

PACCo Project Overall Summary of Analysis of Visitor / User Survey Results in the Lower Otter and Saône Valleys

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About this summary report

This is an overview of the full reports of the results from the Lower Otter and Saône Valley visitor / user surveys – summaries of selected questions from the survey results are presented separately below, with some comparative aspects drawn out in the Saône Valley summary. The full reports will shortly be available via the [PACCo website \(reports section\)](#) of the downloads page). The surveys were delivered through a mixture of face-to-face and online surveys in 2021/2022. They targeted both local residents and visitors and were carried out by ABPmer (Lower Otter) and the Conservatoire du littoral (Saône Valley).

The surveys covered the following main themes:

1. **Typical use of the sites** - how respondents use the sites, frequency of visits and spend;
2. **Perceptions about the sites** - as they are at present;
3. **Plans for the future** – changing knowledge and perceptions with regard to the project schemes and climate change impacts;
4. **Local decision-making and communication** - stakeholder communication and consultation and communication tools used for the project; and
5. **Demographic characteristics** – gender, age, employment status etc of respondents.

Although broadly the French (Saône valley) and English (Lower Otter valley) surveys were developed to be comparable, the Saône valley survey incorporated more questions, especially related to climate change. On the other hand, the Lower Otter survey, because it was repeated, enables some comparison between views and perceptions in 2021 and 2022. There were also some differences in terms of themes. The French survey contained more emphasis on the effects, risks and hazards of climate change than the English survey, but less emphasis on disruption as a result of construction works, influenced by the differences in phasing and extent of the construction work in the two sites. Only one round of surveys was conducted in the Saône valley.

Summary Results of the Lower Otter Survey 2021 and 2022

This analysis is based on 334 valid survey responses (88 of which were face-to-face) in 2021 and 269 valid responses in 2022 (41 of these were from in-person interviews).

Visit frequency: For the Lower Otter survey, respondents stated that they tend to visit fairly frequently - around 50% of respondents indicated they visited at least 1-3 times a week; with 5% visiting more than once a day (2022 figures). 18% of respondents visited 1 to 3 times a week, and 17% 1 to 3 times a month (2022); respondents stated that they visited slightly more frequently in 2022 than 2021 (Q6a).

Proportion of residents and visitors surveyed: The majority of respondents were local residents - in 2021 the split between local residents and visitors was 79% to 21%¹. In 2022 this was even more pronounced with 84% local residents and 16% visitors (Q4a).

Proportion of day visitors / those staying in holiday accommodation: Of those respondents who were not local residents (68), 46% stated they were day visitors and 37% staying in holiday accommodation, with 9% staying with friends / family² (2021 figures). In 2022 there were slightly less day visitors and more staying in holiday accommodation, but the number of responses was small (32 in total) so this may not be representative (Q4b)).

Length of stay for holidaymakers: A significant proportion of holidaymakers are staying for several days - in 2021, 33% of holidaymakers indicated they stayed for 7 days; 40% that they stayed for 7 days or more (up to 21 days). In 2022, this was up slightly with around 50% indicating they stayed for 7 days or more, and 22% staying for 7 days. However, the numbers are again very small (only 33 responses in 2021 and 18 in 2022) so are unlikely to be representative (open-ended question 4c)³.

User / visitor group composition: In 2021, most (41%) of respondents visited with family / children, with around 20% visiting with family and friends, 19% with partner / spouse and 9% visiting with friends. Compared with the previous year, in 2022, a higher percentage of respondents visited with a partner / spouse (34%; up 15%) and with friends (+3%). (This may have been influenced by Covid restrictions in place the previous year.)

Spend: The stated spending profile while at the site (including Budleigh Salterton town centre) showed a range of £0 - 200 (2021); and of £3 - 800 (2022); with a median spend of £10 for both years (Q7). This includes spending in local shops, including food shops, charity shops and antiques shops, as well as for parking etc., but not for accommodation.

Characteristics of the site most valued by respondents⁴ were 'wildlife', 'scenery', 'nature' and its 'peaceful' and 'beautiful' quality and (summary of 2021 and 2022 responses) (Q9a).

Characteristics of the lower Otter valley valued least⁵ in 2021 were 'people' (referring to visitor pressure); narrow paths (during Covid making it difficult to do social distancing); and dogs (dog poo also featured in responses). In 2022 the most frequently cited responses were again 'people' (referring to visitor pressure and perceptions around inconsiderate dog owners, with reference to

¹ Q4a: "Do you live locally (within a few miles / km)?"

² Q4b "Do you typically stay overnight (nearby), or just visit for the day?"

³ Q4c "Please specify length of stay (in days)".

⁴ Multiple response question - Q9a: "What do you like best about the lower Otter valley?"

⁵ Multiple response question – Q9b: "What do you like least about the lower Otter valley?"

wildlife disturbance); and disturbance / pollution related to the construction works, including construction vehicles and disruption to normal parking arrangements / availability (Q9b).

'Natural' characteristics of the site: Most respondents (56%) perceived the valley / estuary as very natural in 2021 (Q10)⁶ – this probably reflects the appreciation of the natural features present in the valley prior to the scheme, but does not indicate a great deal of awareness of past human-influenced changes to the valley (e.g. the building of the embankment, railway, draining of the valley to make way for the development of agriculture etc). There was a reduction of 13% for this view in 2022 (slightly modified question)⁷. This is likely to have been influenced by the start and visibility of the construction works in 2022.

Positive/negative feelings about the scheme: General feeling expressed about the scheme was mostly positive (or neutral) in 2021 (Q12b: agreement with statement 'I am very happy that this scheme is happening') with 44% selecting 'agree/completely agree', 32% selecting 'neutral' and 25% negative (disagree/completely disagree). In 2022 the results were similar but responses at the extremes were slightly higher showing slightly greater polarization of views (completely agree 6% greater; completely disagree 4% higher).

Awareness of climate change impacts as a result of the project: The project seems to be having some positive impact on awareness of issues around climate change in coastal communities. In 2021 33% of respondents stated that their awareness of climate change and its impacts on coastal communities had increased as a result of the lower Otter restoration project - 23% selected 'agree' and 10% 'completely agree' (Q12c). A slightly lower proportion, 27%, selected 'disagree' or 'completely disagree' and 33% selected 'neutral / neither agree nor disagree'⁸. Again, the responses for 2022 were similar apart from a slight increase at the extremes.

Concerns about the project: The most frequent concerns expressed about the project (Q13; open ended) included about impacts on local wildlife (terrestrial and marine) during the construction phase and due to land-use changes; over-engineering of nature and disruption caused by the construction works. Other concerns expressed in 2022 in addition to the above were changes to the nature of the site (including change / loss of existing habitat); and accessibility (including site access, footpaths, roads and parking).

Benefits of the scheme expressed by respondents in 2021 (Q14)⁹ included improvements to flood risk and resilience to climate change (24% of responses); increases in biodiversity (20%) and natural habitat increases (16%). In 2022 the responses were similar except that wildlife was the most mentioned (27%), with flooding improvements (27%), habitat creation / restoration (23%) and an additional type of benefit mentioned - economy / infrastructure benefits (16%).

Effects on the attractiveness of the valley: In 2021 the majority of respondents (45%) thought the scheme would make the lower Otter Valley a more attractive landscape compared to only 18% who

⁶ Q10: Agreement with statement "The valley/estuary as it is at present is very natural." 56% includes 'agree' and 'completely agree'; 27% selected 'disagree' or 'completely disagree' and 17% selected 'neutral/neither'.

⁷ Q10 modified for 2022: Agreement with statement "Besides the construction works, the valley/estuary as it is at present is very natural." There was a 10% reduction in those selecting 'agree' and 3% for 'completely agree'.

⁸ Q12c: Agreement with the statement "Thanks to the LORP, I am much more aware of climate change and its impacts on coastal communities"

⁹ Multiple response question – Q14: "What do you see as benefits of the scheme – now and future?"

expressed a negative view (and 26% neutral) (Q15c)¹⁰. Interestingly, in 2022 the 'completely agree' rating for this question increased by 13% compared to 2021.

Impacts of the new wetlands for the area: In 2021, 52% of respondents perceived the new managed wetland environment as being positive for the local area (Q15d)¹¹ with only 15% perceiving it as being negative and 22% selecting 'neutral'. However, when split between visitors and local respondents, a greater proportion of visitor respondents selected positive responses (as well as 'not sure'). The responses were similar in 2022 with 50% perceiving the new wetland environment as positive for the local area.

Impact on the local economy: Perceptions about the impact on the local economy were less clear, however, with 26% agreeing that the new managed wetland environment will benefit the local economy but 30% of respondents selecting a neutral view, 17% stating a negative view and 16% selecting 'not sure' in 2021¹². In-person respondents expressed uncertainty about the future and an inability to predict the impacts of the proposed scheme at the time. The responses in 2022 showed a 9% increase in the 'completely agree' response category and a decrease of 5% for 'neutral' and 8% for 'not sure'.

Disruption caused by the construction works (question asked in 2022 only): 26% of respondents indicated that they had experienced disruption to date and 23% indicated a lack of disruption, with 22% neutral (Q15f)¹³.

Information provision as part of the consultation process: Regarding information about consultation carried out as part of the lower Otter scheme (Q16), the most frequently cited sources of information were a newspaper, social media and the website; with the planning application consultation and the public meetings also featuring.

Perceptions of the consultation: On the consultation process itself the views seem to be neutral or evenly split, with 48% of respondents stated a neutral view in response to the statement "The consultation for the LORP was very genuine, and I felt like I was listened to"; with 17% positive and 17% negative (Q17a). Similarly, with regards effectiveness and timeliness of the consultation, 42% of respondents expressed a neutral view; with 16% expressing a positive view and 16% 'not sure' (Q17b)¹⁴.

Suggestions for improvement to the consultation process: these included that provision of more information would have been beneficial, along with more acceptance / taking on board of local views (Q18)¹⁵. However, aspects of the consultation that were perceived as having gone well included the plethora of information provided to the public about the scheme (44% of responses); the fact it was 'well publicised' (28% of responses) and that it was 'helpful' (7% of responses)

¹⁰ Q15c: Answers in response to statement "The Lower Otter Valley will become a much more attractive landscape as a result of the scheme". Responses reported above aggregate the 'agree' (31%) and 'completely agree' (14%) categories (45%); and the 'disagree' and 'completely disagree' categories (18%).

¹¹ Q15d: Answers in response to statement "The new managed wetland environment will be very good for the local area". 35% selected 'agree' and 17% selected 'completely agree'.

¹² Q15e: Answers in response to statement "The new managed wetland environment will be very good for the local economy".

¹³ Q15f: Answers in response to statement "The constructions works have not been disruptive to date": 26% 'disagree'; 23% 'agree'; 22% 'neutral/neither agree nor disagree'.

¹⁴ Q17b: Answers in response to statement "The consultation for the LORP was very effective, and I felt I had the chance to contribute in a timely fashion."

¹⁵ Q18: "How could the consultation have been improved?"

(Q19)¹⁶. In terms of which consultation methods were preferred, the top three were social media, the project website and newspaper article (Q20). Multiple mentions were also made of face-to-face contact with town officials and Environment Agency staff as being helpful, as well as local people helping them form opinions of the scheme.

An open question on any thoughts the respondent wished to share about the consultation yielded only 50 valid responses, with 37% expressing general negative feelings towards the project, 22% expressing lack of clarity of the consultation 14% raising concerns about the local wildlife (Q21)¹⁷.

Demographic characteristics

Gender: there was a roughly even split of female/male. 52% respondents stated they were female in 2021, and 31% male, but 12% of responses were by mixed couples, i.e., a male and female answering the survey together, producing a larger 'other' response. 50% of respondents stated they were female in 2022, with 48% male.

Age: The age profile shows that a large proportion of older and retired people participated in the survey. The majority (45%) of those who responded indicated they were in the '65 and over' category (74 respondents skipped this question) (Q23).

Educational level attained: Responses to the question about highest educational level attained of respondents indicates a range of levels attained, but with a skew towards relatively well-educated respondents, with undergraduate degree (20%), professional qualification (20%) and postgraduate Masters qualification (19%) accounting for the majority of respondents (Q24)¹⁸.

Employment status: Similarly to the age question, 45% of respondents selected 'retired' as their primary employment, with 25% selecting 'employed full time' (2021 figures; 2022 figures were 43% and 30% respectively)¹⁹ (Q25).

¹⁶ Q19: "What was done well?"

¹⁷ Q21: "Please use this text box if there are any other thoughts you would like to share".

¹⁸ Q24: "Which of the following academic qualifications do you have? Please tick the highest level attained, or nearest equivalent:..."

¹⁹ Q25: "What is your employment status?"

Summary Results of the Saâne Valley Visitor / User Survey 2022

A total of 347 valid questionnaires were collected and analysed for the Saâne valley, including 96 completed online, 5 on paper, and 246 (>70%) in person (face-to-face).

Visit frequency: In the Saâne Valley, users indicated they visit fairly frequently (although the frequency reported was slightly less than for the Otter Valley). 38% of respondents visit at least 1-3 times per week (11% of these visit either daily or more frequently)²⁰. Therefore, just under two thirds (62%) of respondents visit less frequently than once a week.

Features of interest and activities: Various features were highlighted as of interest by respondents: the river, the beaches and cliffs (for hiking and foreshore fishing) and wetlands (lower Saâne valley). The varied landscape enables a variety of outdoor activities: in question 6 ("What are the main activities you do in the valley?"), the most cited outdoor activities were walking, beach activities and wildlife watching (there are several long distance and local hiking trails in the area). The data shows that the quality of the natural and landscape heritage is important for the users of the site: almost 50% cited the observation of fauna and flora as their main activity, with 28% citing photography.

Proportion of residents and visitors surveyed: Of the 347 respondents, around 60% indicated that they were 'residents' (209 respondents; based on data from more than one question).

Proportion of day visitors and length of stay for holidaymakers: 85% of visitors stated they stayed at least one night (only 7% were day visitors). The information reported indicates that around 60 families stay for extended periods (in summer at the municipal campsite) and the median value for length of stay was 10 nights. This underlines the importance of the municipal campsite for the local economy (especially in summer).

User / visitor group composition: The data indicates that users of this valley are mainly residents or holidaymakers who come to the lower valley with their families. Only 11% of the respondents were in the 18-29 age group (Q37); and only 11% stated they visited with friends.

Characteristics of the site most valued by respondents (positive associations) (multiple questions): Most frequently cited word associations with the valley were 'natural' / 'nature', with 'calm', 'beach', 'beautiful' and 'sea' also featuring strongly. In a related question²¹, the responses were similar, with respondents stating they also valued the countryside, landscapes, summer atmosphere and outdoor activities (hiking). A separate question highlighted the wellbeing felt by users of the Saâne Valley; more than 95% of respondents agreed with the statement, "The valley is quiet and rejuvenating, I feel good here."

Characteristics of the site least valued by respondents (negative associations) (multiple questions): Only a few negative associations were mentioned in the word association question, such as the dam, a lack of activities, pollution, over-tourism, developments (impact on the landscape), the culvert, vehicle traffic and the lack of a cycle path. Similarly, in a related question²², respondents mentioned the lack of cycle paths, the presence of the concrete road-dike, the over-tourism in summer and its

²⁰ This figure is slightly lower than for the Otter valley (50%).

²¹ All question wording provided here has been translated. The original questions can be found in the full French survey results. Question wording: "What do you like most about the Saâne valley?"

²² "What don't you like about the Saâne valley?"

consequences (pollution, waste), the dangerous traffic (sharing of traffic lanes by cars, bicycles and pedestrians), and the lack of activities or restaurants.

'Natural' characteristics of the site: Almost 88% of respondents perceived the valley as it is today as natural²³.

Visitor pressure: Less than 30% of respondents indicated that they felt the site was overcrowded in summer, although a spatial analysis suggests that residents of areas close to the beach / seafront (near shops, cafes etc) did perceive it as overcrowded, whereas in the lower valley they did not.

The data presented indicates that the number of visitors to the Quiberville municipal campsite increased significantly in 2022 compared to previous years (including 2019) likely due to a post-COVID effect: the search for natural outdoor spaces and constraints of international travel opportunities having led to more local holidaying or 'staycationing'.

Awareness of / knowledge about climate change, risks and hazards (multiple questions): perceptions about respondents' own knowledge of climate change was variable, with 49% of respondents indicating they had good or very good knowledge about climate change, but 51% stating they did not have good knowledge. However, awareness of climate change and associated risks / natural hazards was much higher: 94% of people considered the Saâne Valley to be vulnerable to climate change, with nearly 90% of respondents perceiving the lower Saâne valley as subject to one or more natural risks. The related natural hazards cited included flooding (most commonly mentioned - 87% of respondents who mentioned a hazard), run-off, erosion and cliff erosion / recession. Of resident respondents, around 60% felt their homes were affected or could be affected by natural hazards (half of which identified flooding as the major risk); compared to about 37% who felt that their homes were not affected by natural hazards. Over 80% of respondents felt that the dyke / sea defences were not adequate protection against the risk of flooding from the sea. Survey responses also indicated significant awareness of historical flooding events (in 1999 and 2018).

Support for different climate change adaptation options / solutions: almost 47% of respondents were in favour of letting nature take its course, with nearly 31% supporting the maintenance of sea defences and groynes²⁴. 20% of respondents were in favour of relocating populations and services²⁵.

Awareness of climate change impacts as a result of the project: Around 45% indicated that they now have better knowledge of climate change and its impacts on coastal areas as a result of the project (PACCo and Basse Saâne), with 22% saying the project has had no such effect²⁶.

Effects on the attractiveness of the valley: More than 80% of respondents thought the project would make the Saâne valley more attractive, with only 7% disagreeing with this view²⁷.

²³ Agreement with the statement "The Saâne valley as it is now is natural" (includes responses for 'agree' and 'fully agree'). This figure is much higher than for the comparable question in the lower Otter valley, although the wording was stronger for the Otter valley question – 'very natural' (only 56%).

²⁴ As the number of people who support the maintenance of sea defences / groynes is higher than the number who think they provide adequate protection from flooding, this implies greater investment would be needed into the dyke / raising of the structure.

²⁵ Question wording: "What do you think would be the best solution to adapt to climate change?"

²⁶ Question wording: "Thanks to the territorial project, I am more informed about climate change and its impacts on coastal municipalities" (includes responses for 'agree' and 'fully agree').

²⁷ Question wording: "The landscape of the Saâne Valley will be more attractive as a result of the implementation of this project" (includes responses for 'agree' and 'fully agree').

Impact on the local economy: Similarly, 78% of respondents thought the project would be beneficial for the local economy, with only 15% disagreeing.

Benefits for biodiversity of the project: 90% of respondents agreed that the project would benefit biodiversity²⁸.

Concerns about the project: The most frequently expressed concern was regarding the economic benefits of the project, especially the new campsite (which is reported to be targeting a different clientele than the current municipal campsite) - it is likely that many users of the campsite were respondents of the survey. Other frequently expressed concerns were safety of homes / residents; environmental benefits (impact of restoration of flood plain on particular species); attractiveness of the site and over-tourism (accentuating traffic issues and conflicts between vehicles, cyclists and pedestrians). Other concerns mentioned (in a separate open-ended question) included inconvenience caused during the works with problems of access to the seafront or to houses.

Benefits of the project: The benefits most frequently cited were improvement in the quality of the ecosystems; tourism benefits and reduction in vulnerability to natural hazards.

Most effective information sources / communication tools about the project: The most frequently cited media for information and most effective communication tools were the wall newspapers and summer exhibitions; followed by quarterly newsletters, and TV news (based on data from two questions)²⁹. Word of mouth was also cited as important as an information source. Interestingly, websites and social media were the least effective communication tools cited.

Demographic characteristics:

Gender: The gender split of respondents was 52% female and 48% male; broadly consistent with the general characteristics of the local population (51/49%).

Age: Of the 346 responses to this question, the most represented age group was 45-59 (33% of respondents). 31% of respondents were over 60 years old, compared to 36% under 44 years old. This is a younger age profile than the general population (and compared with the lower Otter survey), and may have been influenced by the times and season that the data was collected, when more families with young children were likely to be in the area.

Educational level attained: Around 90% of the respondents were almost equally split across four categories of educational level: "Baccalaureate or equivalent", "BTS or licence", "Professional diploma" and "Master, Engineer, DESS". This shows that the site attracts users from a variety of socio-economic and professional backgrounds. These figures were reported to reflect the general population characteristics.

Employment status: 46% of respondents indicated they were full-time employees; 24% retired; 15% self-employed and 8% part-time employees. (This again reflects the different age profile to the Lower Otter survey.)

²⁸ Question wording: "The Saâne territorial project will benefit biodiversity" (includes responses for 'agree' and 'fully agree').

²⁹ Two questions - question wording: "How did you hear about the project?" and "What are the most effective communication methods in your opinion?"