

Theme 6:

Sustainable Economic Development

Overall:

FAIR

The indicators representing this theme are:

- **Indicator 16:** Affordable housing provision
- **Indicator 17:** Economic activity
- **Indicator 18:** Employment by type of industry

The recently adopted Local Development Plan has policies in place to ensure affordable housing targets are met (and draft supplementary planning guidance in the pipeline as well) and the Park continues to deliver more affordable housing than other National Parks in Wales. Therefore the condition of affordable housing provision in the Park is generally good.

There are both positives and negatives to the current condition of economic activity in the Park; therefore the current condition is fair. On the one hand, there are a higher percentage of economically active people in the Park when compared to Wales as a whole. This figure increased by 3.5% between 2001 and 2011. There are also fewer economically inactive people in the Park when compared to Wales as a whole (this figure decreasing by 3.5% between 2001 and 2011). However, the percentage of students in the Park decreased between 2001 and 2011 (while the corresponding percentage for Wales showed an increase) and the percentage of retired people in the Park is growing at a faster rate than in Wales as a whole.

There are also positive and negatives regarding employment type. There were decreases in agriculture, fishing and manufacturing but increases in construction and a new category 'Wholesale and retail trade; repair of motor vehicles and motor cycles' was formed which employs a very significant element of employment. There continues to be a high number of self-employed people in the Park. Generally this indicator is considered to be in fair condition.

Using these three indicators to assess overall condition (Poor, Fair, Good or Excellent), the state of the park in the context of Management Plan Theme 6 is FAIR.



Indicator 16:

Additional Affordable Housing

Affordable housing is provided for households who are unable to rent or buy on the open market. It is defined in the Local Development Plan as Social Rented Housing, Intermediate Housing and of a mix and tenure commensurate with local needs. The number of net additional affordable dwellings built in the National Park is included as an indicator in the Annual Monitoring Report for the Local Development Plan.

Additional affordable housing includes those housing units leased to provide accommodation for homeless families where the lease is for more than a year. Table AHI shows the total additional affordable housing provision in Wales between 2007/8 to 2014/15.

It shows that within the National Park areas, the highest number of additional affordable housing units delivered are usually within Brecon Beacons National Park, however in 2012-13 provision was highest in Snowdonia (39 out of 56 units). As in 2011-12, no affordable housing was delivered in Pembrokeshire National Park. The level of provision will be influenced by each National Park's affordable housing target.²²

The Brecon Beacons National Park mirrors the national trend regarding the percentage of additional affordable housing units delivered being at its lowest point in 2012/2013 since data collection began in 2007/2008, which reflected the continuing fall in wider new house building activity. The figure for the Park is planned to fall again in 2013/2014, with 15 additional affordable dwellings provided, and not pick up again until 2014/2015 when 20 additional affordable dwellings are proposed.

In order to meet targets, the recently adopted Brecon Beacons National Park Local Development Plan (LDP) sets out that the Authority will require development in the defined settlements to make a contribution towards affordable housing. In order to provide detail as to the implementation of this policy position, the Authority has produced draft Supplementary Planning Guidance (SPG) to Policy 28 of the Local Development Plan 'Affordable Housing'.



	Delivered:						Planned (b) 2013-14	Proposed (b) 2014-15
	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13		
Isle of Anglesey	77	116	79	85	49	110	41	37
Gwynedd	85	93	53	110	37	66	63	106
Conwy	26	49	60	76	32	45	186	128
Denbigshire	78	134	87	154	60	61	22	0
Flintshire	61	74	24	115	71	57	126	125
Wrexham	73	10	41	83	95	15	74	64
Powys	41	55	56	27	38	105	0	0
Ceredigion	45	34	38	47	(r) 119	15	52	136
Pembrokeshire	82	67	123	105	26	59	28	159
Carmarthenshire	86	80	186	86	92	87	40	150
Swansea	102	299	124	104	297	129	401	450
Neath Port Talbot	35	81	138	100	83	140	152	90
Bridgend	127	110	101	140	120	30	123	183
The Vale of Glamorgan	18	11	68	140	48	73	42	204
Cardiff	256	459	488	362	417	329	233	217
Rhondda Cynon Taf	89	117	103	86	40	84	97	106
Merthyr Tydfil	21	50	65	73	31	66	52	25
Caerphilly	95	203	170	160	108	144	140	276
Blaenau Gwent	11	70	33	75	122	116	41	54
Torfaen	99	71	92	88	92	58	183	153
Monmouthshire	76	101	26	167	191	85	91	205
Newport	109	259	215	103	264	168	36	26
Wales	1,692	2,543	2,370	2,486	(r) 2,432	2,042	2,223	2,894

Of which, total delivered in:

Snowdonia National Park	6	14	16	8	5	39	22	26
Pembrokeshire National Park	8	15	12	3	0	0	0	0
Brecon Beacons National Park	16	25	35	20	27	17	15	20
Total National Parks	30	54	63	31	32	56	37	46
Total outside National Parks	1,662	2,489	2,307	2,455	2,400	1,986	2,186	2,848
Wales	1,692	2,543	2,370	2,486	(r) 2,432	2,042	2,223	2,894

Table AH 1: Additional Affordable Housing Provision in Wales
(Source: Affordable Housing Provision data collection, WG)²³

²³ <http://wales.gov.uk/docs/statistics/2013/131106-affordable-housing-provision-2012-13-revised-en.pdf>

Indicator 17:

Economic Activity

As well as delivering their role as environmental stewards, the National Parks in England and Wales simultaneously have a duty to 'seek to foster the economic and social wellbeing of local communities within the National Parks'. National Parks are vital economic assets that make a significant contribution to prosperity and well-being, sustaining jobs in the management of the natural environment, supporting businesses involved in farming, food, forestry, tourism, and the production and marketing of locally distinctive, organic and nature based products and services and providing attractive locations for people and businesses. There is an increasingly important role for the care sector to play supporting local employment, especially considering the employment table on page 79, which shows that the highest single area for employment is health and social care at over 14%.

National Parks deliver ecosystem services on which our wider economy and society depends, such as providing clean water, influencing water supply and flood risk, regulating climate and air quality, and providing attractive semi-natural landscapes in which people can relax and exercise, helping to improve our health and well-being. They also play an important historic, social and cultural role, supporting education, contributing to our sense of place, and providing a focus for community engagement and volunteering.

Environmental protection and economic wellbeing are often considered to be conflicting aims. However, there is increasing recognition and increasing numbers of scientific studies that show that large parts of the modern economy are dependent on the quality and sustainable use of the environment.²⁴

Table EAI identifies employment in the environmental sector within Wales' National Parks. Some of these sectors may not be wholly attributed to the environment and therefore in order to understand their contribution to the statistics on employment in the Environmental section it is necessary to estimate the proportion of activity within different sectors which is dependent on the environment.



	Brecon Beacons National Park	Pembrokeshire Coast National Park	Snowdonia National Park	Total
Agriculture, forestry, fishing and mining	1,445	1,018	1,539	4,001
Electricity	83	77	54	215
Retail trade	726	474	406	1,606
Accommodation and travel agents	586	831	1,072	2,489
Restaurants and bars	370	619	382	1,371
Recreation and culture	688	238	273	1,199
Water, sewerage and waste	133	22	356	511
Land transport	43	47	43	133
Public administration and defence	705	206	334	1,246
Total	4,779	3,532	4,459	12,771

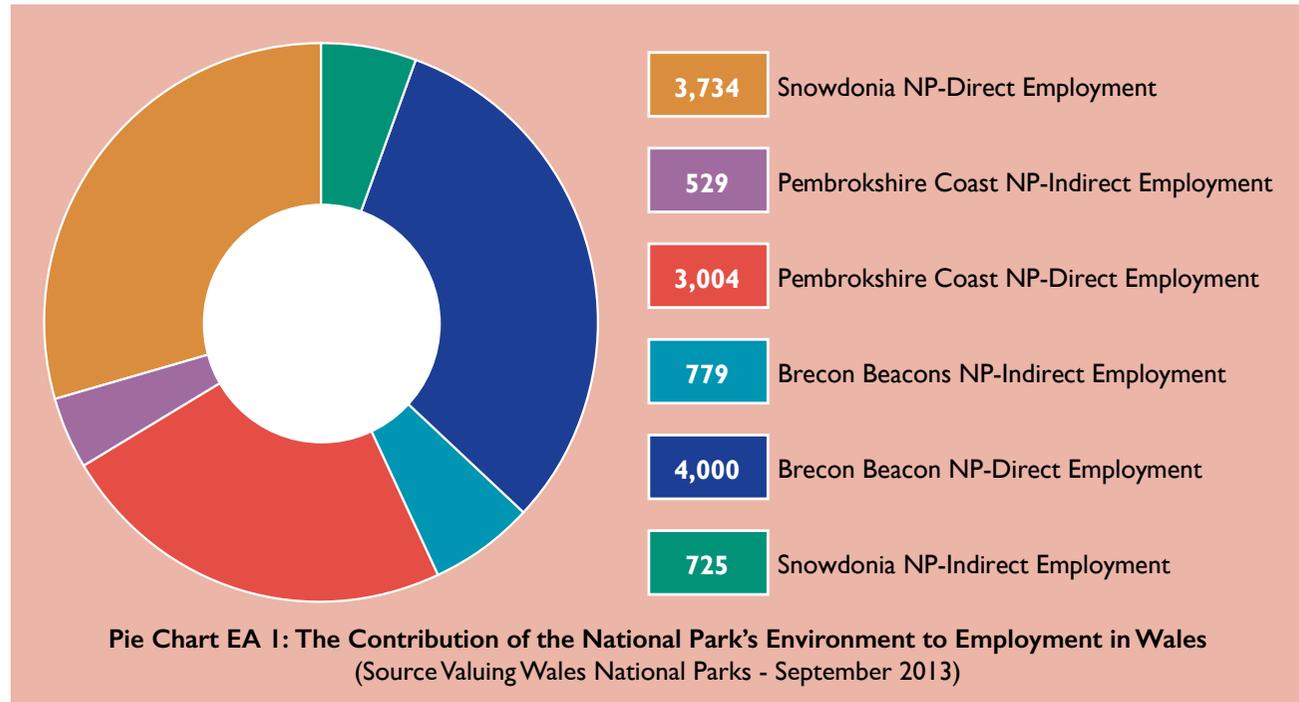
Table EA 1: Employment in the Environmental Sector within Wales' National Parks



The three National Parks are a significant part of the Welsh Economy. Overall, the National Park economies account for £557m of GVA, representing 1.2% of the Welsh economy.²⁵

Economic activity that is concerned with the protection or management of the environment, or that is dependent in some way on the environment supports 10,738 jobs directly within the National Park boundary and a further 2,033 jobs across Wales.

This activity generates 0.7% of Wales total GDP. This excludes the impact of the spending of National Park visitors in other parts of Wales. Chart EA1 below identifies the contribution of the National Park's environment to employment in Wales.



Graph EA1 provides a profile of the Welsh National Park Economies. It compares Welsh National Park and Wales data. It shows that there are significant differences by proportion of jobs per sector in each of the National Parks.

However, Brecon Beacons National Park and Wales are the most comparable data sets with the major differences being that the National Park provides slightly more employment in wholesale, retail, hotels and restaurants and noticeably more employment in primary industries and utilities.

The National Park as an area provides slightly fewer jobs in public administration, defence, transport, communications and manufacturing and construction.

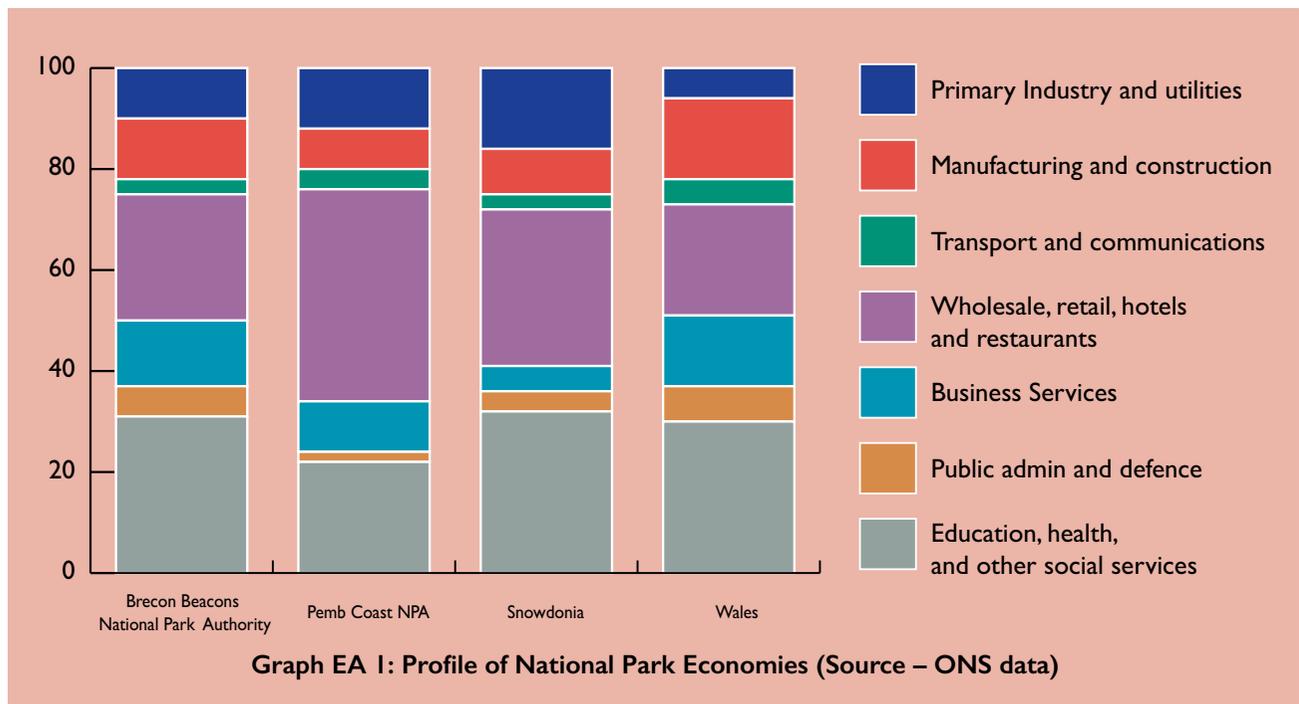


Table EA 2 develops the indicator used in the 2006 State of the Park Report. It compares economic activity data from the 2011 Census making comparisons between Wales and the Brecon Beacons National Park. It is particularly useful because it provides comparative data from 2001. It shows a higher percentage of economically active people in the Brecon Beacons National Park than in Wales as a whole. The percentage figure for self-employed people that live in the National Park is almost double that in Wales and there are a significantly lower percentage of unemployed people in the Park. There are, however a higher percentage of students and employees in Wales as a whole compared to National Parks.

Table EA 2 shows a smaller percentage of people in the Brecon Beacons National Park that are economically inactive yet there is a higher percentage of retired people in the Park (retired people are classed as economically inactive). The number of retired people in the Park increased between 2001 and 2011 and the number of students slightly decreased. The number of retired people in Wales as a whole also increased, although this was not as pronounced as the equivalent Park figure. The number of students in Wales as a whole increased between 2001 and 2011.

all figures in %	Brecon Beacons National Park Authority		Wales	
	2001	2011	2001	2011
Economically Active	65.2	68.7	61	65.8
Employees	45.7	47.4	47.5	49.5
Self Employed	15.2	16	7.7	8.6
Unemployed	2.7	3.1	3.5	4.3
Full time Student	1.6	2.2	2.3	3.3
Economically Inactive	34.8	31.3	39	34.2
Retired	16	18.8	14.8	16.1
Student	4.3	4.2	5.1	6
Looking after the home/family	5.2	2.7	6.4	3.8
Permanently Sick/Disabled	6.8	4	9.2	6.3
Other	2.5	1.6	3.5	2

Table EA 2: Economic Activity Brecon Beacons National Park/Wales



25 http://www.nationalparkswales.gov.uk/_data/assets/pdf.file/0009/389727/Valuing-Wales-National-Parks-.pdf

© Philip Veale - Brecon - Sugar Loaf taken from Bwlch

Indicator 18:

Employment by Type of Industry

Proportion of people ages 16-74 working in:	1991		2001
Agriculture and fishing*	10.2%	▶	7.3%
Energy and water	2.6%	▶	1.2%
Manufacturing	10.1%	◀	10.8%
Construction	6.4%	◀	7.1%
Distribution, hotels and restaurants**	17.8%	◀	20.9%
Transport and communication***	4.1%	▶	3.7%
Banking, finance and insurance	7.5%	◀	10.5%
Public administration, education and health †	-		33.1%
Other services ††	37.4%		5.3%
Not stated †††	2.0%		-
Total	98.1%		99.9%

Source 1991 census; 2001 census Digest of Welsh Local Area Statistic 2004

Table ET1: Employment by Type of Industry

Table ET1 identifies employment by type of industry in the National Park between 1991 and 2001. Data from the 2011 Census is offered below for comparison. The categories of employment industry have changed over time but provide useful trend data for types of employment of residents of the National Park.

Table ET1 identifies the Employment by type of Industry data that was used in the 2006 State of the Park Report. Future Census data and mid-year forecasts will enable this indicator to be updated using a consistent data set.

* Includes forestry in 1991. Forestry not mentioned in 2001

** Distribution and catering in 1991

*** Transport only in 1991

† Not specified in 1991, but presumably included in other services

†† Presumably 1991 figure includes public administration etc.

††† No category for not stated in 2001

Generally the data shows that there have been further decreases in employment in agriculture and fishing (including forestry in 2011 data) and a decrease in manufacturing employment following an increase between 1991 and 2001. There has been a further increase in construction employment. It is difficult to identify a trend in accommodation and food services as it is a new category. However, going forward this change will provide valuable trend data in an important employment category for Park residents.

The Park's main employment categories have been divided further since the 2006 State of the Park Report was produced but generally continues to show greatest employment in public administration, defence and education with two new categories identified in 2011 Census of the wholesale and retail trade and human health and social work. This is probably the result of a number of larger employers based in the National Park. Powys County Council has offices in Brecon (in the National Park) along with the divisional headquarters of Dyfed-Powys Police, the Ministry of Defence and the National Park Authority itself. There are three secondary schools and a number of primary schools in the Park and several nearby plus the Brecon War Memorial Hospital and other hospitals nearby. There are approximately 15 care homes located within the park and in excess of 30 within close proximity to the park.

2011 Census Data:

Total Persons working – 15,889

Agriculture Forestry and Fishing	5.9%
Manufacturing	6.5%
Construction	8.2%
Wholesale and retail trade; Repair of motor vehicles and motor cycles	3.4%
Transport and Storage	2.5%
Accommodation and food services	7.5%
Information and Communication	1.9%
Financial and insurance activities	1.5%
Real Estate	1.4%
Professional, scientific and technical	5%
Administrative and support services	4.2%
Public administration and defence, compulsory social security	9.7%
Education	10.6%
Human Health and social work	14.6%
Other	5.3%

Between 1991 and 2001 the number of people employed in agriculture and fishing decreased from 10.2% to 7.3%. By 2011 this number had reduced further to 5.9% (including forestry).

Between 1991 and 2001 the number of people employed in manufacturing had increased from 10.1% to 10.8%. By 2011 this number had decreased to 6.5%.

Between 1991 and 2001 the number of people employed in construction had increased from 6.4% to 7.1%. By 2011 this number had increased further to 8.2%.

The category for 'Transport and Communication' changed in 2011 to 'Transport and Storage'. The numbers employed in this category decreased from 4.1% to 3.7% between 1991 and 2001 and decreased further by 2011 to 2.5%.

The numbers employed in the category 'Distribution, Hotels and Restaurants' increased between 1991 and 2001 from 17.8% to 20.9%. In 2011 the category changed to 'Accommodation and Food Services' (losing the distribution element of the category) and numbers decreased to 7.5%. It is worth noting that 2011 Census data includes a new category 'Wholesale and retail trade; repair of motor vehicles and motor cycles' which wasn't included in the 2006 SOPR yet forms a significant part of employment in the National Park at 13.4%.

It is worth noting that there are a variety of other changes in the categories used between 1991, 2001 and 2011 Census data which provide minor employment in the Park. The State of the Park Report picks up major changes in employment trends.

