

Live and Move

Exeter Green Circle Awareness and Usage Survey Analysis

February 2024



Background to the survey

- In November 2023, Live and Move and SERIO (evaluation partner) released an online survey to explore public awareness and perception of the Exeter Green Circle. The survey was built upon and developed from a similar (shorter) survey that was circulated in December 2020.
- It was not a requirement to know about, or to use, the Exeter Green Circle in order to engage with the survey, and respondents were informed that their input could be valuable both in enhancing understanding of this city asset, and in informing its future development.
- The survey was concise and accessible, and required no more than ten minutes of respondents' time in order to complete it.
- Survey distribution was carried out online via Live and Move and Exeter City Council websites and social media channels, via the Live and Move monthly newsletter, and also shared electronically via an existing network of contacts.
- The survey went live on 13 November 2024, and remained open for almost six weeks, before closing on 21 December 2023.
- Survey respondents were offered the chance to be entered into a prize draw to win one of ten £35 'In Exeter' vouchers.
- A total of 731 valid survey responses were received over the course of the six weeks (653 of these completed the full survey). By comparison, the December 2020 survey was open for one week and received 167 responses.
- Where appropriate comparisons have been made between the two surveys (2020 and 2023), **however these should be interpreted with caution due to the difference in reach and sample size.**

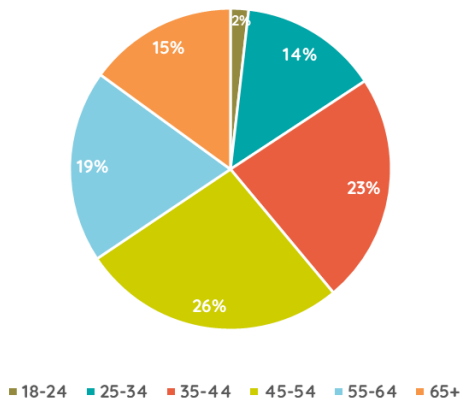
Summary of key findings

- The Exeter Green Circle awareness and usage survey 2023 attracted an already engaged sample, which reported high levels of awareness and prior use of the route (94% having used it). As such, results are more useful in considering how the Exeter Green Circle is currently used, and how it can be improved from the viewpoint of those familiar with the space, than they are in assessing what might make a new audience engage with the space. Having said that, further promotion and advertisement of the route, in order to raise awareness of it, was a high priority for respondents in terms of suggested improvements. Nearly all non-users in the sample stated they were open to trying out the Exeter Green Circle in the future.
- Results indicate the survey sample had a **smaller proportion of 'less active' people** in the sample than in Exeter as a whole (the sample was 52% 'active'; 41% 'fairly active'; and 7% 'less active'). Women made up 61% of the sample, and 60% were over 45.
- The **Ludwell Valley Walk** was marginally more popular than other walks on the Exeter Green Circle, with 82% of Exeter Green Circle users reported having used this particular walk.
- Half of respondents reported using the Exeter Green Circle **a few times a year or less**. Very frequent use of the route was less common, with 17% using it more than once a week.
- **The route is used predominantly for leisure, health and relaxation**. Few reported using it as a means of commuting to work or educational settings.
- Respondents reported using the route both alone and with family/ friends, but **only a small proportion stated that they use the Exeter Green Circle with a club or group**.
- The most commonly preferred means of navigating the route were **following signs or using local knowledge**. A fifth of respondents also preferred a printed map. App use was a less commonly preferred method.
- **Levels of dissatisfaction were highest in respect to signage and the level of available route information**. This sentiment was clearly echoed in the sample's suggestions for improvement. Other suggested areas of improvement included maintenance and improved accessibility options.

Who did the survey engage?

- The survey attracted more responses from those identifying as female, with this group representing 61% of the sample. A further 37% identified as male, whilst the remaining 2% of respondents identified in another way or preferred not to say.
- 60% of respondents were over 45 years old. The 45-54 age category yielded the most respondents, representing 26%, closely followed by the 35-44s (23%), and the 55-64s (19%). Those 65+ represented 15%, whilst 14% were 25-34. The 18-24s represented just 2%.
- It was a largely white sample (88% British white; and 7% non-British white). 1% were of mixed race, 0.4% Asian, and a further 3% were unclassified.
- 10% reported having a long-term physical health condition, and 5% a long-term mental health condition.
- 78% were in employment (55% full-time; 18% part-time; and 5% self-employed). 15% were retired, 1% in education, 1% out of work for long-term health reasons, 1% looking after the household/ children, and 0.6% unemployed.
- 52% of the sample described themselves as 'active', 41% as 'fairly active', and 7% as 'less active.'

Sample age distribution



52%

I'M ACTIVE

I do an average of 150 mins + of sport/ physical activity/ exercise a week.



41%

I'M FAIRLY ACTIVE

I do an average of 30-149 mins of sport/ physical activity/ exercise a week.



7%

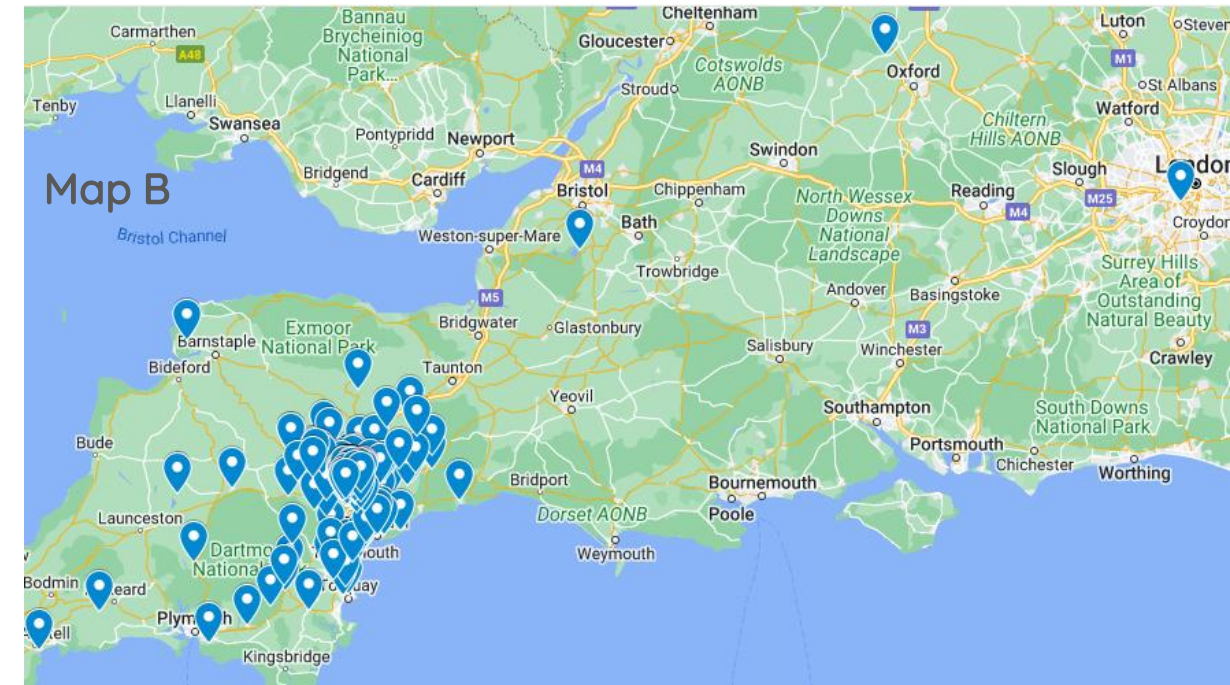
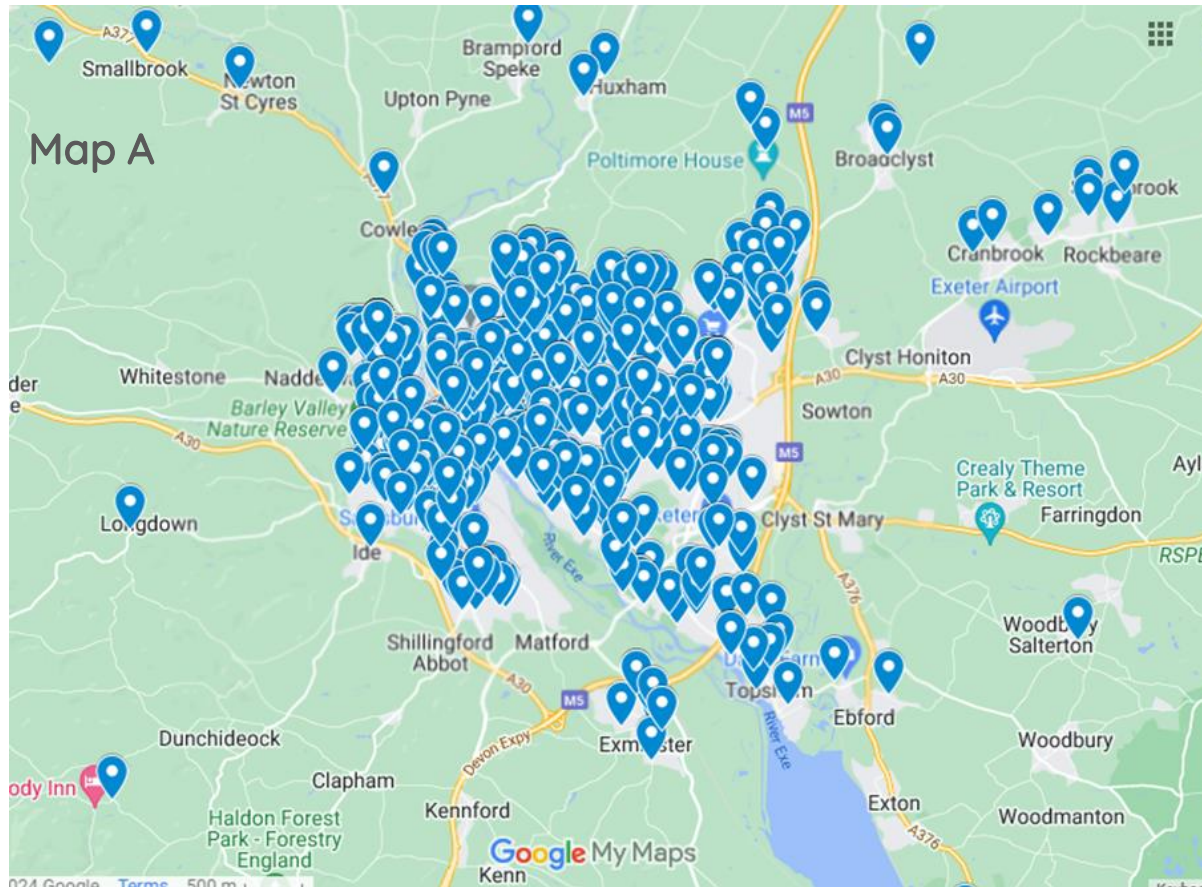
I'M LESS ACTIVE

I do an average of less than 30 mins of sport/ physical activity/ exercise a week.



Where does the sample reside?

- The vast majority of respondents were clustered across the city of Exeter and surrounding areas, as shown in Map A below. Some responses were submitted from further afield, including other areas of Devon such as Plymouth, coastal areas towards Torquay, as well as outliers in North Devon, Cornwall, Bristol, and as far as Oxfordshire and London, as shown in Map B.



Awareness and use of the Exeter Green Circle

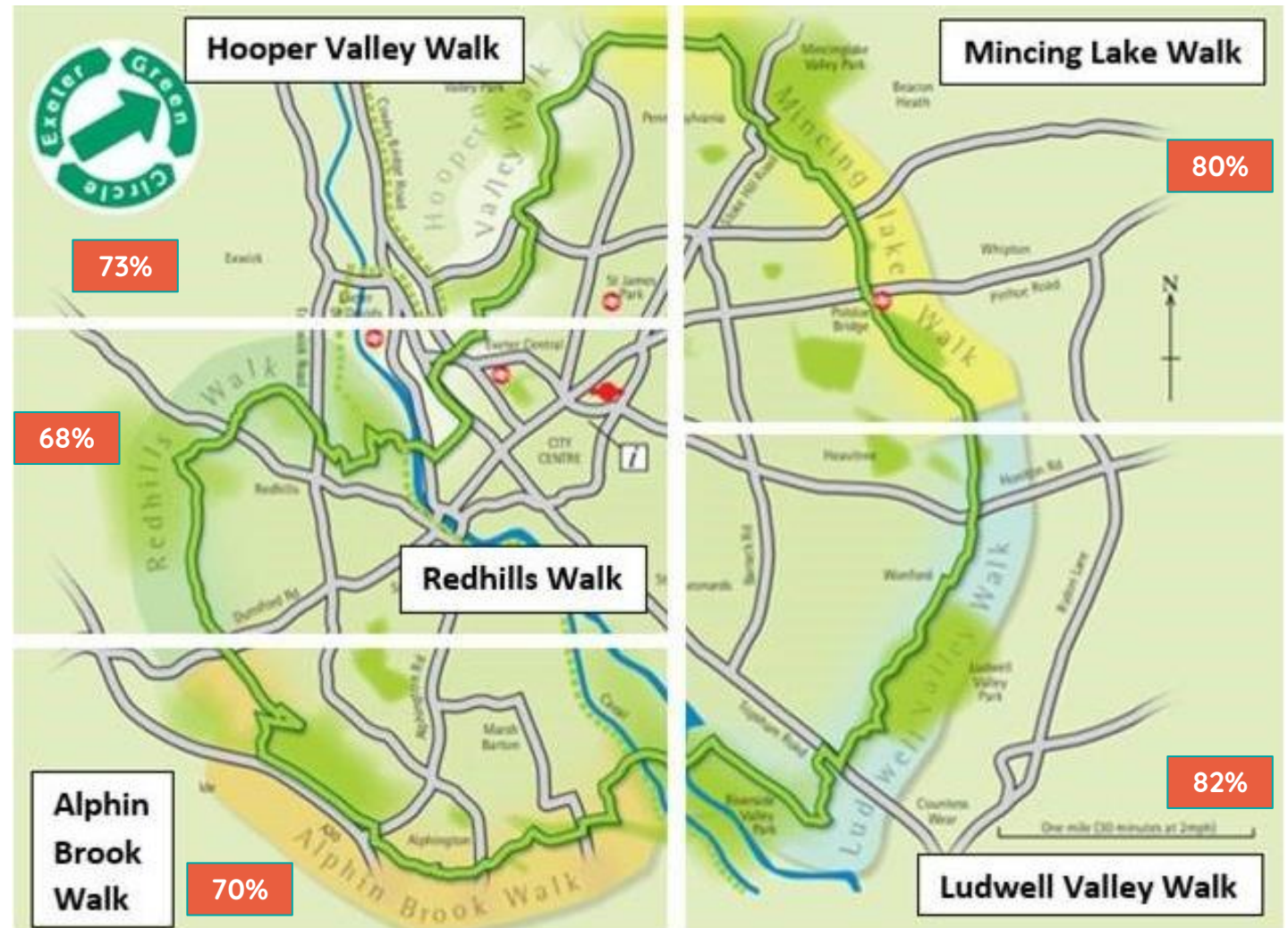
- The vast majority of survey respondents (87%) had heard of the Exeter Green Circle prior to completing the survey (compared to 91% in 2020), highlighting that the sample was already engaged with the route.
- In terms of usage, 94% had walked some or all of the Exeter Green Circle (made up of 83% who knew at the time it was called the Exeter Green Circle, and 17% who hadn't realised it was the Exeter Green Circle they were walking).
- Just 5% had never interacted with the Exeter Green Circle, and 1% of respondents were unsure.



Which areas of the Exeter Green Circle route are being used?

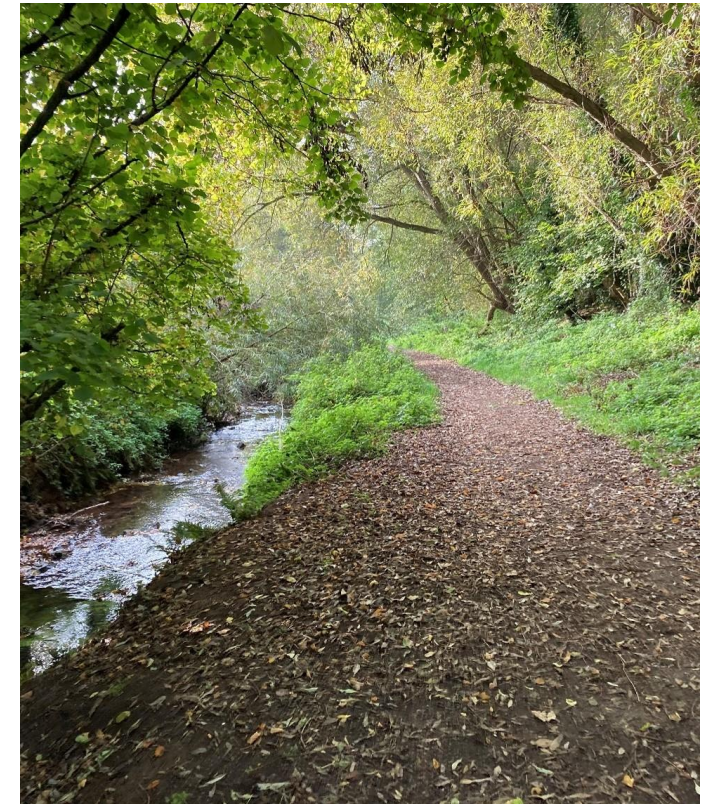
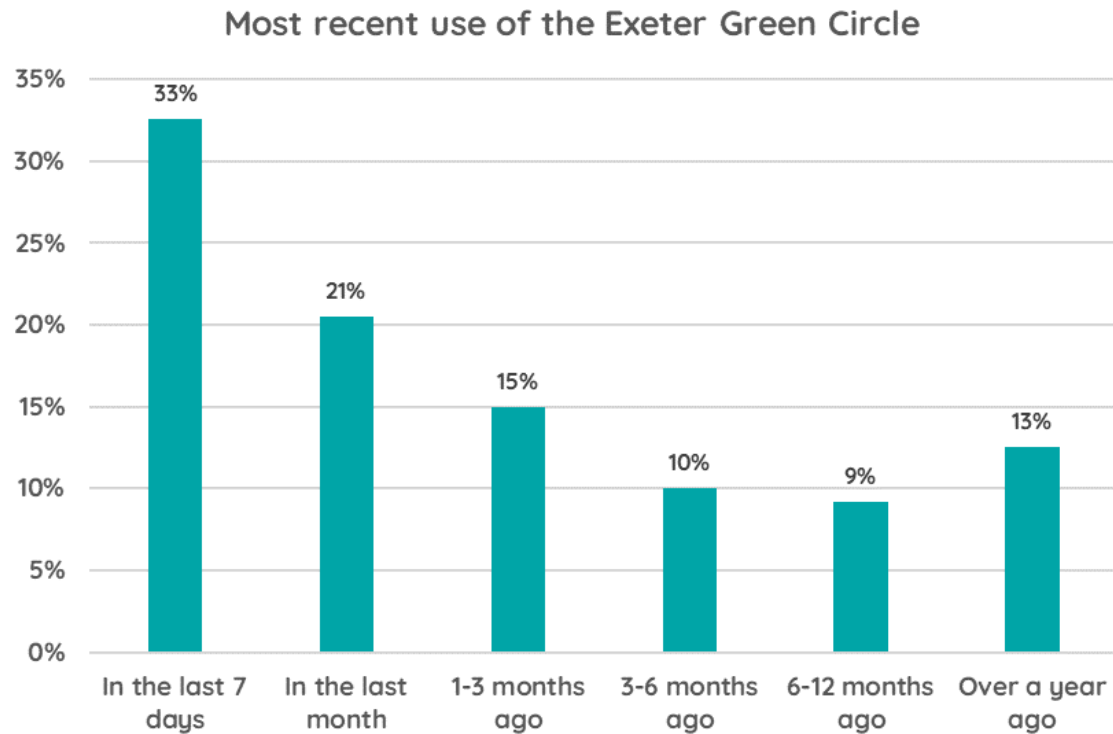
Of those respondents that had used the Exeter Green Circle (94%):

- Ludwell Valley Walk - 82%
- Mincing Lake Walk - 80%
- Hooper Valley Walk - 73%
- Alphin Brook Walk - 70%
- Redhills Walk - 68%



Most recent use of the Exeter Green Circle

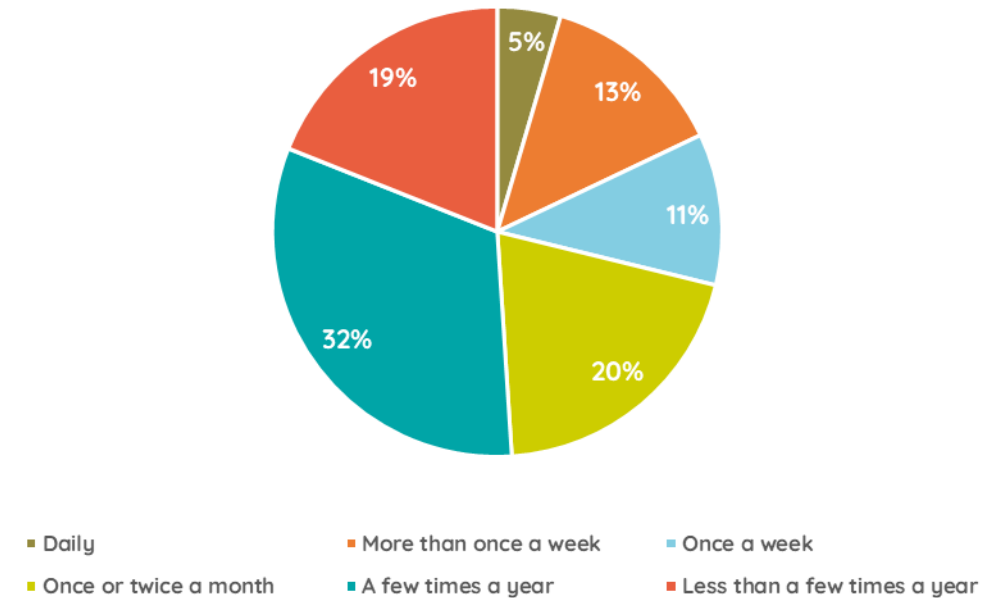
- To provide context to responses, respondents were asked to detail when they last used the Exeter Green Circle.
- Over three quarters of respondents (78%) had most recently used the route within the last 6 months, whereas 22% had last used the route over 6 months ago, indicating that a high proportion of responses were likely to be based on fairly recent experiences.



Frequency of Exeter Green Circle use

- When asked how often they use the Exeter Green Circle, very frequent use was less common; just 4% were daily users (61% of them in the 'active' category), 13% used it more than once a week (73% of them 'active'), and a further 11% used it once a week (71% 'active').
- The majority reported using the Exeter Green Circle a few times a year (32%) or once or twice a month (20%).
- 19% reported usage which was less than a few times a year.
- Around three quarters (76%) of 'less active' users reported using the Exeter Green Circle a few times a year or less, suggesting that the least active category are not frequent engagers with the space.
- 32% of female respondents reported using the Exeter Green Circle once a week or more, compared to 26% of male respondents.
- 36% of respondents under 45 reported using the Exeter Green Circle once a week or more, compared to 26% of those who were over 45.

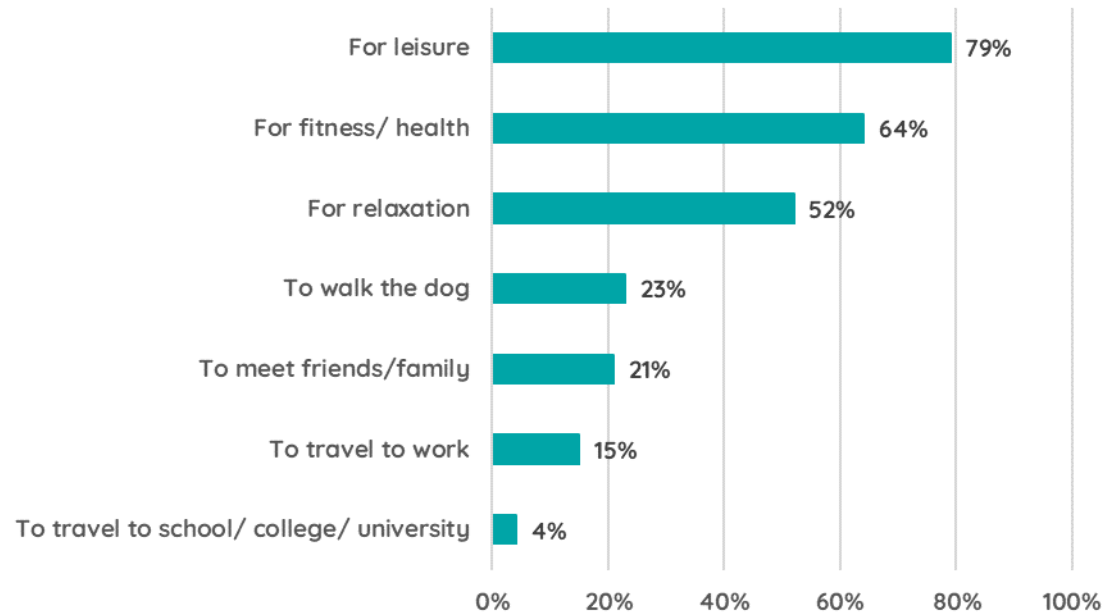
Frequency of Exeter Green Circle use



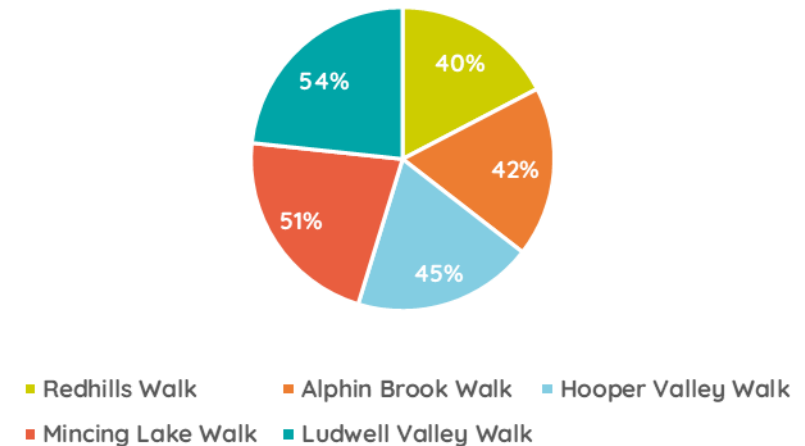
Why do you use the Exeter Green Circle?

- Respondents were asked why they use the Exeter Green Circle, and results show the reasons are more leisure-related. The most common purposes included for leisure (79%); for fitness/ health (64%); and relaxation (52%), which was similar to the results in 2020. 15% reported using it for travel to work (98% of these respondents were 'active' or 'fairly active'), and just 4% reported using it to travel to an educational setting.
- Those who reported using the Exeter Green Circle for active travel (travelling to work/ college/ school or to meet friends/ family) were asked which areas of the Exeter Green Circle they used for this activity. All areas were used by 40% or more of respondents, with Ludwell Valley Walk (54%) and Mincing Lake Walk (51%) being the most used areas for this purpose.

Reasons for using Exeter Green Circle

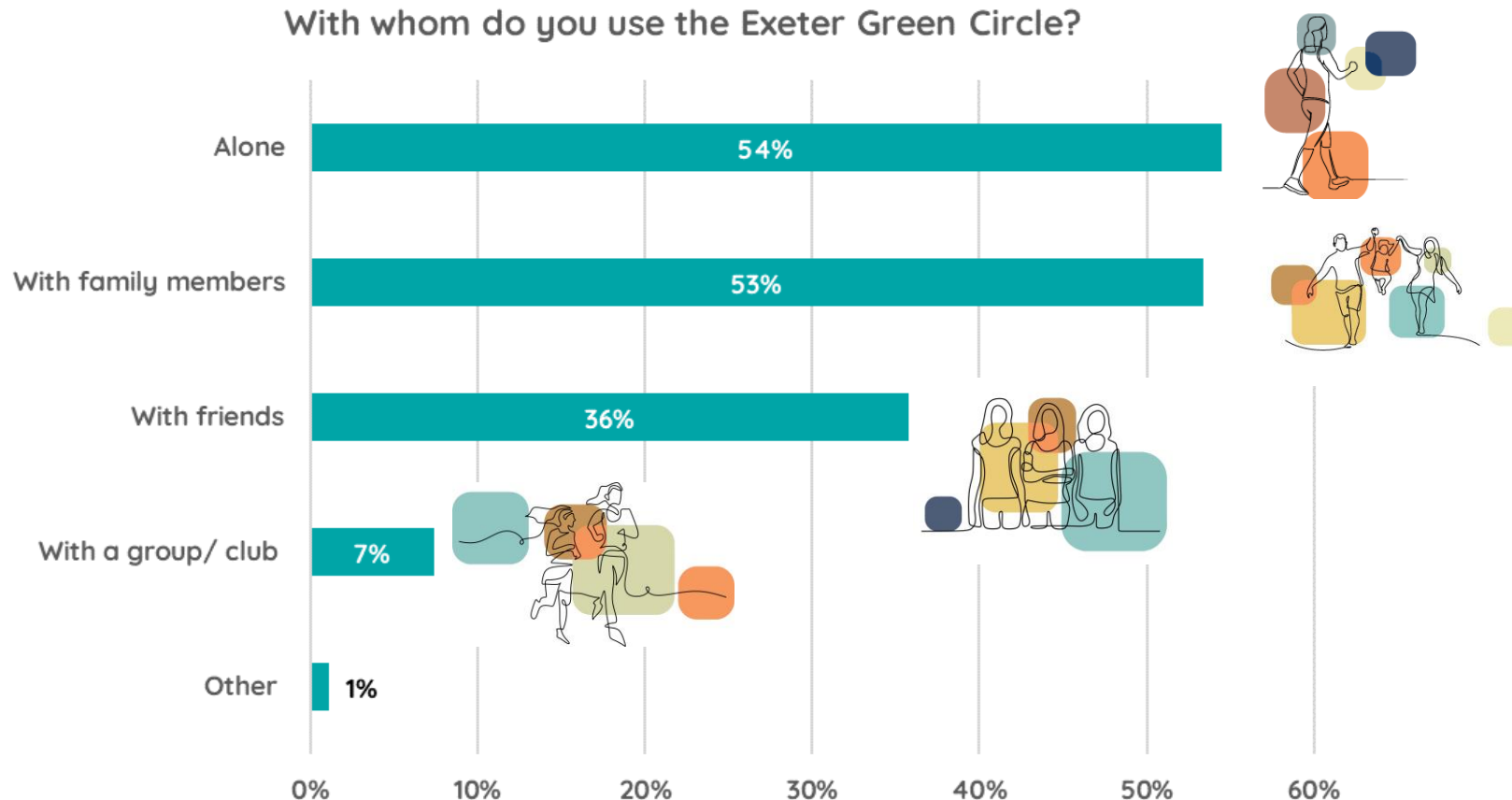


Areas of the Exeter Green Circle used for active travel



Alone or with others?

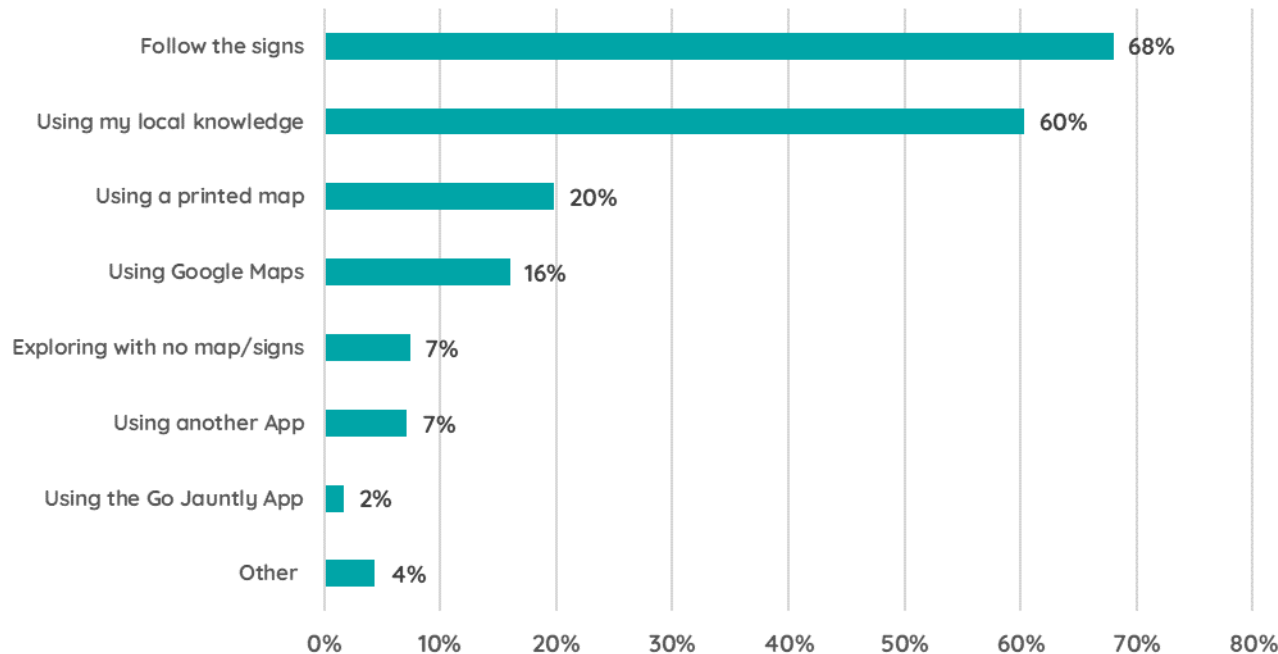
- Respondents were also asked with whom they typically use the Exeter Green Circle. Results show people are using the route both alone and with others. Over half reported using the Exeter Green Circle alone (54%) and over half with family members (53%), whilst 36% reported using it with friends.
- Just 7% reported using the route with a group/club. Groups included South West Road Runners, the U3A, Ramblers, Running Club and Scouts.



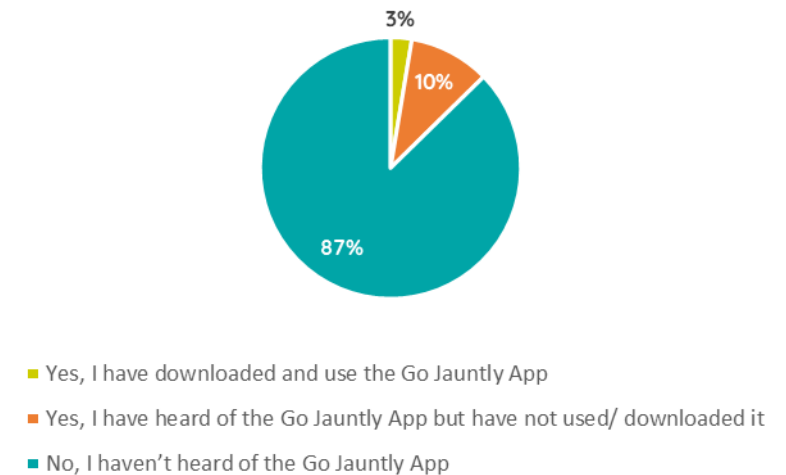
Navigating the Exeter Green Circle

- Respondents were asked to select the various methods they preferred to navigate the Exeter Green Circle. The following methods were selected: the use the signs (68%); using local knowledge (60%); using a printed map (20%), Google Maps (16%); using another App, including OS maps, Strava, and Garmin (7%); and exploring with no means of guidance (7%). The majority of those selecting 'other' stated using the ECC online map. Just 2% selected using the Go Jauntly App.
- Respondents were asked whether they had heard of, or used, the Go Jauntly App to help navigate, learn about and explore the Exeter Green Circle. Just 13% had heard of the Go Jauntly App, with only 3% using it. The remaining 87% had not heard of the Go Jauntly App.

Preferred means to navigate the Exeter Green Circle

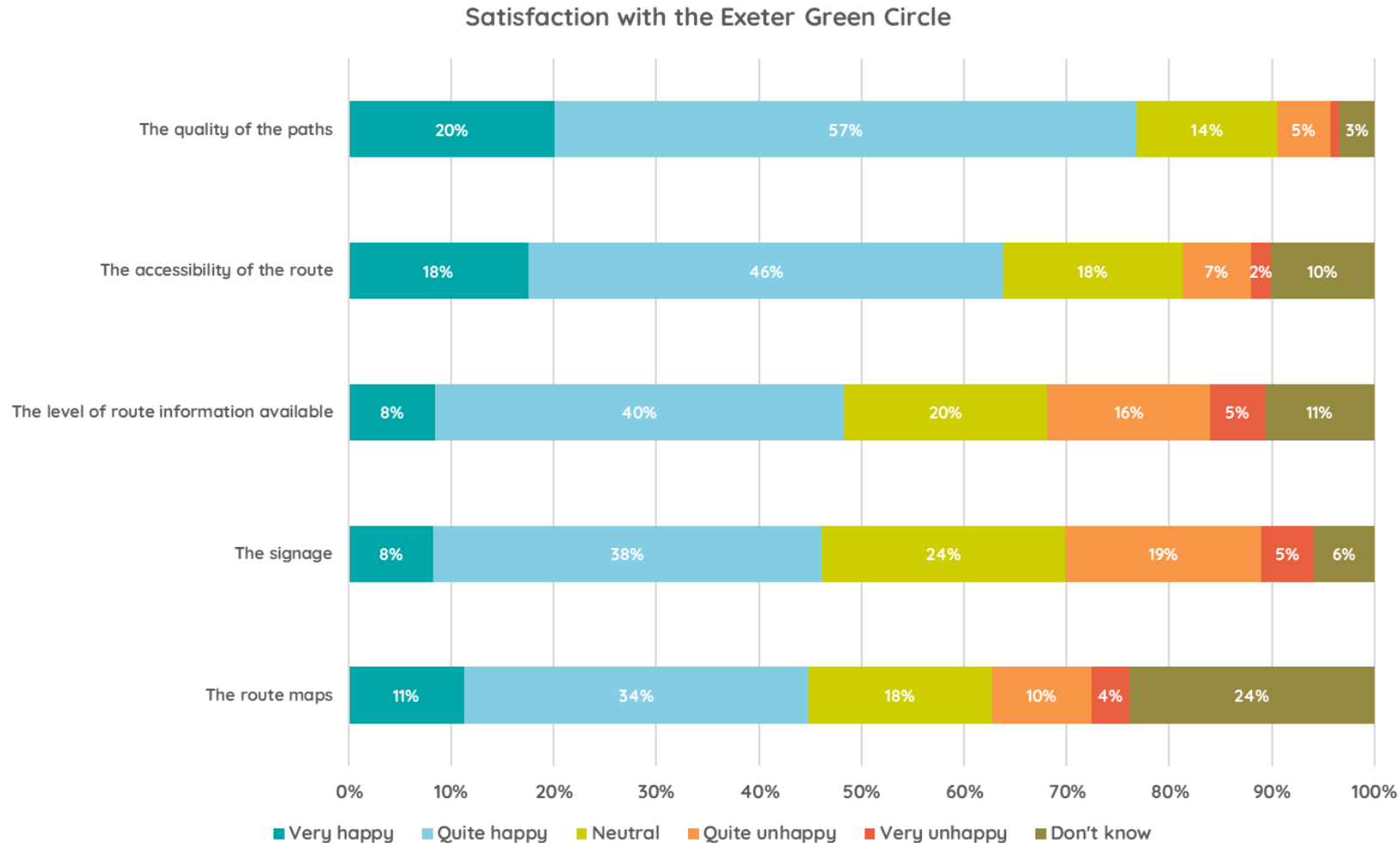


Knowledge and use of the Go Jauntly App



Satisfaction with the Exeter Green Circle

- Respondents were asked to rate how they felt about different aspects of the Exeter Green Circle offering. Respondents were most positive about the quality of the paths, with 77% stating that they were happy with this aspect, followed by the accessibility of the route (64%). The greatest areas of dissatisfaction were in relation to signage (24% unhappy), and the level of route information available (21% unhappy). Nearly a quarter (24%) were unsure about the route maps; this could be because they did not use them.



Signage

Respondents who indicated that they were dissatisfied or neutral with the different aspects of the Exeter Green Circle were asked to provide further details regarding their response, including the location of any issues.

Signage

- The most commonly cited reasons for dissatisfaction with the signage included visibility issues; signs were difficult to see or hard to find (100 respondents); there was a lack of or missing signage along the route (65); the signs were confusing or unclear (64); and signs were not maintained, or they were vandalised (30).
- Many respondents mentioned fears and actual incidents of getting lost on the route as they felt that the signs were often too small to see, faded, or simply missing. This has dissuaded some from attempting the route again due to the difficulty in navigating where to go without clear and frequent signage.

“Signs can be discreet to the point of invisibility, especially in summer when they can be overgrown. Also, the direction can be a bit ambiguous.”

“It’s not always easy to spot the Green Circle stickers and they are not always overly clear in what direction they are pointing.”

“In some places signs are missing meaning you have to make educated guesses on where to go!”

Where respondents cited locations of issues with signage, the most frequently cited were: Redhills, Exwick, and the University and Pennsylvania area.



Level of route information available

Level of route information available

- The most commonly cited reasons for dissatisfaction with the level of route information available included a perceived lack of advertisement and promotion of the Exeter Green Circle route (76 respondents); a lack of route information that is readily available or easy to find (online or physical) (35); a lack of information on the route including physical information boards and signs (32); and that information available is confusing or unclear (25).
- Several respondents indicated that they had only stumbled across the route by accident or had heard about it through word of mouth.

“I just think some more prominent information regarding the route, perhaps at different junctures along the route, would not only help people navigate/find their way, but would also help promote the route to those who don’t know about it.”

“It’s such a great local thing but surprising how long it took me to discover it and how few people know about it!”

“I had never heard of it until someone told me last year. Then I started spotting the odd sign. Trying to look it up I found there was only one very small illegible map available online making it impossible to understand where the route actually went.”

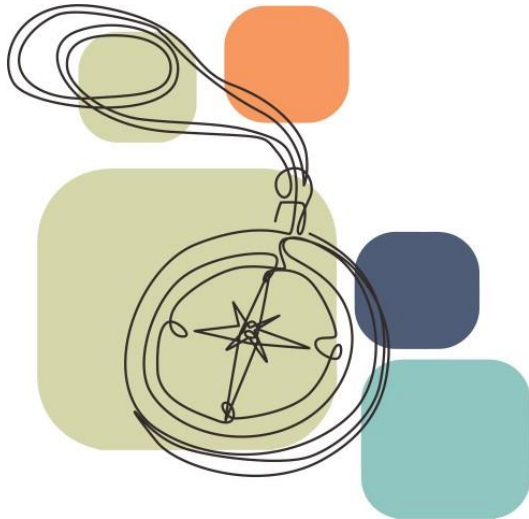
No locations were cited as particularly problematic; however, many respondents felt the information should be easy to find regardless of location.



Route Maps

Route Maps

- The most commonly cited reasons for dissatisfaction with route maps were that they were not detailed enough (51 respondents); maps were not easily accessible (online/offline/printed) (23); and that the maps were difficult to interpret (20). Several respondents (24) also said they had never come across route maps before.
- The map available online was cited as too basic and confusing to follow, and similarly to route information, some respondents suggested that physical boards along the route would help users understand where they were and where they had to go next. Whilst there is a route map available on the app 'Go Jauntly', respondents were reluctant to download another app on their smartphones and were frustrated that it couldn't be followed on more widely-used apps such as Google Maps.



“I have often searched for good maps/explanations of how to use the Green Circle and not found them. Linking with google maps for example would really help me.”

“Route maps could be placed at a few locations on the route to assist next to signage.”

“There doesn't seem to be the complete map online. The only option seems to be to download the Go Jauntly app.”

Respondents mentioned issues particularly in Alphington, Ludwell, and Redhills areas.

Accessibility

Accessibility

- The most commonly cited reasons for dissatisfaction with accessibility included the uneven or boggy terrain (26 respondents); lack of accessible areas for mobility scooters, wheelchairs, and pushchairs (19); obstacles such as gates and steps (10); and inaccessibility for cyclists (7).
- Respondents recognised that not all areas of the Exeter Green Circle route can be made fully accessible, however felt that more work could be done to ensure at least some of the route is accessible to those with limited mobility. In particular, parents with pushchairs found that it was not possible to utilise the route due to muddy and slippery conditions, and felt this impacted their ability to go out as a family.

“Steep slopes are unavoidable and the valleys and climbs are part of the walk’s attraction. However, they need to be in a good enough condition that older walkers don’t feel in danger of slipping.”

“Accessibility is increasingly linked to ability of those with disabilities to use route. Many parts feel more like a hiking route (muddy fields, kissing gates, dodgy wooden steps). Needs more input from appropriate groups, and decision made on how “accessible” you want the route to be.”

“The paths aren’t very inclusive for pram or wheelchair users.”



Only a small number of respondents cited particular locations where accessibility was an issue, and these were spread across several areas of the route, including: Alphin Brook, Mincinglake, Ludwell Valley, Redhills, and Pennsylvania.

Quality of Paths

Quality of paths

- The most commonly cited reasons for dissatisfaction with the quality of the paths were terrain (51 respondents), with 36 respondents citing muddiness as a particular issue; paths becoming more difficult in bad weather (21); problems with accessibility (17); and issues regarding maintenance (15).
- While many respondents understood that winter/wet weather might be responsible for poor quality paths, some felt this would be less of an issue if paths were regularly maintained to combat flooding and muddiness in some areas.

“The original conception of the path was great but poor maintenance has spoilt it for me.”

“Routes can be impassable after rainfall so this will affect my decision to use the trail.”

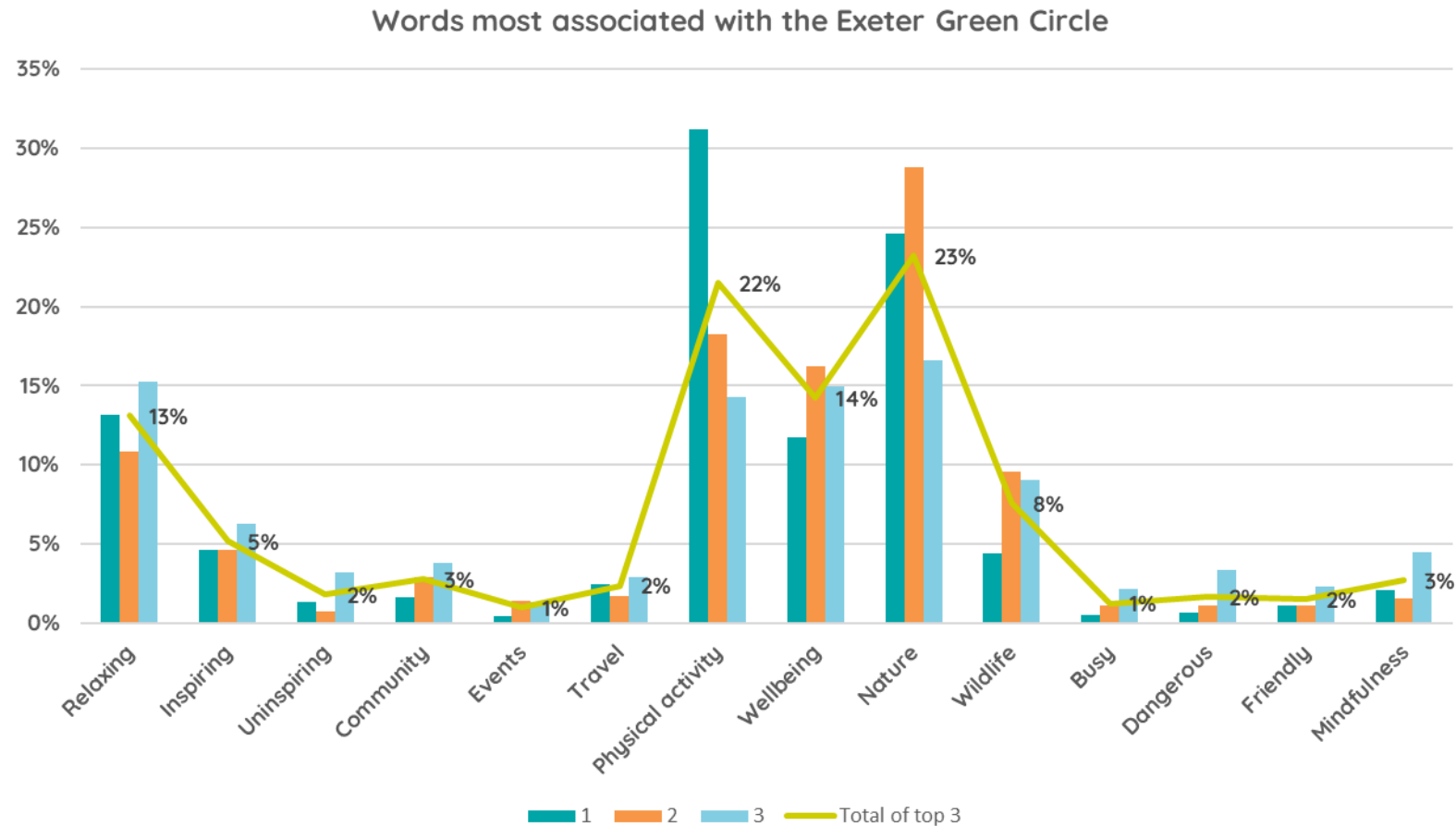
“Can be extremely slippery at Barley/Redhills area. I know several people who will not go there on their own after having a slip and hurting themselves.”

Areas around the Barley Valley Country Park (Redhills, Barley Lane, and Exwick Cemetery) were mentioned by respondents as having particularly muddy, waterlogged, and overgrown paths. The Alphington area and Mincinglake were also mentioned as being affected by bad weather with paths often becoming slippery and sometimes impassable due to poor water drainage.



Words most associated with the Exeter Green Circle

- Respondents were asked to identify which words, from a given list, they would most associate with the Exeter Green Circle. Respondents ranked their top three answers.
- Overall, 'nature' was the word most ranked in the top 3, with 23% selecting it, followed by 'physical activity' (22%) and 'wellbeing' (14%). 'Physical activity' was the word most selected in the top spot, with 31% ranking as number 1.



Suggested improvements: Signage

Respondents were asked what improvements they would like to see made to the Exeter Green Circle. The most commonly cited suggestions were similar to those made in the 2020 survey.

Echoing the area of greatest dissatisfaction, the most frequently suggested improvement was improved signage around the Exeter Green Circle route, with many stating that signage is unclear or that signage is too small or there are an insufficient numbers of signs, making it difficult to follow the route and easy to get lost. Areas most frequently mentioned as needing improved signage were around the University, Redhills Walk, Exwick and Pennsylvania.

“Better signage around the University section, I missed signs there and went off-piste”.

“The signage could be improved in places as some small signs have been covered by foliage.”

“Mostly I think it just needs the signage ironing out at one or two places where you can lose the route. It is tricky where busy roads have to be crossed”.

“More distinctive and identifiable signage. Maybe something like the new signage around the lower Otter Valley?”



Suggested improvements: Maintenance

A large number of respondents would like to see improvements made to the paths, including in areas that can get muddy or flooded during bad weather. Other suggested maintenance improvements to make paths more accessible (e.g. handrails or hard standing surface), and more waste/dog waste bins in order to preserve the quality. Areas most commonly cited as needing improved maintenance included Mincinglake, Exwick Cemetery, and Barley Valley Nature Reserve.

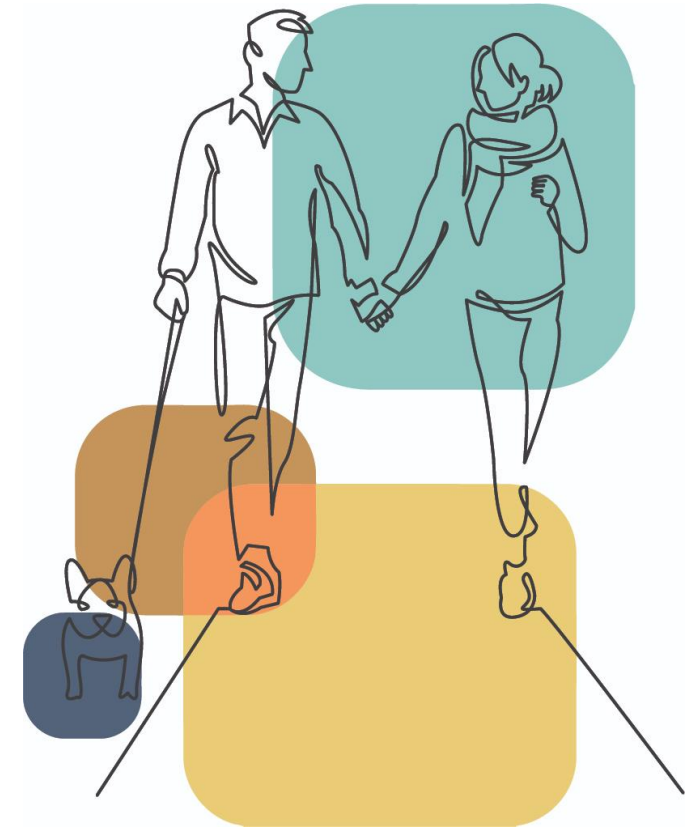
“Sometimes the area up behind Exwick Cemetery gets super muddy and a bit dangerous, so perhaps some handrails”.

“Barley Valley Nature reserve is a popular area for dog walking but very quickly becomes muddy and boggy given the volume of use”.

“The main path through Mincinglake valley park gets very muddy in the winter so it can become impassable without wellies”.

“More hardstanding paths or gravelling and widening of paths”.

“Waste bins have been removed from important locations along the route which has led to more fly tipping of filled dog waste bags and a build up of waste along routes”.



Suggested improvements: Promotion/ communication

A number of respondents felt that there needs to be more promotion and communication of the route to raise awareness of it within the City, with many respondents feeling that it is not well known. Ideas for promoting the route included advertising it around city centre/residential areas and both online and print promotion including maps and route information.



“More information and detailed maps to be passed to the Exeter residents to inform them of the Circle and more publicity in general of the Green Circle.”

“More publicity about it and more signage leading towards it from key routes to increase awareness.”

“More awareness of it - perhaps more full maps on parts of the Green Circle to help advertise the rest of it beside the part which the person is using?”

Suggested improvements: Information

A number of respondents wanted more information about the Exeter Green Circle to be readily available, including route information such as maps, locations of accessible areas/facilities/car parking, and information regarding history/landmarks/nature/wildlife. Some felt information could be displayed on information boards.

“More frequent large route maps and info boards”.

*“Would like to know which routes would be accessible for prams.
Would also like clear information about parking facilities”.*

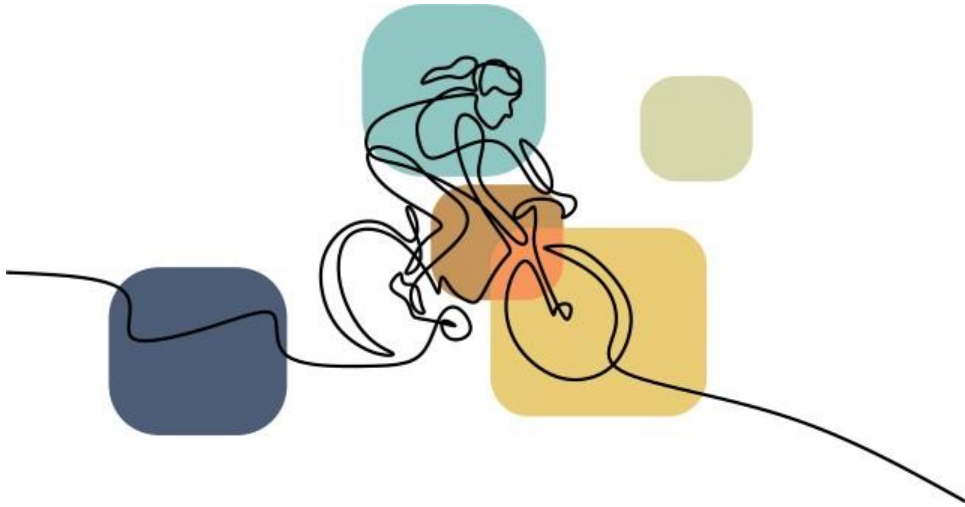
*“Further information boards on the route about local history
would be great”.*

*“Maybe some information boards at appropriate places along the
way would also help - eg. info about wildlife that you might expect
to see or historical information”.*



Suggested improvements: Accessibility

Another area for improvement related to accessibility of the route. Suggestions for improved accessibility included making the routes accessible for all, including wheelchair users, mobility scooters, pushchairs and cyclists. Some suggested resurfacing sections of the route that are uneven or prone to flooding or getting muddy, whilst others felt steep sections of the route can be dangerous and needed improvements.



“Some parts of the route can be treacherous with slippery surfaces and narrow trails. Bike access would be welcome too.”

“Please adapt where possible for better access for cycles, wheelchair users and disabled/family cyclists.”

“Better pathways so everyone can enjoy them. I’d love to take my young baby (in a pram) and toddler (using his scooter) along some of the route, but this just isn’t possible which is a great shame.”

“There could be alternative sections for the steep sections.”

“Any rough terrain to be improved to make it more accessible for both cyclists and pedestrians.”

Other suggested improvements: Safer crossings

Another area of improvement suggested by respondents related to making areas of the route safer at road crossing areas. Comments around dangerous road crossings were largely related to the Alphington area and the A30 roundabout, and some comments to Mincinglake/ Pennsylvania.

“It is tricky where busy roads have to be crossed. For example, at the big Alphington/A30 roundabout, it needs to be made clearer that pedestrians have priority.”

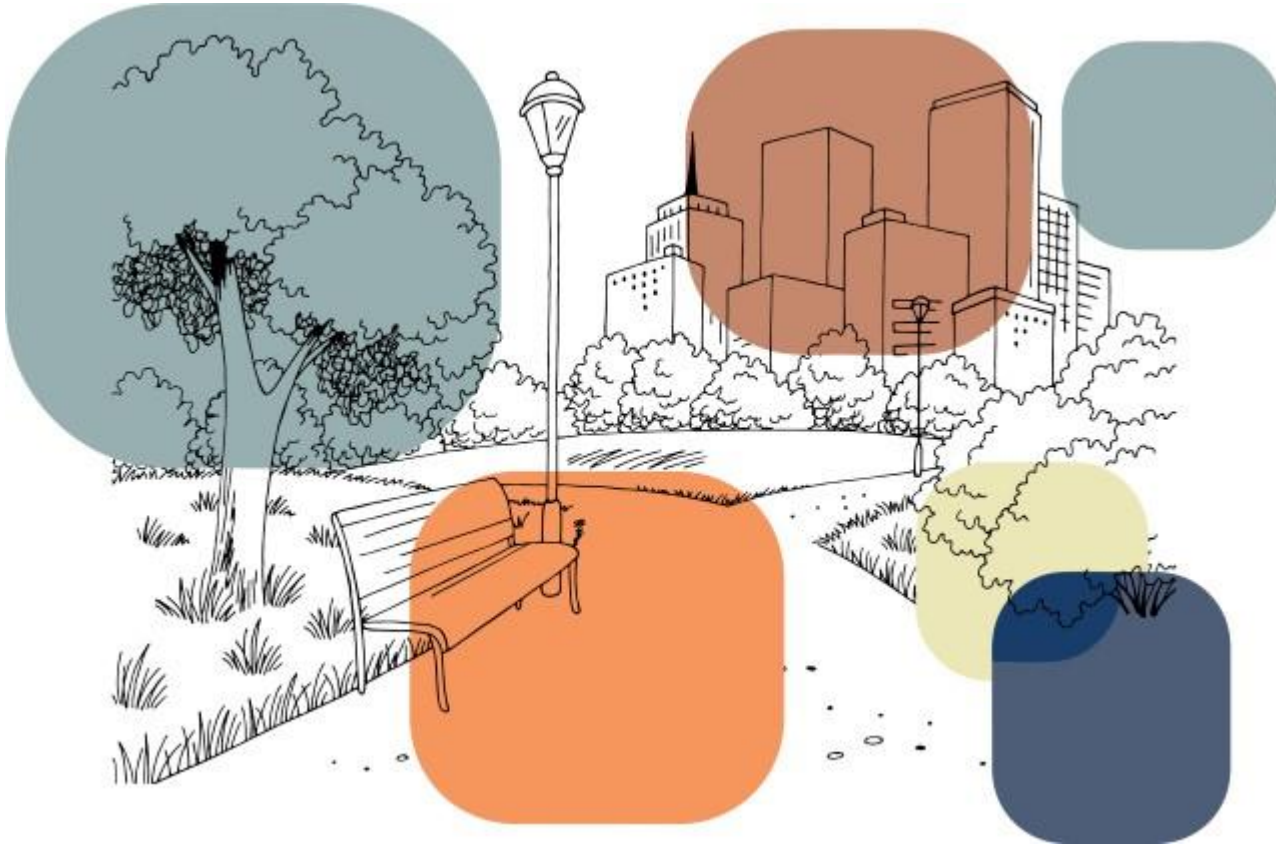
“I’m not a fan of the crossing of the road from the A30 to Alphington, it’s a bit scary. I think drivers are just not expecting to see people on foot around there.”

“End of Mincinglake park toward Pennsylvania, a safe pedestrian crossing is needed.”



Suggested improvements: Additional routes

Some respondents felt that the Exeter Green Circle could be improved by creating additional walking routes. This included creating smaller walking routes within the existing route and expanding the Exeter Green Circle further to correspond to the expansion of the City. Suggested areas expansion and additional routes included Ludwell Valley Park, Mincinglake, Pinhoe and Beacon Heath.



“Perhaps some optional add on loops going through the valley parks? Such as Mincinglake and Ludwell where it just skims the edge.”

“It would be good to have some alternative circular diversions in the different sections of the walk so people can do a walk locally - and not just a ‘there and back’ walk.”

“With the expanding size of Exeter, I wonder if there is scope to widen the route somehow...”

“Increased to cover more of Exeter as the city grows. Pinhoe?”

Suggested improvements

Facilities

Some respondents indicated that additional facilities along the route or information about facilities that are already there would be beneficial. These included places to sit e.g. benches; toilets; and places to access refreshments, including water points and café stops.

“There needs to be guidance given re local loos, food and drink, especially when walking the whole loop”.

“Perhaps linking with local businesses to put in signage for the closest refreshment stop”.

“Cafes and toilets marked on map”.

“I’d like to see more benches or places to sit and admire the views on the way round”.



Protection of nature

Others wanted to see the natural surroundings of the Exeter Green Circle, including wildlife, protected. Some felt conservation areas and rewilded sections would enhance the route.

“Please protect the green circle and make sure these natural spaces remain available for future generations”.

“Rewilded sections showing nature regeneration and signage about this”.



Non-users of the Exeter Green Circle

- Just 5% of the sample indicated that they did not use the Exeter Green Circle. Nearly all were open to trying it out, with 58% stating they would consider using the Exeter Green Circle in the future, and 35% reporting they might consider it. Just one respondent stated that they would not use it in the future, whilst 2 were unsure.
- Reasons for being open to try the Exeter Green Circle, included a love of walking; wanting to try new routes; a love of nature and green space; it is local and accessible without getting in the car; and interest in exploring more areas in Exeter.

“I love exercise whether it's walking, cycling or running, so any route that would encourage me to get out of my house locally, without having to use the car, is exciting.”

“To explore more of Exeter's surroundings.”

“Recently had our first child so always looking for new places to take him for a walk.”

- Encouragement factors for non-users included more information available/ improved advertising of the routes; improved/ clear signage; parking along the route; safe routes; facilities along the route; cycle path; accommodating pushchairs/ wheelchair users; and accessible via public transport.

“Better signage to know where to go. Feeling safe as I am a lone walker sometimes.”

“Easy access along the whole route, with free parking to allow for short sections to be completed.”

Recommendations

The survey reached a large number of users (and some non-users) of the Exeter Green Circle and yielded a good response. Nonetheless, caution should be taken when drawing conclusions from responses of a self-selecting sample. Keeping this in mind and taking the data at face value, the following recommendations have been drawn from the findings:

- **Signage:** signage generated the highest levels of dissatisfaction and suggestions for improvement (as it did in the 2020 survey). Following the signs was also the most preferred method of navigating the route. Although there has been recent work to improve the quantity of signage, further improvement could be made in terms of visibility, particularly at junctions and in certain areas, notably the University, Redhills Walk, Exwick and Pennsylvania.
- **Accessibility:** alongside general maintenance, the survey found that respondents would like the route to be more accessible to different groups, including wheelchair, mobility-scooter, pushchair users, and cyclists. Although recognised that the whole route could not be made accessible to these groups and the need to preserve the 'natural state' of the route, some felt that certain areas could be improved for such use, or perhaps those areas that are already suitable could be promoted more as 'accessible areas'?
- **Promotion/ communication:** although it was an engaged sample (the majority of respondents used the Exeter Green Circle), a large number of respondents felt that promotion around the route, including printed and online information and route maps, and general advertisement, could be improved. Reaching those that are less active/ inactive could also be part of future communication drives around the Exeter Green Circle, potentially through networks or the CPAOs and Community Connectors.
- **Engage groups or clubs with the space:** as with the 2020 survey, only a small proportion of respondents used the Exeter Green Circle with a group or club (7%), indicating a potential opportunity to engage with existing clubs or groups within the Live and Move network.
- **Encourage active travel use:** using the route for active travel, such as travelling to work, or an educational setting was less common (15% and 4% respectively); could use of the route be encouraged for such activities?
- **Means of navigating the route:** only a minority (3%) of respondents had downloaded the Go Jauntly App, and 87% had never heard of it. App use also came low down on preferred methods of navigation, with a printed map (20%) being preferred over Google Maps (16%) or another App (7%). Consideration should be given to these findings when looking at promoting or developing future means of navigation.