



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

Rural Services Survey 2010

CONTENTS

Outline of project	2
Methods	2
Structure of report	3
SECTION 1 Shops, Financial, Food and Drink	5
SECTION 2 Medical Services	14
SECTION 3 Education and Day-care	16
SECTION 4 Places of worship, information and welfare	22
SECTION 5 Recreation Facilities and Community Activities	29
SECTION 6 Transport	34
SECTION 7 Community Recycling	38
SECTION 8 Further analysis of qualitative material	40
SECTION 9 Longitudinal Changes 2004-2010	45
SECTION 10 Concluding Remarks	51

Outline of the project

This report provides an overview of results from a survey of rural services in Wales, which was conducted by the Wales Rural Observatory [WRO] in 2010. The 2010 survey is the third in a triennial series, following the 2004 and 2007 services surveys.

In keeping with the previous two surveys, the Community or Town Council was the spatial level of analysis (**termed 'community' onwards**), with the questionnaires being sent to the clerk of each community.

The 2010 survey explored service provision within each community; changes in the levels of provision; perceptions of service levels; quality and accessibility of services; and problems experienced by different groups. More broadly, the project provides evidence to allow the Welsh Government to monitor the impact of its policies and inform the implementation of the Rural Development Plan [RDP].

The questionnaire was divided into ten sections:

1. **Shops and Other Services** – e.g. permanent shops, post offices, farmers markets, food outlets, petrol stations, banks and buildings societies, and public houses,
2. **Medical Services** – e.g. GP surgeries, dental surgeries, pharmacies, health centres and hospitals,
3. **Education and Day Care** – e.g. pre-school facilities, schools, and day-care services for the elderly or disabled,
4. **Places of worship**
5. **Information and Welfare** – e.g. libraries, internet facilities, broadband, support services for vulnerable groups and advice services,
6. **Recreation Facilities and Community Activities** – e.g. meeting places, play areas, sports facilities and clubs or groups for the young or elderly,

7. **Transport** – including bus, train and community transport,
8. **Crime Prevention** – crime prevention measures and advice
9. **Community Recycling** – bottle banks, clothes, paper, cans and plastic recycling.
10. **Additional Information** – qualitative information provided by respondents on various aspects of service provision in the community.

Methods

All communities in Wales were sent a questionnaire in English and Welsh, with a covering letter detailing the research project, the Wales Rural Observatory, and why it was important to contribute to the research. The letter also acknowledged the support for the project of One Voice Wales, which is the representative body for Town and Community Councils in Wales. The first letter plus the reminder letter are shown in Appendix A and Appendix E, respectively, and the questionnaire in Appendix C. A change for 2010 was that respondents could now also participate using an online questionnaire available through the WRO website. Online completion was the preferred option because it facilitated faster and less labour-intensive data input of questionnaire data to the 'Statistical Package for Social Science' [SPSS].

The first round of questionnaires was sent out in November 2010, with a reminder letter sent out in the following months. The questionnaire took approximately 30 minutes to complete.

One Voice Wales provided a list of 735 Town and Community Councils and associated clerks. A questionnaire was sent to all representative clerks, both urban and rural. How communities were identified as rural is described below. It was expected that the community clerks

would answer the majority of the questions as, although some do not reside in the community that they serve, their position in the council tends to lead them to possess a deep understanding of local issues and the locality. In addition some questions were answered through a process of collaboration with council members, so responses were the product of a number of people with knowledge of the community. This process could only strengthen the validity of these replies.

There were 450 returns in total, out of 735 communities in all of Wales, representing a response rate of 61%. Therefore, the first step in carrying out the analysis was to identify those rural Community Councils to be included in the study. Following discussion it was decided to employ the RDP 2007-2013 classification of rural. The net result of this process was a reduction in the number of communities with larger populations.

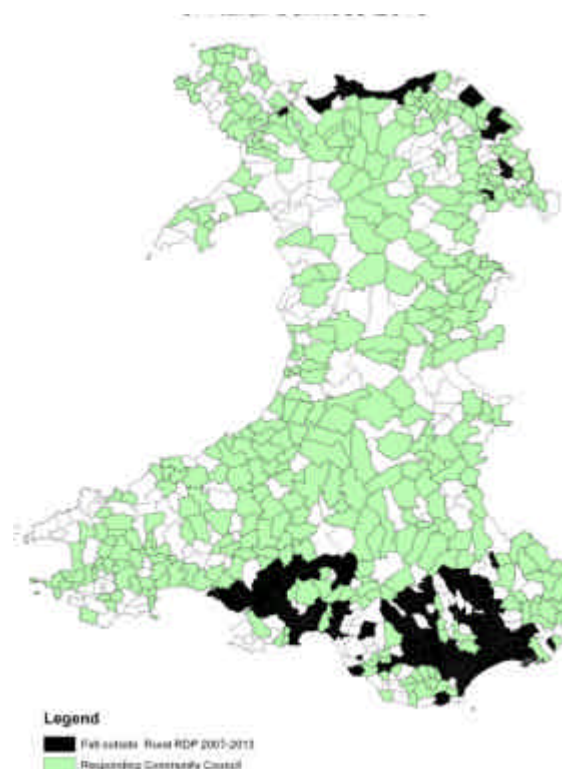
Using the RDP 2007-2013 classification of rural Wales, 83% of the communities were considered rural, out of which we received 370 responses (61%). Figure 1.1 shows the distribution of responses. From the map, we can see that there was a representative distribution of responses across rural Wales.

Structure of report

Following this introduction, there are a further ten sections to the report. Sections one to seven provide an analysis of the data from each of the main services contained in the survey (in order these sections encompass: shops, financial, food and drink services; medical services; education and day-care; places of worship, information and welfare; recreation facilities and community activities; transport; and community recycling). Section eight then provides further analysis of qualitative material before the penultimate section looks at longitudinal change between 2004 and 2010. Finally, section ten draws together

the previous sections of the report to discuss the findings and to make some concluding remarks.

Figure 1.1 Distribution of survey responses within Wales



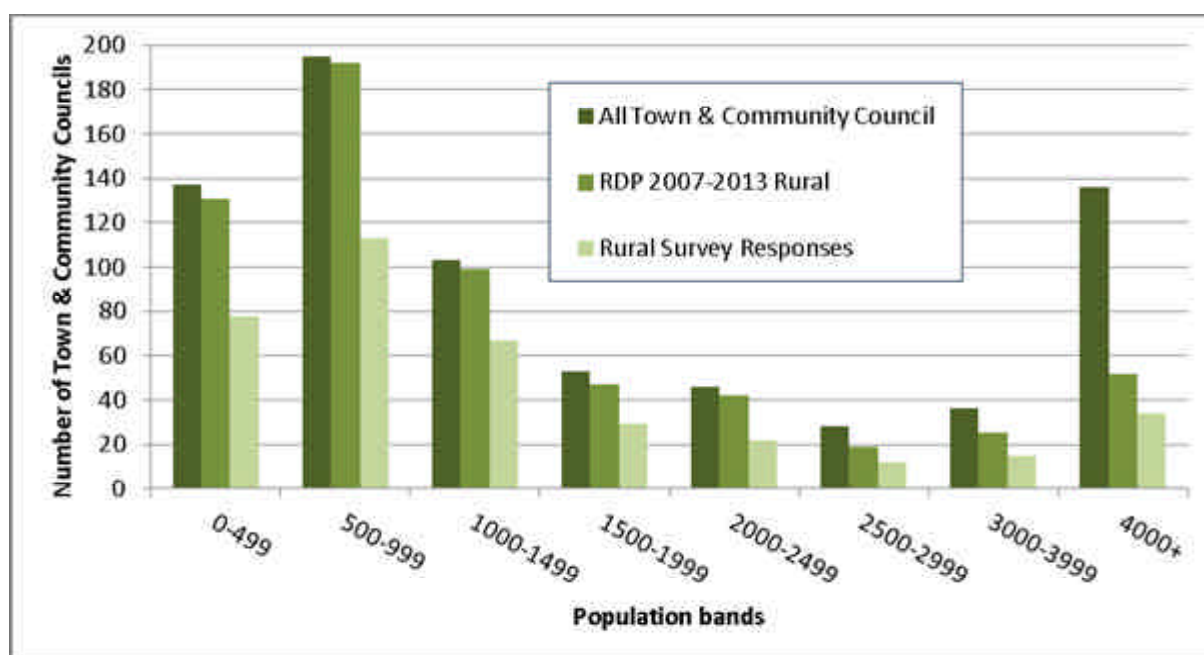
The findings from the survey are presented in each section using a series of tables and charts, illustrated by quotes from survey respondents. Responses were linked to the Wales Rural Observatory's GIS, which enables some of the results to be visually represented on a map and also facilitates future comparison with other data assembled by the WRO.

GIS methodology has made possible the analysis of service levels in terms of the population size of the communities, taken from the 2001 Census. The question of population distribution in the communities surveyed is an important one. Previous work conducted by the WRO found that particular services are more likely to be present in areas with higher population concentrations. Figure 1.2 displays the number of communities within particular

population bands in Wales and also in the surveyed communities. Clearly a large proportion of those communities surveyed have populations below 500 and between 500-1000 people. In these Community Council areas we might expect relatively low levels of service provision beyond the most basic service facilities (shop, pub, post office, primary school).

The population distribution in all surveyed communities is also shown in spatial terms in Appendix G. This clearly shows the high concentration of communities below 1000 population across rural mid and west Wales.

Figure 1.2 :Population of Town and Community Councils in Wales



SECTION 1

Shops, Financial, Food and Drink

1.1 Introduction

The analysis in this section breaks into population bands the survey data on services such as shops (food and non-food), banks and building societies, post offices, food establishments and public houses. The findings are presented as a series of tables.

1.2 Headline Statistics – Shops, General Stores and Supermarkets

The overall levels of provision of shops were as follows:

- **Shops selling food only:** 62% did **not** have this service facility in their community
- **Shops selling non-food only:** 74% did **not** have this service facility in their community
- **General stores:** 46% did **not** have this service facility in their community
- **Supermarket:** 90% did **not** have this service facility in their community

Just over half of rural communities were supplied by a general store. The majority of surveyed communities did not have a supermarket, which is probably a reflection on the size of customer base required to support this type of establishment. There were a large proportion of communities without a shop specifically for food or non-food items.

1.2.1 Population analysis - Shops, General Stores and Supermarkets

The following analysis unpacks the overall figures by analysing variation between communities with specific population levels. Tables 1.1 – 1.4 present this information.

Table 1.1 shows that in 2010 shops selling food tended to concentrate in councils with higher populations. At 38%, just over a third of communities had a food shop in the 1000-2000 population band, the proportion rose to 61% in the 2000-4000 and 94% in the 4000+ population band.

Shops selling non-food items also displayed a similar pattern as the service tended to concentrate in community councils in the higher population bands: with 29% in the 1000-2000 population band, 41% in the 2000-4000, and 79% in the 4000+ population band.

Table 1.1: Proportion of communities with a food only and non food shop

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more food shop	14	10	26	23	36	38	61	94	38
One or more non-food shop	11	10	11	3	16	29	41	79	26

A similar trend to the previous table (Table 1.1) was displayed in general stores (Table 1.2), with the larger communities more likely to have the service. The proportion of communities with this service decreased in a linear pattern below the 4,000 population band. As might be expected, general stores were the most

common form of shop located in most communities.

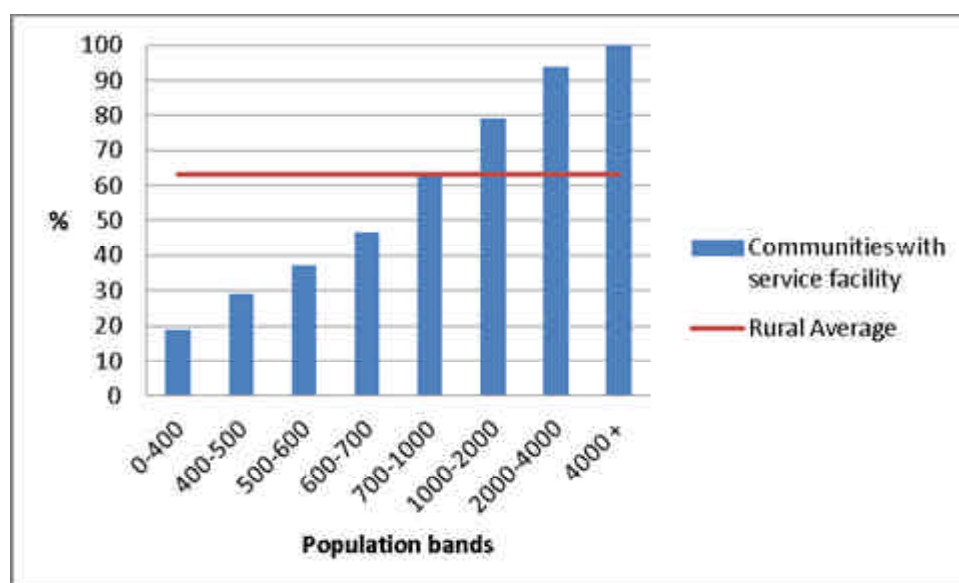
Table 1.2 also shows that few communities had supermarkets and these were most likely to be found in communities with over 4000 population. Provision in communities was much lower below this community population size.

Table 1.2: Proportion of communities with a General Store (selling food and non-food items)

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more general store	16	24	30	40	48	67	90	82	54
One or more supermarket	0	2	11	0	4	5	14	53	10

Figure 1.1 combines all descriptions of shop and presents the information visually for comparison using population bands. It can be seen that as community size increases the proportion of communities with a shop (of any type) also increases. Levels of shop provision reach above the rural average when community sizes are above 1000 people.

Figure 1.1 - Proportion of communities with a Shop (of any type)



1.2.2 Change in provision since 2007 – Retail

Community clerks were also asked how service levels had changed since 2007, enabling an assessment of short term fluctuation in provision. It is important to note throughout the report that some community clerks reported that their community had undergone no change between 2007 and 2010. However, this result could potentially equate to the community continuing with low or no level of service provision and it is therefore more useful to focus on increase and decrease to indicate an improvement or worsening of service levels.

In terms of retail, 55% of clerks considered that provision had remained the same. However, issues relating to reduced opening hours, relatively high prices and limited choice, were noted. The reliance on seasonal custom for some businesses was also implied by a respondent, who observed:

“But our main village store only opens for the summer season.”

Over a third of clerks (37%) suggested permanent shops had decreased in their community since 2007, while six per cent reported an increase.

However, the opening of certain shop types was not always perceived as beneficial to the community, as one clerk explained:

“Recently proposed supermarket in adjacent area may negatively affect town.”

This highlights that certain communities had service provision dependencies in neighbouring areas in addition to their own community.

1.3 Headline Statistics – Post Offices

While post offices are routinely perceived to be ‘the centre of a rural community’ and a key service in rural areas, the number of post offices in the UK has declined.

Recent developments in communications technology such as the widespread use of e-mail, the direct payment of state benefits, and the provision of online services for banking and other retail activities have resulted in a reduction of customers to the post office branch network. To address these issues the UK government implemented the Network Change Programme to modernise the Post Office network. Over an 18 month period commencing in October 2007, across the UK, approximately 2500 branches have been closed, with more than 500 of them replaced by outreach services.

The survey showed that many communities (43%) in rural Wales are now without a post office. Being without such a service can be problematic as noted by this respondent:

“The services provided by the Post Office and the local shop are vital. Life without these would be extremely difficult.”

Clearly provision is important. However, as indicated by Consumer Focus Wales, the facilities available and opening hours are also important factors. A number of communities commented on this subject,

“Post Office was closed under the Network Change Programme. The town now has a mobile outreach service on much reduced hours and days.”

“Mobile Post Office van is unreliable, public transport is limited.”

“Mobile post office not attending regularly and on time causes problems for local residents.”

“Mobile service for limited hours per week.”

“Only one hour per week service in pub or 5 miles.”

1.3.1 Population analysis – Post offices

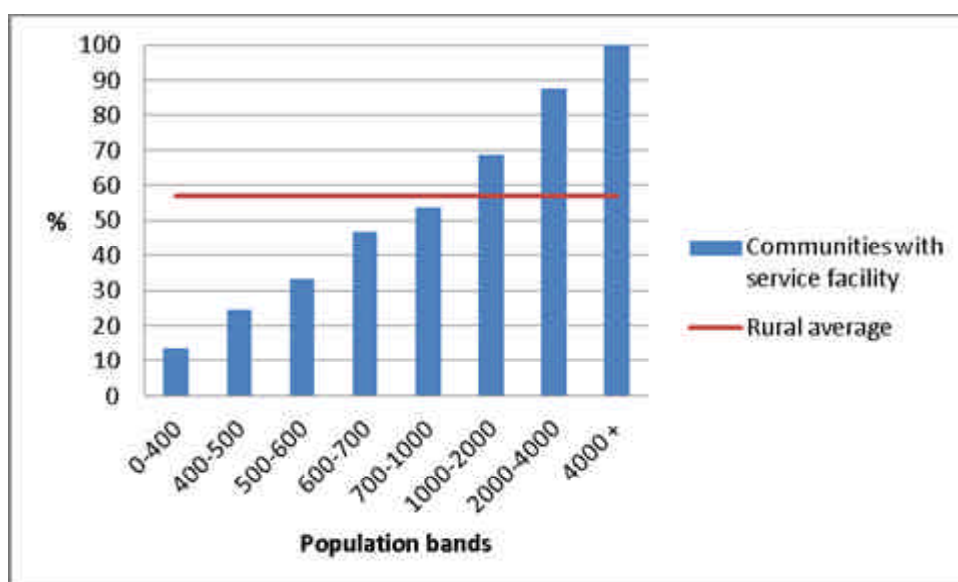
Table 1.3 and Figure 1.2 clearly show that as community population size increased so did the likelihood of post office

availability in rural Wales. Communities with populations above 1,000 were more likely to have a post office situated in their local area than communities with fewer people.

Table 1.3: Proportion of communities with a Post Office

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more post office	14	24	33	47	54	69	88	100	57

Figure 1.2 Proportion of communities with a Post Office



1.3.2 Change in provision since 2007 – Post offices

In terms of change, 31% observed that the number of post offices had decreased since 2007. In most communities (68%) the number of post offices remained unchanged. It is important to keep in mind that although the level of provision might remain the same, this did not necessarily mean that the range of facilities available within each post office was unchanged or that opening hours were unaffected, as this council clerk reported:

“Did close but has reopened in the shop but fewer services.”

Only one community in the survey reported an increase in post offices in their local area.

1.4 Headline Statistics – Eating Establishments

In terms of eating establishments:

- **Restaurants** (open all year) –63% did **not** have this service facility in their community (26% of restaurants were seasonal).
- **Café** (open all year) –67% did **not** have this service facility in their community (36% of cafés were seasonal)

- **Take-away** (open all year) – 71% did **not** have this service facility in their community (17% of takeaways were seasonal)

Overall, 37% of responding communities had a restaurant, 33% had a café, and 29% had a take-away (all open all year around). A number of cafés were seasonal (36%) and just over a quarter of restaurants were also seasonal. Take-aways were less common in rural communities and less likely to be seasonal.

1.4.1 Population analysis - Eating Establishments

Tables 1.4 – 1.6 show the proportion of community council areas with various types of eating establishments. Although restaurants were fairly well represented across all population bands in Welsh rural communities, other types of eating establishment tended to be concentrated in communities with over 2000 population. Cafés appeared to be the most common form of eating establishment in communities with populations below 400.

Table 1.4: Proportion of communities with a restaurant (open all year)

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more restaurant	19	27	33	27	27	41	51	71	37

Table 1.5: Proportion of communities with a Café (open all year)

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more café	22	15	11	13	27	35	53	79	33

Table 1.6: Proportion of communities with a take away facility (open all year)

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more take-away	8	7	15	10	9	30	69	74	29

1.5 Headline Statistics – Banks and Building Societies

An effect of the rationalization and centralization of financial services is that Banks and Building Societies have tended to disappear from rural villages. In addition, increases in internet banking and the 2008 financial crisis have the potential to reinforce this effect. Some banks such

as NatWest now provide mobile banking facilities for the more remote communities.

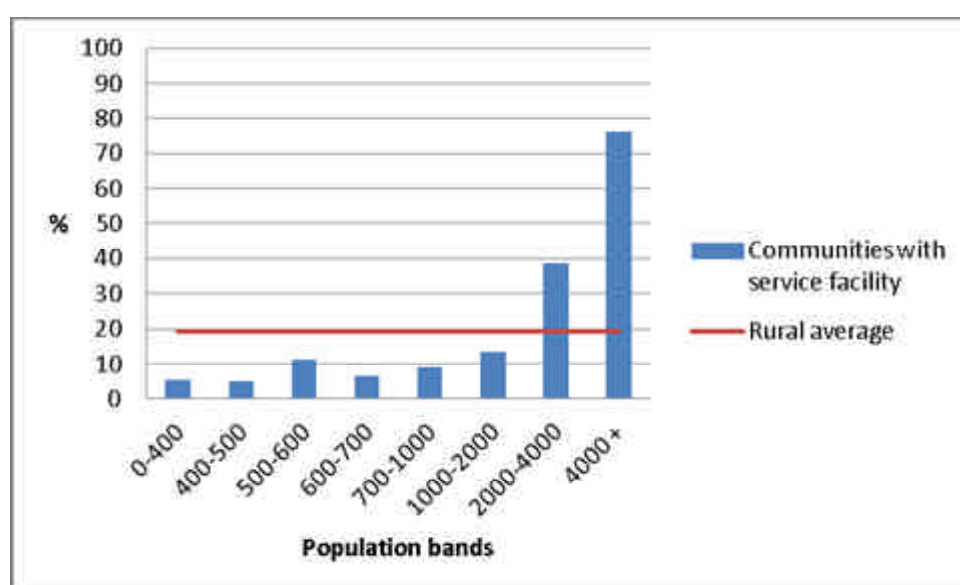
- **Bank** –86% did **not** have this service facility in their community
- **Building Society** –91% did **not** have this service facility in their community

Headline statistics show that significant proportions of the total communities in rural Wales were without a bank or building society.

1.5.1 Population analysis - Banks and Building Societies

Figure 1.3 clearly demonstrates the centralisation of banks and building societies, showing that only communities with a population size over 2,000 had above average provision for rural Wales.

Figure 1.3 - Proportion of communities with a bank or building society



1.5.2 Change in provision since 2007 – Banks and building societies

Over a quarter (26%) of community councils reported that the number of banks and building societies had decreased in their local area since 2007, while 69% of communities witnessed no change in provision. This might have represented a continuation of low service levels, as there were few communities that contained these services. Only two communities in the survey had had an increase in these facilities.

1.6 Headline Statistics – Public Houses

The importance of the public house as a key service in rural areas has been recognized by the implementation of the 'Pub is the Hub' project, which has been working in Wales since 2008. Some public houses also serve as a focal point for the community, hosting community events and, sometimes, other services such as the post office.

- **Public house** –18% did **not** have this service facility in their community area
- Over three quarters (77%) of public houses served meals.

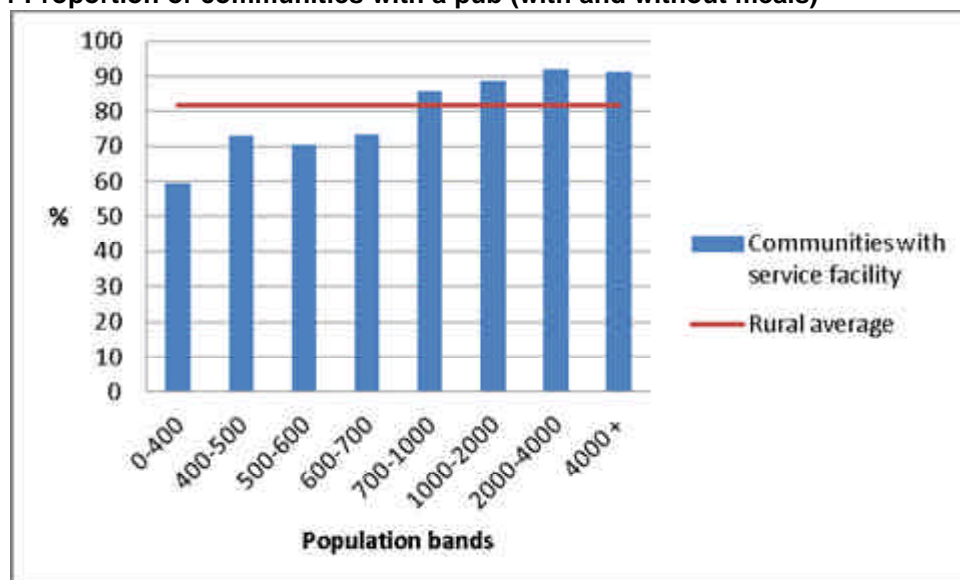
1.6.1 Population analysis - Public Houses

Pubs serving meals were fairly well represented across all population bands in Welsh rural communities (Table 1.7). However, these types of public houses tended to be concentrated in large communities (over 700, population). The trend was similar for pubs not serving meals - these were less abundant (Table 1.7). The overall distribution of pubs is shown in Figure 1.4.

Table 1.7: Proportion of communities with a pub (serving meal & not serving meals)

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more pub (meals)	57	68	67	67	82	84	84	91	77
One or more pub (no meals)	5	15	15	20	18	27	55	65	28

Figure 1.4 Proportion of communities with a pub (with and without meals)



1.7 Headline Statistics – Petrol Stations and Garages

In addition to their primary role of providing fuel for private or commercial transport, most petrol stations have shops selling convenience items, such as newspapers and confectionery. Indeed, many petrol stations sell a wider range of goods, including basic foods.

- **Petrol Station** –39% did **not** have this service facility in their community area
- **Garage (repair cars)** –over half (52%) did **not** have this service facility in their community area

1.7.1 Population analysis – Petrol station and Garages

The customer base of petrol stations tends not to be confined to the immediate vicinity. Many customers are longer distance travellers, passing through a locality. Consequently, it is generally more important to locate a petrol station on a main transport route or close to a larger population base rather than in a smaller rural settlement. This is reflected in Figure 1.5, which shows that the proportion of communities with a petrol station or garage increased with population size. A similar trend is shown for garages (that repair cars). However, there were, in general, slightly more communities with this service.

Figure 1.5 Proportion of communities with a Petrol Station

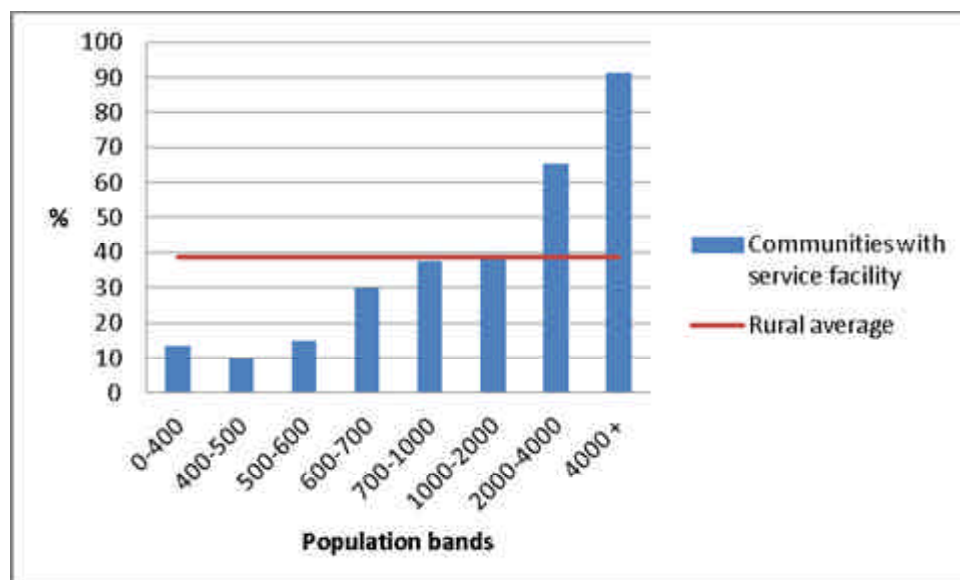
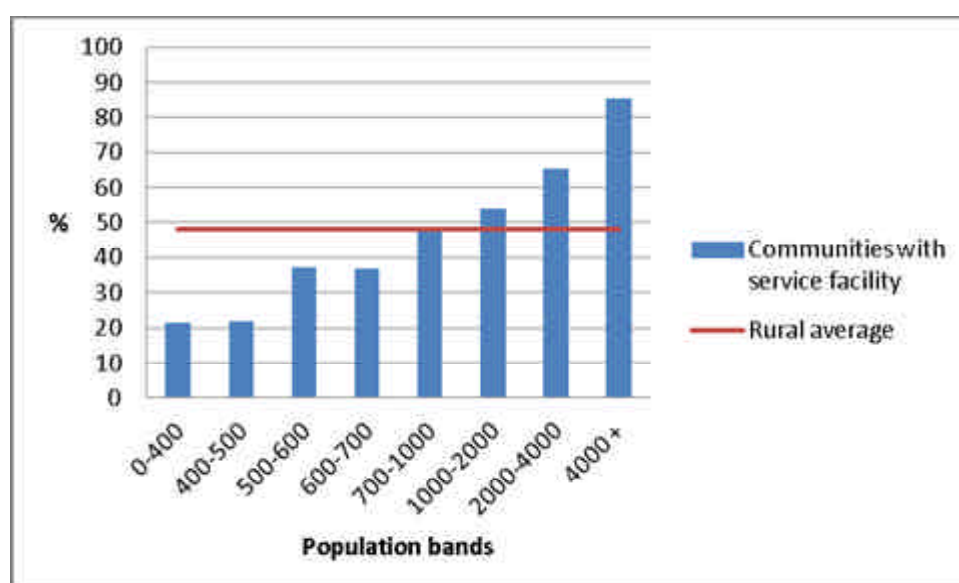


Figure 1.6 Proportion of communities with a Garage (that repairs cars)



1.8 Perceptions of General Retail Provision

The community clerk of each council was asked to assess general retail provision in their local area. At 46% the largest proportion rated retail provision as poor; 16% considered general retail provision to be good; and the remaining 38% of respondents rated it as adequate.

Each clerk was asked to provide further comments on retail provision. Problems declared included limited availability, or lack, of shops,

"All the shops in the area have closed."

"Only one shop, not much choice!"

"Need to fill the empty shops."

Other commentators highlighted the relatively high prices of commodities sold in local shops,

"Little choice therefore expensive."

"One only and more expensive than major supermarkets."

Many clerks acknowledged that retail services, if not available in their own community, were available in nearby towns. But this then involved travelling.

"Always need to travel."

"Rural folk have become accustomed to having to travel to the nearest town to buy goods."

"Adequate for local shopping but we have to go out of area for clothes, books, hobbies etc.."

"Community is within three miles of a full range of shops and services so a local shop is unlikely to be viable."

Certain communities have adapted to the problems facing rural retail services,

"A mobile grocer/baker weekly, a mobile fruit van – weekly."

"Friendly service, reasonable range of goods for local residents and visitors. Offer a local delivery service for elderly residents. Will accept orders for some items."

"Local shop run by volunteers, 7am-6pm otherwise no local shop would exist."

SECTION 2

Medical Services

Taking together the importance of medical services and the efficiency criterion of an adequate population base or catchment area, one might expect that these types of services would tend to be based in the main settlement areas of rural Wales. This section examines the levels of provision in rural Wales of GP surgeries, health centres, hospitals, dental surgeries and pharmacies.

2.1 Headline Statistics – Medical Services

- **GP** –70% did **not** have this service facility in their community
- **Dental practice (private)** –85% did **not** have this service facility in their community.
- **Dental practice (NHS)** - 86% did **not** have this service facility in their community
- **Pharmacy** - 72% did **not** have this service facility in their community
- **Health Centre** – 86% did **not** have this service facility in their community
- **Hospital** (of any type) – over 90% did **not** have this service facility in their community

- **Hospital (A&E/Acute)** – 77% did **not** have this service facility in their community or in an adjacent community or town council. The average distance for these communities to the service facility was 18.2 miles.
- **Community Hospital** – 72% did **not** have this service facility in their community or in an adjacent community or town council. The average distance for these communities to the service facility was 12.1 miles.

2.2 Population analysis – Medical Services

The concentration of medical services in communities with larger populations is displayed in Table 2.1. GPs, dentists, health centres and pharmacies all had below average provision in communities with less than 1000 people. Hospitals displayed a similar trend apart from in communities with between 500-600 people which showed above average provision.

Table 2.1: Proportion of communities with medical services

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
GP	3	7	11	7	11	33	61	97	30
Dentist	0	10	11	3	2	14	35	88	19
Health centre	0	5	7	0	9	11	20	62	14
Pharmacy	0	7	11	7	13	26	63	91	28
Hospital	8	5	22	3	7	5	20	65	14

2.3 Change in provision since 2007 – Medical Services

Overall medical service provision has remained stable with around 90% or over of communities having the same number of GPs, health centres, pharmacies, and hospitals as in 2007. Slightly more

change was noted in dental practices than other medical services and here only 78% (Private) and 68% (NHS) remained unchanged. Since 2007, 9% of respondents reported an increase in NHS dentist surgeries within their community and only 3% reported a decrease. More fluctuation was evident in private dentist

surgeries: 11% reported an increase in provision within their community with an equal amount reporting decrease.

2.4 Perceptions of Medical Services Provision

Just over half of respondents rated the provision of medical services as adequate - more rated them as good (28%) than poor (21%). Despite over half of respondents rating medical services as adequate, when asked for further comments a series of additional problems emerged. These related to opening hours and accessibility,

"A part time GP surgery is held for two hours on three days of the week. These are appointment only."

"Access is a problem, appointment system in GP surgery causes some problems."

"Poor bus service if travelling to surgery. No local taxi."

Certain accessibility problems were related to communities that bordered England:

"Hospital services are often only available from England."

"We live in Wales but our only GP is in England thus patients have to pay prescription charges."

The threat of service closure was a concern for some communities:

"A&E provision used to be at adjacent council area now seven miles away and concern about threat to Community Hospital as nearest General is 40 miles away."

"Community objecting to a pharmacy application as it will result in the closure of pharmacy supplied by community health centre."

The long distances needed to travel to obtain the correct treatment were emphasised by this community clerk:

"... If you need hospital treatment you have to travel 55 miles to Shrewsbury. Recently a person travelled to Bronglais, Aberystwyth and ended up in Moriston, South Wales, for a minor operation. His wife had to drive and collect him, nearly 150 mile round trip. We also need to have our own local hospital provide more beds for recuperation of patients. It is very, very poor! This situation, we are told is going to get worse, are we in a third world country?"

Respondents also explained that accessibility was even more difficult for certain social groups:

"Hard for: 1)The old. 2) People with no cars. 3)The very sick, to get to the town five miles away."

"Services seem to be moving further away from town which has quite a high elderly population."

"Private Dentists very expensive."

Despite not being specifically explored within the survey, the Ambulance service arose as a problematic service in rural Wales:

"Ambulance response times are notoriously bad, and have been subject to continued protest."

"Good doctors, but a VERY POOR ambulance service."

There was some evidence of initiatives to counteract some of the difficulties faced by communities:

"Local pharmacy also runs prescription box into village once a week for those who cannot get to surgery."

"Currently less than adequate, but new major hospital coming on line later this year in adjacent council area will improve access considerably."

SECTION 3

Education and Day-care

3.1 Headline Statistics – Groups for children

In the economic environment of the wider UK the provision of childcare services is seen to be important in that it enables access to paid work for members of the family unit.

- **Nursery** –73% did **not** have this service facility in their community
- **Parent and toddler / Playgroups** –39% did **not** have this service facility in their community
- **Out of school groups** -53% did **not** have this service facility in their community

Almost three quarters of communities were without a nursery (73%). However, more communities had playgroups and out-of-school groups.

3.1.1 Population analysis – Groups for children

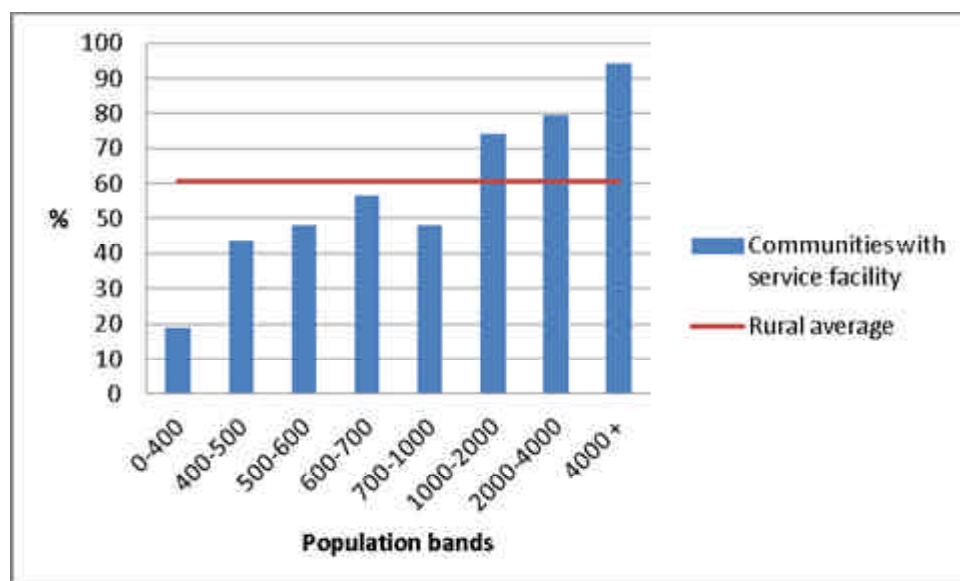
Table 3.1 displays the proportion of communities with nurseries (private or public). The majority of communities in rural Wales below the 4000 population threshold had no nursery provision, which could have social (and economic) implications for the families in such locations.

Table 3.1: Proportion of communities with a publicly / privately funded nursery

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more public nursery	3	7	30	23	23	33	37	53	27
One or more private nursery	5	7	26	17	9	27	45	82	26

The low levels of nurseries were off-set somewhat by relatively high levels of playgroup provision in the responding communities (Figure 3.1). On average, more than two out of every five communities had this service in the population bands above 400 people.

Figure 3.1: Proportion of communities with a parent and toddler group / playgroup



Over 24% of all rural communities had out-of-school clubs (Table 3.2), with greater representation in communities with between 500-600 people.

These facilities were more likely to be available when community population size exceeded 1000 people.

Table 3.2: Proportion of communities with out-of-school child-care facility

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more Out of school facility	24	29	59	30	43	56	57	68	47

3.1.2 Change in provision since 2007 – Groups for children

In terms of nurseries, since 2007 the majority of respondents (65%) stated there had been no change in the number of public funded facilities but more change had occurred in private nurseries (as 56% indicated no change). In both cases approximately a quarter (26%) of respondents did not know if there had been a change.

Almost three quarters of respondents reported that playgroup provision had remained the same. Fewer respondents stated that out of school groups had remained unchanged (64%); nevertheless, this still constituted the majority of cases. More communities reported an increase in groups for children than reported decrease but this proportion still constituted the minority of cases with most respondents reporting no change or not knowing how to respond.

3.2 Headline Statistics – Schools

As other WRO work such as the ‘Deep Rural Localities’ report has revealed, the school is seen by many rural residents as a key institution in rural communities. It is argued that the loss of a school can lead to excessive travelling and over-long days for children who have to travel to more distant schools, together with transport issues for their families. In terms of the sustainability of rural communities the school is seen as a focal point for the community and as an attractor for potential in-movers.

- **School (5-11 age group)** –25% did **not** have this service facility in their community
- **School (12-16 age group)** –85% did **not** have this service facility in their community

- **School (17-18 age group)** –86% did **not** have this service facility in their community

Primary schools were commonly found in most Welsh rural communities, with three in every four reporting that they had at least one. Education facilities for the higher age groups were found only in the minority of communities.

3.2.1 Population analysis – Schools

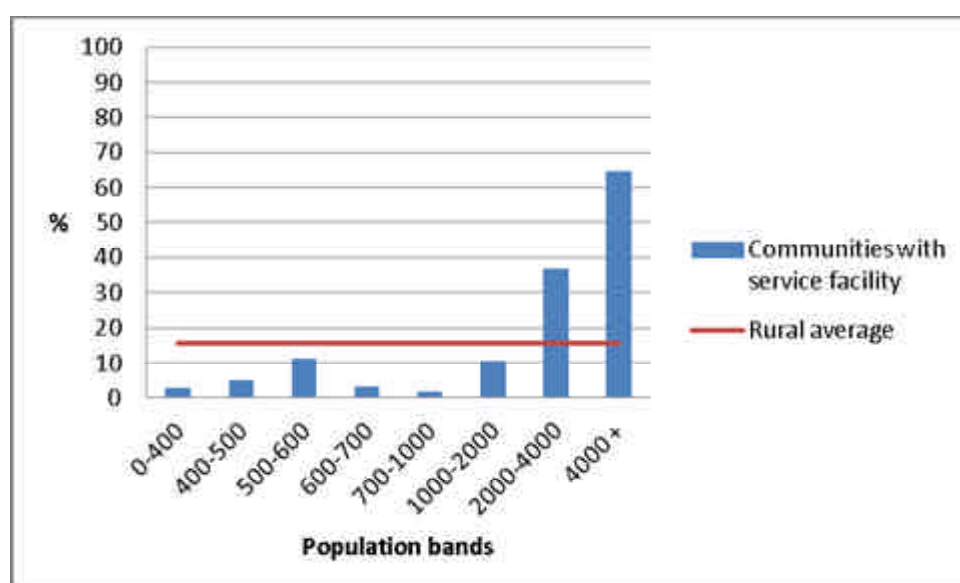
The majority of communities were well served by schools catering for the 5-11 age group (Table 3.3) with 51% and more having this service in population bands above 400 people. This proportion then increased with population size.

Table 3.3: Proportion of communities with a School for the 5-11 Age group

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
School (ages 5-11)	30	51	63	70	70	90	96	100	75

The proportion of communities with schools for the 12-18 age group was a function of population size, as one might expect, with the communities in the top population bands having the highest levels of provision – 65% in the 4000+ band (Figure 3.2).

Figure 3.2: Proportion of communities with a School for the 12-18 age group



3.2.2 Change in provision since 2007 – Schools

The questionnaire also asked how the number of schools had changed in the community. Few respondents reported an increase in the quantity of schools in their community since 2007. In each school age group 88% of respondents, or more, reported that the number of schools had remained the same in their community. At 8%, the 5-11 age group, was the only school type reported to have decreased by more than 2%.

3.3 Perceptions of Education Provision

There was a notably positive response to the question, ‘how do you rate the level of education provision in your community?’ with only 4% suggesting it was bad. Almost a third (31%) of respondents perceived levels to be adequate and over twice this amount (65%) rated the level of provision as good.

A number of respondents from smaller communities pointed out that nearby schools were used as there was no service in their own community:

“Nothing in local area since 1963. From 1963 to 2003 there was primary provision about 2 miles away- now an Area School 4 miles away.”

In other cases school reorganization and closure, or the threat of these was a problem:

“We have just lost a primary school needlessly.”

“Local schools under threat (a lot of anxiety in the community).”

“The local schools had been under threat and there were strong protests. Very happy with the current provisions and to keep things as they are.”

It was suggested by one respondent that closure would ‘...further weaken the rural community...’ another suggested it would be “...disastrous for this area.” The possible consequences of closure were highlighted:

“One school in the area, and that one is overflowing.”

“It is a very, very long day for the children with a long bus journey to add to the school day.”

Concerns were also raised relating to the language medium of the school:

“English medium provision is good; however Welsh medium for 12-18 is inadequate with children having to travel upwards of one hour to Pontypool each way.”

Many respondents praised the school facilities available within their area:

“Excellent schools and playgroups.”

“Fortunate to have outstanding schools, both primary and comprehensive.”

One respondent suggested adult education within the area was poor.

3.4 Headline Statistics – Day-care

- **Groups for people with disabilities** –90% did **not** have this service facility in their community
- **Groups for the elderly** –80% did **not** have this service facility in their community

3.4.1 Population analysis – Day-care

The provision of day-care groups for the elderly and the disabled again correlated with the size of the community, with the most significant levels of provision in the 2000-4000 and 4000+ population bands (Figures 3.3 and 3.4). Respondents indicated that in some cases groups no longer existed due to cuts in funding or inadequate facilities.

Figure 3.3: Proportion of communities with a group for the elderly

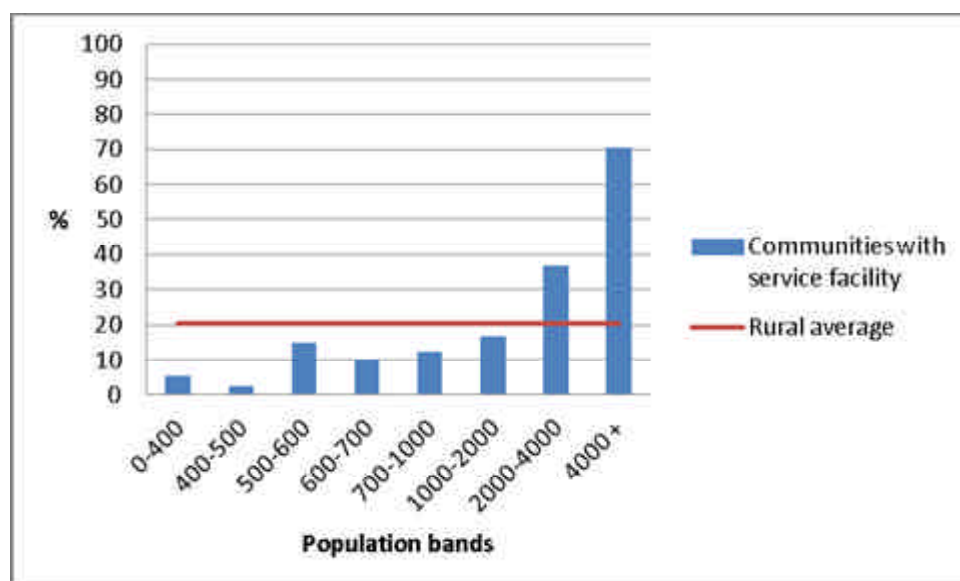
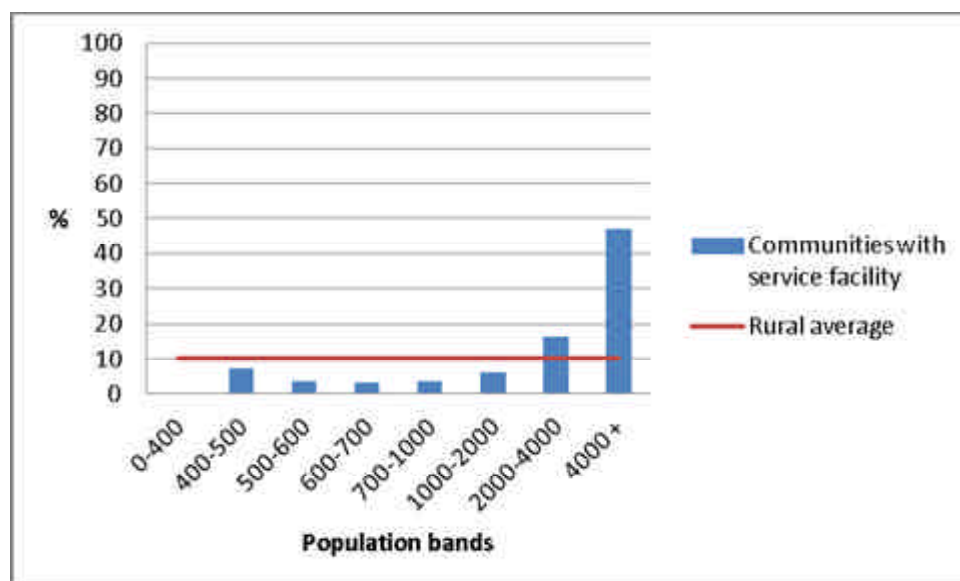


Figure 3.4: Proportion of communities with a group for people with disabilities



3.4.2 Change in provision since 2007 – Day-care

In terms of change to day-care facilities, 4% of respondents indicated that groups for the elderly had decreased, since 2007. Slightly more (7%) had witnessed a decrease in groups for people with disabilities. Only one respondent reported an increase in these facilities. The majority stated that provision of groups had stayed the same for the elderly (70%) and for people with disabilities (60%). A significant proportion of clerks indicated that they did not know if groups for people with disabilities or the elderly had changed during the period.

Since day-care in these areas is often inadequate or ‘*not provided in a formal sense*’ there are implications for the increased role of informal care in rural areas. It was also suggested that day-care groups have a socially inclusive function:

“Do have a social services supported group for the elderly (mainly) which meets weekly for social contact and meals - not during holiday periods.”

3.4.3 Perceptions of Day-care

Day-care facilities did not rate highly with respondents, with 40% rating them as bad. Only 15% rated the service facility as good and the remainder (45%) considered day-care provision to be adequate.

SECTION 4 Places of Worship, Information and Welfare

This section discusses the provision of welfare in terms of places of worship, information facilities, libraries and access to the internet and broadband.

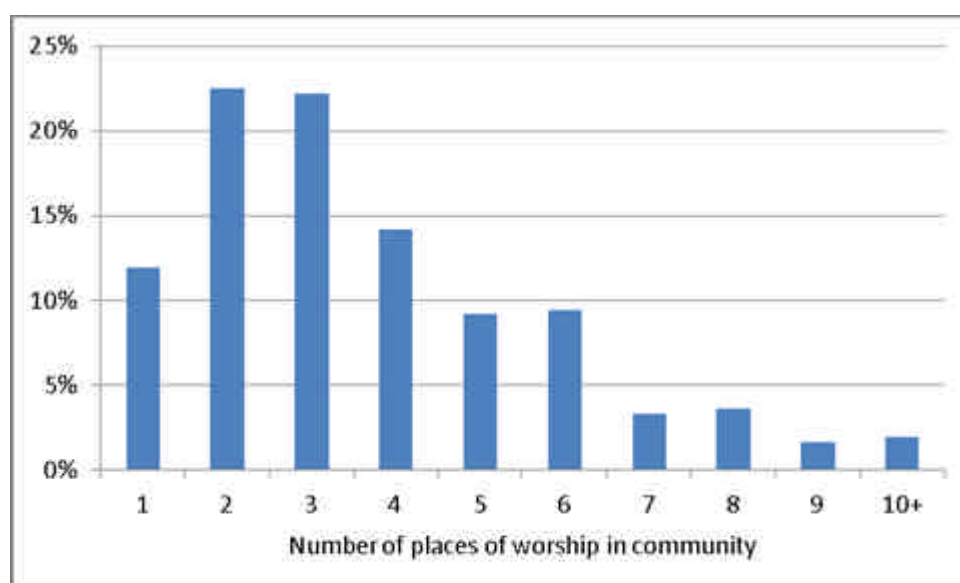
4.1 Headline Statistics – Places of worship

- **Places of worship** –Almost all communities contained a place of worship (97%)
- A quarter of respondents had a place of worship that was used for art/music; 23% were used for public meetings; 14% for school assemblies; and 38% had no other use.

- Other uses included coffee shop, flower festival, community lunches, mother and toddler groups, polling stations, social evenings, school shows and concerts and youth groups.

Clearly places of worship were common in rural communities; over a fifth of communities had two places of worship. Indeed, it was more likely for a community to have between two, three or four places of worship than to have one. In addition to being a place of worship, between 14% and 25% of communities used these facilities for art/music, public meetings and school assemblies.

Figure 4.1 Number of places of worship in each rural community



Most (80%) respondents reported that the number of places of worship in the community had stayed the same since 2007 whereas 17% reported that levels of provision had decreased.

4.2. Headline Statistics – Libraries and information services

- **Permanent Libraries** –78% did **not** have this service facility in their community
- **Mobile Libraries** –36% did **not** have this service facility
- **Public/Council Notice board** – 15% did **not** have this service facility
- **Community Newsletter** - 35% did **not** have this service facility in their community
- **Community Internet facility** – 68% did **not** have this service facility. Examples of where these facilities could be located include permanent libraries, community centres, village halls, hotels, pubs,

post offices and shops; however, this was reliant on communities initially containing these facilities.

- **Broadband** was reported to be available in the community by 85% of respondents.

Figure 4.2 and 4.3 display data on the proportion of communities with a permanent library and mobile library. Clearly, permanent libraries were concentrated in the communities with higher populations. Mobile libraries were found in the majority of all communities, including those that were more sparsely populated.

Most communities were well served in terms of notice-boards or newsletters.

Provision of community internet facilities was low in the smaller communities. Figure 4.4 illustrates this in terms of population size.

Figure 4.2: Proportion of communities with a permanent library

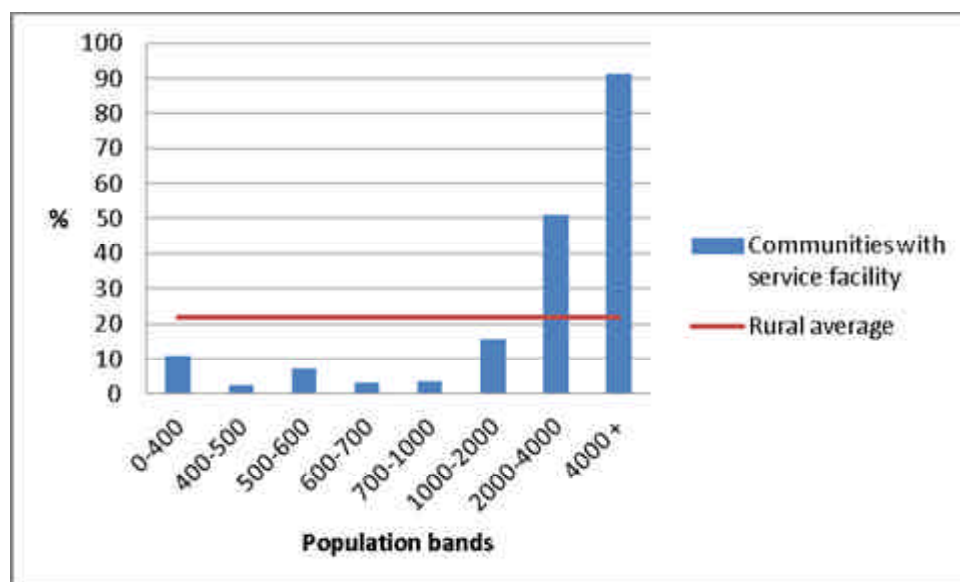


Figure 4.3: Proportion of communities with a mobile library

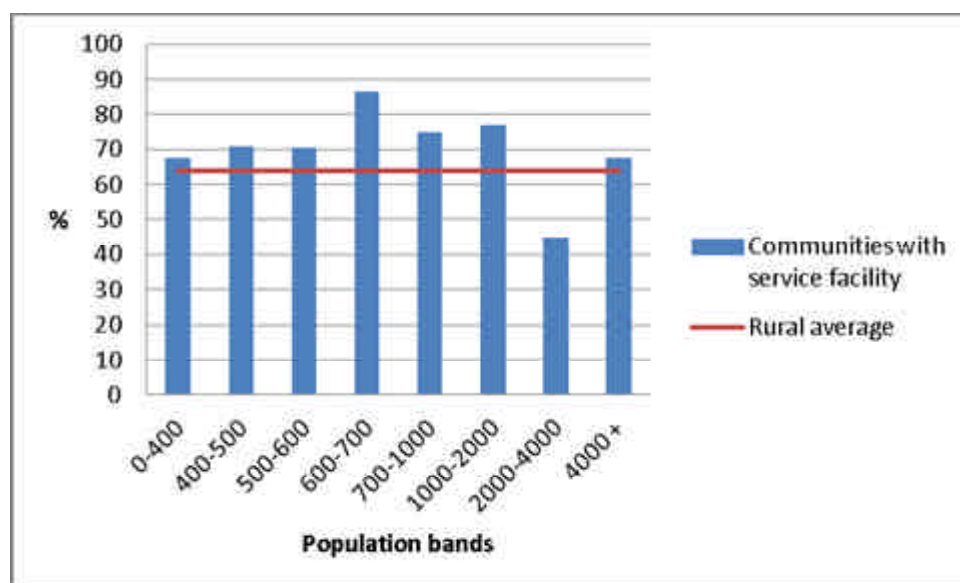
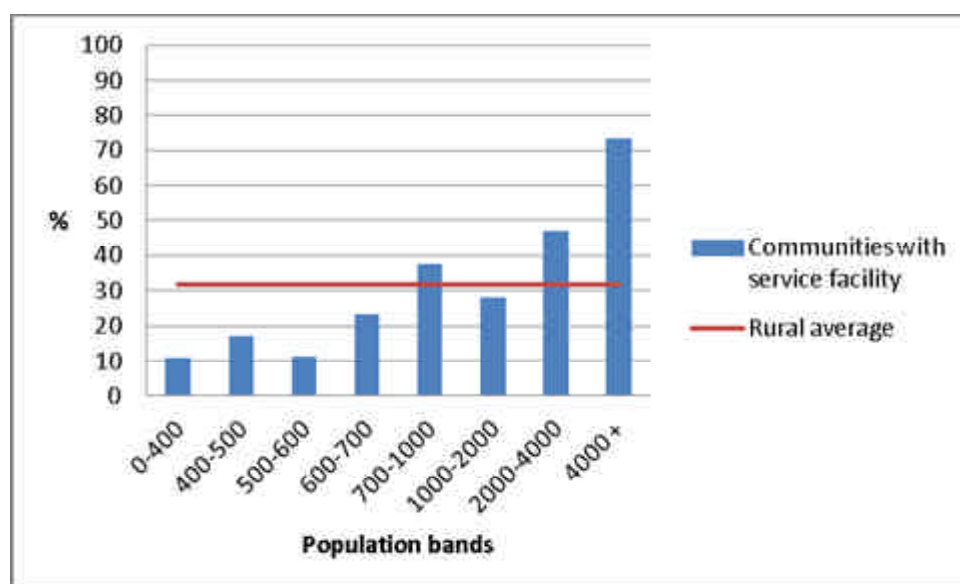


Figure 4.4: Proportion of communities with a community internet facility



Broadband was available in most communities, although there were issues concerning the quality of service provided. Many respondents claimed that the service that was provided was poor with slow transfer speeds, and an erratic and patchy service. Respondents noted that access to the service was not always evenly distributed throughout the community.

4.3 Headline Statistics – Crime prevention advice and measures

- **Crime prevention advice** – 30% did **not** have this service facility in their community
- The most common way of obtaining community crime prevention advice was through face-to-face contact with community officers or through neighbourhood watch (47%).

Organised meetings (22%) were also a popular method. The use of leaflets (16%) and the internet (12%) were less common methods.

- Under a quarter (23%) of those surveyed had introduced **crime**

prevention measures in their community.

Figure 4.5 Proportion of communities providing crime prevention advice

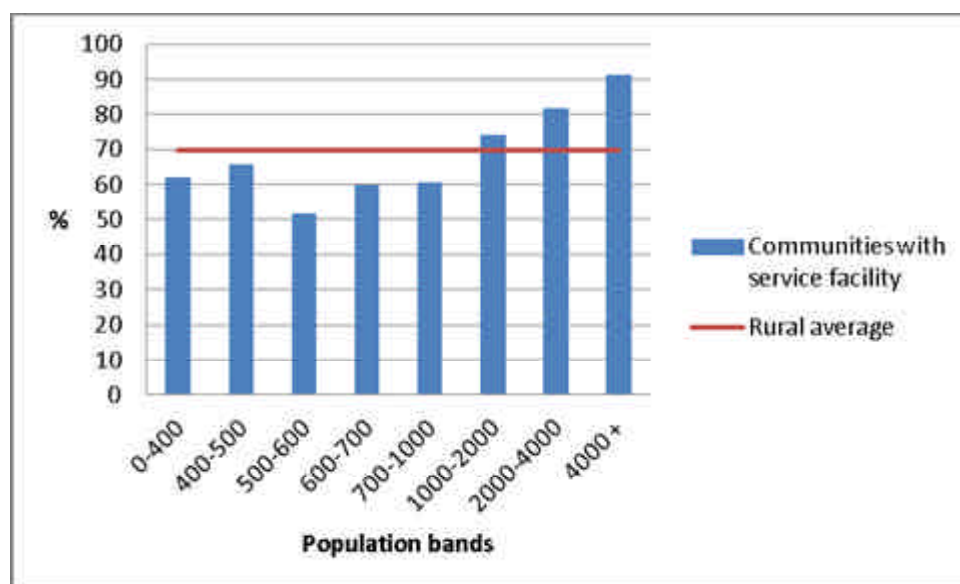
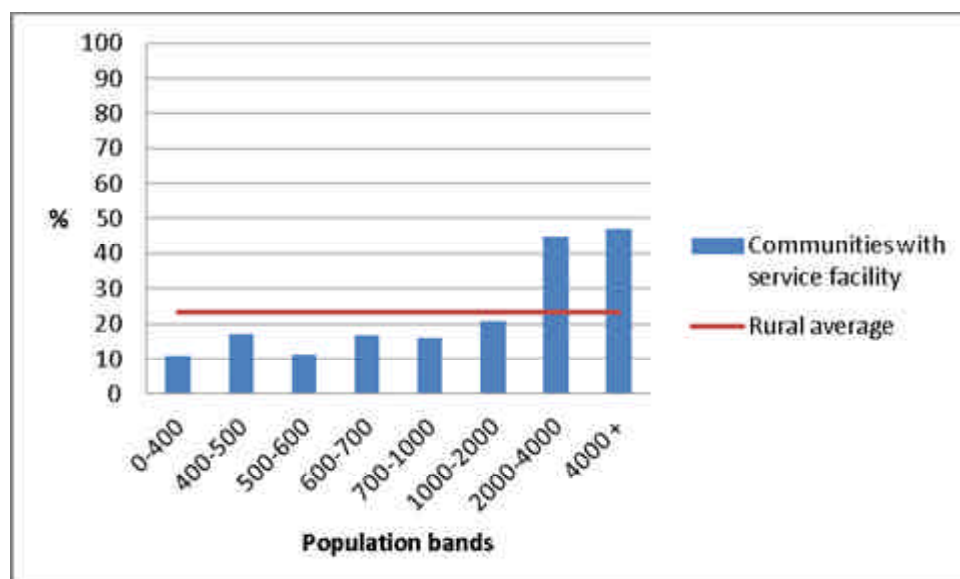


Figure 4.5 displays those communities with access to crime prevention advice. It shows that a high proportion of rural communities had such services. In communities containing less than 1000 people, between 52% and 66% had these

services. Fewer communities had introduced crime prevention measures (such as CCTV or village wardens) than provided crime advice. Those that had tended to be in the larger population bands (Figure 4.6).

Figure 4.6 Proportion of communities introducing crime prevention measures

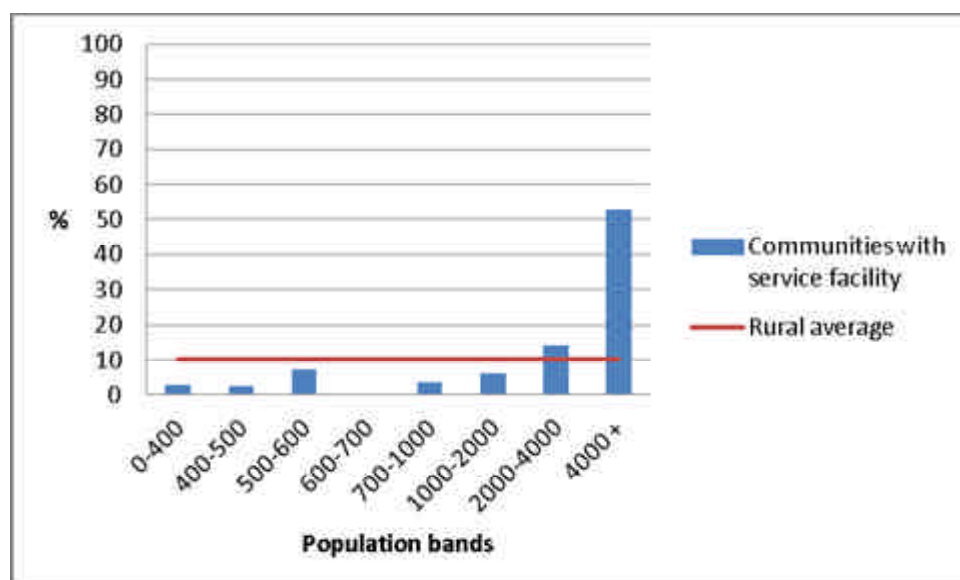


4.4 Headline Statistics- Advice services

- **Community legal service** – 95% did **not** have this service facility in their community
- **Counselling Service** – 95% did **not** have this service facility in their community
- **Citizen's Advice Bureau** – 91% did **not** have this service facility in their community
- **Job Centre** - 93% did **not** have this service facility in their community

Formal advice services were scarce in rural communities. In all cases the proportion of communities with these services was very much dependent on population size, with only the most populated communities having significant levels of such services (Figure 4.7).

Figure 4.7 Proportion of communities with any type of formal advice service



4.5 Headline Statistics – Support services

Support services for:

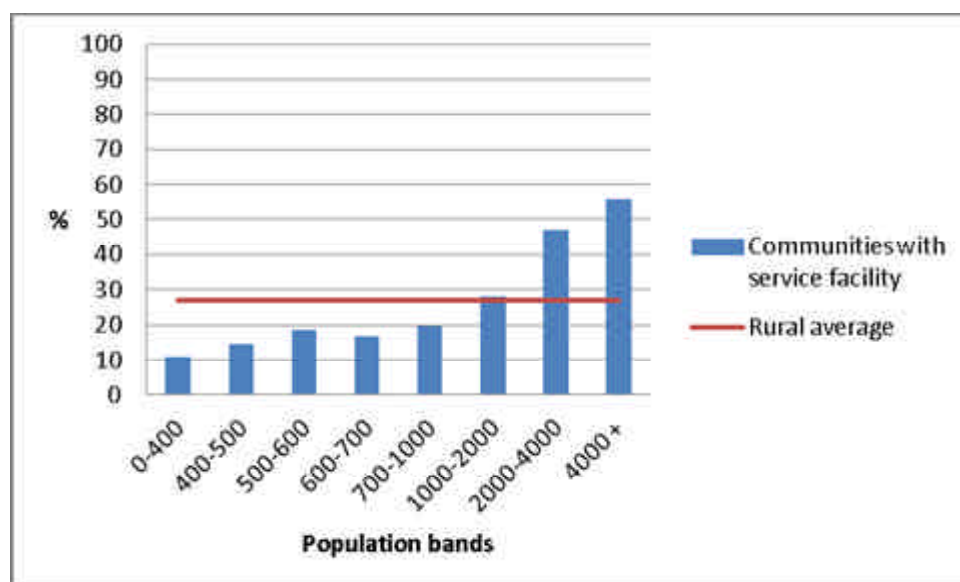
- **Elderly** – 80% did **not** have this service facility in their community
- **Young** – 79% did **not** have this service facility in their community
- **Disabled** – 92% did **not** have this service facility in their community
- **Unemployed** – 95% did **not** have this service facility in their community
- **Homeless** – 96% did **not** have this service facility in their community (93% in 2004)
- **People with drug / alcohol problems** - 95% did **not** have this service facility in their community
- **Those experiencing domestic violence** – 96% did **not** have this service facility in their community.

Levels of provision of sources of support for particular vulnerable groups in the local community were explored by the survey, including support groups for the elderly, young people, the disabled, the unemployed, the homeless, those with drug problems, and those who had been subject to domestic violence.

Support services for the elderly and young were the most common. Approximately a fifth of communities had access to these services. Other support services (for the disabled, the unemployed, the homeless,

those with drug problems, and those who had been subject to domestic violence) tended to be concentrated in those community councils with larger populations (4000+). Overall, less than 10% of all responding communities had support services for these vulnerable groups. Figure 4.8 displays the combination of all support services available to each community. The proportion of communities with these support services was low generally, particularly when the community contained less than 1,000 people.

Figure 4.8 Proportion of communities with a support service



4.6 Perceptions of Welfare

Data on various types of support and advice service are presented in sections 4.4 and 4.5. In all cases the proportion of communities with these services was very much dependent on population size with only the most populated communities having significant levels of such services

The qualitative data supports the quantitative material. For example, some of the least populated communities noted that there was:

"No level of welfare in our area."

And that there was:

"A rising age profile in local areas with no additional resources to support the additional demands."

One respondent stated that:

"an elderly person without a carer and/or transport is facing real problems in this part of rural Wales."

Some respondents, however, pointed to the fact that information, advice and support could be sought via Citizens' Advice Bureaux (CAB), Job Centres and

legal services in the surrounding towns. The problem associated with this was highlighted in one community:

"Anyone who drives and is mobile the facilities are within easy distance-for those relying on Public Transport the journey and availability is poor."

Additional transport related problems and lack of services were further detailed by the following respondent:

"...takes time and two bus changes and costs fares. During the snow and ice one person could not get his benefit - no support for homeless who have to sleep on the floor in friends places. No support for people on drugs."

The necessity for informal forms of welfare support was noted in some communities:

"Not good at all but the community tends to help people out as much as possible."

"There is none....we look after our old/infirm with voluntary/neighbour support."

As highlighted in 2004, there was the potential to operate mobile and drop-in services in more isolated communities and to utilise existing infrastructure in these communities, such as a village hall. However, there appeared to be little evidence of improvement in the situation since the publication of the 2004 report. This was reflected in how respondents rated welfare in their community, with 40% rating the service as poor. A further 53% perceived the service to be adequate and only 7% rated the level of welfare as good.

SECTION 5 Recreation Facilities and Community Activities

This section discusses the provision of services such as recreation facilities and community activities.

5.1 Headline Statistics – Meeting places

- **Village Hall** – 31% did **not** have this service facility in their community
- **Church/Chapel Hall** – 39% did **not** have this service facility in their community
- **Community Centre** – 67% did **not** have this service facility in their community
- **School Hall** – 60% did **not** have this service facility in their community

Table 5.1 displays the proportions of communities with meeting places of various types. Village halls and church/chapel halls existed in large proportions of communities, with slightly less evidence of provision of school halls and community centres in the councils with populations below 1000.

Less than half (45%) of the community areas containing schools also had a school hall.

Two thirds of community areas containing a place of worship also had a church/chapel hall.

Table 5.1: Proportion of communities with a meeting place

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more Village Hall	68	61	67	60	75	82	63	56	69
One or more Church/Chapel Hall	38	56	56	60	61	59	76	82	61
One or more Community Centre	14	12	19	30	27	35	51	74	33
One or more School Hall	16	22	41	27	38	45	59	68	41

5.2 Headline Statistics – Recreation facilities

- **Formal play area** – 26% did **not** have this service facility in their community
- **Swimming pool** – 87% did **not** have this service facility in their community
- **Sports Hall** – 81% did **not** have this service facility in their community

- **Playing field** – 31% did **not** have this service facility in their community

As Table 5.2 shows, the proportion of communities with formal play areas with equipment was relatively high with almost three quarters having this facility, and, more generally speaking, provision remained good across rural Wales with only the 0-400 population band dropping below 50% on this service. Other sports facilities were more closely linked with community size, playing fields being the

only facility where there was a significant level of provision in the population bands

below 1000 people.

Table 5.2: Proportion of communities with recreational facilities

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
One or more play area	38	51	70	50	75	88	92	94	74
One or more swimming pool	0	5	15	3	4	7	22	59	13
One or more sports hall	0	10	11	3	9	17	39	65	19
One or more playing field	24	39	67	53	68	88	92	91	69

5.3 Perceptions of Recreation activities

Less than half of respondents (44%) rated the level of recreational facilities as adequate and more suggested levels were bad (38%) than good (18%). Again, the qualitative data highlights some interesting points beyond the basic figures. Some respondents, for example, pointed to problems in trying to provide sports facilities. One perceived recreational facilities as poor but stated:

“as a council we are trying to rectify this but funding is the biggest stumbling block.”

Another suggested that they ‘*can’t get land*’ for community facilities and so contributed to a facility in a neighbouring community.

Respondents also highlighted that facilities needed to be refurbished and brought in line with community needs

“The children’s playgrounds are in need of refurbishment - they look very sad, tired and dilapidated.”

“There was a playing field but it is no longer used.”

“No designated play area for older children. Very little for adults.”

“Poor for children lack of play areas and sports fields.”

Whilst the majority of comments stressed the lack, or poor quality, of sports facilities in their community, some referred to the positive activities of volunteers,

“We are self reliant - facilities/businesses that exist are provided by the voluntary effort of local volunteers.”

This would suggest that levels of provision of various sports facilities were not only related to the size of the community – in terms of what they can physically and financially provide – but also dependent on the charitable nature of individuals.

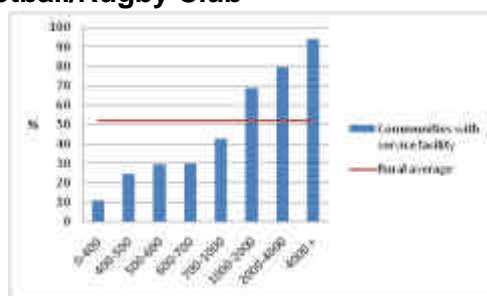
5.3 Headline Statistics – Community activities

- 52% had a **football/rugby club**, similarly 52% had **pub games**, 47% held **arts or music events**, a quarter had **Eisteddfodau**, 42% held **agricultural or horticultural shows**.
- **Other examples of community activities** included: carnivals, village fetes, sports clubs (e.g. snooker, cricket, darts, golf, tennis) dog/sheep trials and sailing.
- 12% of respondents indicated that they did **not** have any of the above activities in their community.

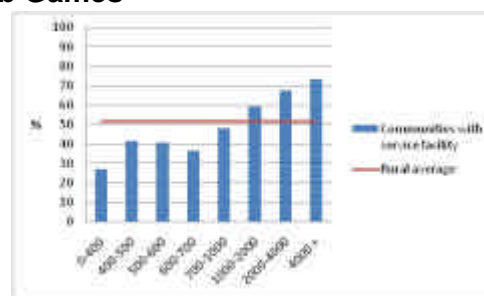
Most rural communities tended to have at least one form of community activity, which ranged in popularity. Figure 5.1 displays the proportion of different types of community activities available as described by each respondent. Communities with less than 1,000 people tended to have less community activities and were more likely to have none. Events such as Eisteddfodau and agricultural / horticultural shows were less reliant on the population size of the community.

Figure 5.1 Proportion of communities with community activities*

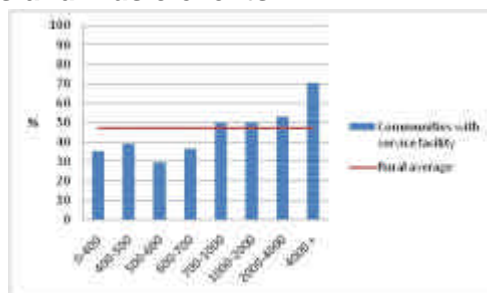
Football/Rugby Club



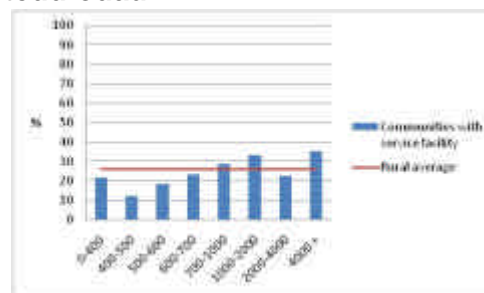
Pub Games



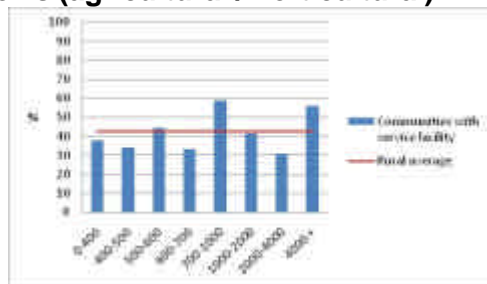
Arts and music events



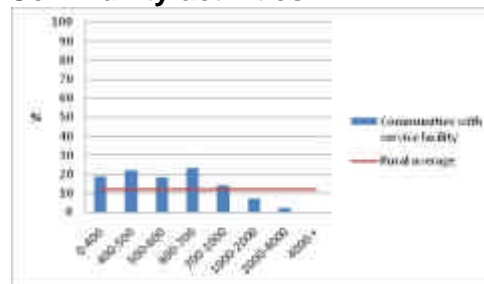
Eisteddfodau



Shows (agricultural / horticultural)



No Community activities



(* Horizontal axis in each case represents population bands)

5.4 Headline Statistics – Youth Groups

- **Beaver/Cubs/Explorer Scouts/Network** – 74% did **not** have this service facility in their community
- **Rainbows/Brownies/Guides/Rangers** - 70% did **not** have this service facility in their community
- **Youth social clubs** - 63% did **not** have this service facility in their community
- **Urdd** - 70% did **not** have this service facility in their community
- **Young Farmers Club** - 61% did **not** have this service facility in their community

Between 26% and 39% of communities had at least one youth group and Table 5.3 shows the proportion of communities with the varying types of youth groups or clubs. Provision of scouts or guide groups showed a relationship with population size, while groups like Urdd or the Young Farmers were more equally distributed in the communities with lower populations.

Table 5.3: Proportion of communities with various youth groups and clubs

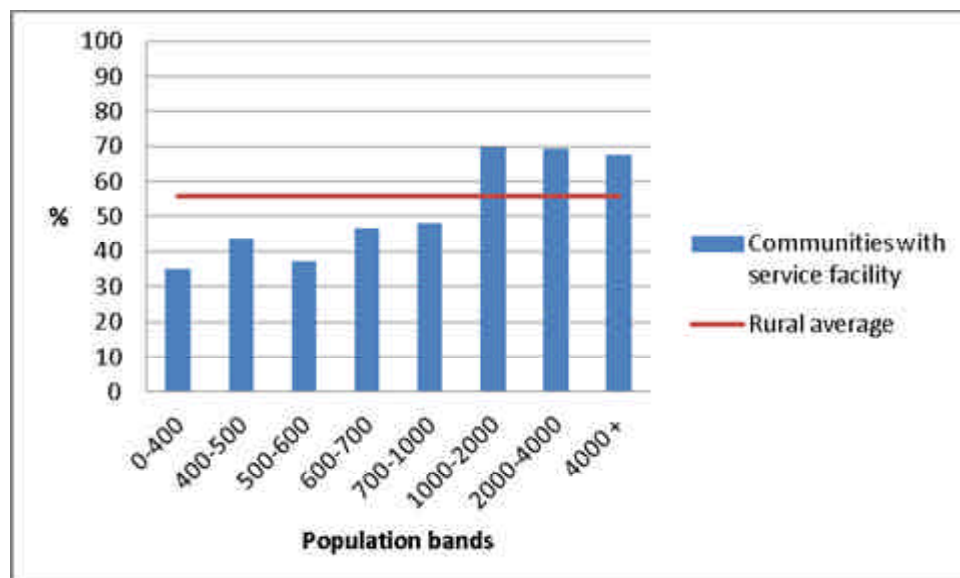
Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
Beaver/Cubs/Explorer Scouts/Network	5	10	7	3	16	27	51	79	26
Rainbows/Brownies/Guides/Rangers	5	15	19	7	18	33	53	76	29
Youth social clubs	11	24	19	13	23	45	61	76	36
Urdd	5	20	15	33	41	34	37	38	30
Young Farmers Club	30	44	56	40	45	42	29	29	39

5.5 Headline Statistics – Clubs for the over 60s and retired

- **Clubs for the over 60s and retired** – 44% did **not** have this service facility in their community.
- In terms of the **frequency** of club meetings, only 4% met daily. The majority of clubs met on a weekly or monthly basis (45% and 36% respectively).

There appeared to be more clubs available for the over 60s and retired in rural communities than for the younger age groups, perhaps a reflection on the population dynamics of most communities. Over a third of rural communities were likely to have a club for the over 60s and retired, even in the smallest population band (less than 400 people). These clubs commonly met on a weekly or monthly basis.

Figure 5.2 Proportion of communities with clubs for the over 60s and retired



5.6 Perceptions of community activities

Most respondents rated community activities as adequate (45%). The remaining respondents tended to perceive community activities positively (29% rated activities as 'good'). However, over a quarter (26%) rated the level of activity as bad.

These conflicting views were reflected in the comments provided by clerks representing these communities. Some highlighted the positive aspects of community involvement:

"All down to local individuals who organise events."

"Despite being isolated there is a community spirit and many activities take place involving most of the community."

Whilst other community clerks highlighted the lack of social cohesion:

"People do not support what is available locally and groups are closing for poor membership. Working mothers do not have the time to support weekly activities."

"There is not a community 'heart' or spirit here, something could be done to encourage this but volunteers would be required."

Transport provision is of key importance in rural communities and the following section outlines data on bus provision, whether there is a railway station in the community, and various community transport services

6.1 Headline Statistics – Bus and train services

- Almost two in five communities operated a bus service every day of the week (39%), whereas 29% operated six days a week and 15% operated on fewer days
- Respondents reported that 16% did **not** have this service facility in their community on any day of the week.
- **Peak Bus Service** (0700-0900 and 1500-1800)- 52% did **not** have this service facility in their community
- **Off-peak Bus Service** (Between 0900 and 1500)-30% did **not** have this service facility in their community
- **Evening Bus Service** (After 1800) - 69% did **not** have this service facility in their community
- **Train service and station** - 86% did **not** have this service facility in their community (81% in 2004)

Respondents suggested that public transport was inconsistently provided within rural communities. Bus services varied, not only in the number of days they operated but also in the times of day they passed through the community. Train services were only available to a small proportion of communities.

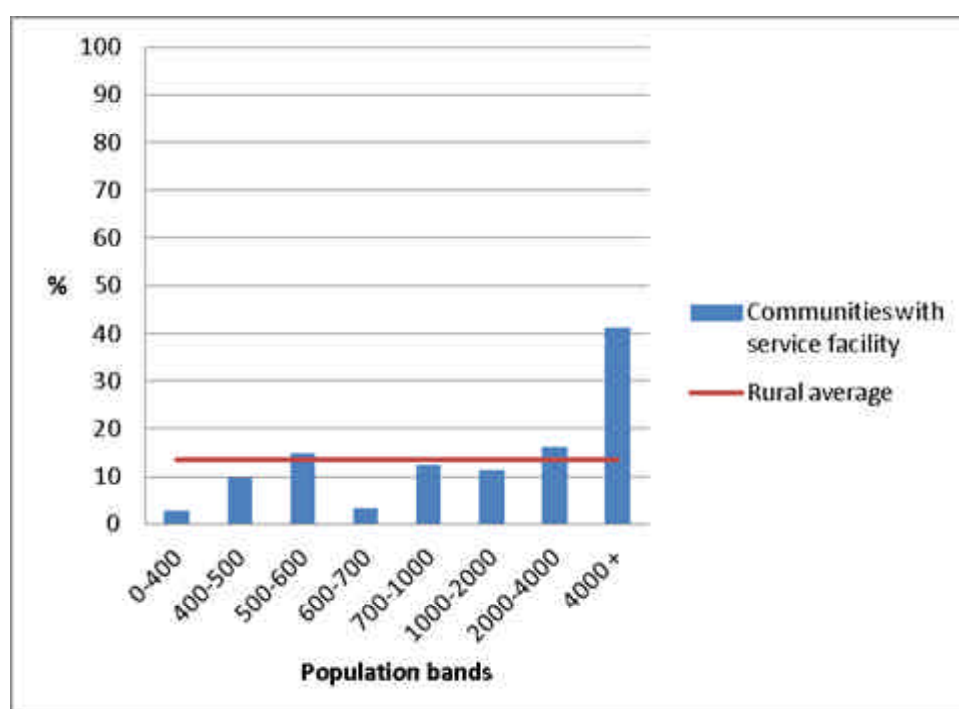
Table 6.1 indicates that bus services that operated at peak hours were fairly limited for large parts of rural Wales, with less than half of communities having such services in population bands below 1000 people. Off-peak bus service provision had improved levels of service at all population bands. However, this service level declined for the evening period.

Figure 6.1 shows that train station provision was dependent on population size with only the higher population bands having significant provision.

Table 6.1: Proportion of communities with bus services

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
Bus Service (peak)	24	20	22	37	46	55	78	76	48
Bus Service (off -peak)	81	61	63	73	61	71	69	79	69
Bus Service (evenings)	14	5	15	20	25	36	57	62	31

Figure 6.1 Proportion of communities with a train station or service



6.2 Perceptions of Public Transport

Almost half of the respondents (48%) judged public transport to be adequate in their community. The number of communities that rated the service as bad (40%) far outweighed the number that considered it good (13%) by more than a 3:1 ratio. Many community clerks pointed to the unreliability, poor frequency, expense and inconvenience of public transport. As this community clerk observed:

"You can get to school, work and shops etc but not go out in the evening by public transport."

Additionally, some respondents suggested that where public transport did exist, the system was not integrated, as the following quotations illustrate:

"Bus timetables do not tie in with train arrivals."

"Those services just outside our area, that do run, suit the operators and not potential customers. They always arrive just after the trains at both potential connection points!"

"People rely on what there is available but I don't know if the timing is ideal."

However, this respondent argued:

"We have to be realistic any bus service is better than none..."

In terms of expense, this respondent compared public and private transport:

"It is expensive and usually cheaper to drive even if only one person travelling."

Indeed, the need for private transport in rural areas was noted by this respondent:

"Life in rural areas is very difficult if you don't have your own car."

As observed in the WRO Services reports of 2004 and 2007, there appears to be a

vicious circle associated with public transport in rural areas. Public transport does not meet specific needs; demand and use decrease; and consequently the perceived need for extensive public transport provision diminishes.

Supporting this view, these community clerks observed:

"Gets less every year and we never had a lot."

"Demand and use are often contradictory."

6.3 Change in provision since 2007 – Public Transport

The survey explored perceptions of change in public transport between 2007 and 2010. The majority of respondents (57%) indicated that provision of public transport had remained the same in their community. However, it must be noted that 'staying the same' could potentially equate to continuing without a service or with low service levels. A more meaningful indicator is whether the levels of provision have increased or decreased. Only 7% of respondents argued that public transport provision had increased, whereas 27% argued it had decreased. Surprisingly, 9%

of community clerks did not know if there had been a change in public transport provision for their community.

6.4 Headline Statistics – Community transport

- **Dial-a-ride** –79% did **not** have this service facility in their community
- **Community minibus/taxi** -80% did **not** have this service facility in their community
- **Supermarket bus**-91% did **not** have this service facility in their community
- **School bus**-14% did **not** have this service facility in their community

Other forms of transport were explored by the survey. Specifically, these were community transport provision i.e. dial-a-ride; community run minibus/taxi; and supermarket and school bus services. Fewer than one in five of responding councils had a dial-a-ride scheme or community run minibus/taxi services. The majority of communities were served by a school bus. However, a relatively small proportion (9%) had a supermarket bus. These headline statistics are analysed further in Table 6.2 below in relation to population size of responding Town and Community Councils.

Table 6.2: Proportion of communities with community transport

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000+	Total
	%	%	%	%	%	%	%	%	%
Dial-a-ride	16	17	26	20	20	19	20	38	21
Community-run minibus / taxi	11	20	22	20	14	14	27	44	20
Supermarket bus	5	0	4	0	9	4	20	29	9
School Bus	84	85	81	80	88	89	84	94	86

Table 6.2 displays community transport provision of various types. Dial-a-ride schemes appear fairly popular as approximately a fifth (21%) of all communities had access to this type of community transport. The exceptions were when the population ranged between 500-600 people or was above 4,000 (provision here, was more likely) and in communities with below 500 people (provision less likely). Community run mini-bus or taxi services were less common in more sparsely populated communities (the 500-600 population band being the exception). Similarly, supermarket buses seemed to serve larger settlements rather than the communities with low populations. All community population bands were relatively well served by at least one school bus. However, there was a minority of communities without this service.

There were a number of reports pointing to problems with public transport. For example, this respondent observed:

“Community bus is good in local area but not bus service, the frequency is very poor, hence without private transport travel is difficult and inconvenient.”

These types of issues were emphasised by other respondents who described how a public transport bus travelled through part of their community while other parts had no service apart from dial a ride. In general, public transport across rural areas of Wales was perceived as variable. As this community clerk commented:

“Bus service varies across community council area. Inter community service is poor.”

A number of communities provided evidence of their attempts to bridge the gaps left by the relatively low levels of provision of community transport and public transport in rural Wales.

7.1 Headline Statistics

This section examines the findings from the questionnaire on recycling services that were provided by the local authority, town or community council, or voluntary organisations. These included bottle banks, clothes, paper, and cans/plastics and the collection of these items.

Services Provided by Local Authority:

- **Bottle Bank** – 42% did **not** have this service facility in their community
- **Clothes Recycling** – 64% did **not** have this service facility in their community
- **Paper Recycling** – 36% did **not** have this service facility in their community
- **Cans and plastics** – 39% did **not** have this service facility in their community
- **Regular door to door collection** (of any of the above) – 30% did **not** have this service facility in their community

In total, when combining all recycling facilities and mechanisms for provision (which also included provision by town and council and charities), some 92% of respondents had access to at least one form of the above community recycling facilities.

Looking specifically at local authority provision, the most common form of recycling was paper, followed by cans/plastics and bottles, and the least common form of recycling was clothes.

Table 7.1 shows that recycling facilities provided by the Local Authority were more prevalent in the higher population bands, with over three quarters of communities having most forms of recycling when community population exceeded 2,000.

Table 7.1: Proportion of communities with recycling facilities provided by the local authority

Community Population Size	0-400	400-500	500-600	600-700	700-1000	1000-2000	2000-4000	4000 +	Total
	%	%	%	%	%	%	%	%	%
Bottle Bank	46	49	33	53	46	64	73	85	58
Clothes Recycling	30	27	19	33	27	36	49	68	36
Paper recycling	62	46	41	63	59	69	76	88	64
Cans and plastics	57	46	33	57	52	66	76	88	61
Regular door-to-door collection of any of these	38	66	63	80	63	72	84	94	70
None (of the above)	19	12	11	10	7	5	6	0	8

The qualitative data supported these findings and whilst some respondents observed that they have to travel several miles out of the community to utilise

recycling facilities, the majority stated that their community provided some form of recycling. For example, one respondent noted:

“County Council only operates partial recycling collections, in the main village. Rural hinterland and small settlements have no recycling collections.”

Some suggested that this provision should be extended to include green waste and other forms of waste product, and had an awareness of the issues involved:

“It needs to involve commercial premises as that would reduce land fill considerably. But we are always told the cost is too high but burying it underground is the same price for domestic or commercial, I do not mean chemicals etc. but plastics, cardboard, glass etc..”

Furthermore, a number of respondents would like to have seen an extension of door-to-door recycling provision. This, as the quote below suggests, would extend recycling opportunities to less mobile social groups:

“... many do not have cars-too dd to drive-need home collection at least for the elderly.”

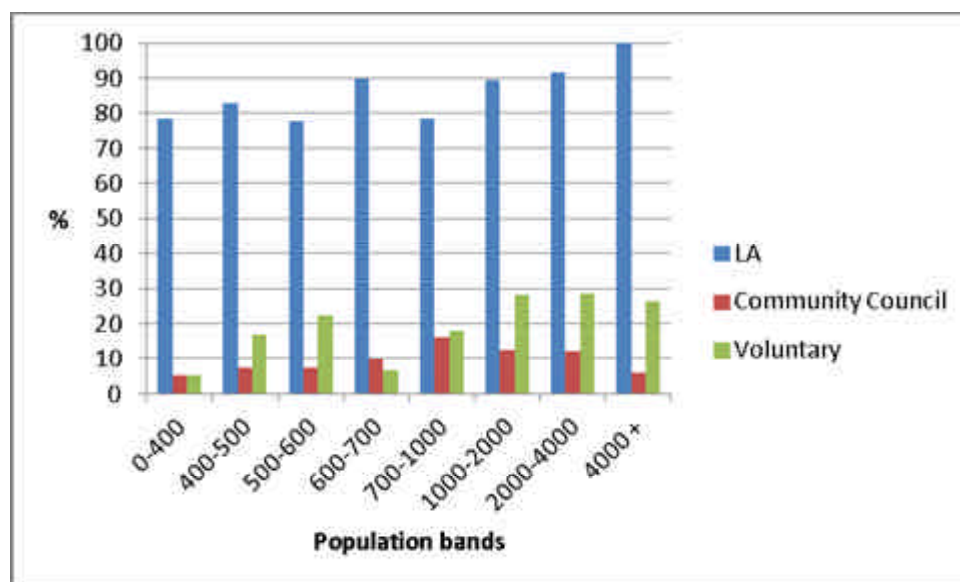
Most communities noted recent improvements in their recycling facilities while others noted provision was lacking due to difficulties in finding an appropriate site. One community explained that it was part of a Welsh Assembly funded scheme:

“We have in place a pilot scheme called Zero Waste funded by WAG.”

Figure 7.1 clearly shows that local authorities were the main providers of recycling facilities.

This held true in all community population bands. Community council facilities and those provided by voluntary organisations accounted for below 30% of provision in all communities.

Figure 7.1: Proportion of communities with recycling facilities provided by Local Authority, Community council, and voluntary organisation



7.2 Perceptions of Community Recycling

Just over half (53%) of respondents rated community recycling as good and a further 34% suggested provision was adequate. Only 13% rated the service as poor.

SECTION 8

Further analysis of qualitative material

8.1 Headline Statistics –

General provision of services

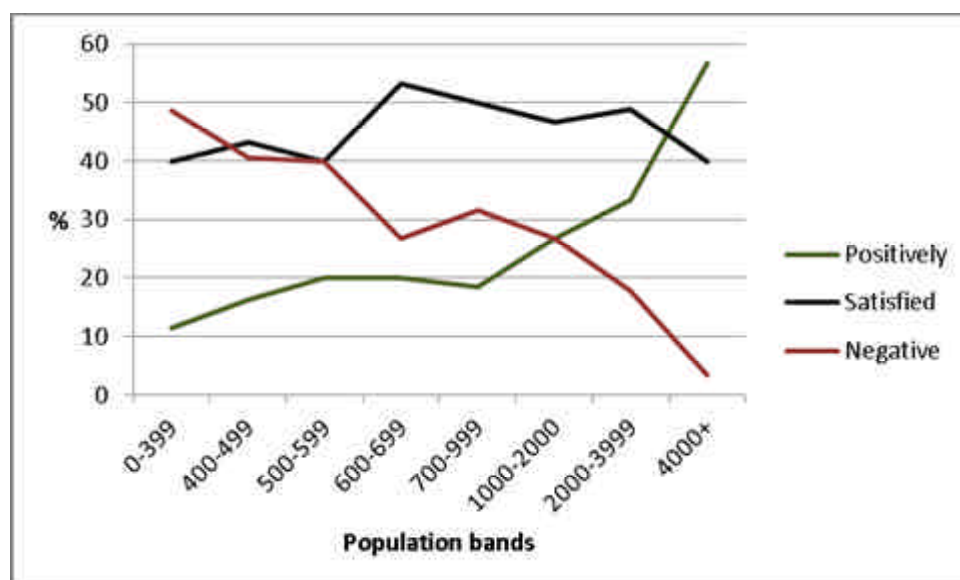
- 25% of clerks in rural Wales felt that service provision was good or very good, 46% considered it satisfactory and 29% considered it poor or very poor.

8.2 Perceptions of general service provision

Figure 8.1 shows the perception of overall service provision for each community, grouped using population bands. It is clear that as population increased the number of community clerks that perceived provision to be good or very good also increased (shown in green). Conversely, as community size decreased opinions became negative (shown in red).

Attitudes towards general service provision changed when communities reached a size of between 1000 and 2000 people. To a lesser degree, attitudes diverged also when communities reached a population of around 600 people. This link between service provision and population size has been identified for the majority of services analysed throughout the report.

Figure 8.1 Overall perception of service provision in community by population bands



At the end of the survey questionnaire there was a series of open-ended questions. These questions asked respondents to comment on service delivery in their Town or Community Council. The questions were designed to address the issues of quality and accessibility of services, and problems experienced by particular groups in the Community. Analysis of this material enables understanding of how the nature and quality of services provision impacts people at the micro-level. For consistency, given the correspondence between service provision and population size, the analysis is structured by population.

8.3 Quality and accessibility of services

It was evident from the responses that the poor accessibility and dwindling quality of provision resulting from economies of scale had left many respondents from the least populated communities despondent:

"Rural areas hide poverty by its dilution." (Pop. 0-400)

"Accessibility to services is very poor here and equally so across rural community. Unfortunately, hegemony has set in and residents feel that they must just accept the situation." (Pop. 0-400)

"Services becoming increasingly difficult to access almost nonexistent, falling electoral roll, cost of living in a upland rural area becoming prohibiting." (Pop. 0-400)

"The quality and accessibility is poor we have to travel 4 and 6 miles for any accessibility I cannot see this ever changing" (Pop. 0-400)

"This is a rural isolated, scattered population area. It is not feasible to expect the kind of services enjoyed in areas with a larger population. However we feel we are losing the few existing services (e.g. post offices) we have". (Pop. 0-400)

This left many communities with a lack of easily accessible services and reliant on

provision from larger neighbouring communities:

"Poor transport service. No shop or post office in the village. Primary and secondary schools under threat. Serious need for broadband service in order to help the rural economy. Lack of jobs. Very good local medical service. Journey of almost 30 miles to the nearest hospital with A&E department." (Pop. 400-500)

"The removal of the mobile library is a sad loss to community although a group have set up an exchange/lending community group library - which is currently not well used." (Pop. 400-500)

"... the almost total lack of the facilities regarded as normal in most areas." (Pop. 400-500)

"We've lost a lot recently - two chapels have closed; post office has had to close; and this led to the village shop also having to close." (Pop. 400-500)

"It is a large and diverse rural community with no focal point therefore provision of services is not easy." (Pop. 500-600)

"In three of these villages there are no shops, garage, pub, cafe, public transport. Many areas have no street lighting. This area is band 'D' council tax and many residents are angry that the services & facilities available are non-existent. It appears that the rural areas subsidise the nearest town (eight miles)." (Pop. 500-600)

As community population increased more people from the local area were available or collaborated to help bridge the gaps in access to services:

"The elderly in our village miss the mobile library very much. The post office seems to be getting further and further away from the village. The bus service is very poor, which means we have no choice but to use our cars. In general our village is a content place to live - we have a lot of activities planned by ourselves..." (Pop. 600-700)

"Elderly and rural community relying heavily on good will of neighbours for care, travel, shopping and prescriptions." (Pop. 700-900)

"The nearest town needs a 'one-stop' shop for provisions, and so that people can visit and are offered local services. The five parishes have formed a partnership to try to facilitate this." (Pop. 700-900)

In some cases there was also a feeling of neglect:

"General feeling that local authority is prioritising the main centres within the country and turning their backs on rural settlements." (Pop. 700-900)

While others implied poor services were inherent in rural areas

"As this is a rural area services are generally poor." (Pop. 700-900)

In communities with a large population base, comments became more complimentary towards service quality and accessibility, and some improvements were noted. Public transport and hospital access were still commonly noted issues.

"[Community] is a rural area with the nearest town being about seven miles away - services provided locally are adequate, and services are also available at the nearest town too." (Pop. 1000-2000)

"The present government is forcing us to reduce every activity we accept." (Pop. 1000-2000)

"Considering the financial issues, I would say that the service on the whole is acceptable." (Pop. 1000-2000)

"Public transport is a major concern. Even if we could access a bus service though the village twice a week Weds and Sat it should help. Most people have cars but some elderly and of course the younger non-driving residents cannot easily reach the larger towns to shop and socialise." (Pop. 1000-2000)

"The bus service has improved but is still poor." (Pop. 1000-2000)

"Whenever changes are made they are rarely for the better." (Pop. 2000-4000)

"Financial cut backs will hit services badly." (Pop. 2000-4000)

"Many of the services are under threat because of cuts to public services. It is essential that the services are in the town. If the services were not in the town then usually the nearest provisions are over 20 miles away, which is completely unreliable." (Pop. 2000-4000)

"Like most areas all of our services are under threat of closure, reduction or transfer. But I consider our hospital care and treatment to be our greatest problem. We no longer have 24hr ambulance cover our local hospital is virtually closed and they are downgrading Aberystwyth and discussing downgrading Shrewsbury. Where do they think people in mid Wales will go for hospital treatment, let alone the delays etc when you are finally allowed into one! I could go on with but it will not make the slightest difference." (Pop. 2000-4000)

"Generally, access and services in the area are good. Also, the standard of most services such as roads is adequate. Waste disposal and recycling are very good." (Pop. 4000+)

8.4 Problems experienced by particular groups

The responses indicated that there were some groups of people who were more susceptible to changes to the levels of service provision. These included elderly people, young people and those who could not drive. Many comments referred to problems connected to transport issues, including the importance of good road maintenance in rural areas. According to one respondent, rural roads are often not primary routes and hence not given priority in terms of maintenance. The road network in rural areas can come under

particular stress due to adverse weather conditions. As this respondent observed:

"Young and very old suffer as we are rural. In the mountains the roads just have to be gritted. As we cannot get out we become isolated. Buses stop and so no schools, also old cannot get out for food. Road maintenance is so, so important."

For young people, it was also noted that there was a lack of amenities available in the local community. Similarly, a number of respondents highlighted the inadequate provision of care facilities for elderly people.

Interestingly as community size increased the types of problems highlighted subtly changed. In the least populated communities, respondents tended to complain of a lack of any type of reasonable service provision, and of the difficulty in accessing those services that did exist, especially for the elderly and young and those without a car. Some clerks described their communities as 'forgotten' or 'depressed' and lacking a 'social hub':

"No village shop. Poor provision of public transport. No meals on wheels provided for the elderly. High percentage of residents are elderly but due to lack of services they are moving to neighbouring town. Houses which become vacant are taken up by incomers to the area who have little or no interest in the community. The village is fast becoming a dormant village." (Pop. 0-400)

"Elderly people have to travel by bus for everything." (Pop. 0-400)

"The bus services are inadequate to allow for access to common services even if they existed. It is appreciated that this is a difficult problem to solve without substantial subsidies. It is virtually a necessity for the inhabitants of the community council area to possess their own means of transport with a substantial number having two cars." (Pop. 0-400)

"We do not have any services in our area, we only have the church, we did have a local pub which was the 'hub' of the community but this closed approx eight years ago, we also had a post office but this closed six years ago." (Pop. 0-400)

"Lack of affordable housing is a problem-increasing number of holiday homes and lets. Ageing population-growing need for care support particularly for those whose relatives live away." (Pop. 0-400)

"Major health facilities seem to be going further away" (Pop. 400-500)

"Need more help and facilities for young people. Services for the elderly and disabled are not sufficient". (Pop. 400-500)

"No broadband coverage and no hope of it ever coming. We have to pay for satellite broadband, some on the edge of the area near the exchange in an adjacent area get coverage, but the vast area is not provided for. Very sore point!!" (Pop. 500-600)

"The village ... like many others in Wales has suffered a downturn in the number of shops and public houses (the last of 3 public houses closed last year) consequently people are just not able to socialise as they used to." (Pop. 600-700)

As community size increased, issues related to employment and problems with existing services were emphasised. The difficulties faced by young people in relation to services were more commonly discussed. Larger communities also had a larger population to draw upon for informal help to more vulnerable residents:

"Residents wishing to use public transport to get to work find it very difficult as service times have been reduced." (Pop. 700-1000)

"If you have no access to transport, or are not able to drive, access to anything is a problem. Neighbours become aware of those that need help and some services and help can be

arranged to come out to the villages.” (Pop. 700-1000)

“There is nothing much in the area for the youths and elderly. The village hall is outside of the village so not easy for elderly to access, village post office closed a couple of years ago and pub no longer provides food.” (Pop. 700-1000)

“1) Currently you have to travel 40 miles to a hospital that has specialist units for people with mental disabilities. 2) The new policing policy means that the main station is 18 miles away - An issue in an emergency. 3) Problems with electricity and gas - everything has to be dealt with via the phone or internet - very unfair on the elderly, who are not used to telephones or the internet.” (Pop. 1000-2000)

“I am not aware of any serious complaints in any particular area.” (Pop. 1000-2000)

“There is a high percentage of adults in the community and it is felt that the services do not reflect this fact.” (Pop. 1000-2000)

“Anti-social behaviour by youth inhibits the elderly. Financial cuts to councils will impact badly on services.” (Pop. 2000-4000)

“Lack of provisions and facilities and activities available for young people and particularly teenagers.” (Pop. 2000-4000)

“Unemployed from the village have to sign on in Merthyr Tydfil, which costs them £4 bus fare. Nearest job centre is also in Merthyr Tydfil.” (Pop. 2000-4000)

“For work a car is essential and this is very expensive for the young. Hospital visiting is almost impossible without a car.” (Pop. 4000+)

There were, then, a range of different types of service provision issue revealed by the quantitative and qualitative survey evidence. Some of these issues affected all members of the community and some affected certain social groups. A feature of the analysis is that specific service issues seem to be associated with population size. Other issues could occur in all types and sizes of rural community. Some of the service problems identified by the survey appeared to have been accepted by residents as a necessary, if somewhat unfortunate, part of rural living. However, other service issues gave rise to perceptions that some rural communities had been relegated to service poverty compared with more urban areas.

9.1 Introduction

Section nine of the report provides an analysis of longitudinal change in service provision within rural Wales. This involved comparing responses from town and community councils that were surveyed in 2004 and again during 2010. This section investigates a sub-sample of these two surveys, providing ‘**actual**’ change in service provision rather than the overall cross sectional difference between both surveys¹. Responding communities from both years were matched using GIS and the corresponding attributes linked within both the 2004 and 2010 databases. This enabled change in service provision over a six year period to be identified.

At the basic descriptive level, change is reported for the majority of services in the survey. Further analysis was conducted on a selection of services that had undergone significant change. Population bands were used to determine where change occurred within this subset. The longitudinal sample contained 223 communities, and these were divided into population bands: 25% of these communities contained fewer than 500 people; 33% had between five hundred and 1,000 people; 21% contained between 1,000 and 1,499 people; and 22% contained larger populations. Broader population bands were used for the longitudinal population analysis to ensure sufficient communities were contained in each population group. The results presented in this section refer to percentage point differences between both survey years.

¹ Comparing the overall cross section may introduce bias into the sample by incorporating additional communities (hence not sampling ‘like’ with ‘like’).

9.2 Headline Statistics

Longitudinal sample:-

- **Post office:** In 2004, 70% of communities contained a post office, whereas the proportion was 52% in 2010 (**a decrease of 18 percentage points**)
- **Primary school:** In 2004, 81% of communities contained a primary school, whereas the proportion was 71% in 2010 (**a decrease of ten percentage points**)
- **GP:** In 2004, 22% of communities contained a GP practice, whereas the proportion was 23% in 2010 (**an increase of one percentage point**).
- **Dentist:** In 2004, 8% of communities contained a dental surgery, whereas the proportion was 13% in 2010 (**an increase of five percentage points**). This was mainly due to a comparative increase in private dentists.
- **Bank or Building Society:** In 2004, 13% of communities contained a bank or building society, whereas the proportion was 16% in 2010 (**an increase of three percentage points**). This was mainly due to an increase in part time banks.
- **Pub:** In 2004, 92% of communities contained a public house, whereas the proportion was 81% in 2010 (**a decrease of 11 percentage points**).
- **Petrol station:** In 2004, 44% of communities contained a petrol station, whereas the proportion was 37% in 2010 (**a decrease of seven percentage points**).

- **Permanent shops:** In 2004, 38% of communities contained a shop, whereas the proportion was 40% in 2010 (**an increase of two percentage points**). There was an increase in food only shops and decrease in non-food shops.
- **Libraries:** In 2004, 84% of communities contained a library, whereas the proportion was 78% in 2010 (**a decrease of five percentage points**). All reduction from mobile libraries.
- **Groups for the elderly:** In 2004, 19% of communities contained a group for the elderly, whereas the proportion was 13% in 2010 (**a decrease of six percentage points**).
- Compared with 2004, more **village and church/chapel halls** were used for public use in 2010. There were fewer **community centres and school halls** used for this purpose.
- In 2004, more communities contained a **sports hall** (18% in 2004 and 16% in 2010 – a decrease of two percentage points), **swimming pool** (11% in 2004 and 8% in 2010 – a decrease of three percentage points), and **formal play area** (73% in 2004 and 65% in 2010 – a decrease of eight percentage points) compared with 2010. But more communities reported having a **playing field** (61% in 2004 and 70% in 2010 – an increase of nine percentage points).
- In 2010, fewer communities had a **bus** operating at peak times, during the day and in the evening compared with 2004. There was also change to the number of days the bus service operated (see Figure 9.1).

In 2004, 21% of communities were operating a dial-a-ride or a community run minibus/taxi service, whereas the proportion was 25% in 2010 (**an increase of four percentage points**).

- In 2004, 63% of communities had recycling services in operation, whereas the proportion was 93% in 2010 (**an increase of 30 percentage points**).
- In 2010, fewer communities offered **support services** compared with 2004. Table 9.1 shows the data for support services.

Table 9.1 Change in support services between 2004 and 2007

Support service for:	2004 (%)	2010 (%)	Percentage point decrease
the elderly	39	14	25
the young	17	15	2
those with mental or physical disabilities	15	2	13
the unemployed	4	2	2
the homeless	4	2	2
those with drug/ alcohol problems	5	3	2
those experiencing domestic violence	4	2	2

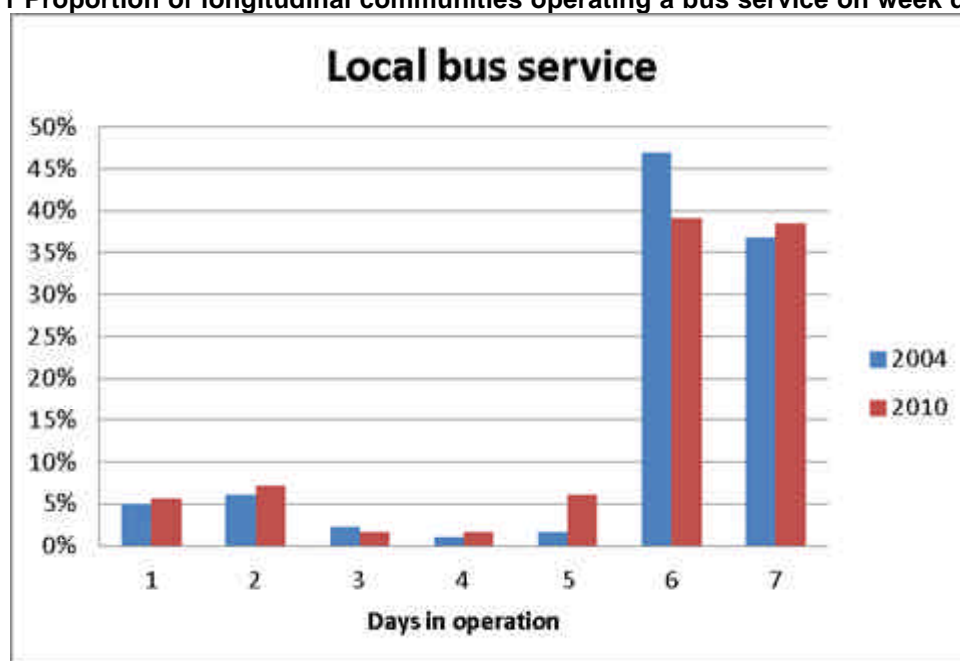
In general most communities experienced a decline in levels of service provision. Clearly, the service in which most communities witnessed a change between 2004 and 2010 was the post office. This was probably associated with the Network Change Programme as discussed in section 1.3. Other services that had higher levels of change within communities were primary schools and public houses, both witnessing a similar proportional decline in numbers. Both services were seen to have the potential to act as 'hubs' of a community and the ability to serve multiple purposes within one property. For example, schools acted

as a place for public meetings and pubs offered post office facilities. Therefore, a decline in provision to this type of service could result in potentially more than one service being lost to the community. The number of communities that contained a GP surgery remained relatively static with only a slight percentage point increase.

The proportion of communities with dentists and banks had risen between 2004 and 2010. However, this was mainly due to a change in composition within these services, with proportionally more private dentists and part time banking facilities becoming available. There were fewer communities with petrol stations in 2010 compared with 2004, which had the potential to force residents in rural communities to make longer journeys to refill their vehicles. In addition, some petrol stations provided basic food and non-food items provisions (as noted in section 1.7).

Therefore, reductions in this service also had the potential to reduce the number of communities with shops. Libraries were available in fewer communities in 2010 compared with 2004. This was mainly due to the reduction in mobile libraries. Similarly, groups for the elderly were also less likely to be found in rural communities, together with swimming pools, sports halls and formal playing areas. There were, however, more communities with recycling facilities. Public transport bus services appeared to have been withdrawn, as fewer communities reported having a service at any point during the day or night. There were also changes to the number of days these services operated within the community between 2004 and 2010 as shown in Figure 9.1. In contrast, there had been an increase in communities operating dial-a-ride or a community run minibus/taxi over this period.

Figure 9.1 Proportion of longitudinal communities operating a bus service on week days



9.3 Population analysis

This section provides an analysis of longitudinal change between 2004 and 2010 for communities within broad population bands. As the longitudinal analysis uses a subset of rural

communities, this section incorporates larger population bands to ensure sufficient communities were within each band and that they were of roughly equal size. The population analysis was conducted on selected services that had shown noteworthy change.

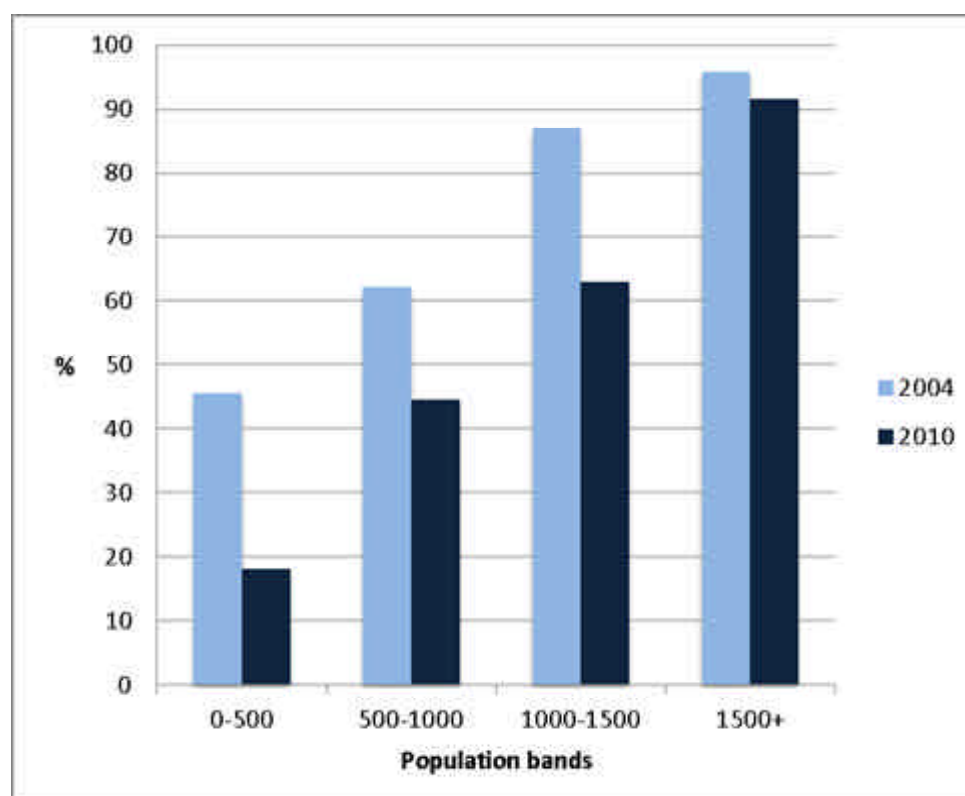
9.3.1 Post Offices

In Table 9.1 and Figure 9.2 it can clearly be seen that the proportion of communities with a post offices fell the most in rural communities with a population below 500. The proportion of communities with a post office also fell in all other population bands. However, the percentage fell least in the more populated communities (over 1500 population).

Table 9.1 Proportion of longitudinal communities with a post office

Community Population Size	0-500	500-1000	1000-1500	1500 +	Total
	%	%	%	%	%
Post office (2004)	45	62	87	96	70
Post office (2010)	18	45	63	92	52

Figure 9.2 Proportion of longitudinal communities with a post office



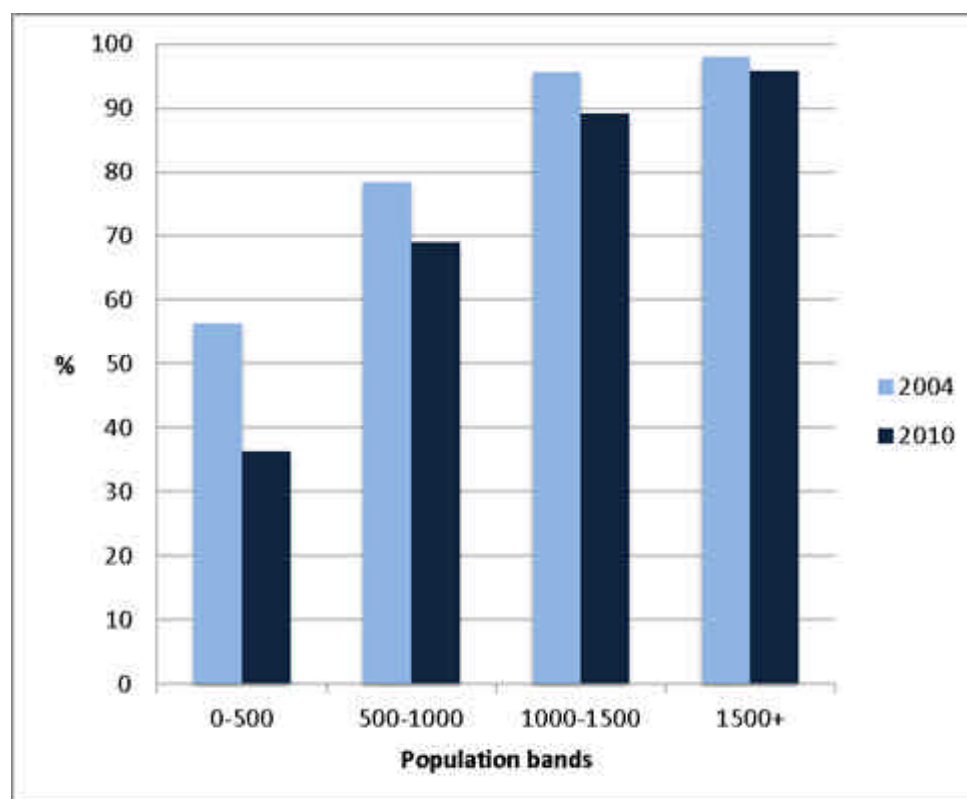
9.3.2 Schools (ages 5-11)

The proportion of communities with a school decreased for all age bands between 2004 and 2010. Figure 9.2 shows that schools (ages 5-11) were most likely to be lost from smaller population bands than larger. There was a 20 percentage point difference in the former and only a two percentage point fall in the latter.

Table 9.2 Proportion of longitudinal communities with a school (ages 5-11)

Community Population Size	0-500	500-1000	1000-1500	1500 +	Total
	%	%	%	%	%
School for ages 5-11 (2004)	56	78	96	98	81
School for ages 5-11 (2010)	36	69	89	96	71

Figure 9.3 Proportion of longitudinal communities with a school (ages 5-11)



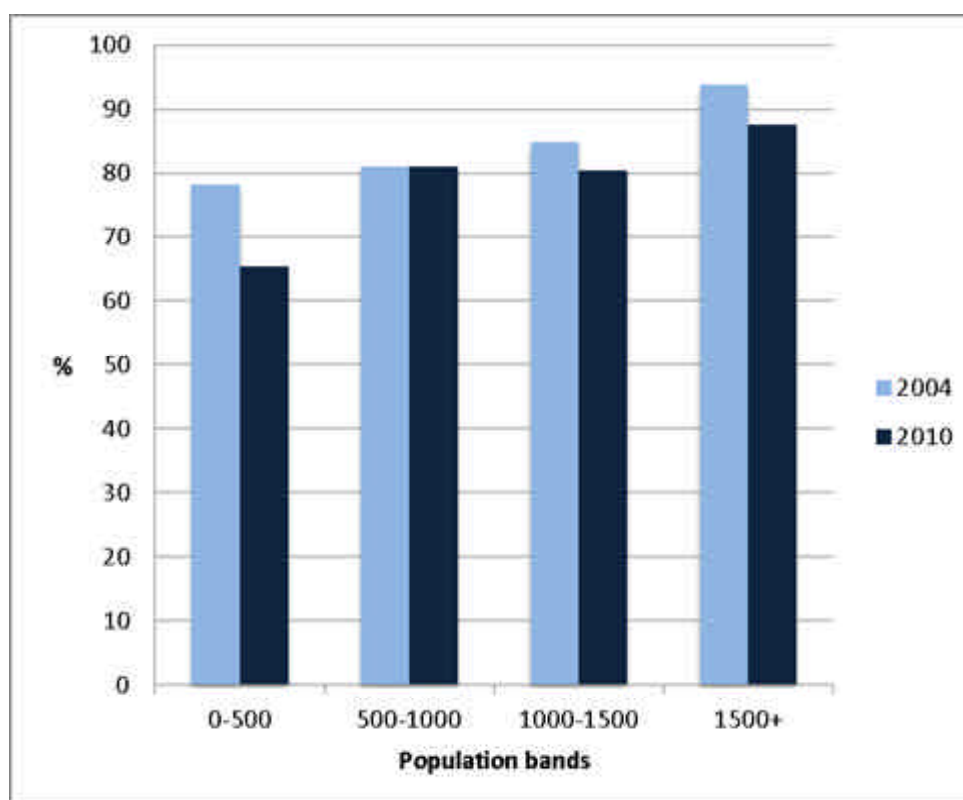
9.3.2 Libraries

Aside from communities with a population between 500 and 1000 the proportion of communities with a library decreased between 2004 and 2010. Figure 9.4 shows again that library services were most likely to be lost from the smallest population band.

Table 9.3 Proportion of longitudinal communities with a library

Community Population Size	0-500	500-1000	1000-1500	1500+	Total
	%	%	%	%	%
Library (2004)	78	81	85	94	84
Library (2010)	65	81	80	88	78

Figure 9.4 Proportion of longitudinal communities with a library



10.1 Concluding remarks

The findings from the 2010 survey reveal that each community had its own unique service requirements and pressures but that these tended to vary with population size. Certain services were more commonplace in rural Wales. For example over half of the communities surveyed had at least one of the following: general store, post office, pub (that had games), petrol station, playgroup, primary school, place of worship, village/church hall, formal play area, playing field, football or rugby club, club for retired people, off-peak bus service, crime prevention advice, or recycling service. Many other services were less prevalent. In addition, the provision of even these typical services tended to fall as community population size decreased.

In general, for many rural communities, services appeared to have reduced or continued with low levels of provision. In addition, communities that rated their services positively were consistently in the minority. However, there were notable exceptions. For example, although the provision of some medical services and schools had reduced in some communities, perceptions of the level of provision that remained were generally good. Services with raised levels of provision included recycling facilities and broadband; both now available to some degree in the majority of communities.

Since the first WRO rural services survey in 2004, Wales, alongside many other countries, has witnessed an economic downturn. Whether or not this has ended is a matter for debate. What is clear is that cuts to public sector services and tightening family budgets will place further strain on existing service provision in rural Wales at a time when these services are potentially most needed. In this report, longitudinal comparisons have been made in an attempt to capture change during

this period and highlight some of the possible knock-on effects of the recession. However, not all changes can be directly attributed to the impacts of the recession. For example, some facilities have been reduced deliberately with the purpose of providing more efficient, sustainable services.

A theme that endures through the three WRO services surveys of 2004, 2007 and 2010, and other WRO work such as the Deep Rural Localities survey, is the reliance on private transport for most members of rural communities. Arguably, this reliance is due to necessity rather than choice. This results in additional challenges for those not able to drive and living within service deprived communities. Particular groups, such as the young, elderly, less affluent, and those with certain disabilities, are therefore more susceptible to changes in service provision. The iteration of lower demand and use with perceived lower needs and consequent lower supply has been discussed earlier in this report.

A number of communities had developed their own unique coping strategies in response to the service level available to them within their communities. Services, events and facilities were provided, for some, informally by volunteers, friends and family.

In summary, taken together with the WRO Services surveys of 2004 and 2007, and with other WRO work, this 2010 services survey is an integral part of an evolving rich data source for rural Wales. An important aspect of its utility is that these data, augmented by future WRO work, allow for a valuable time-series analysis of changing levels of service provision across rural Wales, informing policy debates and decision-making.

APPENDIX A

Ysgol Cynllunio Dinesig a Rhanbarthol
Prifysgol Caerdydd, Rhodfa Brenin Edward VII
Caerdydd, CF10 3WA
Ffôn: 0292074970

www.arsyllfawledigcymru.org.uk



School of City and Regional Planning
Cardiff University, King Edward VII Avenue
Cardiff, CF10 3WA
Tel: 0292074970

www.walesruralobservatory.org.uk



SERVICES QUESTIONNAIRE

Dear Madam/Sir,

Please find enclosed a copy of the questionnaire for the Wales Rural Observatory Services survey for 2010, for completion by yourself or the chair of your council. The Wales Rural Observatory is a research centre at Cardiff and Aberystwyth universities and is funded by the Welsh Assembly Government to undertake economic, social and environmental research in rural Wales. For information on the Wales Rural Observatory, including a range of research reports, please visit our website: www.walesruralobservatory.org.uk.

This survey is supported by One Voice Wales, the representative organisation for community and town councils throughout Wales. All of the questions relate to your community or town council area and the information will be used by the Wales Rural Observatory to develop a broader understanding of service provision across Wales; to assist One Voice Wales; and to inform the policies of the Welsh Assembly Government. Please note that completion of the questionnaire is voluntary and the information that you provide will be treated as confidential. Completion of the questionnaire should take approximately 20 minutes.

The preferred method for completion is online. To access this questionnaire, please look under the NEWS section at this website address:
<http://www.walesruralobservatory.org.uk/eng/main-e.html>

Alternatively, if you prefer to complete the enclosed paper copy, please return it in the Freepost envelope provided.

Please reply by the 1st December 2010.

Thank you for taking the time to complete this questionnaire.

Yours faithfully,

Jonathan Radcliffe

Email: radcliffej@cardiff.ac.uk

Rural Services Survey 2010

Please fill in the name of your Town or Community Council in the box below.

Town / Community Council name | _____

All questions, unless stated otherwise, refer to the Town or Community Council area stated above, which will be referred to as your 'local area' throughout the questionnaire.

Q1 How would you rate the **general** provision of services in your local area?

Very Good

☐ 1

Good

☐ 2

Satisfactory

☐ 3

Poor

☐ 4

Very Poor

☐ 5

Section 1 – Shops and Other Services

Q2 Please indicate where the nearest **permanent shops** are located

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
Major Supermarket (e.g. Tesco, Asda, Sainsbury's)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
General Stores (food and non-food)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Food Only	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Non-food Only	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9

Q3 If located in your local area please indicate if the number of **permanent shops** has changed since 2007.

Increased

☐ 1

Decreased

☐ 2

Stayed the same

☐ 3

Don't know

☐ 9

Q4 Please indicate where the nearest **post office** is located

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
Post Office	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9

Q5 If located in your local area please indicate if the number of **post offices** has changed since 2007.

Increased

☐ 1

Decreased

☐ 2

Stayed the same

☐ 3

Don't know

☐ 9

Q6 Does your local area hold **farmers' market**? If so, **how regularly** is it held?

Yes	No	Don't Know	More than once a week	Weekly	Fortnightly	Monthly	Less than Monthly
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8

Q7 For your local area, please write in the number of **restaurants, cafés and take-away / fast food outlets** which are open all year and the number which are seasonal. *These should be recorded according to their main business activity.*

Numbers of Restaurants (not including pub serving meals)		Number of Cafés (tea/coffee shops)		Number of Takeaways (include vans)	
Open all year	Seasonal	Open all year	Seasonal	Open all year	Seasonal
.....1	.....2	.....3	.....4	.....5	.....6

Q8 Please indicate where the nearest **petrol station and garage** are located

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
Petrol Station	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Garage (that repair cars)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9

Q9 Please indicate where the nearest **banks and building societies** are located

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
Bank (Full time)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Bank (Part Time)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Building Society (Full time)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Building Society (Part time)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9

Q10 If located in your local area please indicate if the number of **banks and building societies** has changed since 2007.

Increased	Decreased	Stayed the same	Don't know
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 9

Q11 Please write in the number of the **pubs** in your local area, which fit the following descriptions.

Numbers of pubs serving meals	Numbers of pubs not serving meals
.....1	.....2

Q12 How do you rate the level of general **retail** provision in your local area?

Good

Bad

Adequate

Please use the space below to provide any additional comments.

☐ 1

☐ 2

☐ 3

.....

.....

.....

.....

Section 2 – Medical Services

Q13 Please indicate where the nearest **medical services** are located

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
Main GP Surgery	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Community Health Centre	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Private Dental Surgery	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
NHS Dental Surgery	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Pharmacy	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Hospital (A&E)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
General Hospital (large / acute)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Community Hospital	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9

Q14 If located in your local area please indicate if the number of **medical services** has changed since 2007.

	Increased	Decreased	Stayed the same	Don't know	Comment
Main GP Surgery	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
Community Health Centre	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
Private Dental Surgery	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
NHS Dental Surgery	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
Pharmacy	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
Hospital (A&E)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
General Hospital (large/acute)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
Community Hospital	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5

Q15 How do you rate the level of **medical services** provision in your local area?

Good

Bad

Adequate

Please use the space below to provide any additional comments.

☐ 1

☐ 2

☐ 3

.....

.....

.....

.....

Section 3 – Education and Day-care

Q16 Please indicate where the nearest groups for children are located

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
Public Nurseries	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Private Nurseries	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Parent and Toddler Groups/ Playgroups	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Out of school groups	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9

Q17 If located in your local area please indicate if the number of **groups for children** has changed since 2007.

	Increased	Decreased	Stayed the same	Don't know	Comment
Public Nurseries	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
Private Nurseries	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
Parent and Toddler Groups/ Playgroups	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
Out of school groups	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5

Q18 Please indicate where the nearest types of **school** are located

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
5-11 year olds	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
School 12-16 year olds	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
17-18 year olds	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9

Q19 If located in your local area please indicate if the number of **schools** has changed since 2007.

	Increased	Decreased	Stayed the same	Don't know	Comment
School (5-11 year olds)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
School (12-16 year olds)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
School (17-18 year olds)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5

Q20 How do you rate the level of **education** provision in your local area?

Good	Bad	Adequate
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3

Please use the space below to provide any additional comments.

.....

.....

.....

.....

Q21 Please indicate where the nearest **day-care groups** are located.

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
Group for the elderly	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9
Group for people with disabilities	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 9

Q22 If located in your local area please indicate if the number of **day-care groups** has changed since 2007.

	Increased	Decreased	Stayed the same	Don't know	Comment
Group for the elderly	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5
Group for people with disabilities	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5

Q23 How do you rate the level of **day care** provision in your local area?

Good	Bad	Adequate	<i>Please use the space below to provide any additional comments.</i>
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....
		
		
		

Section 4 – Places of Worship

Q24 For your local area, please **write in the number** of places of worship.

Places of worship

.....1

Q25 If located in your local area please indicate if the number of **places of worship** has changed since 2007.

	Increased	Decreased	Stayed the same	Don't know	Comment
Places of worship	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	.....5

Q26 Please **tick the appropriate boxes** to indicate whether places of worship in your local area are used for any other purposes.

Arts/music	Public meetings	School assemblies	Other Uses (please specify)	No other uses	Don't know
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	.....4	<input type="checkbox"/> 5	<input type="checkbox"/> 6

Section 5 – Information and Welfare

Q27 For your local area, please indicate **which** of the following facilities are available.

Permanent Library	Mobile Library	Public / Council Noticeboard	Newsletter / Papur Bro	None of these
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 9

Q28 For your local area please indicate the number of **community internet facilities** available for **public use**. If possible, write in the location for each (e.g. pub, shop, school, village hall, community centre).

Community Internet Facility

Location of Internet facility (write in)

.....1

Q29 For your local area please indicate if **broadband** is available.

Yes

No

Comments

☐

1

☐

2

Q30 Please indicate where the nearest **support services** are available for the following types of people or social groups

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
Elderly People	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Young People	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Those with Mental Health or Physical Disabilities	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Unemployed	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Homeless	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
People with Drugs/Alcohol Problems	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Those experiencing Domestic Violence	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Other (please specify)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉

Q31 Please indicate where the nearest **advice services** are located.

	Within local area	Adjacent council area	Further away	If further away please indicate approx. distance (miles)	Don't know
Community Legal Service	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Counselling Service	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Citizens' Advice Bureau	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Job Centre	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉
Other (please specify)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	.....4	<input type="checkbox"/> ₉

Q32 How do you rate the level of **welfare** provision in your local area?

Good

Bad

Adequate

Please use the space below to provide any additional comments.

☐ 1

☐ 2

☐ 3

.....

.....

.....

.....

Section 6 – Recreation Facilities and Community Activities

Q33 For your local area please write in the number of **local meeting rooms / halls** available for **public use**.

Village Hall

Church / Chapel
Hall

Community Centre

School Hall

Other

.....1

.....2

.....3

.....4

.....5

Q34 For your local area write in the number of **formal play areas** with equipment for children.

Number of formal play areas with equipment

.....1

Q35 Please indicate where the nearest **recreational facilities** are located

Within local area

Adjacent council area

Further away

If further away please
indicate approx.
distance (miles)

Don't
know

Swimming Pool

☐ 1

☐ 2

☐ 3

.....4

☐ 9

Sports Hall

☐ 1

☐ 2

☐ 3

.....4

☐ 9

Playing Field

☐ 1

☐ 2

☐ 3

.....4

☐ 9

Q36 Are any of the following **sports events, tournaments** or other **community activities** held in your local area? (tick as appropriate)

Football /
Rugby

Pub
Games

Art or
Music
Events

Eisteddfod
au

Shows
(agricultural /
horticultural)

Others
(please specify)

None

Don't know

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

.....

.....

.....6

☐ 7

☐ 8

Q37 Do any of the following **youth groups/clubs** operate within your local area? (tick as appropriate)

Beavers /Cubs
/ Explorer
Scouts /
Network

Rainbows
/Brownies /
Guides
/Rangers

Youth Social
Clubs

Urdd

Young
Farmers
Club

Others
(please
specify)

None

Don't know

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

.....

.....

.....6

☐ 7

☐ 8

Q38 Do **recreational clubs for the retired or over 60s** operate in your local area, and how frequently do they meet?

Yes

No

Don't Know

Daily

Weekly

Fortnightly

Monthly

Less than
monthly

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

☐ 6

☐ 7

☐ 8

Q39 How do you rate the level of **recreational facility** provision in your local area?

Good

Bad

Adequate

Please use the space below to provide any additional comments.

☐ 1

☐ 2

☐ 3

.....

.....

.....

.....

Q40 How do you rate the level of **community activity** provision in your local area?

Good

Bad

Adequate

Please use the space below to provide any additional comments.

☐ 1

☐ 2

☐ 3

.....

.....

.....

.....

Section 7 – Transport

Q41 Please provide information about **local bus services** operating in your local area.

a) How many days each week do local buses operate? (enter number 0-7)

.....1

b) At what times of day do local buses operate?

At peak times*
(tick box)

Between 0900 and
1500 hours (tick box)

After 1800 hours
(tick box)

☐ 2

☐ 3

☐ 4

* Peak times are defined as 0700-0900 and 1500-1800 Monday to Friday

Q42 Please indicate where the nearest **train service and station** is located.

Within local area

Adjacent council
area

Further away

If further away please
indicate approx.
distance (miles)

Don't know

Train service and station

☐ 1

☐ 2

☐ 3

.....4

☐ 9

Q43 For your local area please **tick the appropriate boxes** to tell us about other **transport services** operating in your area

Dial-a-ride

Community-run
minibus / taxi

Supermarket
bus

School bus

Other
(write in)

None

☐ 1

☐ 2

☐ 3

☐ 4

.....5

☐ 9

Q44 a) Please indicate if the provision of **public transport** has changed since 2007.

Increased

Decreased

Stayed the
same

Don't know

Comment

Public Transport

☐ 1

☐ 2

☐ 3

☐ 4

.....5

b) How do you rate the level of **public transport** provision in your local area?

Good

Bad

Adequate

Please use the space below to provide any additional comments.

☐ 1

☐ 2

☐ 3

.....

.....

.....

.....

Section 8 – Crime Prevention

- Q45 Do people in your local area have access to **crime prevention advice**?
Please tick the appropriate box. If yes, please **list how this information may be obtained** (e.g. leaflets in library, police officer visits, internet etc).

Yes No Don't know

☐ ₁
☐ ₂
☐ ₃

1.....

3.....

2.....

4.....

- Q46 Has your Town or Community Council used its powers to **introduce crime prevention measures**, e.g. special constables, town / village wardens, CCTV? If yes, please **list the measures introduced**.

Yes No Don't know

☐ ₁
☐ ₂
☐ ₃

1.....

3.....

2.....

4.....

Section 9 – Community Recycling

- Q47 Please indicate if your local area has any of the following **recycling services** provided by the Local Authority, Town or Community Council, or voluntary organisation. Tick all that apply.

	Bottle Bank	Clothes Recycling	Paper recycling	Cans and plastics	Regular door-to-door collection of any of these	None
Local Authority	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₉
Town or Community Council	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₉
Voluntary Organisation	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₉

- Q48 How do you rate the level of **community recycling** provision in your local area?

Good Bad Adequate

☐ ₁
☐ ₂
☐ ₃

Please use the space below to provide any additional comments.

.....

Section 10 – Additional Information

Q49 Please list the major item(s) paid for by the local precept during the financial year 2009/2010 (please rank in order of highest expenditure).

1..... 3.....

2..... 4.....

Q50 Please use the space provided below to make any additional comments regarding the **quality and accessibility** of services in your area.

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

Q51 Please use the space provided below to make any additional comments about the **types of problems experienced by particular groups** in terms of accessing services in your local area.

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

Thank you for taking the time to complete this questionnaire. Would you be willing to take part in further research concerning some of the issues raised in this survey?

☐ 1 Yes ☐ 2 No

If YES, please provide your contact details below.

Name _____

Contact Telephone No _____

e-mail address _____

If you have any queries when completing this form please ring
Jonathan Radcliffe on 029 208 74970 or email radcliffej@cardiff.ac.uk

APPENDIX C

Ysgol Cynllunio Dinesig a Rhanbarthol
Prifysgol Caerdydd, Rhodfa'r Brenin Edward VII
Caerdydd, CF10 3WA
Ffôn: **029 208 74970**

www.arsyllfawledigcymru.org.uk



School of City and Regional Planning
Cardiff University, King Edward VII Avenue
Cardiff, CF10 3WA
Tel: **029 208 74970**

www.walesruralobservatory.org.uk



Dear Madam/Sir,

21st December 2010

Wales Rural Observatory – Rural Services Survey 2010

You will recall that we wrote to you last month regarding the above survey. Our records indicate that you have not yet returned a completed questionnaire. We appreciate that there are many pressures on your time but your input would be extremely useful and we would be grateful for your response. Consequently, we have extended the deadline for receipt of questionnaires to 31st January 2011.

One Voice Wales is supporting the survey, as it will provide important and much needed information concerning services across Wales. The survey will provide data for the Wales Rural Observatory – an independent research body, which is sponsored by the Welsh Assembly Government and charged with providing an evidence base for rural policy making within Wales.

It is crucial that the response rate to this survey is as high as possible to allow for examination of the full range of issues affecting service provision in Wales. Please help us to achieve this by completing the enclosed questionnaire. Completion of the questionnaire should take approximately 20 minutes and should be undertaken by an appropriate person, such the clerk or chair of your Community or Town Council.

The preferred method for completion is online. To complete an online version of the questionnaire, please visit the NEWS section at this website:
<http://www.walesruralobservatory.org.uk/eng/main-e.html>

Alternatively, if you wish to submit by post, please complete the attached questionnaire and return it in the Freepost envelope provided.

Thank you once again for your time and co-operation. If you have any questions concerning the questionnaire, please do not hesitate to contact Jonathan Radcliffe at The Wales Rural Observatory, Cardiff University: School of City and Regional Planning: Tel. 02920 874970. Email: RadcliffeJ@Cardiff.ac.uk

If you have already sent your questionnaire, and this letter has crossed in the post, please accept my apologies.

Yours faithfully,

Jonathan Radcliffe

APPENDIX D

