

Using evidence to shape better services



Brecon Beacons National Park Authority

Residents Survey

August 2013

REPORT

Wastes &
resources
management



Community
safety &
neighbourhood
policing



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Healthy
communities

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Active citizens
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Local
Authority
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Project details

Title	Brecon Beacons Residents' Survey
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1. Executive summary

Brecon Beacons National Park and its heritage

- ◆ The majority of residents cite a better environment, green space, fresh air, etc (63%) and a better quality of life (52%) as the main reasons why they live within the Brecon Beacons National Park area.
- ◆ Looking after and promoting the historic environment and cultural heritage of the National Park is seen as important to 95% of all residents; it is seen as very important by 74% and fairly important by 21%.
- ◆ The most important aspects for residents in looking after and promoting the National Park's historic and cultural heritage is more interpretation and better access to information and more advice on maintenance and conservation of the historic environment.

Leisure and Tourism in the Brecon Beacons National Park

- ◆ The most popular leisure activity undertaken by residents is enjoying nature and wildlife; 88% of residents indicate they participate in this activity. Almost eight in ten (79%) also enjoy walking for pleasure, while six in ten (60%) enjoy sightseeing and visiting places of special interest. Visiting food festivals and farmers markets is enjoyed by almost six in ten (57%), while attending festivals and special events appeals to just under one-half (46%) of residents.
- ◆ Around six in ten (59%) residents participate in walks in the lowland areas of the National Park at least once a fortnight. Just over one-quarter (27%) participate in hill walking at least fortnightly while just over one-fifth (22%) undertake an activity with children at least once a month in the National Park area.
- ◆ Participation in leisure cycling is a relatively popular activity with around one-fifth (22%) doing this at least once per month. Mountain biking and horse riding are also relatively popular activities, although they are undertaken far less frequently by most residents. Perhaps not surprisingly, it is younger residents and those with children within their households that participate most frequently.
- ◆ Looking at tourism in the National Park, 93% of residents would agree, either strongly or slightly, with the statement that 'visitors help keep our shops and pubs open, bringing economic benefit to the National Park area'. A similar proportion (92%) agree that 'tourism should be actively encouraged and promoted', while 90% agree that 'we welcome visitors into our local community'.
- ◆ While proportionally more residents would disagree, either strongly or slightly (42%) that 'tourism brings unnecessary traffic congestion and parking issues', 39% agree with this statement. The vast majority of residents disagree (68%) with the statement that 'tourists are ruining the Park area', however 13% agree.

The local area

- ◆ Just over three-quarters (76%) of residents say they feel strongly that they belong to their local community; 35% feel very strongly and 41% feel fairly strongly about this. Feelings of belonging to the local community are highest for those that have lived in their area the longest and for those aged 65 and over.

- ◆ When asked about the extent to which they agree with five statements regarding their local community and how it has changed in the last 10 years, almost eight in ten residents (79%) agree (either strongly or slightly) that 'local people still know and look out for each other. Just over one-half (52%) agree that 'there are fewer public services, making it more difficult to live here', while just under one-half (46%) of residents agree that there is 'more going on now that is organized by local people'.
- ◆ 37% agree that 'new people moving into the area bring new ideas that make the community better'. A similar proportion (35%) indicated they neither agree nor disagree. Looking at the statement 'new people moving into the area make changes that people don't like', then agreement is 34% compared to 26% that disagree.
- ◆ Some six in ten (63%) residents have indicated they have given unpaid help as an individual or to a group, club or organisation (excluding help given to family members) within the last 12 months. Almost one-quarter (23%) indicate they do this on a weekly basis. While 18% provide unpaid help at least once a month. Just over one-fifth (22%) indicate they have given unpaid help in looking after the Brecon Beacons National Park area or in helping other people to enjoy it.
- ◆ Just over one-quarter (26%) of residents indicate they regularly produce and grow their own food all year round. A further 34% indicate they occasionally do this. Around one-fifth suggest they would like to produce and grow their own food but either lack the time or the space to do so, while one in ten indicate they lack the know how; typically this is younger residents aged 34 and under.
- ◆ Some two-thirds (67%) of residents would be prompted to buy more local produce if there were a local food outlet nearby. Just over one-half (51%) would be prompted if they had access to a directory of local producers, while around one-fifth (22%) would utilise a home delivery service if it were available.

Information and communication

- ◆ Some six in ten residents (63%) indicate they find out about the work of the National Park Authority via their local newspaper. Just under one-half (49%) find out through word of mouth from family and friends, while 40% have found information on the National Park website and 39% from a National Park Visitor and Information Centre. Just over one-quarter (27%) have gained information from a Visitor Guide or leaflet.
- ◆ Asked about their interest in the work of the National Park Authority, three in ten residents (30%) indicate they are very interested and a further five in ten (50%) indicate they are fairly interested. Just under two-fifths (37%) of residents have had contact with a National Park Authority representative within the past three years.
- ◆ Overall, nine in ten (91%) residents indicated some interest in being consulted by the National Park Authority. Almost one-half (49%) of residents indicate that a direct mailing (through the post) would be their preferred consultation media, while just almost two-fifths (39%) of residents indicating email/internet surveys. Three in ten (30%) would prefer consultation via the local press.
- ◆ The majority of residents (96%) indicate some form of internet connection at their home; 78% identify their connection type as broadband via a telephone line, while 16% use mobile broadband and 4% have some other form of internet connection.

- ◆ Looking to residents' views on their broadband, 55% rate the reliability as very or fairly good, although 22% rate it as fairly or very poor. Just under one-half (46%) indicate the range of broadband service providers as good, while 22% say it is poor. In terms of broadband speed, 42% indicate it is very or fairly good, while 36% indicate it is fairly or very poor.

The National Park Authority

- ◆ Overall, 51% of residents agree, either strongly or slightly, that the National Park Authority is often 'out of touch' with local people. Just 10% disagree with this statement. Just under one-half of residents (49%) agree that 'If I wish to find out what the National Park Authority does, they provide a range of ways and information I can access'.
- ◆ One-third of residents agree that local news reports accurately reflect the work of the NPA; 5% agree strongly and 28% agree slightly. Just under one-fifth (19%) agree that 'the National Park Authority listens to and responds to residents' opinions'; 31% disagree, while 32% neither agree nor disagree.
- ◆ When asked the importance of a range of ten activities undertaken by the National Park Authority, all are seen to be very or fairly important to 82% or more residents. The most important activity is the conservation of the landscape and looking after the countryside; 85% of residents rate this as very important with a further 13% indicating it is fairly important.
- ◆ Overall, wildlife conservation is seen as important (either very or fairly) by 97% of residents. 97% indicate that looking after footpaths and access is important while 96% say the same for conservation of historic sites. Two-thirds (66%) feel it is very important to work closely with residents and communities, with a further 29% indicating this is fairly important.
- ◆ While 98% of residents indicate that they feel it is very or fairly important for the National Park Authority to focus on conservation of the landscape and looking after the countryside, 80% indicate they are satisfied with how the Authority is doing this. Three-quarters of residents are satisfied, either very or fairly, with how the Authority is looking after footpaths and access, while 74% are satisfied with conservation of historic sites, 73% are satisfied with wildlife conservation and 71% are satisfied with the way the Authority helps people and visitors to enjoy the area.
- ◆ The area with lowest satisfaction is working closely with residents and communities; just 41% are satisfied, either very or fairly, with this aspect of the Authority's work compared to 33% that suggest they are dissatisfied.

Planning and development control

- ◆ Some two-fifths of residents (42%) have previously applied for planning permission and/or commented on a planning application (40%). Proportionally more residents aged 45 and over and those that have lived in the area for 11 or more years have made or commented on a planning application, compared to others.
- ◆ Nine in ten residents (90%) agree that planning decisions can help protect the special qualities of the National Park area, while just four in ten (40%) agree that the National Park Authority takes into account community views when setting policy and when making planning decisions (40%).

- ◆ Asked to rate the importance of seven aspects of the National Park Authority's planning and development control activities, between 83% and 96% of residents indicate each are 'very' or 'fairly' important. The most important are the provision of information on planning applications, protecting the Park from inappropriate development and making planning decisions in a timely manner, all at 96%.
- ◆ While they are high levels of importance for each of the activities, levels of satisfaction are relatively low. The highest level of satisfaction, with 60% of residents indicating they are very or fairly satisfied, is in protecting the park from inappropriate development. Satisfaction levels then fall to 47% for the provision of information on planning applications and for delivering local planning guidance, to 40% for providing education and learning opportunities, and to 38% for making planning decisions in a timely manner.

Heating, water and energy in the home

- ◆ The vast majority (99%) of homes have a central heating system of sorts; 49% have mains gas central heating, while 33% are oil based and 18% solid fuel. One in ten have electric central heating and 6% have LPG.
- ◆ Some nine in ten homes (89%) are on a mains water supply; 44% are metered while 45% are unmetered. Almost three-quarters (74%) are connected to the mains sewage system, while 25% have a septic tank.
- ◆ Looking at water conservation, 48% of homes are using rain water butts. 6% are using grey water to conserve and recycle water.
- ◆ The most common energy saving measures utilised by residents is the insulation of their property and the use of energy efficient lighting and bulbs; almost nine in ten (86%) indicate they do both of these. 50% have lowered heating and/or water temperatures, while 42% have installed an energy efficient boiler and 41% have installed energy efficient thermostats.

Future concerns

- ◆ Given a list of potential concerns, the greatest concern for residents in the coming three to five years is the cost of energy and fuel; almost four-fifths (79%) of residents indicate these two issues as their greatest issue. Around one-half of residents also indicate the connectivity of public transport, access to high speed broadband and services for older people as being concerns in the next three to five years.
- ◆ Looking further ahead than five years, it is access to services for older people that comes top of the list; 59% indicate this, rising to 68% for those aged 55 to 64.

2. Introduction

Background to the study

National Parks were designated under the 1949 National Parks and Access to the Countryside Act, but their current framework is the Environment Act 1995. Section 61 of this act which sets out the Parks' two purposes:

- Conservation and enhancement: *"to conserve and enhance the natural beauty, wildlife and cultural heritage of the National Parks."*
- Understanding and enjoyment: *"to promote opportunities for the understanding and enjoyment of the special qualities (of the Parks) by the public."*

The two purposes of the National Parks are underpinned by the Sandford Principle which states that enjoyment of the National Parks *"shall be in a manner and by such means as will leave their natural beauty unimpaired for the enjoyment of this and future generations."* It asserts the primacy of the first purpose over the second in cases of irreconcilable conflict. In many cases the two purposes are mutually supportive and share equal importance. In cases with more intractable conflicts the best balance will need to be found.

The vision of the National Park Authority (NPA) is that the Park's landscape is managed sustainably with widespread appreciation of its special qualities and where local communities benefit from its designation. Its aim is to achieve widespread understanding and support for the National Park as a protected landscape, which will be recognised as a valued local, national and international asset.

The NPA and its partners have previously undertaken surveys that provide data on visitor attitudes and behaviour but little data exists on the resident population of the National Park area. Existing secondary data sets, such as the 2011 Census, unfortunately do not provide a robust picture due to the disparity/non-matching of geographical boundaries, although this is improving.



Brecon Beacons NPA therefore wished to commission a Residents' Survey at a time of increasing need for evidence based decision making; it is the first time the National Park Authority has undertaken such research.

This is a vitally important project for the NPA and the research needs to deliver data that is useful in terms of delivering the National Park Management Plan Priority Actions and Corporate Objectives, both by setting a

baseline and for future improvements. It also needs to support reporting on the state of the National Park area (both ecologically and the human dimension) and provide data by which the reliability of other surveys can be measured.

The objectives of the research were therefore to:

- ◆ conduct a survey into the characteristics, behaviours and attitudes of Brecon Beacons National Park Residents – a baseline of the people who live within the boundary of the National Park ;
- ◆ collect a data set that can be used to benchmark future surveys;
- ◆ collect data on the resident populations attitudes and feeling of community;
- ◆ collect a data set that can be used to validate and establish greater reliability of other data sets.

Methodology and sample

The National Park area covers a wide and diverse area of 1,347 square kilometres, with nine Unitary Authorities falling within the park boundary (though only seven typically have any resident population within the area). NPA officers spent significant time considering the best methodology to achieve the stated objectives. Local Authorities within the area and other National Park Authorities have previously attempted to gain participation from residents via online and telephone surveys. These have typically returned poor responses and low sample sizes.

Both online and telephone methodologies ideally require suitable databases that hold email addresses and telephone numbers in order to provide a suitable contact mechanism, something that is not currently available for the National Park area. Therefore, given that the Brecon Beacons NPA holds a postal database of some 15,000 households within the National Park area, a census approach was chosen with a postal methodology seen as the best option for reaching the majority of resident households.

The database held by the NPA is at household level in that it includes the postal address and postcode of properties within the area, yet excludes any personal contact information (i.e. it does not contain named contacts). The survey was therefore addressed to the 'Householder' with the introductory text forming the first page of an eight page questionnaire.

The survey was available in both English and Welsh via print and online. Any household member aged 16 and over were invited to complete the survey and return it using the Freepost envelope supplied. An online survey was also provided as an alternative completion method with the link to the survey advertised within the introductory text. This also provided a method for other members of the same household to participate if they wished to do so.

A prize draw to win an iPad mini was also provided for both postal and online returns to encourage participation, particularly from a younger profile of residents.

Following cleansing of the household database, 14,849 records were available for the survey. A pilot postal survey was distributed to roughly 5% of the sample, some 749 households, with 129 completed surveys returned providing a 17% response rate.

Those that did not return the pilot survey were included in the full mailing of 14,720. A reminder postcard, that included details of prize draw and the online survey link, was sent to those households that had not returned a survey after two weeks. Again, this included both English and Welsh languages.

The main fieldwork period and prize draw ran from 15th April 2013 to 20th May 2013 (though any returns received up to 31st May 2013 have been included in the analysis). In total, 3,206 responses are included in this report, representing a 21.6% response rate overall.

Reporting

The output from the survey is in the form of conventional cross-tabulations. These provide results for the total sample and various sub-groups of the resident profile (e.g. age, children within household, length of time lived in the area, etc).

Within the main body of the report, where figures are not shown in the charts, these are three per cent or less and where percentages do not sum to 100 per cent, this is due to computer rounding. The 'base' figure referred to in each chart and table is the total number of residents responding to the question.

Statistical reliability

By the very nature that surveys typically represent the views of a sample population, sampling error must be considered when evaluating the findings. This is measured by the confidence level and confidence interval of the data. Most commonly, market research studies require a 95 per cent confidence level, indicating that we can be 95 per cent confident that the answer has not been arrived at by chance.

The confidence interval shows the variation that may exist in the findings drawn from a sample. For example, this survey shows that 52 per cent of residents indicate that they chose to live within the Brecon Beacons Park area as it offers a better quality of life. However, due to intrinsic characteristics of sampling, this will be surrounded by a confidence interval, in this case ± 1.7 per cent. This indicates that the real figure (the 'true' figure if the whole population were surveyed) lies somewhere between 51.3 per cent and 53.7 per cent.

Confidence interval	Split of question (% answering)		
	10% or 90%	30% or 70%	50%
Size of sample			
3,206 residents	$\pm 1.0\%$	$\pm 1.6\%$	$\pm 1.7\%$

The table above gives the confidence intervals for findings that centre around 10 per cent or 90 per cent, 30 per cent or 70 per cent and 50 per cent given the total study sample size of 3,206 residents (assuming a 95 per cent confidence level using random sampling).

Statistical significance:

When comparing the results within a sub-group (e.g. comparing age groups), the differences in results are tested for statistical significance. This way we know whether the differences are 'real' or whether they could have occurred by chance. The test reflects the size of the samples, the percentage giving a certain answer and the degree of confidence chosen. Assuming a 95 per cent confidence level, the differences between the results of any two groups must be greater than the values given in the table below to be statistically significant.

Percentage difference required before the results may be considered statistically significant			
Size of sample	10% or 90%	30% or 70%	50%
100 vs. 100	±8.4%	±12.8%	±13.9%
250 vs. 250	±5.3	±8.1	±8.8
500 vs. 500	±3.8	±5.8	±6.2

For example, the table below shows how residents within two age bands (with roughly 500 residents in each age band) have answered question one; Why do you live within the Brecon Beacons National Park area?

It shows that the per cent difference between those saying they live in the area due to a 'feeling of local community' between the two age bands is ±4% (28% minus 32%). However, the required difference for this statistic to be 'significant' is ±6%.

Age group	16 to 44	45 to 54
Feeling of local community	28%	32%
Closer to family/friends	36%	29%
Base:	471	516

Looking at being 'closer to family and friends' then a significantly greater proportion of those in the age band 16 to 44 indicate this reason for living in the National Park area than those in the age band 45 to 54. The difference is ±7% (36% minus 29%).

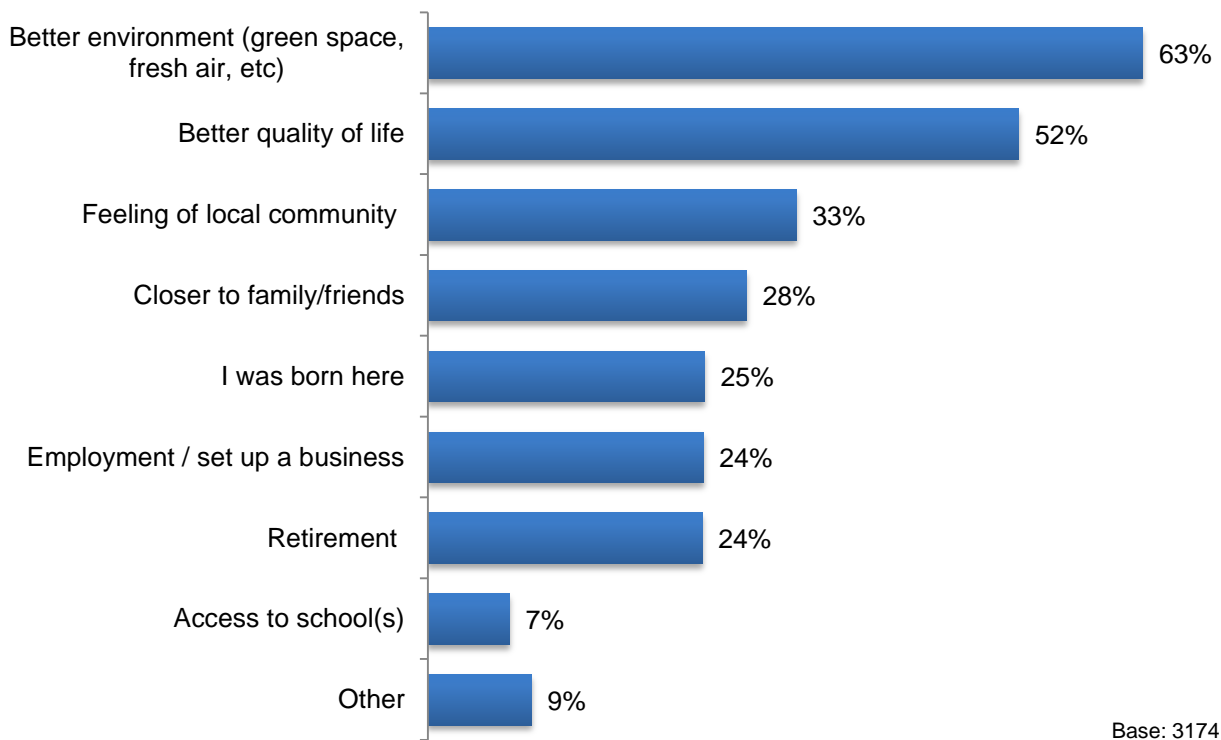
Where statistically significant differences exist, comparisons have been included within this report and/or highlighted in tables. Where shown in tables, statistically significant differences compare the highest figure (%) to the lowest figure (%) with the highest figure(s) shaded in green.

3. Brecon Beacons National Park and its heritage

Living in the National Park area

Residents were asked the reasons why they live in the Brecon Beacons National Park area. The majority cite a 'Better environment' and 'Better quality of life' as the two main reasons for living within the National Park area. One-third also suggest a 'Feeling of community' as a key reason for living in the area.

Figure 1: Reasons for living within the Brecon Beacons National Park area



There are a number of statistically significant differences in views depending on the profile of residents. For example, a greater proportion of those aged 65 and over cite 'Retirement' and 'Feeling of local community' compared to other residents, while a 'Better quality of life' sees more residents aged 64 and under indicating this as a reason for living in the area.

Figure 2: Reasons for living within the Brecon Beacons National Park area by age group

Age group	Better environment	Better quality of life	Feeling of local community	Closer to family/friends	I was born here	Employment / set up a business	Retirement	Access to school(s)	Base:
16 to 44	63%	55%	28%	36%	26%	34%	1%	15%	471
45 to 54	66%	55%	32%	29%	25%	30%	2%	14%	516
55 to 64	69%	57%	36%	24%	23%	27%	17%	4%	753
65+	60%	48%	34%	28%	24%	18%	48%	4%	1231

Statistically significant differences shown shaded in green (comparison of highest value (%) to lowest value)

Perhaps not surprisingly, a greater proportion of those aged 44 and under cite being 'Closer to family and friends', 'Employment/set up a business' and 'Access to schools' as reasons for living in the area.

Perhaps not surprisingly, a greater proportion of those households with children indicate being 'Closer to family and friends', 'Employment/start a business' and 'Access to schools' compared to those without children in their household, as highlighted in the table below. Proportionally more of those with three or more children in their household indicate that a 'Better environment' and 'Better quality of life' as a reason for living in the area compared to those with fewer children.

Figure 3: Reasons for living within the Brecon Beacons National Park area by number of children in household

Children in household	Better environment	Better quality of life	Feeling of local community	Closer to family/friends	I was born here	Employment / set up a business	Retirement	Access to school(s)	Base
None (inc. not specified)	63%	52%	32%	27%	24%	23%	29%	4%	2528
Children in household	65%	55%	34%	34%	26%	32%	5%	21%	646
One	62%	52%	33%	33%	29%	31%	5%	19%	274
Two	64%	54%	34%	38%	23%	33%	5%	22%	276
Three or more	75%	66%	36%	27%	23%	31%	3%	23%	96

Statistically significant differences shown shaded in green (comparison of highest value to lowest value)

Proportionally fewer of those that have lived in the area for 21 or more years indicate any of the reasons for living in the area with the exception of having been born in the area, compared to others.

Figure 4: Reasons for living within the Brecon Beacons National Park area by length of time living in area

Length of time lived in area	Better environment	Better quality of life	Feeling of local community	Closer to family/friends	I was born here	Employment / set up a business	Retirement	Access to school(s)	Base
Up to 5 years	76%	64%	34%	28%	6%	21%	27%	9%	495
6 to 10 years	77%	65%	37%	27%	6%	24%	28%	8%	425
11 to 20 years	76%	63%	36%	23%	6%	23%	30%	7%	571
21 years or more	52%	42%	30%	31%	41%	26%	21%	7%	1670

Statistically significant differences shown shaded in green (comparison of highest value to lowest value)

Describing the area in which residents live

Residents were asked to complete the following sentence:

"I like the area I live in because..."

Far and above the most commonly used adjective is beautiful, as shown in the word cloud below. Other key descriptors include community, friendly, countryside, scenery, quiet and peaceful.

"Beautiful countryside and a friendly community."

"Beautiful scenery & relaxed pace of life."

"Beautiful scenery, slower pace of life, peace and quiet"

"Country life suits my family & myself."

beautiful

The word cloud features 'beautiful' as the largest and most prominent word. Other significant words include 'countryside', 'scenery', 'good life', 'community', 'friendly', 'peaceful', 'quiet', 'nature', 'views', 'area', 'natural', 'home', 'rural', 'local', 'live', 'peace', 'place', 'family', 'people', 'space', 'unspoilt town', 'walk', 'landscape', 'pace', 'friendly', 'community', 'quiet', 'place', 'family', 'people', 'space', 'unspoilt town', 'walk', 'landscape', 'pace'. Smaller words include 'environment', 'sense', 'views', 'walks', 'feeling', 'open', 'hills', 'great', 'friends', 'wildlife', 'air', 'towns', 'village', 'traffic', 'safe', 'lovely', 'better', 'neighbours', 'nature', 'peace', 'lived', 'shops', 'nice', 'quality', 'access', 'walking', 'clean', 'Brecon', 'green', 'mountains', 'well', 'part', 'places', 'children', 'accessible', 'pace', 'family', 'living', 'peaceful', 'spaces', 'amenities', 'space', 'walk', 'unspoilt town', 'landscape', 'pace', 'friendly', 'community', 'quiet', 'place', 'family', 'people', 'space', 'unspoilt town', 'walk', 'landscape', 'pace'.

"I feel at home and have everything I could wish for."

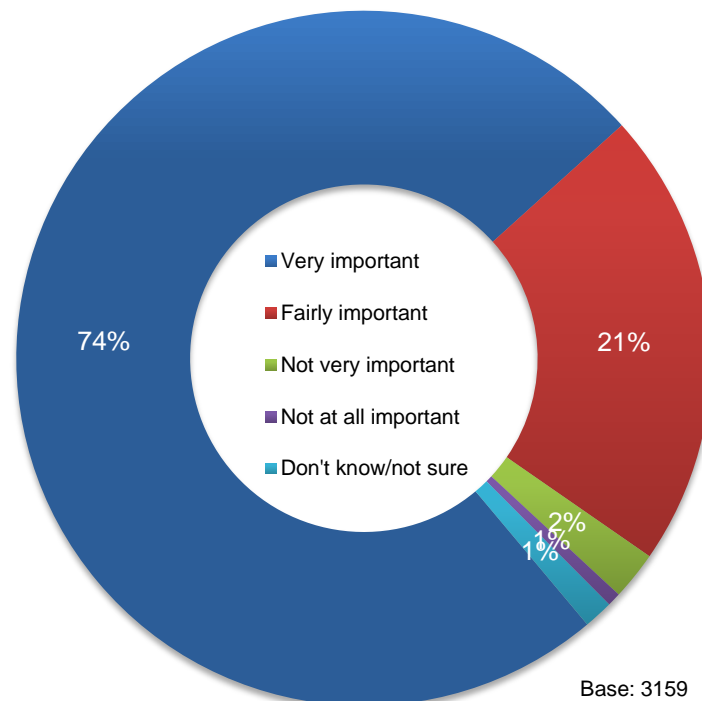
"I am surrounded by beautiful scenery, wildlife and a strong and friendly community."

"Because it provides a peaceful and tranquil environment and approach of the wildlife of Breconshire."

Looking after and promoting the historic environment and cultural heritage

Residents were asked how important they feel it is to look after and promote the historic environment and cultural heritage of the Brecon Beacons National Park. Almost all residents (95%) claim it is important; 74% claim it is 'very important' with a further 21% indicating it is 'fairly important'.

Figure 5: Importance of looking after and promoting the historic environment and cultural heritage



Views are broadly similar for all residents with no statistically significant differences between sub-groups of the population.

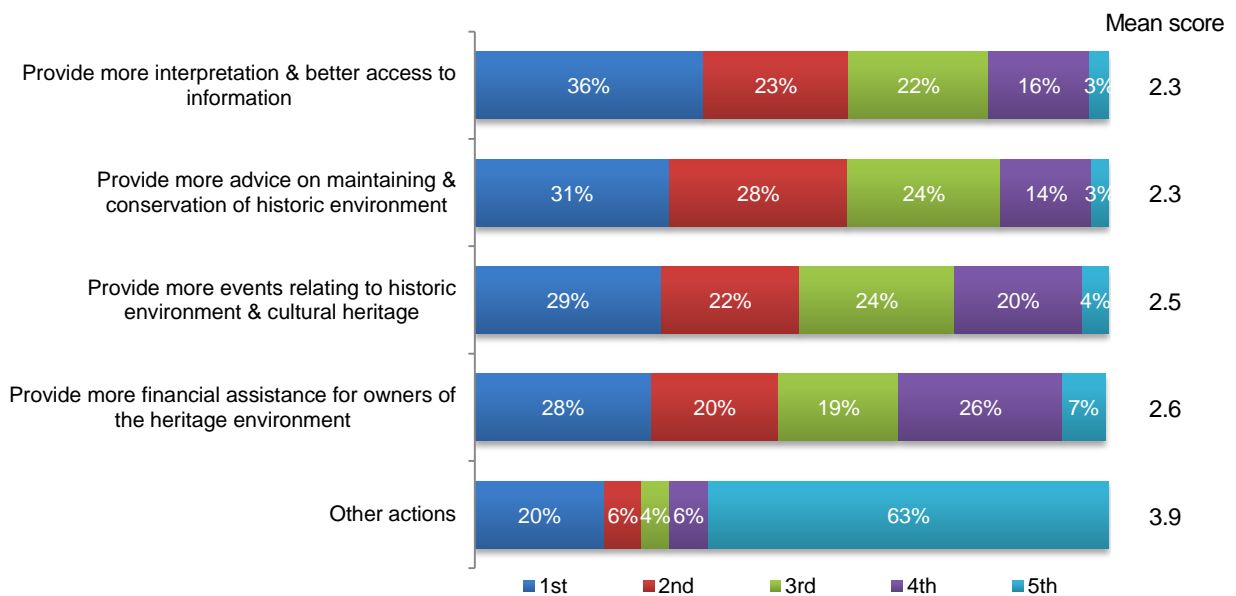
Importance of looking after and promoting the historic environment and cultural heritage

Residents were asked to rank a number of statements relating to the historic environment (e.g. historic buildings, hill forts, chapels) and cultural heritage (e.g. festivals, language) of the Brecon Beacons National Park using a scale of 1 to 5, with 1 being the most important element to them and 5 being the least important. Mean scores¹ are shown to aid comparison.

The highest ranked statement overall was to 'provide more interpretation and better access to information on the historic environment and cultural heritage' with over one-third (36%) of residents indicating this as their first most important choice. 'Providing more advice on maintaining and conservation of the historic environment' has the next highest ranking with some three in ten (31%) of residents ranking this as their first choice.

This is followed by the provision of more events relating to the historic environment and cultural heritage and the provision of more financial assistance for owners of the heritage environment.

Figure 6: Importance of looking after and promoting the historic environment and cultural heritage



Base: 850 - 2325

A small proportion of residents indicate 'other actions' as their first choice. While 850 residents chose to include other actions, just 387 commented on what they felt this 'other' action should be.

Some of these comments relate to services or actions that fall outside of the remit of the National Park Authority and relate more to actions provided by a Local Authority, e.g. road maintenance, litter control.

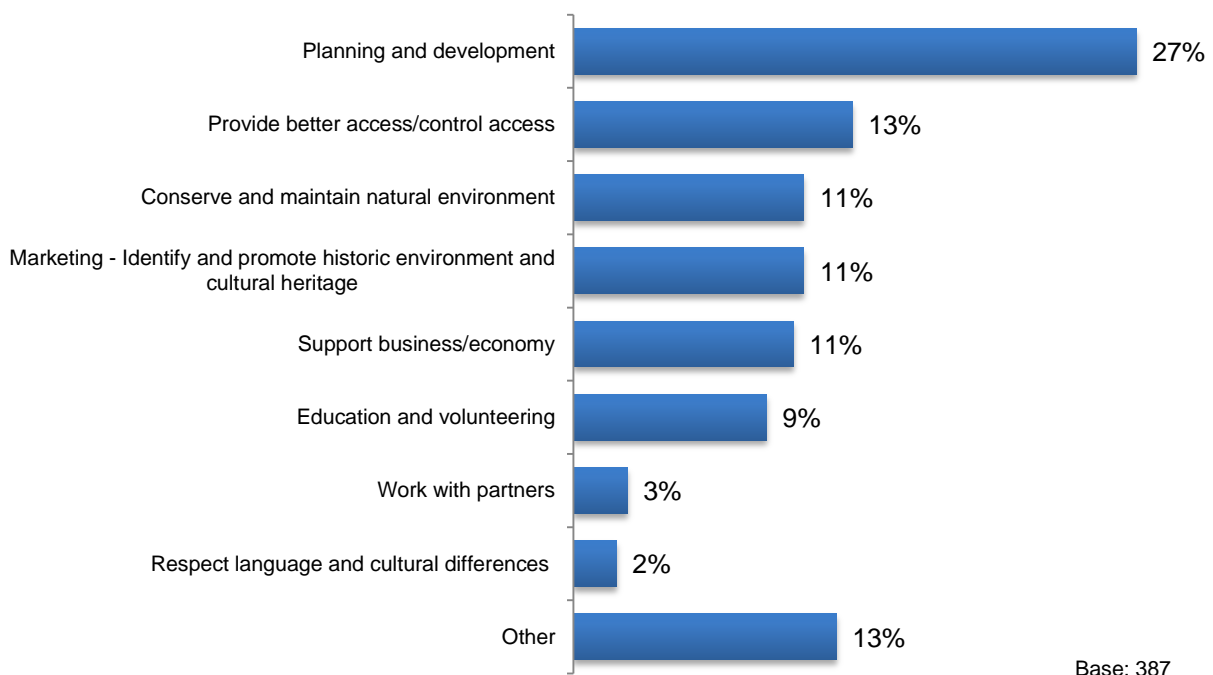
¹ Mean scores allow ranked choices to be compared by taking the proportion of all ranked choices into account. They are calculated by attributing a score of 1 to the 1st ranking, a score of 2 to the 2nd ranking, and so on, with a score of 5 given to the 5th ranking. A score closest to 1 indicates the highest level of importance, while scores closest to 5 indicate the lowest.

Over one-quarter (27%) of those providing 'other' actions the NPA could undertake to protect and promote the historic environment and cultural history of the area relate to planning control. These include some views on relaxing the current planning regulations to allow development (e.g. affordable housing), although most comments relate to considering stricter planning rules and/or better enforcement (e.g. wind turbines, inappropriate development).

Some one in ten (13%) comments focus on controlling or providing better access to the historic and cultural environment. This includes public transport, signposting (e.g. footpaths, road signs), access for the disabled and prevention of improper access (e.g. motorbikes).

A further one in ten comments relate to conserving and maintaining the natural environment, including footpaths and the countryside, litter control through the provision of bins and enforcement. A similar proportion of comments indicate a need to better market and promote the historic environment and cultural heritage. Comments here focus on the cataloguing of this heritage and promoting all that is on offer locally, nationally and internationally. Tied to this theme is a need to support local businesses, communities and the economy, through tourism for example.

Figure 7: Suggested 'other' actions the NPA should undertake to promote and protect the historic environment and cultural history of the Brecon Beacons National Park



Just under one in ten identify a greater opportunity to engage with local communities and schools via educational activities and volunteering, while 3% suggest greater partnership activities with Local Authorities and other Heritage organisations (e.g. CADW).

4. Leisure and Tourism in the Brecon Beacons National Park

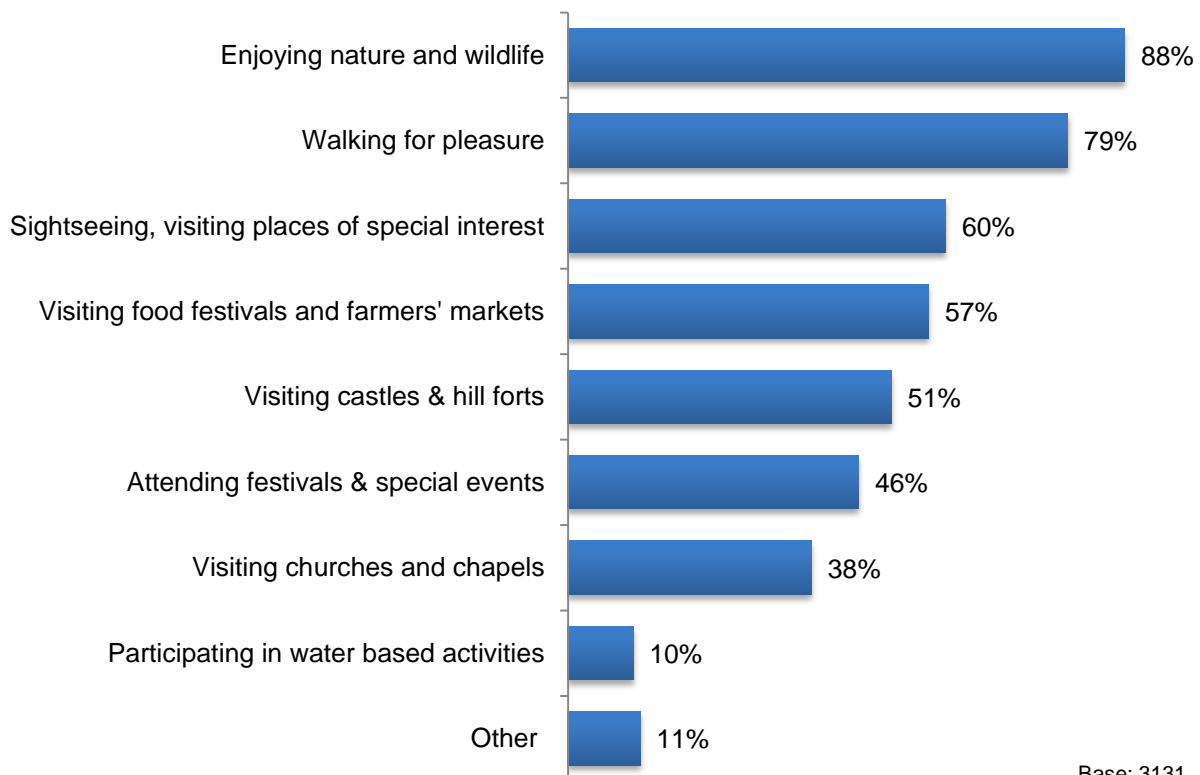
Activities enjoyed in Brecon Beacons National Park

Residents were asked which activities they enjoyed doing in the Brecon Beacons National Park.

The most popular activity is 'enjoying nature and wildlife' with over four fifths (88%) of residents indicating they participate in this activity within the National Park. This is followed by 'walking for pleasure', with some eight in ten residents (79%) indicating this.

Between five and six in ten residents also enjoy sightseeing and visiting places of special interest, including food festivals and farmers markets and visiting castles and hill forts. Attending festivals and special events (e.g. arts, music, community activities, etc) appeals to almost one half of residents, while almost two-fifths enjoy visiting the areas churches and chapels.

Figure 8: Activities enjoyed in the Brecon Beacons National Park



The least popular activity is 'participating in water based activities', with just one in ten residents indicating they do this. Perhaps unsurprisingly, this type of activity holds greatest appeal to younger residents and those with children in their household; 25% of those aged 34 and under indicate they participate in water based activities, as do 17% of those with children in their households.

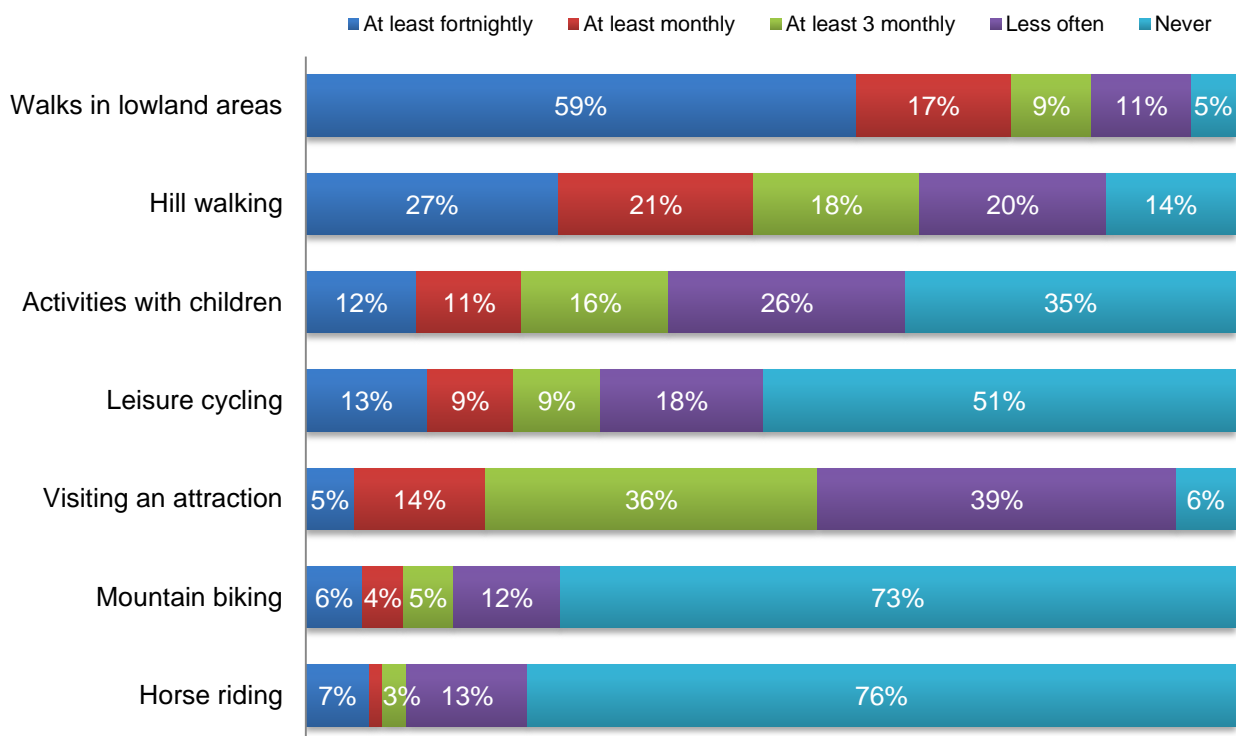
- ‘Attending festivals and events’, ‘visiting castles and hill forts’, ‘visiting food festivals and farmers’ markets’ and ‘participating in water based activities’ are all activities that are enjoyed by a significantly greater proportion of those aged 16-34.
- ‘Visiting churches and chapels’ is enjoyed more by those in the older age group of 65+ than those aged 16 to 34; 45% vs. 22%, respectively.
- Linked to age, households with children are also more likely to enjoy, ‘visiting castles and hill forts’, ‘visiting food festivals and farmers’ markets’. By comparison, a greater proportion of those without children enjoy ‘visiting churches and chapels’.

Frequency of undertaking leisure activities in Brecon Beacons National Park

Residents were asked which activities they undertook in the Brecon Beacons Park and how often they did them. ‘Walking in the lowlands’ is by far the most popular past-time with almost three-fifths (59%) of residents participating in this activity at least fortnightly. ‘Hill walking’ is the next most popular activity with over one-quarter (27%) of residents doing this at least fortnightly and a further fifth (21%) doing this at least monthly.

Just over two-fifths of residents also undertake activities with children and/or participate in leisure cycling within the National Park at least once a month.

Figure 9: Leisure activities undertaken in the National Park



Base: 2051-2859

The least frequently undertaken activities are 'horse riding' and 'mountain biking', with around three-quarters of residents indicating they have never undertaken these activities within the National Park.

There are a small number of differences in the activities undertaken, at least once a month, depending on the profile of residents.

- Proportionally fewer of those aged 65 and over participate, at least monthly, in lowland walks and hill walking compared to younger residents.
- Leisure cycling, mountain biking and horse riding on a monthly basis attracts a greater proportion of those with children in their household and those aged 35 to 54, compared to others.
- Visiting an attraction, such as a castle or museum, appeals to proportionally more of those that have lived in the area for five years or less.
- Undertaking monthly activities in the National Park with children is highest amongst those aged 35 to 44.

Some 13% of residents (418 residents) indicate a range of additional activities they participate in within the Brecon Beacons National Park, including fishing, golf, swimming, canoeing/kayaking, sailing, other sport activities, photography, bird watching and various other leisure based activities (e.g. pubs, restaurants, etc). Around one-half (51%) suggest that they participate in the activity they have indicated at least once per month.

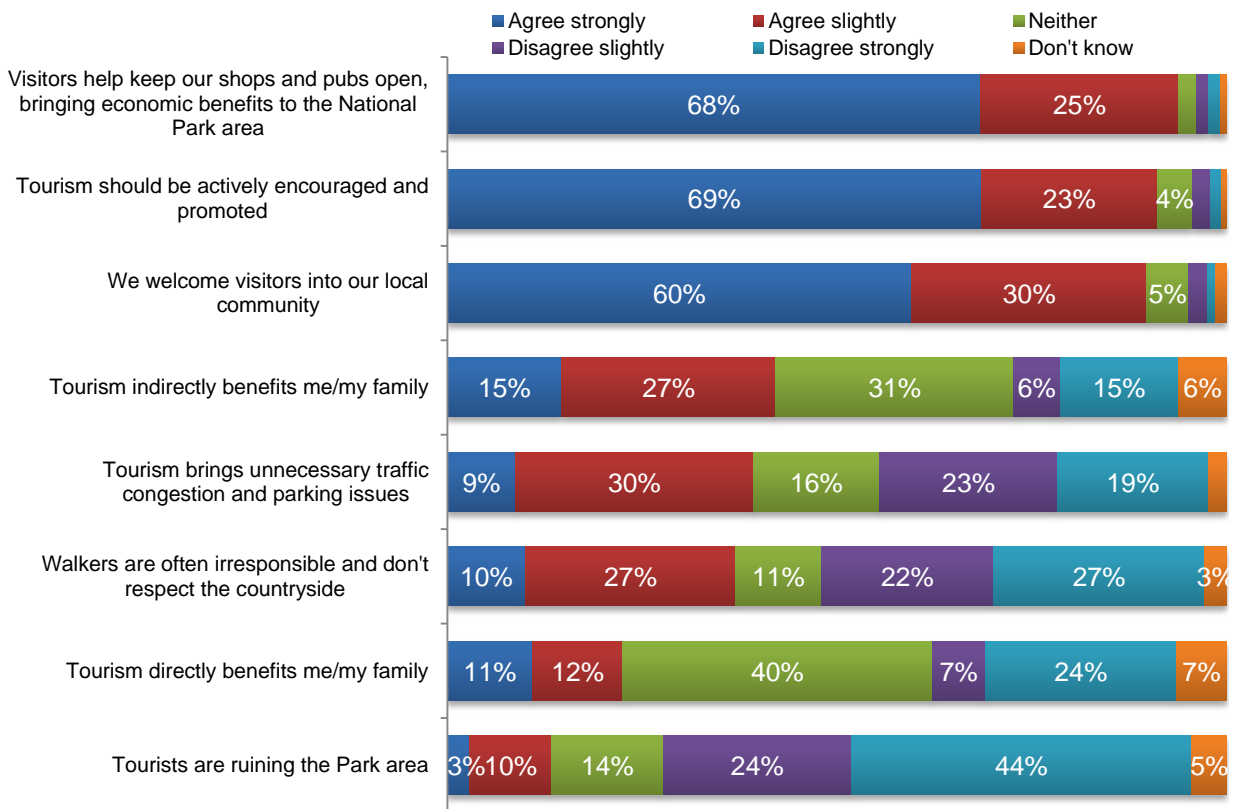
Tourism in the Brecon Beacons National Park

Residents were asked to what extent they agreed or disagreed with a list of statements regarding Tourism in the National Park.

Residents are generally supportive of tourism within the National Park area. The majority (93%) of residents agree (either strongly or slightly) that visitors help keep shops and pubs open, bringing economic benefits to the area. Some nine in ten also agree that 'tourism should be actively encouraged and promoted' and 'we welcome visitors into our local area'; 92% and 90%, respectively.

Fewer residents can agree that tourism either directly or indirectly benefits themselves and their family; 23% and 42%, respectively, agree. Views are also mixed on the issue of traffic congestion and parking problems; 39% agree that tourism brings unnecessary traffic congestion and parking problems compared to 42% that disagree.

Figure 10: Extent to which agree with statements regarding Tourism in the Brecon Beacons National Park



Base: 2753-3042

Proportionally more residents disagree (either slightly or strongly) when considering whether 'walkers are often irresponsible and don't respect the countryside'; 49% indicate this compared to 37% that agree with this statement. Over two-thirds of residents disagree that 'tourists are ruining the park area'.

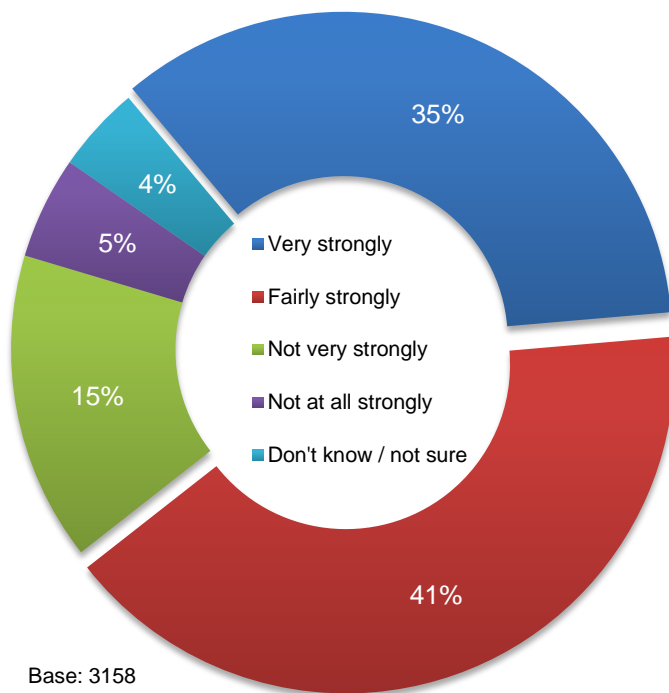
Views are broadly similar across the different sub-groups of the population.

5. The local area

Feelings regarding the local community

Residents were asked how strongly they felt they belonged to their local community. Over three-quarters (76%) of residents say they feel strongly that they belong to their local community; 35% feel very strongly about this and 41% feel fairly strongly.

Figure 11: How strongly feel belong to the local community



The strong feeling of belonging to the local community rises to 80% for those aged 65 and over and to 81% for those that have lived in the area for 21 years or more.

It falls to 69% for those aged 34 and under and 62% for those that have lived in the area for 5 years or less.

Proportionally more of those with a Welsh heritage feel a strong feeling of belonging compared to others. 79% of those indicating a Welsh national identity feel strongly that they belong to their local community compared to 72% of those from other national backgrounds.

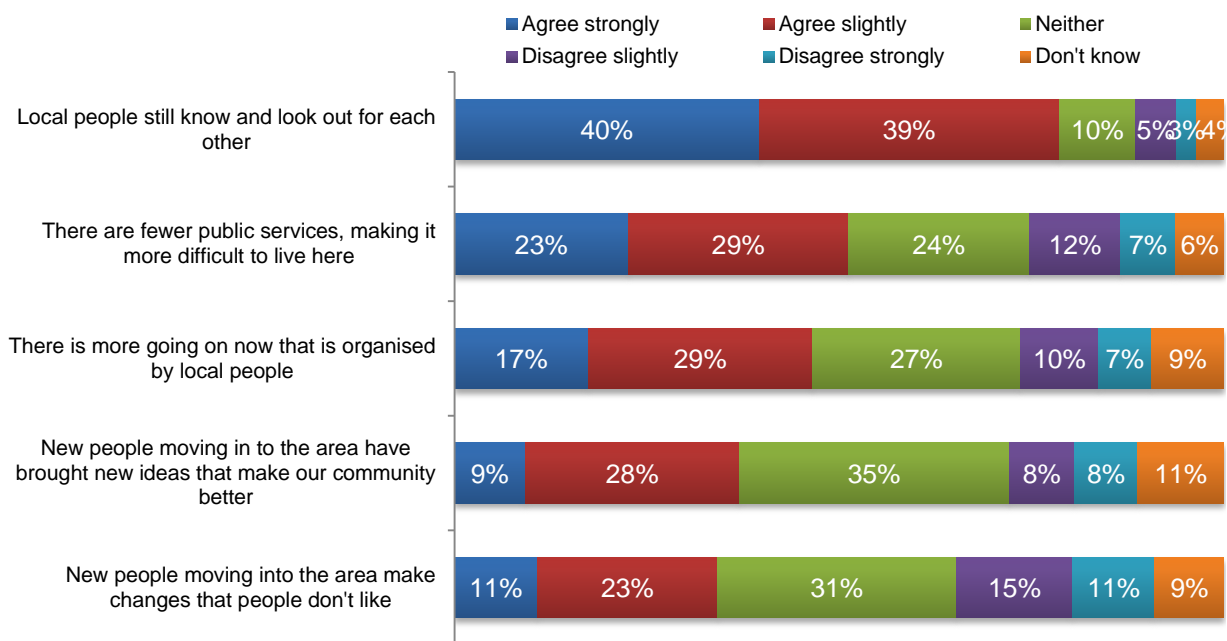
Views on the local community

Residents were then asked about the extent to which they agree with five statements regarding their local community and how it has changed in the last 10 years (or since they moved to the area if less). Views typically differ by the age group of residents.

Almost eight in ten (79%) residents agree (either strongly or slightly) that 'local people still know and look out for each other'. This figure rises to 83% for those aged 65 and over and falls to 73% for those aged 34 and under.

Just over one-half (52%) agree that 'there are fewer public services, making it more difficult to live here'; the figure falls to 41% for those aged 34 and under and 33% for those that have lived in the area for 5 years or less. A significantly higher proportion of those indicating a Welsh national identity, 57%, agree with this statement compared to 46% of those with other national identities.

Figure 12: Extent agree or disagree with statements about the local community



Base: 2926-3034

Just under one-half (46%) of residents agree that there is 'more going on now that is organized by local people'; this figure rises to 52% for those aged 65 and over and falls to 36% for those aged 34 and under.

Views on whether 'new people moving into the area bring new ideas that make the community better'; vary significantly depending on age and by their national identity. While 37% agree with this statement overall, the figure rises to 39% for those aged 65 and over and to 42% for those with a non-Welsh national identity. It falls to 29% for those aged 34 and under and to 32% for those indicating a Welsh national identity.

Finally, 34% of residents agree that 'new people moving into the area make changes that people don't like' compared to 26% that disagree. Proportionally more of those that have lived in their local area for 21 or more years and those with a Welsh national identity agree; 44% and 41%, respectively.

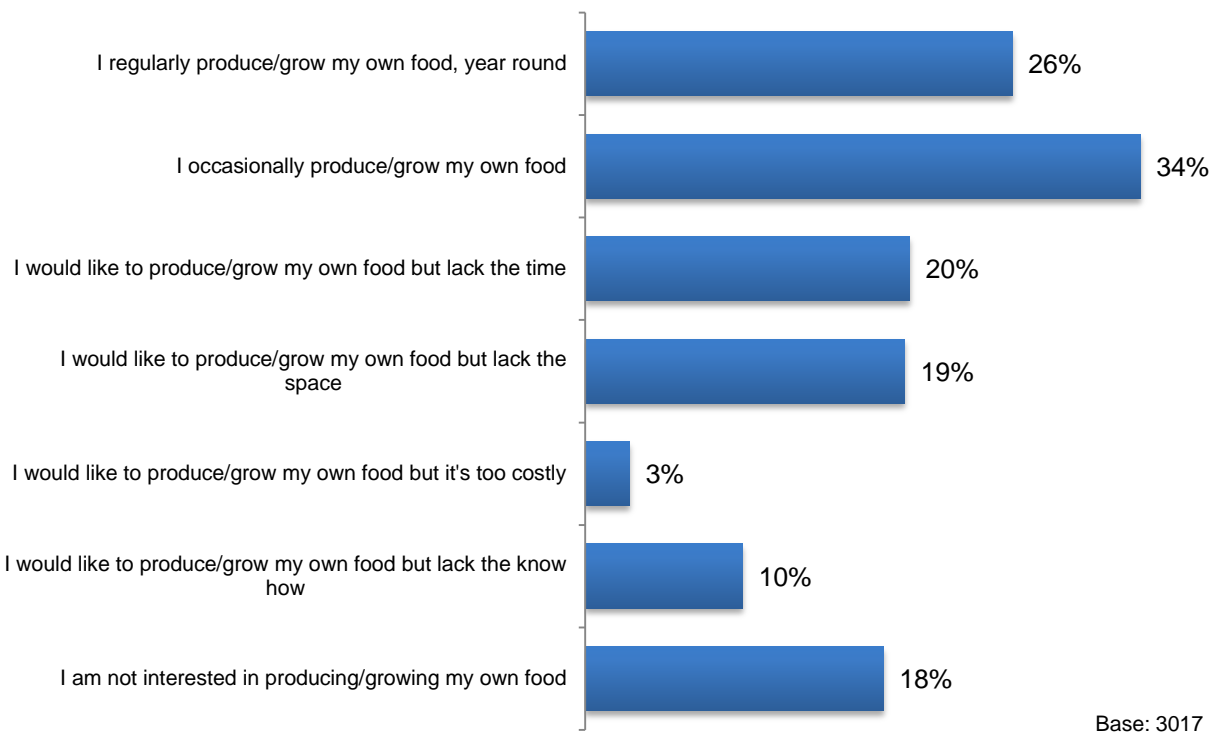
Local produce and supporting local producers/suppliers

When asked about home grown food production methods for their own consumption, over eight in ten (82%) residents indicate some interest in growing and producing their own food. This figure rises to around 90% for those aged 54 and under and falls to 75% for those aged 65 and over.

Six in ten residents currently either regularly or occasionally produce or grow their own food; 26% do this year round while 34% do this occasionally.

A fifth (20%) of residents indicate they would like to produce or grow their own food but lack the time, while a similar proportion (19%) state they lack suitable space. One in ten would like to produce or grow their own food but lack the know-how, while just 3% suggest they would do so but feel it is too costly.

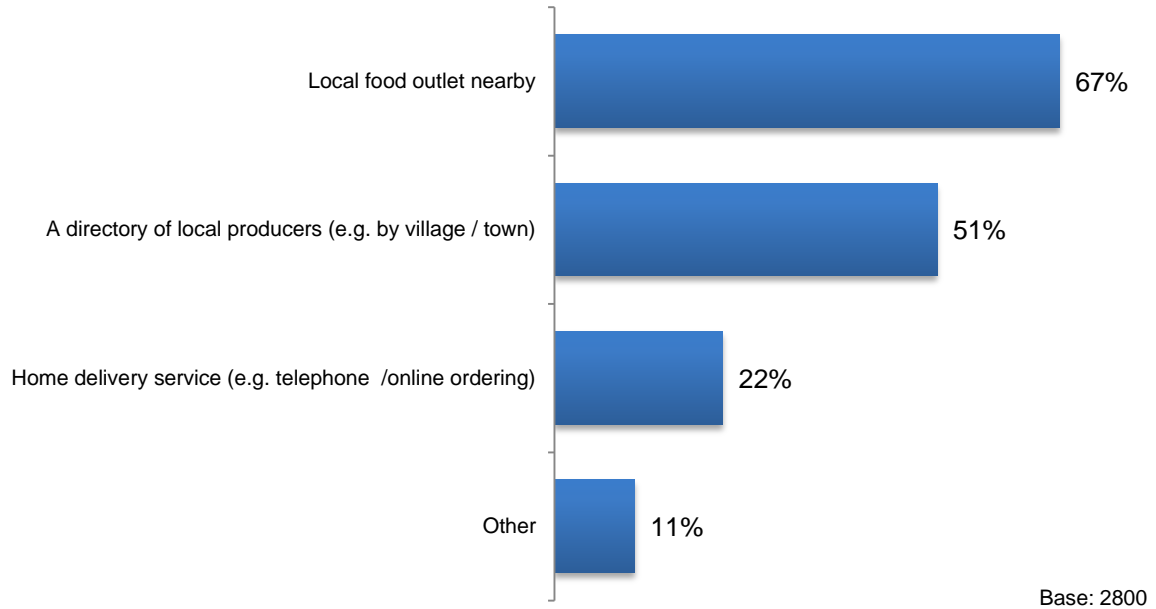
Figure 13: Food production process in your household



Proportionally fewer younger residents, those under 35, and those that have lived in the area for 5 years or less currently produce or grow their own food. More of these residents cite a lack of time, space or knowledge.

Residents were then asked what would prompt them to buy more local produce. Over two-thirds (67%) of residents indicate having a 'local food outlet nearby' would prompt them to buy more local produce, while over one-half (51%) say 'a directory of local producers' would prompt them. A home delivery service would be of interest to just over one-fifth (22%) of residents.

Figure 14: What would prompt you to buy more local produce?



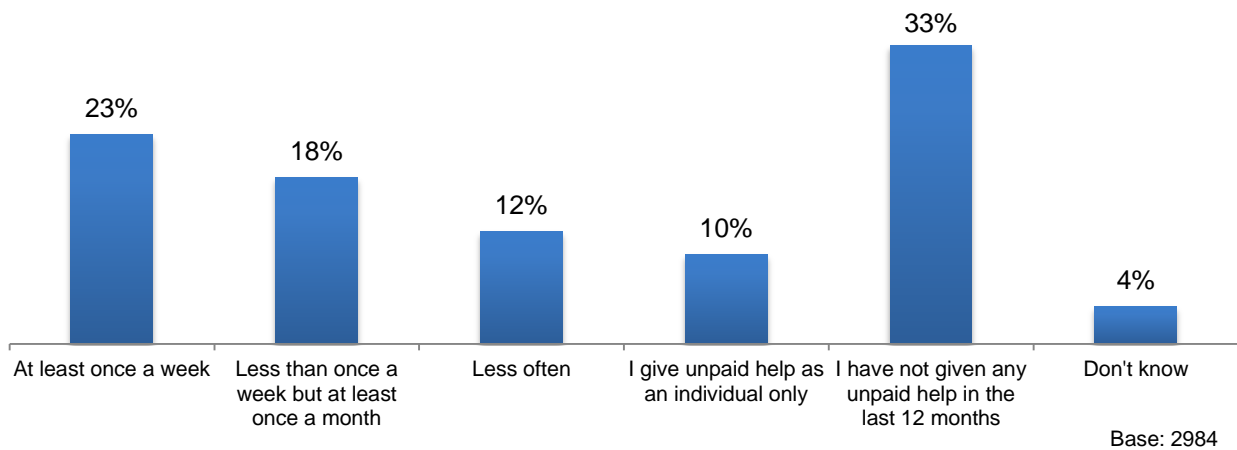
Other comments most typically focus on the cost of local produce with suggestions that more competitive pricing would prompt people to support local producers. Other residents suggest they already support local producers by 'buying local'.

Unpaid help

Residents were asked how often, if at all, they have given unpaid help in the last 12 months to any group(s), club(s) or organisation(s), excluding help given to family members.

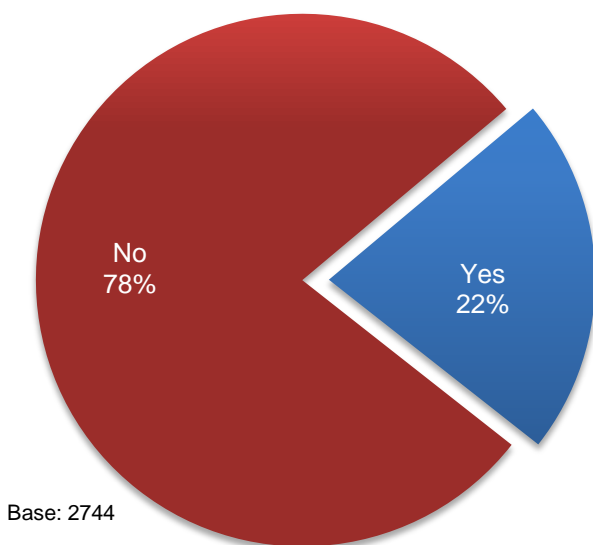
Overall, just over three-fifths (63%) of residents have indicated providing some level of unpaid voluntary help in the last year. Almost one-quarter (23%) indicate they give unpaid help at least once a week, while a further 18% do so at least monthly.

Figure 15: How often residents have given unpaid help in the last 12months



The level of civic duty towards providing unpaid help typically rises with age; 46% of those aged 65 and over claim to have provided unpaid help either weekly or at least once per month compared to just 26% of those aged 34 and under.

Figure 16: Whether have given any unpaid help in looking after the Brecon Beacons National Park



Residents were then asked if they give any unpaid help in looking after the Brecon Beacons National Park area or if they help other people enjoy it.

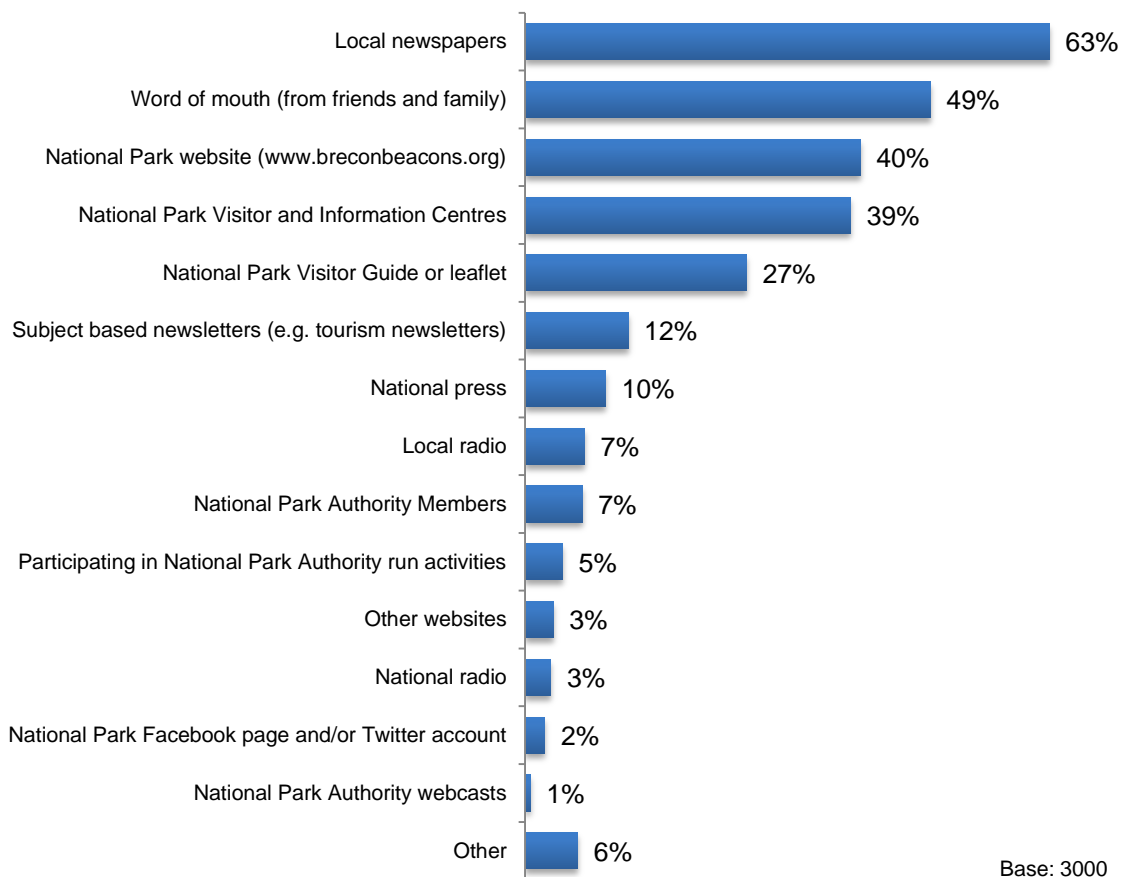
Just over one-fifth (22%) indicate that they do so. Views are broadly similar across the profile of residents.

6. Information and Communication

Information sources

Residents were asked how they find out about the work of the National Park Authority. Almost two-thirds (63%) of residents say they find out information via local newspapers and almost one-half (49%) claim that it is through word-of-mouth. Roughly two-fifths access information from the NPA website and/or through the National Park visitor and information centres. Around one-quarter (27%) have used a National Park visitor guide or leaflet for information.

Figure 17: How find out about the work of the National Park Authority



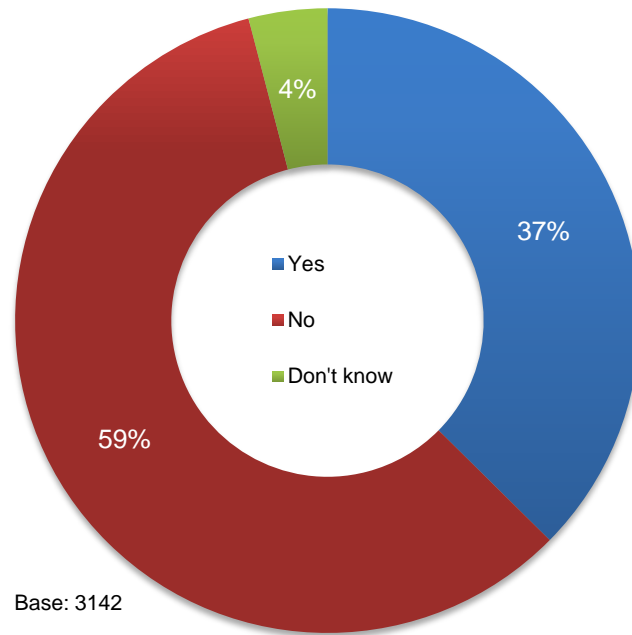
Few residents have found out about the work of the National Park Authority via the national press, local radio, NPA Members, NPA activities, other websites, national radio, the NPA Facebook and/or Twitter pages and feeds or NPA webcasts.

The use of websites, Facebook and Twitter and word-of-mouth networks is typically greatest amongst younger residents (those aged 44 and under) and those with children within their households. Older residents (those 55 and over) tend to have greater reliance on the more traditional media, such as local newspapers, national press, radio and NPA visitor and information centres to gain information.

Contact from and interest in the work of the National Park authority

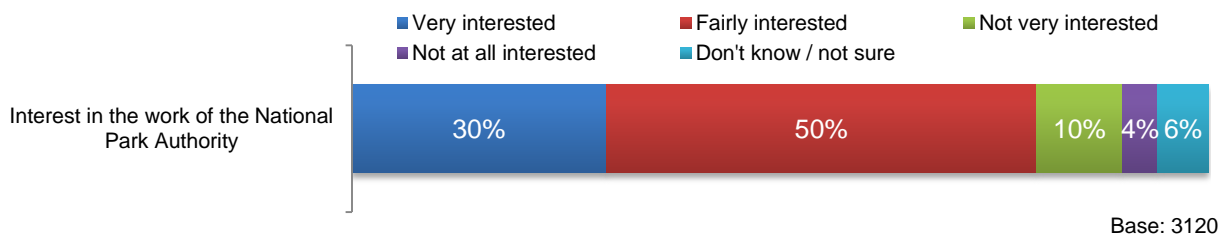
Residents were asked if they had had contact with a representative from the National Park Authority in the past 3 years. Over one-third (37%) of residents indicate that they have had contact in this period. Fewer of those aged 34 and under (28%) have had contact compared to those aged 35 to 44 (43%).

Figure 18: Contact with a National Park Authority representative in the last three years



Residents were asked how interested they were in the work of the National Park Authority. Four-fifths (80%) of residents said they were interested in the work of the National Park Authority, either very or fairly.

Figure 19: Residents' interest in the work of the National Park Authority



Those most interested in the work of the Authority are those aged 55 and over; 82% indicate they are very or fairly interested. By comparison, just 68% of those aged 34 and under claim to be interested.

Interest in the work of the Authority is also greatest for those whose national identity is not Welsh. 83% of those with other national identities are interested compared to 76% of those claiming a Welsh nationality.

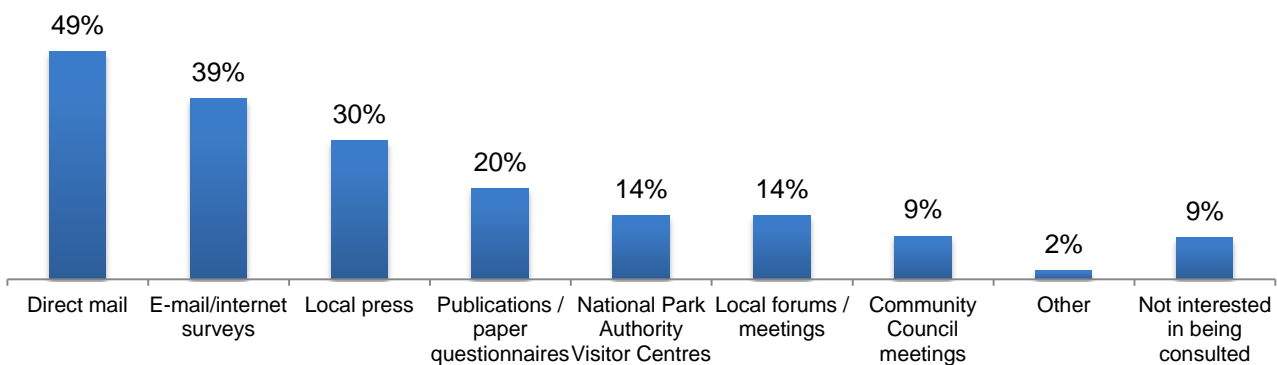
Preferred method of consultation

Residents were informed that every so often the National Park Authority would be keen to gather views on how it cares for the National Park and asked if the NPA wanted to consult with them which method(s) would be most likely to reach them. Overall, 91% of residents indicate they would be interested in some form of consultation mechanism.

Almost one-half (49%) of residents indicate that a direct mailing (through the post) would be their preferred consultation media. Interestingly, this figure is highest at 57% for those aged 34 and under.

The second most popular method is email/internet surveys, with almost two-fifths (39%) of residents selecting this. This figure rises to 54% for those aged 35 to 44 and falls to 29% for those aged 65 and over. It is the local press that has greater appeal to those aged 65 and over; while 30% overall would consider this method of consultation, the figure rises to 34% for those in the 65 and over age group.

Figure 20: Preferred method of consultation from the National Park Authority



Base: 3124

Perhaps surprisingly, the use of publications and paper questionnaires appears to appeal to a younger audience; overall while just one-fifth of residents indicate this as a preferred consultation medium yet this figure rises to 32% for those aged 34 and under².

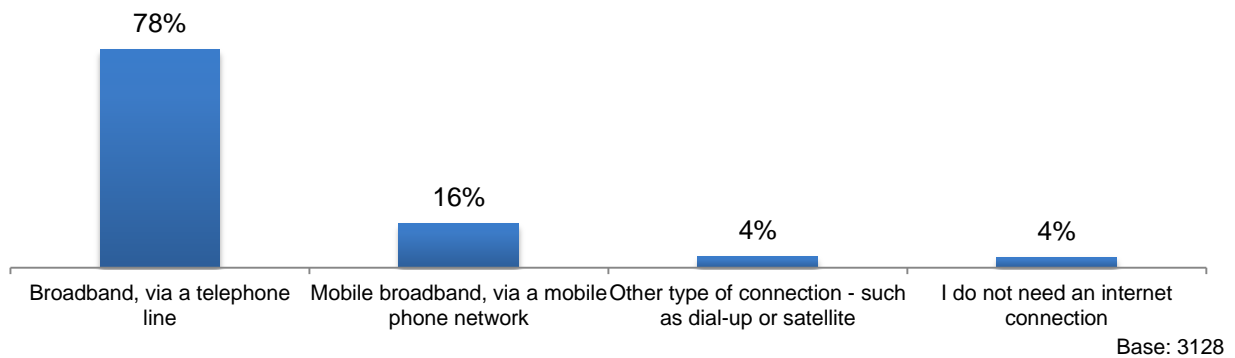
The least popular method of consultation is via community council meetings with only 9% of residents selecting this.

² We would suggest caution is exercised when considering this statistic given that just 148 residents that have participated in this postal survey fall within this age bracket, representing just 5% of the responding population.

Broadband service

Residents were asked what form of internet connection(s) they had at home. The majority (78%) indicated broadband, via a telephone line, while 16% also had mobile broadband. 4% had an alternative internet connection, and the same proportion indicated they did not need one at all.

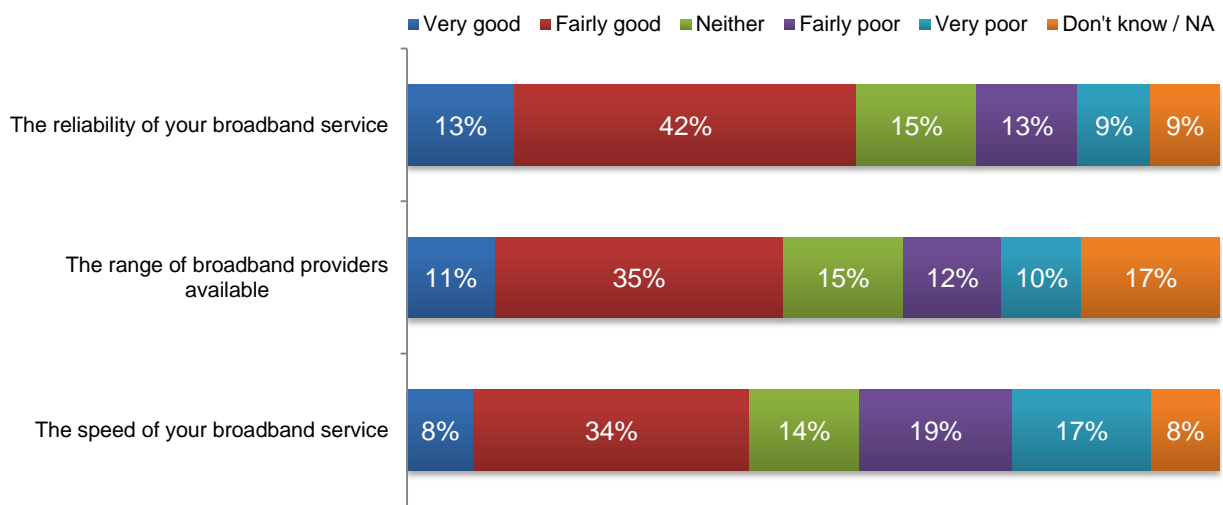
Figure 21: Type of internet connections at home



Residents were also asked how they would rate elements of broadband services where they live. The reliability of the broadband service scores highest with over one-half (55%) of residents saying this is good (either very or fairly). However, over one-fifth (22%) suggest it is poor. Just under one-half (46%) indicate the range of broadband service providers is good, while 22% say it is poor.

Broadband speed appears to be of greater concern to residents; 42% indicate that the speed of their broadband service is good while 36% indicate it is poor.

Figure 22: Rating of broadband services



Views are broadly similar across the different sub-groups of the population.

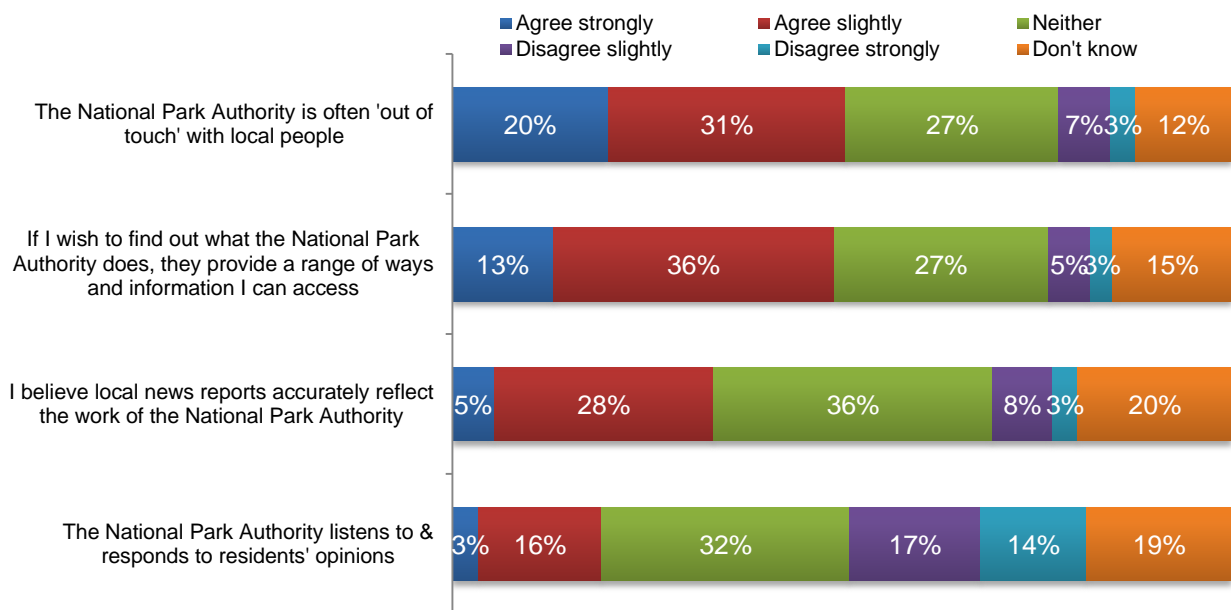
7. The National Park Authority

Perceptions about the National Park Authority

Residents were asked a range of questions about what they think of the National Park Authority. It should be noted that a relatively large proportion of residents appear to be somewhat ambivalent towards the NPA, indicating either a 'Neither agree nor disagree' answer or 'Don't know'. These two combined answers account for between 39% to 56% depending on the statement.

Overall, a majority of residents (51%) agree, either strongly or slightly, that the National Park Authority is often 'out of touch' with local people. Just 10% disagree with this statement. The level of agreement with this statement rises with age; 37% of those aged 34 and under agree, rising to 57% for those aged 65 and over. A similar pattern exists for the length of time people have lived within the area; 27% of those that have lived in the area for 5 years or less agree, rising to 60% for those that have lived in the area for 21 or more years.

Figure 23: Extent to which agree or disagree with statements regarding the National Park Authority



Base: 2765-2983

Just under one-half of residents (49%) agree, either strongly or slightly, that the NPA provides a range of ways and information, that are accessible, should people wish to find out what the Authority does. A significantly greater proportion of those with non-Welsh national identities agree; 53% vs. 45% of those with a Welsh heritage.

One-third of residents agree that local news reports accurately reflect the work of the NPA; this figure rises to 39% for those aged 65 and over and for those that have lived in the area for 21 or more years. The figure is also highest for those with a Welsh national identity; 37% agree compared to 31% of residents from other national identities.

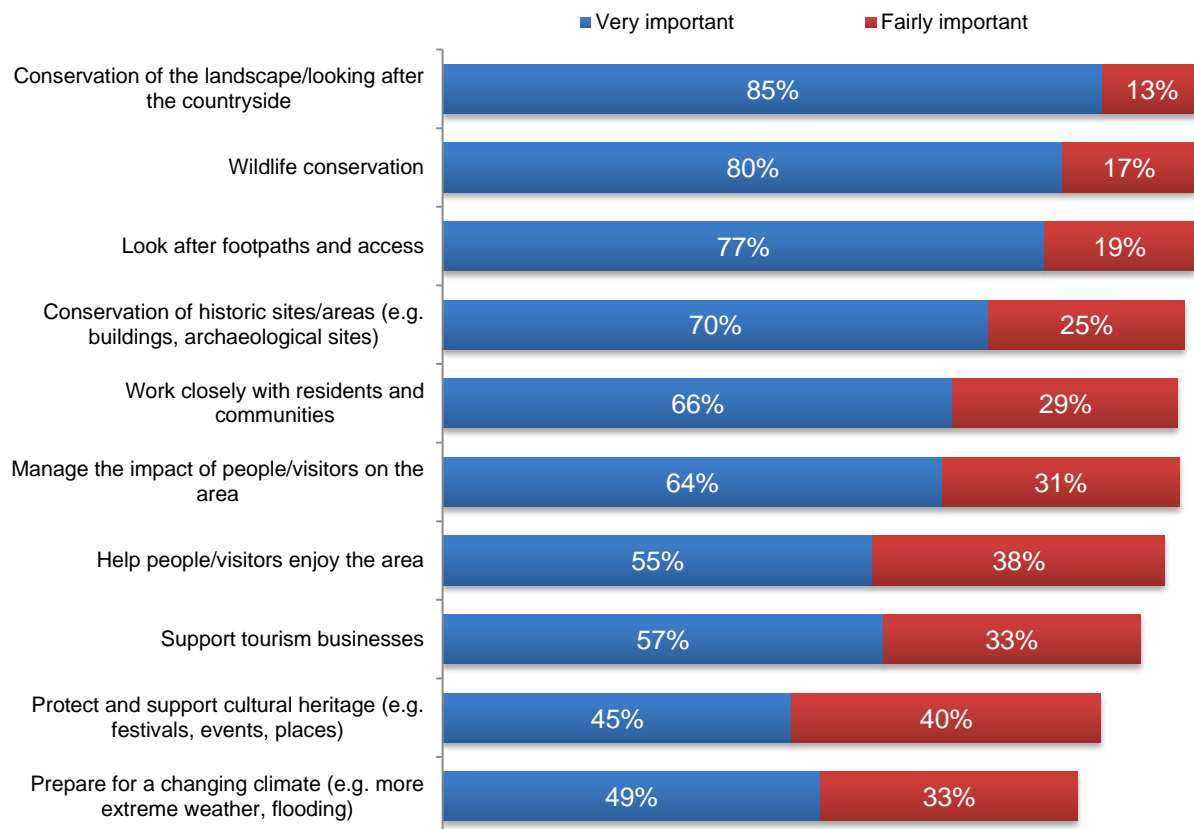
Fewer residents agree, either strongly or slightly, that the NPA listens to and responds to residents' opinions; 19% compared to 31% that disagree. 51% could not express an opinion, indicating either 'neither agree nor disagree' or 'don't know'.

Importance of National Park Authority activities

Residents were asked about how important they felt it was for the National Park Authority to undertake ten different activities. Each activity is seen to be important, either very or fairly, by more than eight in ten residents.

The top rated answer in terms of overall importance ('very important' plus 'fairly important') is 'conservation of the landscape/looking after the countryside' with 98% of residents saying this is important. This is closely followed by wildlife conservation (97%), looking after footpaths and access (97%) and conservation of historic sites and area (96%).

Figure 24: Importance of the National Park Authority activities



Base: 2912-3067

Least important overall, yet still important to 82% of residents, is preparing for a changing climate.

Views are broadly similar across the different sub-groups of the population.

Satisfaction with National Park Authority activities

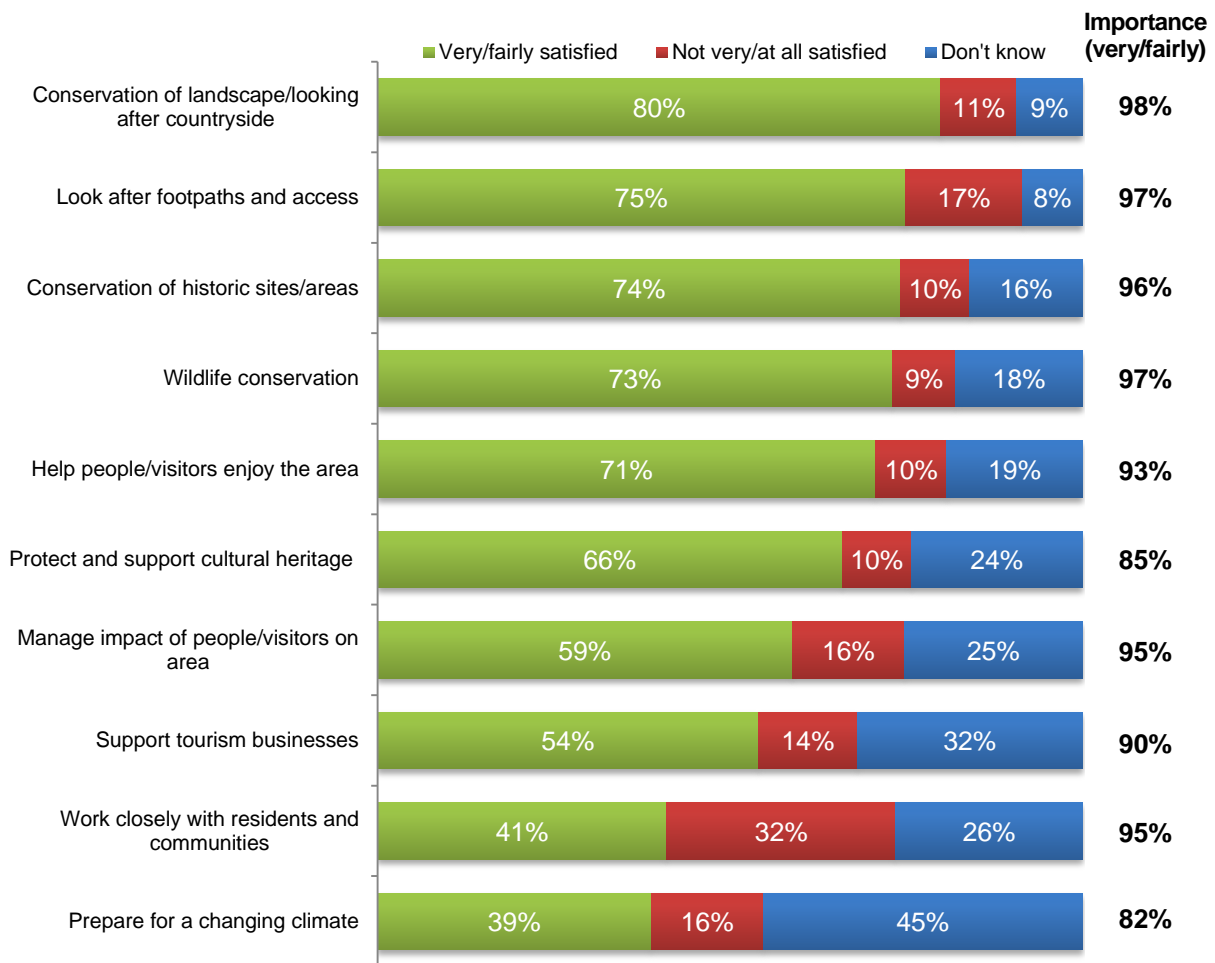
Residents were then asked how satisfied they were with the National Park Authority activities. The chart below shows the level of overall satisfaction (those saying 'very satisfied' plus 'fairly satisfied') for each of the ten listed activities.

It shows, for example, that while 'conservation of the landscape/looking after the countryside' is important to 98% of residents, 80% are satisfied (very or fairly) with how the National Park Authority is undertaking this activity.

Overall levels of satisfaction are generally high, with the exception of 'working closely with residents and communities', where 41% are satisfied and 32% are not very or not at all satisfied.

The other exception is preparing for a change in climate where 39% indicate they are very and fairly satisfied and 16% indicate they are not very or not at all satisfied. The largest proportion, 45%, could not comment (indicating 'don't know').

Figure 25: Importance and satisfaction with the National Park Authority activities



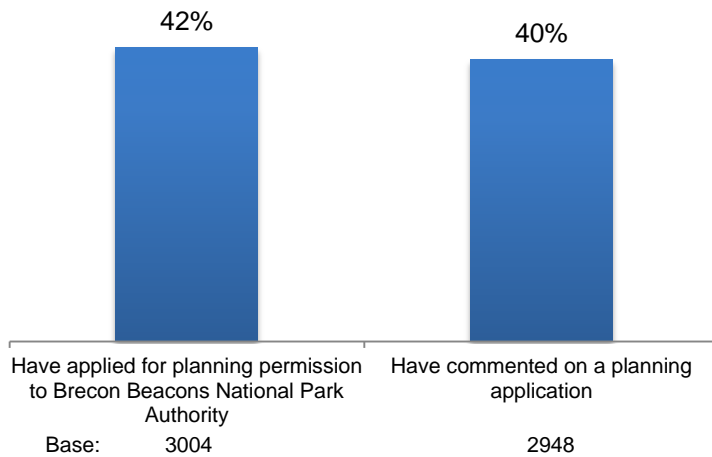
Satisfaction base: 2837-2986, Importance base: 2912-3067

Views are broadly similar across the different sub-groups of the population.

8. Planning and development control

Residents were asked a range of questions about planning permission within the National Park.

Figure 26: Whether ever made or commented on a planning application to BB NPA

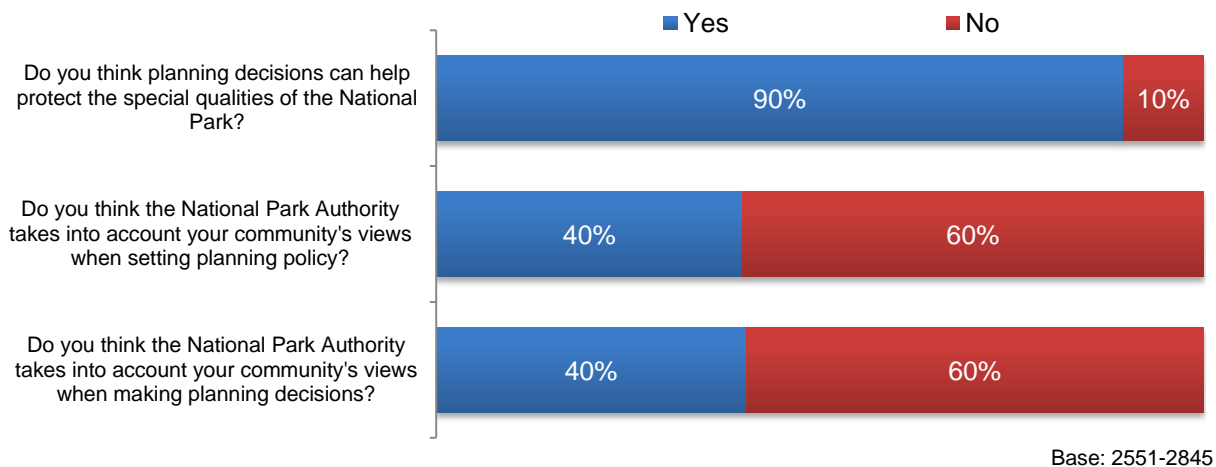


Overall, around two-fifths of residents have previously applied for planning permission and/or commented on a planning application.

Proportionally more residents aged 45 and over and those that have lived in the area for 11 or more years have made or commented on a planning application compared to others.

The majority (90%) of residents feel that planning decisions can help protect the special qualities of the National Park.

Figure 27: Views on planning permission



However, just two-fifths (40%) of residents believe that the National Park Authority takes local community views into account when setting planning policy and when making planning decisions.

Those that are most negative tend to be older residents and those that have lived in the area the longest. 54% of those aged 34 and under believe that the National Park Authority takes local community views in to account when setting planning policy. This compares to 38% of those aged 65 and over and 36% of those aged 55 to 64.

Similarly, 59% of those that have lived in the area for up to five years believe local community views are taken into account compared to 33% of those that have lived in the area for 21 years or more.

Views from those that have previously applied for planning permission from the Authority and those that have commented on an application are also less positive as the table below shows. Significantly fewer of those that have previously applied for or have commented on a planning application agree that the National Park Authority takes into account local community views compared to others.

Figure 28: Views on setting planning policy and making planning decisions in the local community

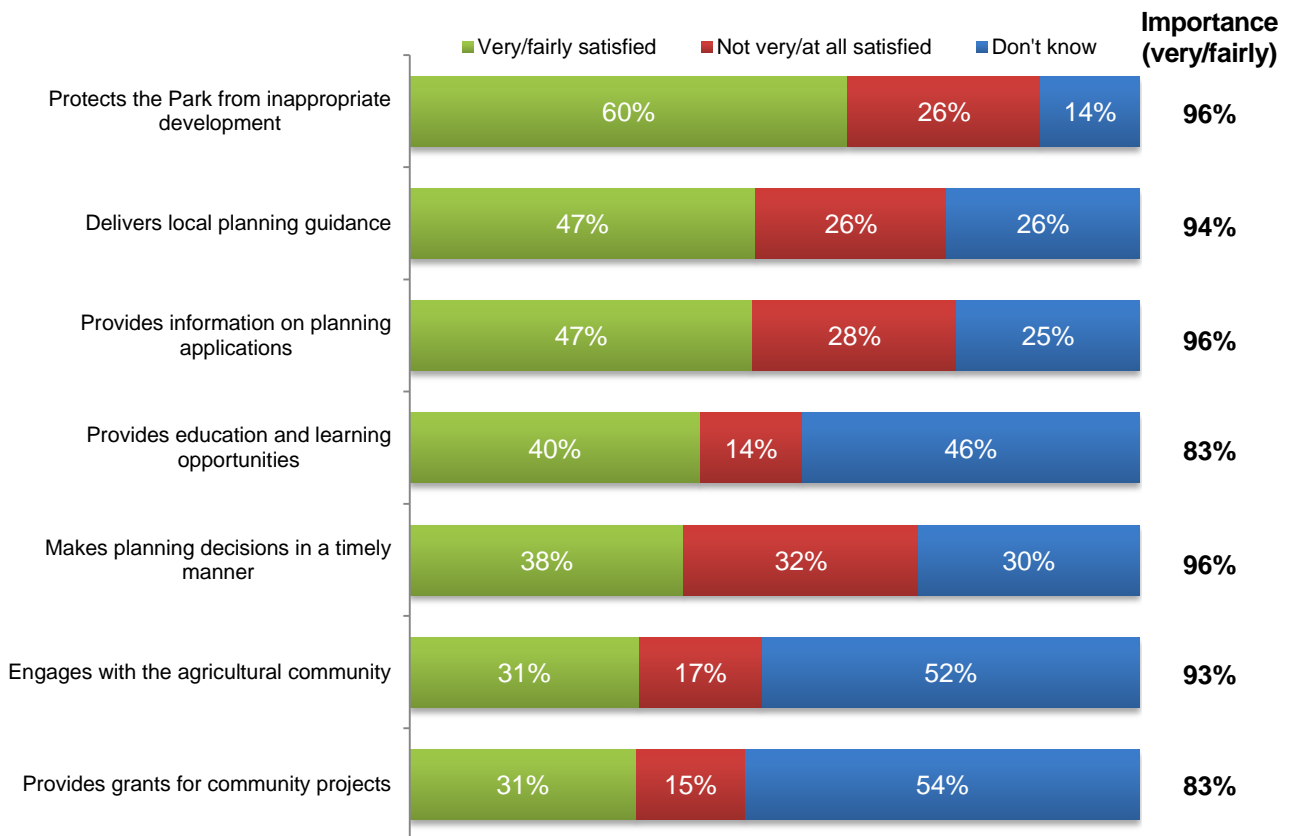
% saying yes	Applied for planning permission		Commented on a planning application	
		Not applied		Not commented
NPA takes into account your community's views when setting planning policy	36%	43%	30%	47%
NPA takes into account your community's views when making planning decisions	38%	43%	32%	47%
Base:	1117-1138	1403-1446	1063-1070	1438-1492

Statistically significant differences shown shaded in green (comparison of highest value to lowest value)

Importance and satisfaction with planning and development control

Asked to rate the importance of seven aspects of the National Park Authority’s planning and development control activities, between 83% and 96% of residents indicate each are ‘very’ or ‘fairly’ important. The most important are the provision of information on planning applications, protecting the Park from inappropriate development and making planning decisions in a timely manner, all at 96%.

Figure 29: Importance and satisfaction with the National Park Authority planning and development control



Satisfaction base: 2825-2959, Importance base: 2911-3037

Satisfaction is highest from protecting the Park from inappropriate development; 60% of residents indicate they are very or fairly satisfied with the National Park Authority’s activity in this area. The greatest levels of dissatisfaction, with residents indicating they are not very or not at all satisfied, falls within the areas of making decisions in a timely manner, providing information on planning applications, protecting the park from inappropriate development and delivering local planning guidance. Between one-quarter (26%) and one-third (32%) of residents indicate dissatisfaction with these areas.

While views on satisfaction relating to engagement with the agricultural community, the provision of education and learning opportunities and the provision of grants for community projects are generally lower (between 31% and 40% saying very or fairly satisfied), this is due to the relatively high proportion of residents that simply could not comment. Between 46% and 54% answered ‘don’t know’ to these questions.

Satisfaction with the seven aspects of the National Park Authority's planning and development control activities differs depending on whether residents have previously applied for planning or have commented on an application, as the table below shows.

For example, it shows that significantly more (proportionally) of those that have previously applied for planning permission are satisfied (either very or fairly) with how the National Park Authority delivers local planning guidance, makes planning decisions in a timely manner and provides information on planning applications compared to those that have not applied.

Significantly fewer (proportionally) of those that have commented on a planning application indicate that they are satisfied with how the National Park Authority protects the Park from inappropriate development, delivers local planning guidance, engages with the agricultural community and provides grants for community projects, compared to those that have not commented.

Figure 30: Those satisfied (very and fairly) with National Park Authority's planning and development control activities

% very and fairly satisfied	Applied for planning permission		Commented on a planning application	
	Applied for planning permission	Not applied	Commented on a planning application	Not commented
Protects the Park from inappropriate development	60%	60%	52%	65%
Delivers local planning guidance	51%	44%	45%	50%
Makes planning decisions in a timely manner	41%	35%	36%	39%
Provides information on planning applications	51%	45%	50%	46%
Engages with the agricultural community	31%	32%	27%	34%
Provides education and learning opportunities	39%	41%	37%	42%
Provides grants for community projects	29%	32%	28%	33%
Base:	1170-1210	1578-1646	1113-1153	1614-1677

Statistically significant differences shown shaded in green (comparison of highest value to lowest value)

9. Heating, water and energy in the home

Residents were asked a range of questions regarding their homes. These covered heating, water, sewage and energy saving.

Central heating

Residents were asked what type of central heating they used in their homes. The vast majority of residents, 99%, indicate some form of central heating system with almost one-half (49%) having a central heating system connected via mains gas, rising to 61% for those aged 34 and under. A further one-third (33%) say they use oil, while just under one-fifth (18%) use solid fuel, such as coal or wood.

Figure 31: Type of central heating

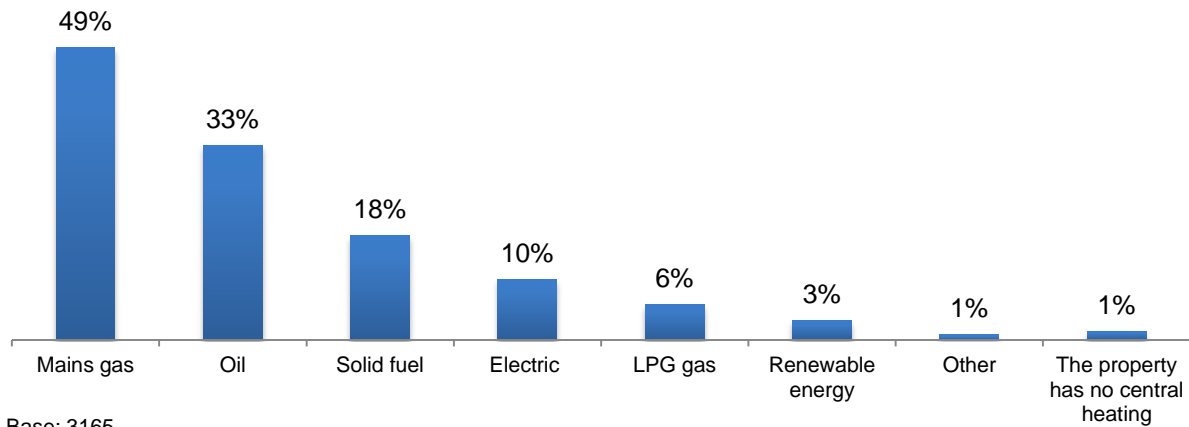


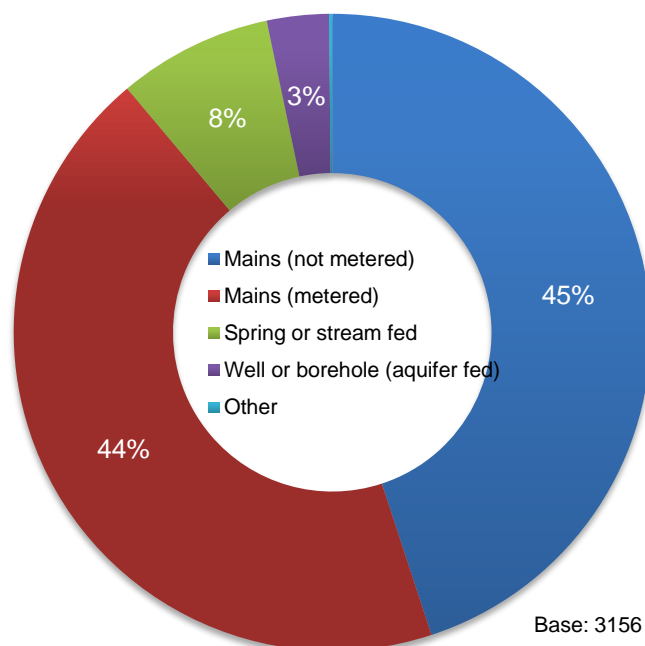
Figure 32: Type of water supply to home

Looking at the water supply to residents' homes, the vast majority, some nine in ten, are connected to the mains; 45% are connected to an unmetered supply while 44% are metered.

The remainder rely on springs or wells.

A greater proportion of those aged 65 and over are on mains metered water compared to others; 50%.

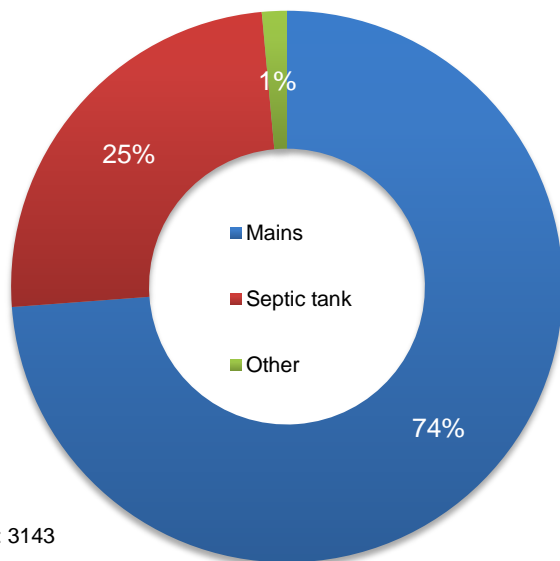
By comparison, more of those aged 34 and under are on unmetered water; 56%.



Sewage and waste water treatment and water conservation measures

Residents were then asked how sewage and waste water is treated and removed from their homes. Almost three quarters (74%) of residents indicate that their home is connected to the mains system with one-quarter using a septic tank. The remaining 1% (some 43 homes) are using bio-digester systems/cess pits or have alternative arrangements.

Figure 33: Sewage and waste water treatment and removal



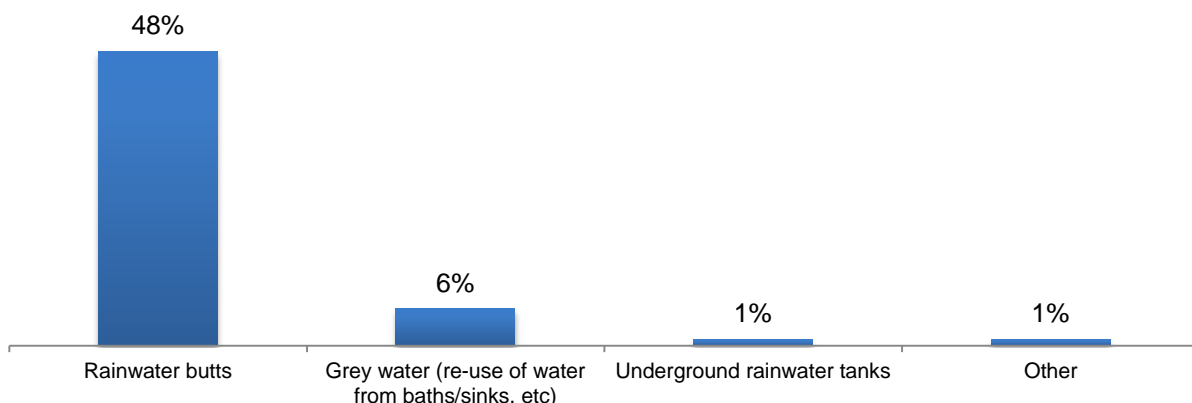
A greater proportion of residents aged 34 and under indicate they are connected to the mains sewage system; 85%.

Base: 3143

Residents were also asked what types of water conservation and recycling systems they have, if any. Please note, just 52% of residents answered this question – data has therefore been recalculated based on the full sample, to provide indicative findings, rather than show an ‘exaggerated’ figure based solely on those answering.

Just under one-half (48%) of homes are using rainwater butts or similar to conserve and recycle water. 6% use grey water systems, while 1% have underground rainwater tanks. 1% also mention other measures, such as low/reduced flow measures.

Figure 34: Type of water conservation and recycling systems

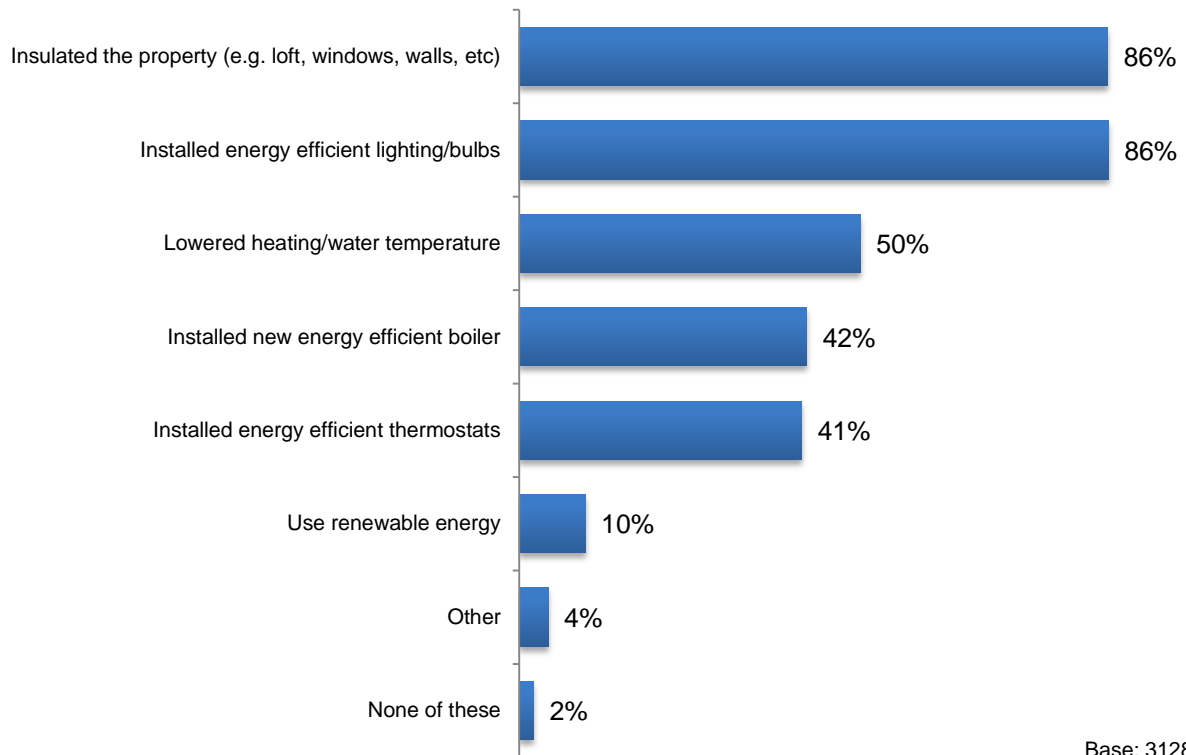


Base: 3206

Energy saving measures

The most common energy saving measures utilised by residents is the insulation of their property and the use of energy efficient lighting and bulbs; almost nine in ten (86%) indicate they do both of these. One –half also indicate they have lowered their heating and water temperature to save energy, while around two-fifths have installed an energy efficient boiler and/or thermostats.

Figure 35: Energy saving measures undertaken.



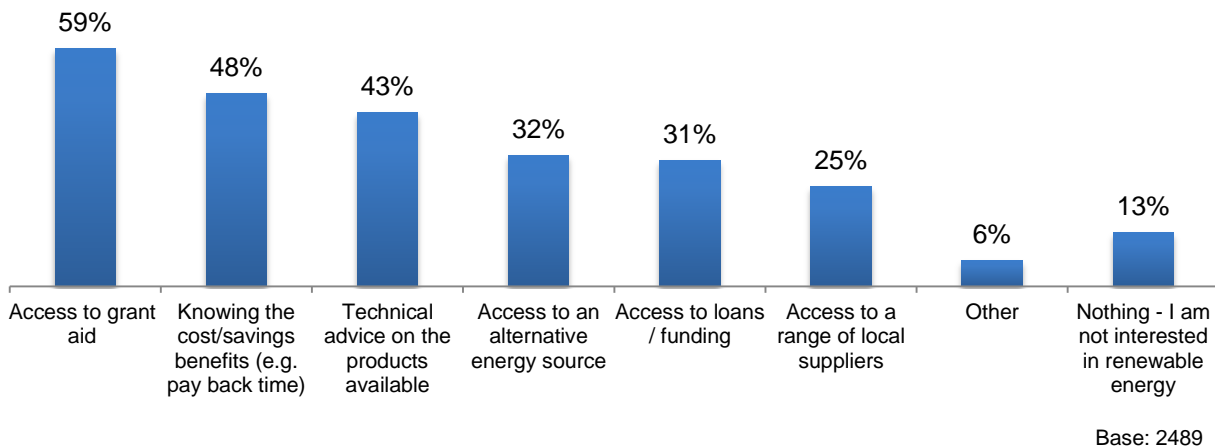
One in ten households indicate the use of renewable energy; for just over one-half of these households, this is solar/photovoltaic cells. A small number also indicate using a ‘renewable energy’ based supplier or utilise air or ground source heat pumps and/or wood burning stoves and heating.

Aside from the use of energy saving lighting and bulbs, fewer younger residents, those aged 34 and under, indicate that they have undertaken any of the other measures compared to others.

Prompts to considering energy saving measures

Residents who do not currently use renewable energy were asked what may prompt them to consider it; overall, 87% indicate they might be prompted to consider doing so. Almost six in ten (59%) residents indicate access to grant aid may prompt them to use renewable energy while around one-half (48%) say they would be prompted if they knew the cost/savings benefits.

Figure 36: Prompts to use renewable energy.



There are a small number of statistically significant differences based on the profile of residents.

- Access to grant aid would appeal to a greater proportion of households with children; 70% vs. 56% of those without children in their household.
- Knowing the costs and savings benefits would be of greater interest to those aged 34 and under; 60% indicate this.
- Access to loans and funding is of greatest appeal to those aged 44 and under.
- Significantly fewer residents aged 65 and over are interested in each of the listed measures that might prompt them to consider the use of renewable energy; 25% specifically indicate they are not interested in renewable energy.

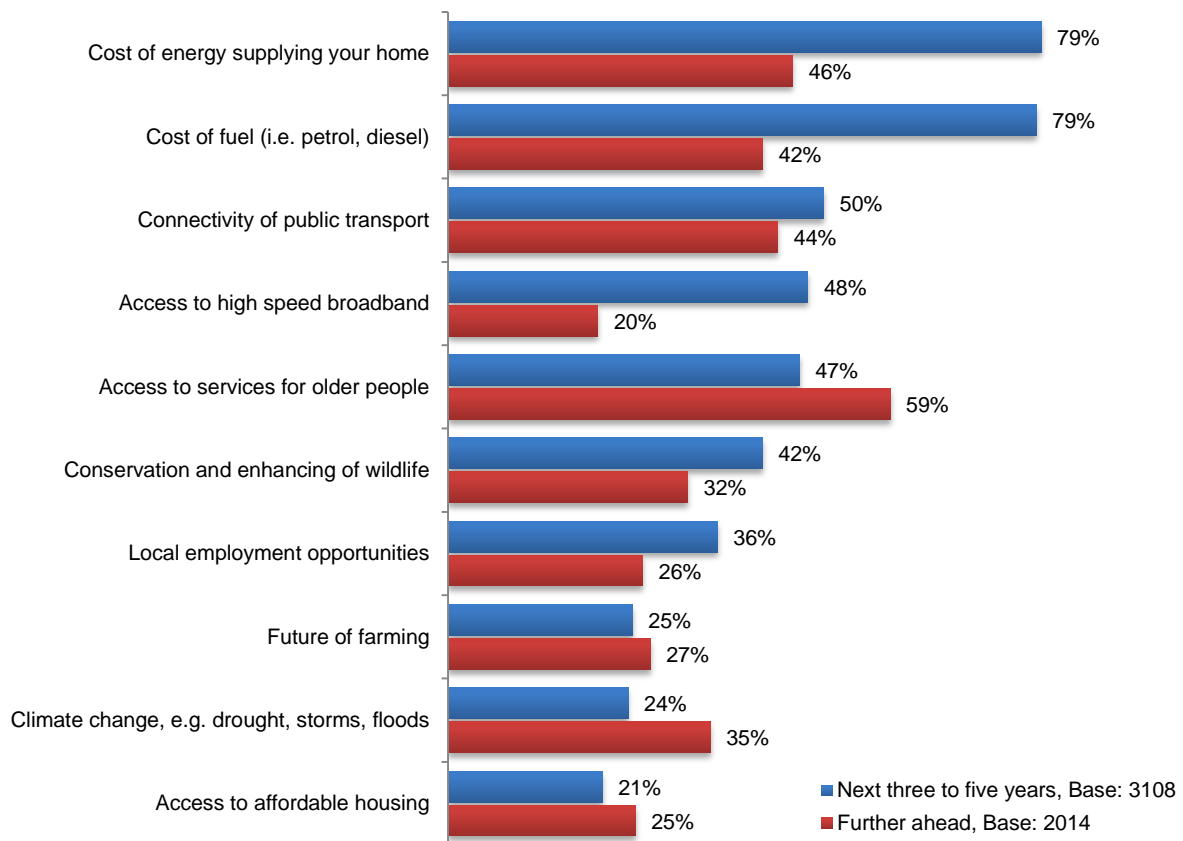
10. Future concerns

Five biggest issues

Residents were asked what their five biggest issues were in the next three to five years and further ahead from a list of potential issues.

The greatest concern for the coming three to five years is the cost of energy and fuel; almost four-fifths (79%) of residents indicate these two issues as their top concerns. Around one-half of residents also indicate the connectivity of public transport, access to high speed broadband and services for older people as being concerns in the next three to five years.

Figure 37: Biggest issues in the next three to five years and further ahead



Perhaps expectedly, the cost of fuel is of greatest concern to those aged 54 and under (84%+), while the connectivity of public transport and services for older people see a greater proportion of those aged 65 and over indicate concern (57% and 69%, respectively). Access to high speed broadband sees proportionally more of those aged 54 and under expressing concerns; 58% or more.

Looking further ahead, it is access to services for older people that comes top of the list; 59% indicate this, rising to 68% for those aged 55 to 64.

Appendices

Appendix A: Profile of respondents

Age band	Count	%	Cumulative
16 to 24	27	1%	1%
25 to 34	121	4%	5%
35 to 44	326	10%	15%
45 to 54	518	16%	31%
55 to 64	757	24%	55%
65+	1248	39%	94%
Not specified	209	6%	100%
Base (all respondents):		3206	100%

Persons in household	Count	%
One	835	26%
Two	1420	44%
Three	414	13%
Four	321	10%
Five or more	127	4%
Not specified	89	3%
Base (all respondents):		3206

Children under 17 in household	Count	%
One	277	9%
Two	277	9%
Three	71	2%
Four	18	1%
Five or more	7	0.2%
None/Not specified	2556	80%
Base (all respondents):		3206

Time lived in BB National Park area	Count	%
Less than 1 year	109	3%
1 to 2 years	164	5%
3 to 5 years	226	7%
6 to 10 years	428	13%
11 to 20 years	577	18%
21 years or more	1687	53%
Not specified	15	1%
Base (all respondents):		3206

National identity	Count	%
Welsh	1538	48%
English	657	21%
Scottish	28	1%
Northern Irish	7	0%
British	875	27%
Other	74	2%
Not specified	27	1%
Base (all respondents):	3206	100%

Welsh language capability	Count	%
None speaker	1546	48%
Limited (e.g. greetings/pronunciation of place names)	1192	37%
Intermediate (basic conversation)	294	9%
Advanced/ fluent	142	4%
Not specified	32	1%
Base (all respondents):	3206	100%

Ethnicity	Count	%
White - English/Welsh/Scottish/Northern Irish/British	3030	95%
White - Irish	20	1%
White - Gypsy or Irish Traveller	2	0%
Any other White background	33	1%
Asian/Asian British - Indian	5	0%
Asian/Asian British - Pakistani	-	-
Asian/Asian British - Bangladeshi	-	-
Asian/Asian British - Chinese	4	0%
Any other Asian background	11	0%
Black/Black British - African	1	0%
Black/Black British - Caribbean	-	-
Any other Black/African/Caribbean background	-	-
Mixed - White and Black Caribbean	-	-
Mixed - White and Black African	-	-
Mixed - White and Asian	-	-
Any other mixed/multiple ethnic background	2	0%
Arab	1	0%
Any other ethnic group	18	1%
Not specified	79	3%
Base (all respondents):	3206	100%

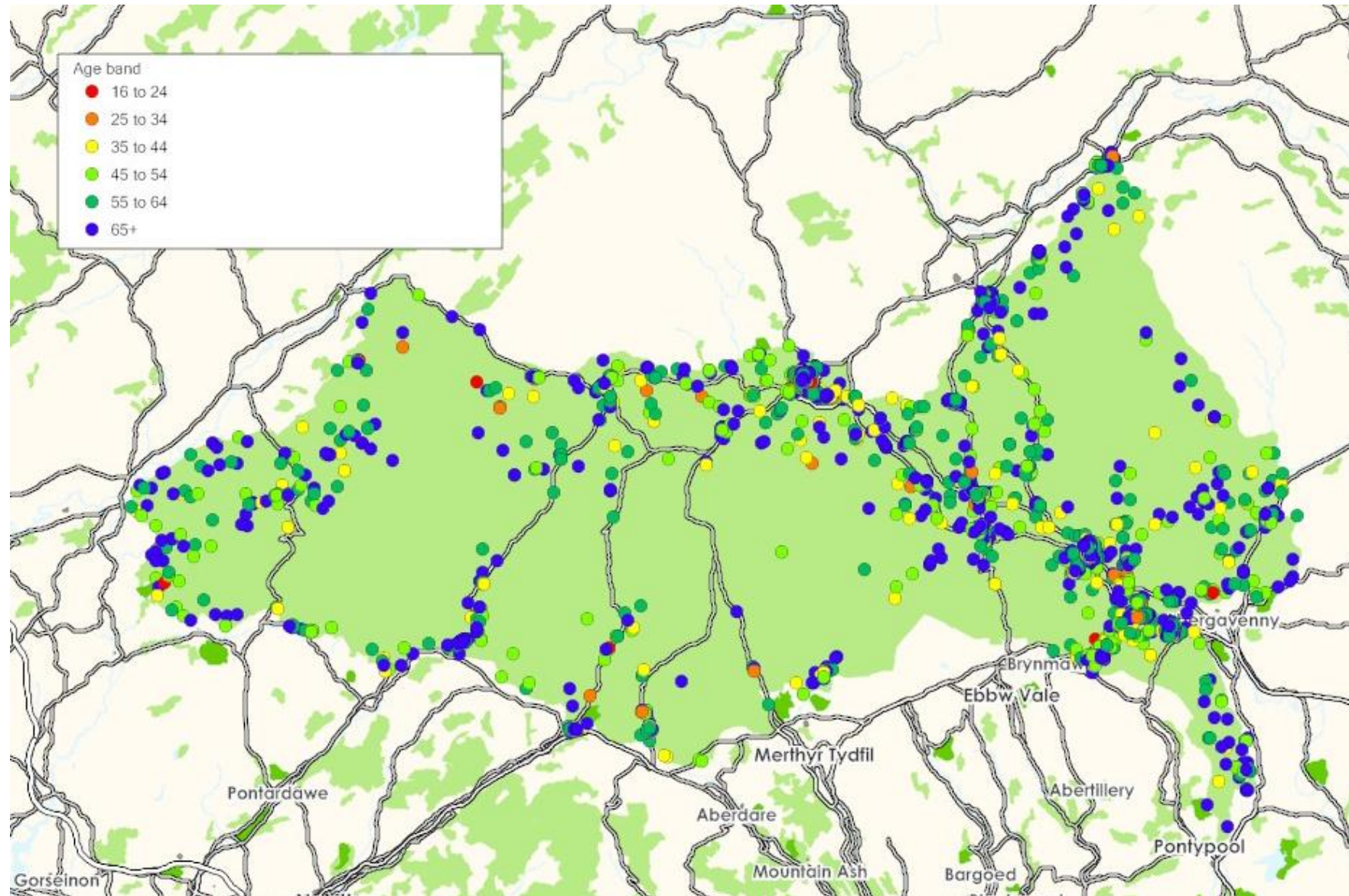
Working status	Count	%
Working full time (35 or more hours per week)	877	27%
Working part time (less than 35 hours per week)	311	10%
Self employed or freelance	359	11%
Casual or other form of paid employment	13	0%
Out of work and looking for work	42	1%
Out of work but not currently looking for work	22	1%
Looking after the home	59	2%
Student	11	0%
Retired	1415	44%
Other (please specify below)	43	1%
Not specified	54	2%
Base (all respondents):		3206 100%

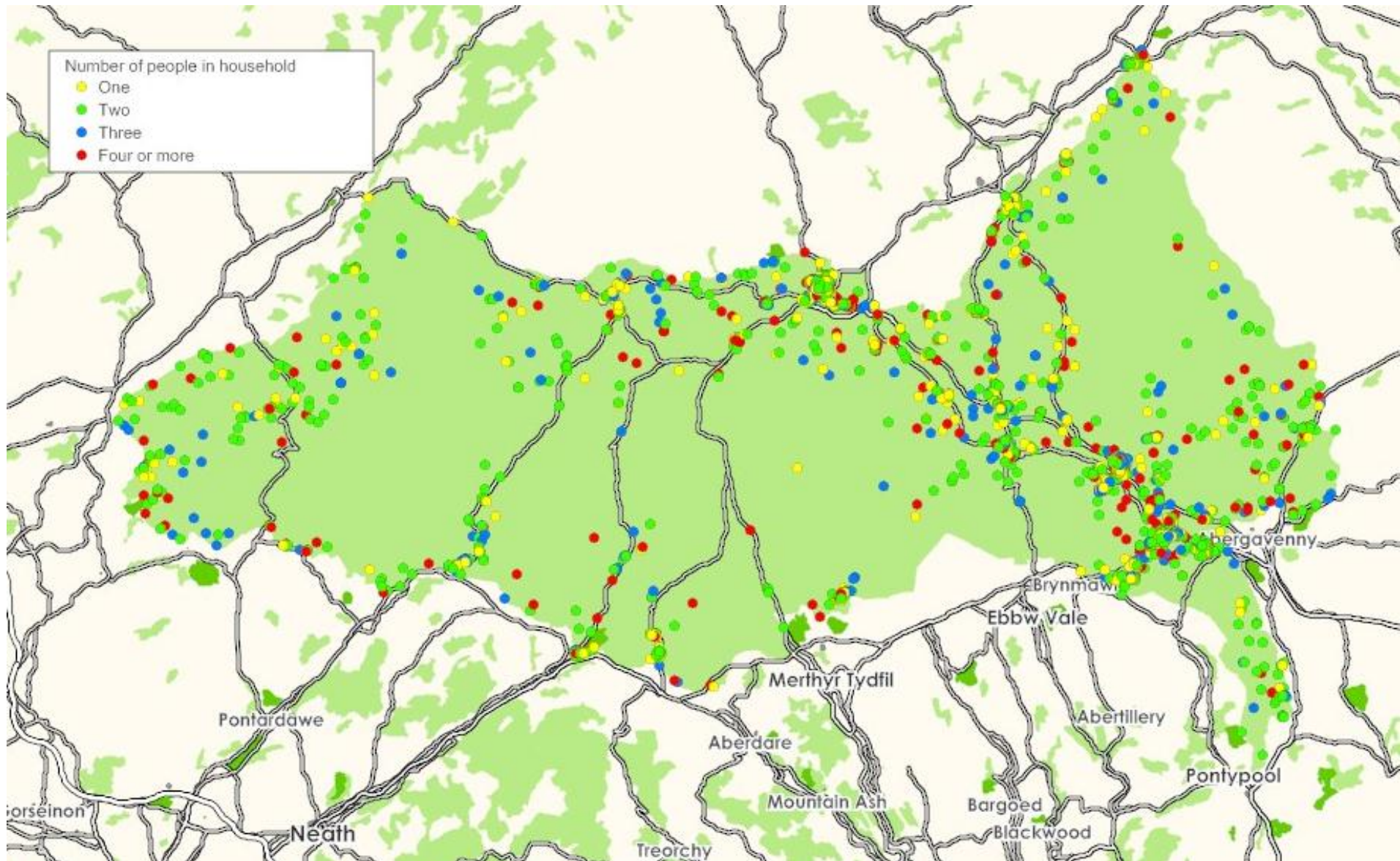
Hours worked per week	Count	%
15 or less	183	12%
16 to 30	317	20%
31 to 48	706	45%
49 or more	319	20%
Not specified	35	2%
Base (those in employment):		1560 100%

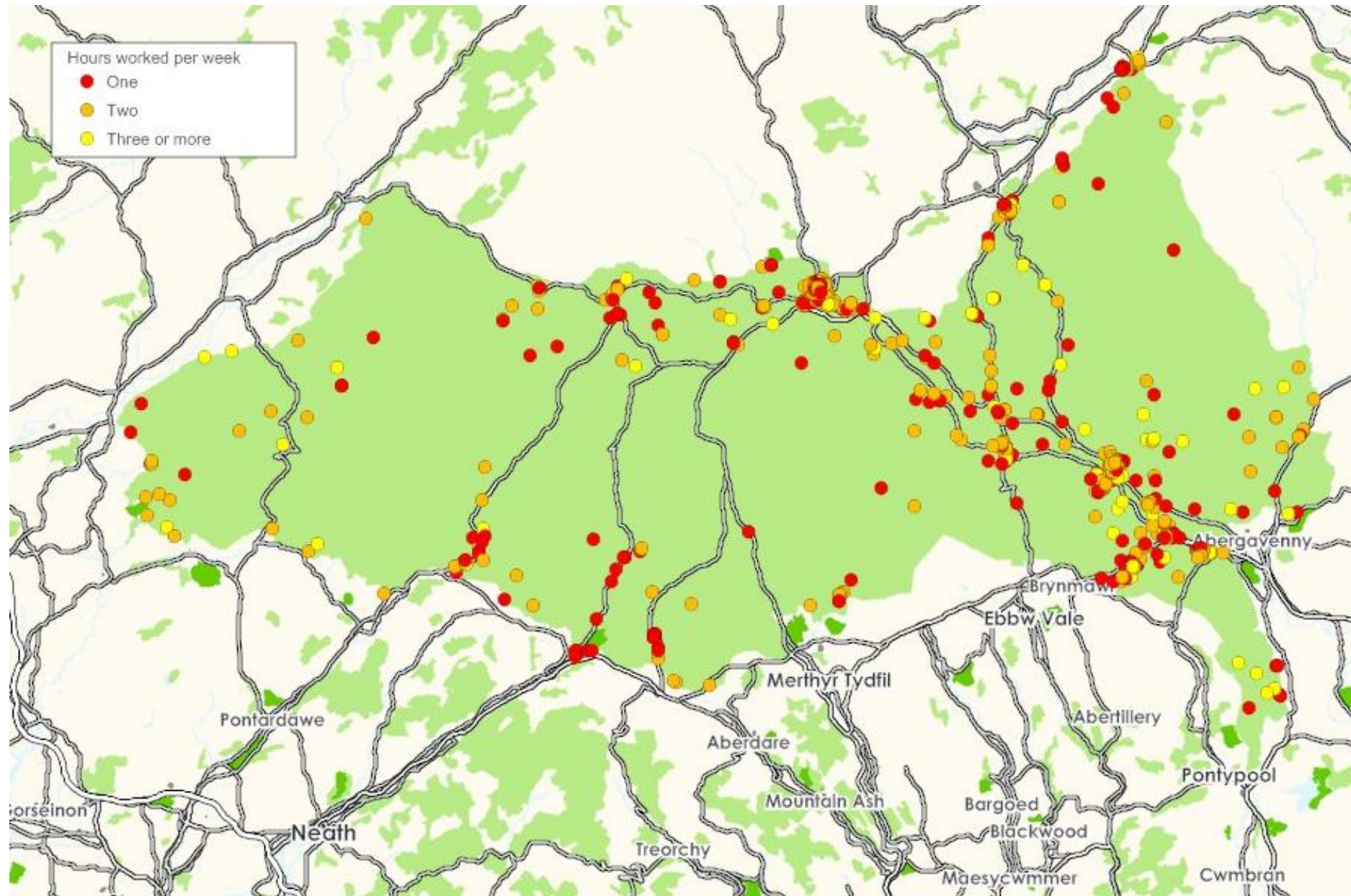
Usual travel to work mode	Count	%
Drive a car or van	1109	71%
Passenger in a car or van	30	2%
Motorcycle, scooter or moped	14	1%
Bus, minibus or coach	18	1%
Train	44	3%
Taxi	1	0%
Cycle	43	3%
Walk	173	11%
Work mainly at or from home	279	18%
Other	20	1%
Not specified	18	1%
Base (those in employment):		1560

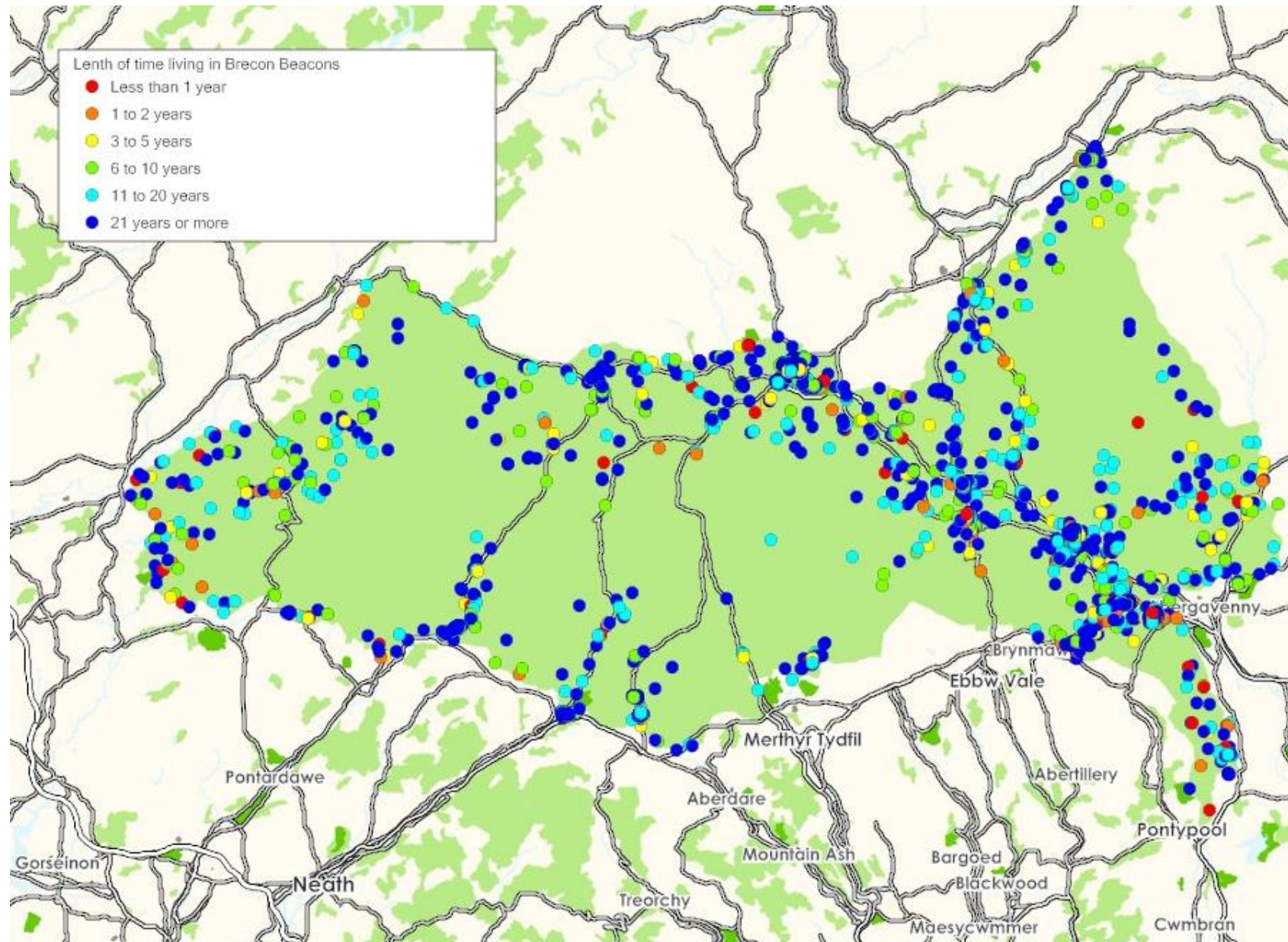
Work: one-way journey mileage	Count	%	Cumulative
Up to 1 mile	129	13%	13%
1 mile to 3 miles	186	18%	31%
3.1 miles to 5 miles	80	8%	39%
5.1 miles to 10 miles	147	15%	54%
10.1 miles to 20 miles	180	18%	72%
20.1 miles to 30 miles	105	10%	82%
30.1 miles to 40 miles	63	6%	88%
40.1 miles to 50 miles	41	4%	92%
50 + miles	55	5%	98%
Varies	21	2%	100%
Base: (those answering)		1007	100%

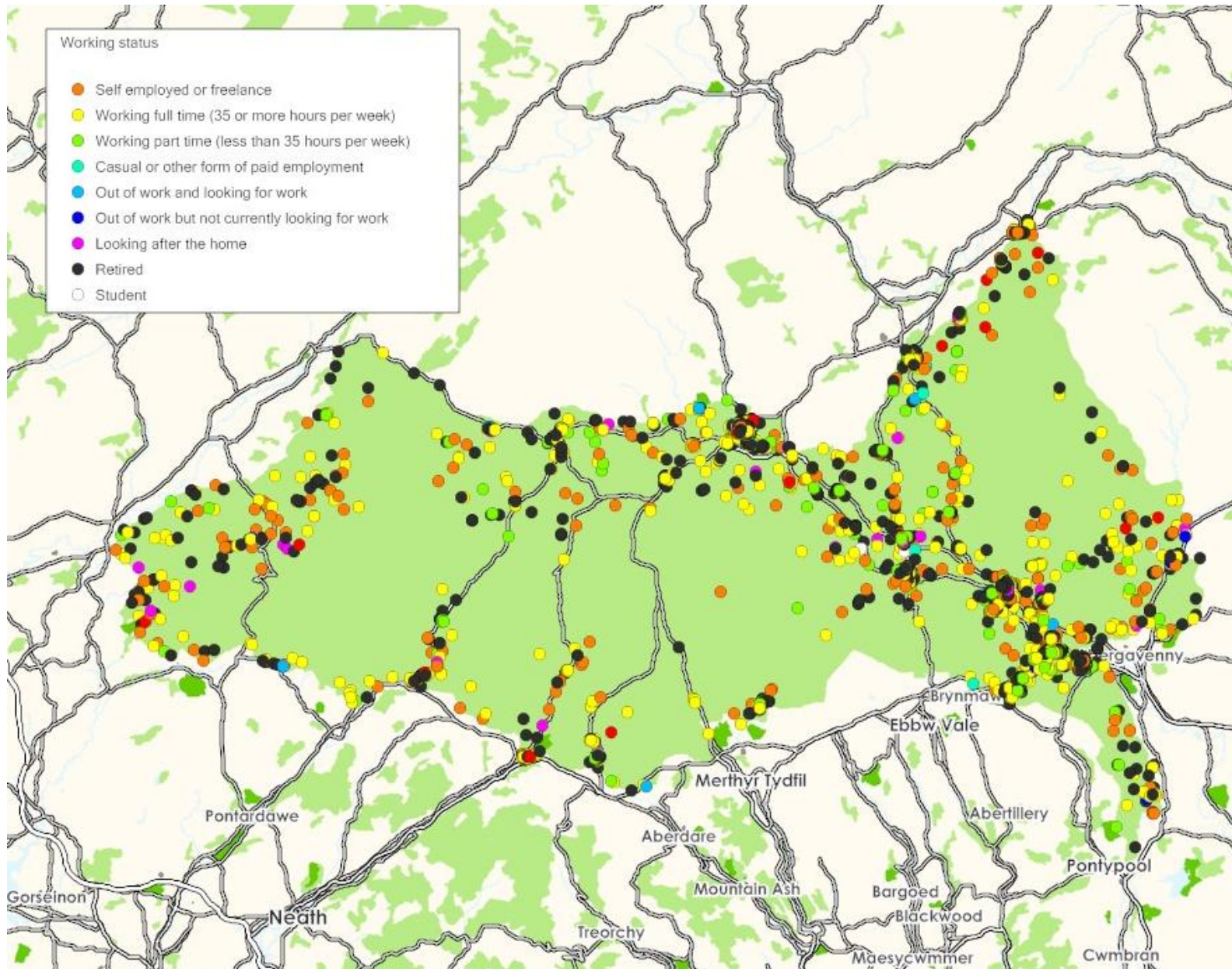
Appendix B: Mapped profile of respondents

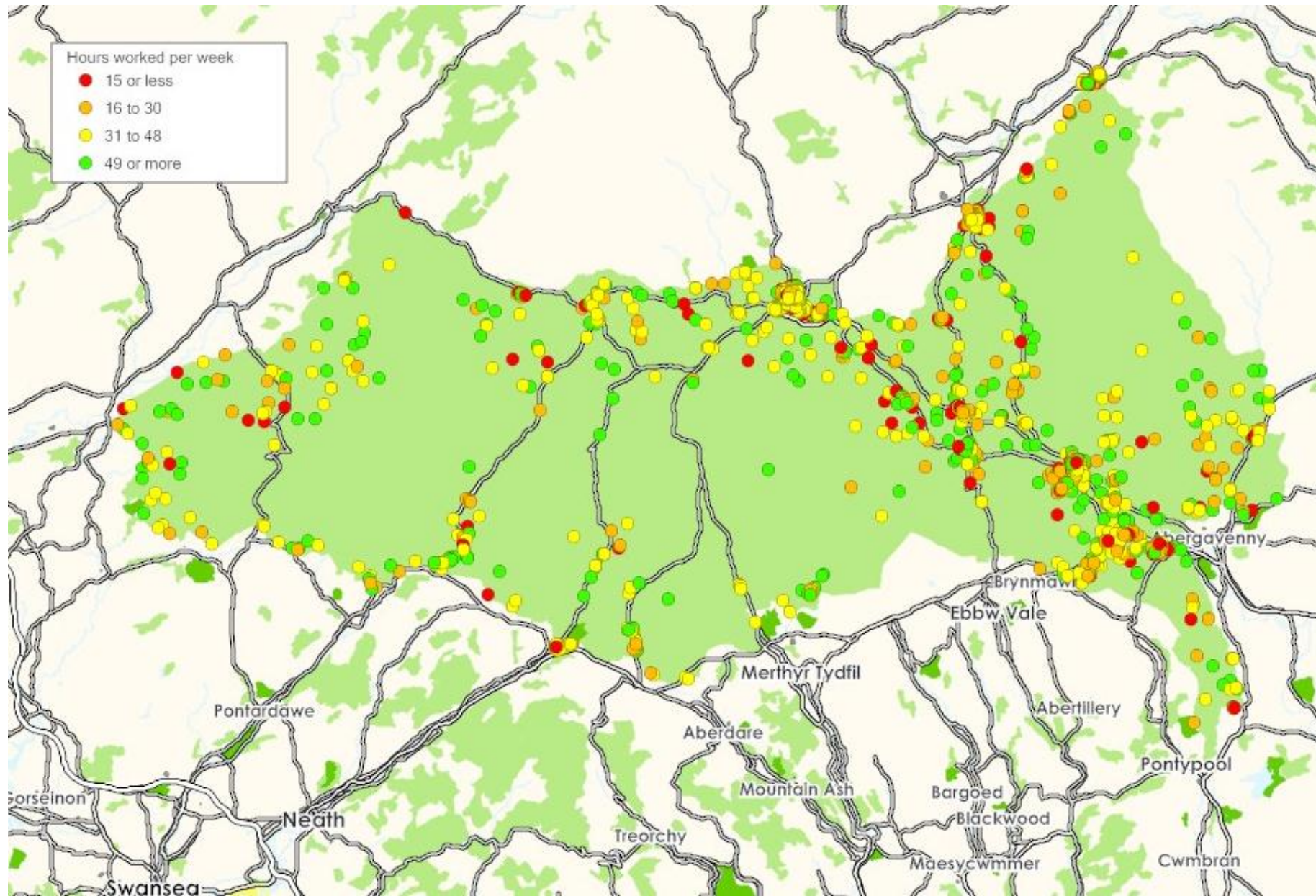


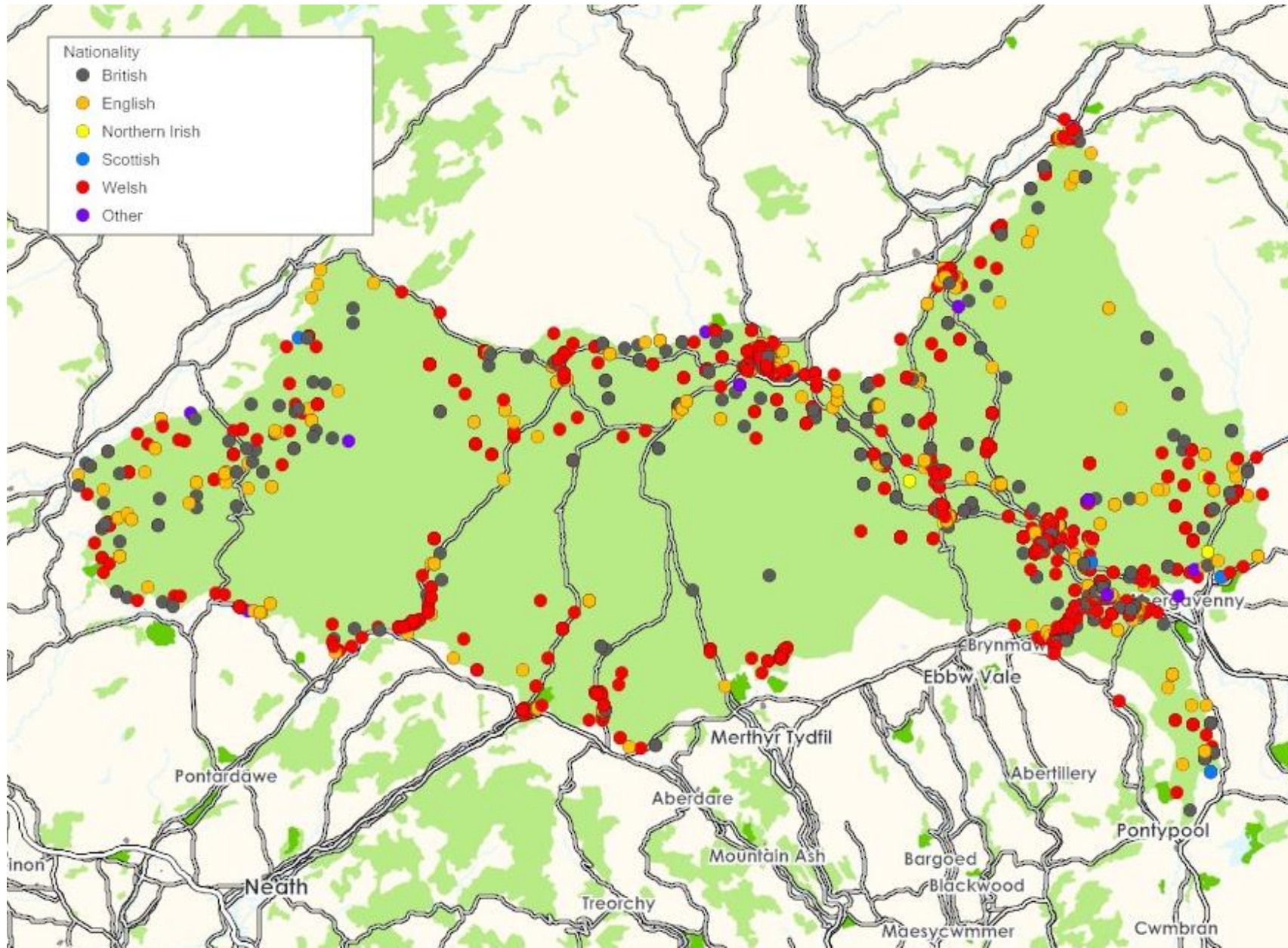


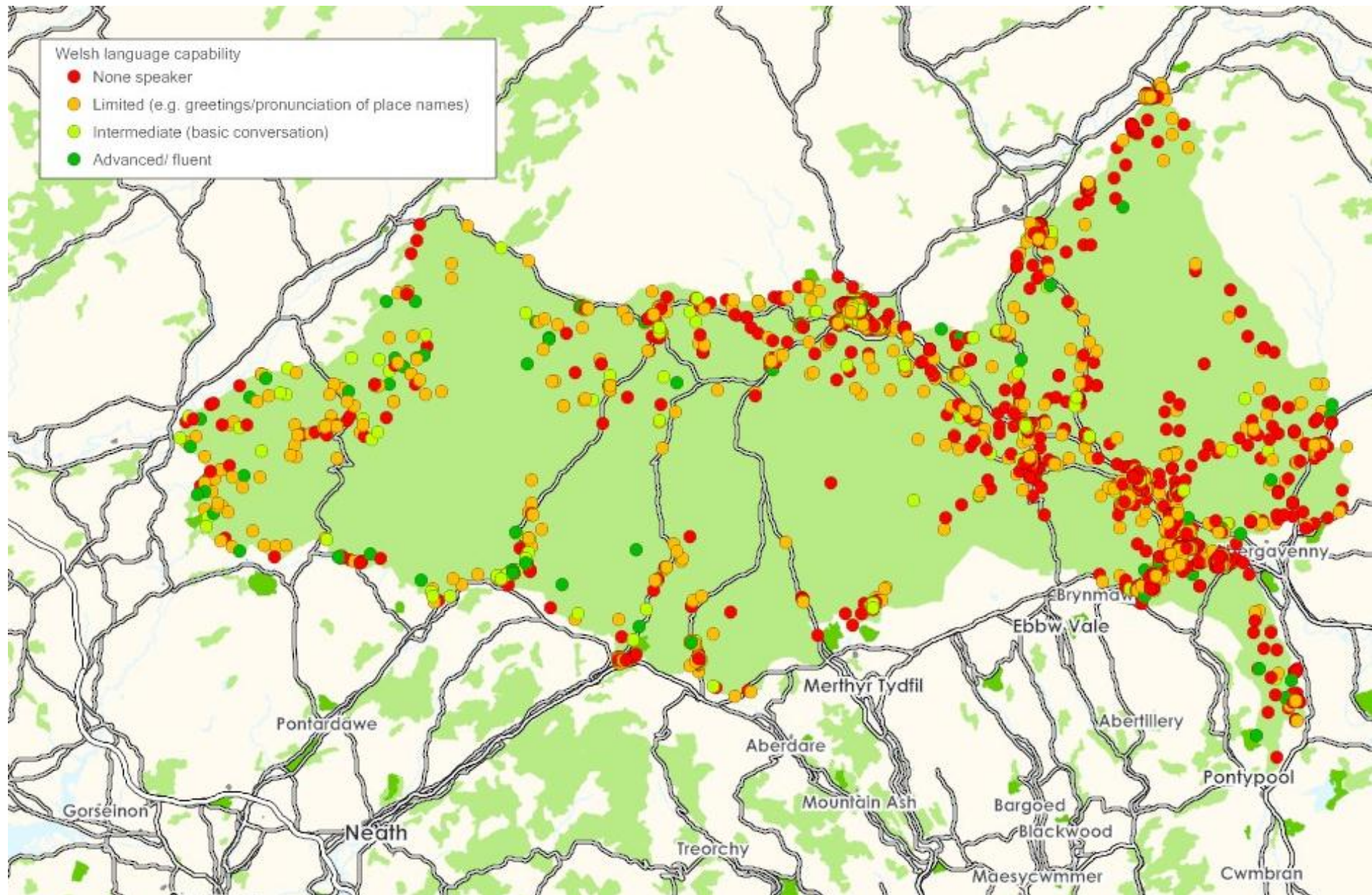










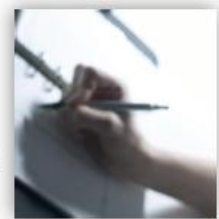


Appendices - Questionnaire

Using evidence to shape better services



Research



Public Consultation



Evaluation



Surveys



Consultancy Evaluation



Skillbuilding



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