



Arsyllfa **Wledig** Cymru  
Wales **Rural** Observatory

## Rural Household Survey

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## SECTION 1

## INTRODUCTION AND METHODS

### Introduction

1.1 This report provides an overview of results from a survey of households in rural Wales undertaken for the Wales Rural Observatory [WRO] during 2007. Including this introduction and methodology the report is structured into eight sections, which address the following issues: Population and Migration, Community, Well-Being and Welfare, Local Services, Employment, and Environment. Key findings are presented at the end of each section.

1.2 Findings are presented for rural Wales as a whole. In addition the report explores variations according to gender, age, income, social class, geography, length of residence, economic activity and employment status, household tenure, and nationality.

1.3 The definition of rural adopted throughout this report follows the definition used in the Welsh Assembly Government's Consultation on the Draft Rural Development Plan for Wales 2007 – 2013. Broadly, under this definition Wales is classified into:

Rural Wards – having solely or predominantly rural or small town population profile.

Service Centre – having urban population profile with strong links to surrounding rural areas.

Host ward – having a large town population profile and playing a key role in surrounding rural areas.

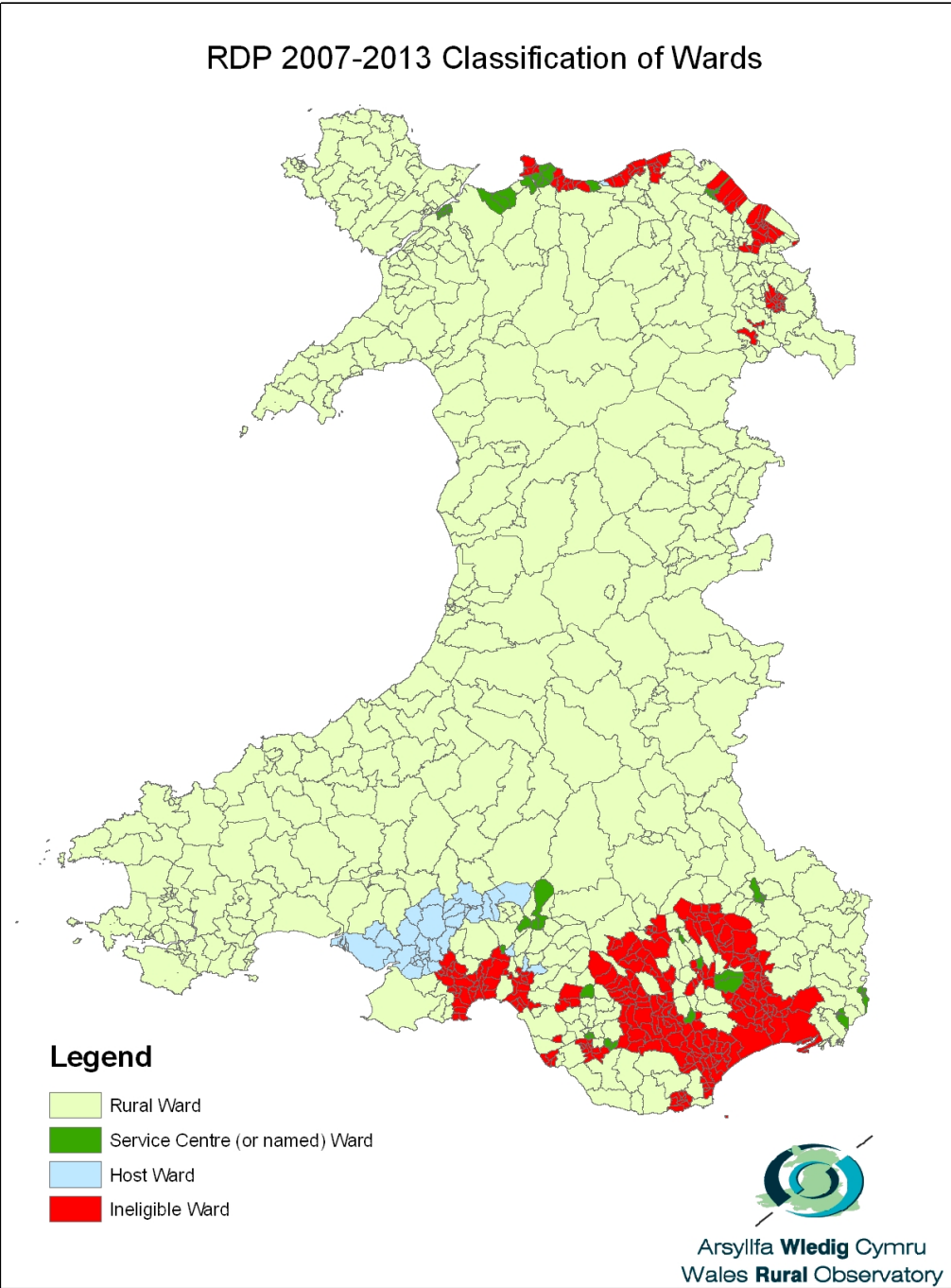
Ineligible ward – having only a large town population profile that has no or limited links with rural areas.

A map of Wales showing the distribution of these classifications is at Figure 1.1.



Figure 1.1: Map showing Classification areas in Wales. Source: Welsh Assembly Government (2006)

Rural Development Plan 2007 -2013 Classification



## Methods

1.4 Data were collected through a telephone survey of 4071 households across rural Wales and covered at least 9851 people. It was similar to a WRO survey conducted in 2004. The 2007 survey was designed by researchers at the Wales Rural Observatory. It was administered and conducted for the Observatory by GfK NOP Social Research, who also collated and provided initial cross-tabulation of the data. Researchers at the WRO analysed the data. The survey was carried out during May, June and July 2007.

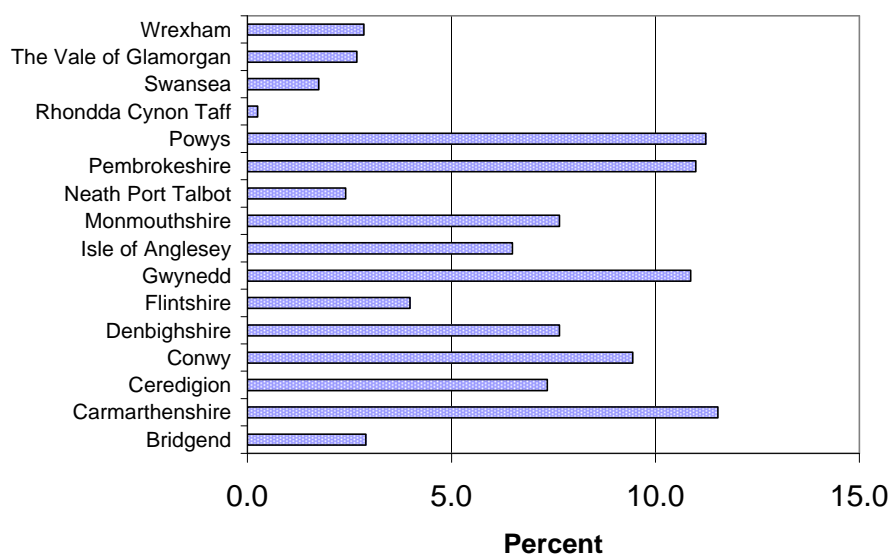
1.5 Respondents were asked about themselves, their households, and other individuals in the household, aged 16 and above. Questions were of three types. Respondents were asked to respond to a series of attitudinal statements; to provide factual data such as household income; and to answer open-ended questions that focused on perceptions of the local area. The telephone interviews lasted approximately 30 minutes. Interviewees were offered the choice of Welsh or English language.

1.6 The survey population included 1438 interviews with households that had participated in the 2004 research; the remaining 2633 household interviews were generated as a random sample. Figure 1.2 shows graphically the proportions of interviews done for each of the various areas of rural Wales.

Fig 1.2 illustrates the distribution of respondents across the different Unitary Authority areas that made up the geographical area of the sample. The numbers of interviews within each area were calculated according to the magnitude of the area's population.

1.7 The survey covered all types of rural settlement. Respondents were asked whether they considered where they lived to be: in a town or city; in a country village; or in a hamlet or open countryside. The results of this 'area self-definition' were: 38% of the survey population lived in a town or city; 49% lived in a country village; 10% lived in a property or farm in the country; and 3% did not define where they lived.

**Figure 1.2: Graph showing distribution of participants across the Unitary Authority Areas**



## SECTION 2

## POPULATION AND MIGRATION

### Introduction

In common with other rural areas in the UK, rural Wales has been subject to both population decline in some parts and net increase, resulting from substantial in-migration from cities and larger urban centres often by comparatively wealthy urban people, in others. Population migration is a complex process of flows constituted by three interacting components: natural change, out-migration, and in-migration.

In-migration to rural areas is perceived to have some beneficial effects such as countering rural out-migration; re-energising rural economies; and maintaining the requirement for services in rural areas. The perceived negative effects of rural in-migration include the dilution of rural culture and social capital; increases in the rural age profile; conflicts in the countryside; and rising rural housing markets and the limited access of lower income groups to housing in rural areas. Out-migration is seen as a major transforming factor in rural areas, especially emotive indicators such as the out-migration of young people either unable to afford housing or unable to find work. Rural Wales, generally, has a unique language and culture and is perceived to be particularly vulnerable to the detrimental effects associated with both in an out migration.

This section examines the nature of the rural population in Wales. It does this by focusing on the following subjects and issues:

- Demography
- Types of rural settlement
- Migration and reasons for migration
- Ethnicity and National Identity
- Use of the Welsh Language

### Demography and Household Structure

2.1 The survey indicated that 38% of households in rural Wales were two-person households. A quarter of the households were single person; almost 30% had either three or four people; and 8% had five or more people.

2.2 With respect to household income, single person households were more likely to have a low income, and 55% of households with an income of less than £10,000 were single person. Two person households were most likely to have the highest income, with 37% of households with an income of greater than £52,000 having two persons.

2.3 In terms of tenure, 47% of the households surveyed owned their homes outright; 35% had a mortgage; 7% were privately rented; and 8% socially rented. Table 2.1 shows the relationships between the different types of tenure and the three age groups used in the survey. To a great extent, an expected pattern emerged with greater proportions of older people owning their homes outright.

**Table 2.1: Relationship between house tenure and age**

House Tenure	16 – 34	35 – 54	55+
Owned outright	18%	27%	72%
Mortgage/ Loan	50%	55%	15%
Rent – L.A.	7%	4%	5%
Rent – Housing Ass.	4%	3%	2%
Rent – Private	15%	8%	4%

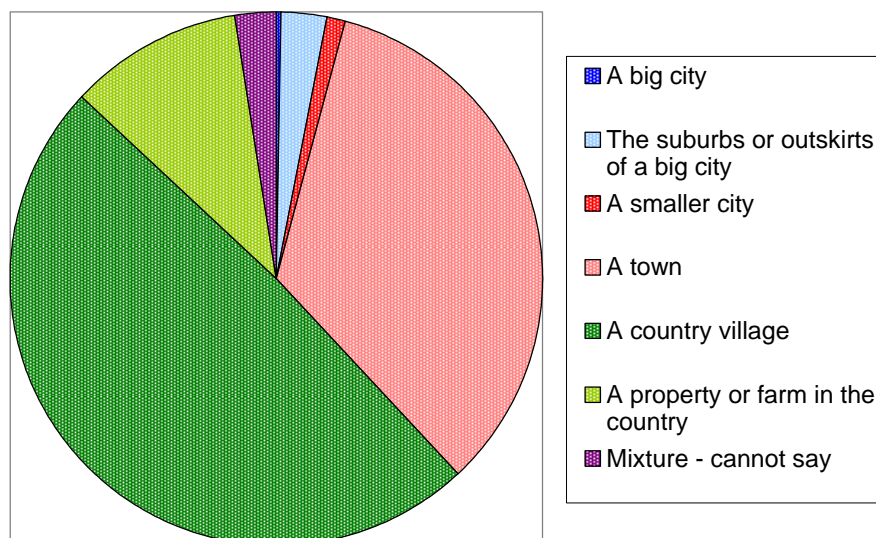
Surprisingly, with regard to income, 40% of respondents with a household income of more than £52,000 pa owned their homes outright, compared to 50% of those on annual incomes of less than £5,000. The latter group could have included older, retired people more likely to have bought their homes outright.

### Area and type of settlement

2.4 In terms of place of residence the chart below at Figure 2.1 shows that 49% of respondents defined the type of

settlement where they lived as a country village. The next highest response at 34% was by respondents who defined where they lived as a town, followed by 10% who lived in a property or farm in the country. Those who defined where they lived in terms of a city returned the smallest responses - 3% in the suburbs of a big city; 1% in a smaller city; while a small number defined where they lived as a big city. The remaining 3% was not able to define the type of settlement where they lived. These results are outlined at section 1.8 of this report.

**Figure 2.1: Showing the types of area (self-definition) where respondents lived**



2.5 Respondents were asked in what type of settlement they had spent most of their lives. Results showed that 37% had spent most of their lives in a country village; 34% in a town; and 10% of respondents had spent most of their lives in a big city.

2.6 Exploring the relationships between place of residence and income, the survey showed that there was a tendency for higher income households to live in the country, and 69% of households with an annual income of over £52,000 lived either in a country village, or in a property or farm in the country.

### Levels of Satisfaction with Places of Residence

2.7 Respondents were asked to rate their levels of satisfaction with the area where they resided. In general, respondents were more satisfied than dissatisfied with living in rural Wales, with 92% expressing satisfaction, including 68% who were very satisfied, against 5% who expressed a degree of dissatisfaction.

Although expressions of satisfaction were generally high, there was a tendency for them to increase with age. For example, 87% of the 16 – 34 age group was

satisfied; 92% of the 35 – 54 group; and 94% of the 55+ group. Similarly, the proportions of those respondents who expressed satisfaction increased with income; rising from 89% of those with a household income of less than £5000 pa to 94% of those with incomes of more than £52,000 pa. In terms of social class, no identifiable pattern was apparent, with all social classes recording satisfaction levels of over 90%, although social classes AB had greater proportions of people who were 'very satisfied' at 71% compared to the other social classes, which ranged between 66% to 68% for 'very satisfied'.

2.8 When asked what it was that they liked about the area where they lived, respondents pointed to a range of attributes. For example, 53% liked the environment, specifically the peace and quiet; 21% found the local environment to be pleasant; 21% lived in what they termed a good location; and 27% liked the scenery.

These expressions of contentment with the area were consolidated by the 50% of respondents who stated that they disliked 'nothing in particular' about their area. This response was more common among older people, 55% of those in the 55 + age group compared to 39% of the 16 – 35 age group. Broadly, around these issues of satisfaction with where respondents lived, the 2007 survey was in accordance with the survey of 2004.

2.9 The principal sources of dissatisfaction were services such as public transport, shops and amenities. Services are awarded a separate section (Section 5) in this report.

## Length of Residence

2.10 As in the 2004 report the 2007 survey found evidence of considerable population stability in rural Wales: 20% of respondents had always lived in the same property. Other results that provided evidence of population stability were that 28% of respondents had lived in their present property for more than 20 years; 51% for between 5 and 20 years; and 21% for less than 5 years.

2.11 The most stable demographic group was those over 55 years, while those in the 25-34 and 35-54 age groups were more likely to have moved recently. In terms of household income 21% of respondents with a household income of less than £5,000 had always lived in the same place, compared to 13% of those with an income of more than £52,000 pa. Welsh speakers were less likely to move away.

## Migration

2.12 As discussed at the start of this section, the viability of local communities and their long-term sustainability are major concerns in rural Wales. Contributing to these concerns are issues such as the decline in the importance of agriculture; the strength of Welsh language and culture; and demographic changes, particularly population migration.

2.13 Those respondents who had not always lived in the same property were asked where they had moved from. These results are presented in tabular form below.



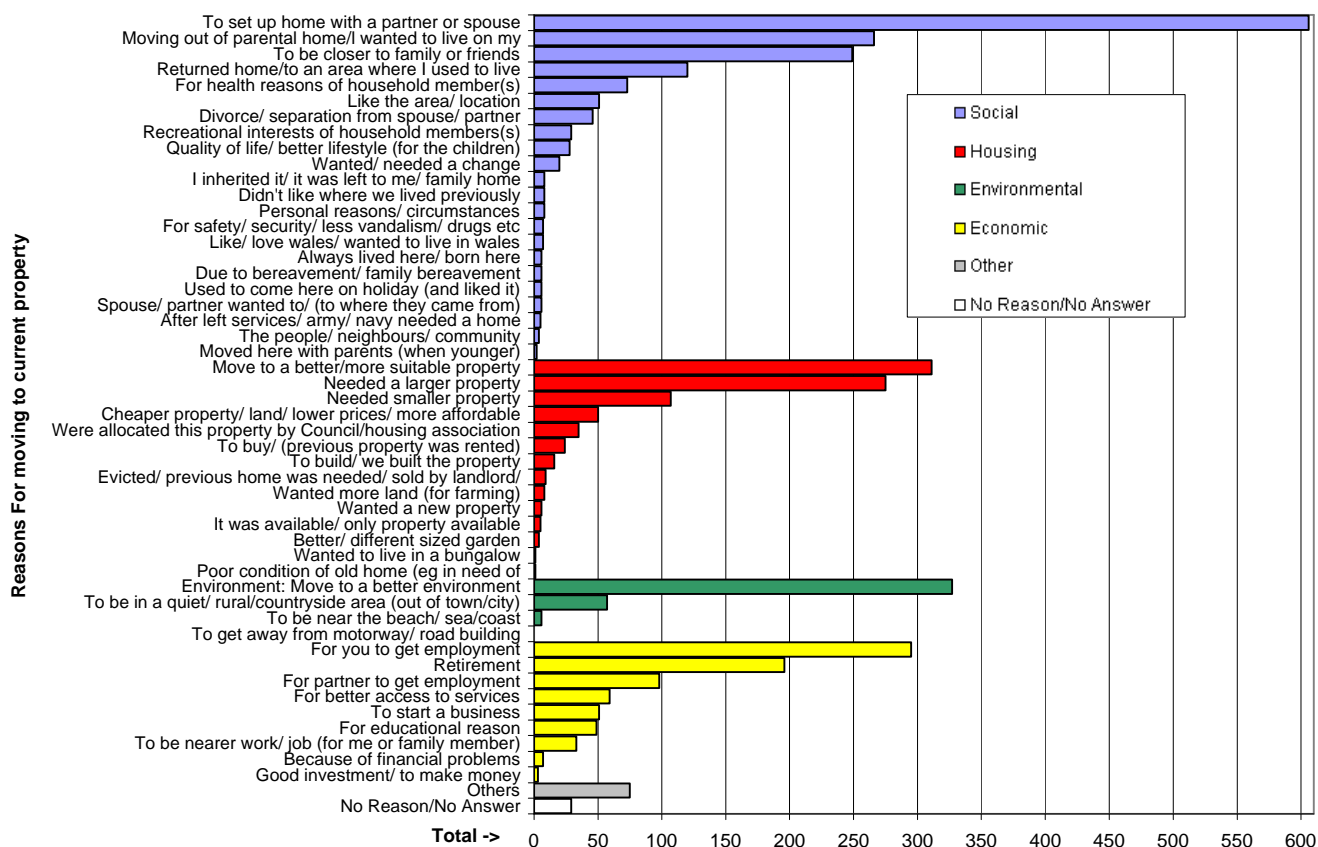
Table 2.2: 2004 and 2007 comparison of movement within Wales

2004	Elsewhere in the same area	Elsewhere in rural Wales	Urban Wales	Outside Wales	Totals
	37%	12%	11%	38%	100%
2007	Move locally	Elsewhere in rural Wales	Elsewhere in Wales	Outside Wales	
	41%	6%	17%	36%	100%

2.14 Those respondents who had not always lived in their current home provided a range of answers when asked the open-ended question 'why did you move to your current location'. These answers were collated into four groups. First, there were social factors such as changing family circumstances, leisure interests, or returning to the area that they used to live.

Second, there were housing issues connected with the search for an appropriate property. Third, there were environmental factors. Fourth, there were economic reasons, such as retirement or to take up employment. Figure 2.2 below shows these four groups, together with some of the specific reasons given.

Figure 2.2: Graph showing the reasons people have moved to their current residence

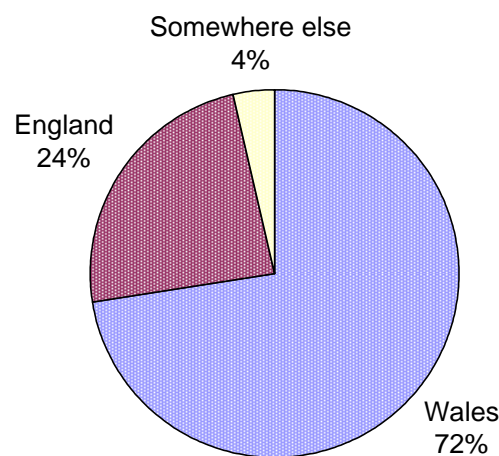


2.15 Figure 2.2 shows that social reasons predominated, with the principal reasons being moving to set up home with a partner or spouse; leaving the parental home to live on one's own; and wanting to be closer to family and friends. Other prominent reasons for moving were to live in a more appropriate property; to seek a better environment; and retirement.

2.16 For 27% of respondents who had moved, the move to their current location constituted a return to where they had used to live. The chart at Figure 2.3 shows that 72% of people surveyed had spent most of their lives in Wales.

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**Figure 2.3: Chart showing where people have spent most of their lives**



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### Ethnicity and National Identity

2.17 Ethnically, 99% of respondents considered themselves white. In terms of national identity, 52% viewed themselves as being Welsh; 13% felt they were English; and 31% understood themselves as being British. There was some variation according to age among those who considered themselves Welsh, and 58% of the 16 – 34 age group; 56% of the 35 – 54 age group; and 48% of the 55 + age group saw themselves as being Welsh. The comparatively low result for the 55 + group could be attributed to non-Welsh immigrant retirees. Similar results were found by the 2004 survey.

### Welsh Language

2.18 With regard to Welsh language ability, 18% of the respondents could speak Welsh fluently; 9% quite well; 19% could speak a few sentences; 28% could speak only a few words; and 25% could not speak any Welsh at all. In terms of age, the youngest age group of 16 – 34 had the largest proportion of fluent Welsh speakers at 22%. This compared to 16% of the 25 – 54 age group and 18% of the 55 + group.

2.19 There were noticeable geographical differences in Welsh language proficiency. For example, only 1% of those surveyed in Monmouthshire were fluent, compared to

47% in Gwynedd. There were not such marked differences between geographical areas for the responses (quite well, speak a few sentences, only a few words and not at all) that indicated lesser degrees of proficiency in Welsh. Table 2.3 below shows the percentages for fluency in Welsh by local authority area.

The 2004 survey recorded similar differences in Welsh language proficiency. As in 2007, Gwynedd had the highest proportion of fluent Welsh speakers and Monmouthshire had the lowest.

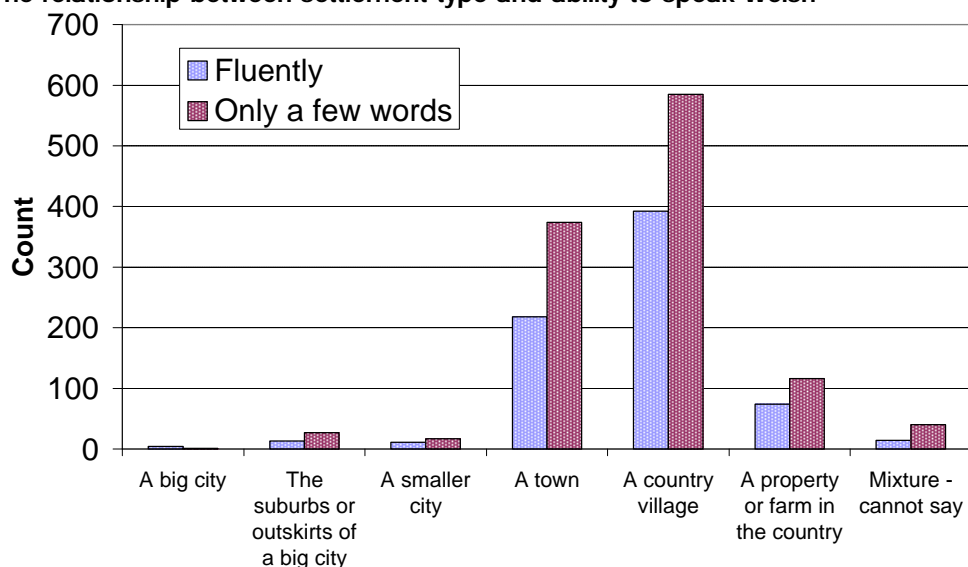
2.20 There were also variations in the numbers of fluent Welsh speakers according to the type of place where respondents lived. Only small proportions of those respondents who defined where they lived as a city were fluent Welsh speakers. However, these numbers rose to 32% for those living in a town and 52% for those in a country village. Surprisingly, a relatively low 10% of respondents who lived in a property or farm in the country were fluent in Welsh. Figure 2.4 presents these data graphically.

**Table 2.3: Proportions of fluent Welsh speakers per area**

Area	Fluent Speakers (%)
Isle of Anglesey	32%
Gwynedd	47%
Conwy	16%
Denbighshire	13%
Powys	9%
Ceredigion	27%
Pembrokeshire	7%
Carmarthenshire	29%
Monmouthshire	1%
Flintshire	6%
Wrexham	10%
Vale of Glamorgan	4%
Swansea	3%
Neath Port Talbot	13%
Bridgend	5%
Rhondda Cynon Taff	10%



Figure 2.4: The relationship between settlement type and ability to speak Welsh



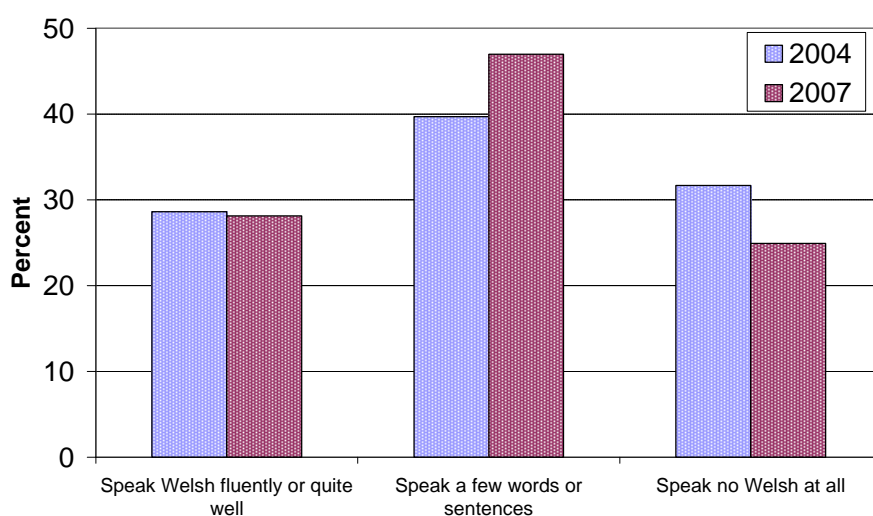
The most popular place for respondents to speak Welsh was at home. Other popular situations to speak Welsh were with neighbours and friends, and to lesser degrees at work and at community centres, shops and public houses.

2.21 Figure 2.5 below presents graphically a comparison of Welsh language ability between the 2007 and 2004 surveys. Among the salient points are that in 2007, 18% of respondents were fluent, which is

slightly down on the 2004 result of 20%. However, in 2007, 47% of respondents could speak a few sentences or a few words, which is a considerable increase on the 2004 result of 33%.

It would appear, then, that while fluency in Welsh language was relatively steady more people were attaining some degree of proficiency in the language.

Figure 2.5: Graph showing 2004 and 2007 Welsh language ability



## Key Findings

- Over half of the households in the survey of rural Wales consisted of two or fewer members.
- Most of the respondents owned their homes outright.
- Most people were very satisfied with the area they lived in – satisfaction increased with age and income.
- Compared to 2004, more people moved within their local area, but considerably less moved to somewhere else in rural Wales.
- The main reason people had moved to their current location was to set up home with their partner or spouse.
- Just over half of the respondents considered themselves Welsh.
- Younger respondents were more likely to consider themselves Welsh, and were also more likely to speak Welsh.
- While slightly fewer respondents spoke Welsh fluently than in 2004, considerably more spoke a few words or sentences.
- The numbers that can speak no Welsh have decreased from one in three in 2004 to one in four in 2007.

## SECTION 3

## COMMUNITY

### Introduction

3.1 The term community has acquired a range of meanings, which tend to depend on the type of study being undertaken. In this report, community is taken to mean something that is predominantly spatially determined; a space consisting in people who interact daily with their neighbours through, for example, work, commerce, the church, the chapel, town or community councils, and local political parties.

3.2 Historically, rural communities have been seen to embody a 'traditional' strong community spirit with high degrees of participation. However, rural communities are perceived to be vulnerable to factors such as agricultural restructuring and population change, particularly the out-migration of the young and the in-migration of retirees and second-home owners. In rural Wales, Welsh language and culture are seen as, especially vulnerable, additional and important factors.

This section, then, focuses on issues concerned with involvement in collective activities and local organisations, wider civic participation, local social interaction, and respondent's experiences and perceptions of community life.

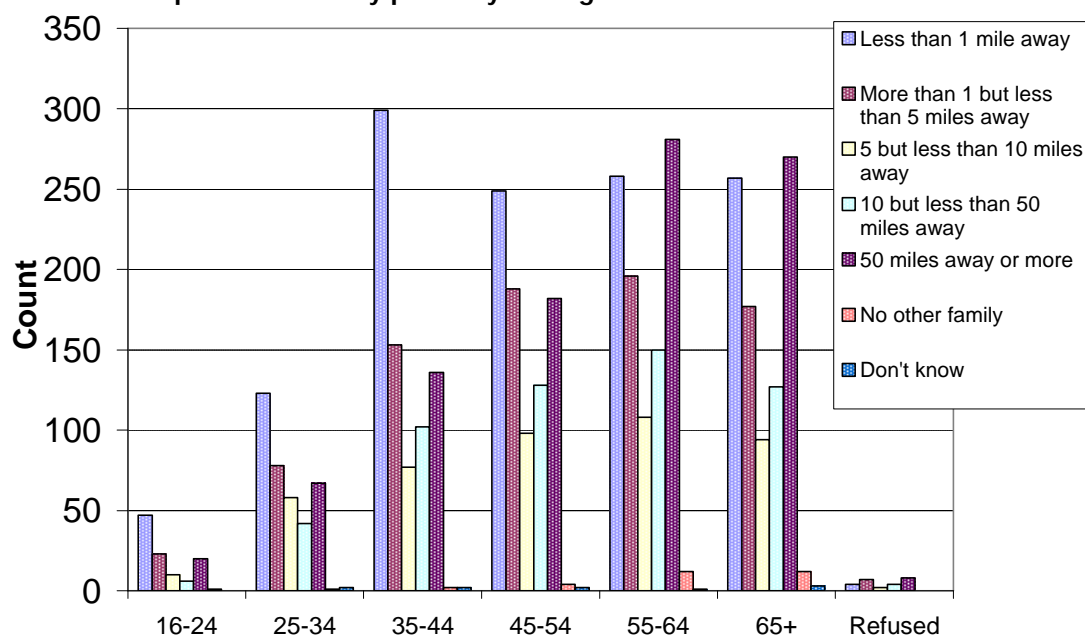
The section is structured around the following themes:

- Local Social Interaction
- Local Organisations
- Social Activity
- Community Feeling and Participation

### Local Social Interaction

3.3 The survey found that 30% of all respondents lived less than 1 mile away from the nearest member of their family. Younger respondents tended to live closer to other members of their family. Figure 3.1 presents graphically the proximity of family members to respondents by age group.

Figure 3.1: Relationship between family proximity and age

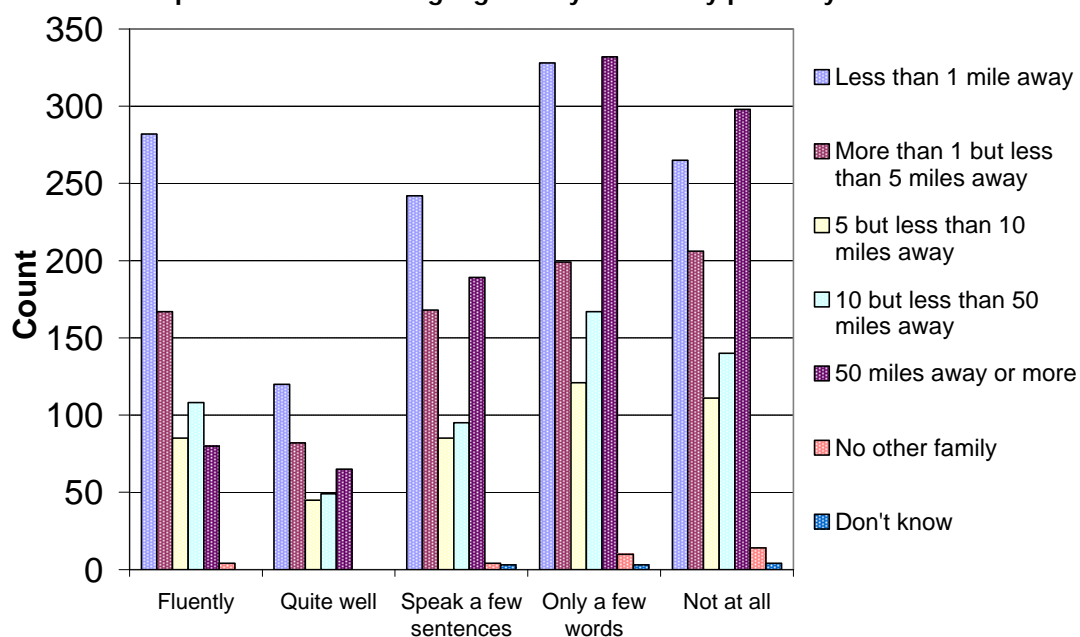


The 2007 results were similar to those from the 2004 survey, which showed that 30% of households had family members living within 1 mile, and 60% of respondents had family members living within 10 miles.

3.4 Respondents who had spent most of their lives in Wales were considerably more likely to live close to another family member. For example, 37% of those who had lived in Wales for most of their lives lived less than one mile from their nearest family member, compared to 14% of those who had lived outside Wales. Those respondents who had spent most of their lives in Wales were more likely to live within 1 mile of a family member; 37% did so, compared to 14% of those who had lived most of their lives outside Wales. Conversely, only 15% of those who had spent most of their lives in Wales had their closest family member over 50 miles away, compared to 48% of those who had spent most of their lives outside Wales. Overall, 30% of households in the 2007 rural Wales survey lived less than one mile away from the closest members of their family, which was the same result as the 2004 survey.

3.5 Welsh identity and language were also factors in familial attachments. For example, 38% of those respondents who considered themselves Welsh lived less than one mile away from a family member, which was a considerably greater proportion than other nationalities. The relationships between Welsh language ability and close family networks are shown by the graph at Figure 3.2 below. Among the salient points were that 37% of fluent Welsh speakers lived within a mile of their nearest relative, compared to 29% of those who spoke a few words or sentences and 26% of those who spoke no Welsh at all. Moreover, those respondents who spoke fluent Welsh were less likely to live a considerable distance away from close family. For example, 13% of those who spoke fluent Welsh lived 50 miles or more away from their relatives, compared to 29% of those who spoke no Welsh at all. Indeed, the ability to speak Welsh decreased notably among respondents who were more than 50 miles away from family.

Figure 3.2: Relationship between Welsh language ability and family proximity



3.6 In terms of community networks extending beyond family, 58% of all respondents spoke to their neighbours on most days and 30% spoke to them once or twice a week. Those in the 55+ age group spoke more with their neighbours than the other age groups. Results showed that 64% of the 55+ age group spoke with their neighbours on most days, compared to 55% of the 16 – 34 age group and 52% of the 35 – 54 age group.

3.7 There was differentiation in neighbourly contact between both income groups and social classes. Lower income groups tended to interact with neighbours more frequently with 64% of those on less than £10,000 pa speaking to neighbours on most days, compared to 50% of those on salaries over £52,000 pa. With regard to social class, 65% of those in social classes DE spoke to their neighbours on most days, compared to 54% of those in social classes AB.

3.8 In terms of the type of area where people lived there was a small difference between more urban areas and country villages with 58% of those living in a town or a city speaking to their neighbours on most days, compared to 62% of respondents who lived in a village. Of those living in a property or farm in the country, only 38% spoke with their neighbours on most days. However, this relatively low result might have been a function of spatial remoteness.

### Local Organisations

3.9 Participation in local organisations and collective activities appeared to be low,

with 99% of respondents not participating in locally based organisations such as Residents Associations and Neighbourhood Watch Schemes. Similarly low levels of community participation in local organisations were found by the 2004 survey.

### Social Activity

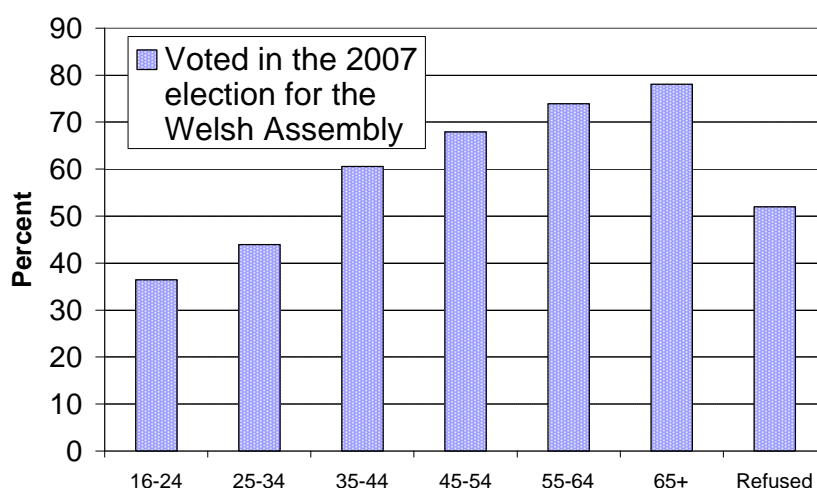
3.10 In addition to questions concerning formal membership of local organisations, there were questions about a range of social activities, which, it could be argued, also constitute civic society and community. These social activities were voting, providing care for neighbours and friends, and doing voluntary work for a local charity or other organisation.

#### *Activity 1: Voting in the 2007 election for the Welsh Assembly*

3.11 In overall terms, 67% of respondents voted in the 2007 election for the Welsh Assembly. This represented an increase on the 2004 survey when 59% of respondents voted in the 2003 Welsh Assembly election.

3.12 The proportions of those who voted increased with the age of the respondents, with 42% of the 16 – 34 age group voting; 64% of the 35 – 54 age group; and 76% of the 55+ year age group. It should be noted, of course, that the 16 – 34 age group might have included people under 18, who were ineligible to vote. Figure 3.3 below illustrates graphically, and in more detail, the relationships between age and voting in the 2007 Welsh Assembly election.

**Figure 3.3: The relationship between age and voting in the 2007 election**



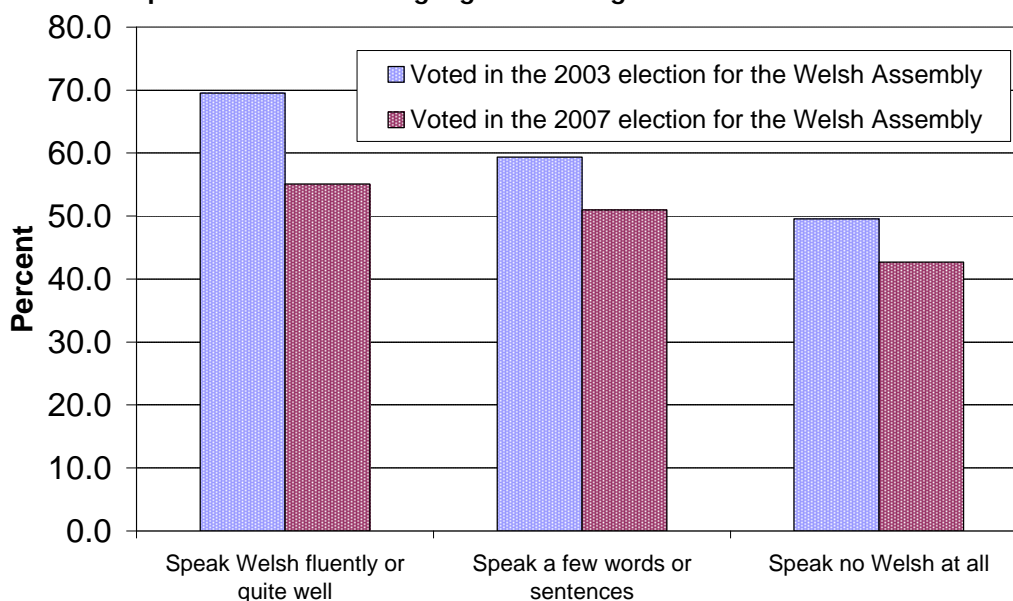
3.13 There did not appear to be a strong relationship between voting and income. However, there was a trend according to social class. Of those respondents in social classes AB, 72% voted, compared to 68% of social class C1, 62% of C2, and 67% of DE.

and 20 years; and 75% of those who had lived in their residence for over 20 years. Of course, those who had lived in their present property for longer periods would have tended to be in the older age groups, which accorded with the age -related results discussed above at 3.12.

3.14 In terms of length of residence, people who had lived in their present property for longer periods were more likely to vote. Indeed, there was clear pattern with 56% of people who had lived in their residence for less than 5 years voting; 68% of those who had lived there for between 5

3.15 A clear positive relationship emerged between voting and Welsh language ability. Figure 3.4 below illustrates graphically this relationship for the 2007 survey, which considered the 2007 Assembly election, and the 2004 survey, which considered the 2003 Assembly election.

**Figure 3.4: Relationships between Welsh language and voting for 2007 and 2003**





3.16 The positive relationship between speaking Welsh and voting was reinforced by the apparent relationship between national identity and voting. Of those respondents who regarded themselves as Welsh, 71% had voted. This was higher than those who regarded themselves as British of whom 66% had voted, and English, who recorded 58%. Of those who felt they were something other than these three, 60% had voted.

3.17 There was a clear difference in voting behaviour between respondents who owned their home, 70% had voted, and those respondents who did not own their home, of whom 55% had voted. The final result for voting behaviour discussed here shows a difference between respondents who were not in work, 71% had voted, and those in work, 65% had voted.

### ***Activity 2: The provision of care for neighbours or friends***

3.18 One view of community, as defined in this report, is that it is based on a network of bonds that provide support and stability for those involved. The provision of care for friends and neighbours was one dimension of these support networks explored by the survey.

3.19 Overall, 43% of respondents said that they had provided care for neighbours or friends in the last twelve months. Reflecting, what is perceived to be a traditional gender division associated with 'caring' work, 39% of men had provided care compared to 46% of women.

3.20 In terms of age, older respondents were more likely to have provided support. For the 16-34 age group the result was 36%, while both the 35 - 54 age group and the 55+ group turned-out at 43%.

3.21 While there were no apparent relationships between the provision of care and income, a trend was apparent with respect to social class. The proportions of respondents in social classes AB, C1 and C2 who had provided care were 46%, 45% and 42% respectively. At 37%, fewer respondents in social classes DE had provided care.

3.22 In terms of length of residence, longer-term respondents were more likely to have provided care. Results showed that 37% of those who had been at their residence less than five years had provided care to neighbours or friends, compared to 44% of those who had been there between five and 20 years, and 45% of those who had been there longer than 20 years.

3.23 The survey showed that those respondents more proficient in the Welsh language were more likely to have provided care, reinforcing the emergence of possible connections in this section between community and population stability, length of residence, and Welsh language and culture,. For example, 45% of respondents who were fluent or able to speak some Welsh had provided care and support, compared to 36% of respondents who did not speak Welsh. The perceived connections between community and population stability, length of residence, and Welsh language and culture found in the 2007 survey were similar to those found in the 2004 survey.

3.24 To a certain extent the positive relationship between the provision of care and home ownership reinforced the connections with community stability discussed at 3.23. Respondents who owned their property were more likely to provide care, with 43% of property owners, and 39% of non-property owners providing care and support in the last twelve months.

### **Activity 3: Voluntary work for a local charity or other organisation**

3.25 Overall, 32% of all respondents had done some form of voluntary work for a charity or other organisation in the last twelve months. There was no gender differentiation.

3.26 In terms of age, the older respondents were more likely to do voluntary work. The survey indicated that 23% of the 16 – 34 age group; 31% of the 35 – 54 group; and 35% of the 55+ age group had done voluntary work.

These results were unsurprising and there are a range of factors that might explain them. For example, younger people tend to be, understandably, focused on making their way in the world. As they progress they may be in a better position to do voluntary work, and, of course, those in retirement are more likely to have the time to commit to voluntary work.

3.27 There were apparent relationships between social class and doing voluntary work. Of the respondents in social classes AB, 42% had done voluntary work. This compared to 33% of social class C1, 25% of C2, and 28% of social classes DE. A positive relationship with income was also perceived with 27% of those with an income of less than £9,999 and 40% of those with an income of more than £52,000 having done some voluntary work.

3.28 In terms of length of residence, well established respondents were more likely to have provided care. The survey indicated that 26% of those who had been at their residence less than five years had done voluntary work, compared to 33% of those who had been there between five and 20 years, and 34% of those who had been there longer than 20 years.

3.29 As with the two other social activities discussed in this section, there was a positive relationship between Welsh language ability and doing voluntary work. Of those respondents who spoke fluent Welsh 35% had done voluntary work, as had 34% of those who spoke some Welsh. This compared to 25% of those who spoke no Welsh at all. However, there did not appear to be a clear relationship between doing voluntary work and national identity. Indeed, the highest proportion of respondents who had done voluntary work was from the 'none of these' category at 35%, although this was from a very small count.

3.30 Taking together the three social activities of voting, the provision of care and voluntary work, the survey results suggested that those people who were more established members of a spatial community were also more active members of the associated social and cultural communities. Further, it appeared that there were positive relationships between community and population stability, length of residence, and Welsh language and identity.

### **Community Feelings and Perspectives**

3.31 To further explore the idea of community, respondents were asked to respond to a number of statements and asked whether or not they agreed with them. For each statement the possible responses were:

- Agree strongly
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Disagree strongly



The statements were:

1. I consider myself to be a member of the local community
2. People in my community look out for each other
3. I feel safe living in my community
4. I definitely enjoy living in my community
5. There is a strong sense of community feeling in the place that I live
6. The ability to speak Welsh is important for participating fully in my community
7. It can feel isolated living where I do
8. I can influence decisions that affect this area

The responses to each statement are analysed below.

***Statement 1: I consider myself a member of the local community***

3.32 Overall, 82% of all respondents agreed with the statement I consider myself to be a member of the local community, with 7% disagreeing. Respondents who were well established in terms of residence were more likely to feel part of the local community. In addition, feelings of belonging rose sharply with age, and 69% of the 16 – 34 group agreed that they were a member of the local community, compared to 81% of the 35 – 54 group and 86% of the 55+ group. There were also positive relationships between attachment to community and Welsh language and culture, although even among those who spoke no Welsh or did not consider themselves to be Welsh the expressions of community attachment were relatively high. For example, 75% of those respondents who saw themselves as English considered that they were members of the local community.

***Statement 2: People in my community look out for each other***

3.33 At 83%, there was again a high proportion of agreement with the statement People in my community look out for each other. Relationships appeared to follow similar patterns to Statement 1, although there was a difference between those with some proficiency in the Welsh language at 85% and those who spoke no Welsh at all, at 79%.

***Statement 3: I feel safe living in my community***

3.34 Agreement with the statement I feel safe living in my community was high, with 65% of respondents 'agreeing strongly' and 30% 'tending to agree'. Rates of disagreement were correspondingly low. The type of settlement appeared not to have a bearing on perceptions of safety.

***Statement 4: I definitely enjoy living in my community***

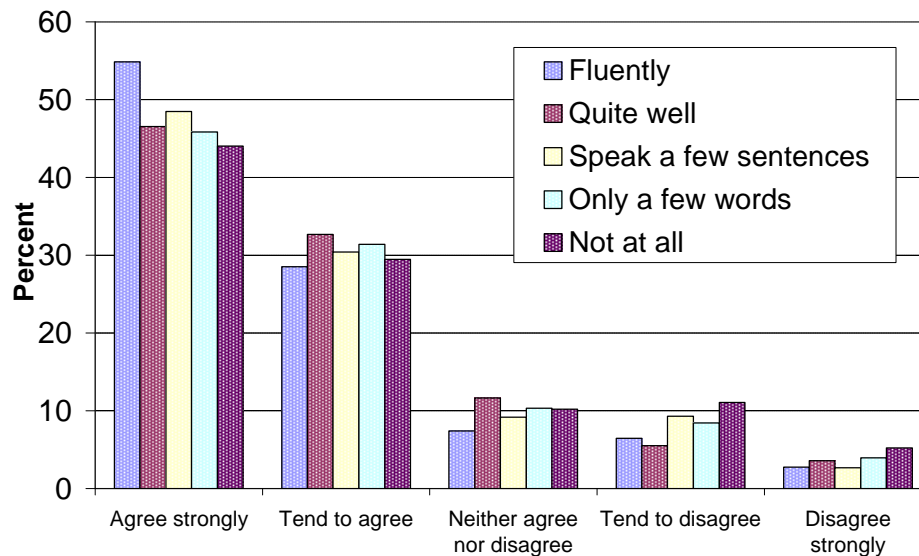
3.35 At 94% of respondents, most people definitely enjoyed living in their community. With such a high proportion of expressed agreement few factors stood out. However, people living in towns and cities were less likely to agree that they definitely enjoyed living in their community.

***Statement 5 There is a strong sense of community feeling in the place I live***

3.36 In response to the statement that there was a strong sense of community feeling in the place that they lived, 78% of respondents agreed to some extent (48% 'agreed strongly' and 30% 'tended to agree'), and 13% disagreed to any extent. Those who lived in a country village were more likely to agree with the statement, followed by those who lived in a property or farm in the country. Those who lived in a town or city were least likely to identify a strong sense of community.

3.37 There were also differences focused on Welsh language and culture. Figure 3.5 below illustrates graphically the relationships between Welsh language proficiency and a strong sense of community, with a high proportion of fluent Welsh speakers 'strongly agreeing'.

**Figure 3.5: Relationship between strong community and Welsh language ability**



In terms of national identity, 80% of respondents who considered themselves Welsh agreed that there was a strong sense of community, compared to 78% of those considered themselves British. This dropped to 72% for respondents who considered themselves English.

**Statement 6: The ability to speak Welsh is important for participating fully in my community**

3.38 While responses to the previous statements tended to be positive in terms of community, responses to the statement the ability to speak Welsh is important for participating fully in my community were more ambiguous. Overall, more people believed that the ability to speak Welsh was not important for community participation. The results were, 35% agreed and 56% disagreed with the statement. However, those respondents

who spoke Welsh turned this result around, and 70% of Welsh speakers agreed that the ability to speak Welsh was important for community participation (47% of respondents who could speak Welsh fluently agreed strongly) and 23% disagreed. In addition, respondents from areas of rural Wales where Welsh language and culture were traditionally strong were more likely to agree on the importance for community of the Welsh language, with 75% in Gwynedd agreeing. Anglesey, Ceredigion and Carmarthenshire also had high proportions of agreement.

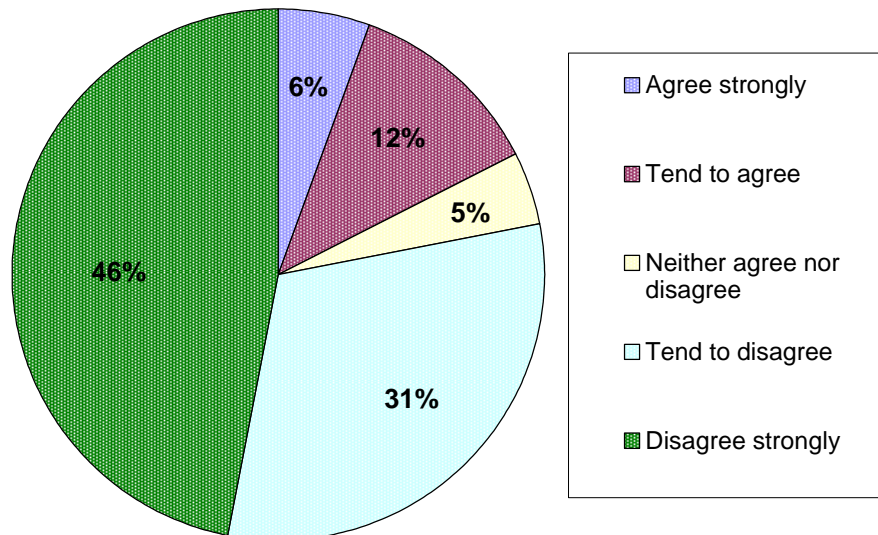
3.39 These results suggested that there were, in effect, two communities – a Welsh speaking community and an English or non-Welsh speaking community. This inference tended to be supported by the results in terms of national identity, where 26% of people who considered themselves

Welsh agreed strongly with the statement, compared to 11% of those who considered themselves British, 10% of those who considered themselves English and 14% of those who considered themselves something else.

**Statement 7: It can feel isolated living where I do**

3.40 The chart at Figure 3.6 below shows responses to the statement it can feel isolated living where I do. Overall, most people did not have feelings of isolation.

**Figure 3.6: Graph showing percentages of people feeling isolated**



3.41 In terms of the type of settlement where people lived, respondents living in a property or farm in the country were more likely to agree that they could feel isolated. This result might have been attributable to spatial isolation.

3.42 Those respondents who identified themselves as Welsh (16%) were less likely to feel isolated than English (20%) or British (19%) respondents. However, respondents from 'other' nationalities, at 14%, were even less likely than Welsh respondents to feel isolated. A possible explanation for this apparent anomaly might have been the existence of discrete communities of incomers, with strong internal networks, within the wider community.

**Statement 8: I can influence decisions that affect this area**

3.43 Responses to the statement I can influence decisions that affect this area tended to be negative, and 46% disagreed, 39% agreed, and 15% were undecided. The results revealed correlations between feelings that one could influence decision making and increases in age, length of residence, and income. A relatively high proportion of respondents in social class AB felt that they could influence decision making compared to respondents in social classes C1, C2 and DE.

## Key Findings

- 30% of all households lived less than one mile away from the nearest member of their family. Those speaking Welsh and considering themselves Welsh were more likely to live close to family.
- 67% of respondents had voted in the 2007 election for the Welsh Assembly. This compared to 59% who had voted in the 2003 election. Considerably fewer younger people had voted. Welsh speakers were more likely to have voted.
- 82% of respondents considered themselves members of the local community. Community attachments tended to increase with both length of residence and age.
- Welsh speakers were more positive about their local community, and felt more attached to it.
- 65% of respondents felt safe living in their community. Those living in rural areas were more likely to feel safe.
- English respondents were more likely to feel isolated compared to Welsh or British respondents.

## SECTION 4

## WELL BEING AND WELFARE

### Introduction

4.1 Arguably, the idea of the rural idyll, with its associations of relative affluence and strong community ties, has tended to hide issues of poverty and social exclusion in rural areas. However, recent research has started to explore these issues in rural space. This section explores these issues in rural Wales by examining the perceptions of the respondents in terms of welfare in their communities.

The section is divided into the following thematic areas:

- A summary of respondents' welfare and benefit information
- Respondents' feelings concerning their general well-being and welfare
- Broader issues of welfare and quality of life

### Summary of income, welfare and benefit information

4.2 Table 4.1 below shows the annual household income of the 2680 respondents who were prepared to provide this information. The salient point is that 18% of households were living on an annual income of less than £10k.

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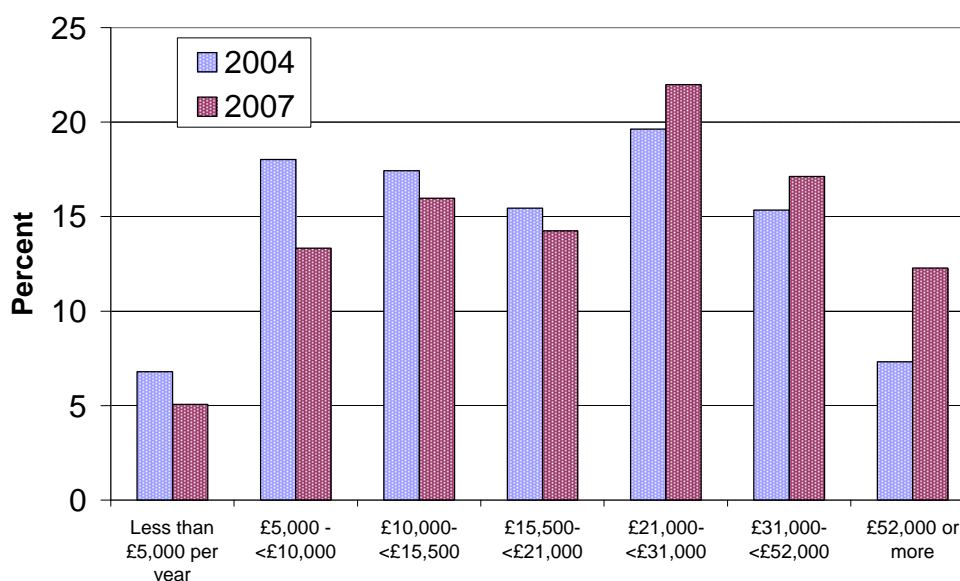
**Table 4.1: Annual Household Income of respondents**

	Number of households	% of respondents
Less than £100 per week/less than £5,000 per year	136	5%
£100-199 / £5,000-£9999	357	13%
£200-299 / £10,000- £15,500	428	16%
£300-399 / £15,500- £21,000	382	15%
£400-£599 / £21,000- £31,000	589	22%
£600-£999 / £31,000- £52,000	459	17%
£1,000 a week or more / £52,000 or more	329	12%
Total	2680	100%

4.4 Figure 4.1 shows changes in income levels between the 2004 and 2007 surveys. It shows that, compared to 2004, in 2007 there were fewer households on low incomes. In addition, in 2007 there were more households with higher incomes. However, two factors that made

comparisons difficult should be noted. Firstly, in 2007 more respondents refused to provide details of income. Secondly, the definition of rural used in 2007 tended to include areas defined previously as urban.

**Figure 4.1: Changes in income between 2004 and 2007**



4.5 Respondents were asked about their perceptions of changes in income levels over the last five years in their local area. Table 4.2 below presents these responses.

**Table 4.2: Perceptions of income levels over the last 5 years**

Response	Total: 4071
Improved a great deal	2%
Improved a little	17%
Not changed	49%
Got a little worse	10%
Got a lot worse	5%
Don't know	17%

The youngest age group (16-24) and the higher income bands were more likely to perceive an improvement in income levels in the area where they lived.

4.6 Table 4.3 below presents respondents' feelings concerning the adequacy of their household income. It shows that most people were either living comfortably (42%) or coping (42%) on their present income.

**Table 4.3: Perceptions of the adequacy of household income**

Total: 4071	
Living comfortably on present income	42%
Coping on present income	43%
Finding it difficult on present income	10%
Finding it very difficult on present income	3%
Refused	1%

4.7 In terms of income groups, there was an unsurprising tendency for those on higher incomes to be more likely to be comfortable, as Table 4.4 shows.

**Table 4.4: Perceptions of household income adequacy by income band**

	Income ( £ n K per annum )						
Total: 4071	< 5	5 - 9.9	10 -15.5	15.5- 21	21 - 31	31 - 52	52+
Living comfortably on present income	23%	23%	26%	33%	46%	58%	74%
Coping on present income	42%	47%	51%	52%	45%	39%	22%
Finding it difficult on present income	16%	19%	19%	13%	8%	2%	2%
Finding it very difficult on present income	18%	10%	3%	2%	1%	1%	1%
Don't know	1%	1%	-	-	-	-	-
Refused	-	-	-	-	-	-	-

However, in all income bands the majority of respondents were either 'living comfortably' or 'coping'. For example, in the lowest income band (less than £5K pa) 23% were 'living comfortably' and 42% were 'coping'.

4.8 In terms of sources of income, 36% of the respondents were working full-time; 14% were part-time; 9% were self-employed; and 30% were retired and received a pension. Benefits and tax credits were another source of income and Table 4.5 below presents a breakdown of benefits received by respondents, and shows that 46% of households surveyed received benefits or tax credits.

**Table 4.5: Respondents on benefits**

Benefits or Tax Credits	% of households
Income Support	5%
Jobseeker's Allowance	1%
Incapacity Benefit	7%
Disability Living Allowance or Attendance Allowance	10%
Working Tax Credit	9%
Council Tax Benefit	9%
Housing Benefit or Local Housing Allowance	4%
Training Allowance	-
Education Maintenance Allowance	1%
Winter Fuel Payments	19%
Carers Allowance	3%
Child benefit/ family allowance	4%
Child/ family tax credit	3%
Pension/ state/ widows pension	1%
Pensions credit	-
Others	1%
None of these	54%



4.12 With respect to outgoings or household expenses, 15% of households spent between £300 – £399 per month on rent or mortgage payments. Although the greatest number of households fell into this range, 35% of respondents paid more than this, including 13% who paid £600 – £699 per month.

4.13 Household savings tended to be low, with 21% of respondents returning savings of less than £1,000, while 5% reporting savings of more than £100,000. However, 20% of respondents claimed not to know the sum of their savings.

### Quality of Life

4.14 Perceptions of quality of life were generally positive, with an overall 92% of respondents rating their quality of life as either 'very good' or 'good'. However, there was relationship between positive perceptions of quality of life and increasing income: 85% of those in the lowest income bracket were positive regarding their quality of life; this increased with each income band, rising to 98% for those on the highest incomes. There was a similar gradient of positive perception for social class: 88% of social class DE were positive, rising to 96% of social class AB.

### Welfare and well-being

4.15 To further explore the issues of quality of life, welfare and community, respondents were asked the following series of questions:

1. How much of a problem would it be if you suddenly had to find £100 to meet an unexpected expense?
2. You are sick and unable to leave your bed. Is there anyone you could ask for help and if so who?
3. You need to borrow some money for a few days to help you out of financial difficulty. Is there anyone

you could ask for help and if so who?

4. Are there people in your local area who can be described as living in poverty?

An outline analysis of the responses to these questions follows.

#### *Q1. How much of a problem would it be if you suddenly had to find £100 to meet an unexpected expense?*

4.16 Most people surveyed would have found it fairly easy to find £100 if they needed it. Indeed, 73% of respondents gave this response; 22% would have found it difficult; for 3% it would have been impossible; and 2% either refused to answer or did not know. Unsurprisingly, those on higher incomes were more likely to have found it easy.

#### *Q2. You are sick and unable to leave your bed. Is there anyone you could ask for help and if so who?*

4.17 Only 4% of respondents stated that there was no one that they could ask for help. The 96% of respondents who had someone to turn to named spouses, other relatives, friends and neighbours. There was a tendency for older people to turn to neighbours, while people in the denser population centres were increasingly likely to turn to those outside of the immediate household.

#### *Q3. You need to borrow some money for a few days to help you out of financial difficulty. Is there anyone you could ask for help and if so who?*

4.18 Understandably, 11% of respondents said that they would prefer not to ask for help in this type of matter. One in ten respondents (10%) stated that they had no one to whom they could ask for a short term loan. For those respondents without a



prospective loaner, there was an inverse relationship with age. As people became older they were more likely not to have someone to turn to for a loan. The most popular category of loaner was a friend: 50% nominated a friend as someone they could turn to for a loan.

#### **Q4. Are there people in your local area who can be described as living in poverty?**

4.19 At 52% there were more respondents who felt that no one living in their area could be described as living in poverty than the 43% who thought there were people in poverty, while 5% did not know. Table 4.6 below shows the differences in perceptions held by respondents according to the local authority area where they lived.

**Table 4.6 Perceptions of poverty by area**

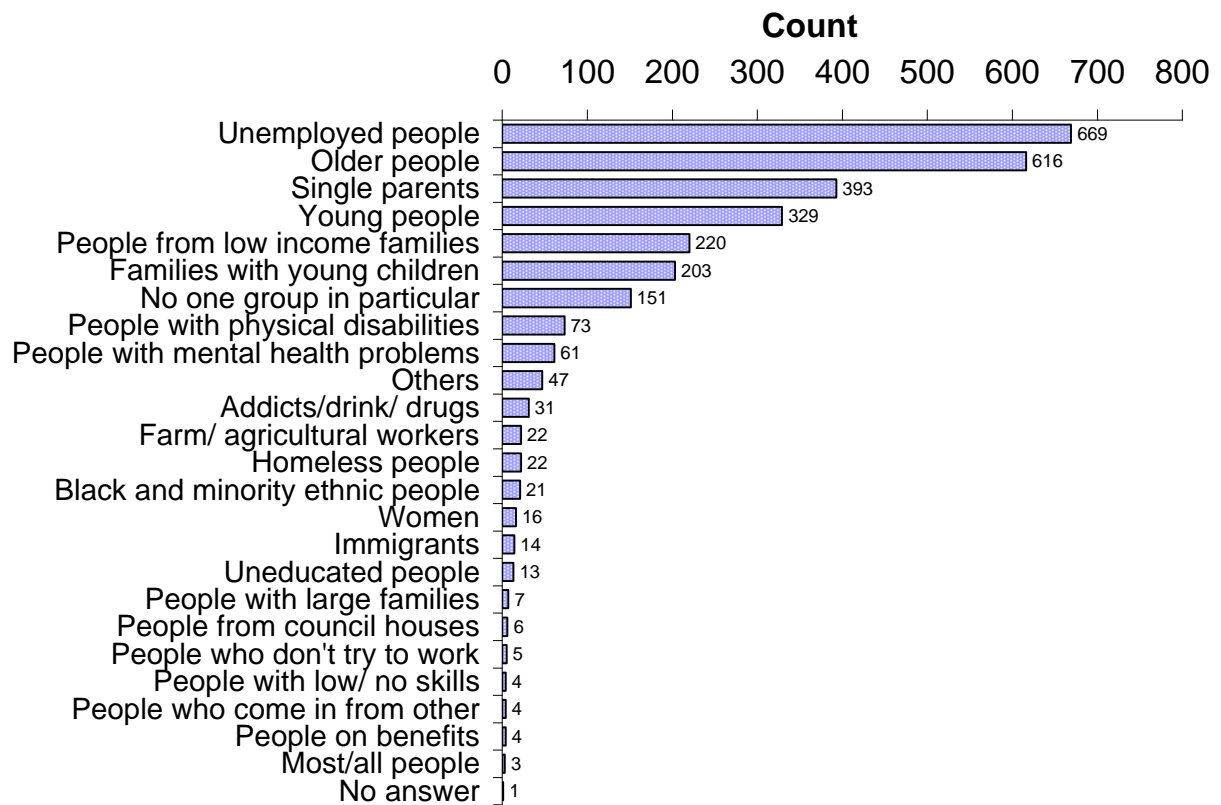
\* Small sample of 10

Area	YES	NO	DON'T KNOW
Isle of Anglesey	45%	50%	5%
Gwynedd	51%	44%	5%
Conwy	46%	48%	6%
Denbighshire	45%	50%	5%
Flintshire	36%	58%	6%
Wrexham	34%	60%	6%
Powys	39%	55%	5%
Ceredigion	43%	51%	6%
Pembrokeshire	43%	52%	5%
Carmarthenshire	45%	49%	6%
Swansea	18%	76%	6%
Neath Port Talbot	43%	48%	9%
Bridgend	52%	44%	4%
The Vale of Glamorgan	25%	71%	4%
Rhondda Cynon Taff *	40%	40%	20%
Monmouthshire	41%	54%	5%

4.20 More people living in a town or a city (49%) felt that there were people in their local area who could be described as living in poverty, compared to 40% of those who lived in a country village, 37% and those who lived in a property or farm in the country.

4.21 The groups that were identified as most likely to be living in poverty were unemployed people; older people; single parents; young people and families with young children. Figure 4.2 below illustrates graphically the numbers of respondents who identified each type of person perceived to be living in poverty.

Figure 4.2: Who respondents felt to be most likely to be living in poverty



### Key Findings

- 49% of respondents felt that incomes hadn't changed in their local area over the past five years.
- 18% of respondents refused to provide details of their income. This compares to 25% in 2004.
- 12% of those respondents who provided income details had incomes of less than £10,000 pa. This compares to 19% in 2004.
- 92% of respondents rated their quality of life as good or very good.
- 22% of respondents would find it difficult to get £100 to meet an unexpected expense, and 3% would find it impossible.
- People living in towns and cities were more likely to turn to their relatives for help and support, whereas people living in properties or farms in the country were more likely to turn to their spouses.
- Respondents living in more rural locations were less likely to perceive signs of poverty relating to other people living in their area.
- Respondents felt that unemployed people and older people were the groups most likely to be living in poverty in their local area.

## SECTION 5

## LOCAL SERVICES

### Introduction

5.1 While it would clearly be inefficient and uneconomical to provide services on an individual basis, there are arguments that recent strategies focused on the centralization of services have gone too far in the search for efficiency and left some areas thinly covered. Many local communities in rural Wales have lost services such as shops, public houses, schools, a permanent police presence, and their post office. Relative deficiency in service provision may be compounded in

rural areas by distance and perceived remoteness, both physical and administrative, from service centres. This section examines perceptions of services in rural areas; respondents were asked to rate the provision of a range of services in their local area. These services were National Health Services such as GP surgeries and hospitals; policing; public transport; schools; food shops; post office; banks and building societies; community centre; and leisure facilities. Table 5.1 summarises these responses.

**Table 5.1 – Rating Public Services in Local Areas**

Total 4071	NHS	Policing	Public Transport	Schools	Food shops	Post Office	Banks & building societies	Community centre	Leisure facilities
Good	67%	39%	36%	66%	65%	76%	64%	50%	53%
Fair	25%	38%	27%	14%	24%	16%	21%	20%	23%
Poor	7%	16%	26%	2%	9%	5%	9%	7%	12%
N/A	1%	7%	12%	17%	2%	3%	6%	23%	12%

The table shows that for each service there was a high proportion of respondents who rated the service as 'good' or 'fair'. The Post Office received the highest 'good' rating at 76%. Apart from public transport, policing received the lowest ratings, with middling ratings for 'good' (39%) and 'fair' (38%), and 16% of respondents rating Policing as 'poor'. Only three services (policing, public transport and leisure facilities) had double-figure percentages for responses that selected 'poor', though 9% of respondents rated the service provided by food shops, and by banks and building societies as 'poor'. Public

transport tends to stand out with a 26% 'poor' rating: i.e. one in four respondents considered public transport in their area to be poor. Moreover, only 36% rated public transport as 'good'. It appears that 23% of respondents did not have, or perhaps had never used, a community centre.

5.3 In terms of age there was a definite trend of approval increasing with age, culminating in 72% of the 55+ age group rating the NHS as 'good', and only 6% rating the service as 'poor'. Table 5.2 presents the age-related results in more detail.

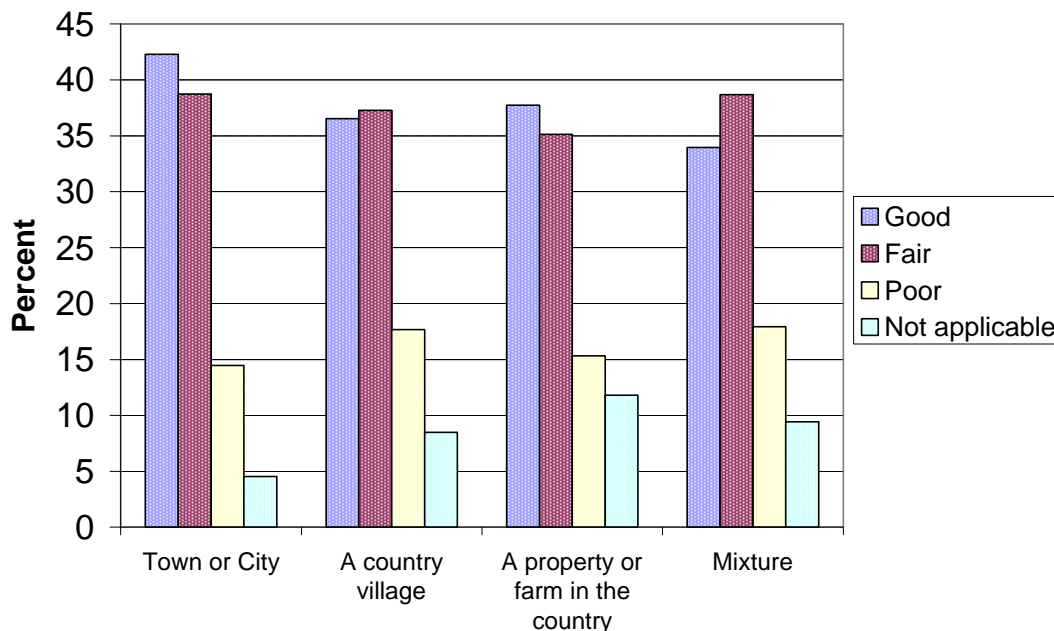
**Table 5.2 Rating NHS by Age Group**

Rating NHS	16-34	35-54	55+
Good	55%	63%	72%
Fair	32%	28%	21%
Poor	10%	8%	6%
Not applicable	3%	1%	1%

In the light of some media representations of the NHS, these results could be considered counterintuitive. As those over 55 years were most likely to have used the NHS, which does not, in general, receive media approval, one might have expected them to be the most critical, whereas in the survey they were the most positive.

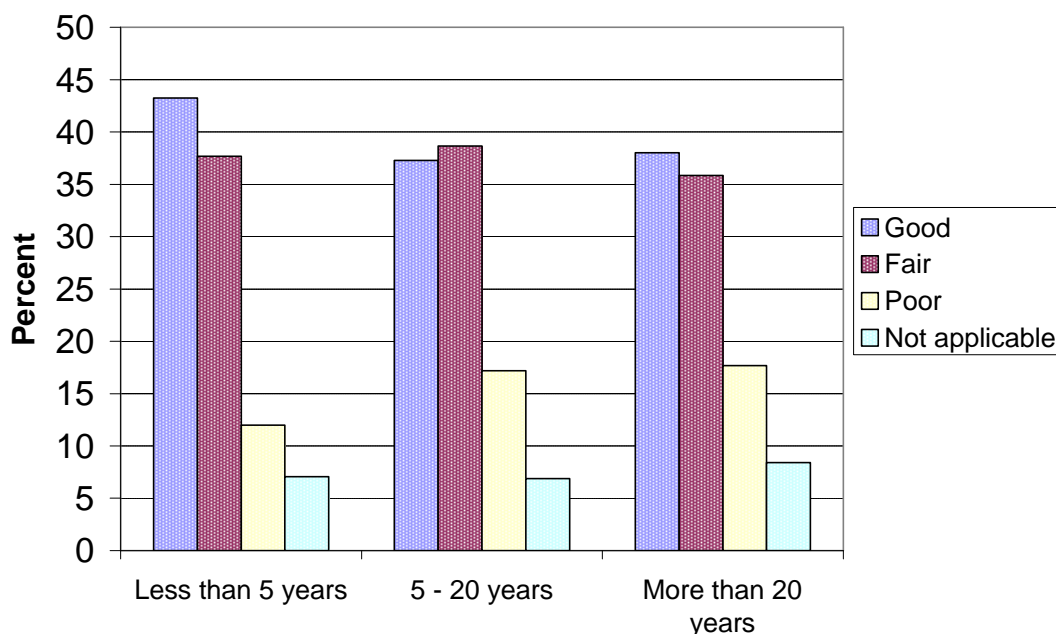
5.4 There was also a trend for respondents living in towns or cities to hold higher opinions of the police service than those living in more rural locations. These results are shown graphically at Figure 5.1

**Figure 5.1 Quality of policing by Area self-definition**



5.6 There appeared to be an inverse relationship between length of residence and how the police service was rated; those residing in a place for longer periods tended to rate the police less favourably. These results are shown graphically at Figure 5.2

Figure 5.2 Quality of Policing by length of residence



5.7 Table 5.3 shows that where respondents lived appeared to be a strong determinant in rating public transport.

Table 5.3 Rating Public Transport by location of residence

Rating Public Transport	Town or City	Country Village	Farm or Countryside	Mixture
Good	45%	33%	17%	35%
Fair	26%	29%	23%	29%
Poor	16%	29%	44%	31%
Not applicable	12%	10%	17%	6%

As the table shows, those respondents who lived in, what they defined as, urban locations held higher opinions of public transport than those living in more rural areas, while those who lived on farms or in the countryside held the lowest opinions of public transport. Indeed, the 45% of respondents living in a town or city who felt the service was 'good' were matched by

the 44% of those living in a property or farm in the country, who considered the service to be 'poor'. Given the higher density of public transport provision in more urban areas, these results were unsurprising but, nevertheless, convincing in their reinforcement of widely held perceptions of problems with public transport in rural areas.

5.8 Table 5.4 shows that lower income groups tended to rate public transport higher than higher income groups. This trend was most clearly shown by those who rated public transport as 'good', with 45% approval in the lower income groups,

compared to 25% for the highest income group. Similarly, while the 'fair' ratings showed little differentiation, 21% of the lower income groups rated public transport as 'poor', compared to 30% of the highest income group.

**Table 5.4 Rating Public Transport by Income Group**

Rating Public Transport	Under £5K pa	£5,000 – 9,999	£10,000 – 15,499	£15,500 – 20,999	£21,000 – 30,999	£31,000 – 52,000	Over £52K pa
Good	39%	45%	42%	34%	34%	33%	25%
Fair	25%	26%	24%	28%	28%	30%	29%
Poor	24%	21%	23%	28%	26%	26%	30%
Not applicable	13%	8%	11%	10%	11%	11%	16%

As shown in Section 7 of this report, the higher income groups tended to have more motor vehicles and to use them more frequently. This trend might be considered to be consolidated by the 16% of the highest income group for whom the issues of public transport was 'Not applicable', which implied that these respondents did not use public transport. Contradictorily, the second highest rating for 'Not

applicable' at 13% was for the lowest income group.

5.9 Approval ratings of the quality of schools were relatively high. This was particularly the case with respondents who spoke Welsh fluently or considered themselves as Welsh. In both categories, 73% felt that the quality of schools in their area was 'good'. These results are shown graphically at Figure 5.3 and Figure 5.4.

Figure 5.3: Perceptions of quality of schools by Welsh language ability

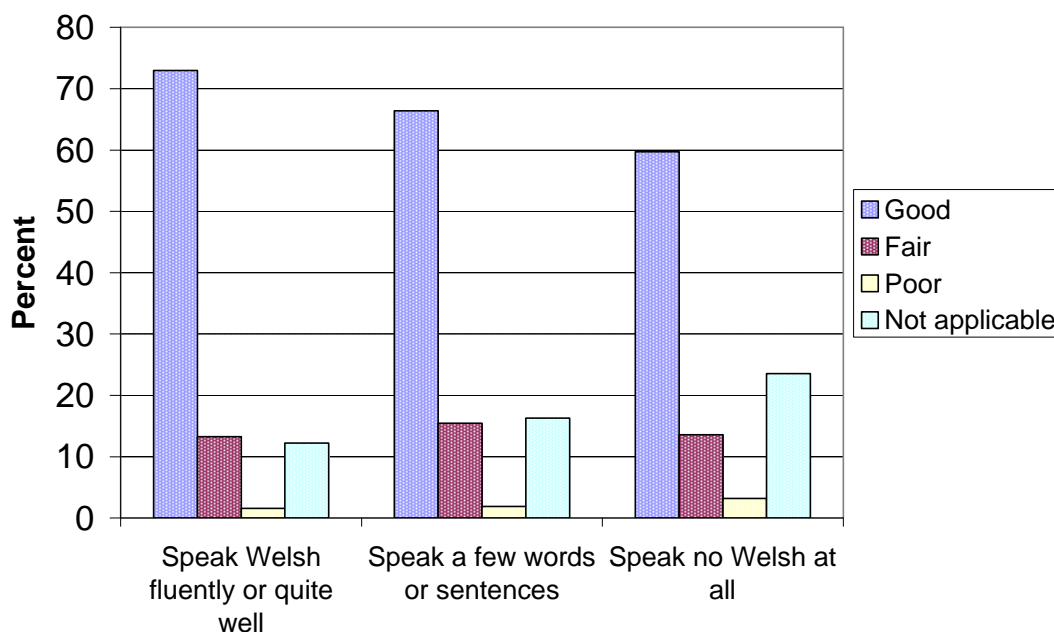
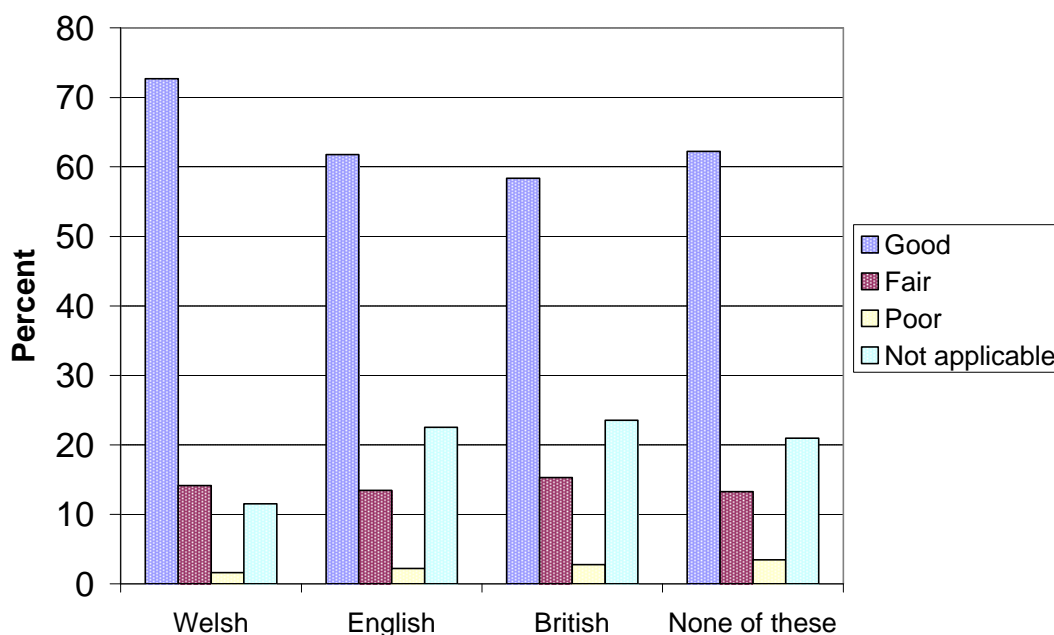


Figure 5.4: Perceptions of quality of schools by nationality

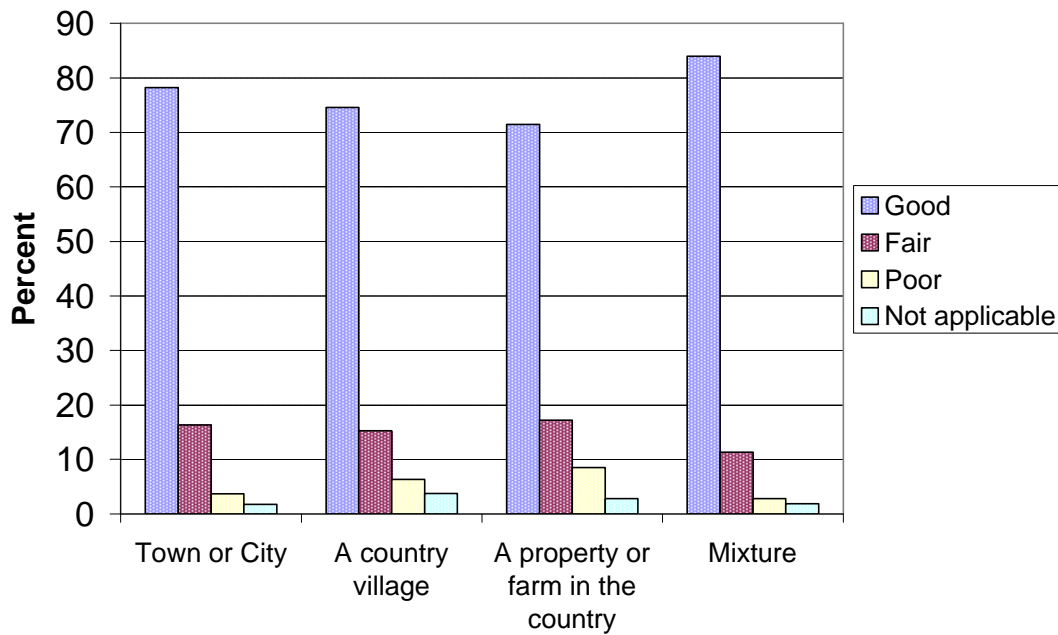


5.10 With regard to the quality of food shops, while the majority of respondents expressed approval, those living in a country village, on farms, or in the countryside tended to be more negative.

5.11 Approval levels of the Post Office were uniformly high. The results from the survey according to the type of settlement where people lived are shown graphically at Figure 5.5



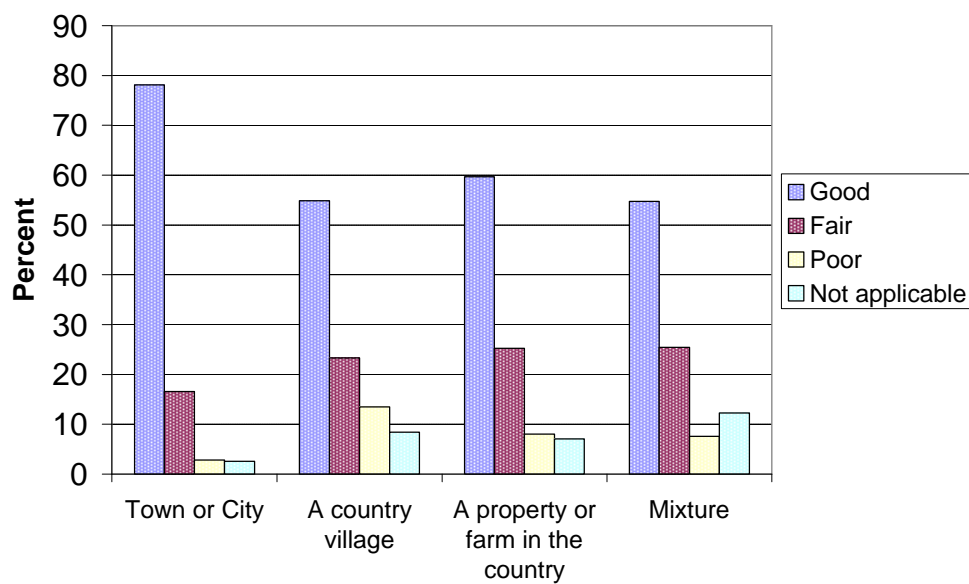
**Figure 5.5 Perceptions of the quality of the Post Office by area self-definition**



5.12 Unsurprisingly, concerning the provision of banks and building societies, the responses from the town or city tended to be more positive than those from more

rural areas. The results for area self-definition are shown graphically at Figure 5.6

**Figure 5.6 Quality of banks & building societies by area self-definition**



5.13 Responses concerned with the quality of leisure facilities and community centres followed a similar pattern to banks with respect to location of residence. Respondents who lived in what they defined as a town or city tended to be more positive than those from more rural areas.

### Perceptions of other people's difficulties concerning local services

5.14 All respondents were also asked whether or not they thought that other people in their local area experienced difficulties with the following: accessing health services; getting to shops; accessing leisure facilities; the cost of leisure facilities; availability of public transport; and availability of schools. The question asked was: 'How many people in your local area do you think face problems concerning the following?'. Table 5.5 presents the responses to this question.

Table 5.5 - Perceptions of other people's difficulties with service provision

Total 4071	Accessing Health services	Getting to shops	Accessing leisure facilities	Cost of leisure facilities	Availability of public transport	Availability of schools
All	4%	2%	4%	3%	9%	2%
Most	12%	8%	10%	10%	15%	5%
Some	43%	47%	45%	42%	39%	26%
None	33%	39%	35%	27%	30%	58%
Don't know	7%	4%	7%	18%	7%	10%

The table shows that the availability of public transport was the issue perceived to present the greatest problems, with 9% of respondents perceiving that 'all' local people faced difficulties and relatively high response rates in the other categories of

difficulty. These results tended to consolidate those at 5.7 and 5.8. Apart from 'availability of schools', which appeared to be relatively non-problematic, all of the issues elicited a majority of responses that expressed concern.

## Key findings

- 76% of respondents rated the Post Office service as 'good'.
  - Rural respondents were less likely to rate the PO as 'good'.
- 26% of respondents rated Public Transport as 'poor'.
  - 45% of respondents living in a town or city rated Public Transport as 'good'
  - 44% of those living in a property or farm in the country rated Public Transport as 'poor'.
  - 9% of respondents perceived that 'all' local people faced difficulties with access to Public Transport.
- 67% of respondents rated the NHS as 'good'.
  - Approval of the NHS tended to rise with age.
  - 72% of the 55+ age group rated the NHS as 'good'.
  - Only 6% of those 55+ rated the NHS as 'poor'.
- Apart from Public Transport, Policing received the lowest ratings, with 16% of respondents rating Policing as 'poor'.
  - Respondents in towns tended to hold higher opinions of the Police.
- Welsh language and culture appeared to have a positive effect on how schools were perceived.
- Respondents living in a town or city were more likely to rate the quality of food shops, banks and building societies, and leisure facilities as good, compared to those living in more rural locations.

## SECTION 6 EMPLOYMENT

### Introduction

6.1 The economy of rural Wales is in a period of change. Broadly, there is a perceived shift from production towards consumption in rural areas. Land-based activities such as agriculture and forestry remain important as shapers of the landscape but are increasingly less important as employers and producers. Consumption-based activities such as tourism, sports and leisure are assuming greater importance for employment and farmers are increasingly required to both diversify into tourist and other consumption-based activities, and to move towards multi-functionalism.

6.2 Within this changing scenario the nature of and opportunity for employment assumes great importance for local people. Employment and other work related issues are important factors in personal welfare, household income and the local economy. By posing a range of questions designed to both provide indications about the economy of rural Wales and the perceptions of the local economy held by residents, this section examines the nature of employment and some characteristics of the workforce in rural Wales.

It focuses on the following themes:

- Employment circumstances
- Employment, Unemployment, Economic (In)activity
- Employment history
- Types of employment
- Business and workplace size
- Travel to work
- Employment opportunities
- Difficulties with employment

### Employment circumstances

6.3 The 4071 respondents were offered a range of options designed to indicate their employment situation. Table 6.1 below shows the proportions of the survey population in each category of employment, together with proportions by gender, age, income and social class.

**Table 6.1 Employment circumstances – all respondents**

[illegible]

6.4 For those respondents in employment, more males than females were in full time employment (44% and 29% respectively). Similarly, more males than females were self-employed (13% and 6% respectively). The situation was reversed for those in part-time employment with four times as many females (21%) than males (5%) in part-time employment. This was a similar result to the 2004 Household Survey.

6.5 However, the other categories of employment circumstance showed little gender differentiation except for 'long-term sick and disabled' and 'looking after the home'. The count was low in both of these categories but 4% of females against 2% of males were 'long-term sick and disabled'; and while 5% of females were 'looking after the home' the number (6) of males doing so was too low to record as a percentage. Only three (3) females and no males were on maternity or paternity leave.

6.6 Age differentiation across the survey categories was unsurprising. Full-time employment rates in the 55+ age group (15%) were considerably lower than the 16-34 (57%) and 35-54 (54%) age groups. For part-time employment the 55+ group (10%) was lower than the 16-34 (15%) and 35-54 (18%) age groups but there was a levelling-out for self-employment: 55+ (7%); 16-34 (7%); and 35-54 (12%). The remainder of the survey categories tended to follow an expected age-related trend. For example, 61% of

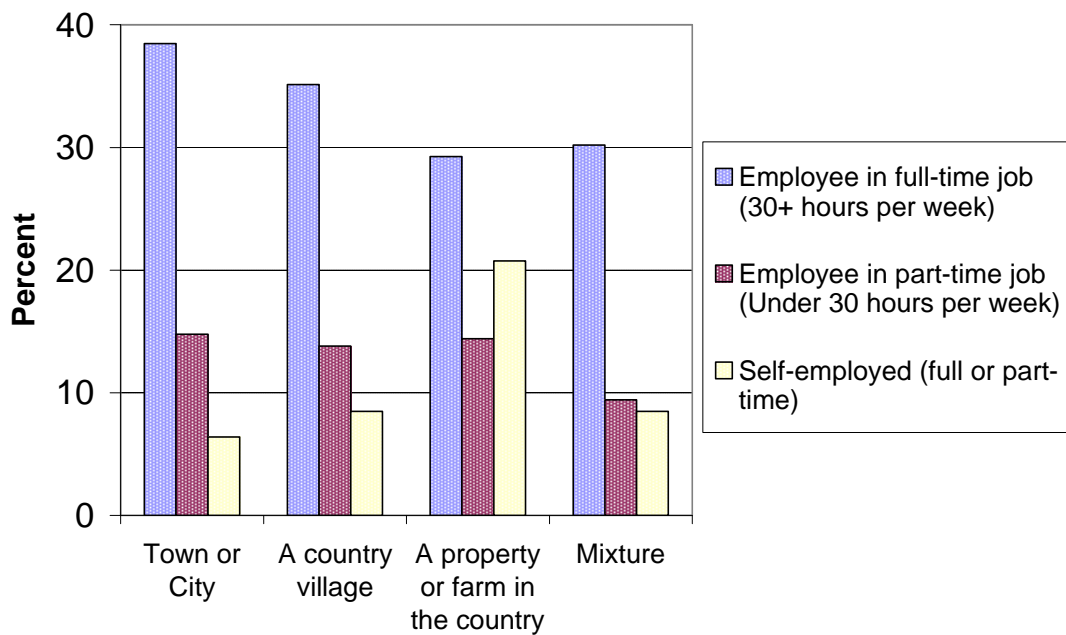
the 55+ age group was 'wholly retired from work'.

6.7 With respect to income and its relation to employment the trends across the survey categories tended to conform to expected patterns in relation to income groups. For example, of households with an annual income in excess of £52K, 56% had a household member in full-time employment, compared with 9% who were retired. At the other end of the income scale, retired households constituted 40% of those with an annual income of less than £5K. Both those in part-time employment and the self-employed were fairly evenly distributed across the income ranges.

6.8 Social class DE had considerably lower representation among those employed; more in the unemployed category; and more in the long-term sick and disabled. Also, more than half (53%) of those who had 'wholly retired from work' were in social class DE.

6.9 In terms of the type of place where people lived, no clear pattern emerged. However, there were relatively high levels of economic inactivity in all categories. These results are shown graphically at Figure 6.1

Figure 6.1 Modes of employment by area self-definition



6.10 Respondents were also asked about the employment status of other household members – up to five people aged over 16 years. This provided details for a further 3097 people, which added to the 4071 respondents provided employment status data for 8090 people. Of these, 1992 were retired, which left 6098 people eligible for potential employment. Table 6.2 provides details of employment circumstances. Percentages of less than unity are not shown.

Table 6.2 Employment circumstances for all people over 16 years of age in household

	2007 Count: 6098	2007
Full Time	3097	51%
Part Time	993	16%
Self-employed	646	11%
Govt Training	19	-
Full Time Education	535	9%
Unemployed	198	3%
Long term sick/disabled	222	4%
Looking after home	198	3%
Maternity leave	13	-
Doing something else	136	2%
Don't know	41	1%



## Employment, Unemployment and Economic Inactivity

6.11 For definitional purposes, The International Labour Organisation (ILO) broad measure of unemployment corresponds to the category in the survey: 'Unemployed and available for work'. Those who are Economically Inactive are people neither in employment nor unemployed on the ILO and survey measure.

6.12 Employment includes employees, the self-employed, people on government supported training and employment programmes, and unpaid family workers.

6.13 Using the ILO measure for unemployment outlined above, the proportion of people, both respondents and others in their households, who were unemployed was 3.2%. This was the same proportion identified by the 2004 survey.

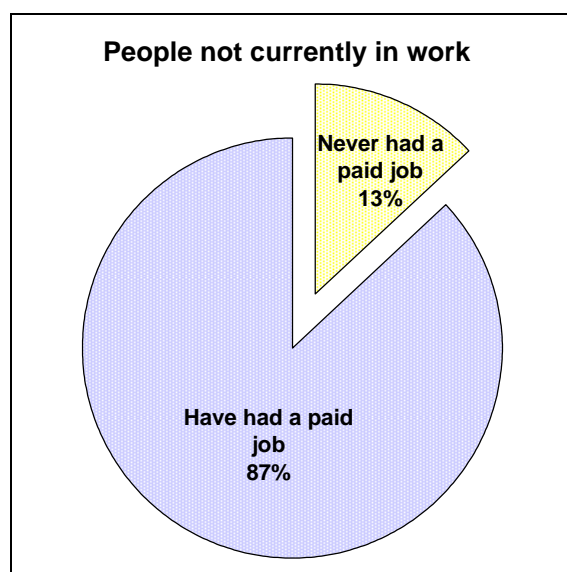
6.14 The rate of economic inactivity in this survey of rural Wales was 30%. A large proportion (25%) of the economically inactive on the survey was retired. In addition, 2% were 'doing something else', which compares with the 2004 result of 1%.

## Employment history

6.15 Those respondents not currently working were asked whether or not they had ever had a paid job. The same question was asked of all respondents about other household members, aged over 16 years, who were not currently working. According to the survey, there were 1671 respondents not currently

working and 1642 other household members not currently working, giving a total of 3313 people not currently working. Of these, 87% had, in the past, had a paid job and 13% had never had a paid job. These results are shown graphically at Figure 6.2 below.

**Figure 6.2 Employment history of people not currently in work**



## Employment Sectors

6.16 All respondents who currently worked, or had previously worked, were asked what was the main activity of their current or last workplace. In addition, this question was asked on behalf of up to five other household members over the age of 16 years. This yielded a total of 7632 responses (an adjustment was made for those household members who gave two responses). 45 categories of workplace were recorded. Some of these categories had a low count, in some cases in single figures. Table 6.3 shows the 20 categories of workplace activity that recorded sufficient counts to produce an integer percentage result, when rounded-up.

**Table 6.3 Employment categories**

Category	Total: 7632	Category	Total: 7632
Agriculture, hunting & forestry	4%	Public administration & defence (Council, civil service)	12%
Mining & quarrying	1%	Education	12%
Manufacturing	8%	Health & social work	15%
Electricity, gas & water supply	3%	IT	1%
Construction	6%	Cleaners/domestics	1%
Wholesale and retail: repair of motor vehicles	11%	Charity	1%
Hotels and catering	6%	Entertainment/media	1%
Transport, storage & communications	4%	Sports/leisure centres/sports coaching	1%
Banks, building societies & financial services	3%	Engineering (unspecified)	1%
Real estate, renting & business activities	1%	Others	7%

6.17 The results show the comparative decline in importance of Agriculture and Forestry, which recorded 4%. Importantly, although significant percentages were recorded for Manufacturing (8%), Wholesale and Retail (11%), and Hotels and Catering (6%), taken together, Public administration, Education and Health and Social Work accounted for 39% of employment. This high proportion accords with the results at 6.14 and Table 6.4, which show that 'Public Sector Bodies' accounted for 33% of workplaces.

6.18 Of those respondents and household members currently in work, 7% held more than one paid job, which compares to 11% on the 2004 survey. 2% did not reply to this question.

#### **Business size**

6.19 All respondents currently in work (2392) were asked to describe their place of work in terms of business size. Where applicable, respondents were also to describe the workplaces of other family members currently in work, in the same terms. This yielded a population of 4740. Table 6.4 shows the recorded results.

**Table 6.4 Size of place of work**

Category	Total: 4740
A small private enterprise employing less than 10 people	24%
A small private enterprise employing 10 – 24 people	8%
A medium private enterprise employing 25 – 100 people	10%
A large private enterprise employing more than 100 people	20%
A public sector body	33%
A voluntary sector organization	1%
Self-employed	1%
Others	1%
Don't know	1%

6.20 Table 6.4 shows that the largest employment sector was 'Public Sector Body' at 33% followed by small private enterprises (firms employing less than 24 people) at 32%, and large firms employing more than 100 people (20%). The Public sector and small private enterprises, then, accounted for 65% of employment in rural Wales.

### Travel to work

6.21 All respondents currently in work were asked how far away their place of work was from home. Table 6.5 shows the results.

**Table 6.5 Distance from place of work**

Distance from place of work	Total: 2392
Work at or from home	11%
Less than 5 miles from home	34%
5 – 10 miles from home	20%
11 – 20 miles from home	16%
21 – 49 miles from home	9%
50 or more miles from home	4%
No fixed place of work	5%

From Table 6.5, the majority worked reasonably close to home, with 45% at less than 5 miles from home, which compares to the 2004 survey result of 50%, and 65% worked at a distance of less than 10 miles from home. For both the 2007 and 2004 surveys the proportion of people working at home was 11%. There was, however, a substantial minority who commuted long distances. For example, 29% travelled over 10 miles to work, which is close to the 2004 figure of 31%.

6.22 With respect to income, the lower income groups were more likely to work either at home or closer to home. For example, 28% of those in the 'less than £5K pa' bracket worked at home, compared to 12% in the '£52K or more pa' bracket. At the other end of the distance scale, of those working more than 50 miles from home, only 1 person was in the 'less than £5K pa' bracket, while in the '£52K or more pa' bracket 26 people or 26% travelled 50 miles or more to work. This trend of distance travelled against income was replicated in all categories. The 2004 survey found a similar relationship between distance travelled to work and income.

Greater proportions of respondents living in properties or farms in the countryside (28%) worked at home than those living in villages (10%) or towns (7%). A similar relationship was noted on the 2004 survey.

6.23 Those respondents who travelled to work (2122) were asked what mode of transport was used. Table 6.6 below shows these results.

**Table 6.6 Mode of transport to work**

Mode of transport	Total: 2122
Household owned motorised transport	79%
In or on other person's motorised transport	6%
Bus	4%
Train	1%
On foot	13%
Bicycle	2%
Other	1%

The majority (79%) travelled to work by private motorised transport, with a further 6% using other people's motorised transport. A substantial minority (13%) either walked or ran to work. Bicycle usage was low at 2%. The low usage of public transport at 5% suggests inadequate public transport provision in rural areas, which reinforces the low ratings for public transport in 5.2 of this report.

## Employment opportunities

6.24 All respondents were asked the question: Over the last five years has the range of employment opportunities in your local area improved, got worse, or not really changed? The responses are shown at Table 6.7.

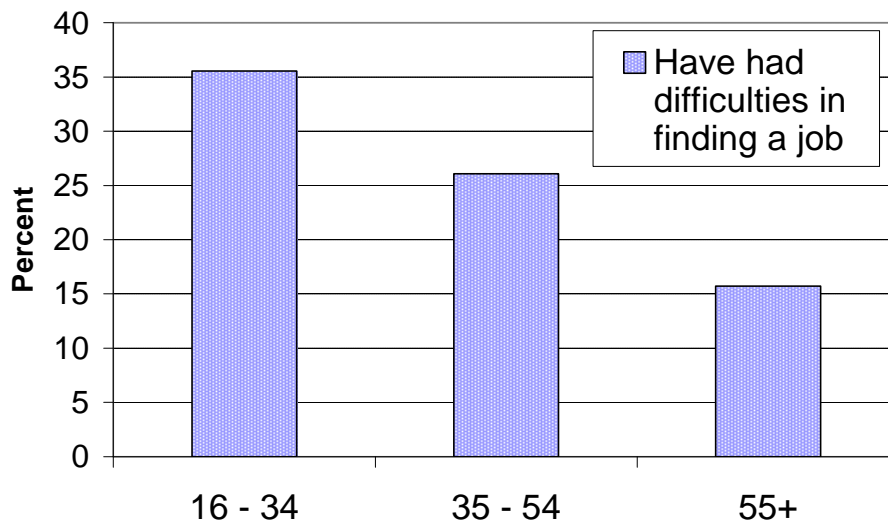
**Table 6.7 Perceptions of employment opportunities**

Response	Total: 4071
Improved a great deal	3%
Improved a little	13%
Not changed	51%
Got a little worse	12%
Got a lot worse	8%
Don't know	14%

Just over half of the respondents thought that the situation regarding employment opportunities had 'not changed'. Of those who had observed change, 20% thought that the situation was worse, and 16% thought that it had improved to some extent.

6.25 All respondents of working age were asked about the difficulties of finding a job locally, and 24% had experienced some difficulties. Of those experiencing difficulty, 23% were in the age group 16-34; 56% in age group 35-54; and 21% were over 55 years. However, 36% of respondents of age (16-34) had experienced difficulties, which was the highest proportion of the three age groups (35-54 was 26%, and 55+ was 16%). Unsurprisingly, at 12% the 55+ had the highest proportion of people to whom the question did not apply. These results are shown graphically at Figure 6.3.

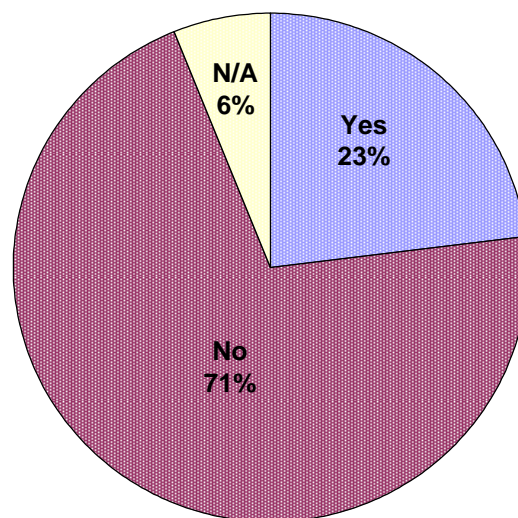
**Figure 6.3 Difficulty in finding employment by age group**



6.26 Experience of difficulty in finding employment appeared to be fairly evenly distributed across income groups, apart from those earning less than £5,000 pa. 35% of this group had experienced difficulties, although it should be noted that absolute numbers were low in this group. The other income groups had a range of 22% - 29%, with a trend towards less people in higher income groups experiencing difficulties.

6.27 Respondents were also asked about the difficulties experienced by other family members of working age. This question yielded 5548 responses about local people of working age, of whom 23% had experienced difficulties in finding a suitable job locally, 71% had not, and 6% considered the question inapplicable. These results are shown graphically at Figure 6.4.

**Figure 6.4 Proportion of the survey population (including other family members) who had experienced difficulties in finding employment**



6.28 Those respondents who had experienced difficulties finding jobs locally

(751) were asked what type of difficulties had been experienced. In addition, the same question was asked about other family members (516) who had experienced difficulties in finding a job

locally. All categories of difficulty recorded for these 1267 people are shown at Table 6.8 below. Note that counts in some of the categories were insufficient to produce an integer percentage.

**Table 6.8 Reasons for difficulty in gaining employment**

Difficulty	Proportion	Difficulty	Proportion
No/Not enough jobs	42%	Childcare too expensive	-
No/Not enough suitable jobs	37%	Shortage of training centres	1%
Not enough suitable jobs for women	1%	Shortage of land for development	-
Not enough suitable jobs for men	1%	Transport problems/hard to get to places with jobs	6%
Too few opportunities for school leavers	1%	Language barriers	5%
Too few opportunities for graduates	3%	Salary	4%
Too much seasonal employment	1%	Ageism/my age is a problem	1%
Not enough part-time/flexible work	3%	Lack of qualifications	1%
Not enough full-time work	2%	Lack of opportunity for promotion	-
Too few opportunities for disabled	2%	Health problems	-
Too many jobs filled by people from outside of the area	1%	No local jobs	1%
Too much reliance on a few employers	1%	Others	3%
Shortage of child-care facilities	1%	No answer	1%

The predominant reason given for difficulty in gaining employment was 'No or Not enough jobs' at 42%. Taken together with 'No or Not enough suitable jobs' (37%), this indicated that there was a basic shortage of employment opportunities.

6.29 All other reasons recorded single figure percentages. Among a few categories notable for their low results were 'Too many jobs filled by people from outside of the area' and 'Ageism', both at 1%. 'Transport problems' recorded 6%, which might have been expected to be higher in rural areas.

6.30 A notable result was 'Language Barriers', and 45 respondents (5%) said

that language was a barrier to gaining employment, with a further 13 other household members reported as experiencing difficulty because of language. Of the 45 respondents, eight considered themselves to be Welsh – the remaining 37 considered themselves to be English, British, Scottish or Irish, with one person American/Canadian. Linguistically, of the 45 respondents experiencing difficulty due to language, one spoke Welsh fluently, two ‘quite well’, 36 ‘a few

sentences or words’, and six did not speak any Welsh.

6.31 All respondents were asked if they thought that other people in the local area were experiencing problems with a range of employment related issues: finding employment; low wages associated with local jobs; the quality of jobs in the local area; and training or skills. Table 6.9 shows these responses.

**Table 6.9 Perceptions of other people’s difficulties with employment issues**

Total 4071	Finding employment	Low wages for local jobs	Quality of jobs locally	Training or skills
All	6%	10%	7%	3%
Most	22%	32%	28%	11%
Some	50%	39%	44%	42%
None	11%	7%	8%	25%
Don't know	11%	13%	12%	19%

A large proportion of respondents (78% – 81%) considered that a certain number of people in the local area were experiencing difficulties with three of these issues. The exception was ‘training or skills’. For this category, 56% of respondents thought that local people were experiencing difficulty

with training or skills, while 25% thought that nobody in the local area was experiencing difficulty – a far higher proportion than for the other issues. In addition, for the training and skills issue, 19% did not know – again a higher proportion than for the other issues.



## Key findings

- Of the respondents and other household members:
  - 38% were in Full-time employment
  - 12% were in Part-time employment
  - 8% were Self-employed
- More males than females were in full time employment or were self-employed. The situation was reversed for those in part-time employment with four times as many females than males in part-time employment. This was a similar result to the 2004 Household Survey.
- Levels of self-employment were higher among people living on farms and in open countryside.
- Unemployment at 2% was lower than the rates for Wales (5%) and UK (6%). But Employment (67%) was lower – Wales (72%); UK (75%), while Economic Inactivity (30%) was higher – Wales (24%); UK (21%).
- 30% of respondents were retired, while 2% were 'doing something else'.
- 13% of those surveyed had never had a paid job.
- Agriculture, hunting and forestry continue to decline in importance, providing 4% of jobs on the survey, compared to 6% on the 2004 survey.
- Taken together, Public administration, Education and Health and Social Work accounted for 39% of employment – compared to 44% on the 2004 survey.
- Of those respondents in work, 32% were employed by small private enterprises (firms employing less than 24 people).
- 23% of respondents of working age had encountered difficulties in finding suitable employment in their local area. Younger respondents (16-34) were more likely to experience difficulties.
- The majority of respondents in paid employment worked at or close to their homes. A substantial proportion (29%) travelled more than 10 miles to work. This is similar to the 2004 result of 31%.
  - Respondents from lower income households are more likely to work close to home than those with higher incomes.
  - 85% travelled to work by private motorised transport.

## SECTION 7 ENVIRONMENT

### Introduction

7.1 In recent years issues concerning the natural environment, and the effects that human activities have on it, have come to the fore. The landscape qualities and wider natural resources of rural Wales mean that many environmental issues have potential significance for people living there. This section explores how the people of rural Wales perceive their natural environment; their attitudes to emerging and significant environmental issues; and how they are addressing some of these issues.

It focuses on:

- The quality of the broader natural environment
- Concerns such as global warming
- The use of motorised transport
- Attitudes towards energy conservation
- Attitudes towards re-cycling

### Perceptions of the natural environment

7.2 Respondents were asked about their perceptions of change in the natural environment over the last five years. Just

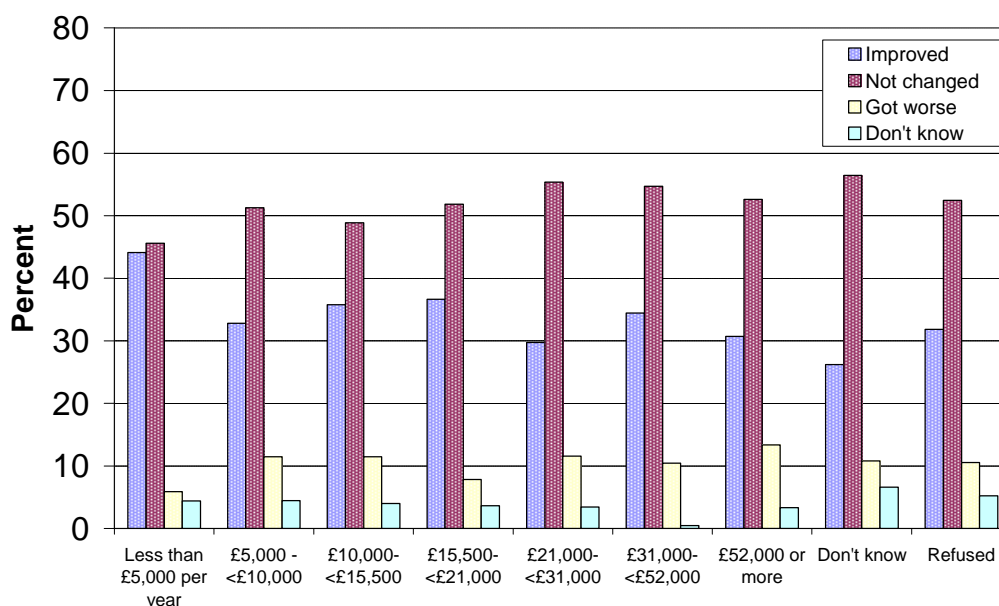
over half of respondents (53%) considered that the natural environment had not changed over the period, while 4% were uncertain. Of those 43% who did perceive change, 32% perceived an improvement and 11% thought that the natural environment had deteriorated. Table 7.1 shows the results.

**Table 7.1 Perceptions of change in the natural environment**

Response	Total: 4071
Improved a great deal	7%
Improved a little	25%
Not changed	53%
Got a little worse	8%
Got a lot worse	3%
Don't know	4%

7.3 There was a noticeable variation in terms of income, with the lower income group displaying greater optimism about improvements to the environment. Table 7.1 below shows these relationships graphically.

**Figure 7.1 Quality of the environment by income group**



7.4 There was, however, little variation in perceptions of the environment across age groups, gender and social class, with respondents fairly evenly divided concerning each grade of perception of environmental change.

### Broader environmental concerns

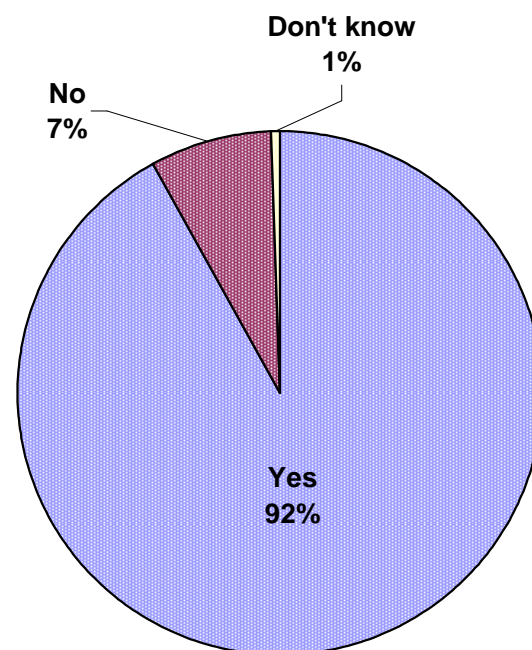
7.5 Respondents were asked a series of questions designed to elicit their attitudes to, and concerns about, environmental issues such as global warming, potential energy shortages and GM foods. Table 7.2 shows the extent to which environmental concerns had made respondents think about environmentally enhancing actions such as recycling and energy saving.

**Table 7.2: The extent to which environmental concerns have made people think about recycling or reducing household heating or lightning**

Response	Total: 4071
A great amount	45%
A fair amount	35%
A little	12%
Not at all	7%
Don't know	1%

From Table 7.2, combining the three answers that indicate thinking about environmental action shows that 92% of respondents had, to varying degrees, thought about how they or their household could act towards alleviating potential harmful effects on the environment. Only 7% had not thought about taking such action, and only 1% was uncertain. These results are shown graphically at Figure 7.2.

**Figure 7.2 Proportion of survey population considering environmental action**



7.8 More females than males had thought about taking environmentally enhancing action (95% and 89% respectively). However, age, income and social class were not strong determinants of thinking about environmental conservation action.

### Practising energy conservation

7.9 Researchers posed some questions about the extent to which respondents practised energy conservation. These questions concerned whether or not respondents had, or were considering a range of energy conservation measures: loft insulation, double glazing, cavity wall insulation, energy saving light bulbs, solar panels, and wind powered generators.

7.10 Loft insulation is perhaps the easiest, cheapest and most cost effective method of conserving energy in a household context, and its use has been advocated widely through government policy, building regulations and standards, advertising and price initiatives, some related to benefits, age and disability, for at least thirty years.

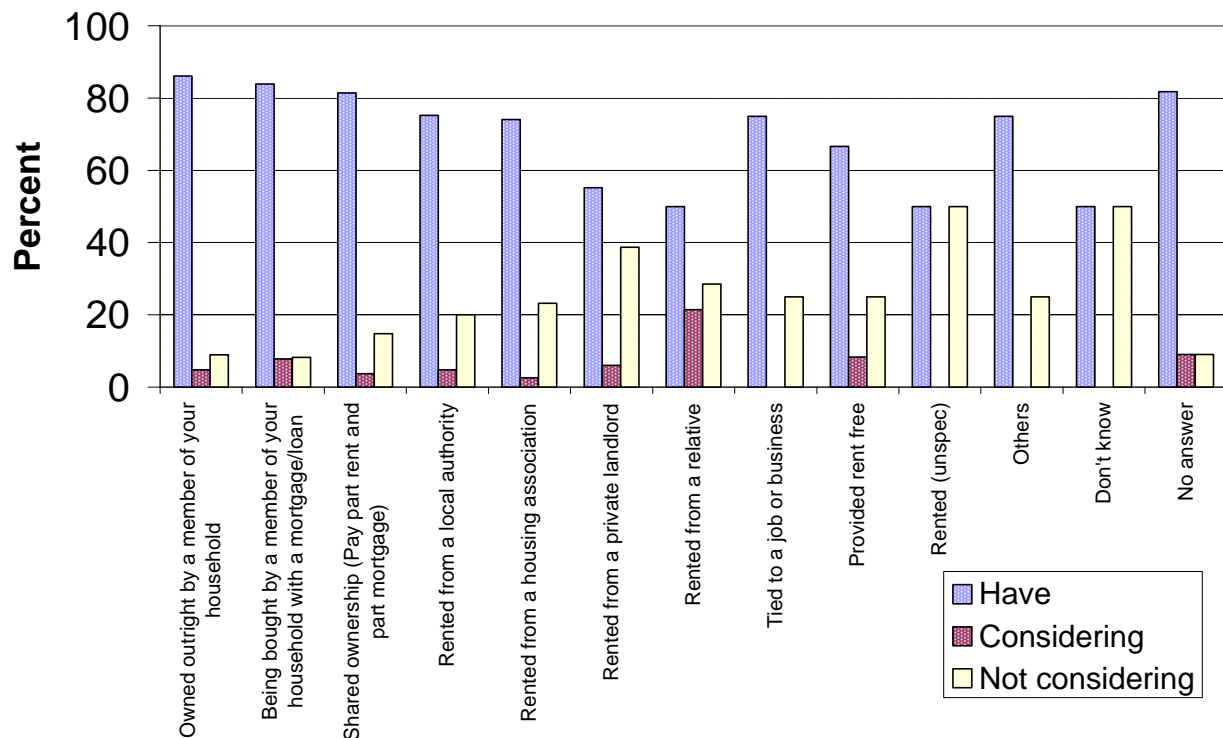
It is difficult to think of cases where it is not possible to install some form of loft insulation, although there may be instances where heritage conservation legislates against it.

It was surprising, then, that with 82% of respondents having loft insulation, 18% (nearly one in five households) did not. The 18% without loft insulation consisted of 6% who were considering it and 12% who were not. That is, twice as many of those without loft insulation (734 respondents)

were not considering it as were giving it consideration.

7.11 In terms of tenure, 87% of those respondents who had loft insulation lived in a property that they owned outright or with a mortgage. Looked at another way, 85% of respondents living in properties that they owned outright or with a mortgage had loft insulation. Against these data, 69% of respondents in rented accommodation had loft insulation. These results are shown graphically at Figure 7.3.

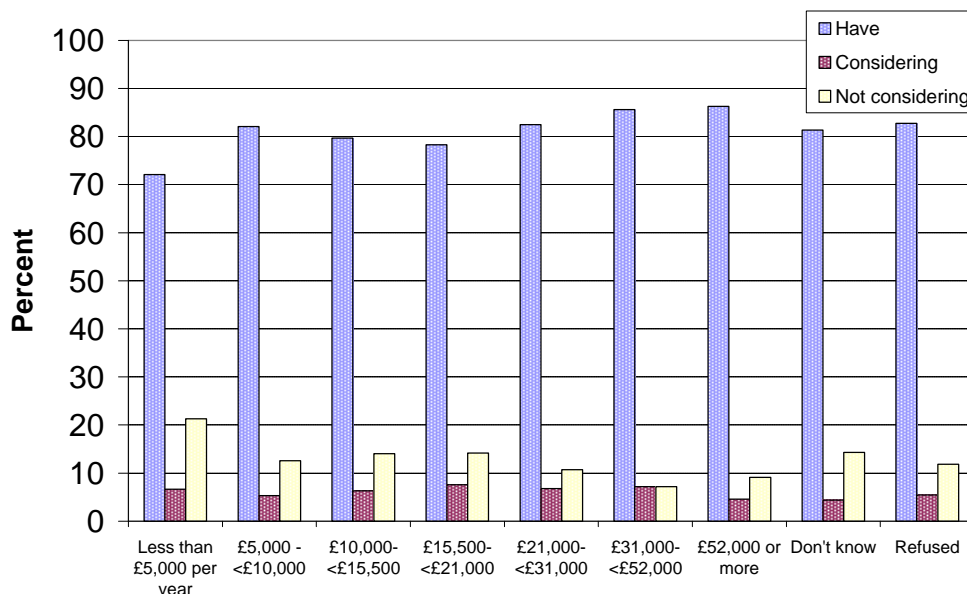
Figure 7.3 Loft insulation by tenure



7.12 Possession of loft insulation tended to rise with income. The proportion of households without loft insulation in the lowest income bracket (under £5K pa) was 28%, which is approaching one in three households. Moreover, in this income

bracket, 29 of the 38 households (76%) without loft insulation were not considering it. Unsurprisingly, the two highest income groups had the highest proportions of loft insulation, with both at 86%. These results are shown graphically at Figure 7.4.

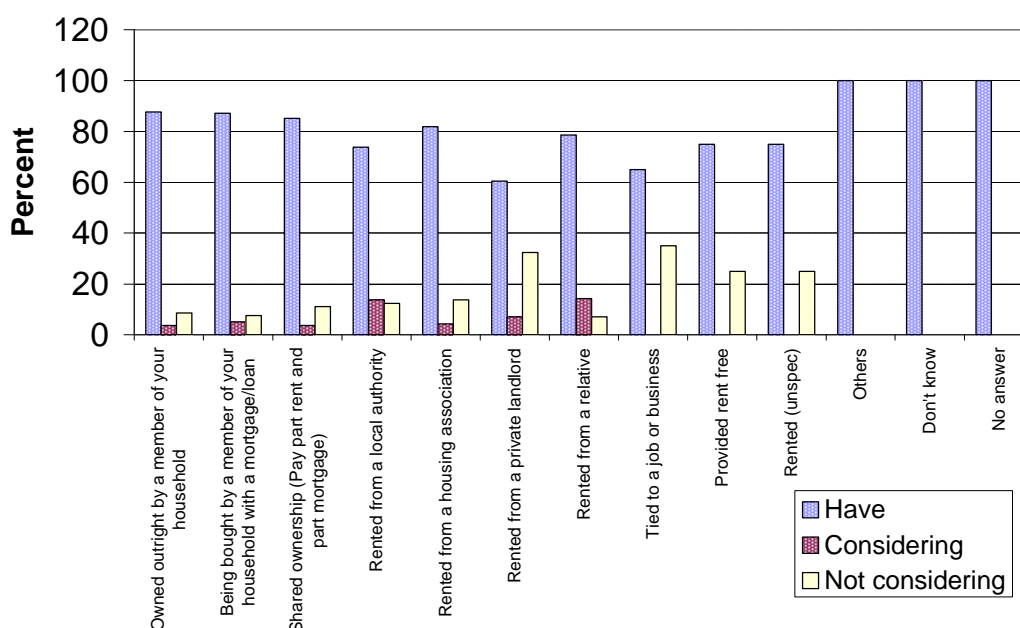
Figure 7.4 Loft insulation by income group



7.13 Surprisingly, more households had double glazing than had loft insulation, with 85% of respondents answering positively. Of the 15% of households without double glazing, 5% were considering it and 10% were not. As with loft insulation, there may be instances where heritage conservation legislates against it.

7.14 Similarly to loft insulation, the strongest determinants were tenure and income. In terms of household tenure, 86% of those respondents who had double glazing lived in a property that they owned outright or with a mortgage, and 77% of respondents living in properties that they owned outright or with a mortgage had double glazing. At 69%, relatively few respondents in rented accommodation had double glazing. These results are shown graphically at Figure 7.5.

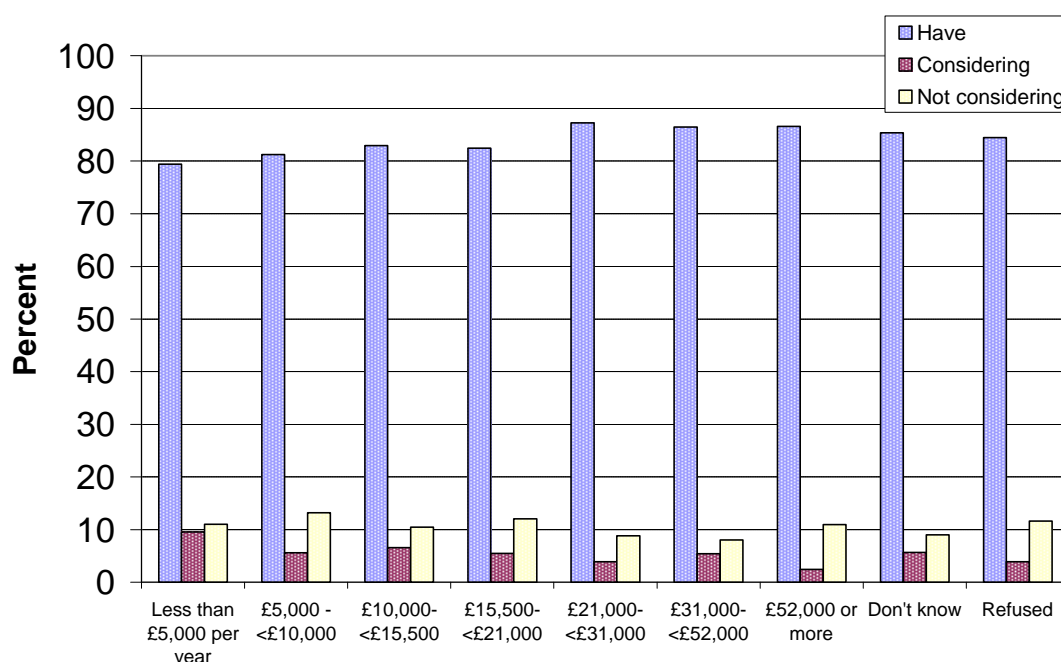
Figure 7.5 Double glazing by Tenure



7.15 With respect to income, 'having double glazing' showed an upward trend against increasing income. The lowest income bracket (less than £5K pa) turned

out at 79% possession, while 87% of the highest income bracket (over £52K pa) had double glazing. These results are shown graphically at Figure 7.6 below.

**Figure 7.6 Double glazing by income group**

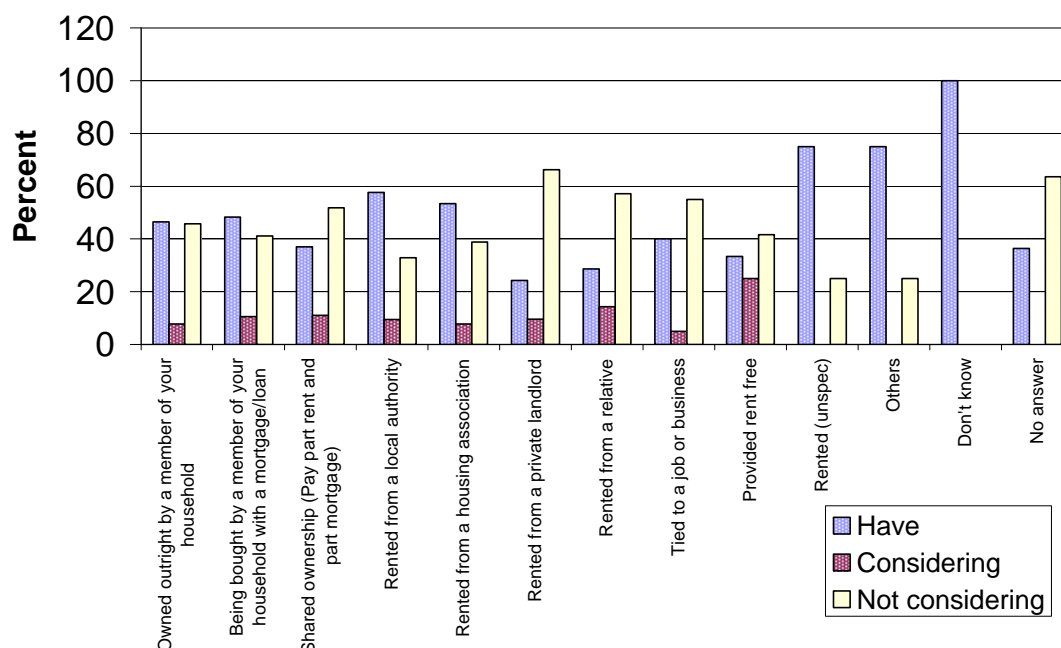


7.16 Cavity wall insulation, together with loft insulation and double glazing, is the third energy saving measure that has been marketed for a considerable time. At 46% nearly half of the respondents had cavity wall insulation and a further 9% were considering installation. It should be noted that some older properties have solid, non-cavity walls and cannot have cavity wall insulation.

7.17 As with loft insulation and double glazing, both possession and consideration of cavity wall insulation

tended to be positively correlated with rising income levels and home ownership. In terms of tenure, 84% of respondents with cavity wall insulation owned their property. However, the distribution of cavity wall insulation was relatively high in rented properties in the survey: 40% of respondents living in rented properties had cavity wall insulation compared to 47% of respondents living in properties that they owned outright or with a mortgage. The results for tenure are shown graphically at Figure 7.7.

Figure 7.7 Cavity wall insulation by tenure



7.18 Although energy saving light bulbs are a relatively new item, their use was high in the survey, with 87% having energy saving bulbs and a further 6% considering them. Usage was high in all categories of age, income, gender and class, with little variation between owned and rented properties.

7.19 Solar panels are also a relatively new energy conservation measure. Initial costs may be expensive and there could be planning and heritage conservation constraints. The out-turn for those households who 'had solar panels' was, then, low. With the low percentage of households having solar panels, absolute numbers at 116 were correspondingly small.

Considering the above factors, which could be perceived as weighing against solar panels, the 21% of respondents who were 'considering' solar panels – i.e. one in five households – was a high proportion.

7.20 With low absolute numbers it was difficult to identify a dominant factor but household tenure was the best candidate. Of those respondents who had solar panels, 89% lived in a property that they owned outright or with a mortgage. Illustrative of the anomalies arising from low absolute numbers, possession of solar panels in terms of income was counterintuitive, with the lowest income group having the highest proportion of solar panel ownership at 5%. Absolute numbers in this group were, however, the lowest of all income groups in terms of both overall representation and solar panel possession.

7.21 Solar panels were less common in rural towns than in villages, farms or the countryside. Of those respondents who had solar panels, 25% lived in town; 46% lived in a village; and 21% lived in a house or farm in the countryside.



7.22 Only 38 of the 4071 respondents had a wind powered generator. Such small numbers makes comparison across groups, and the identification of determinant factors, difficult. Tenure and location tended to stand out. Of those 38 respondents who had a wind powered generator, 79% (30) owned their property, and 79% were located in a country village or the countryside.

7.23 However, 617 (15%) of all respondents were 'considering' a wind powered generator for their property. Unsurprisingly, 'consideration' tended to be positively related to increasing income: 88% of those respondents who were considering a wind powered generator lived in a property that they owned outright or with a mortgage, and 69% were located in a country village or the countryside.

### Ownership and use of motorised transport

7.24 Ownership or use of motorised transport was, unsurprisingly, high at 90% of respondents. More males (93%) than females (88%) had the use of a motor vehicle. Of those respondents who owned a vehicle, 52% had more than one. The breakdown was: 48% had one; 39% had two; and 13% owned three or more vehicles.

7.25 With regard to age, in the 35 – 54 age group, vehicle ownership rose to 95%. For 16 – 34 it was 92% and for 55+ it was 86%. Multiple vehicle ownership followed a similar age profile. The 35 – 54 age group was the most likely to have multiple vehicle ownership, and 47% of the vehicle owners in this group had 2 vehicles and 16% had 3 or more. Age group 16 – 34 was close behind with 46% and 12% respectively. For the 55 + age group, results were 30% and 9%. These results are shown graphically at Figure 7.8 and Figure 7.9.

Figure 7.8 Vehicle ownership by age group

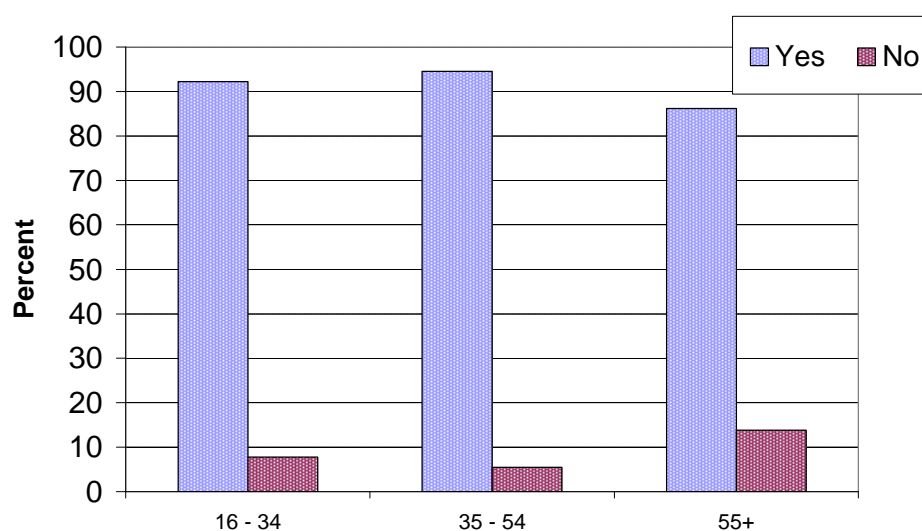
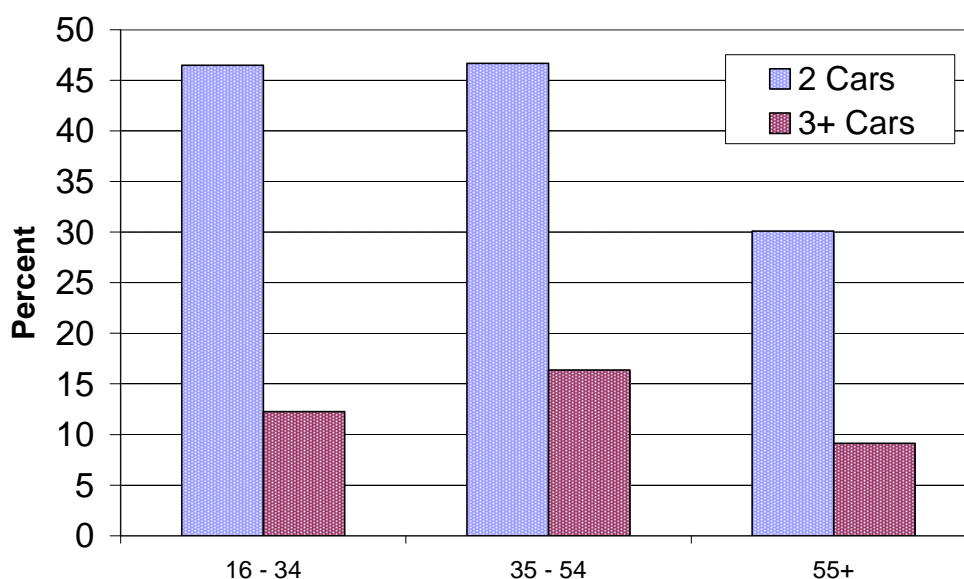


Figure 7.9 Multiple vehicle ownership by age group



7.26 As Table 7.3 shows, in terms of income groups there were smaller proportions of vehicle ownership in the lower income groups.

Table 7.3: Vehicle ownership by income group

Under £5K pa	76%
£5,000 – 9,999	68%
£10,000 – 15499	87%
£15500 – 20999	93%
£21000 – 30999	97%
£31000 – 52,000	99%
Over £52K pa	99%

7.27 There was also a correlation between income and multiple car ownership. Firstly, as Table 7.3 shows, a greater proportion of the higher income groups were vehicle owners. Secondly, Table 7.4 shows that, for those households that had vehicles, greater proportions of the higher income groups, were multiple owners. More than one in two vehicle-owning households with an annual income of more than £31,000 had two vehicles. For vehicle-owning households with an annual income of more

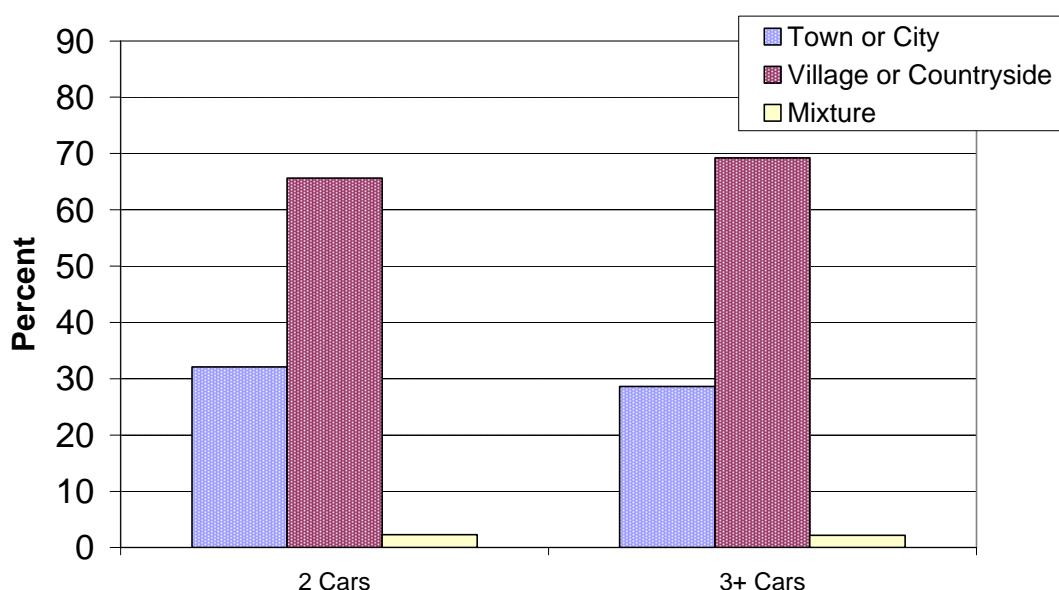
than £52,000, nearly one in three had three or more vehicles

Table 7.4: Multiple Vehicle ownership by income – Households owning vehicles

	1 vehicle	2 vehicles	3 or more
Under £5K pa	73%	18%	9%
£5,000 – 9,999	79%	17%	4%
£10,000 – 15499	69%	26%	5%
£15500 – 20999	54%	39%	7%
£21000 – 30999	46%	41%	13%
£31000 – 52,000	28%	58%	14%
Over £52K pa	17%	53%	30%

7.28 In terms of location, 56% of respondents, who owned vehicles and lived in a village or the countryside had more than one vehicle. For town and city dwellers who owned vehicles this figure was 44%. Of those households with two vehicles 66% were in a village or the countryside. For those households with three or more vehicles, 69% were in a village or the countryside. These results are shown graphically at Figure 7.10.

**Figure 7.10 Multiple vehicle ownership by area self-definition**



7.29 An analysis by Social Class shows that car ownership was relatively low in social classes DE at 78%; while 96% of Social Class AB, 94% of Social Class C1, and 91% of Social Class C2 were vehicle owners.

7.30 A similar pattern was apparent when analysing multiple vehicle ownership by Social Class, as Table 7.5 shows.

**Table 7.5: Multiple Vehicle ownership by Social Class– Households owning vehicles**

Social Class	AB	C1	C2	DE
1 vehicle	37%	46%	47%	69%
2 vehicles	48%	41%	40%	24%
3 or more	16%	13%	13%	7%

7.31 All respondents who had a vehicle were asked for an estimate of their household's annual mileage. Table 7.6 shows these responses.

**Table 7.6: Annual household mileage**

Annual mileage	Total – 3677
Less than 1,000 miles	2%
1000 – 1999	4%
2000 – 2999	3%
3000 – 4999	5%
5000 – 9999	18%
10,000 – 14,999	21%
15,000 – 19,999	11%
20,000 or higher	27%
Don't know	8%

7.32 There was little gender differentiation apart from the highest annual mileage category (20,000 or higher). The households of 32% male respondents were in this high mileage category, with 24% female. Absolute numbers were similar at 500 from 1583 and 509 from 2094 respectively. The other category with a distinct gender difference was 'don't know': male 2% and female 13%.

7.33 Table 7.7 presents an analysis of annual mileage by age group. The standout results are in the highest mileage category (20,000 or higher), which is inhabited by 37% of both the 16 – 34 and 35 – 54 age groups. More generally, the two younger age groups tended to record higher annual mileages.

**Table 7.7: Household vehicle use by age group**

Annual mileage (miles)	16 – 34	35 – 54	55 +
Less than 1,000	1%	1%	4%
1000 – 1999	2%	3%	5%
2000 – 2999	1%	2%	5%
3000 – 4999	4%	3%	8%
5000 – 9999	10%	14%	23%
10,000 – 14,999	20%	20%	22%
15,000 – 19,999	13%	13%	9%
20,000 or higher	37%	37%	16%
Don't know	12%	7%	9%

7.34 Analysis of annual mileage against income revealed a tendency towards higher mileages for all income groups. Table 7.8 below aggregates those annual mileages of less than 5,000 – numbers in these categories were relatively low.

**Table 7.8: Household vehicle use by income group**

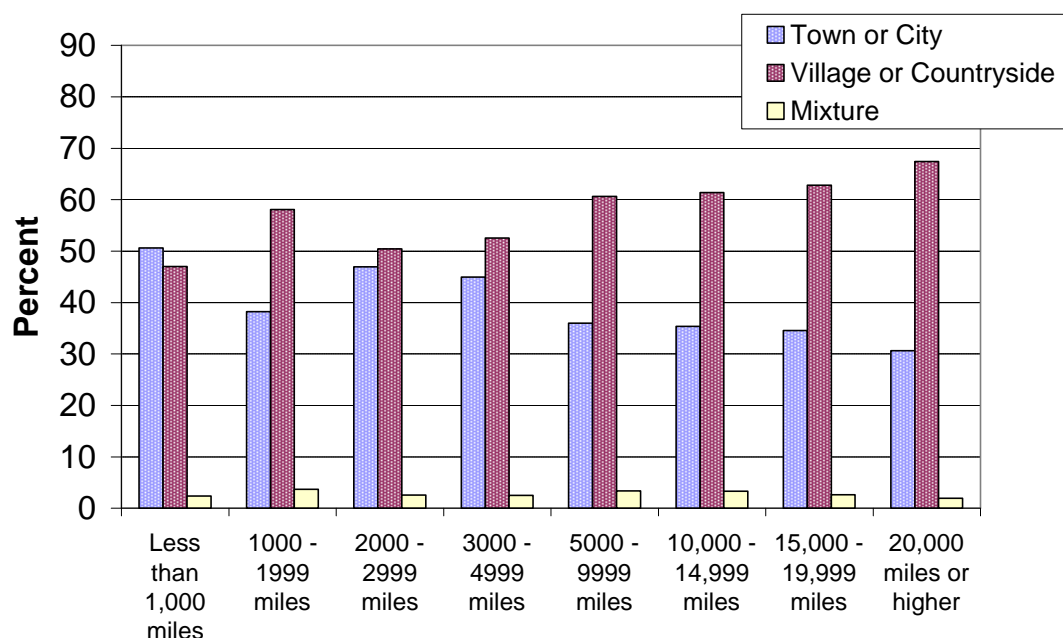
Annual mileage	Under £5K pa	£5,000 – 9,999	£10,000 – 15,499	£15,500 – 20,999	£21,000 – 30,999	£31,000 – 52,000	Over £52K pa
Less than 5,000 miles	31%	36%	23%	17%	8%	7%	4%
5000 – 9999	21%	25%	25%	23%	18%	12%	6%
10,000 – 14,999	16%	17%	26%	25%	23%	18%	13%
15,000 – 19,999	11%	5%	9%	9%	17%	14%	12%
20,000 or higher	16%	5%	9%	18%	27%	46%	63%
Don't know	6%	11%	7%	8%	7%	4%	3%

The table shows that lower income groups tended to have lower annual mileages. Standout results were the high proportions of the two highest income groups with annual mileages in excess of 20,000.

7.35 Unsurprisingly, people living a village or in the countryside tended to have higher annual mileages. For example, 64% of

respondents with an annual mileage in excess of 10,000 lived in a country village or the countryside. Reinforcing this observation, 67% of respondents with an annual mileage in excess of 20,000 lived in a country village or the countryside. These results are shown graphically at Figure 7.11.

Figure 7.11 Annual mileage by area self-definition



7.36 There appeared to be a tendency for Social Classes AB and C1 to have higher annual mileages. For example, 38% of AB and 31% of C1 had annual mileages of over 20,000.

7.37 Respondents were asked for their perceptions of how the dependency on personal motorised of their household had changed over the last five years. Table 7.9 shows these data.

Table 7.9: Household dependency on motorised transport over 5 years

Response	Total: 4071
Increased greatly	19%
Increased slightly	15%
About the same	57%
Decreased slightly	5%
Decreased greatly	4%

The majority of households considered that their dependency on motorised personal transport had stayed the same. But considerably more perceived that their dependency had increased (34%) rather than decreased (9%).

## Recycling

7.38 Respondents were asked questions about the range of recycling services provided in their local area. Table 7.10 charts these responses.

**Table 7.10: Provision of recycling services**

	Recycling collection from home	Separate household collection of green waste	Bottle banks and paper banks	Public access recycling sites
Provided	78%	55%	87%	81%
Not provided	22%	44%	13%	16%
Don't know	0%	1%	0%	3%

An optimistic point to note was the low results for 'Don't know'. Exploring these responses within Local Authority areas reveals some potential anomalies and contradictions. For example, in Denbighshire, of 311 respondents questioned about the provision of 'recycling collection from home', 57% responded positively, and 43% replied that the service was not provided. In Anglesey for the 'separate collection of green waste' the responses were 36% 'Yes' and 64% 'No'. For each of the four questions and for each of the 16 Local Authorities similar responses were received.

Two possible inferences are:

1. Local Authorities were providing services in some parts of their area and not in others.
2. Some respondents in localities where these services existed were not aware of them. These responses point to communication issues between Local Authorities and householders.

7.39 Table 7.11 shows the proportions of respondents with access to recycling services by type of settlement. Note that for this table the survey population is divided into three groups: town/city, village and countryside.

**Table 7.11: Provision of recycling services by settlement type**

% of respondents with access to services in settlement type	Recycling collection from home	Separate household collection of green waste	Bottle banks and paper banks	Public access recycling sites
Town/City	86%	66%	92%	85%
Village	79%	54%	84%	80%
Countryside	47%	21%	76%	75%

Provision of recycling facilities in rural towns appeared to be good, although separate collection of green waste could be higher. Villages seemed to be nearly as well provided for, but provision in the countryside was not as good, particularly

for separate collection of green waste and collection of recycling from home

7.40 Those respondents who stated that services existed in their local area were then asked if they used the services. Table 7.12 shows these responses.

**Table 7.12: Use of recycling facilities**

	Recycling collection from home	Separate household collection of green waste	Bottle banks and paper banks	Public access recycling sites
<i>Total with access to service</i>	3180	2238	3527	3315
Use	93%	84%	88%	87%
Don't use	7%	16%	12%	13%

There were relatively high rates of usage of these services. Generally, gender, age, income, social class and local authority were not determining factors.

**Table 7.13: Use of recycling services by settlement type**

% of respondents with access to services in settlement type	Recycling collection from home	Separate household collection of green waste	Bottle banks and paper banks	Public access recycling sites
Town/City	94%	87%	87%	84%
Village	93%	85%	87%	88%
Countryside	90%	62%	92%	75%

Use of all recycling facilities was uniformly high at between 84% - 94%, apart from two facilities in the countryside: public access recycling sites at 75%, and separate household collection of green waste in the countryside at 62%.

Countryside dwellers could have to travel a considerable distance to a public access recycling site. A possible explanation with respect to green waste was that householders in more rural locations tended to compost their green waste.



## Concerns about environmental issues

7.42 All respondents (4071) were asked how concerned they were about a range of environmental issues. Table 7.14 shows these responses.

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**Table 7.14: Concerns about environmental issues**

Degree of concern	Global warming	Energy shortages	GM foods
Very concerned	44%	38%	32%
Fairly concerned	41%	41%	26%
Not very concerned	9%	13%	22%
Not at all concerned	7%	8%	19%

The proportions of respondents 'very' or 'fairly' concerned about both global warming and energy shortages were relatively high at 85% and 79% respectively. These concerns were fairly evenly distributed across gender, age, income, social class and local authorities.

7.43 By contrast, 58% of respondents expressed the two highest degrees of concern about GM foods; 22% were 'not very concerned'; and nearly one in five respondents (19%) were 'not at all concerned' about GM foods. Again, these concerns were fairly evenly distributed across gender, age, income, social class and local authorities.

## Key findings

- While 53% of respondents did not perceive any change in the quality of the local natural environment, 32% thought that it had improved to some degree.
- 92% of respondents had, to varying degrees, thought about how they or their household could act towards alleviating potential harmful effects on the environment.
- 90% of respondents owned or had use of motorised transport.
  - 48% had one vehicle
  - 39% had two vehicles
  - 13% owned three or more vehicles
- 27% of households with a vehicle had an annual mileage of more than 20,000.
  - 67% of these respondents lived in a country village or the countryside.
- 34% of respondents with vehicles perceived that their dependency on their vehicles had increased over the last 5 years. 9% perceived a decrease.
- Access to recycling services was relatively high at around 80% of the respondents.
  - Separate collection of green waste was low at 55%
  - Access to recycling in the countryside was relatively low
- For those respondents with access to recycling facilities, use was high at around 90% for each type of facility, except for:
  - Green waste in the countryside at 62%.
- 85% of respondents were very or fairly concerned about global warming.
- 79% of respondents were very or fairly concerned about energy shortages.
- 58% of respondents were very or fairly concerned about GM foods.
  - 19% were not at all concerned about GM foods.