NORTHUMBERLAND
COUNTY COUNCIL

Panel Consultation Report

On Behalf of Northumberland County Council

SMSR
social and market strategic research

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Report V01
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Contents Page

1.0 Introduction

Background

In May 2010 Northumberland County Council commissioned SMSR Ltd to recruit and manage a residents' panel on their behalf. The panel consists of 1,070 residents who were representative of the population of the Northumberland County. This consultation was the fourth to be done using the panel.

The panel has previously been used to undertake consultations on strategic priorities, communications and local services.

Northumberland County Council plans to consult with the panel twice each year; the next planned topic for consultation is as follows:

- **Autumn**: Access to services

Aims and Objectives

The objective of the consultation was to gather information on the health and lifestyle of local residents. The consultation will be used to inform future developments in the county relating to health and the local economy.

The main aims of the consultation were to:

- Gather information on residents' health
- Understand perceptions of the economic outlook and the effect it has had on the individuals expenditure
- Assess the employment of residents and the skills and qualifications they possessed
- Advise on future housing development
- Get a better understanding of transport choices
- Discover energy efficiency and renewable energy plans

Report Structure

Included in the report is a set of topline findings which provides quick reference to all the questions asked throughout the survey. In addition all questions have been analysed by location and demographic group and any significant differences in opinion across the demographic variables and area are commented on throughout the report.

It should be noted that when the results are discussed within the report, often percentages will be rounded up or down to the nearest one per cent. Therefore occasionally figures may add up to 101% or 99%.

2.0 Methodology

The consultation was undertaken using a questionnaire which was designed by SMSR Ltd in conjunction with officers at Northumberland County Council.

All panel members were sent a letter to explain the consultation subject, a copy of the questionnaire and the results of the previous consultation. A pre-paid envelope was also included so that residents could return their survey free of charge.

Residents were initially given a three week period in which to complete and return the survey. Respondents who had not returned their questionnaire were then sent a reminder letter and questionnaire, which gave them a further two weeks to complete and return a questionnaire.

In total of 536 completed surveys were returned – a 51% response rate.

The demographic and geographic split was as follows:

Area	Number of Responses	Percentage of responses
North	160	28%
South-East	227	40%
West	147	26%

Gender	Number of Responses	Percentage of responses
Male	252	45%
Female	282	50%

Age	Number of Responses	Percentage of responses
18-24	5	1%
25-39	53	9%
40-59	241	43%
60-79	206	37%
80+	28	5%

Disability	Number of Responses	Percentage of responses
Yes	67	12%
No	481	83%

When undertaking analysis all missing responses have been excluded, and results used take into account valid responses only. As a result of this, base numbers will vary for each question.

3.0 Summary

Health

Three quarters of respondents considered their current health to be at least good, with one in ten respondents rating their health as excellent. Respondents most frequently said that time (38%), motivation (29%) and cost (22%) prevented them from leading a healthier lifestyle.

A half of respondents considered their weight to be healthy however, 42% of respondents felt they were overweight and a further 4% said they were obese. Despite this almost three quarters (72%) of respondents said they were not worried about their weight and the majority (84%) said they had a healthy, well balanced diet. Almost three tenths (29%) of respondents had participated in moderate activity five or more times in the seven days prior to taking part in the consultation.

Less than a fifth (16%) of respondents used a public swimming pool in Northumberland, however, perception of Northumberland swimming pools tended to be good, 74% said the location of public swimming pools is good and more than three fifths said the cleanliness (64%), welcome (60%) and opening times (60%) were good).

Almost three quarters (72%) of respondents had consumed alcohol on at least one occasion in the seven days prior to taking part in the consultation, with alcohol consumption increasing considerably over the weekend. Although a high number of respondents had consumed alcohol, the majority of respondents had consumed a number of units that was within the government's recommended guidelines.

Three quarters of respondents felt good about themselves either all (8%) or most (67%) of the time; only 1% of respondents said that they never felt good about themselves.

Economic Outlook

Around half of the sample had a household income that was £30,000 or lower however, almost a tenth of respondents had a household income exceeding £60,000. Almost half (47%) of respondents lived in a household which consisted of two people; a fifth of respondents lived in a single person household.

Although only 5% of respondents thought the economic situation in Northumberland would have improved to some extent in a year's time, around a fifth (21%) of respondents felt that in 5 years' time the economic situation in the county would be either a lot or slightly better than it is currently.

Around two thirds (65%) of respondents said that the economic situation of the town they most frequently visited for shopping had become worse since the previous year, and 58% said the situation would be worse in a year's time. In order to improve the town's economy almost two thirds of respondents said a more diverse range of shopping outlets (64%) was needed.

More than a tenth (15%) of respondents said their financial situation was better than it had been a year ago and a similar proportion (11%) felt their financial situation would improve in a year's time.

Almost half (45%) of respondents had reduced their household spending over the previous year; however 16% of respondents reported an increase in their household spending. Expenditure on energy and utilities (56%), transport (49%) and food and drink (47%) had increased significantly; the greatest decreases in spending were in eating out and entertainment (77%), holidays (69%), local attractions and cultural activities (69%) and recreation, leisure and sport (57%).

Employment emerged as the economic issue which was considered to be most problematic for the Northumberland region as a whole, with increased household bills (16%) and rising petrol prices (11%) also frequently selected as important economic issues in the Northumberland area.

More than half (55%) of respondents considered public services to be the strongest sector within Northumberland and 31% said that this was the sector which needed the most encouragement. Retail (42%), agriculture, forestry and fishing (40%) and tourism and recreation (39%) were also considered by many to be strong sectors within Northumberland.

Employment

Around half (45%) of respondents were in paid employment and more than two thirds (69%) of those in employment worked in Northumberland. More than two fifths (44%) of respondents were employed in the public sector, 33% of respondents worked in the private sector and 18% were self-employed.

Around a tenth (11%) of respondents were seeking new employment opportunities however, two thirds of respondents said if they wanted to obtain new employment, their chances of doing so would be either poor or very poor.

Almost three fifths (58%) of respondents were confident that they had the appropriate skills required to find new employment opportunities and 61% of respondents knew where to go to access suitable training to find employment.

Around two thirds (65%) of respondents would be willing to work in tourism services, attractions and accommodation in the future; willingness to work in the creative industries was also high (45%). More than two fifths (44%) of respondents said that being employed was more important to them than the sector which they work in, and 9% of respondents anticipated that they would be employed in a different sector in five years' time.

Opinion was divided on the type of employer which appealed to respondents as 43% indicated a preference for a large employer with stability and opportunities for career progression whereas 28% said they wanted to run / work for a small organisation that was close to the user / customer.

Future Development to Support Economic Growth

The most popular approach for any new housing development was for the development to be at a scale which complements the existing settlement pattern and sizes (56%) and three quarters of respondents said it was very important that new developments were of a high design, maintaining and enhancing the local character and distinctiveness of the county.

When selecting a location to live, three tenths of respondents said that good transport links were important to them. Health and social care provision (25%) and educational facilities (20%) were also important factors when choosing where to live.

Around half (51%) of respondents agreed that council planning policies should set a target number of pitches / plots to meet the identified needs of travellers, and almost all (96%) of those who said a target should be set agreed that the land should be specifically identified and allocated.

Around four fifths (81%) of respondents said that new housing development should be specifically designed to meet the needs of older people.

Transport and Sustainable Development

Walking or using a car / motorcycle were the two most popular modes of transport among respondents.

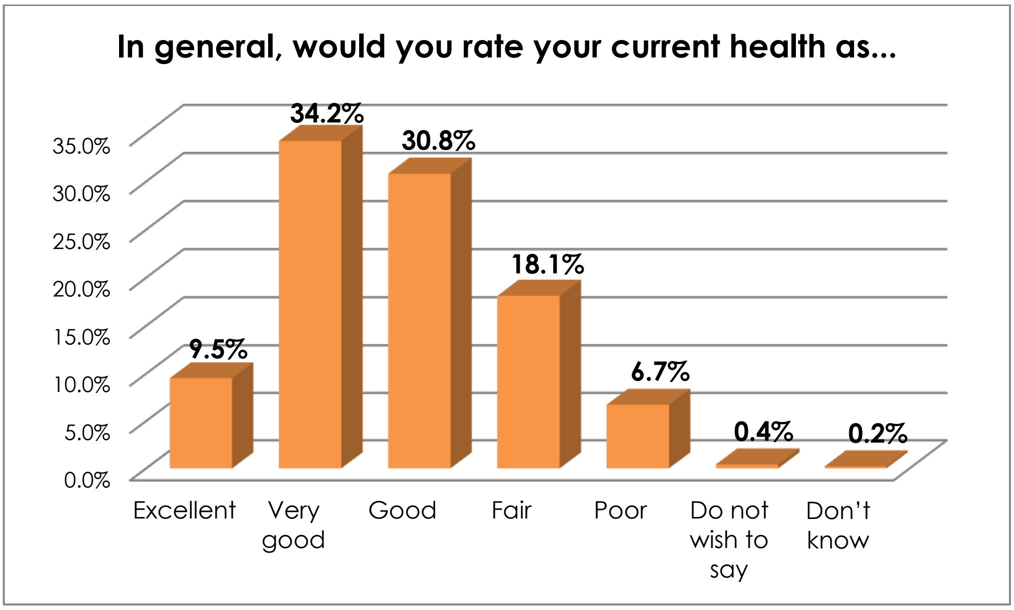
When considering sustainable modes of transport, respondents tended to be deterred from walking (55%) or using a pedal cycle (41%) by poor weather conditions. Respondents also reported that the bus (42%), metro / train (55%) and community transport (54%) services which were currently offered were not suited to their needs.

More than four fifths of respondents said that if they were to buy a new house, energy efficiency is something that would be important. Almost two thirds (65%) of respondents had no plans for energy efficiency improvements within the following year, and a similar amount did not plan to install renewable energy technologies to their property in the following year.

4.0 Findings

4.1 Health

4.1.1 Current Health



Three quarters of respondents considered their current health to be at least good, with one in ten respondents rating their health as excellent. Only 7% of respondents felt their current health was poor.

Good health tended to decrease with age, as 91% of respondents aged 18 to 39 rated their health to be at least good compared with 66% of respondents aged 60 and over.

More than four fifths (82%) of respondents who did not have a disability felt their health was good, very good or excellent; this was significantly higher than respondents with a disability (22%).

Almost nine tenths (86%) of respondents living in West Northumberland rated their health as good, very good or excellent; this was around one tenth higher than those living in the North (77%) and two tenths higher than those in the South East (65%).

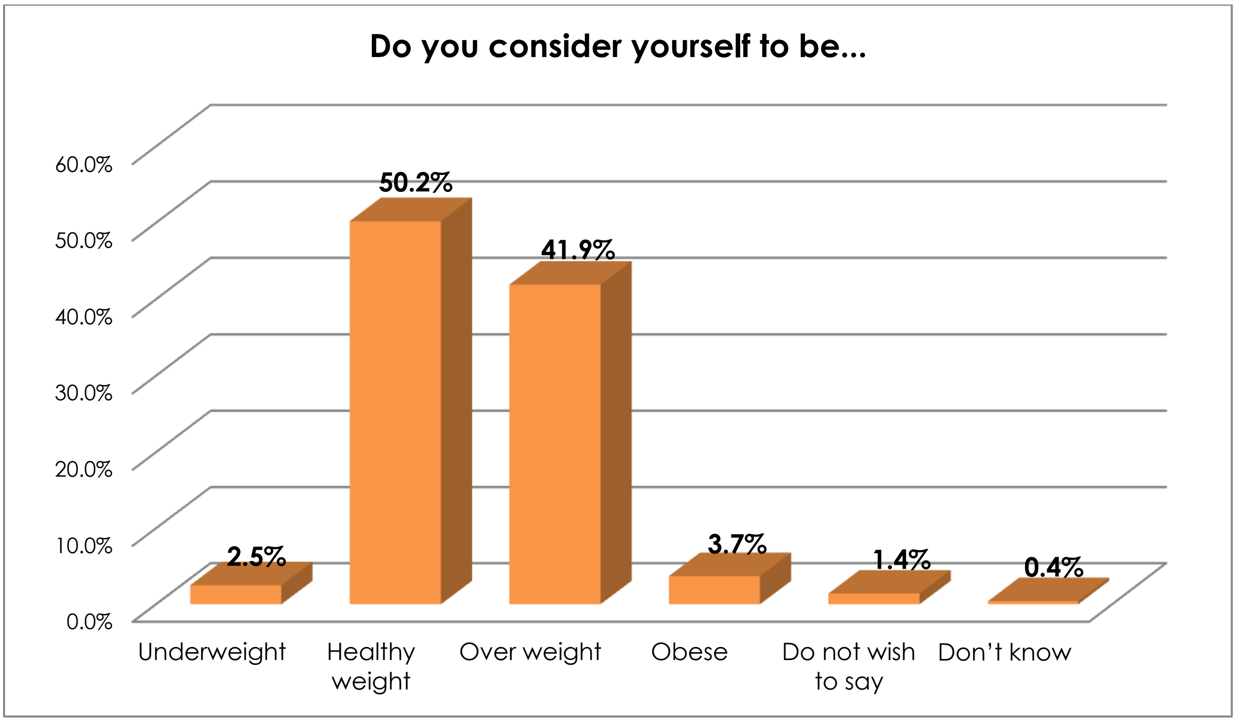
Why did you give this response? (Excellent, Very Good, Good, Fair)		
Response	**Number**	**Percentage**
I am a non-smoker	401	81.3
I eat a healthy diet	385	78.1
I have a balanced lifestyle – everything in moderation	340	69.0
I take regular weekly exercise	313	63.5
I sleep well	256	51.9
I am not overweight	224	45.4
Don't know	6	1.2
Do not wish to say	3	0.6
Other	26	5.3

Respondents who rated their health as excellent, very good or good were asked to give reasons why they had expressed this view. Around four fifths of respondents had said their health was at least good as they were a non-smoker (81%) or as they ate a healthy diet (78%). Good health was also frequently attributed to having a balanced lifestyle (69%) and taking regular weekly exercise (64%).

Why did you give this response? (Poor)		
Response	**Number**	**Percentage**
I have mobility issues	22	61.1
I have poor sleep patterns	18	50.0
I am disabled	14	38.9
I smoke	8	22.2
I do not have time to exercise regularly	5	13.9
I cannot afford to exercise regularly	2	5.6
Don't know	0	0.0
Do not wish to say	2	5.6
Other	10	27.8

Around three fifths (61%) of respondents said their health was poor as they had mobility issues; a half of respondents had poor health because of their sleep patterns. Few respondents considered their health to be poor due to a lack of regular exercise (either because they did not have the time (14%) or could not afford to do so (6%).

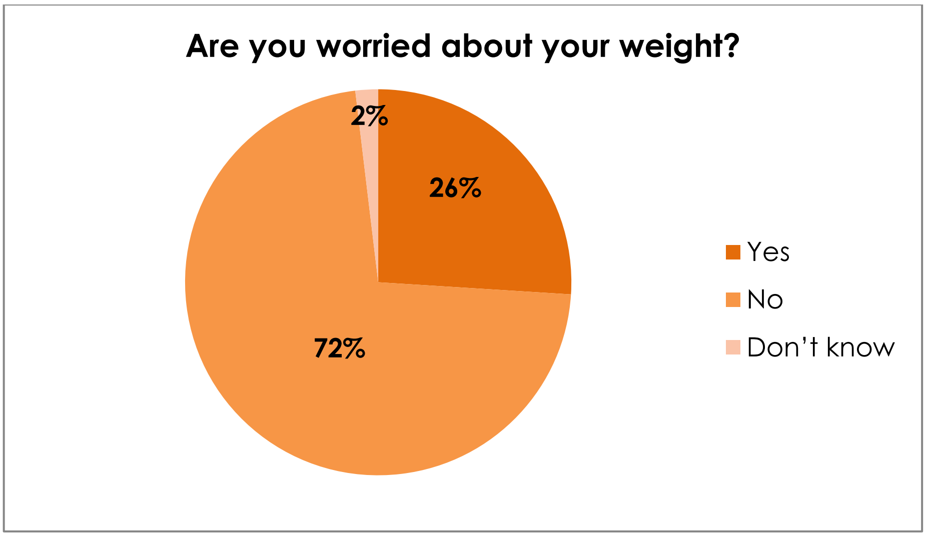
4.1.2 Weight



A half of respondents considered their weight to be healthy however, 42% of respondents felt they were overweight and a further 4% said they were obese. Just over 2% of respondents described themselves as underweight.

Females (48%) were less likely than males (52%) to say they were a healthy weight; females were slightly more likely to say they were either overweight (+3%) or obese (+2%).

Respondents living in the South East most frequently said they were overweight (47%) or obese (3%); those living in the West were most likely to say they were a healthy weight (55%).

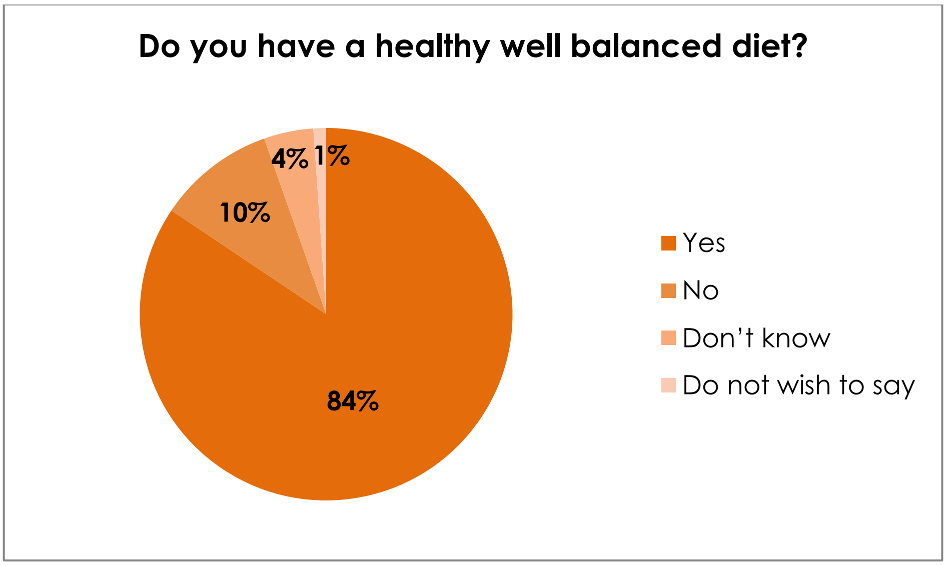


Almost three quarters (72%) of respondents said they were not worried about their weight. Although in the previous question around half of respondents did not describe their weight as 'healthy', only a quarter (26%) of respondents said their weight was something which concerned them.

Three tenths of female respondents were concerned about their weight; this concern was 8% higher than concern among male respondents.

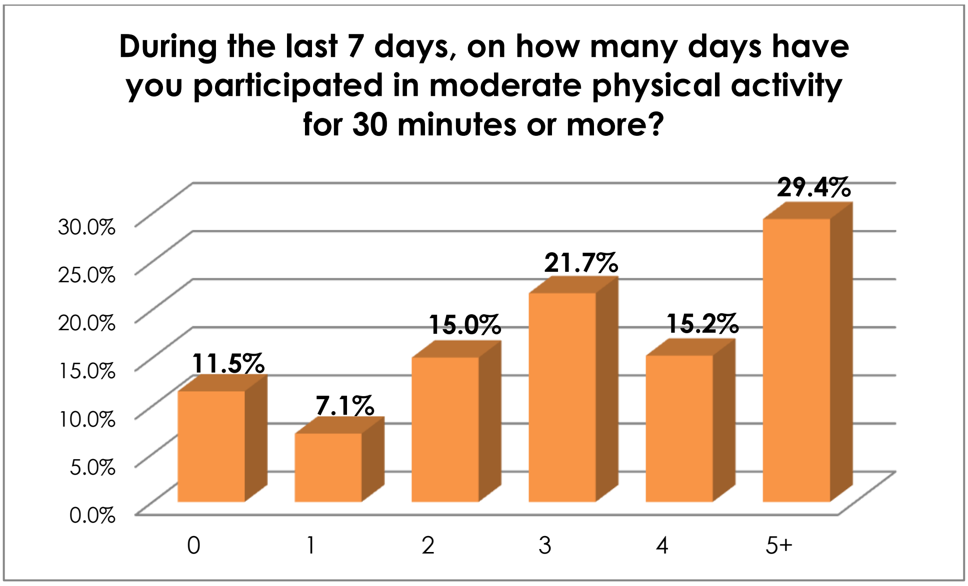
Younger respondents (29% of those aged 18 to 39) most frequently said they were worried about their weight; respondents aged 60 and over expressed concern less frequently (25%).

4.1.3 Diet



The majority of respondents (84%) said they had a healthy, well balanced diet, meaning only a tenth of respondents said that they did not. Respondents living in West Northumberland (89%) most frequently described their diet as healthy; fewer respondents living in the South East (81%) said that this was the case.

4.1.4 Exercise



Respondents were asked how frequently they had undertaken moderate exercise lasting 30 minutes or more in the seven days prior to taking part in the consultation. Although 12% of respondents said they had not done any moderate exercise, almost three tenths (29%) of respondents had participated in moderate activity five or more times in the seven days considered.

Male respondents were most likely to say they had done moderate activity on five or more occasions (31%, 3% higher than female respondents) however, doing no moderate activity was higher among male respondents (15%, 7% higher than female respondents).

Respondents aged 40 to 59 had exercised most frequently, with 31% saying they had undertaken moderate physical activity five or more times in the seven days considered; respondents aged 18 to 39 (21%) were least likely to have participated in this type of activity five or more times.

Around a third (34%) of respondents with a disability had not undertaken any moderate physical activity; only 8% of respondents who did not have a disability had not taken part in moderate physical activity.

The amount of moderate physical activity undertaken varied little by area; however slightly fewer respondents living in the South East had participated in this type of activity five or more times in the seven days prior to taking part in the consultation (25%).

4.1.5 Swimming Facilities

Less than a fifth (16%) of respondents used a public swimming pool in Northumberland, with swimming pool use being particularly low in the North area (10%).

Use of a public swimming pool was significantly higher among respondents aged 18 to 39 (41%) however, only one in ten respondents aged 60 and over used the public swimming facilities.

Which public swimming pool in Northumberland do you use?		
Location	**Number**	**Percentage**
Cramlington	23	26.7
Blyth	19	22.1
Hexham	17	19.8
Prudhoe	16	18.6
Ashington	13	15.1
Morpeth	11	12.8
Alnwick	3	3.5
Ponteland	3	3.5
Berwick	2	2.3
Haltwhistle	1	1.2
Rothbury	0	0.0

Respondents who did use a public swimming pool were asked to specify which of the Northumberland pools they used. Among the 86 respondents who used a public swimming pool, the most frequently used were Cramlington (27%), Blyth (22%), Hexham (20%) and Prudhoe (19%).

What is your impression of public swimming pools in Northumberland?						
Aspect of local swimming pool	**Net good (%)**	**Very good (%)**	**Good (%)**	**Average (%)**	**Poor (%)**	**Very poor (%)**
Location	**73.6**	18.2	55.4	20.1	5.4	1.0
Cleanliness	**63.9**	14.8	49.1	29.6	5.5	1.0
Welcome	**59.7**	15.7	44.0	32.1	8.2	0.0
Opening times	**59.5**	10.8	48.7	34.9	4.8	0.7
Quality	**52.4**	9.9	42.5	36.3	9.5	1.8
Value for money	**48.3**	7.8	40.5	40.1	8.9	2.6

Almost three quarters (74%) of respondents said the location of public swimming pools in Northumberland was good; ratings of good increased to 81% among service users. Only 6% of respondents rated this aspect of public swimming pools as either poor or very poor.

Around three fifths of respondents said their impression of the cleanliness (64%), welcome (60%) and opening times (60%) of public swimming pools was either very good or good.

Around half of respondents rated the quality (52%) and value for money (48%) as good / very good however, around a tenth of respondents rated these aspects as either poor or very poor (11% and 12% respectively). Service users were significantly more positive about these aspects, with 66% rating the value for money as good and 59% saying that the swimming pools were of good quality.

How important are the following aspects when you are using a pool?						
Aspect of local swimming pool	**Net important (%)**	**Very important (%)**	**Fairly important (%)**	**Average (%)**	**Not very important (%)**	**Not important at all (%)**
Cleanliness	**99.3**	91.1	8.2	0.5	0.0	0.3
Quality	**96.7**	66.0	30.7	3.0	0.0	0.3
Opening times	**92.8**	49.9	42.9	6.4	0.5	0.3
Location	**90.9**	44.9	46.0	7.7	0.8	0.5
Value for money	**90.9**	57.6	33.3	7.5	1.3	0.3
Welcome	**78.0**	27.7	50.3	18.5	2.7	0.8

Respondents were then asked to consider the statements again but this time state the importance of each. Almost all respondents said that cleanliness was important, with 91% saying it was something which was very important. More than nine tenths of respondents also said that quality (97%), opening times (93%), location (91%) and value for money (91%) were important to them.

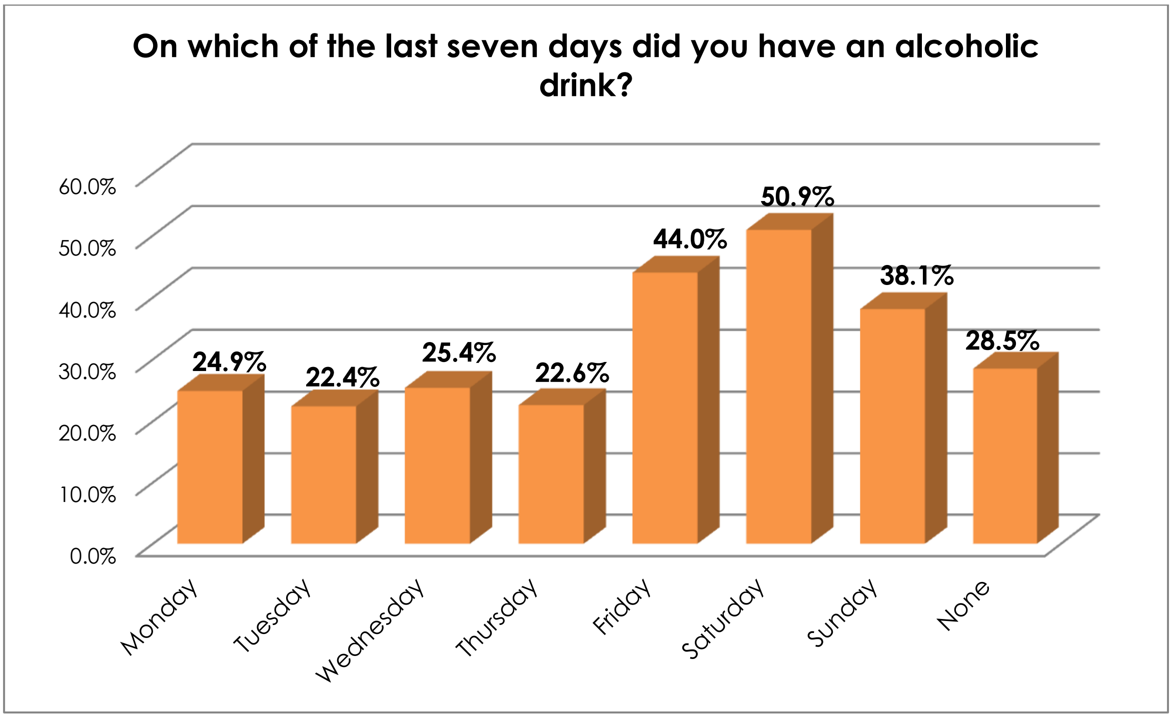
Although fewer respondents said that welcome was important when using a swimming pool, 78% did say that this was important and only 4% of respondents said this was either not very important or not important at all.

For all of the aspects listed no more than 4% of respondents said it was something they considered to be either not very important or not important at all.

	Northumberland pools (very good / good)	**Importance (very / fairly important)**	**Difference**
Location	73.6	90.9	-17.3
Welcome	59.7	78.0	-18.3
Opening times	59.5	92.8	-33.3
Cleanliness	63.9	99.3	-35.4
Value for money	48.3	90.9	-42.6
Quality	52.4	96.7	-44.3

When perception and importance are compared, respondent opinion differed to the greatest extent when quality (44% difference) and value for money (43% difference) were considered.

4.1.6 Alcohol



When considering the seven days prior to taking part in the consultation, 72% of respondents had consumed alcohol on at least one occasion.

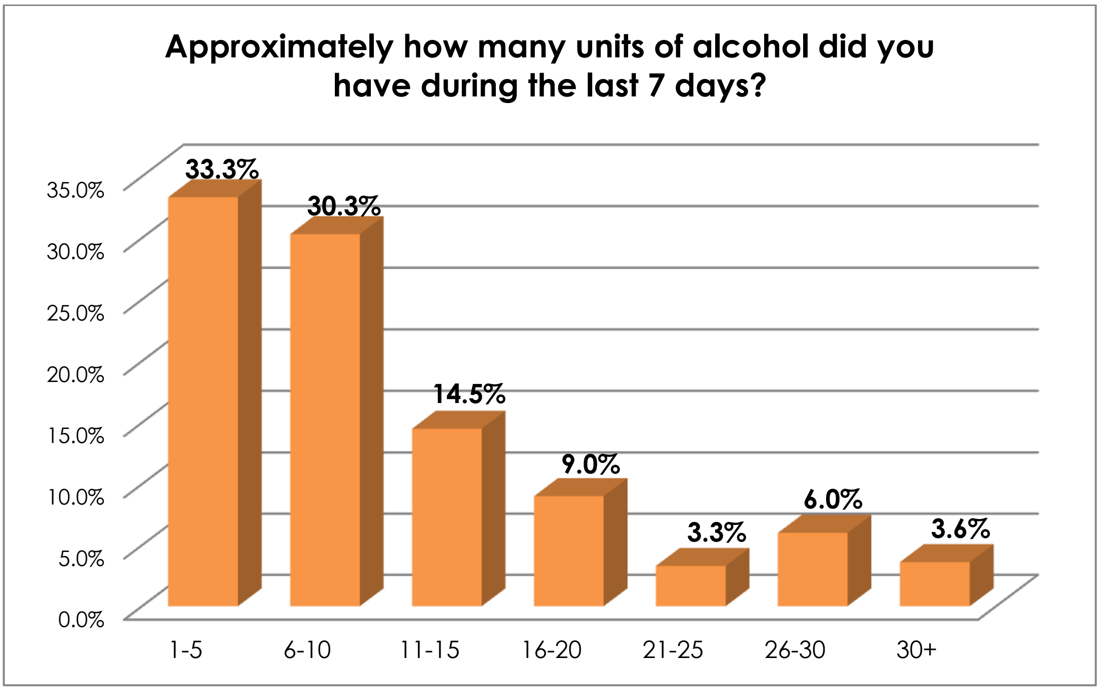
Alcohol consumption increased considerably over the weekend[1], most specifically on a Saturday when more than half (51%) of respondents had an alcoholic beverage. From Monday to Thursday the number of respondents who consumed alcohol varied between 22% (Tuesday) and 25% (Wednesday).

Each day there were more male respondents who consumed alcohol, with the differences to female respondents varying between +10% on a Saturday to +21% on a Sunday. The number of male respondents who consumed alcohol on a weekend was around 20% higher than the number who drank during the week. Although the number of females who drank alcohol on a Friday was around 20% higher than the number who drank during the week, the increase was most significant when comparing weekdays to Saturdays (approximately +30%).

More than three quarters (77%) of respondents aged 40 to 59 had consumed alcohol on at least one occasion in the seven days prior to taking part in the consultation; this was 5% higher than the number of respondents aged 60 and over and 8% higher than the number aged 18 to 39. Respondents aged 60 to 79 were the most likely to consume alcohol on weekdays (particularly Wednesday (36%), whereas alcohol consumption was highest among those aged 40 to 59 on Friday and Saturday.

On six of the seven days alcohol consumption was highest in West Northumberland and lowest among those living in the South East.

[1] When making comparisons Monday to Thursday has been grouped as 'weekday' and Friday to Sunday has been categorised as 'weekend'

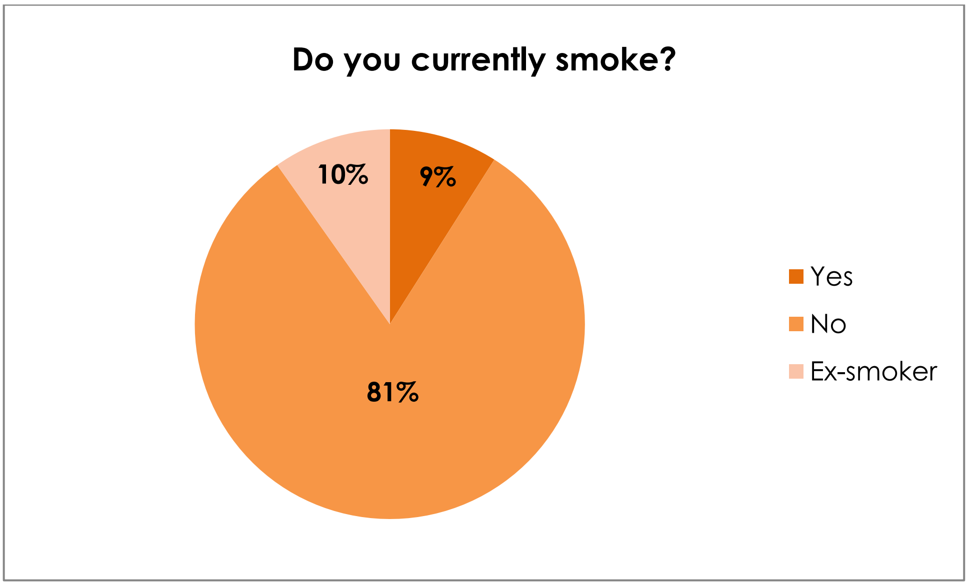


A third of respondents had consumed between one and five units of alcohol during the seven days prior to completing the questionnaire, and a further 30% of respondents approximated that they had consumed six to ten units. Few respondents had consumed in excess of twenty-five units of alcohol over the seven days prior to the consultation (26 to 30: 6%, 30+: 4%).

Overall female respondents consumed fewer units than their male counterparts, with 51% of females consuming between one and five units compared with 20% of males. Almost a fifth (16%) of male respondents consumed more than twenty-five units of alcohol over the seven days, 15% higher than this level of consumption among female respondents.

In addition to being the area where respondents consumed alcohol most regularly, respondents living in West Northumberland also consumed the greatest number of units. Respondents living in the North area consumed the fewest units, with 40% of respondents in this area having between one and five units.

4.1.7 Smoking



The majority (81%) of respondents did not smoke. Around a tenth (9%) of respondents were current smokers and a further tenth were ex-smokers.

More than a tenth (11%) of female respondents were smokers; this is slightly higher than the percentage of male respondents who smoked (7%).

There was a higher proportion of smokers among respondents aged 18 to 39 (14%), whereas respondents aged 40 to 59 most frequently said they did not smoke (85%).

Smoking was slightly higher among respondents who lived in the South East (11%); the greatest percentage of ex-smokers lived in the West (12%) and the highest ratio of non-smokers was in the North (85%).

Among the 47 respondents who did smoke, 81% (38 respondents) had tried to stop in the past.

4.1.8 Barriers to a Healthy Lifestyle

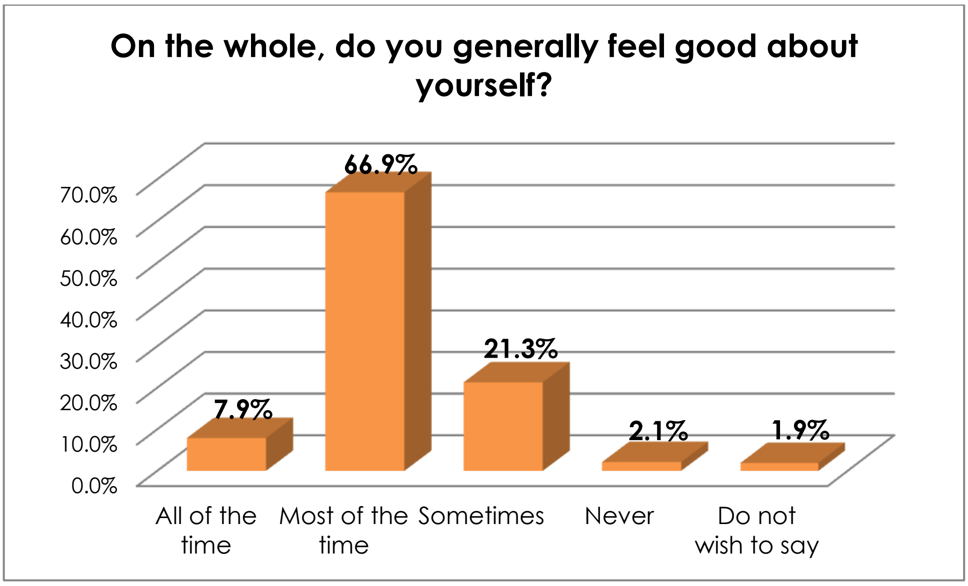
What factors prevent you from leading a healthier lifestyle?		
Barrier	**Number**	**Percentage**
Time	188	38.3
Motivation	140	28.5
No limiting factors	117	23.8
Cost	107	21.8
Health	98	20.0
Caring commitments	54	11.0
Access	36	7.3
Lack of information	17	3.5
Other	28	5.7

Respondents were asked what factors, if any, prevented them from leading a healthier lifestyle. Time was the factor which was most frequently selected as a constraining factor (38%); for many respondents motivation (29%) and costs (22%) also restricted them from leading a healthier lifestyle. Almost a quarter (24%) of respondents said there were no factors which prevented them from leading a healthier lifestyle.

Time (71%) and cost (38%) were factors which particularly influenced respondents aged 18 to 39 from leading a healthier lifestyle. A lack of motivation was most frequently identified as an issue by respondents aged 40 to 59 (33%).

Around a third (32%) of respondents aged 60 and over said there were no factors preventing them from living a healthier lifestyle; a similar proportion of male respondents also said that this was the case (31%).

4.1.9 Personal Feelings



Almost a tenth (8%) of respondents said that on the whole they felt good about themselves all of the time, a further 67% of respondents felt good most of the time and 21% said that generally they feel good about themselves some of the time. Only 1% of respondents said that they never felt good about themselves.

Around four fifths (79%) of respondents who did not have a disability felt good about themselves all or most of the time, this opinion was 36% lower among respondents who did have a disability.

Feeling good was higher among respondents living in the West, as 85% of respondents in this area said they felt good about themselves either all or most of the time. Fewer respondents living in the South East said they felt good about themselves either all or most of the time (67%).

Please explain your answer		
Response	**Number**	**Percentage**
Feel good / happy / take care of myself	52	24.3
Ill health / medical issues	31	14.5
Everyone has an off day / good and bad days	27	12.6
Healthy / fit	21	9.8
Weight issue	17	7.9

Respondents were asked to give reasons for their level of feeling good about themselves. Almost a quarter (24%) of respondents said that they generally felt good or were happy / took care of themselves. Reasons which prevented respondents from feeling good all of the time included ill health / medical issues (15%) and everyone having off days / good and bad days (13%).

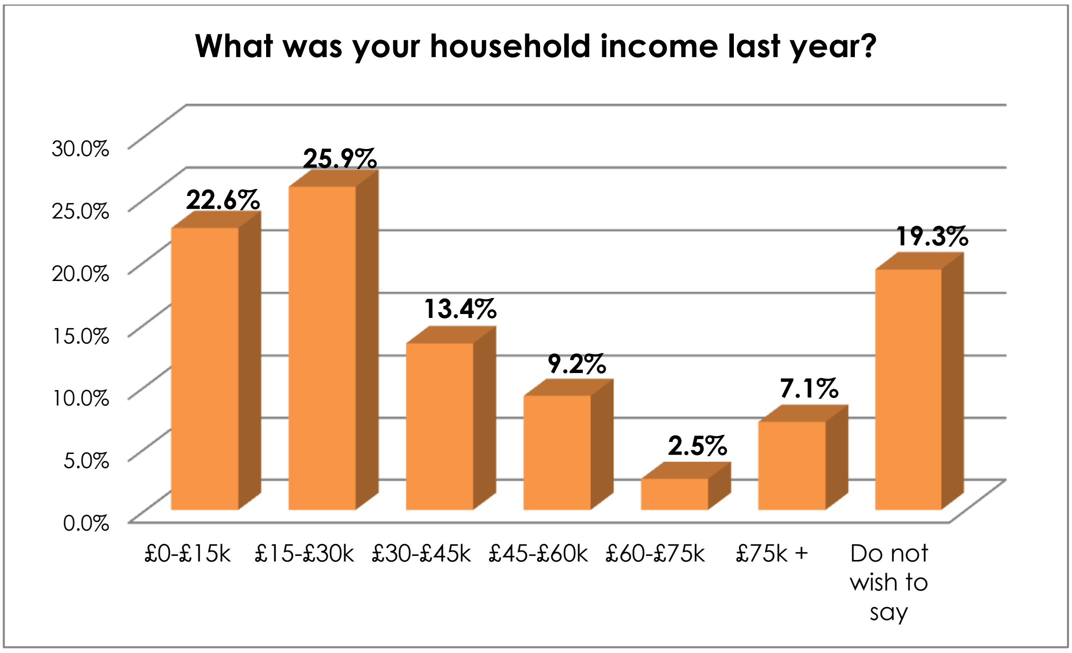
4.1.10 Health and Social Care Information

Where would you go to access health and social care information?		
Location	**Number**	**Percentage**
GP surgery	433	82.5
Internet	275	52.4
Family / friends	177	33.7
NHS Choices	75	14.3
Library	73	13.9
Social Services	65	12.4
Local council	50	9.5
CAB	28	5.3
Local support groups	20	3.8
LINk	4	0.8
Other	8	1.5

If respondents wanted to access health and social care information, the majority (83%) would visit their GP surgery. More than half (52%) of respondents said they would look online for this type of information, and around a third (34%) would consult with family / friends.

4.2 Economic Outlook

4.2.1 Household Income



Around half of the sample had a household income that was £30,000 or lower, (23% had a household income of £15,000 or lower and 26% had an income of between £15,000 and £30,000). Around a tenth of respondents had a household income exceeding £60,000.

The highest household incomes tended to be among respondents aged 40 to 59; of the 54 respondents who had a household income of £60,000 or greater, 68% were in this age group. Less than a fifth (16%) of respondents aged 40 to 59 had a household income that was below £15,000, 9% lower than the percentage of respondents aged 18 to 39 and 13% lower than the proportion of respondents aged 60 and over.

Household income varied between areas, with around three tenths (31%) of respondents living in the South East having a household income of £15,000 or below compared with 18% of respondents living in the North and 15% of those living in the West. Only 4% of respondents living in the South East had a household income which was greater than £60,000.

4.2.2 Changes in Financial Situation

Question	Net better (%)	A lot better (%)	Slightly better (%)	The same (%)	Slightly worse (%)	A lot worse (%)
In 5 years, do you think the overall economic situation in Northumberland will be…	**21.4**	2.1	19.3	21.5	33.6	23.4
Compared to a year ago, is your financial situation…	**14.5**	1.7	12.8	36.0	41.1	8.5
In a year's time, do you think your household financial situation will be…	**11.3**	2.3	9.0	41.8	34.2	12.7
In a year's time, do you think the overall economic situation in Northumberland will be…	**5.4**	0.0	5.4	25.1	48.5	21.0

Although only 5% of respondents thought the economic situation in Northumberland would have improved to some extent in a year's time, around a fifth (21%) of respondents felt that in 5 years' time the economic situation in the county would be either a lot or slightly better than it is currently.

More than a tenth (15%) of respondents said their financial situation was better than it had been a year ago, and a similar proportion (11%) felt their financial situation would improve in a year's time. Despite this a half of respondents said their financial situation had worsened over the previous year and 47% felt it would worsen over the coming year.

Personal Financial Situation

Although there was little difference between gender when comparing the financial situation retrospectively, when considering the future 52% of male respondents said their financial situation would be worse in a year's time compared with 42% of female respondents.

The perception that the financial situation was better than it had been previously tended to decrease with age with around a quarter (24%) of respondents aged 18 to 39 saying their situation was better than it had been a year ago compared with 11% of respondents aged 60 and over. This pattern was replicated when respondents were asked if they felt their financial situation would be better in a year's time (23% 18 to 39, 6% 60 and over).

Respondents who did not have a disability were more likely than those who did to say that their financial situation was both better than it had been a year ago (+6%) and would have improved in a year's time (+10%).

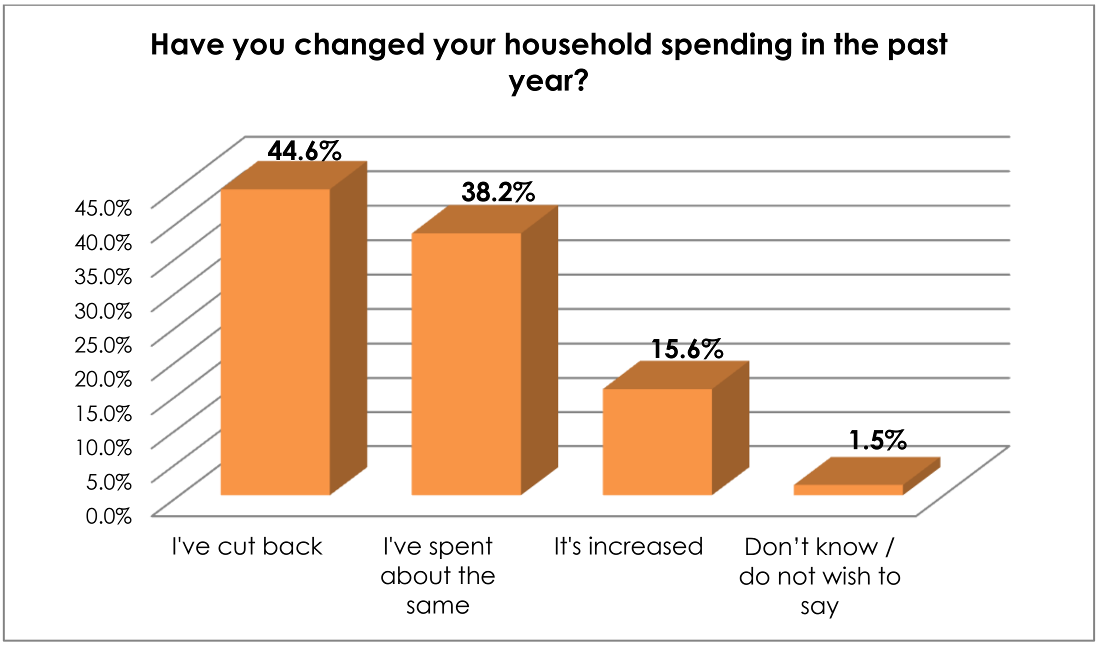
Respondents living in the West most frequently said their financial situation had improved (18%) and would be better in a year's time (15%). Respondents living in the South East (54%) most frequently said their financial situation was worse than it had been, while those living in the North (50%) were most likely to say their situation would be worse in a year's time.

Economic Situation of Northumberland

Almost three quarters (73%) of male respondents felt the economic situation of Northumberland would be worse in a year's time, 6% higher than female respondents who expressed this opinion. Contrary to this, female respondents most frequently said the economic situation of Northumberland would be worse in five years' time (61% females, 53% males).

Respondents living in the West were more positive about the economic situation of Northumberland, with 8% saying the economic situation would improve in a year's time and 24% saying it would be better in five years' time. Respondents living in the South East most frequently said that the economic situation would be either slightly or a lot worse in both a year's time (72%) and in five years' time (62%).

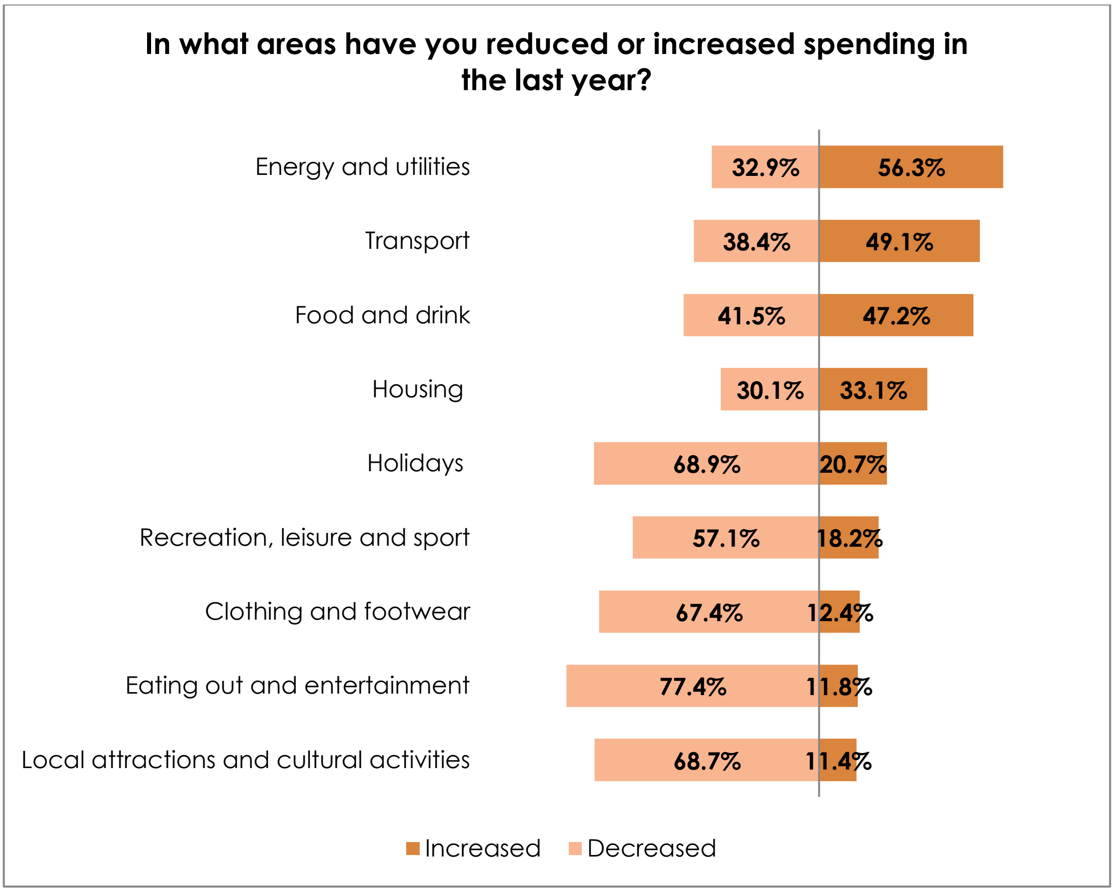
4.2.3 Household Spending



Almost half (45%) of respondents had reduced their household spending over the previous year; however 16% of respondents reported an increase in their household spending. Almost two fifths (38%) of respondents said that their household spending had stayed the same over the past year.

Female respondents (49%) were almost a tenth more likely than male respondents (40%) to say that they had cut back on their household spending over the previous year. Respondents aged 18 to 39 (62%) were also significantly more likely to say their household spending had reduced.

Respondents living in the South East (51%) most frequently said they had cut back on their household spending; those living in the West were most likely to say their household spending had remained the same (46%).



Respondents were asked to specify what elements of their spending had increased and which had decreased over the previous year. There had been significant increases in things which could be considered to be necessities: energy and utilities (56%), transport (49%) and food and drink (47%). Consequently the greatest decreases in spending were in areas such as eating out and entertainment (77%), holidays (69%), local attractions and cultural activities (69%) and recreation, leisure and sport (57%).

When considering all areas (aside from housing), male respondents most frequently said that their spending had increased; for all areas female respondents were most likely to say that they had decreased their spending in the past year.

For the majority of the items listed, respondents living in the West most frequently said that their spending had increased over the past year, while those living in the South East most frequently identified a decrease in their spending.

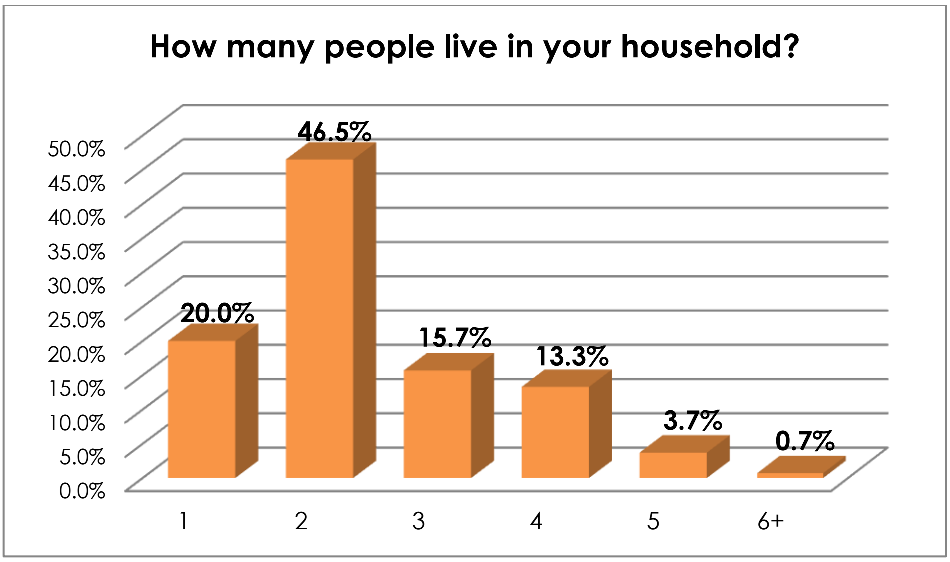
4.2.4 Economic Issues

In your opinion what are the biggest economic issues affecting the whole of Northumberland? (Option 1, most important)		
Economic Issue	**Option 1 (%)**	**Top 3 (1, 2 or 3) (%)**
Lack of jobs	**24.3**	48.0
Rising petrol prices	**10.6**	42.2
Increased household bills	**16.4**	40.4
Rising unemployment	**7.9**	33.5
Rising unemployment of young people	**9.2**	32.5
Loss of jobs in the public sector i.e. council, NHS	**9.2**	24.5
Effects of the Euro-zone crisis	**9.0**	16.4
No increase in wages	**4.5**	16.4
Level of household debt	**1.6**	11.9
Tax increases	**1.3**	8.7
Falling house prices	**0.5**	8.7
Cost of college / university education	**2.1**	5.5
Having appropriate skills for jobs available	**0.8**	5.3
Increasing responsibility of carers	**1.8**	4.5
Other	**0.8**	1.3

Employment emerged as the economic issue which was considered to be most problematic for the Northumberland region as a whole: around a quarter (24%) of respondents felt that a lack of jobs was the biggest economic issue, 9% thought that it was a loss of jobs in the public sector, 9% said it was rising unemployment in young people and 8% considered it to be rising unemployment in general. Around half (48%) of respondents selected a lack of jobs as either the first, second or third most important issue for the Northumberland area.

Increased household bills (16% option 1, 40% option 1, 2 or 3) and rising petrol prices (11%, 42% option 1, 2 or 3) were also frequently selected as important economic issues in the Northumberland area.

4.2.5 Composition of the Household



Almost half (47%) of respondents lived in a household which consisted of two people; a fifth of respondents lived in a single person household. Few respondents lived in a household which was made up of either 5 (4%) or 6 (1%) people.

Respondents living in the North most frequently said they either lived alone (24%) or in a two person household (48%). Households in the West were most likely to consist of 5 or more people (8%), whereas just 2% of respondents in the North said their household was made up of this many residents.

4.2.6 Shopping Towns

Which of the following towns do you most often visit to do your shopping?					
Town	**Number**	**Percentage**	**Town**	**Number**	**Percentage**
Ashington	92	17.9	Berwick-upon-Tweed	23	4.5
Hexham	86	16.7	Alnwick	21	4.1
Cramlington	75	14.6	Ponteland	20	3.9
Morpeth	65	12.6	Bedlington	12	2.3
Blyth	59	11.5	Amble	5	1.0
Prudhoe	27	5.2	Haltwhistle	5	1.0

Ashington (18%), Hexham (17%) and Cramlington (15%) were the towns which respondents most frequently visited for shopping purposes; Morpeth (13%) and Blyth (12%) were also visited by more than a tenth of respondents.

Perhaps unsurprisingly the town visited was greatly influenced by the area the respondent were based; half of respondents living in the West visited Hexham, 32% of those living in the North visited Morpeth and respondents in the South East most frequently visited Cramlington (31%), Ashington (28%) and Blyth (26%).

Question	Net better (%)	A lot better (%)	Slightly better (%)	The same (%)	Slightly worse (%)	A lot worse (%)
Looking ahead a year from now, do you think the economic situation in this town will be…	**10.7**	1.6	9.1	31.4	35.7	22.3
In comparison to a year ago, do you think the economic situation of this town has got…	**7.8**	0.6	7.2	26.6	45.4	20.2

Around a tenth (11%) of respondents said that in a year's time the economic situation for the town they had mentioned previously would be either a lot or slightly better, and 8% said that when compared with the previous year the economic situation had improved.

There were high levels of concern over the economic situation of the town they had previously mentioned, as a fifth of respondents said it had become a lot worse since the previous year and a further 45% said it had worsened slightly. When considering the year ahead, 36% of respondents felt the economic situation of the town would become slightly worse and 22% said it would be a lot worse.

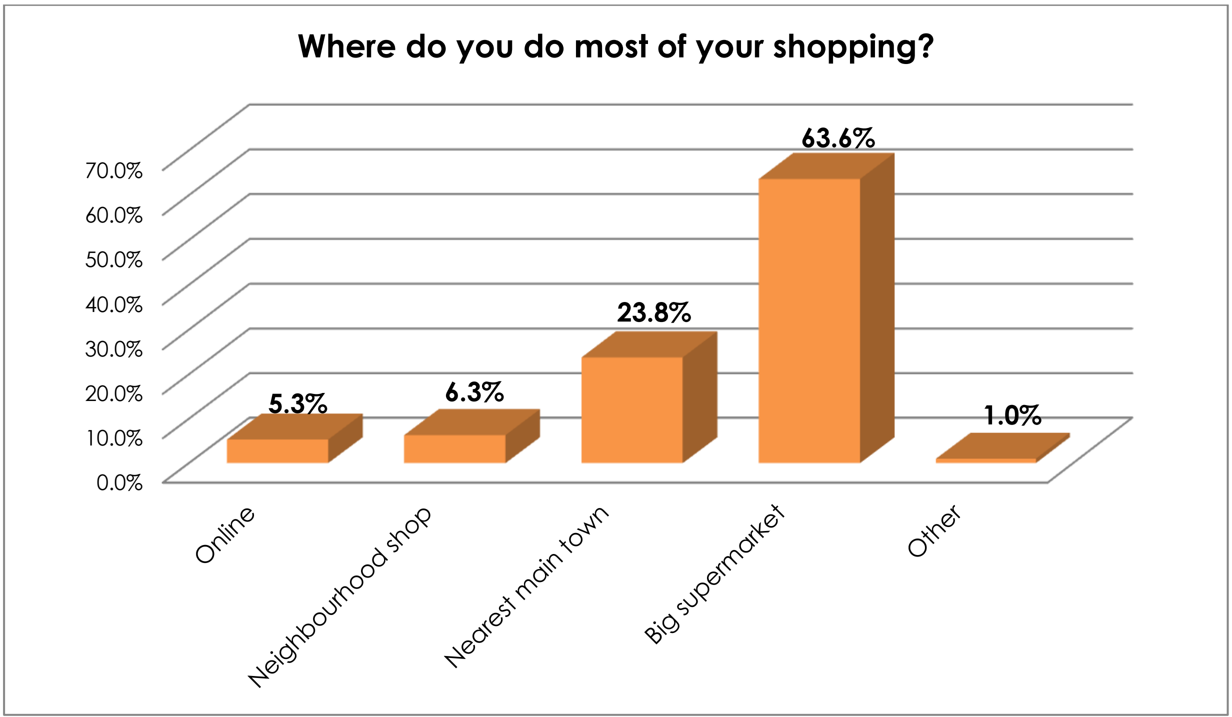
Which aspects below could be used to improve this town's economy?		
Aspect	**Number**	**Percentage**
More diverse range of shopping outlets	327	64.2
Support for existing businesses	319	62.7
Ease of parking	287	56.4
More small and medium sized businesses	264	51.9
Support for entrepreneurs / new businesses	241	47.3
Attractions	164	32.2
Improved transport links	132	25.9
More sport, leisure and cultural facilities	119	23.4
More education, skills, training and volunteering opportunities	109	21.4
Availability of finance / credit for business	108	21.2
Improved marketing	98	19.3
More relaxed planning rules	41	8.1
Stricter planning rules	38	7.5
More housing	31	6.1
Improved signage	11	2.2
Other	24	4.7

Respondents were asked what they felt could be done to improve the aforementioned town's economy, to which almost two thirds said the town would benefit from more diversity in the range of shopping outlets (64%). Respondents also identified a need for additional support for businesses, as 63% said more support was needed for existing businesses and 47% felt extra support was needed for entrepreneurs / new businesses.

Other aspects frequently identified for improving the town's economy were improved parking (56%) and more small / medium sized businesses (52%).

Some methods for improving the town's economy tended to be more specific to particular areas of Northumberland, for example 72% of respondents in the South East said the economy of the town they had mentioned could be improved by more diversity in the shopping outlets, however only 50% of respondents living in the North said that this was the case for the town they had mentioned. Similarly 71% of respondents living in the North identified ease of parking as an aspect that could improve the town's economy, whereas only 44% of respondents living in the South East said that this was the case.

4.2.7 Location for Shopping



Almost two thirds (64%) of respondents did the majority of their shopping at a big supermarket. Around a quarter (24%) of respondents did their shopping at the nearest main town, with just 6% of respondents saying that most of their shopping was done at their neighbourhood shop.

Male respondents (68%) most frequently said their shopping was done at a big supermarket (+8% compared with females); while female respondents most frequently said they visited the nearest main town when doing most of their shopping (+7% compared with males).

Respondents with a disability were significantly more likely to say that their shopping was either done at a neighbourhood shop (12%) or online (11%).

Three quarters of respondents living in the South East visited a big supermarket when doing most of their shopping; this is around 20% higher than respondents in the North and West who visited a big supermarket (54% and 55% respectively).

Few respondents living in the South East (17%) visited the nearest town to undertake most of their shopping; around three tenths of respondents living in the North (30%) and West (29%) said that the majority of their shopping was done at a nearby town.

4.2.8 Strengthening the Economy

Thinking about the strengths of Northumberland's economy, which of the following sectors do you think are the strongest and which do you think should be encouraged the most?

Sector	Strongest (%)	Need most encouragement (%)
Public services – councils, hospitals, police	55.4	31.0
Retail – shops and supermarkets	42.3	33.6
Agriculture, forestry and fishing	40.3	28.2
Tourism and recreation	39.3	51.5
Energy and water – electricity, gas and water supply	23.2	12.7
Hotels and restaurants	22.0	22.1
Finance services – banking, building societies, insurance, pensions	15.7	7.4
Pharmaceuticals	11.3	8.7
Business service – solicitors, IT, equipment and vehicle hire, printing	10.9	7.6
Advanced manufacturing – engineering and vehicles, chemical, fuel processing and production	9.9	35.8
Mining and quarrying	9.7	4.4
Transport and communication	8.1	21.1
Construction	7.7	29.8
Other	0.4	1.2

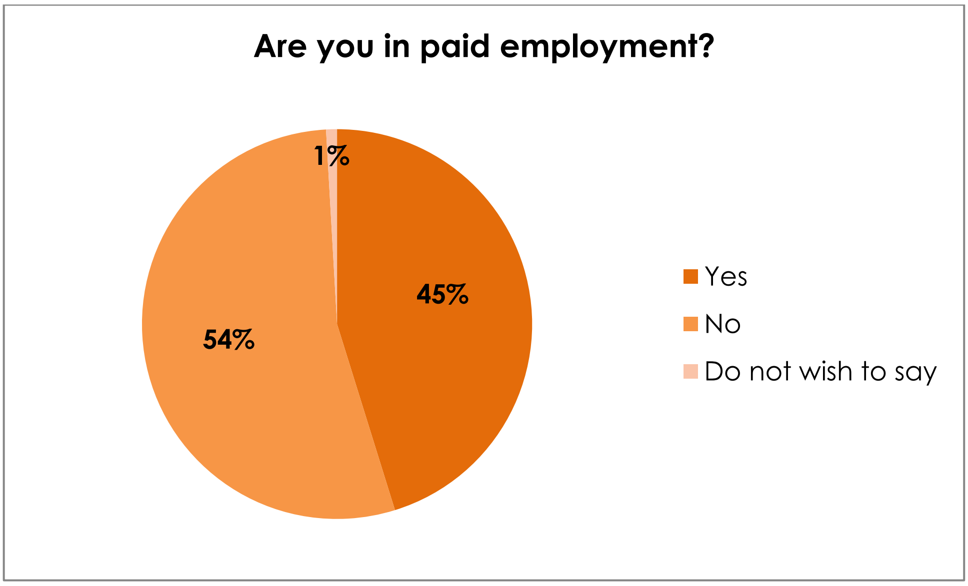
More than half (55%) of respondents considered public services to be the strongest sector within Northumberland, and 31% said that this was the sector which should receive the most encouragement. Retail (42%), agriculture, forestry and fishing (40%) and tourism and recreation (39%) were also considered by many to be strong sectors within Northumberland.

Despite 39% of respondents saying that tourism and recreation was the strongest sector within Northumberland, 52% of respondents said that with encouragement this was a sector which had the potential to support local economic growth. Around a third of respondents identified advanced manufacturing (36%) and retail (34%) as sectors which, with encouragement, could support economic growth within Northumberland.

Mining and quarrying was considered to be neither a strong sector within Northumberland (10%) nor one which should be encouraged to help the economic growth of the area (4%).

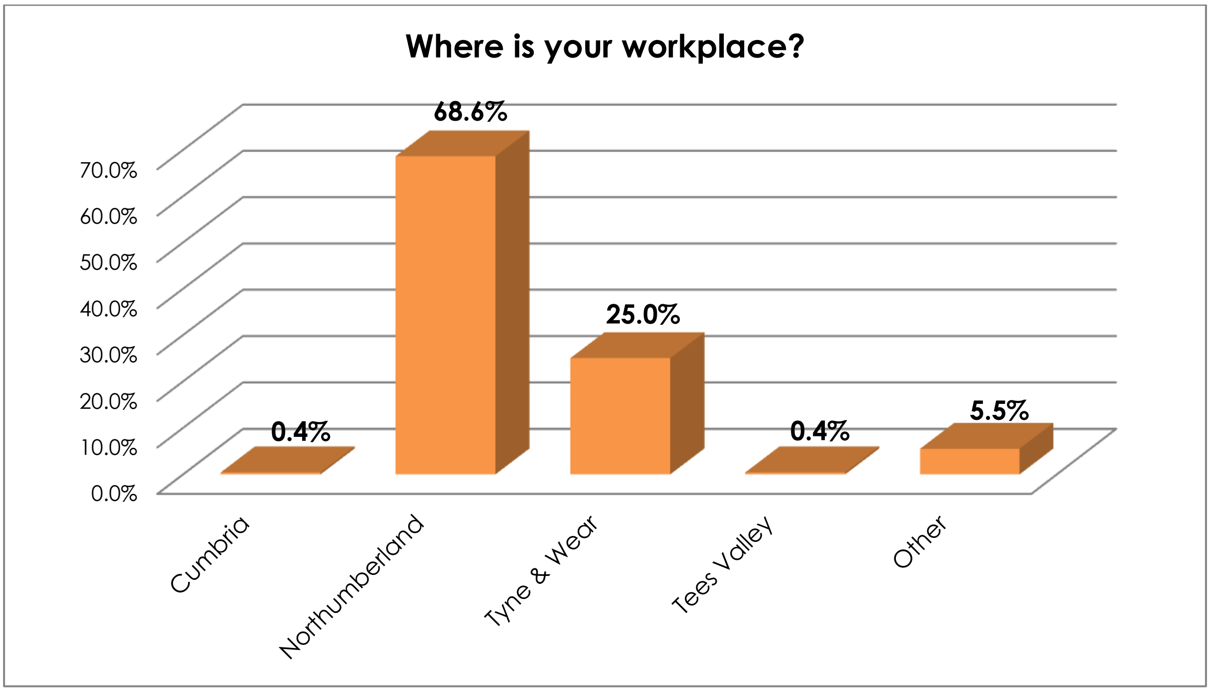
4.3 Employment

4.3.1 Employment Status



A little under half (45%) of respondents were in paid employment, meaning 54% were not. The majority of respondents aged 18 to 39 (88%) were in paid employment, as were more than two thirds (69%) of respondents aged 40 to 59; only a tenth of respondents aged 60 and over were in paid employment.

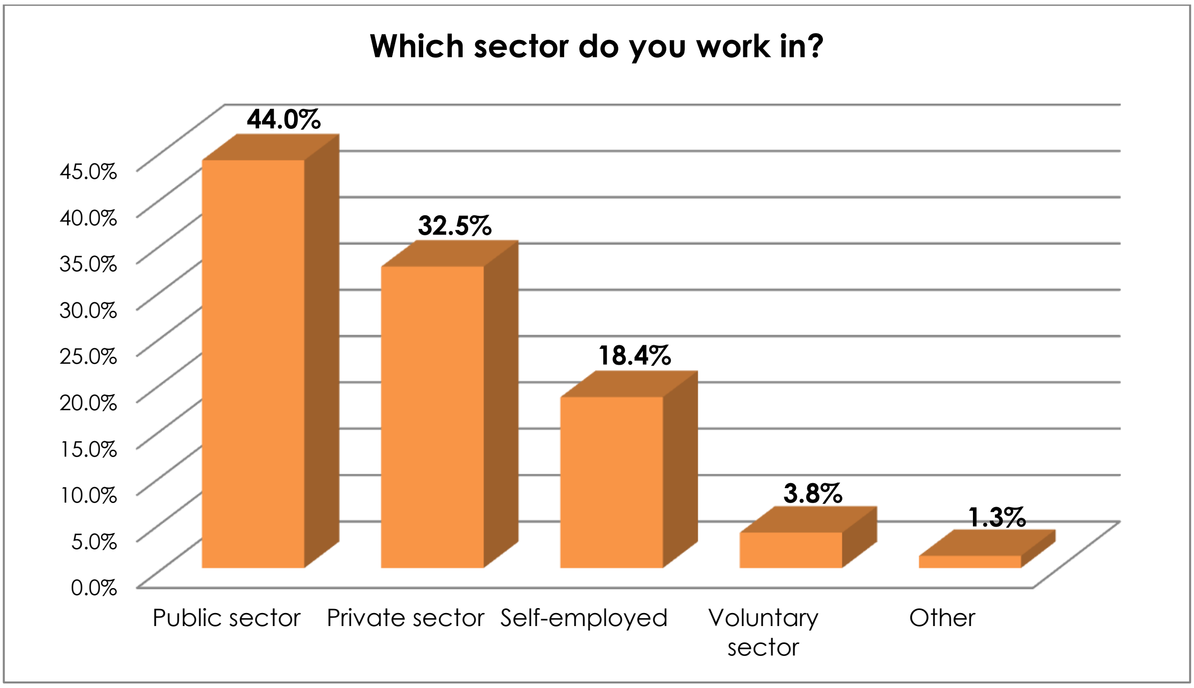
4.3.2 Employer



More than two thirds (69%) of respondents who were in paid employment worked in Northumberland. The majority of respondents whose workplace was outside of Northumberland worked in Tyne and Wear (25%).

Female respondents were more likely than male respondents to work in Northumberland (74% compared with 63%); males were more likely to have a workplace in Tyne and Wear (30% compared with 21%).

Respondents aged 40 to 59 were more likely to travel outside of Northumberland to their workplace, as only 64% worked within Northumberland.

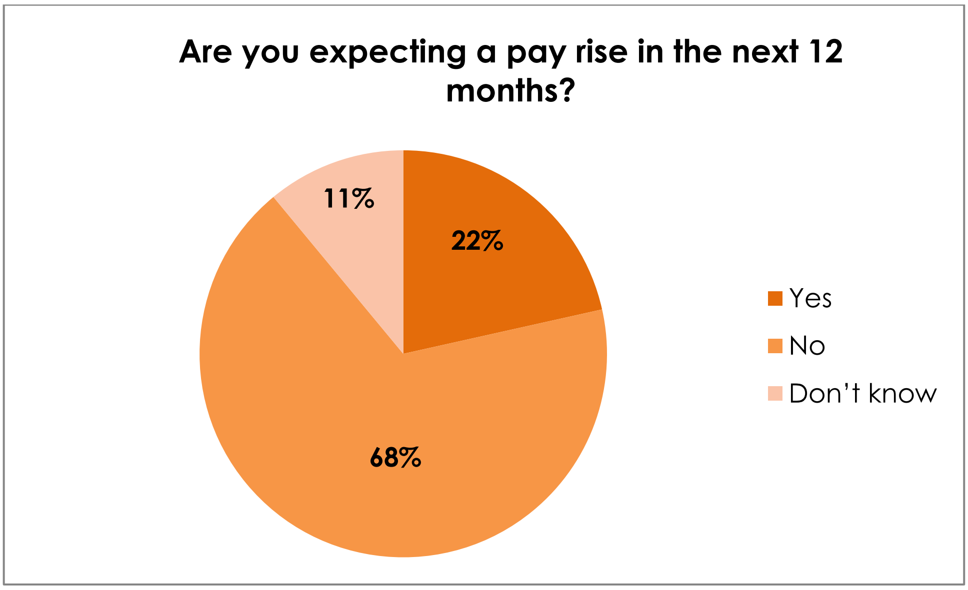


More than two fifths (44%) of respondents were employed in the public sector, 33% of respondents worked in the private sector and 18% were self-employed.

More than half (55%) of females worked in the public sector; 23% higher than male respondents working in the public sector (32%). Male respondents (26%) were more likely to be self-employed than female respondents (11%).

Within the South East area there was a greater ratio of respondents employed in the private sector (39%), and only 12% of respondents in this area were self-employed. More than a quarter (26%) of respondents living in the West were self-employed, while employment in the public sector was highest among respondents living in the North (48%).

4.3.3 Pay

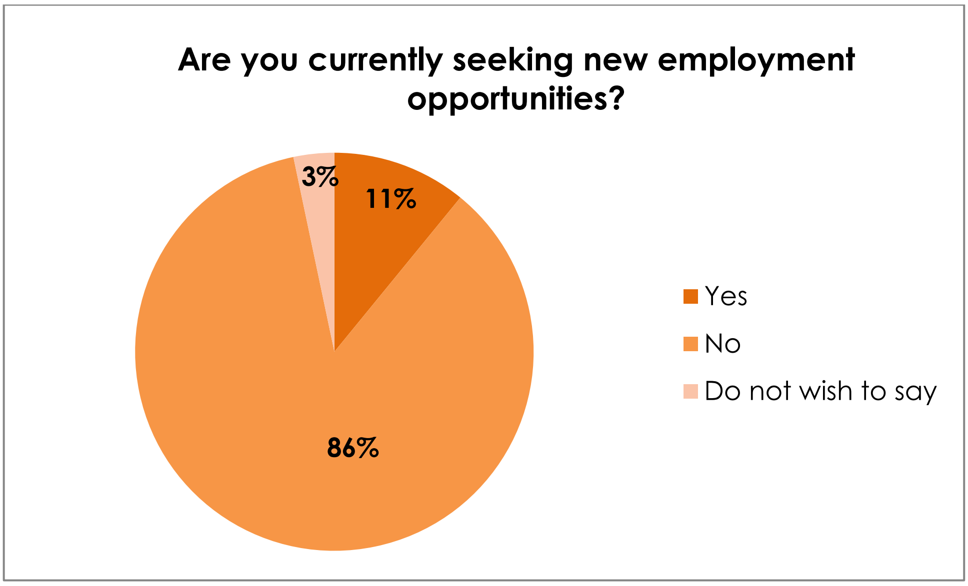


Around a fifth (22%) of respondents expected a pay rise within the following year. More than two thirds (68%) of respondents were not expecting a pay rise in the twelve months after taking part in the consultation and 11% said it was something they were unsure of.

Male respondents (26%), those aged 40 to 59 (24%) and those living in the West (26%) most frequently said they were expecting their pay to increase within the next twelve months.

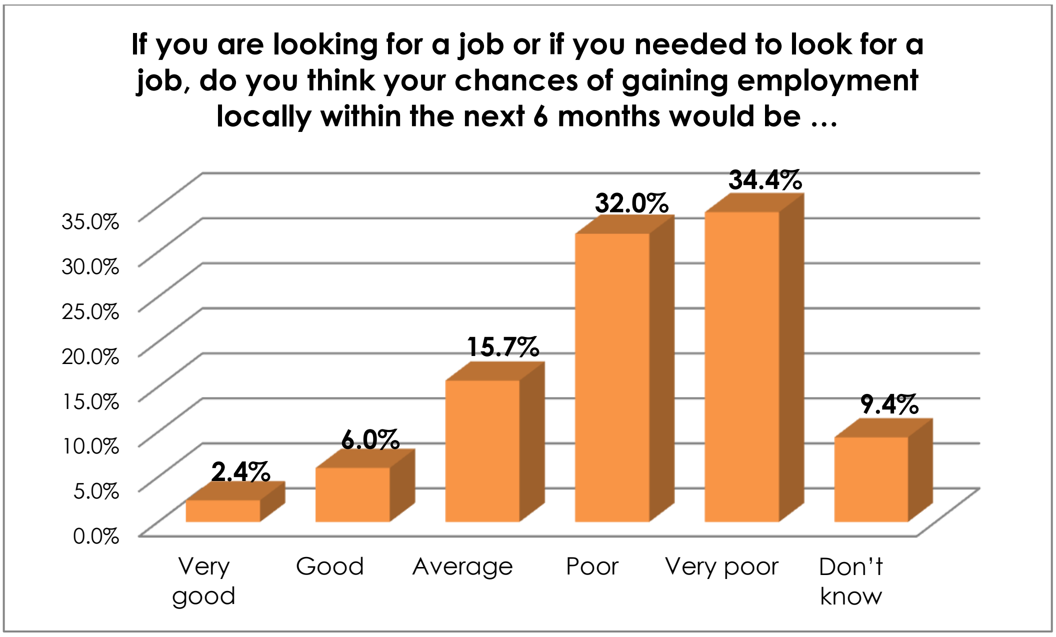
In opposition to this, female respondents (72%), respondents aged 18 to 39 (73%) and those living in the North (76%) were most likely to say they did not expect a pay rise in the following year.

4.3.4 New Employment Opportunities



Around a tenth (11%) of respondents were seeking new employment opportunities, however the majority (86%) of respondents were not.

Respondents aged 18 to 39 (21%) and those who did not have a disability (12%) were most likely to be looking for new employment opportunities; only 1% of respondents aged 60 and over and 3% of those with a disability were looking for new employment.



Respondents tended to be sceptical about their chances of gaining local employment in the next six months, with two thirds (66%) of respondents saying their chances of finding such employment would be either poor or very poor. Only 2% of respondents said their chances of securing local employment would be very good, and 6% said the probability would be good.

The perception that the opportunities to gain local employment would by very good or good decreased with age. Around a fifth (19%) of respondents aged 18 to 39 said their chances of gaining such employment would be good (including responses of both good and very good), whereas this decreased to 8% among respondents aged 40 to 59 and 3% among respondents aged 60 and over.

No respondents with a disability said their chance of securing employment within the local area was either good or very good, and 63% viewed their chances as very poor.

Why is this? (Very good, Good, Average)		
Reason	**Number**	**Percentage**
Right skills	51	44.3
Qualifications	38	33.0
Experience in the type of jobs available locally	31	27.0
Willing to work in a different sector	28	24.3
Number of vacancies	27	23.5
Types of vacancies	23	20.0
Willing to travel	22	19.1
Would retrain	18	15.7
Would accept a lower waged / different terms and conditions	12	10.4
Live close to good transport links	8	7.0
Willingness to relocate	5	4.3
Other	30	26.1

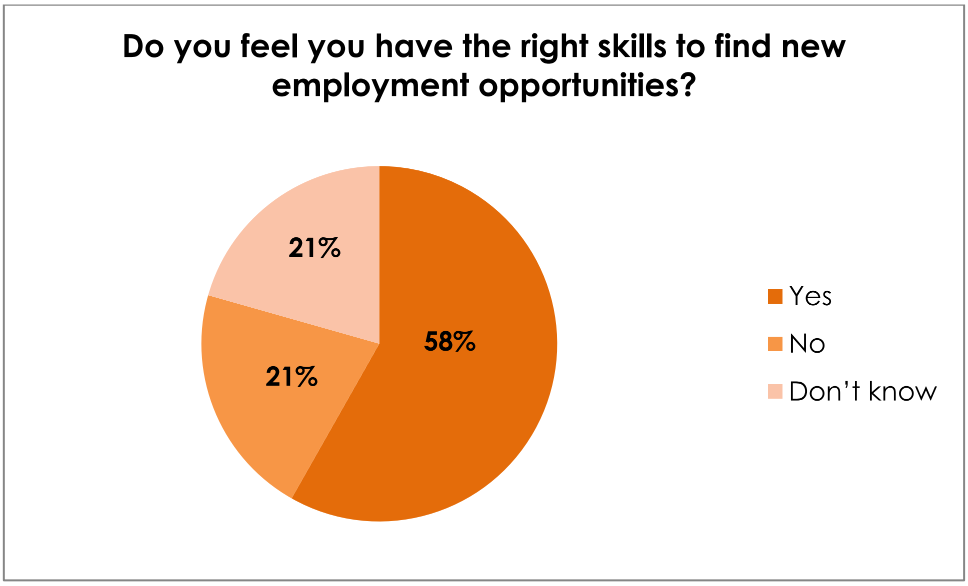
Respondents who said their chances of gaining local employment would be either very good, good or average most frequently attributed this to having the required skills (44%), qualifications (33%) and experience (27%).

Why is this? (Poor, Very Poor)		
Reason	**Number**	**Percentage**
Number of vacancies	122	50.8
Type of vacancies	92	38.3
Public sector spending reductions	61	25.4
National Government budget decisions	42	17.5
Lack of skills	31	12.9
Level of wages	30	12.5
Type of skills	26	10.8
Qualifications	25	10.4
Location / too far away	23	9.6
Lack of / not the right experience	22	9.2
Caring commitment	20	8.3
Lack of transport	19	7.9
Lack of childcare	10	4.2
Willing to work in a different sector	8	3.3
Other	73	30.4

Respondents who felt the likelihood of them securing new employment in the local area was either poor or very poor, most frequently said that this perception came from the number (51%) and type (38%) of vacancies in the area. Respondents also recognised public sector spending reductions (25%) and National Government budget decisions (18%) as factors which would influence their chances of obtaining employment.

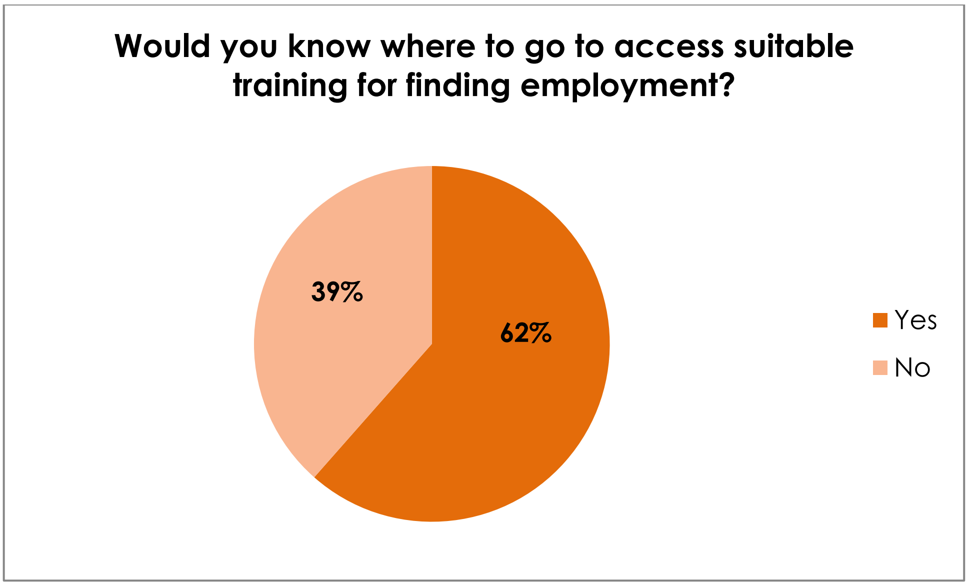
Many respondents who gave 'other' reasons for their chances of gaining employment as poor said it was due to them being retired.

4.3.5 Skills and Training

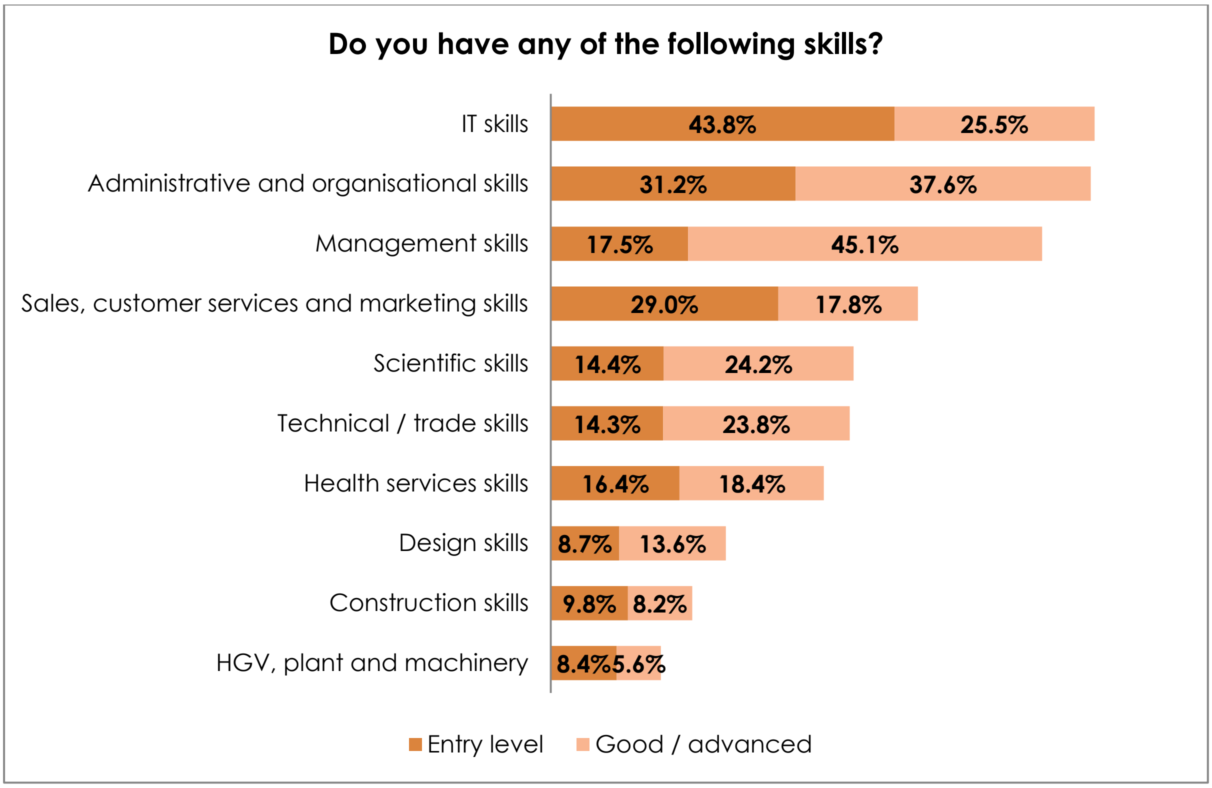


Almost three fifths (58%) of respondents were confident that they had the appropriate skills required to find new employment opportunities however, around one fifth (21%) felt they did not have the skills needed to find new employment. An additional 21% of respondents said that they did not know if they had the right skills to be successful in finding new employment.

The majority (79%) of respondents aged 18 to 39 felt they had the skills to find new employment, as did 61% of respondents aged 40 to 59. Only 38% of respondents aged 60 and over felt they had the skills that were need to find new employment.



Around three fifths (61%) of respondents knew where to go to access suitable training to find employment. Awareness was highest among female respondents (67%), those who did not have a disability (64%) and respondents living in the South East (67%).



More than two thirds of respondents said they possessed IT skills (69%) and administrative and organisational skills (69%). Of the 62% of respondents who reported having management skills, 45% said these skills were at a good / advanced level.

Almost half (47%) of respondents had sales, customer services and marketing skills however, only 18% did so at a good / advanced level. Although high numbers of respondents had IT skills, again the majority said these skills were entry level (44%) rather than good / advanced (26%).

Fewer respondents had skills in construction (18%) or HGV, plant and machinery (14%).

4.3.6 Qualifications

Do you have any of the following qualifications?		
Qualification	**Number**	**Percentage**
English grade C or above (GCSE, NVQ Level 2, O Level)	284	80.2
Math grade C or above (GCSE, NVQ Level 2, O Level)	247	69.8
Professional qualification (solicitor, engineer, surveyor)	128	36.2
Science or technical subject (A Level / NVQ Level 3)	124	35.0
Degree or higher in a science based or technical subject	98	27.7
Management qualification	78	22.0
Qualified trade (e.g. electrical / mechanical fitter)	43	12.1

Eight out of ten respondents had an English qualification at grade C or above, and seven out of ten respondents had this level of qualification in mathematics. More than a third of respondents had a professional qualification (36%) or a qualification in a science or technical subject (35%).

Female respondents were more likely than male respondents to have an English (+16%), mathematics (+14%) and professional (+4%) qualification. Aside from these, male respondents more frequently said they had all other qualifications listed, with differences from females ranging from 5% (management qualification) to 21% (qualified trade).

Respondents living in the West were most likely to have a mathematics qualification (78%), degree or higher in a science based or technical subject (36%) and a professional qualification (46%). When considering five of the seven qualifications listed, respondents in the South East were least likely to have obtained the qualification.

4.3.7 Future Employment

Would you be willing to work in any of the following sectors in the future?		
Sector	**Number**	**Percentage**
Tourism services, attractions and accommodation	149	64.5
Creative industries	103	44.6
Renewable energy	81	35.1
Pharmaceuticals / life sciences / chemicals	76	32.9
Online retail	68	29.4
Advanced manufacturing	67	29.0
Financial services	56	24.2
Aquaculture	55	23.8

Around two thirds (65%) of respondents would be willing to work in tourism services, attractions and accommodation in the future; with 76% of female respondents saying they would be willing to work in this sector.

Willingness to work in the creative industries was high (45%) and again this was higher among female respondents (50%). Female respondents also expressed the greatest interest for working in the online retail sector (37%).

Male respondents more frequently indicated that they would be willing to work in the renewable energy (53%), advanced manufacturing (47%) and pharmaceuticals / life sciences / chemical (42%) sectors.

Tick the statements you agree with		
Statement	**Number**	**Percentage**
I have personal skills and attributes which I can use at work	197	70.6
I expect my work to be able to fit in with my personal life	154	55.2
Having a job is more important to me than which sector I work in	123	44.1
I want to work for a large employer with stability and a good chance of career progression	121	43.4
I want to run or work in a small organisation close to the user / customer	77	27.6
I mainly have qualifications that employers in Northumberland want	58	20.8
I want to develop my career further and I can do this in Northumberland	49	17.6
The distance I travel to work is becoming or is a problem for me	45	16.1
I will be working in a totally different sector of the economy in five years' time	25	9.0

Although only 58% of respondents had said they had the right skills to gain new employment, 71% of respondents had personal skills and attributes which they were able to use for work.

More than half (55%) of respondents expected their employment to fit in with their personal life; agreement with this statement was particularly high among respondents aged 18 to 39 (63%).

Opinion was divided on the type of employer which appealed to respondents, as 43% of respondents indicated a preference for a large employer with stability and opportunities for career progression whereas 28% said they wanted to run / work for a small organisation that was close to the user / customer.

More than two fifths (44%) of respondents said that being employed was more important to them than the sector in which they worked in, and 9% of respondents anticipated that they would be employed in a different sector in five years' time.

4.4 Future Development to Support Economic Growth

4.4.1 Main Northumberland Town

Based on a broad range of community services, facilities and good transport links, please rank the 5 towns you consider to be the main towns in Northumberland (option 1, most important)		
Town	**Number**	**Percentage**
Morpeth	167	43.8
Cramlington	60	15.7
Hexham	59	15.5
Alnwick	27	7.1
Blyth	25	6.6
Ashington	21	5.5
Berwick-upon-Tweed	7	1.8
Prudhoe	6	1.6
Ponteland	5	1.3
Bedlington	2	0.5
Amble	1	0.3
Haltwhistle	0	0.0
Other	1	0.3

When asked which they considered to be the main town in Northumberland, respondents most frequently selected Morpeth (44%). Cramlington (16%) and Hexham (16%) were also selected as the main town by more than a tenth of respondents.

Again the perceived main town varied by area. Almost three fifths (58%) of respondents living in the North selected Morpeth as the main town whereas respondents in the South East most frequently selected Cramlington (29%) and those in the West were the most likely to choose Hexham (41%).

4.4.2 New Housing Development

When considering where future new housing development should take place, please tick the approach which you think is most appropriate for Northumberland		
Approach	**Number**	**Percentage**
Provide new housing development at a scale which will complement the existing settlement pattern and sizes	275	56.2
Concentrate the majority of new housing development in Northumberland's main towns, with less in other smaller settlements	138	28.2
Allow more new housing development to take place in villages and hamlets, with less in the main towns and larger villages	50	10.2
Allow new housing development to take place in the open countryside	18	3.7
Other	8	1.6

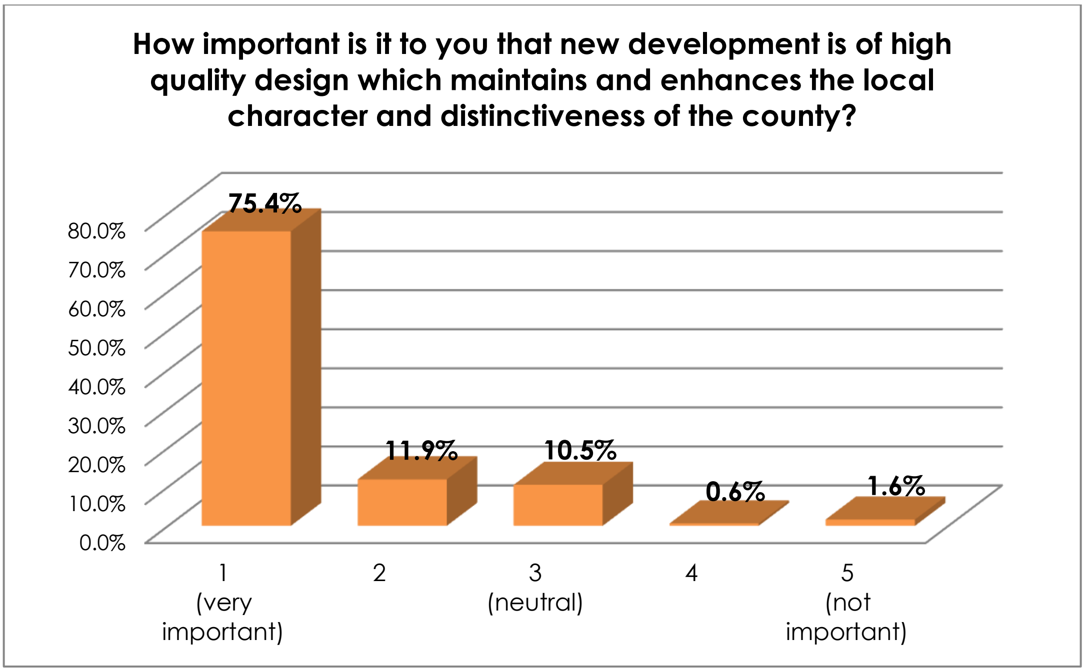
Respondents were given four possible options as to where the future new housing development should take place and were asked to select the option which they felt was the most appropriate. The most popular approach was for new housing development to be at a scale which complements the existing settlement pattern and sizes; 56% of respondents selected this as the most appropriate approach.

More than a quarter (28%) of respondents favoured an opposing approach which would concentrate the majority of new housing development in the main towns with less in smaller settlements.

Few respondents (4%) felt that it was appropriate to allow new housing development to take place in the open countryside.

Female respondents expressed a greater preference for providing housing which would complement the existing settlement pattern (+5% when compared with males); males indicated a greater preference than females for concentrating the majority of new development in the main towns in Northumberland (+6%).

Respondents across the three areas of Northumberland held similar views on what would be the most appropriate approach to new housing development. The opinion that new housing should be concentrated on the main towns was slightly higher among respondents living in the West (34%), and respondents living in the North more frequently said more housing developments should be allowed in villages and hamlets, rather than towns and larger villages (15%).



Three quarters of respondents said it was very important that new developments were of a high design, maintaining and enhancing the local character and distinctiveness of the county; only 2% of respondents said it was not important that new developments were designed in this way.

Nine tenths of respondents living in the North rated this high quality design as important; this is slightly higher than respondents who expressed this opinion in the West (88%) and South East (85%).

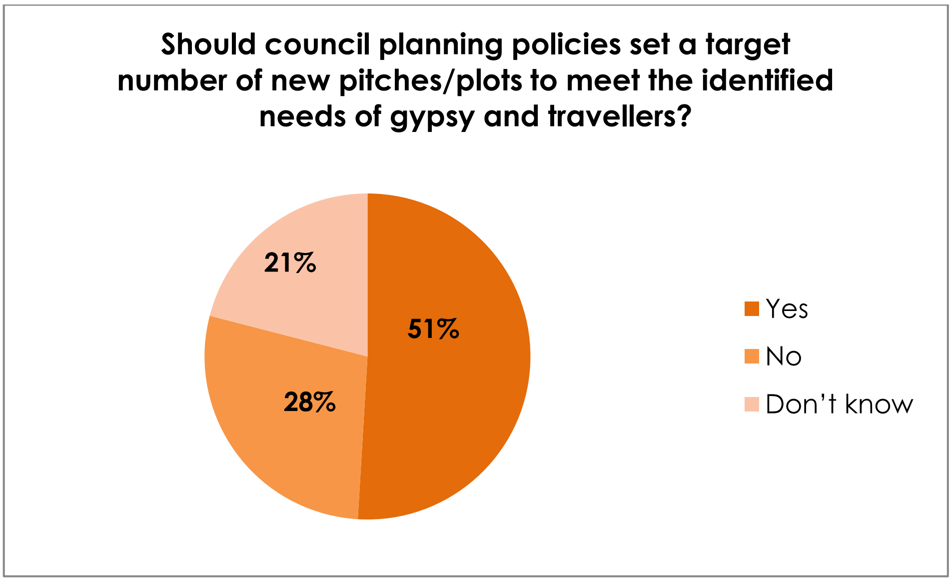
4.4.3 Community Services and Facilities

When choosing where to live which of the following community services and facilities are important to you? (option 1, most important)		
Aspect	**Number**	**Percentage**
Good transport links	126	30.0
Health and social care provision	105	25.0
Educational facilities	84	20.0
Retail food shops	41	9.8
Post Office	21	5.0
Community / village halls	16	3.8
Good cycle and rights of way networks	8	1.9
Sports and recreation facilities	6	1.4
Religious establishments	3	0.7
Libraries	2	0.5
Non-food shops	2	0.5
Pubs	2	0.5
Other	4	1.0

When selecting a location to live, three tenths of respondents said that good transport links were important to them. Health and social care provision (25%) and educational facilities (20%) were also important factors when choosing where to live.

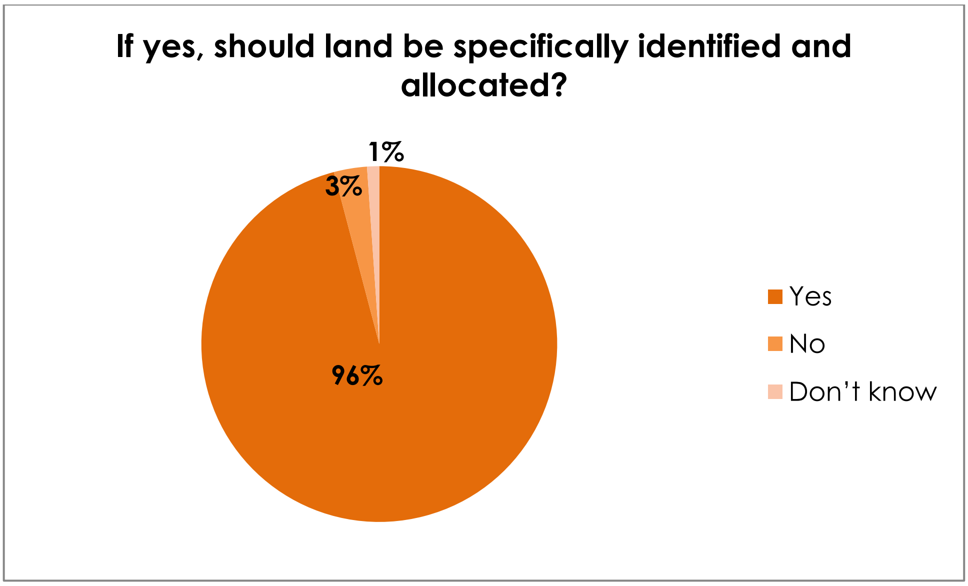
Good transport links were more important when choosing a place to live for female respondents (32%) and those living in the South East (34%); male respondents (27%) and those living in the West (24%) considered transport links to be less important.

4.4.4 Gypsies and Travellers



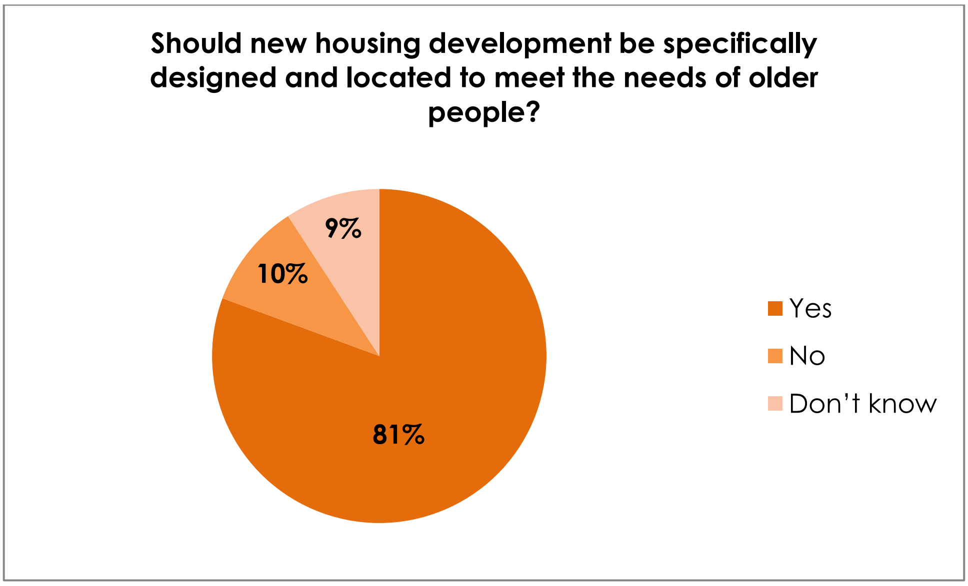
Around half (51%) of respondents agreed that council planning policies should set a target number of pitches / plots to meet the identified needs of travellers. Although 28% of respondents did not think council planning should allocate pitches in consideration of these needs, 21% of respondents said that they did not know.

A third of respondents living in the South East were opposed to this proposal; around a tenth higher than opposition in the West (23%) and North (25%) areas.



Among respondents who said that a target number of pitches / plots should be set to meet the needs of gypsies and travellers, almost all (96%) said that the land should be specifically identified and allocated.

4.4.5 Older People



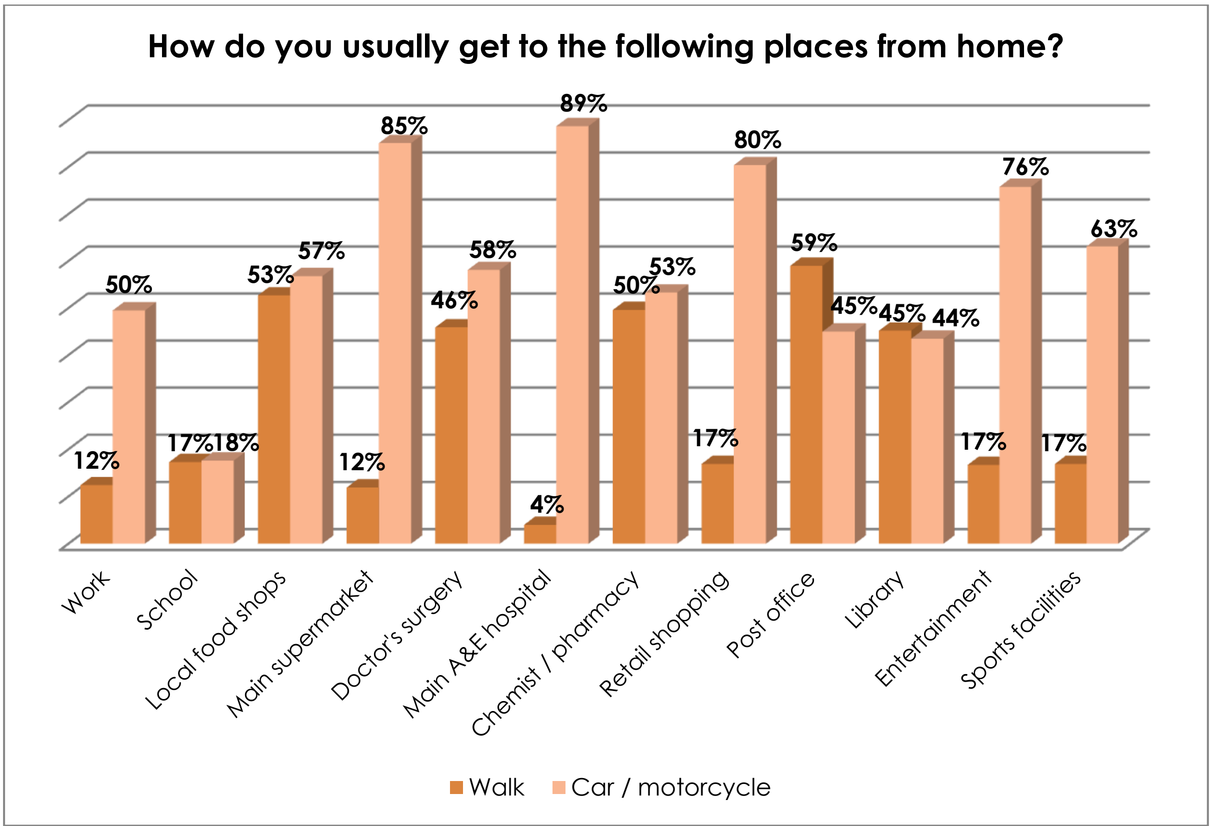
Around four fifths (81%) of respondents said that new housing development should be specifically designed to meet the needs of older people; only a tenth of respondents said that new housing development should not.

There was little variance in opinion between demographic grouping however, respondents living in the West (85%) were more likely than those living in the South East (80%) and North (77%) to say that new housing development should be designed for the needs of older people.

4.5 Transport and Sustainable Development

4.5.1 Transport

Respondents were given twelve locations and asked how they usually travelled to each of the destinations. For all of the destinations walking and a car or motorcycle was the two most popular modes of transport; the frequency which they were selected is shown in the chart below:



When travelling to the main A&E hospital (89%), main supermarket (85%), retail shopping (80%) and entertainment facilities (76%) a car or motorcycle was the mode of travel used by at least three quarters of respondents.

The greatest proportion of respondents said they would walk when going to their local post office (59%), and at least half of respondents would walk to their local food shops (53%) and chemist / pharmacy (50%).

Although not as popular as a car or motorcycle and walking, travelling by bus was also popular for some of the activities mentioned:

- Retail shopping (16%)
- Entertainment (14%)

In general what are the obstacles to using more sustainable forms of transport?					
Obstacle	**Walk (%)**	**Pedal cycle (%)**	**Bus (%)**	**Metro / train (%)**	**Community transport (%)**
Lack of personal comfort and safety	24.6	31.1	18.1	11.6	9.5
Lack of safe routes and facilities	21.1	**45.3**	5.9	8.3	5.6
Cost too high	0.4	0.4	37.7	44.6	8.7
Poor information about routes	4.7	10.7	22.1	9.5	31.0
Poor weather conditions	**54.7**	40.9	9.0	3.7	4.0
Takes too long	51.6	28.4	**43.9**	13.2	17.5
Health issues	27.3	20.4	7.2	5.8	8.7
Physical access is not possible	8.2	7.6	5.3	12.4	13.5
Lack of suitable service	2.7	1.3	41.7	**55.4**	**54.0**
Service is unreliable	2.7	1.8	27.4	12.0	20.6

Respondents were asked to give the reasons which prevented them from using more sustainable forms of transport.

Walk

More than half (55%) of respondents said that they did not walk due to poor weather conditions; a further 52% of respondents said that walking would take too long.

Safety was also identified as an issue that prevented respondents from walking as 25% said walking offered a lack of personal comfort and safety and 21% identified a lack of safe routes and facilities.

Opting not to walk as it would take too long applied to more respondents living in the West (70%); more respondents living in the South East said that poor weather conditions prevented them from walking (62%).

Pedal Cycle

The main reason given for not travelling by pedal cycle was a lack of safe routes and facilities (45%), with respondents living in the North (59%) most frequently saying that this was the case.

Similar to walking, respondents were deterred from cycling due to bad weather conditions (41%). In addition around three tenths of respondents felt a lack of personal comfort and safety when using a pedal cycle (31%) or said that cycling would take too long (28%).

Respondents living in the West most frequently said that the length of time the journey would take was an obstacle to them cycling (45%); those living in the South East most frequently identified poor information on routes as an issue (16%).

Bus

More than two fifths of respondents said that they did not use the bus service as the journey would take too long (44%) or there was not a service that was suitable (42%). A large proportion (37%) of respondents also said that they did not use the bus service as the costs were too high.

Male respondents were significantly more likely than female respondents to say that they did not use the bus service as there was a lack of personal comfort and safety (+11%) and there was poor information about the routes (+10%).

Respondents in the South East identified more obstacles to using the bus service. Respondents in this area were significantly more likely to say that bus journeys took too long (50%), the costs were too high (48%) and they felt a lack of personal comfort and safety when using the service (24%).

Respondents living in the North (53%) and West (52%) were significantly more likely than those living in the South East (29%) to say that a lack of a suitable service prevented them from using a bus.

Metro / Train

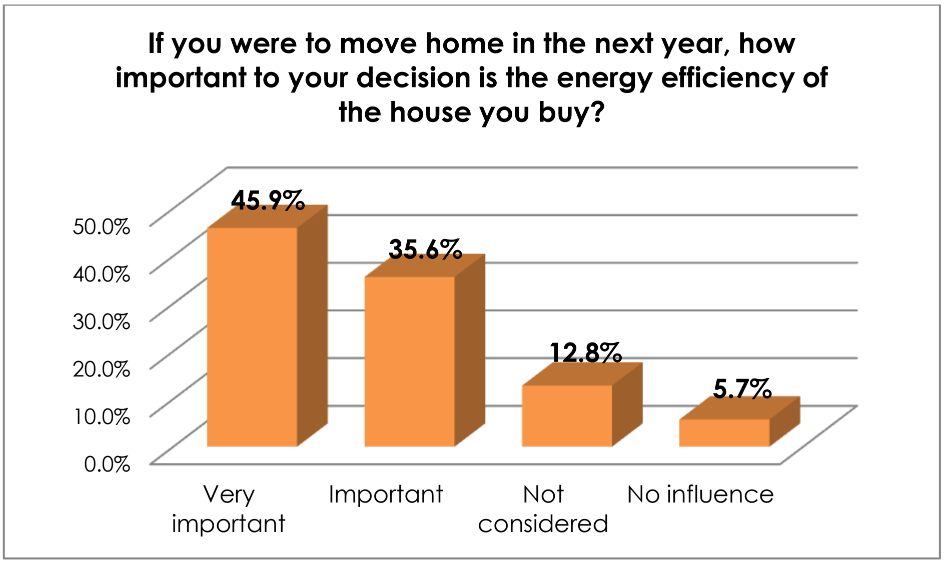
Similar to the bus service, a large proportion of respondents said that the service was not suitable for their needs (55%); a further 45% of respondents said that they did not use the metro / train as the costs were too high.

Almost two thirds (65%) of respondents living in the South East said that there was not a metro / train service that suited their needs; respondents living in the West (38%) were less likely to say that they were prevented from using the service as it was not suitable.

Community Transport

More than half (54%) of respondents did not use community transport due to a lack of a suitable service; around three tenths (31%) of respondents said that they did not use community transport as there was poor information about routes. In addition, around a fifth of respondents said this service was unreliable (21%) or took too long (18%).

4.5.2 Energy Efficiency



More than four fifths of respondents said that if they were to buy a new house, energy efficiency is something that would be either very important (46%) or important (36%) to them. Only 6% of respondents said that energy efficiency would have no influence in the decision they made.

Respondents aged 16 to 39 (86%) and 60 and over (84%) more frequently said that the energy efficiency of a new home would be important to them; fewer respondents aged 40 to 59 (79%) indicated that this was something which was either very important or important to them.

More than four fifths of respondents living in the South East (84%) and the North (84%) said that energy efficiency would be important in their decision to buy a house; this is 8% higher than respondents who considered this to be important in the West.

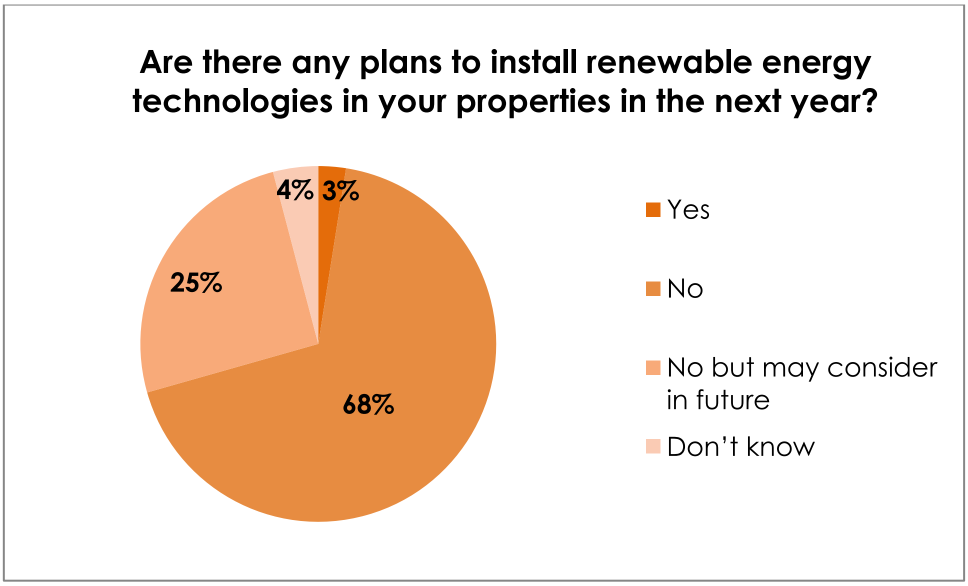
Are you planning any energy efficiency improvements over the next year, if so what is required?

Improvement	Number	Percentage
No plans for any energy efficiency improvements	323	65.0
Replace boiler	62	12.5
Install more efficient windows	39	7.8
Install / thicken loft insulation	35	7.0
Install wall insulation	19	3.8
Install thermostatic heating controls	17	3.4
Install floor insulation	13	2.6
Other	60	12.1

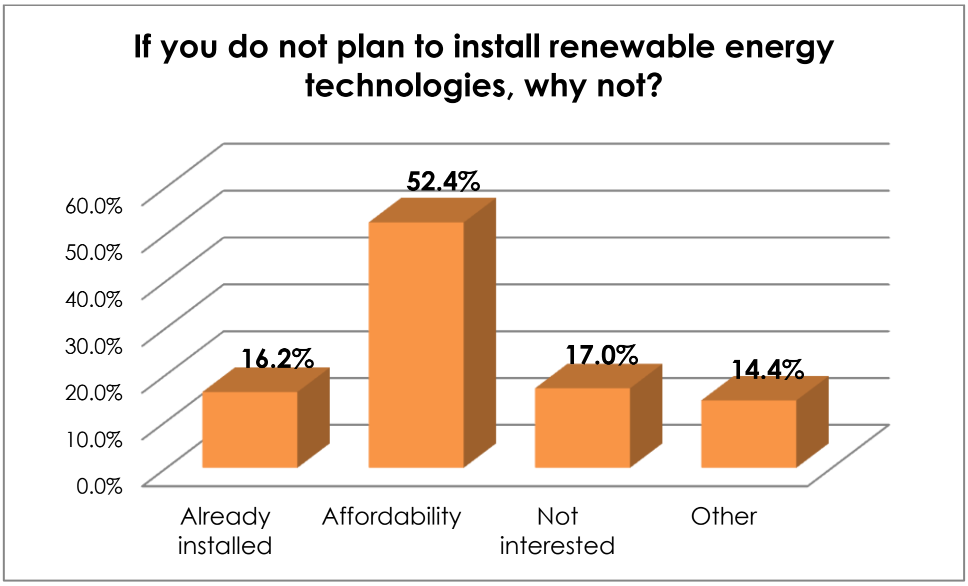
Almost two thirds (65%) of respondents had no plans for energy efficiency improvements within the following year. Those who were planning energy efficiency improvements most frequently reported that they were planning to replace their boiler (13%), install more efficient windows (8%) or install / thicken loft insulation (7%).

It was less common for respondents aged 60 and over to be planning energy efficiency improvements, as 69% of respondents in this age group said they had no plans in the coming twelve months. Respondents living in the West were also more likely to say they were not planning energy efficiency improvements (72%).

4.5.3 Renewable Energy



Similar to plans to improve energy efficiency, around two thirds (68%) of respondents did not plan to install renewable energy technologies to their property in the following year. Although only 3% of respondents had plans to install this type of technology in the following year, a quarter of respondents said that although they did not plan to do so it may be something which they would consider in the future.



More than half (52%) of respondents who did not plan to install renewable energy technologies said it was due to the affordability of doing so. Although 17% of respondents were not interested in such technologies, a similar proportion said it was something which they had already installed in their home.