. 7 people came from outside of Wales.

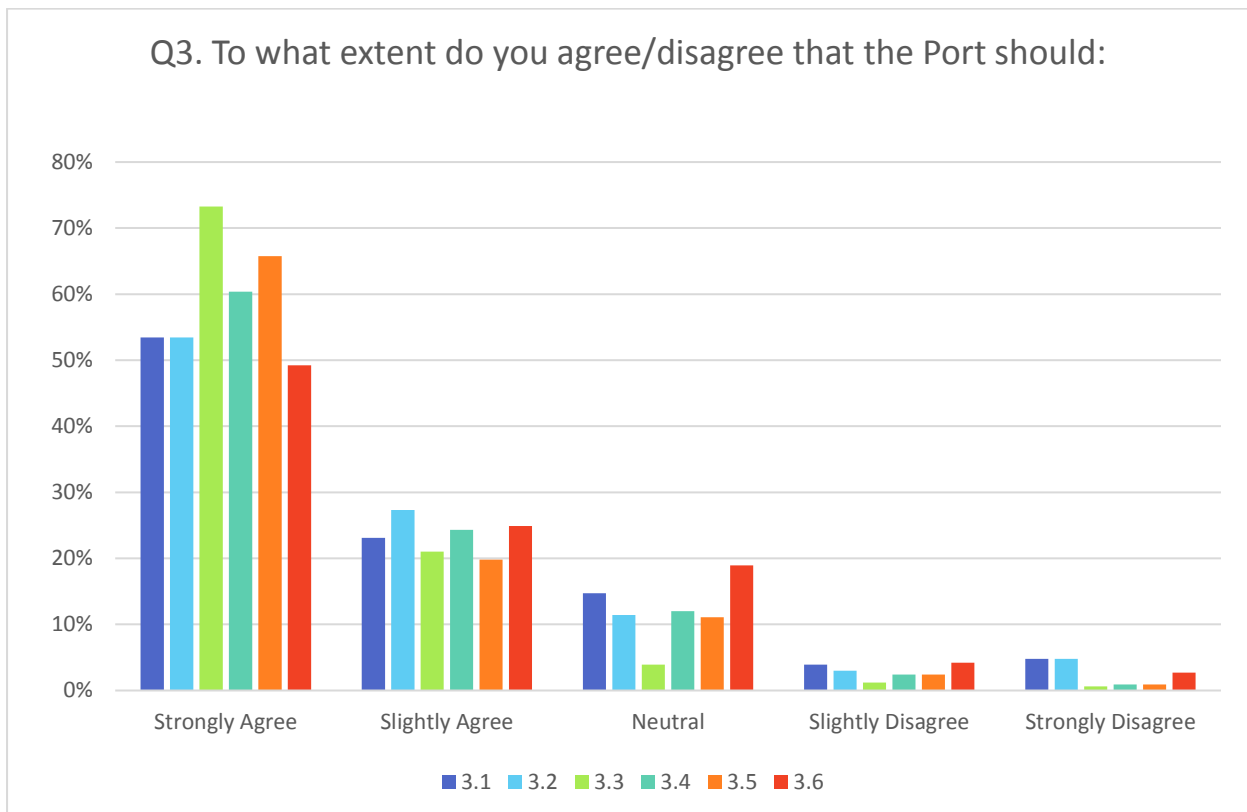
In previous surveys when asked to describe their relationship with the Port people have been able to choose more than one category, however this time this was limited to just one and they were asked to pick the description which most closely described their relationship. As a result the majority of people defined themselves as local residents with 12% being recreational users of the Waterway. Those that defined themselves as 'other' gave a variety of descriptions including:

- Town or Community Councillor
- Tourist
- Senior Manager for a plc with a Business Unit in Pembroke
- Chairman of a rented building owned by the Port
- Manager of a business (registered charity) in Pembroke Dock
- National Trust Manager
- Education
- Port employee
- Fire and Rescue Service Representative
- National Park Authority
- Ex Non-Executive Director and current Chairman of the Pension Scheme Trustees
- Land owner
- National governing body of boating rep
- Local Action Group (Not for profit)



Q2.1 was only available to those who identified themselves as customers or suppliers of the Port and 82% respondents rated the service as 'Very Good' or 'Good', compared to 70% in 2016. 37% of people rated the service as 'Average'.

3.2 The Work of the Port

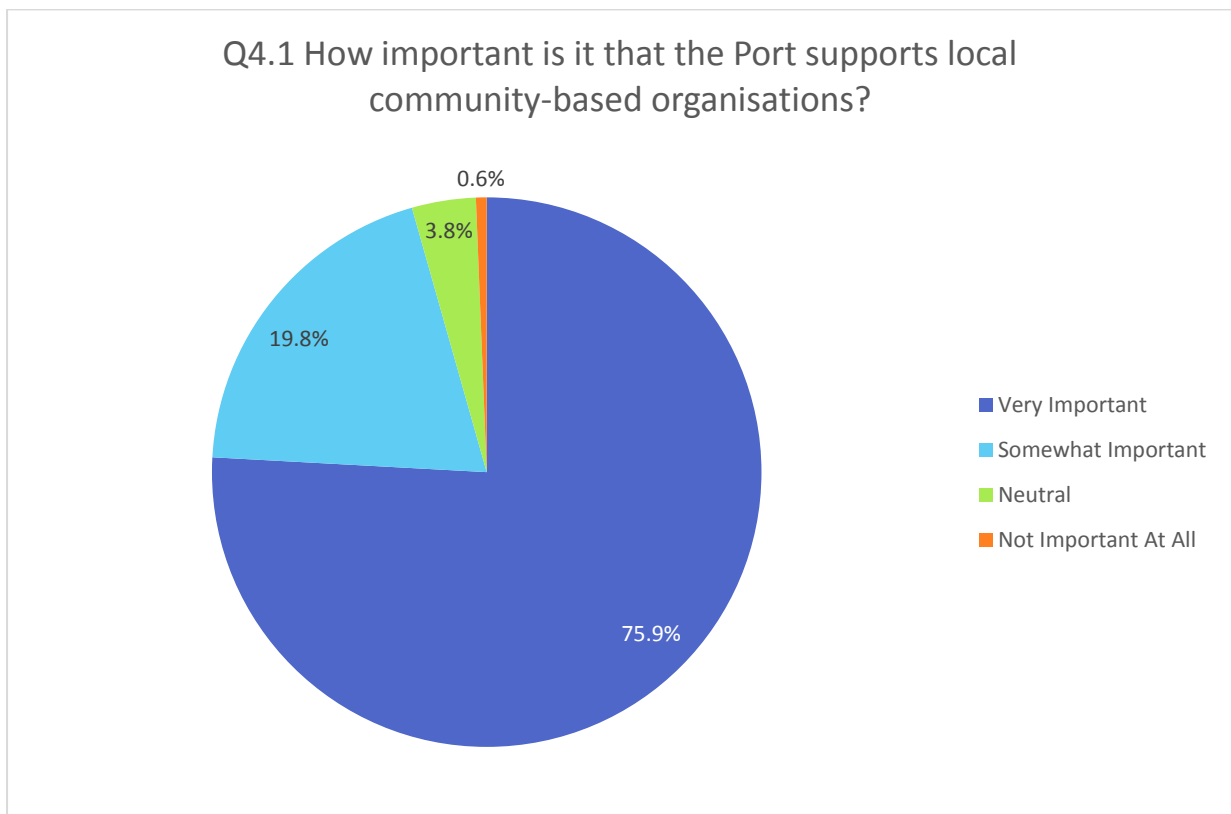


- 3.1 Invest profits to develop Pembroke Port as an internationally recognised centre for the development of marine renewable technology*
- 3.2 Invest profits to develop Milford Waterfront as a retail and leisure destination*
- 3.3 Invest in a way that creates opportunities for local businesses to emerge and to grow*
- 3.4 Invest in the development of tourism in Pembrokeshire*
- 3.5 Act as a regional champion to help attract new trade and investment to Pembrokeshire*
- 3.6 Invest in the development of the commercial fishing industry around Pembrokeshire*

95% of people taking this survey agreed that the Port should invest in a way that creates opportunities for local business to emerge and grow. Investing in the development of the commercial fishing industry around Pembrokeshire received the least amount of 'agrees' (74%) with 19% of people 'neutral'.

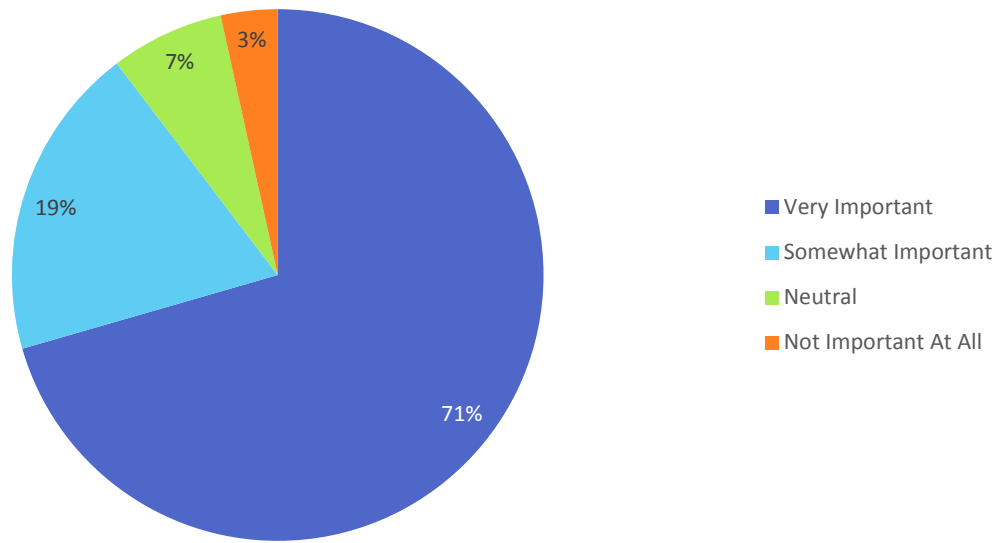
There are large variations in these results when they are broken down into different stakeholder groups, for example when comparing local business owners (land or water) to recreational users of the Waterway. 88% of business owners agree that the Port should be investing in the development of tourism compared to 75% of recreation users, and 75% of business owners believe the Port should be investing in the commercial fishing industry compared to 56% of recreation users.

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.

Q4.2 How important is it that the Port remains a Trust Port?



96% of those taking part in this survey felt that it was important that the Port supports local community based-organisations (8% more than in 2016) and 90% thought that it was important for the Port to remain a Trust Port (7% more than in 2016).

Q5 asked respondents if they were aware of any community projects that have been supported by the Port, to which 72% replied yes. They were then given a list of organisations supported by the Port in 2016.

Q6 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 D.

Businesses

- *Support current and new emerging industries*
- *Supporting local businesses in the area and not just around the marina.*
- *Good rates for companies using the port*
- *Supporting and developing infrastructure for existing business around and on the waterway instead of concentrating on new business which will displace existing businesses*

Community

- *Supporting Pembroke Dock based community groups*
- *Milford Youth Matters*
- *Youth projects especially for disadvantaged young people*
- *Supporting local disability organisations and groups*
- *Pembrokeshire siblings group*
- *Supporting the community, developing opportunities for youth engagement and employment and generally improving Milford Haven*

- *Pembroke Town Regeneration Committee*
- *Reach out to communities in North Pembrokeshire*

Development/Investment

- *Develop waterfront attractions - restaurants/pubs, to maximise the value of waterfront locations*
- *Help develop town centre. Charles Street, Milford Haven*
- *Improve the physical and structural appearance of Milford Town before implementing the marina waterfront pipedreams*
- *Take over the Watergardens on the Rath, and turn it into a splash pool i.e. jumping water fountains*
- *Develop shell fish hatcheries. Lobsters, oysters possibly sea urchin, as they are a delicacy in Japan.*
- *More investment in activities in Milford Haven which create jobs and attract more visitors to the town.*
- *Encourage the regeneration of the land adjacent to Asda Pembroke Dock e.g. cinema, bowling alley, retail outlets, residential units, tidy up area leading to Maritime Museum and other points of interest - will encourage businesses to invest and enhance Pembroke Dock.*
- *Investing money into the local amenities for example the Rath area, Gelliswick bay and not forgetting the Town Centre. The port need to get involved in more of the area, and not just the Waterfront area.*

Education/Employment

- *Sponsoring outdoor water based activities for local children to be more aware of what is on their doorstep*
- *Education projects - particularly STEM projects.*
- *Generating employment and training opportunities for young people linked to port activities*
- *Work more with schools, expand on the sponsorship for students*
- *Young Peoples project and more partnerships with the Youth Services*
- *Enterprise fair for school children as is done in Haverfordwest*
- *Create more employment opportunities with the Port*
- *Diver training: recreational, technical, commercial offshore safety training*
- *Academy for marine and maritime knowledge*
- *Encourage better understanding of the Port's role and provide educational opportunities to youngsters in schools*

Environment

- *Investigation of biodigesters to produce energy from waste (food waste, green matter, fish waste, farm slurry, Turkey carcass waste) huge problem for farmers dealing with slurry and nitrates in the rivers. Proven technology but we have to buy very expensive German digesters. Develop a Welsh digester.*
- *Biodiversity conservation - Provide support for local and regional groups working to protect Pembrokeshire Coast National Park.*
- *Environmental activities contributing to improving natural resource management for the benefit of all*
- *Get involved with more community litter picks on local beaches, liaise with surfers against sewage.*

Events

- *Harbour Festivals*
- *A market on the marina, more kids activities, even if it's craft days or a play area.*
- *More events like powerboat championship*
- *History days. Dress up and storytelling. This would help the museum and remind people why the docks are there.*
- *Entertainment at weekends during the summer e.g. Local bands*
- *A sea shanty festival*
- *Cycling, closed road sportives to promote the area.*

- *Keep doing fish week in Milford Haven, nowhere else as it is so popular in Milford*
- *A music festival.*
- *A festival of water sports.*

Infrastructure

- *Paddling pool on the Rath*
- *Refurb of unused buildings and offer as low price accommodation*
- *Make fresh water available at Hobbs Point floating pontoon*
- *Outdoor sea swimming pool and dive/jump centre*
- *More slipways and landing points on the south of the Haven*
- *Look at establishing more pontoons as at Neyland, Burton and Hazelbeach*
- *With the problems the port had with tomb stoning maybe along with the council come to some agreement on a splash park for the local children to enjoy. The one in Weston super mare is brilliant and suits all ages*
- *Transform Hobbs Point and get it used for fishing and pleasure trips*
- *A deep water cruise ship berth*

Heritage

- *Making more of the heritage of Pembroke Dock, in that they are now custodians of Wales' only Royal Dockyard (see Chatham and Portsmouth for comparators)*
- *Provide more opportunities towards the history of the ports, bring back more things to do with the royal dockyard, more education opportunities about it to help. Bring a famous war ship like HMS Warrior back for a visit*
- *Renovation of the forts along the waterway*
- *Support Milford museum, encourage them to perhaps rework some exhibits*

Leisure

- *Provide the Haven Waterway pontoons free of charge*
- *Water based sports for children*
- *Sea rowing clubs*
- *Providing more public launching points for small boats throughout the waterway*
- *Support the boating community*
- *Encourage leisure industry to make more use of the Cleddau River*
- *Encourage local hobby anglers to the marina and other land it owns*
- *Mental health support with activity based events*

Safety

- *Run courses free of charge i.e. safety at sea, VHF radio, Hazards within the harbour*
- *Promote the RNLI and lifeboat at Angle within the waterway as it is a bit out of the way compared to other stations like Tenby, Newquay etc. and still required as much if not more.*
- *Education about water safety.*
- *Training for leisure users of the waterway*

In addition to these suggestions, a number of positive comments were made about the Port's activities including, "POMH do enough already - you just need to celebrate your achievements."

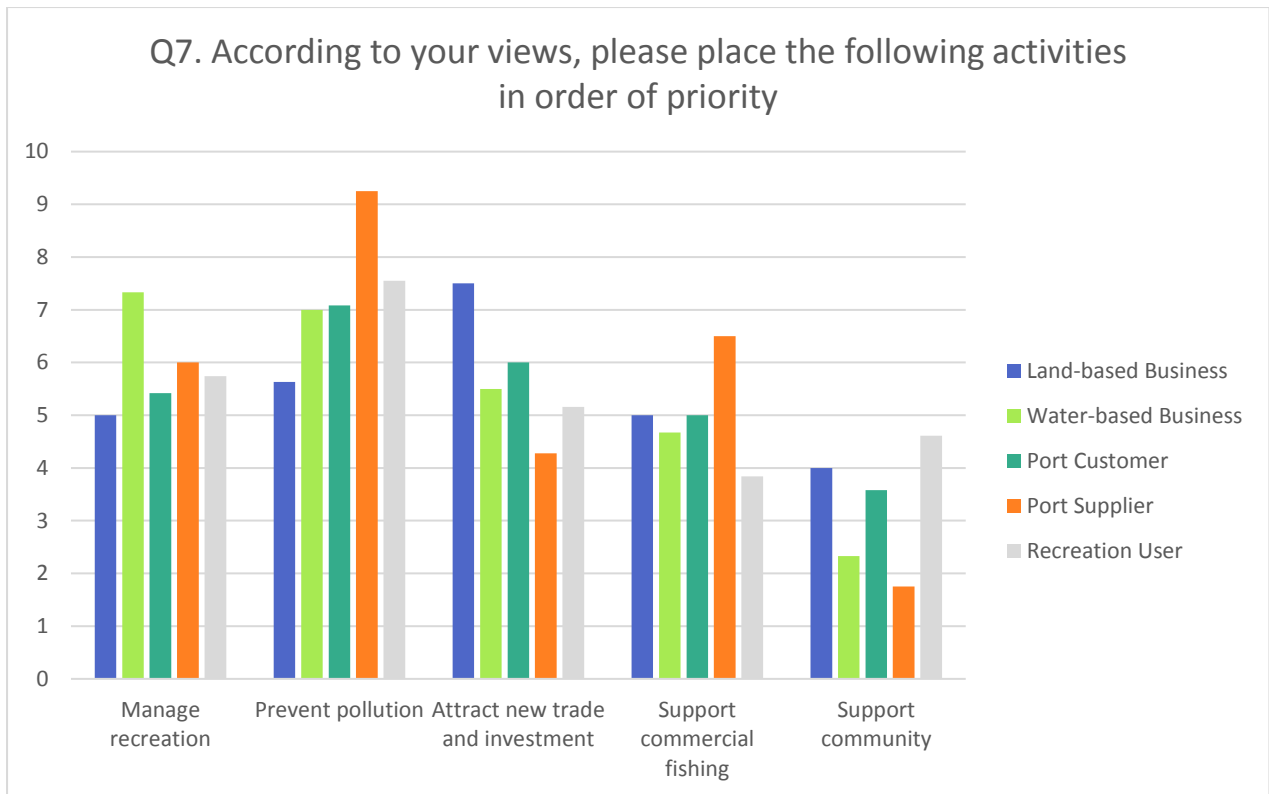
3.4 The Port's Priorities and Performance

Q7 asked respondents to place 10 of the Port's activities in order of priority, according to their views. To analyse the data, each time an activity was ranked 1st it was awarded 10 points, 9 points for 2nd, 8 for 3rd 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).

1. Ensure the safe movement of vessels on the Milford Haven Waterway (8.20)
2. Prevent pollution (7.05)
3. Support existing Pembrokeshire-based businesses (5.71)
4. Attract new trade and investment to Pembrokeshire (5.37)
5. Manage recreation on the Milford Haven Waterway (5.273)
6. Promote tourism in Pembrokeshire (5.269)
7. Support the commercial fishing industry around Pembrokeshire (5.00)
8. Invest profits to promote the marine renewables industry in Pembrokeshire (4.56)
9. Invest profits to make Milford Waterfront a leading retail and leisure destination (4.30)
10. Support the Pembrokeshire community and community-based organisations (4.27)

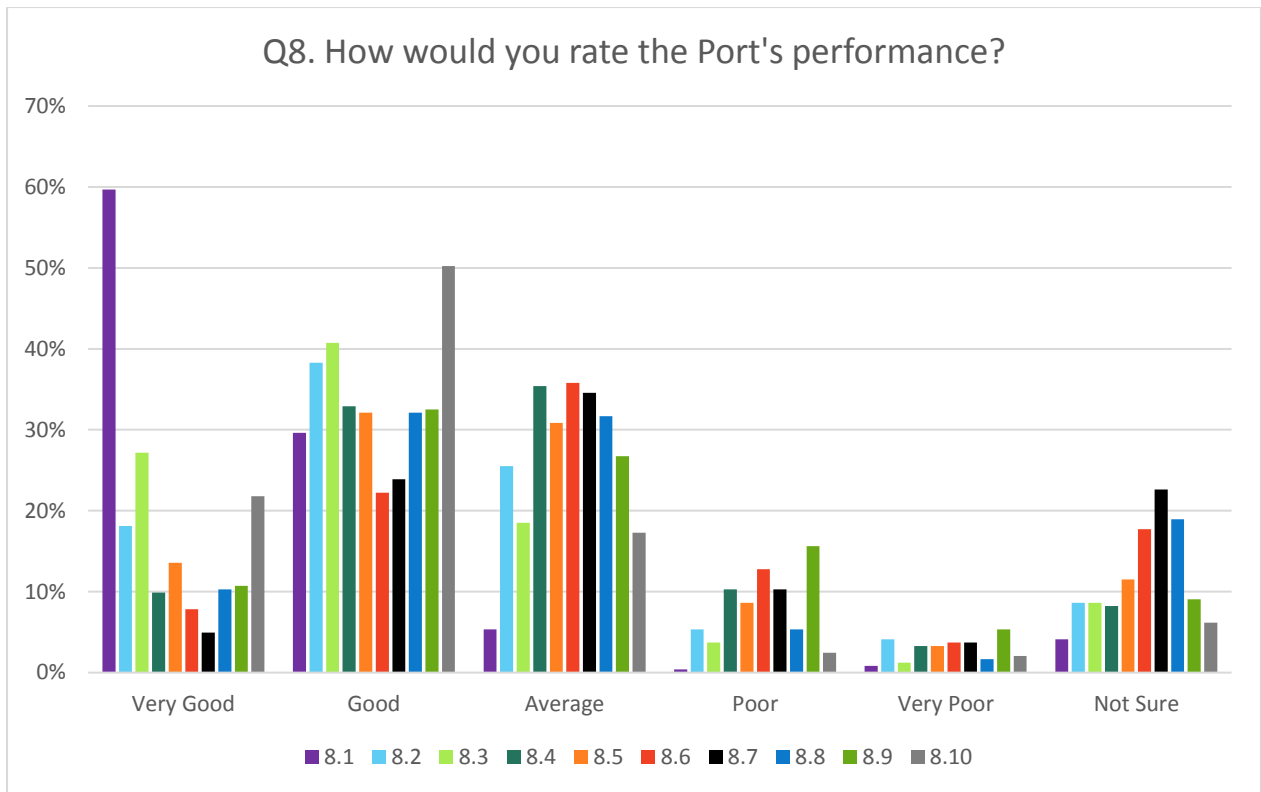
When comparing these results to last year's survey, the same activities appear as the top 5 priorities. The top 2 answers remain the same, but there are a few differences in the other rankings. 'Supporting existing businesses' and 'managing recreation' have swapped rankings (they were 5th and 3rd respectively) whilst 'attracting new trade and investment' remains in 4th. 'Investing in renewables' was 10th last year but has now moved up to 8th, perhaps due increased awareness of this new industry. Although 96% of those taking part in this survey felt that it was important for the Port to support community based organisations, when asked to prioritise activities this was ranked 10th.

The graph on the following page breaks down these results to show 5 activities where there are noticeable differences between key stakeholder groups. As the graph show, water-based business owners clearly see 'managing recreation' as a greater priority than any other group, and Port suppliers favour 'preventing pollution' over any other activity. When comparing the 5 stakeholder groups identified in the graph, for both of these activities land-based business owners gave the lowest ranking, but they were clearly in favour of 'attracting new trade and investment' far more than any other group. There is clearly a large difference in the scoring between land-based businesses owners and suppliers of goods/services to the Port, similarly the suppliers were the lowest ranking for 'support the community'. They were however the group most in favour of 'supporting the commercial fishing industry'.



NB. The higher the score, the more often the activity was ranked as high priority

There was strong evidence that stakeholders felt more informed of the Port’s activities than in previous years. In 2016, 40% of respondents said they were unsure of the Port’s performance in supporting the renewables industry, compared to 19% in 2017. Similarly, there was increased awareness of the Port’s efforts in attracting new trade and investment with only 18% of stakeholders being unaware of the Port’s performance in attracting trade and investment, compared to 37% in 2016.



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 tourism in Pembrokeshire

8.5 Supporting existing Pembrokeshire-based businesses

8.6 Attracting new trade and investment to Pembrokeshire

8.7 Supporting the commercial fishing industry around Pembrokeshire

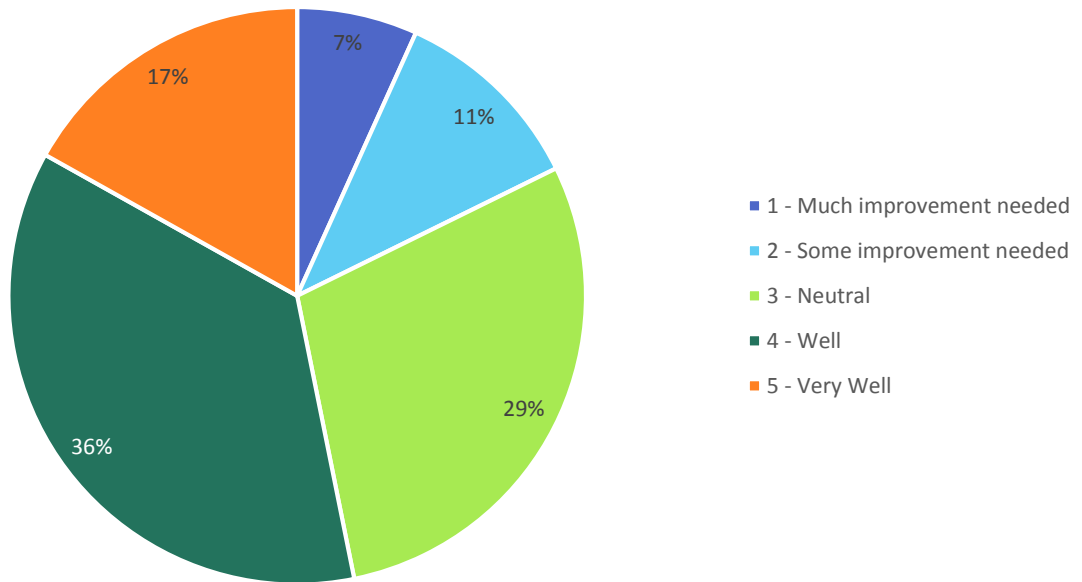
8.8 Promoting the renewables industry in Pembrokeshire

8.9 Developing Milford Waterfront as a leading retail and leisure destination

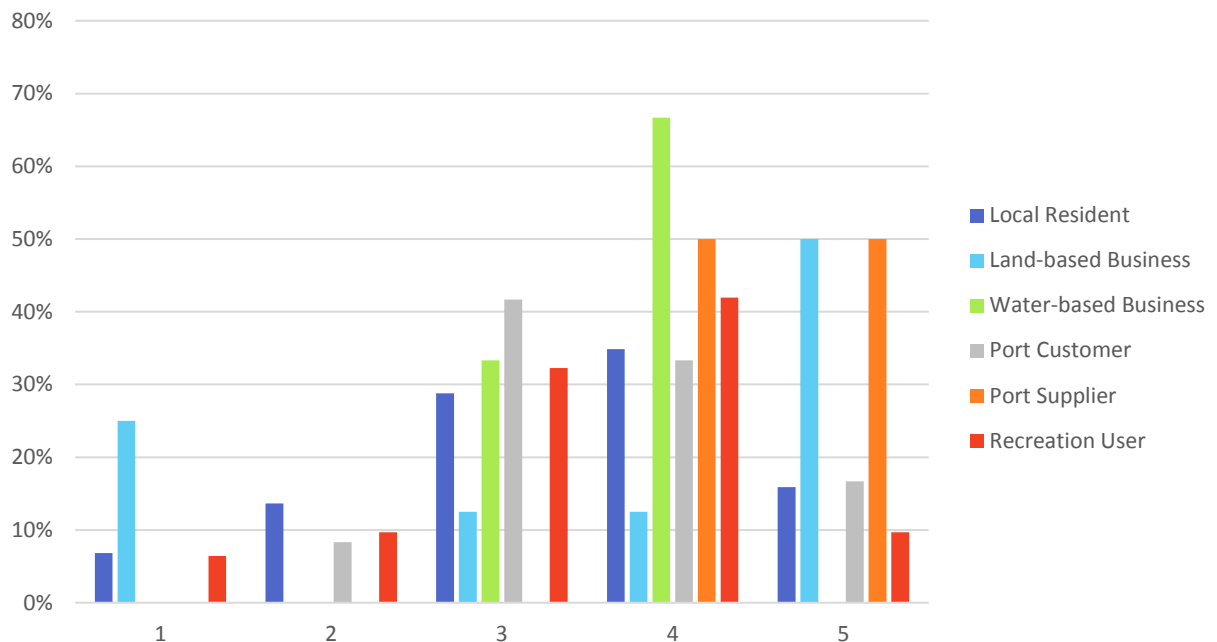
8.10 Supporting the community and community based organisations

When asked how the Port was performing against their overall expectations (Q9) 82% of respondents ranked the Port as a 3, 4 or a 5 which is a 14% increase from last year. Overall, Port suppliers and water-based business owners were the most satisfied as 100% ranked the Port as a 3, 4 or 5. Port customers and recreation users were also very satisfied with 92% and 84% respectively ranking the Port as a 3, 4 or 5.

Q9. How is the Port performing overall against your expectations?



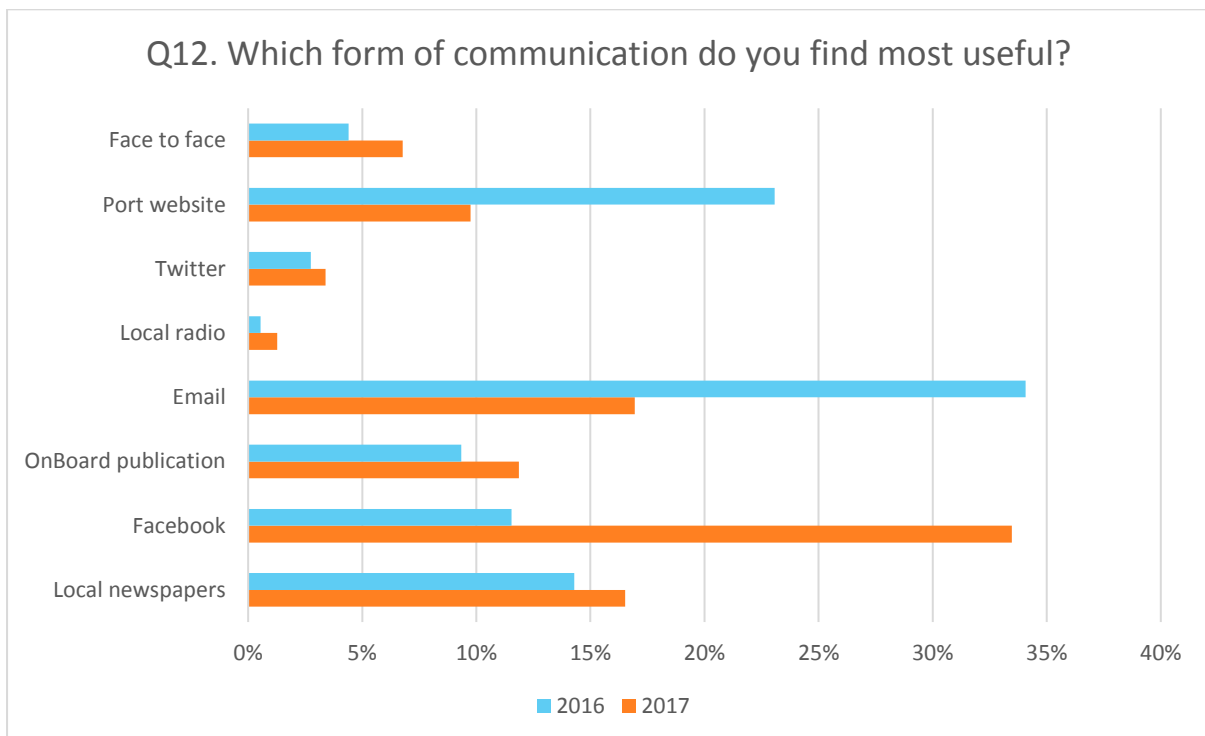
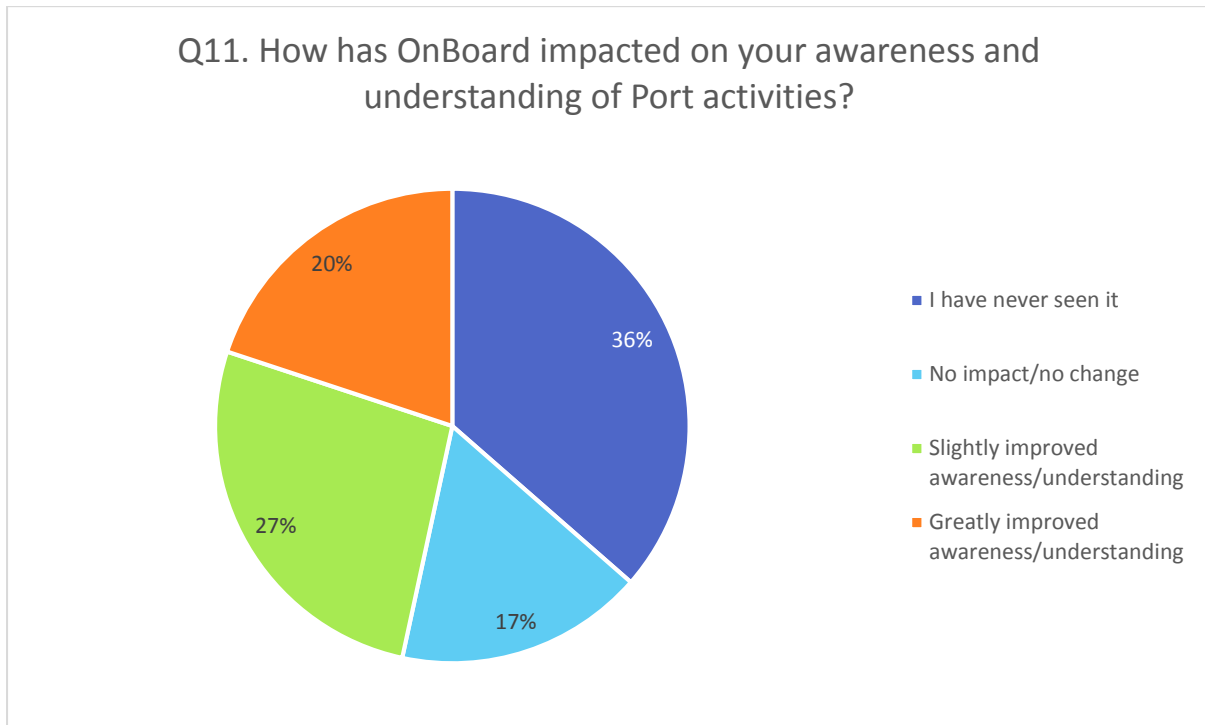
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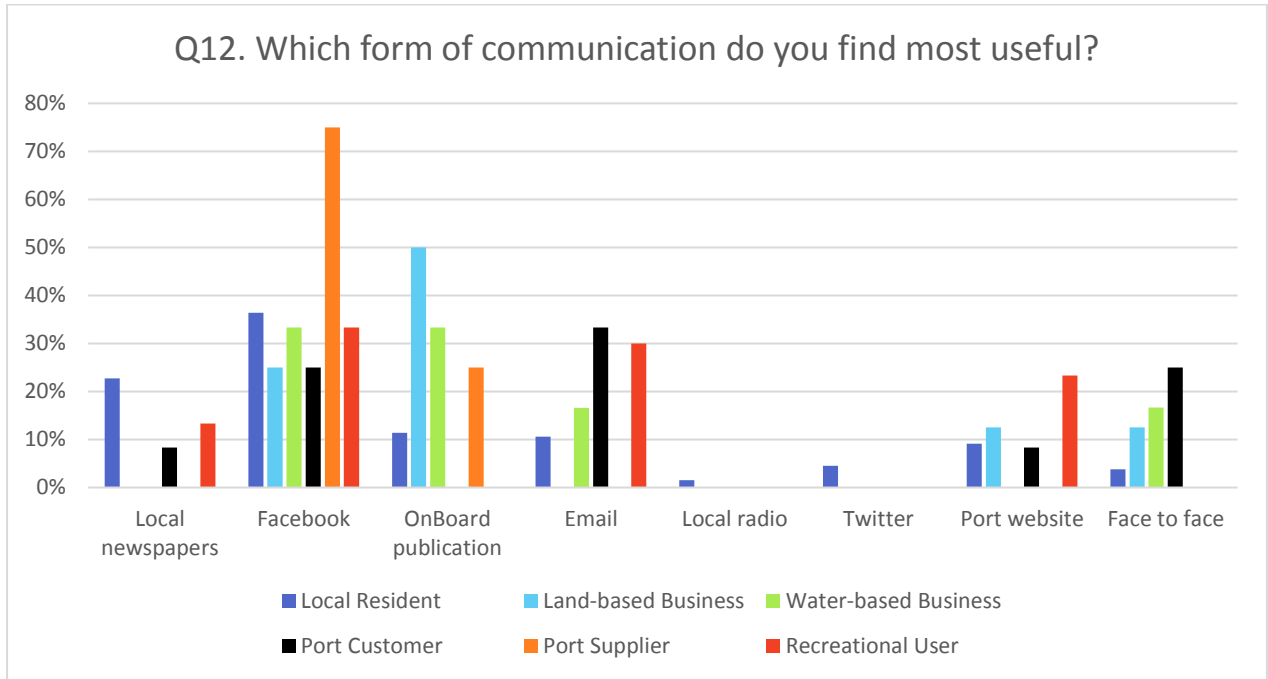
When asked in Q10 if they had any concerns regarding the Port's activities, 68% said no.

3.5 Communication

Q11 gave respondents a description of the OnBoard publication and asked how it had impacted their awareness and understanding of the Port. 47% responded positively, which is a 5% increase compared to 2016. The number of people that had never seen OnBoard has dropped by 7% since last year.



Q12 asked respondents which form of communication they find most useful for keeping up to date with Port news and developments. There has been a 22% increase in the amount of people favouring Facebook compared to 2016. The amount of people preferring communication via email has dropped by 17% and those using the Port’s website has reduced by 13%.



4. Conclusion

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

- A large majority of people undertaking this survey were local residents and nearly half lived in or within 5 miles of Milford Haven, demonstrating the strong links between the Port and the town. As respondents were only able to choose one category to define themselves as (in 2016 they could choose multiple) it is difficult to tell whether the 58% who said they were local residents also had other links to the Port. There were also people participating in the survey from all over Pembrokeshire and further afield which reflects the Port's far-reaching influence. Customers and suppliers rated the service they receive from the Port favourably.
- The majority of respondents agreed that the Port should be undertaking a range of different activities, particularly supporting local businesses and attracting new trade and investment. There was a 13% increase in those who strongly agreed with the Port's role in renewable energy compare to 2016. 60% strongly agreed that the Port should be investing in the development of tourism.
- The Port has consistently supported the community through a broad range of initiatives including sports clubs, community groups and local societies, as well as organising and sponsoring events. In 2016, 89% agreed that the Port should continue supporting the community, and in 2017 this has increased to 97%. 7% more people feel that it is important the Port remains a Trust Port. Many suggestions were provided regarding other activities the Port should get involved in, many of which were suggested in the 2016 - such as more events and more work with schools. There were also many suggestions regarding investment into infrastructure and other development opportunities which the Port may want to consider.
- 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). The number of people responding 'not sure' when asked to rate the Port's performance has decreased, suggesting there is a better understanding of the Port's work. Overall, 53% said the Port were meeting or exceeding their expectations, 2.6% more than in 2016.
- There has been a 5% increase of positive responses towards the OnBoard publication and Facebook is by far the most popular method of communication.

5. Appendices

Appendix A

Survey Questions for 2017 survey

Appendix B

Stakeholder groups identified for 2017 survey

Appendix C

Raw Data from 2017 survey

Appendix D

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?