



Kent Environment Survey Research report

Prepared by Lake Market Research
September 2018



Introduction and Background

- The Kent Environment Strategy: A strategy for environment, health and economy was published in 2016. It aims to strengthen cross-sector partnership working on environmental, health and economic agendas.
- The strategy identifies high level, evidence-based priorities and focuses on the activities that would most benefit from partnership working. It also identifies opportunities where the environment can provide positive outcomes for health, wellbeing and the economy.

- Evidence underpins the Kent Environment Strategy and a public perception survey has historically been the primary method of collecting feedback from Kent residents.
- It seeks to understand how residents perceive, use, and prioritise different aspects of the environment as well as conduct personal activity concerning energy efficient and energy saving behaviour.

KENT ENVIRONMENT STRATEGY

A STRATEGY FOR ENVIRONMENT, HEALTH & ECONOMY - MARCH 2016



Research Methodology

- 600 interviews were conducted with Kent residents (including Medway) in July 2018.
- This survey is intended to replicate previous studies conducted in the summer of 2014 and 2016, and is consistent in terms of interview methodology, sample size and demographic quota controls.
- The majority of questions have been kept identical to those asked previously to enable comparison.
- The questionnaire featured a small number of changes and additions reflecting current hot topics / changes in circumstance to previous years.

Demographic Profile



| | | |
|-----------------|----------------------|-----|
| GENDER | Male | 49% |
| | Female | 51% |
| AGE | Aged 16-24 | 16% |
| | Aged 25-44 | 31% |
| | Aged 45-64 | 32% |
| | Aged 65 and over | 21% |
| AREA | Ashford | 8% |
| | Canterbury | 6% |
| | Dartford | 7% |
| | Dover | 7% |
| | Gravesham | 7% |
| | Maidstone | 7% |
| | Medway | 15% |
| | Sevenoaks | 8% |
| | Folkestone and Hythe | 7% |
| | Swale | 7% |
| | Thanet | 5% |
| | Tonbridge & Malling | 8% |
| Tunbridge Wells | 7% | |

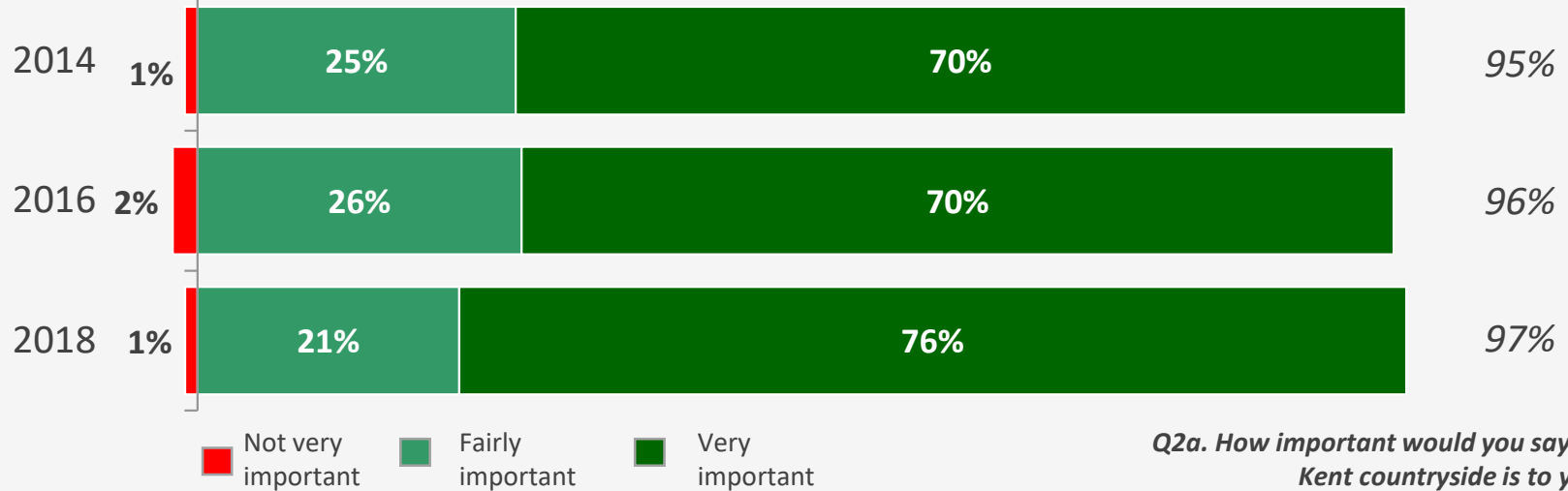
Perceptions of the Kent environment



Importance of the Kent countryside to respondents

97% consider the Kent countryside to be important, broadly consistent with previous years. The proportion rating 'very important' has increased from 2016.

Net:
Important

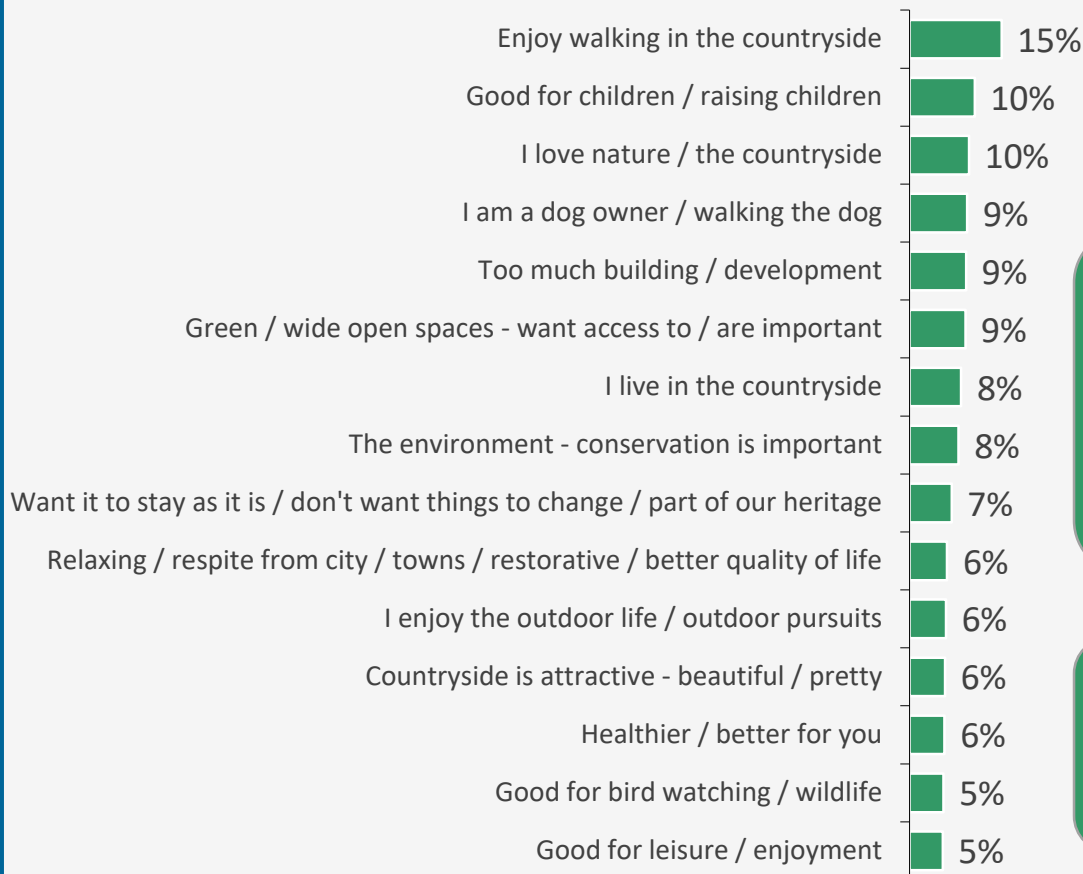


Whilst a higher proportion of 16-24 year olds consider the Kent countryside important compared to 2016, this proportion remains significantly lower than other age groups.

| % NET IMPORTANT | Aged 16-24 | Aged 25-44 | Aged 45-64 | Aged 65+ |
|-----------------|------------|------------|------------|----------|
| 2016 | 82% | 99% | 98% | 98% |
| 2018 | 89% | 97% | 99% | 98% |

Reasons residents value the Kent countryside

The reasons put forward are diverse in nature. As well as the range of activities undertaken, it is deemed important to offering quality of life, relaxation and enjoyment (notably in terms of family life). Development and conservation are also front of mind. There is little differentiation in response themes between those rating the countryside as 'very' or 'fairly' important to them.



"It's important as I do a lot of walking and I feel that we are losing a lot of the countryside and there seems to be more rubbish being discarded in the countryside as well."

"Because I have children it is something that I want them to benefit from in the future so it has to be maintained and looked after."

"I believe that being in tune with nature & having a good awareness of the quality of your surroundings has a very positive effect on a person's wellbeing."

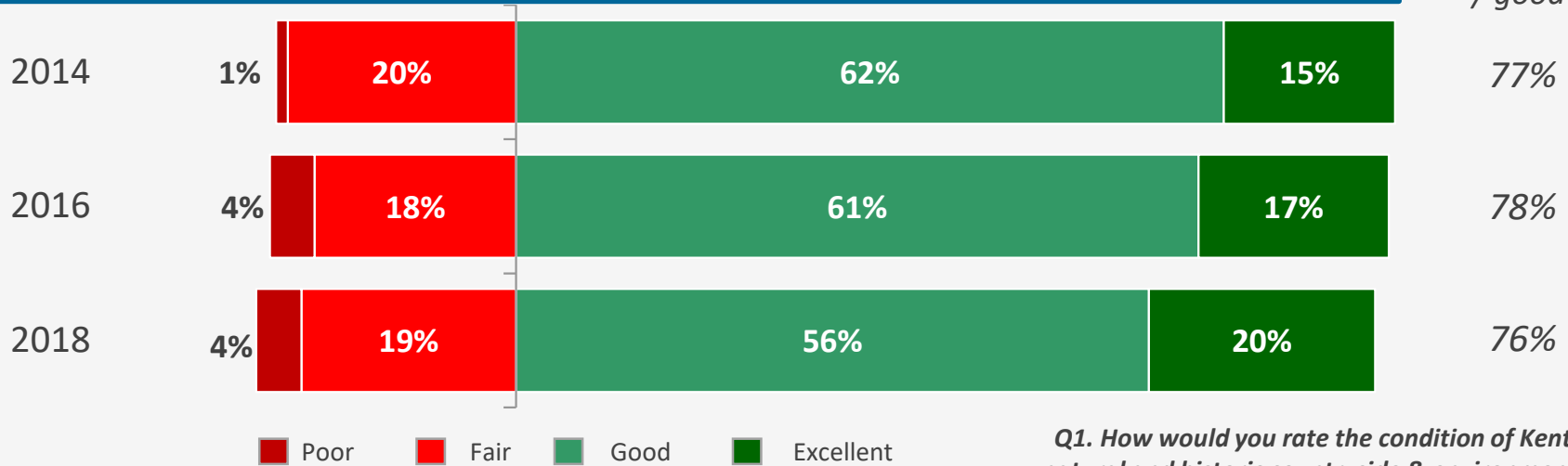
"Because we moved over 30 years ago to get away from the congestion we were living near, for a more greener location, but I now feel that we are going back in time as there are more houses being built and the traffic has increased a lot as well."

Q2b. Why do you say that?

Perceived condition of Kent's natural countryside and environment

Just over three quarters (76%) rate the condition as excellent or good, consistent with previous years. However, it should be noted that 23% rate it as fair or poor.

Net: Excellent / good

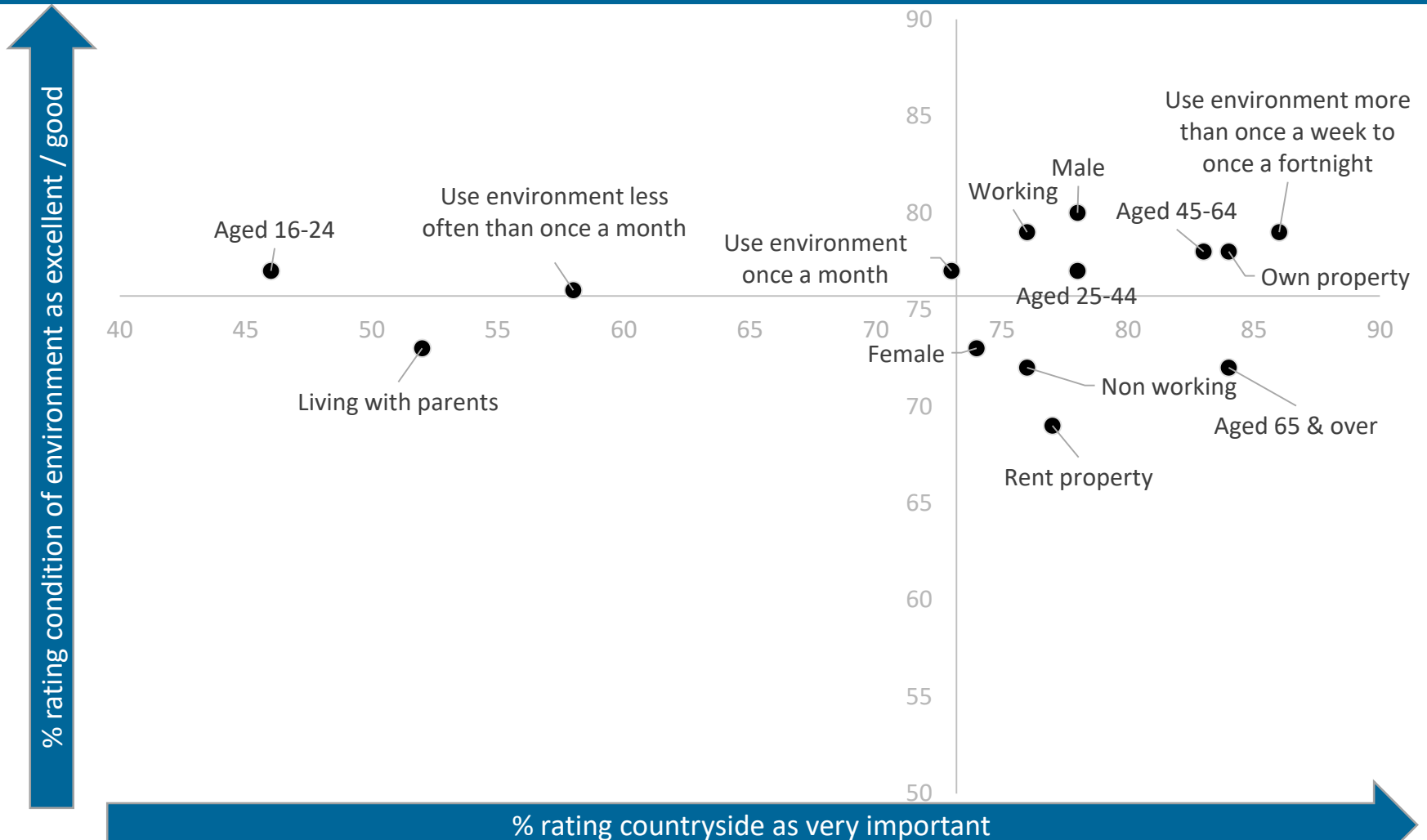


In a shift to the patterns observed last year, ratings are consistent across the 16-64 age groups. Ratings amongst the 16-24 and 25-44 age groups are lower compared to 2016 but not significantly. Perceptions amongst those 65 and over remain the lowest of the age groups.

| % EXCELLENT / GOOD | Aged 16-24 | Aged 25-44 | Aged 45-64 | Aged 65+ |
|--------------------|------------|------------|------------|----------|
| 2016 | 83% | 82% | 74% | 71% |
| 2018 | 77% | 77% | 78% | 72% |

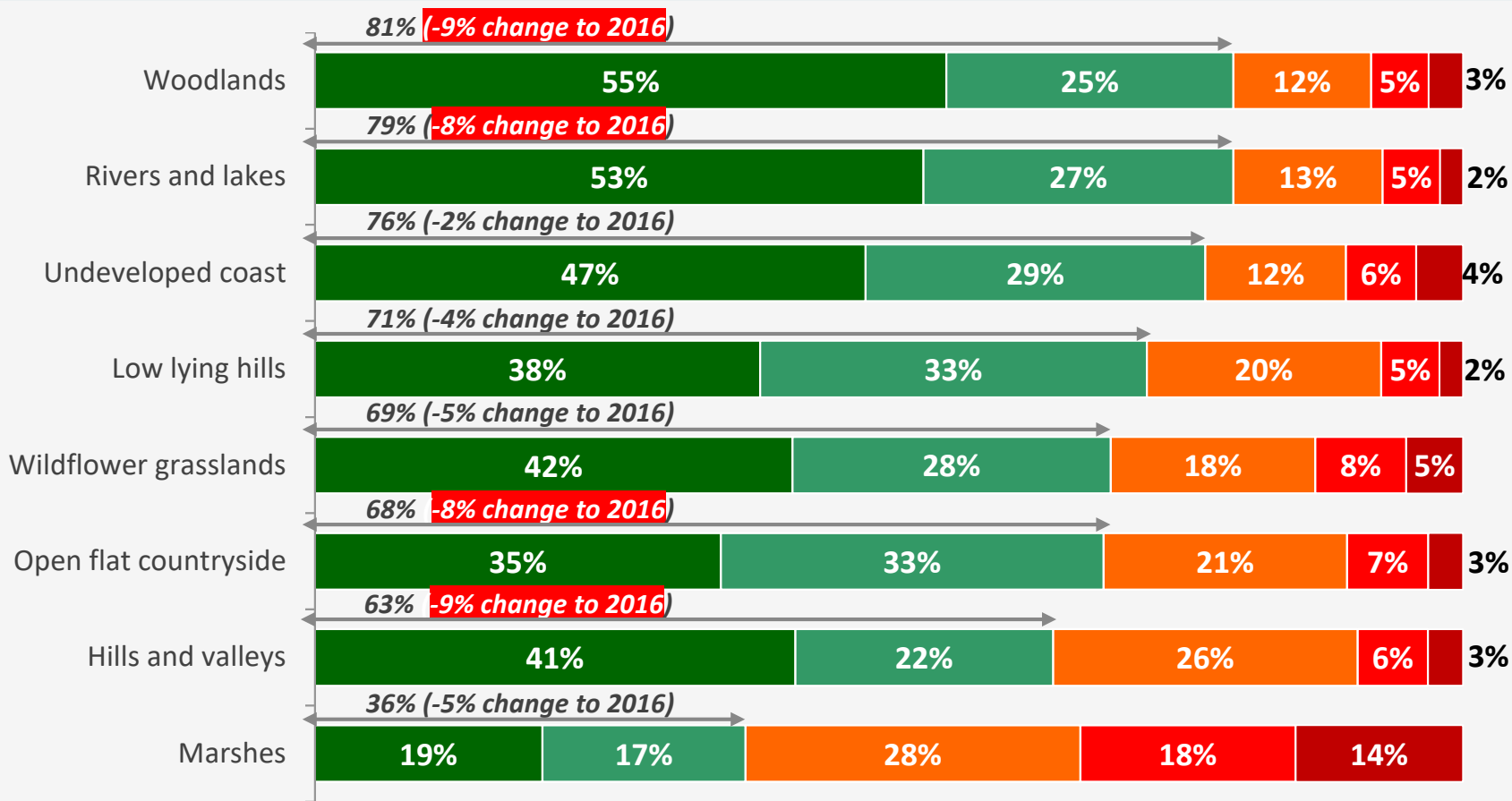
Importance of Kent Countryside versus condition rating

A comparison of importance & condition ratings reveal the following demographic groups: those aged 65 & over, non working, female & rent their property consider the countryside very important but score it lower in terms of condition.



Appeal of elements of the Countryside

Woodlands and rivers & lakes remain the most appealing elements. The appeal of wildflower grasslands and hills & valleys has reduced compared to 2016, following a reduction from 2014 levels.



1 = Very appealing 2 3 4 5 = Not at all appealing

Q7. Can you tell me how appealing the following parts of the Kent countryside are to you?

Appeal of elements of the Countryside by age



There are distinct differences in appeal by age. Appeal is generally lower amongst 16-24 year olds across the board.

Consistent with 2016 results, wildflower grasslands are more appealing to those 65 & over and open flat countryside is more appealing to those aged 25-44. Undeveloped coast is more appealing to those aged 25-44 and 45-64.



% selecting 1 = Appealing or 2

| AGED 16-24 |
|-----------------------------|
| Woodlands – 77% |
| Rivers & lakes – 73% |
| Undeveloped coast – 68% |
| Open flat countryside – 61% |
| Wildflower grasslands – 59% |
| Low lying hills – 57% |
| Hills & valleys – 56% |
| Marshes – 23% |

| AGED 25-44 |
|-----------------------------|
| Woodlands – 83% |
| Rivers & lakes – 83% |
| Undeveloped coast – 82% |
| Open flat countryside – 80% |
| Low lying hills – 78% |
| Wildflower grasslands – 66% |
| Hills & valleys – 57% |
| Marshes – 30% |

| AGED 45-64 |
|-----------------------------|
| Woodlands – 84% |
| Rivers & lakes – 83% |
| Undeveloped coast – 82% |
| Wildflower grasslands – 73% |
| Low lying hills – 73% |
| Hills & valleys – 69% |
| Open flat countryside – 64% |
| Marshes – 46% |

| AGED 65 AND OVER |
|-----------------------------|
| Woodlands – 76% |
| Wildflower grasslands – 75% |
| Rivers & lakes – 74% |
| Low lying hills – 69% |
| Hills & valleys – 69% |
| Undeveloped coast – 67% |
| Open flat countryside – 61% |
| Marshes – 41% |

Significantly higher % than other age groups

Q7. Can you tell me how appealing the following parts of the Kent countryside are to you?

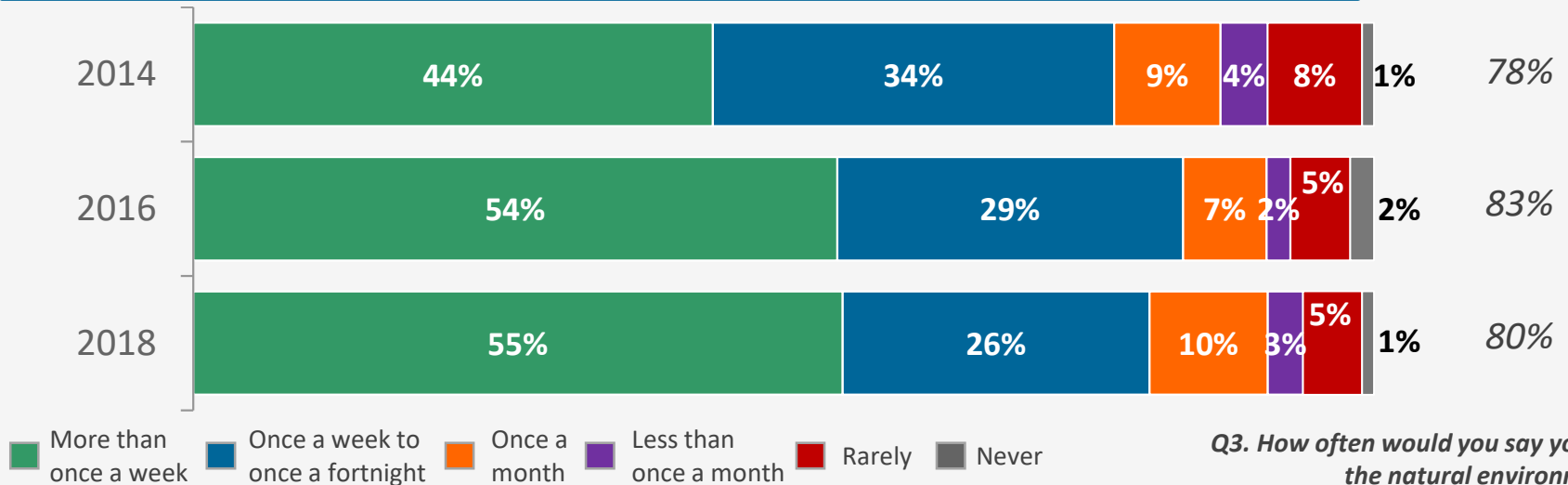
Usage of the natural & historic environment



Claimed usage of natural environment

80% use the natural environment at least once a fortnight. The proportion using more than once a week is consistent with 2016.

Net: more than once a week - once a fortnight

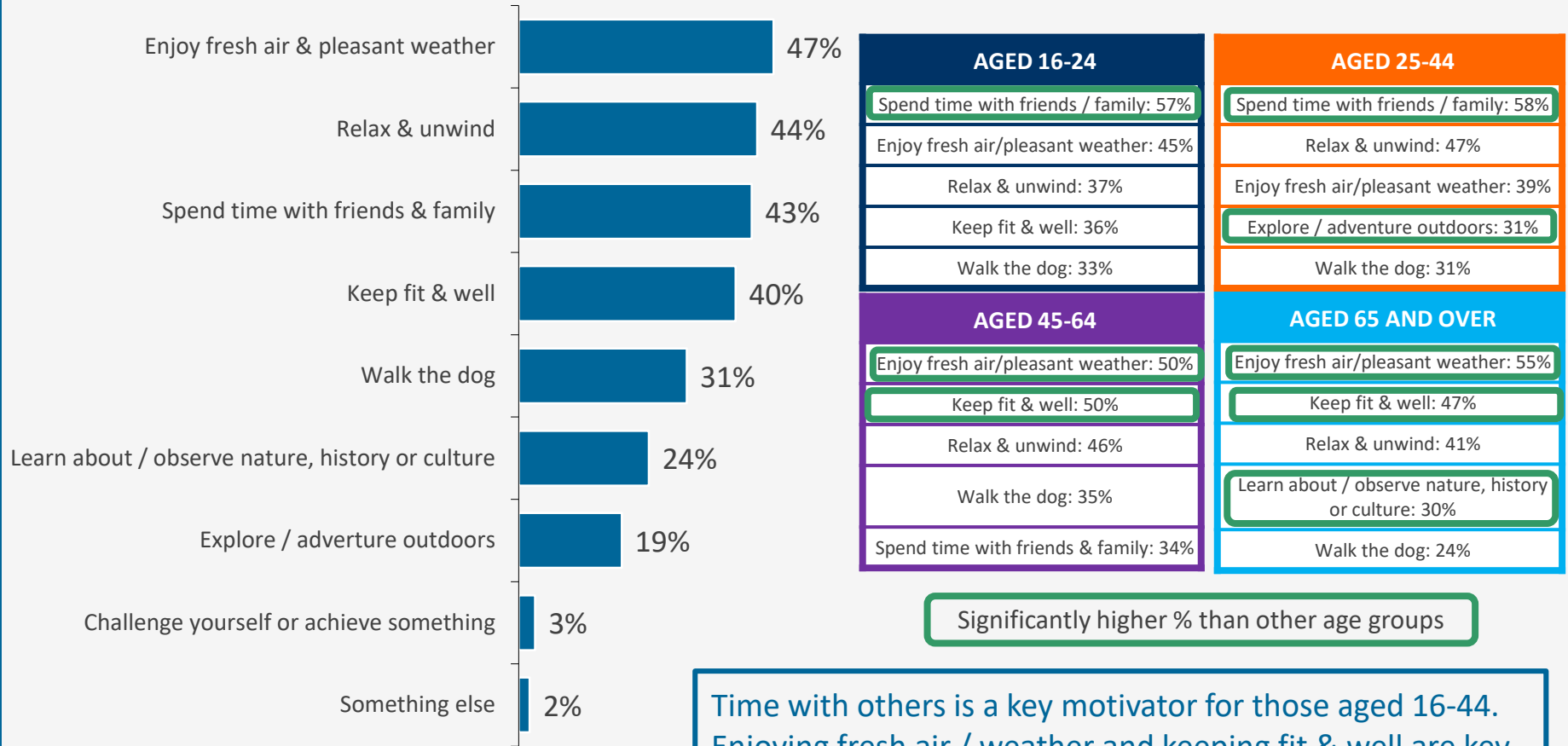


A lower proportion of those aged 65 & over indicated they frequently use the natural environment compared to 2016. Usage is significantly lower than other age groups in both years. Frequent usage is also significantly higher amongst males (85% vs. 77%).

| % MORE THAN ONCE A WEEK – ONCE A FORTNIGHT | Aged 16-24 | Aged 25-44 | Aged 45-64 | Aged 65+ |
|--|------------|------------|------------|----------|
| 2016 | 80% | 90% | 81% | 75% |
| 2018 | 86% | 87% | 82% | 65% |

Main motivations for using natural and historic environment

Consistent with reasons for valuing the countryside, the main motivations for using the environment is for enjoyment, relaxation, spending time with others & keeping well (all in broadly equal proportions overall).

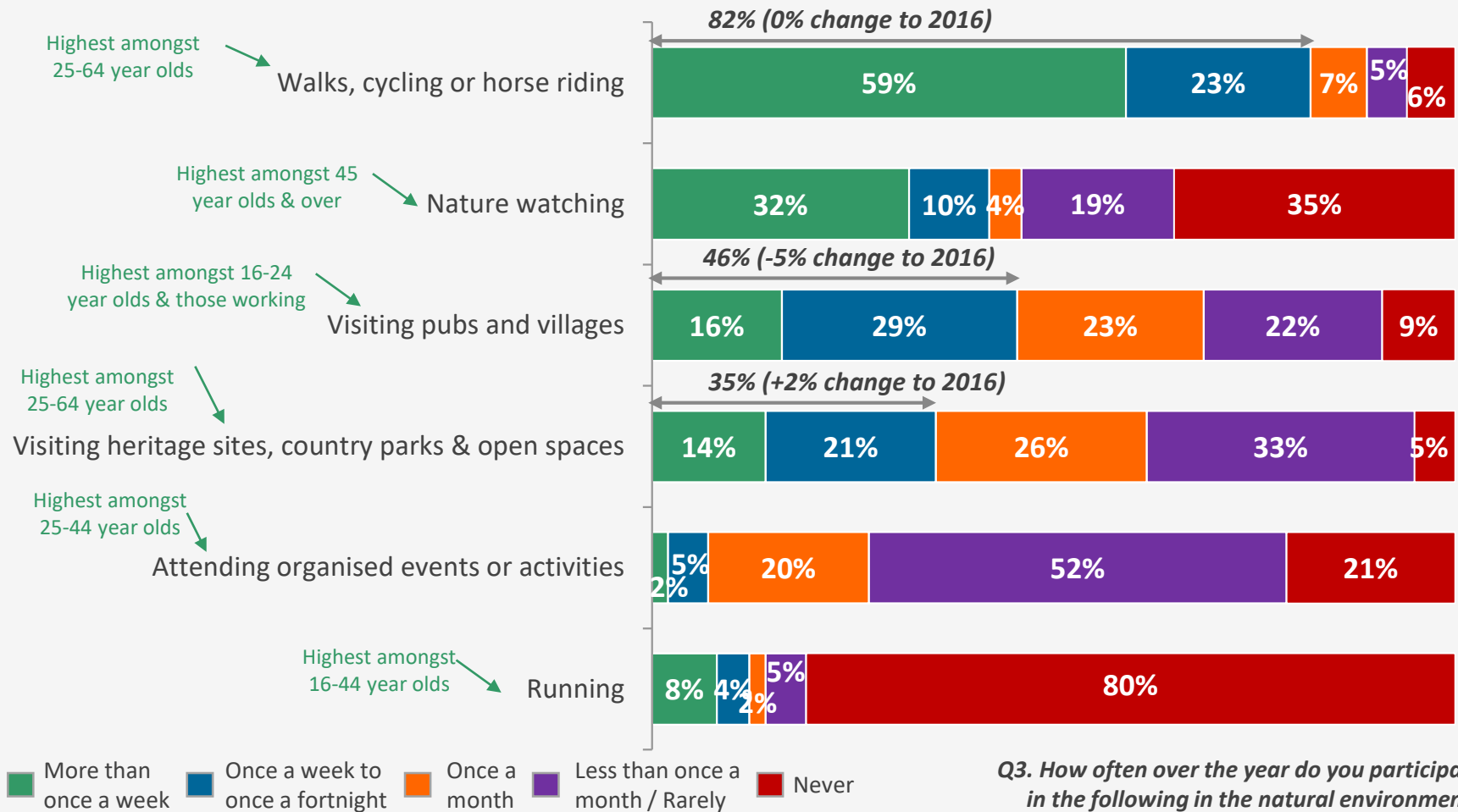


Time with others is a key motivator for those aged 16-44. Enjoying fresh air / weather and keeping fit & well are key motivators for those aged 45 & over.

Q5. What would you say are your main motivations for using the natural & historic environment?

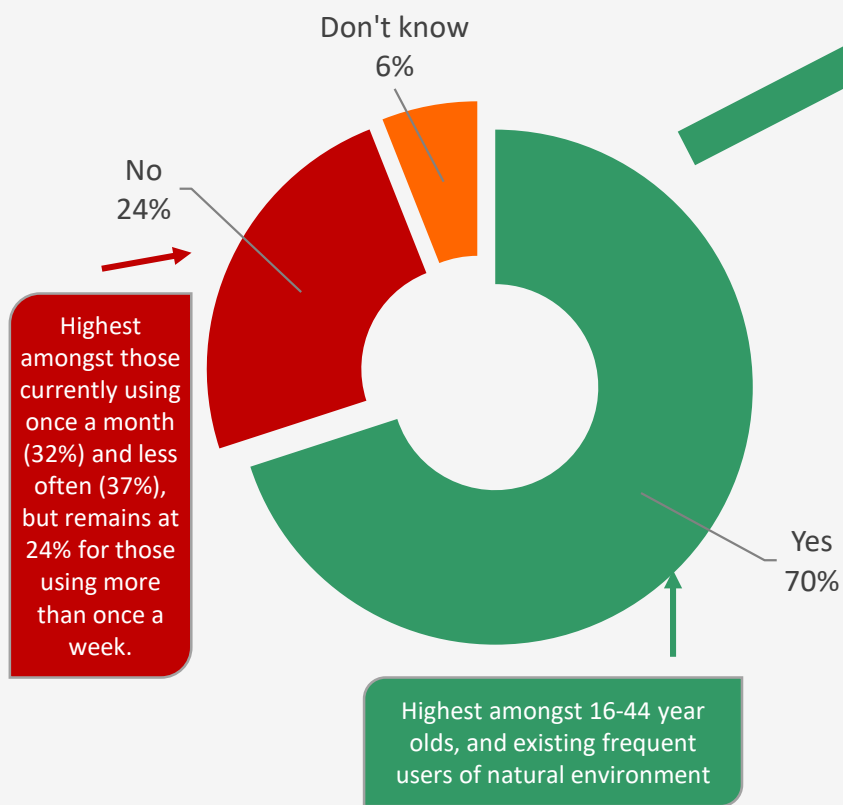
Type of use of natural environment

Nature watching and visiting pubs & villages are the two most common uses following walking, cycling or horse riding. Each activity is contrasting in terms of use by age with a higher proportion of those aged 45 & over nature watching more frequently and a higher proportion of those aged 16-24 visiting pubs & villages more frequently.



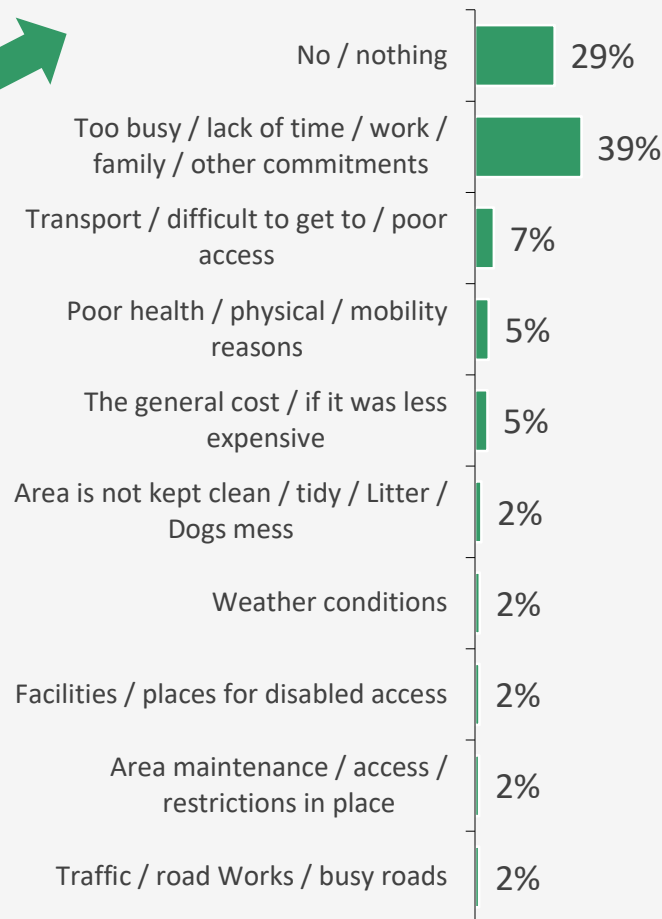
Consideration of using natural & historic environment more often or for other purposes

70% would consider using the environment more often or for other purposes. This increases to 82% amongst those aged 16-44.



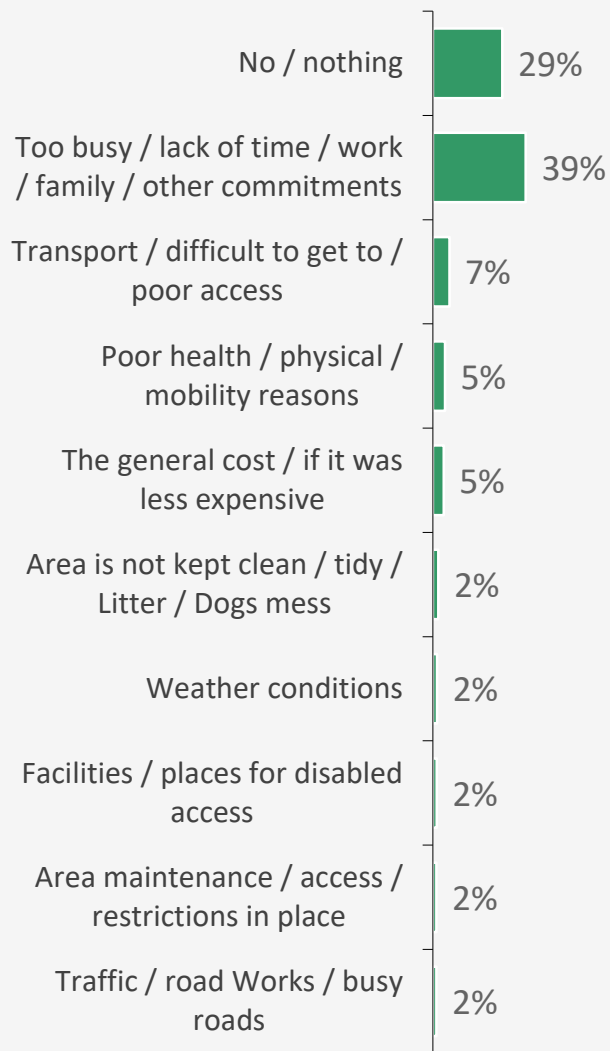
Q6a. Would you ever consider using the natural & historic environment more often or for other purposes in the future?

Other commitments / a perceived lack of time is the primary barrier preventing increased usage.



Q6b. Is there anything that prevents you from doing so?

Consideration of using natural & historic environment more often or for other purposes by age and current use



| % COMMENTING | Aged 16-24 | Aged 25-44 | Aged 45-64 | Aged 65+ | Use natural environment once a month |
|---|------------|------------|------------|----------|--------------------------------------|
| Too busy / lack of time / work / family / other commitments | 25% | 43% | 48% | 20% | 49% |
| Transport / difficult to get to / poor access | 7% | 6% | 4% | 14% | 3% |
| Poor health / physical / mobility reasons | 1% | 2% | 7% | 15% | 18% |
| Facilities / places for disabled access | 0% | 1% | 1% | 9% | 6% |

Significantly higher % than other age groups / other usage frequencies

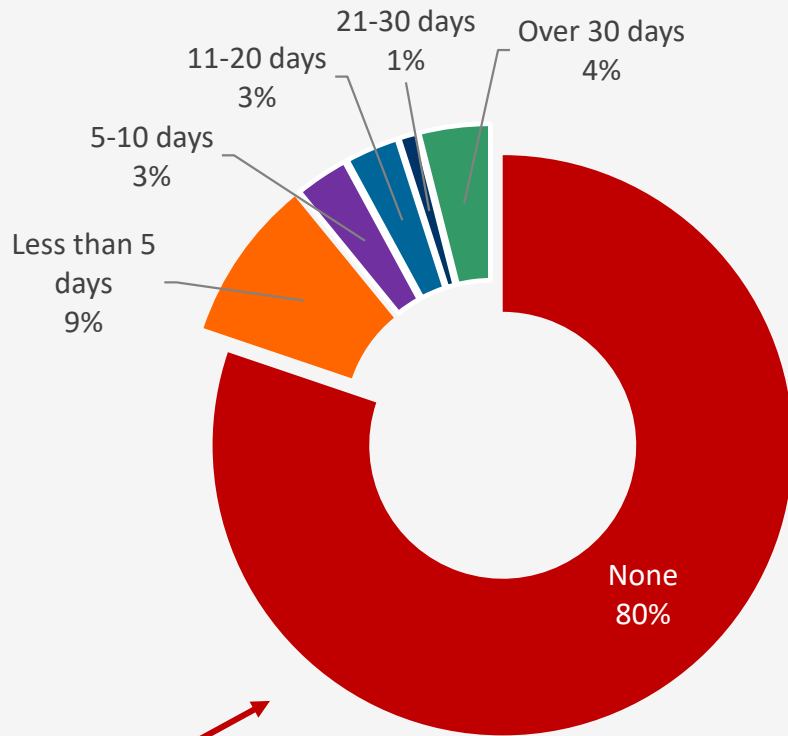
Other commitments / a perceived lack of time is particularly dominant for those aged 25-64. Whilst still the most common factor for those aged 65 & over, health, transport & access prevent a higher proportion of those aged 65 & over. Health & mobility is also cited as the second barrier for those who currently visit once a month.

Q6b. Is there anything that prevents you from doing so?

Volunteering in the natural environment



Time spent volunteering related to natural environment



Highest amongst those who use the natural environment once a month or less often

Q8. In the last year, how much time have you spent volunteering, or as part of a community group related to the natural environment?

20% have spent some time volunteering in the last year; 12% have spent up to 10 days and 4% have spent over 30 days volunteering.

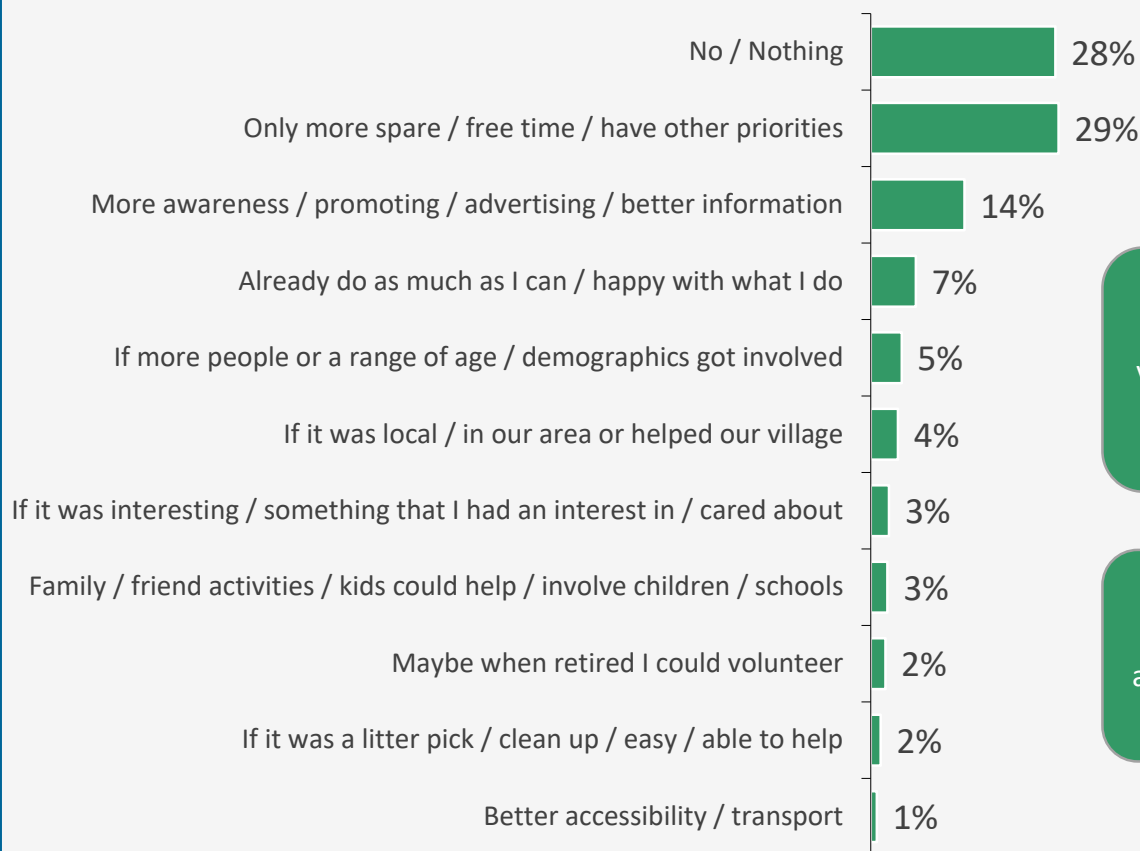
As perhaps expected, a higher proportion of those who use the environment once a month or less often have not spent any time volunteering in the last year.



Factors that would encourage more volunteering

- Amongst those currently volunteering.

28% indicated that nothing would encourage them to volunteer more than they currently do so. The two primary influencers for those who remain are circumstance, i.e. having more space / free time, and more awareness / promotion / information on the volunteer opportunities available.



“Not much, I already do what I can. I have to spend time with my family.”

“Yes. Better communication really. There are lots of groups about but they are not very well connected. I used to get involved with windmills but I do not hear much about what is going on.”

“If there was something that caught my imagination such as something to do with ancient crafts such as hedge row laying or dry stone walling, then I would be interested.”

Q9a. Is there anything that would encourage you to volunteer more, either more frequently or for longer?

Factors that would encourage volunteering

- Amongst those who do not currently volunteer.

28% indicated that nothing would encourage them to volunteer at all. The two primary influencers for those who remain are also circumstance and more awareness / promotion / information on the volunteer opportunities available. Interest and local proximity are also likely to influence.



"If I had more time. The fact that I am a carer for my husband limits my opportunities, but I would be willing to consider it anyway."

"More information. I am concerned about litter a lot. If there were organised activities to clear up certain areas, I would love to get involved."

"If a special project was suggested to me which was appealing, and was suitable for the time I had available."

"If I was more aware of what was going on. If there were local ones. We have a local newsletter they could be shown in there."

Q9a. Is there anything that would encourage you to volunteer more, either more frequently or for longer?

Environmental challenges & priorities



Biggest environmental challenge facing Kent

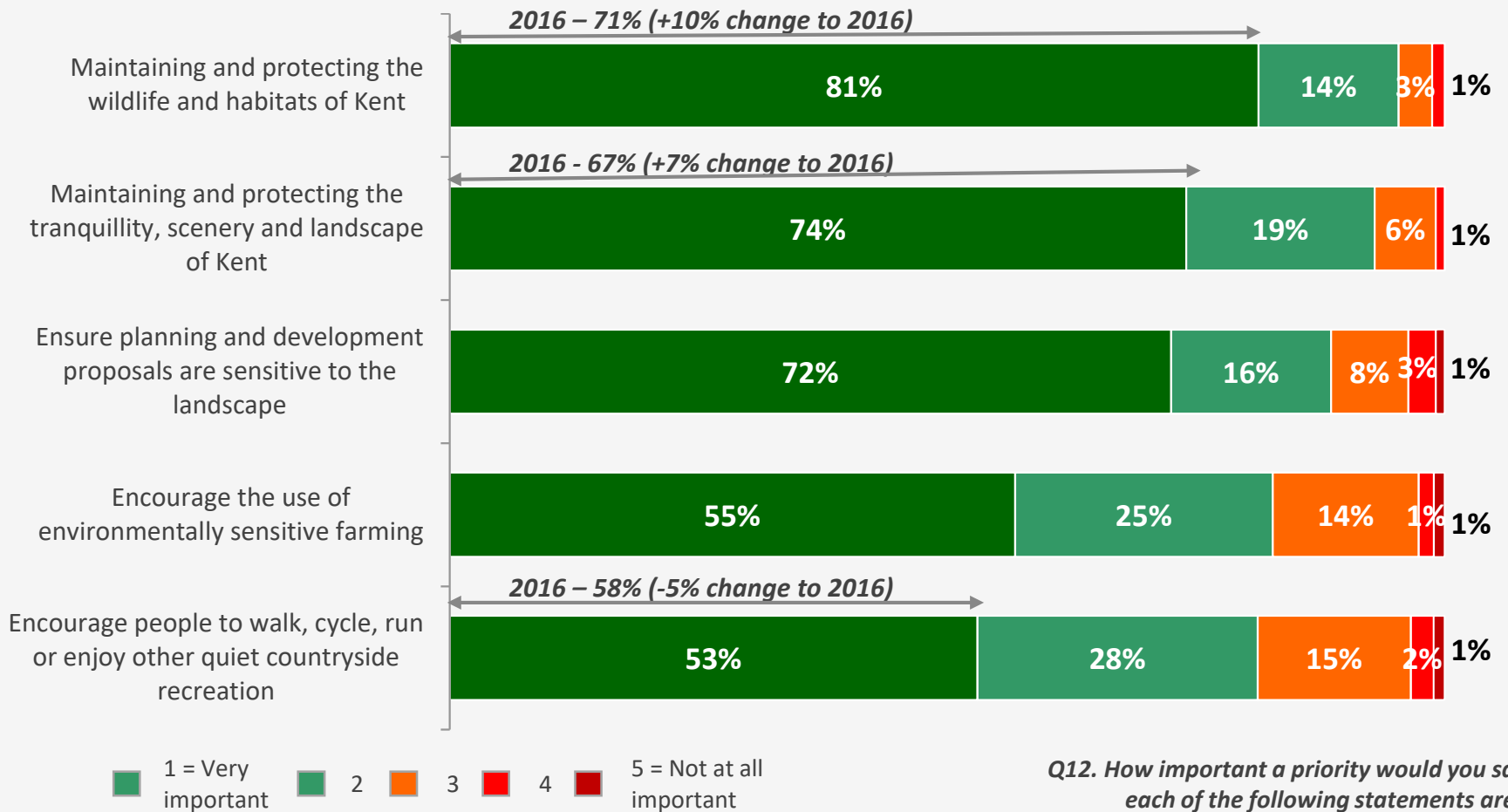
A number of challenges are cited but the primary challenges concern housing development, losing green belt land, litter & dogs mess and traffic & congestion. Litter & rubbish is more of a concern for 16-24 year olds and traffic & congestion is more of a concern for those aged 65 and over.



Q11 What do you think is the biggest environmental challenge facing Kent today?

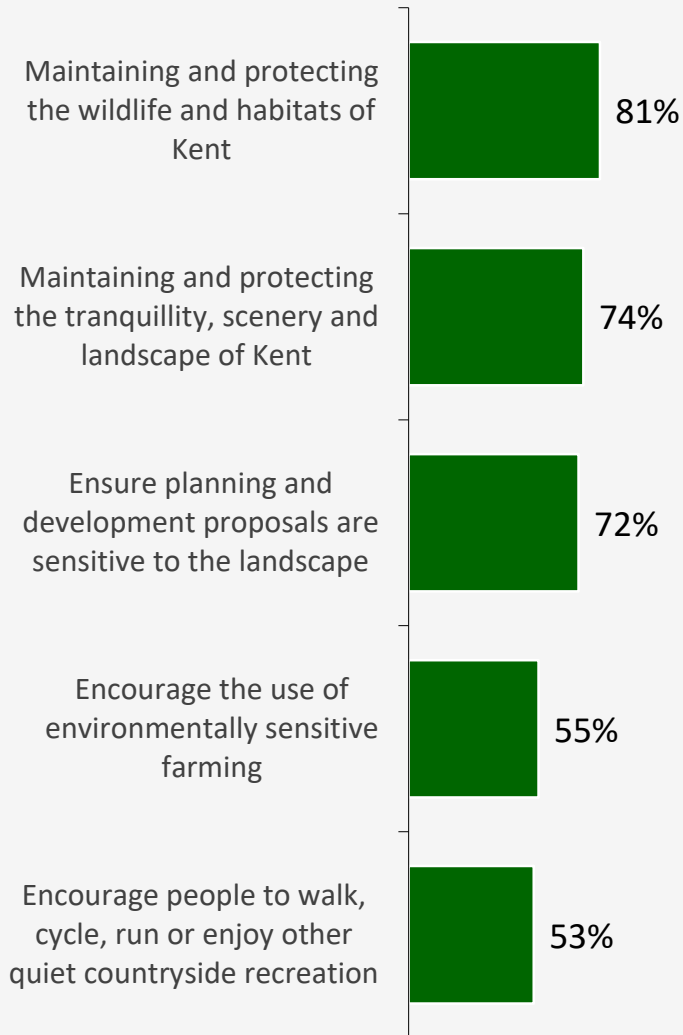
Environmental priorities

Maintaining & protecting wildlife & habitats and tranquillity, scenery & landscape are considered the highest priorities, and have increased in importance compared to 2016. Sensitivity of development proposals is also considered important by the majority.



Environmental priorities by age

% selecting 1 = Very important



| 1 – Very important | Aged 16-24 | Aged 25-44 | Aged 45-64 | Aged 65+ |
|---|------------|------------|------------|----------|
| Maintaining & protecting the tranquillity, scenery & landscape of Kent | 59% | 70% | 80% | 80% |
| Ensuring planning & development proposals are sensitive to the landscape | 45% | 68% | 84% | 82% |
| Encouraging people to walk, cycle, run, or enjoy other quiet countryside recreation | 42% | 48% | 55% | 65% |

Significantly higher % than other age groups

Maintain & protecting the tranquillity, scenery & landscape and ensuring development proposals are sensitive to the landscape (correlating statements) are particularly important to those aged 45 & over.

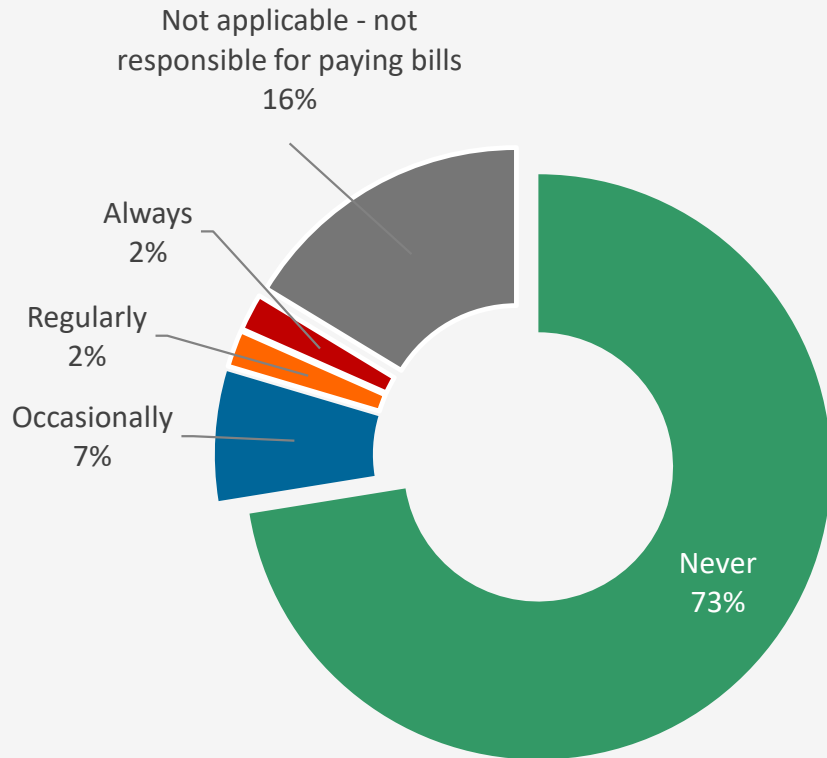
Encouraging people to walk, cycle, run or enjoy other recreation is more of a priority to those aged 65 & over.

Q12. How important a priority would you say each of the following statements are?

Attitudes towards and energy saving behaviours



Frequency of struggling to pay energy bills



11% struggle to pay energy bills at some point (occasionally, regularly, always)

Q17. How often would you say you struggle to pay your energy bills (or pre-payment meter)?

11% noted they struggle to pay their energy bills to some extent. Just under three quarters (73%) noted they never struggle to pay them.

The proportion who noted they struggle is highest amongst those aged 25-44 (15%) compared to the older age groups. The proportion who noted they struggle is particularly high amongst those rent their property (41%).

| % SELECTING | Aged 16-24 | Aged 25-44 | Aged 45-64 | Aged 65+ |
|--|------------|------------|------------|----------|
| Never | 15% | 75% | 88% | 88% |
| Struggle (occasionally, regularly, always) | 3% | 15% | 9% | 12% |
| Not applicable | 80% | 11% | 1% | 1% |

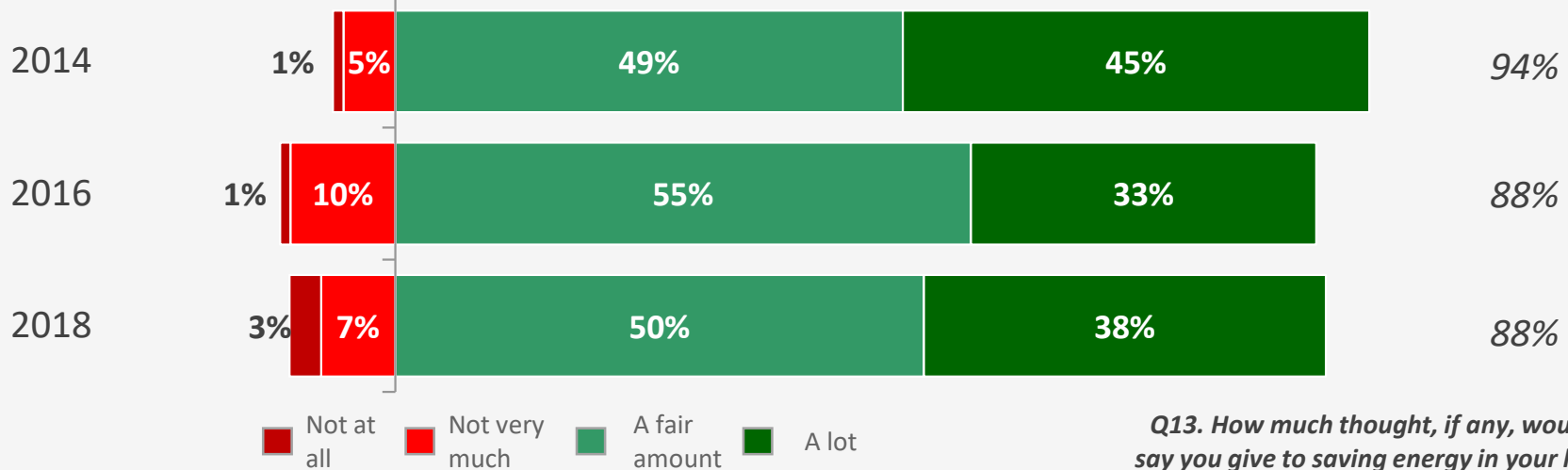
| % SELECTING | Own property | Rent property | Live with parents |
|--|--------------|---------------|-------------------|
| Never | 93% | 57% | 14% |
| Struggle (occasionally, regularly, always) | 7% | 41% | 3% |
| Not applicable | 0% | 2% | 82% |

Significantly higher % than other age groups

Thought given to energy saving

88% claim to give a lot or a fair amount of thought to energy saving in their home, consistent with 2016 results. Whilst this is lower than 2014 levels, this could be due to energy saving being part of everyday life now.

Net: A lot / a fair amount



The proportion who give a lot of thought is significantly higher amongst those aged 45 & over, as well as those who have responsibility for a property (i.e. those who own or rent a property).

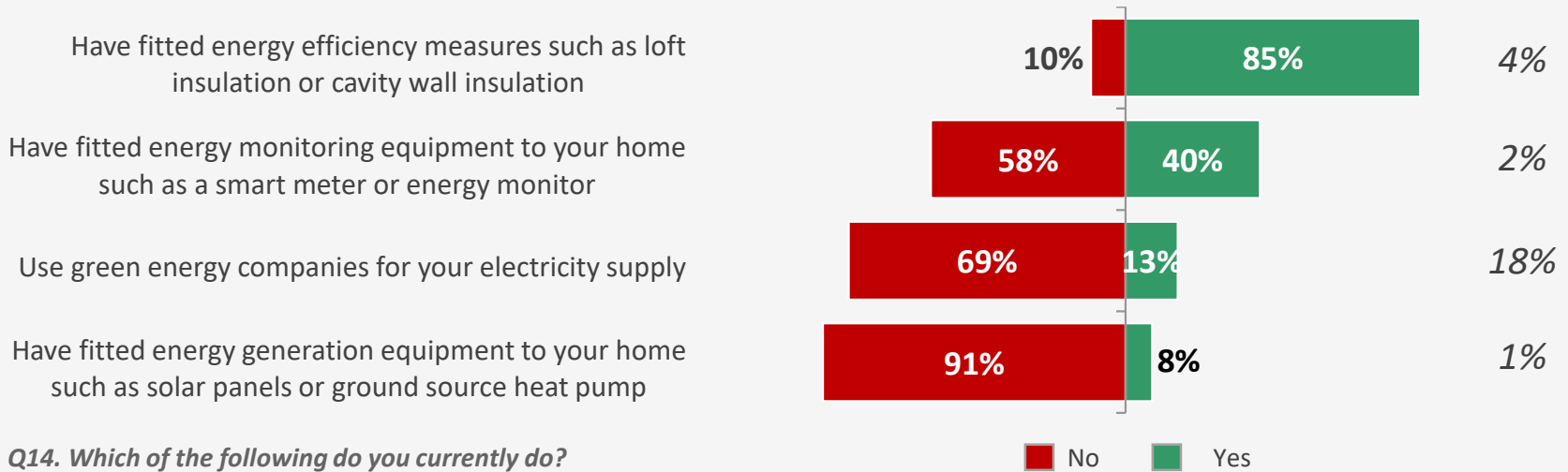
| % A LOT | Aged 16-24 | Aged 25-44 | Aged 45-64 | Aged 65+ |
|---------|------------|------------|------------|----------|
| 2016 | 15% | 32% | 41% | 36% |
| 2018 | 23% | 31% | 45% | 50% |

| % A LOT | Own property | Rent property | Live with parents |
|---------|--------------|---------------|-------------------|
| 2018 | 41% | 45% | 29% |

Energy efficient measures at home

The majority have fitted energy efficiency measures (85%), a small increase on 2016 proportions. 40% have fitted energy monitoring equipment such as a smart meter or energy monitor.

Don't know

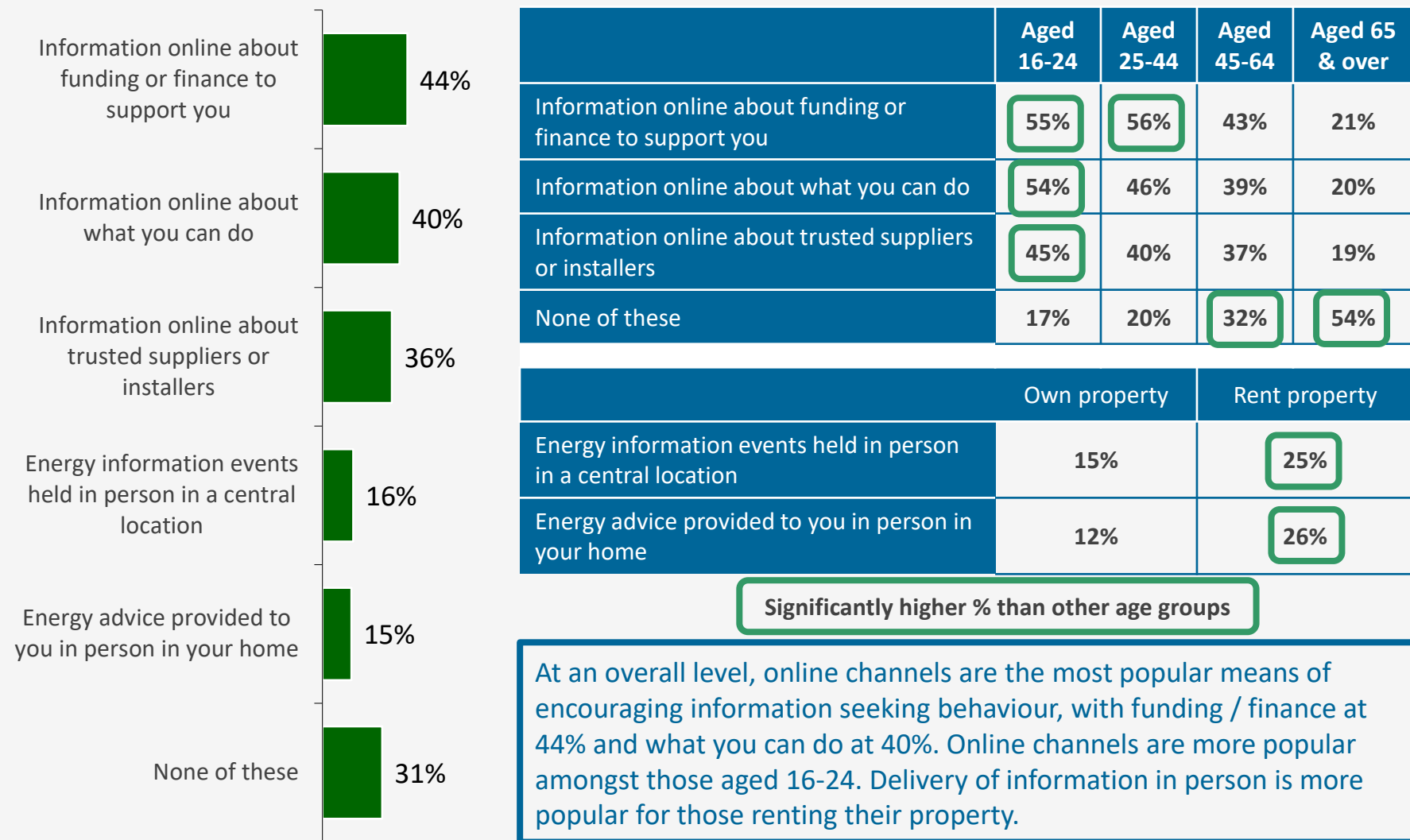


Use of green energy companies has reduced compared to 2016 (now 13%).

Fitted energy monitoring equipment is significantly higher in properties residents own compared to those who rent.

| % YES | Have fitted energy efficiency measures | Use green energy companies | Have fitted energy generation equipment |
|--------------------------------------|--|----------------------------|---|
| 2016 | 80% | 23% | 7% |
| 2018 | 85% | 13% | 8% |
| Own property | 91% | 16% | 8% |
| Rent property | 69% | 14% | 5% |
| Never struggle to pay energy bills | 90% | 15% | 8% |
| At time struggle to pay energy bills | 73% | 12% | 6% |

Information and advice that would encourage energy saving behaviour in the home



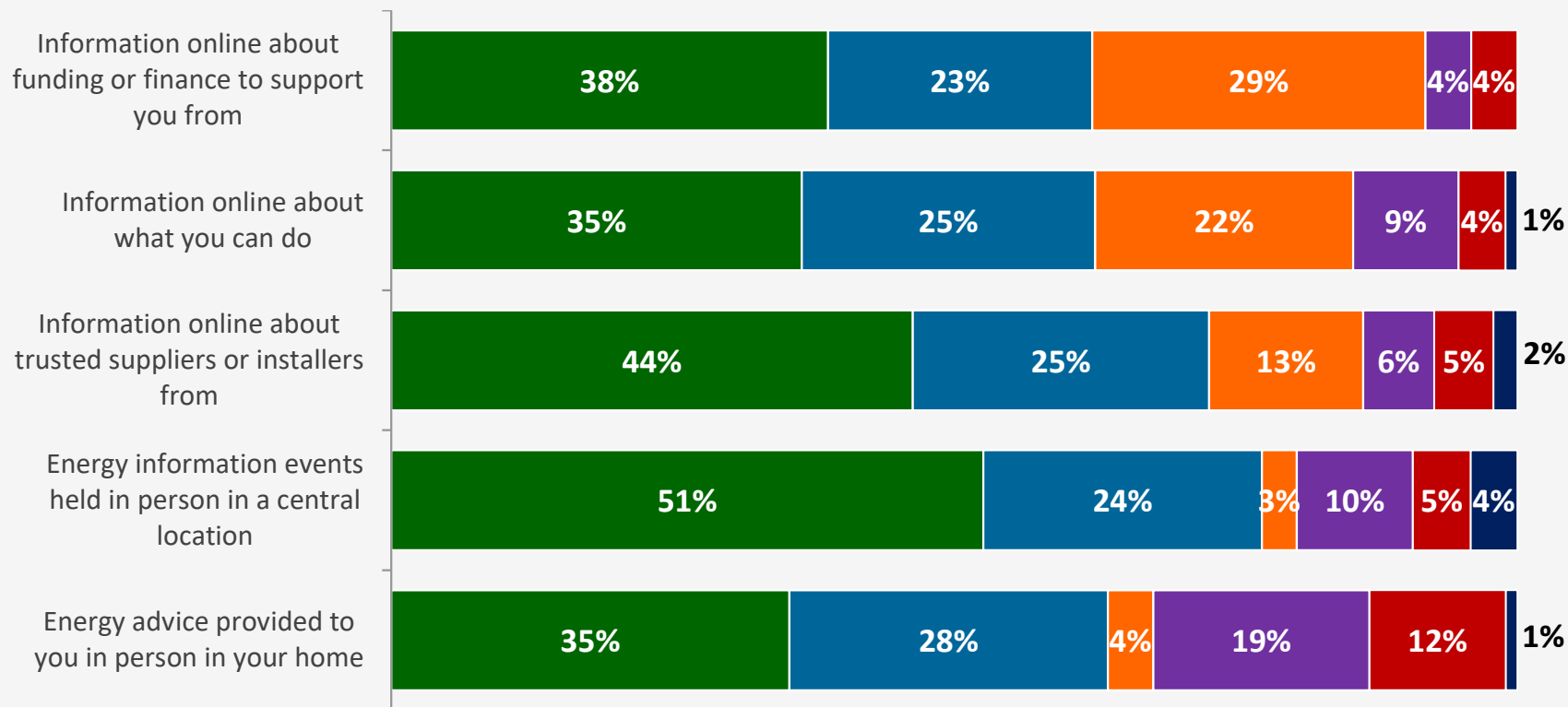
Significantly higher % than other age groups

At an overall level, online channels are the most popular means of encouraging information seeking behaviour, with funding / finance at 44% and what you can do at 40%. Online channels are more popular amongst those aged 16-24. Delivery of information in person is more popular for those renting their property.

Q15. Would any of the following encourage you to save more energy in the home or fit energy equipment?

Source of information and advice that would encourage energy saving behaviour in the home

Local Councils & the Independent Advice Service are the most preferred sources overall. Central government plays a preferred role in terms of funding / finance online support & what residents can do. Over half prefer their local Council to provide energy information events in person. Whilst base sizes are too low to report age differences, generally respondents aged 65 & over have a stronger preference for the Independent Advice Service. 16-24 year old respondents have a stronger preference for local Councils & central government.



Q16. Who would you prefer to get ...?

Key Findings

- Perceptions of personal importance of the countryside and the overall condition of the countryside have remained broadly consistent at an overall level in 2014, 2016 and 2018. The countryside is however increasing in value to residents with an observed increase in those considering it 'very important' (particularly amongst older age groups). Condition ratings amongst the 16-44 age group is lower versus 2016 but not significantly.
- When comparing the 'very important' scores against the top 2 score condition ratings, it is observed that there are demographic groups that consider the countryside to be very important but score it lower in terms of condition: aged 65 & over, non working, female & rent their property. These differences suggest that the condition of Kent countryside is variable and open ended feedback suggests that instances of housing development as well as maintenance in terms of litter / dog mess is having an affect on perceptions.
- Whilst small decreases in appeal have been observed in terms of types of countryside versus 2016, it is evident that the range of countryside available to residents remains important, and they appealing differently to the demographic groups surveyed.
- Frequency of use of the natural environment remains broadly consistent with 2016 levels. Frequency of usage is significantly lower for those aged 65 & over (consistent with 2016) and has reduced amongst this age group compared to 2016. Additional use could be encouraged by ensuring ease of site accessibility and use, promotion of the range of opportunities available and more emphasis on the health / mind benefits of countryside use.

Key Findings

- Consistent with reasons for valuing the countryside, the main motivations for using the environment is for enjoyment, relaxation, spending time with others & keeping well. Family time / socialising is more of a priority to those aged 44 and under and enjoyment of fresh air / weather and keeping fit and well is more of a priority to those aged 45 and over. These contrasting motivations should be considered in the future promotion of activities.
- The level of engagement in environmental volunteering activity remains broadly consistent with 2016 levels, 20% offer some degree of time. Lack of time / pressure of other commitments is one of the main barriers to engagement (both in terms of increasing time and engaging at all). As such, active promotion of ways to engage that are not too time consuming and are in the local interest will potentially increase interest.
- Maintaining & protecting wildlife & habitats and tranquillity, scenery & landscape are considered the highest of the prompted priorities put to residents. They have also increased in importance compared to 2016. Sensitivity of development proposals (a new and pertinent topic for this year's survey) is also considered important by the majority.
- Consistent with 2016 results, 88% claim to give a lot or a fair amount of thought to energy saving in their home. Whilst this is lower than 2014 levels, this could be due to energy saving being part of everyday life now and therefore not requiring additional consideration.

Key Findings

- Online channels are the most popular means of encouraging information seeking behaviour with regards to energy saving, particularly amongst those aged 16-24. Delivery of information in person is more popular for those renting their property.
- Local Councils & the Independent Advice Service are the most preferred information sources. Central government plays a preferred role in terms of funding / finance online support and what residents can do. Over half prefer their local Council to provide energy information events in person.

APPENDIX - Survey profile vs population statistics

| | 2011 Census Population statistics *1 | Survey profile |
|----------------------|--------------------------------------|----------------|
| GENDER | | |
| Male | 48% | 49% |
| Female | 52% | 51% |
| | | |
| AGE | | |
| 15 – 24 | 12% | 16% |
| 25 – 34 | 15% | 13% |
| 35 – 54 | 30% | 30% |
| 55 and over | 41% | 41% |
| | | |
| ETHNICITY | | |
| White | 93% | 93% |
| BME | 7% | 4% |
| Prefer not to answer | n/a | 3% |