Arsyllfa Wledig Cymru
Wales Rural Observatory

Rural Household Survey

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Prifysgol Aberystwyth University

Cardiff University
Prifysgol Caerdydd

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SECTION 1 INTRODUCTION

1.1 An Outline of the Research

This report presents findings from a survey of households in rural Wales undertaken by the Wales Rural Observatory (WRO) in 2010-11. It is the third in a series of household surveys carried out by the WRO, the previous surveys having been undertaken in 2004 and 2007.

The aim of the original survey was to generate reliable and potentially comparative data on rural households in Wales. Detailed analysis of these data was subsequently undertaken using further categories, including household type, gender, age, income, social class and area. The follow-on survey undertaken in 2007 provided updated data and included a longitudinal element that enabled comparison and the identification of changes in rural households over the three year study period.

The results from the 2010-11 survey provide additional longitudinal data allowing further in-depth comparative work, which brings to light the various trends and processes impacting on rural households in Wales over time.

The questionnaire was divided into six sections, each addressing a specific rural theme. These were locality and demographics; the local social and community context; well-being and welfare; rural service provision, rural employment and the economy; and the environment. These themes are used to structure the remainder of this report.

1.2 Defining Rural Wales

The survey used the definition of rural Wales adopted in the Welsh Government's Rural Development Plan for Wales 2007-2013, which proposed the use of four categories to differentiate rural Wales from the rest of Wales.

Rural Wards	-	predominantly rural or small town population profile;
Service Centre	-	urban population profile with strong links to the surrounding rural areas;
Host Ward	-	large town population profile and playing a key role in surrounding rural areas;
Ineligible Ward	-	large town population profile with no or limited links with rural areas.

The distribution of these four types of ward is shown in Figure 1.1. Using this definition, the nine predominantly rural local authorities are covered, with the exception of the small postal sectors that coincide with Bangor in Gwynedd, the coastal region of Conwy and Denbighshire, a postal sector on the south-west border of Powys, postal sectors that coincided with Abergavenny, Caldicot and Chepstow in Monmouthshire and a large south-east portion of Carmarthenshire. Within Flintshire, Wrexham, the Vale of Glamorgan and Valley authorities the postal sectors that reside outside larger urban settlements are included. In addition the survey included the Gower postal sectors of Swansea.

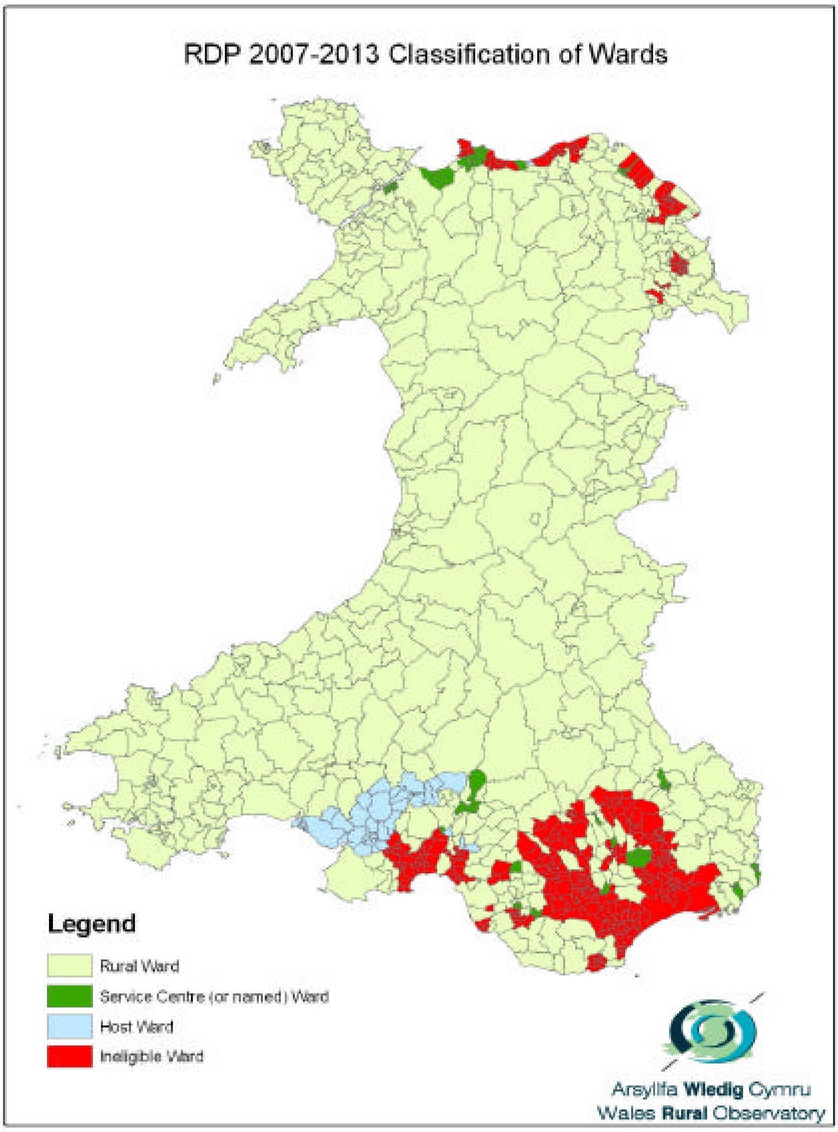
1.3 Research Methodology

The survey fieldwork was carried out between 22nd of November 2010 and 9th January 2011. Respondents who had participated in the 2007 survey were asked if they were happy to be contacted for the next stage of the research and those who agreed made up the longitudinal sample for the 2010-11 survey, which comprised 3,051 households. Of these, 1,158 were converted to complete interviews and the remaining interviews (2,904 households) were drawn from a sample of telephone numbers, which was structured by quotas for the Local Authority areas, gender, age and economic activity. Table 1.1 shows the distribution of respondents across the different Local Authority areas that comprise rural Wales.

During the interview, respondents were asked to provide information about themselves, their household and other individuals who lived within the household.

Interviewers made use of three basic types of questions during the telephone survey*:* multiple choice or attitudinal statements; numerical or factual questions; and textual open-ended questions. The interviews lasted approximately 30 minutes. All respondents, regardless of where they lived, were offered the choice of being interviewed in either Welsh or English. No Welsh interviews were requested by respondents.

Figure 1.1 Map showing Classification areas in Wales.



Source: Welsh Assembly Government (2006)

Table 1.1 The distribution of participants across Local Authorities in Wales

Local Authority	% of households across 'rural Wales'	% of all interviews
Isle of Anglesey	6%	6%
Bridgend	4%	4%
Caerphilly	4%	4%
Carmarthenshire	7%	7%
Ceredigion	6%	6%
Conwy	10%	10%
Denbighshire	8%	8%
Flintshire	5%	5%
Gwynedd	10%	10%
Merthyr Tydfill	1%	1%
Monmouthshire	4%	4%
Neath Port Talbot	4%	4%
Pembrokeshire	11%	11%
Powys	11%	11%
Swansea	2%	2%
Vale of Glamorgan	4%	4%
Wrexham	5%	5%

SECTION 2 LOCALITY AND DEMOGRAPHICS

2.1 Introduction

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

In-migration to rural areas is perceived to have some beneficial effects such as countering rural out-migration; re-energising rural economies; and maintaining a demand for services in rural areas. The perceived negative effects of rural in-migration include the dilution of rural culture and social capital; an un-balanced and ageing population profile; conflicts in the countryside; and rising rural house prices. On the other hand, out-migration is seen to have a major impact on rural areas, particularly as a result of the loss of young people, who are either unable to afford housing or are unable to find employment. Rural Wales, generally, has a unique language and culture and is perceived to be particularly vulnerable to the detrimental effects associated with both in- and out-migration.

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

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

2.2 Demography and Household Structure

In relation to household size he survey results indicate that 24% were single-person households; 40% contained two people; 16% three people; and 20% had four or more people.

With regard to gender, 54% of the respondents were female and 46% were male. Table 2.1 shows the age profile of the respondents.

Table 2.1 Age profile of respondents

Age group	Respondents
16-24	3%
25-34	9%
35-44	14%
45-54	23%
55-59	12%
60-64	13%
65-74	19%
75+	7%

In terms of household tenure, results reveal a high proportion of homeowners without mortgages (49%). The next most common type of household tenure was ownership through a mortgage, accounting for just over a third (34%) of households. This was followed by private rental (7%) and social rental (8%).

As might be expected, householders in the upper age categories were more likely to own their own houses outright; 72% of the over 55s owned their own property, compared with 17% of the under 35s. The under 35s had a higher likelihood of renting from a private landlord (17%); the local authority (7%); or a housing association (6%) than their older counterparts. Table 2.2 shows the relationship between household tenure and age.

Table 2.2 Household Tenure by age

Tenure	All	16-34	35-54	55+
Owned Outright	49%	17%	27%	72%
Owned on a Mortgage	34%	49%	57%	15%
Rented – Local Authority	4%	7%	3%	4%
Rented-Housing Association	3%	6%	2%	3%
Rented-Private Landlord	7%	17%	9%	4%
Other	1%	4%	1%	1%

2.3 Area and type of settlement

Respondents were asked to define the type of settlement in which they lived using one of seven categories; a big city, the suburbs or outskirts of a big city, a smaller city, a town, a country village, a property or farm in the country, and a mixture. As in previous surveys, the highest proportion of respondents (49%) stated that they lived in a country village and a third that they lived in a town. A further 14% indicated that they lived in a property or farm in the open countryside. Only a small number of respondents stated that they lived in a city – either within or on the outskirts of a big city (2%) or in a smaller city (1%).

In order to further investigate patterns of residence, respondents were also asked to define the type of settlement in which they had spent most of their lives. Similar to the previous surveys, the findings indicate that just over a third (36%) of respondents had spent most of their lives in a village; 34% in a town; 10% in a property or farm in the country; 16% in or around cities; and 4% in a mixture of these types of places.

2.4 Levels of satisfaction with place of residence

Across the sample, 93% of respondents were either very or fairly satisfied with their local areas as a place to live. When asked what they liked about living in their local area, respondents tended to cite peace and quiet; a slower pace of life; closeness to nature and the landscapes and scenery of rural Wales; and a sense of close community.

Only 4% of respondents stated that they were dissatisfied with their local area. When asked what they disliked about living in the area these respondents pointed to a lack of services, such as shops and community facilities, and also poor public transport provision. On the whole, however, respondents appeared to be happy with their local areas as places to live, illustrated by the 38% of respondents who did not express any dislikes about the area where they lived.

2.5 Length of Residence

As with the previous surveys, the 2010-11 survey provided evidence of both population stability and mobility in rural Wales. Just over a quarter (27%) of respondents had lived in their present property for 21 years or longer and a further 47% for between five and 21 years. The upper age groups were the most stable demographic group, with almost half (47%) of all respondents aged 55 or over residing in their property for 20 years or longer.

However, as shown in Table 2.3, this pattern of stability co-existed alongside considerable population change, with 21% of all respondents stating that they had lived in their property for less than five years. Respondents in the younger age groups, particularly those under 35, were most likely to have moved during the last five years.

Table 2.3 Length of residence by age

	All	16-34	35-54	55+
Under 1 year	2%	9%	2%	1%
1 - 5 years	19%	44%	22%	10%
6 - 10 years	22%	24%	26%	18%
11 - 15 years	14%	9%	18%	13%
16 - 20 years	11%	8%	13%	9%
21 - 25 years	10%	4%	9%	11%
26 - 30 years	7%	1%	5%	10%
31 – 40 years	9%	1%	2%	16%
41+ years	6%	0%	2%	10%

2.6 Inward- and outward-migration

The findings from the survey also highlight significant processes of migration, both in to and out of rural Wales. A significant majority of respondents (87%) stated that they had not always lived in their local area, and of these just over a quarter (26%) had returned to an area where they used to live. Short distance movements were more common than those between regions or across greater distances. For example, 38% had moved to an area that was located less than five miles from their previous place of residence, and a further 25% had moved a distance of between five and 20 miles. A smaller proportion of respondents (15%) had moved from an area located between 20 and 100 miles away, while 23% had moved a distance of more than 100 miles.

Less than half (44%) of migrants had previously lived in a country village or in a property or farm in the countryside. However, 35% had lived in a town and 19% in or around a city, which points to movement from urban to rural areas.

When questioned about their motivations for moving to their current place of residence, a third of respondents cited personal reasons, including moving to set up home with a partner or spouse, leaving the parental home to live on one's own and a desire to be close to family and friends; 26% had moved into their area to find a larger or more suitable property; and 16% cited employment reasons. Other reasons for moving included retirement and a search for a better quality of life (5% and 13% respectively).

Similar to the previous surveys, the 2010-11 survey results highlight a pattern of out-migration from rural Wales. Just over one fifth (22%) of all respondents indicated that a member of their household had moved out during the previous five years. While a significant proportion (43%) had remained in rural Wales, 29% had moved to England and 20% had relocated to another area in Wales. In terms of the demography of out-migrants, the results indicate that the majority (88%) were under the age of 35. The three main reasons cited by respondents for moving out of the household were to attend college or university (29%); to set up home elsewhere (28%); and to find better employment opportunities in a new area (19%). These figures broadly accord with those of the previous surveys, as shown in Table 2.4.

Table 2.4 **Comparison of patterns of outward-migration from rural Wales**

Survey Year	Moved locally	Elsewhere in rural Wales	Elsewhere in Wales	Outside Wales
2004	37%	12%	11%	38%
2007	41%	6%	17%	36%
2010-11	35%	8%	20%	36%

2.7 National Ethnicity and Identity

With regard to ethnicity, 99% of respondents defined themselves as white.

In terms of self-defined national identity, just over half of all respondents (51%) defined themselves as Welsh; 29% defined themselves as British; 16% defined themselves as English; and 4% as something else. Looking in detail at these statistics, there is a correlation between age and self-defined national identity, with younger respondents - those under the age of 35 - most likely to define themselves as Welsh, compared with the other age groups (see Table 2.5 below).

Table 2.5 **National Identity by age**

National Identity	All	16-34	35-54	55+
Welsh	51%	58%	54%	47%
British	29%	27%	28%	30%
English	16%	10%	14%	19%
Other	4%	6%	4%	3%

Interestingly, nearly half of all respondents aged 55 or over identified themselves as British or English, which suggests that perhaps some of these individuals had moved into the area for retirement purposes. As might be expected, respondents who had lived in their local area for longer periods were more likely to identify themselves as Welsh, compared with more recent in-movers.

2.8 The Welsh Language

In terms of Welsh language skills, 15% of all respondents stated that they could speak Welsh fluently. However, if those respondents who could speak the language 'quite well' are included, the proportion of Welsh speakers rises to 24%. These numbers are slightly lower than the figures recorded for both the 2007 and 2004 survey, although the 2010-11 results reveal that a higher proportion of respondents could speak a few sentences or a few words – at 54%, compared with 47% in 2007 and 33% in 2004. Over a fifth (22%) of respondents indicated that they could not speak Welsh; slightly fewer than in the previous surveys.

There is a direct link between Welsh language ability and both length of residence and age (see Table 2.6 and Table 2.7). Just under three in ten (29%) of respondents who had lived in their current property for 21 years or longer were either fluent Welsh speakers or could speak the language quite well, compared with the 20% who had lived in their current home for less than six years. The proportion of those respondents competent in Welsh tended to decrease in the older age categories.

Table 2.6 Welsh language ability by length of residence

	All	5 years or less	6 – 20 years	21 years or more
Fluently	15%	12%	14%	19%
Quite well	9%	8%	9%	10%
Speak a few sentences	21%	22%	21%	18%
Only a few words	33%	33%	33%	32%
Not at all	22%	24%	22%	21%

Table 2.7 Welsh language ability by age

	All	16-34	35-54	55+
Fluently	15%	17%	16%	14%
Quite well	9%	10%	10%	8%
Speak a few sentences	21%	26%	22%	18%
Only a few words	33%	28%	31%	35%
Not at all	22%	18%	20%	25%

In terms of the use of the Welsh language in day-to-day life, 47% indicated that they spoke Welsh most of the time within the home, and 20% stated that they sometimes spoke Welsh at home. In addition, 35% stated that they mostly used the Welsh language in the workplace, and a further 26% that they used Welsh occasionally in work. Figures for Welsh language use by Welsh speakers within the community and with friends and neighbours are provided in Table 2.8.

Table 2.8 The use of the Welsh language by Welsh speakers in rural Wales

	Mostly	Sometimes	Rarely	Never	Not applicable
At home	47%	21%	15%	16%	2%
At work	35%	26%	8%	5%	26%
With friends and neighbours	42%	32%	15%	10%	0%
Within the community	35%	34%	16%	12%	2%

The survey results also highlight notable geographical differences in Welsh language proficiency across rural Wales. Unsurprisingly, the traditional heartlands of rural Wales had a strong representation of fluent Welsh speakers, with the highest proportions found in Gwynedd (49%), Anglesey (35%), Carmarthenshire (25%) and Ceredigion (24%). These proportions increased when those respondents who indicated that they could speak the language quite well were also included. Table 2.9 shows the proportion of fluent Welsh speakers by Local Authority area.

Table 2.9 Proportion of fluent Welsh speakers in Local Authorities surveyed

	Speak Welsh Fluently
All	15%
Carmarthenshire	25%
Ceredigion	24%
Conwy	13%
Denbighshire	14%
Flintshire	10%
Gwynedd	49%
Anglesey	35%
Monmouthshire	1%
Pembrokeshire	6%
Powys	8%
Vale of Glamorgan	2%
Wrexham	5%
Other LA surveyed	5%

Key Findings

- 65% of the households in the survey of rural Wales contained two or fewer members. 24% were single person households.
- Three out of five single person households were living on an income of less than £10,000.
- 49% of respondents owned their home outright.
- Just over a third of respondents had lived in their present property for more than 20 years, while just over a fifth of respondents had lived in their property for less than five years. Long-term residence was more likely in the upper age groups.
- 87% of respondents indicated that they had not always lived in their local areas. Of this figure, 26% had returned to an area where they used to live.
- Over half of respondents (55%) considered themselves Welsh.
- Younger respondents were more likely to speak Welsh and consider themselves Welsh.
- 24% of respondents spoke Welsh, either fluently or quite well.
- 22% of respondents could not speak Welsh.

SECTION 3 LOCAL SOCIAL AND COMMUNITY CONTEXT

3.1 Introduction

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

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

The section is structured around the following themes:

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

3.2 Family and community networks

The survey data point to the existence of close family and community networks amongst rural households: 31% of all respondents stated that they lived within one mile of a close family member; 19% stated that they lived more than one mile but less than five miles from a family member; and 10% more than five miles but less than ten miles. This indicates that a significant majority of respondents (60%) lived within 10 miles of at least one family member. These results are broadly in line with the equivalent figures for the 2007 and 2004 surveys.

Younger respondents were more likely to live close to a family member, with 60% of respondents in the under 35 age group stating that a family member lived less than five miles away, compared with 45% of the 55 and over group. Figures showing the extent of family networks according to each age category are in Table 3.1 below.

The relatively high percentage of respondents in the over 55 age category (28%) who indicated that their family members lived at a distance of 50 miles or more indicates patterns of in-migration within this age group.

Table 3.1 Proximity of family members by age category

	All	16-34	35-54	55+
Less than 1 mile away	31%	41%	33%	27%
More than 1 mile but less than 5 miles away	19%	19%	21%	18%
5 miles or more but less than 10 miles away	10%	10%	10%	11%
10 miles or more but less than 50 miles away	14%	10%	15%	15%
50 miles or more	24%	19%	20%	28%
No other family	1%	1%	0%	1%
Don't know	0%	0%	0%	0%

Respondents who had spent most of their lives in Wales were much more likely to have a local family network, with nearly three out of every five (59%) stating that they lived less than five miles from a family member. Conversely, just over half of those respondents who had spent most of their lives outside Wales stated that their nearest family member lived at a distance of 50 miles or more. Similarly, length of residence appears to influence levels of family attachments, with nearly three out of every five respondents (57%) who had lived in their current property for more than 20 years stating that a family member lived less than five miles away.

The survey findings show national identity and Welsh language skills to be key factors in influencing the degree of local family networks in rural Wales. Nearly two-thirds (64%) of respondents who considered themselves to be Welsh lived less than five miles away from a family member, which is a considerably greater proportion than for the other nationalities. Similarly, those respondents who spoke Welsh, either fluently or quite well, were less likely to live a considerable distance away from close family, with 61% of these respondents stating that they lived within five miles of another family member. The corresponding figure for those who spoke no Welsh at all was 45%. In addition, 35% of respondents who spoke no Welsh at all had no family members living within a 50 mile radius.

Looking in greater detail at the extent of family and community networks, the findings indicate that half of all respondents had between one and 10 close friends or family members living within five miles of their home, and a further 38% had more than 10 close friends or family members living nearby. The extent of family and community networks did not vary significantly with age, although as previously, those respondents who had spent most of their life living in Wales, had lived in their current property for the longest length of time, and spoke Welsh either fluently or quite well, had the widest or strongest family and community networks.

Similar to previous surveys, the 2010-11 findings illustrate the extent of community interaction within rural Wales, with 49% speaking to their neighbours on most days, and 37% indicating that they did so once or twice a week, which points to strong levels of community interaction within rural Wales. Variations are apparent across a number of categories, most notably age, income and type of settlement. Firstly, respondents in the upper age categories (those aged 55 or over) were much more likely to speak to their neighbours on a daily basis compared with younger groups.

Secondly, in terms of income, lower income groups were more likely to interact with their neighbours on a daily basis compared with those in the higher income categories. However, when figures concerning weekly interaction with neighbours are included, the figures even-out across the income categories. Table 3.2 shows these results.

Table 3.2 Interaction with neighbours by income categories

Speak to neighbours…	All	Less than £10,000 pa	£10,000 - £20,999	£21,000 - £30,999	£31,000 - £51,999	£52,000 or more
On most days	49%	54%	52%	44%	45%	40%
Once or twice a week	37%	29%	33%	41%	41%	45%
Once or twice a month	9%	9%	8%	9%	10%	9%
Less often than once a month	4%	5%	3%	3%	3%	4%
Never	2%	2%	3%	2%	1%	2%
Don't know	0%	1%	0%	0%	0%	0%

Thirdly, further examination of the characteristics of neighbourly interaction reveals variation according to the type of settlement in which the respondents lived. For example, 53% of all respondents who lived in a country village stated that they spoke to their neighbours on most days, compared with 48% for those who lived in a town or city and 34% of respondents who lived in a property or farm in the open countryside.

3.3 Involvement in local activities and organisations

The survey examined in detail the extent of the membership of local and national organisations in rural Wales. It revealed that 56% of all respondents were involved in activities organised by local and national groups and societies. For example, 20% indicated that they held membership to a sports club; 7% were involved with activities relating to the local church; and 6% were involved with a local voluntary or charity group.

Closer examination of the results reveals that involvement in certain activities, such as those linked to local sports clubs or centres, tended to increase with levels of income. Just over a third (35%) of respondents in households with an annual income of £52,000 or more indicated that they regularly participated in such activities, compared with 9% of those respondents with annual household incomes of less than £10,000.

3.4 Civil engagement

Table 3.3 below illustrates the extent of political engagement in rural Wales during the previous twelve months: 30% of respondents had attended a public meeting; 40% had signed a petition; a fifth had contacted their local Councillor and a further 18% had contacted their Member of Parliament or Assembly Member. These figures are similar to the results of the previous surveys. This suggests that the level of political engagement in rural Wales was approximately the same during the six years since the 2004 survey.

Table 3.3 Involvement in civil and political activities in rural Wales within the past 12 months

Activity during the last 12 months	% of all respondents
Attended a public meeting	30%
Contacted your MP or Assembly Member	18%
Signed a petition	40%
Contacted your councillor	20%
Provided care for neighbours or friends	45%
Completed a survey from a Council or community group	25%
Participated in a protest or street demonstration	3%
None of these	26%
Don't know	0%

The survey results also indicate that care and support activities are important elements of people's lives in rural Wales. Providing care attracted the highest response rate, with 45% of all respondents surveyed stating they had provided care for neighbours and friends during the last 12 months. Closer examination of the data collected on care and support activities in rural Wales highlights a number of patterns that are worthy of mention.

Firstly, female respondents were more likely to be involved in the provision of care and support services, with just under half (47%) indicating that they were involved in such activities, compared with 42% for male respondents. However, it is important to note that the proportion of male respondents engaged in care and support activities increased slightly from 39% in 2007.

Secondly, respondents in the upper age categories were more likely to provide care and support to neighbours or friends, with 46% of those over 55 stating that they regularly did this, compared with 45% for those respondents aged between 34 and 55 and 39% of those aged under 35. These figures are slightly higher than the equivalent results for the 2007 survey.

Thirdly, it is clear that the length of time spent living within a community or area appears to influence the likelihood of rural respondents providing care and support to neighbours or friends: 46% of respondents who had resided in their property for 20 years or longer were engaged in such activities, as were 46% of those who had spent between six and 20 years in their current home, compared with 39% of those who had lived in their property for less than six years. These figures are broadly in line with the figures for the previous surveys.

Fourthly, length of residence and Welsh language skills appeared to be key factors in the provision of care and support within rural communities. The survey results reveal that just under half (49%) of all respondents who spoke Welsh, either fluently or quite well, and a slightly smaller proportion of 46% of respondents who had lived in their local area for more than 21 years indicated that they provided care and support services for neighbours and friends within their community.

3.5 Involvement in voluntary work

The survey results reveal that 39% of respondents had carried out some form of voluntary work for a local charity or organisation during the previous 12 months. This is slightly higher than the equivalent figures recorded for the 2007 survey, in which 32% of respondents responded positively. The results show no differentiation in responses according to gender and age. However, those respondents in the upper income categories were more likely to be involved in such activities. As with other forms of social and political activities discussed earlier in this section, analysis reveals a positive relationship between the Welsh language skills of respondents in rural Wales and their involvement in voluntary work: 45% of respondents who spoke Welsh either fluently or quite well indicated that they had undertaken voluntary work over the previous 12 months, which was slightly higher than the proportion of those who spoke only a few words or sentences (40%) and those who spoke no Welsh at all (32%).

With regard to the types of voluntary work undertaken by respondents during the previous 12 months, the most frequently cited responses were fundraising activities, such as organising community events (26%), followed by fundraising events for a named charity or organisation (13%). The remaining responses included activities relating to local youth groups (7%) and the local Church (7%), and volunteering in a local charity shop (6%).

3.6 Social Capital and local community

Other aspects of social capital revealed by the survey include the features of social organisations, such as community and social networks, and the levels of community trust, which facilitate community co-ordination and co-operation.

(i) Community Feeling

The vast majority of respondents (77%) surveyed agreed that there was a sense of community in their local area. Looking in detail at the responses provided, a strong sense of community feeling was noted by the majority of respondents, regardless of age. For example, at least 72% of respondents in each age category agreed that there was a strong sense of community in their local area. A sense of community was also noted by high proportions of recent movers and long-established respondents. For example, 78% of respondents who had lived in their local area for 21 years or longer; 77% who had resided in their property for between five and 21 years; and 76% who had lived in their property for less than six years agreed that there was a sense of community in their local area.

(ii) Attitudes to community belonging

Respondents were asked to specify to what extent they considered themselves to be a member of the local community. They were asked to rate their attitudes by choosing one of five categories, ranging from positive to negative: 'agree strongly', 'tend to agree', 'neither agree nor disagree', 'tend to disagree', and 'disagree strongly'.

Just over a third (37%) of respondents strongly agreed when questioned, and a further 41% tended to agree, providing an overwhelmingly positive response. Feelings of attachment to the local community appeared to be strongest amongst long-term respondents who had lived in the same property for more than 20 years, with just under half (46%) of these respondents agreeing strongly that they considered themselves members of the local community. In contrast, only 28% of respondents who had lived in their property for less than six years agreed strongly with the statement. However, if the 'agree strongly' and 'tend to agree' categories are combined, the vast majority of in-movers agreed that they felt part of their local community.

The results show that the ability to speak Welsh, be that fluently or quite well, had some influence on respondents' attachment to the local community. A significant majority of Welsh-speaking respondents (85%) agreed that they were an active member of the local community. The proportion responding positively in this way was slightly lower amongst those who spoke only a few Welsh words or sentences (78%) and those who spoke no Welsh at all (72%). Those respondents who spoke no Welsh at all were more likely to respond negatively when questioned about their role as members of the local community, with 13% tending either to disagree or disagreeing strongly. However, when respondents were questioned on the issue of whether the ability to speak Welsh was important in enabling them to fully participate in the area where they lived 29% agreed with the statement, while a significant proportion (61%) felt that it was not a significant issue.

Overall, those respondents who classified themselves as 'Welsh' were more likely to consider themselves as part of the local community, with 81% of respondents in this category responding positively when questioned. This compared with respondents who classified themselves as 'British' (76%), 'English' (73%) or 'None of these' (78%).

Feelings of attachment to the local community were highest among the older age groups, with 44% of all respondents aged 55 or over agreeing strongly that they felt a part of their local community. This attachment to community decreased in younger groups, with 31% of respondents aged between 35-54 and 22% of respondents under the age of 35 agreeing strongly.

(iii) Community Solidarity

Respondents were asked to indicate the extent to which they considered that people in their local community looked out for one another. This question received an overwhelmingly positive response: 83% of all respondents agreed that people in their local community looked out for one another. Only 9% disagreed. Further analysis reveals a tendency for agreement to increase with age.

(iv) Perceptions of isolation

Respondents were asked to respond to the statement 'It can feel isolated living where I do'. Overall, 21% respondents agreed with this statement.

In terms of age, 28% of all respondents under the age of 35 years agreed that they sometimes felt isolated in their area. The corresponding results for respondents aged 35-64 years, and 65 years or over were 29% and 23% respectively.

(v) Perceptions of safety

The survey results suggest that rural Wales was viewed as a relatively safe place to live, with strong community relations. Almost all (95%) of respondents felt safe in their community and 86% of respondents disagreed with the statement 'The rate of crime is high in this area'.

Key Findings

- Half of all households lived less than five miles from a family member.
- Welsh identity and Welsh language skills were key factors influencing the extent of family networks.64% who defined themselves as Welsh and 64% who spoke Welsh fluently or quite well lived less than five miles from a family member.
- 87% of respondents indicated they spoke to their neighbours at least once or twice a week, with the majority of respondents doing so on most days. Those respondents in the younger age groups, on higher income categories, and living in a property or farm in the open countryside were less likely to do so.
- 64% of respondents were involved in activities organised by local and national groups and societies.
- Nearly two out of every five respondents indicated that they had engaged in some form of voluntary work for a local charity or organisation during the previous twelve months. Engagement in voluntary work was more likely among respondents in the higher income categories.
- 45% of respondents had provided care and support services for neighbours or friends during the last 12 months.
- 78% considered themselves members of the local community. Respondents who defined themselves as Welsh were more likely to consider themselves part of the local community.
- 85% either strongly agreed or tended to agree that they were an active member of the local community.
- 95% felt safe living in their community. Respondents under 35 were less likely to feel safe living in their community.
- 21% of respondents felt isolated living in their local area. Such feelings of isolation appeared to decrease with age.

4.1 Introduction

Arguably, the idea of the rural idyll, with its associations of relative affluence and strong community ties, has tended to hide issues of poverty and social exclusion in rural areas. This section explores these issues in rural Wales by examining the perceptions of the respondents in terms of welfare in their communities. The section covers the following themes:

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

4.2 Household income and benefit receipt

Household income is a sensitive area and households were offered income ranges and asked to indicate the appropriate range rather than a specific figure. Of the 4,062 respondents, 22% either stated that they did not know their household income or refused to answer the question. Table 4.1 shows the proportions in each income range of the 3,169 householders who provided this information.

Table 4.1: Annual Household Income

	Percentage of households
Less than £5,000 pa	3%
£5,000 - £9,999	14%
£10,000 - £14,999	17%
£15,500 - £20,999	14%
£21,000 - £30,999	23%
£31,000 - £51,999	17%
£52,000 or more	12%

Closer examination of the household income data confirms the prevalence of low incomes in rural areas of Wales. Nearly half (48%) of all households had an annual income of less than £21,000, 17% of which earned less than £10,000 per annum. Of the remaining households, 40% had an annual income of between £21,000 and £51,999, and 12% of households had annual incomes of £52,000 or more.

With regard to the geographical distribution of low incomes in rural Wales, Table 4.2 shows the proportions of respondents with an annual income of less than £10,000 in each local authority.

Table 4.2 – Proportion of households with annual income under £10,000 by Local Authority

Local Authority	COUNT	% of all interviews
Isle of Anglesey	44	17%
Carmarthenshire	37	14%
Ceredigion	34	14%
Conwy	53	13%
Denbighshire	45	14%
Gwynedd	54	14%
Monmouthshire	8	5%
Pembrokeshire	57	13%
Powys	61	14%
Flintshire	25	13%
Wrexham	21	11%
Vale of Glamorgan	7	5%
Additional LA*	84	14%
SURVEY TOTAL	**528**	**13%**

(* Additional LA = Bridgend, Caerphilly, Merthyr Tydfil, Neath Port Talbot and Swansea)

Table 4.2 highlights the smaller proportions (5%) of low income households in Monmouth and the Vale of Glamorgan. The proportions of households with low incomes in the remaining local authorities were in the range 11% -14%, except for the Isle of Anglesey, which recorded 17%.

The sources of household income are paid work, unearned income, pensions and benefits. In terms of unearned income, Table 4.3 shows the proportions of households with sources of unearned income.

Table 4.3 Sources of unearned income

Income source	Proportion of total households
Income from property	8%
Interest from Building Society and/or Bank Savings Account	38%
Dividends from shares	22%
Other investment income	14%
None of these	38%

Respondents living in the 2119 households with people aged 55 years or over were asked if they were in receipt of a private, stakeholder or occupational pension: 62% of these households contained people in receipt of a pension. This represents 32% of the total survey sample.

In terms of benefits, Table 4.4 shows the proportions of the households surveyed in receipt of a range of benefits. Data from the 2007 survey are shown for comparison.

Table 4.4 reveals increases in the proportions of households receiving all benefits, except Income Support. The largest increases were in the proportions of households receiving Disability Living Allowance or Attendance Allowance, Council Tax Benefit, Housing Benefit or Local Housing Allowance, Education Maintenance Allowance, and Winter Fuel Allowance.

Table 4.4 Households receiving benefits

Benefits or Tax Credits	2007 % of households	2010-11 % of households
Income Support	5%	4%
Jobseeker's Allowance	1%	2%
Incapacity Benefit	7%	8%
Disability Living Allowance or Attendance Allowance	10%	13%
Working Tax Credit	9%	10%
Council Tax Benefit	9%	12%
Housing Benefit or Local Housing Allowance	4%	6%
Training Allowance	-	0.3%
Education Maintenance Allowance	1%	3%
Winter Fuel Payments	19%	38%
Carers Allowance	3%	4%
Others	1%	13%
None of these	54%	36%

The notable increase in the number of respondents claiming Winter Fuel Allowance, from 19% in 2007 to 38% in 2010/11, may be attributed to the increase in the proportion of people aged over 60 in rural Wales, from 28% in 2007 to 30% in 2010 - as noted in the ONS mid-year population estimates. It may also be attributed to the fact that the recent hard winters had resulted in an increase of applications for the allowance.

Respondents were also asked if income levels in their locality had improved or worsened over the past few years. The largest proportion (42%) felt that incomes had not changed. Of those who felt that incomes had worsened, 23% felt that they had worsened 'a little' and 16% felt that incomes had worsened 'a lot'. Only 5% felt that incomes in their locality had improved during recent years.

Similar to income, household savings are a sensitive subject. Consequently, when asked for an estimate of their household savings, respondents were offered ranges rather than specific amounts. Table 4.5 shows the savings data. An interesting point to note is that a third of households had savings of less than £1,000.

Table 4.5 Household Savings (excluding value of property)

Amount of Household Savings	Proportion of households
Less than £1,000	33%
Between £1,000 and £1,999	8%
Between £2,000 and £4,999	12%
Between £5,000 and £9,999	10%
Between £10,000 and £19,999	11%
Between £20,000 and £49,999	11%
Between £50,000 and £99,999	6%
Over £100,000	8%

4.3 Household outgoings

The principal outgoing for most households, with the exception of those who owned their property outright, tended to be mortgage or rent payments. As noted earlier in Section 2, 49% of the households surveyed owned their property outright. For those households that were paying a mortgage or rent, Table 4.6 provides an indication of the amounts paid per month.

Table 4.6 Mortgage or Rent per month

Monthly Mortgage / Rental payments	Proportion of households
Nothing	7%
Less than £50	3%
£50 – £99	5%
£100 – £199	8%
£200 – £299	15%
£300 – £399	17%
£400 – £499	14%
£500 – £699	17%
£700 – £999	9%
£1,000 or more	5%

4.4 General Well-being and Welfare

Respondents were asked a series of questions in order to understand both their financial situation and how it related to their general welfare. To gauge respondents' feelings concerning the adequacy, or otherwise, of their household income, they were provided with a series of statements (shown in Table 4.7) and asked which corresponded closest to their current situation.

Table 4.7 Adequacy of income

Statement	Proportion of respondents
Living comfortably on present income	34%
Coping on present income	48%
Finding it difficult on present income	13%
Finding it very difficult on present income	4%
Don't know or Refused	1%

Further analysis shows that 40% of respondents in households with an annual income of less than £10,000 stated that they found it 'difficult or very difficult'.

When asked how much of a problem it would be if the respondent had to find £100 to meet an unexpected expense, 3% stated that it would be impossible to find and a further 22% indicated that they would experience difficulty, while the majority of respondents (75%) felt that they would find it fairly easily. These responses varied according to the level of household income, with 47% of households with an annual income of less than £10,000 finding it 'impossible' or 'difficult to find such an amount.

Respondents were then presented with two scenarios relating to the provision of 'informal support' and asked to select the most appropriate

Scenario 1: You are sick and unable to leave your bed. Is there anyone you could ask for help and if so who?

Scenario 2: You need to borrow some money for a few days to help you out of financial difficulty. Is there anyone you could ask for help and if so who?

Table 4.8 shows the responses for each statement.

Table 4.8 The availability of informal support

Potential helper	Scenario 1: You are sick and unable to leave your bed	Scenario 2: You need to borrow money for a few days
No one to ask for help	3%	11%
Spouse or partner	48%	18%
Other household member	14%	8%
Relative outside of household	42%	53%
Friend	23%	15%
Neighbour	16%	2%
Work colleague	2%	1%
Voluntary or other organization	1%	1%
Other	2%	4%
Would prefer not to ask for help	<1%	6%
Don't know	1%	3%

These data display a marked difference between the two scenarios. They show that people in the survey perceived difficulty in asking for financial assistance. In contrast, people had relatively little difficulty in asking for help in other situations, for example, when confronted with an illness. Spouses, partners, relatives, neighbours and friends were the most common sources of help.

4.5 Health, Illness and Disability

The health of rural residents represents an important aspect of their general welfare and well-being. Respondents were asked if they, or another member of their household, suffered a long-standing illness, disability or infirmity that had either troubled them over a period of time, or had the potential to affect them over a period of time. Just over a quarter of the survey sample (26%) indicated that they had a long-standing illness, disability or infirmity, and 14% noted that another member of their household suffered from a long-standing illness, disability or infirmity.

There appeared to be some notable correlations between long-standing illness, disability or infirmity and factors relating to age, income and social class. In terms of age, 35% of respondents aged 55 years or over had a long-standing illness, disability or infirmity. With regard to income, 46% of respondents in households with an annual household income of less than £10,000 had a long-standing illness, disability or infirmity. In relation to social class, 38% of respondents in social class DE had a long-standing illness, disability or infirmity.

4.6 Broader issues of welfare and quality of life

While health and income are considered as the principal determinants of welfare quality, a number of additional factors such as personal possessions (i.e. television, telephones, the Internet and Broadband) are increasingly viewed as desirable, if not essential, for modern living.

A substantial 81% of the survey sample had a personal computer with a Broadband connection within the property. However, of the 784 households who indicated that they did not have access to Broadband within their property, 39% had an annual income of less than £9,999; 24% had an annual income of between £10,000 and £20,999; 33% were assigned to Social Class DE; and 30% were classified as 'economically inactive'.

Additionally, 9% of these households had a personal computer with a Dial-up Internet connection; 13% had a personal computer without an Internet connection; and 78% did not have a computer. Households in the lower income categories were more likely to indicate that they did not own a computer.

With regard to Internet access outside the household property, 49% of the total survey sample had Internet access at work or in a café. However, it is important to note that Internet access is not necessarily limited to a computer; 47% of the total survey sample had a mobile telephone or similar device which enabled access to the Internet. A significant majority of households (81%) also owned a mobile telephone.

Digital television coverage was widespread with 93% of the total survey sample having cable, satellite, Freeview or other digital television in their household property.

4.7 Perceptions of other people's welfare and quality of life

Respondents were asked their opinions of how other people in their area were faring. When questioned about whether there were people in their local area living in poverty, just over half of all households (52%) agreed – an increase from the figure recorded in the 2007 survey (43%). Table 4.9 compares the 2007 and 2010-11 data by local authority area.

Table 4.9 Perceptions of poverty by Local Area Authority

Local Authority Area	2007 (YES)	2010-11 (YES)
Isle of Anglesey	45%	53%
Gwynedd	51%	56%
Conwy	46%	56%
Denbighshire	45%	56%
Flintshire	36%	45%
Wrexham	34%	43%
Powys	39%	48%
Ceredigion	43%	53%
Pembrokeshire	43%	54%
Carmarthenshire	45%	48%
The Vale of Glamorgan	25%	39%
Monmouthshire	41%	42%

Across all local authorities, perceptions that people living in the local area were in poverty were consistently higher in 2010-11 than in 2007. The smallest increase was in Monmouthshire, the most prosperous part of Wales, which witnessed an increase of one percentage point. Other local authority areas had far larger increases ranging from four percentage points in Carmarthenshire to 14 percentage points in the Vale of Glamorgan. While Gwynedd had a relatively small increase from 51% to 56%, it already had the highest rate of poverty perception in 2007. In 2010-11, it again recorded the highest level, together with Conwy and Denbighshire.

Looking in greater detail at the responses, it appears that older people were less likely to perceive poverty in their local area. 44% of those aged over 55 years acknowledged the presence of poverty in their local area, compared with 60% for the 35 -54 age group and 62% for the 16-34 age group. Perceptions of poverty also tended to be higher among respondents who had lived in their area for the shortest period: 44% of those who had lived in the area for more than 20 years agreed that there were people living in poverty in their area, compared with those who had lived in the area for less than five years (56%) and between six and 20 years (55%).

As a follow-on question, respondents were shown a list of social groups and were asked to identify which groups were most likely to be living in poverty in their local area. The most prominent responses are shown in Table 4.10.

Table 4.10 Types of people perceived to be in poverty

Group	Perceived by (Base: 2,102)
Unemployed people	46%
Older people	42%
Single parents	17%
Young people	15%
People from low income families	15%
Families with young children	13%
People with physical disabilities	6%

Key Findings

- 42% of respondents felt that incomes had not changed in their local area over the past five years, while 39% felt that income level had worsened.
- Of the 3,169 households who provided information about their income, 48% of households had an annual income of less than £21,000, 17% of which had an annual income of less than £10,000.
- 62% of households containing people aged 55 years or over were in receipt of a private, stakeholder or occupational pension.
- The survey results show an increase in the proportion of respondents receiving benefits compared with 2007.
- 40% of respondents in households with an annual income of less than £10,000 indicated they found it 'difficult' or 'very difficult' on their present income.
- 22% of respondents would find it difficult to obtain £100 to meet an unexpected expense, and 3% would find it impossible.
- 33% of households had savings of less than £1,000.
- 26% of respondents had a long-standing illness, disability or infirmity.
- 81% of households had a computer with a broadband connection.
- Households without broadband tended to have low incomes, be categorised as social class DE, and have members that were economically inactive.
- 47% had a mobile telephone or similar device with access to the internet.
- 52% of respondents thought that there were people living in their area in poverty – this compares with 43% in 2007.

5.1 Introduction

In recent years, many local communities in rural Wales have lost services such as shops, public houses, schools, a permanent police presence, and their post office. Relative deficiency in service provision may be compounded in rural areas by distance and perceived remoteness, both physical and administrative, from service centres. This section examines perceptions of, and access to, services in rural areas.

5.2 Access to services in rural Wales

The survey investigated whether households in rural Wales experienced any difficulties in accessing key services, including health services such as a hospital, GP surgery or dentist, food shops, leisure facilities and so on. Half of all respondents indicated that their household did not experience any difficulties in terms of accessing these services within their area.

The services most likely to cause problems in terms of access were leisure services such as cinemas, cited by just under a quarter (23%) of all respondents; police stations (16%); hospitals (15%); and dental surgeries (14%). Concerns regarding access to other local services such as banks or building societies, social clubs, petrol stations and free cash points were also raised by smaller proportions of respondents. For example, 12% experienced problems accessing a bank or building society; 10% had difficulties accessing a leisure centre; and 9% cited problems in terms of reaching a social club or petrol station.

The results also suggest that within rural Wales, such difficulties were not uniformly experienced – issues of access affected some groups and areas more than others. Closer examination of the results concerning general access to key health and retail services in rural Wales, such as hospitals, GP and dental surgeries, supermarkets and petrol stations, reveals that low income households were much more likely to experience difficulties in accessing these range of services. For example, 20% of respondents with an annual household income of less than £21,000 had experienced difficulties in reaching their nearest hospital, compared with 12% of those respondents with annual household incomes of more than £52,000 per annum. The figures for GP surgeries, dental practices, supermarkets and petrol stations display a similar pattern.

In relation to geography, those respondents who lived either in a village or in a property in the open countryside were more likely to report difficulties in accessing services than those from larger rural settlements. The most frequently cited problems experienced by these types of respondents were those concerning access to police stations, hospitals, dental surgeries and banks and building societies. Some significant geographical differences, particularly in terms of access to health services such as hospitals and dental surgeries, are also apparent when the figures are disaggregated by local authority area. For example, difficulties in accessing hospital services were more prevalent in the most rural areas of Wales, with 32% of respondents in Powys reporting such problems, followed by Gwynedd (29%) and Ceredigion (15%), compared with more accessible areas such as Flintshire (10%), the Vale of Glamorgan (10%) and Monmouthshire (10%).

These results appear to support the findings of the Deep Rural research undertaken by the WRO in 2008-9, which found that recent closures of local hospitals, together with reductions in services and opening hours at hospitals in certain parts of rural Wales, posed a major health service problem for respondents. Respondents provided examples of long journeys to their nearest hospital, and in Powys respondents had to travel to major hospitals in England such as Shrewsbury and Hereford for treatment.

The survey also examined the perceptions held by householders in rural Wales concerning the provision of services in their local area and their assessments of those services. Respondents were required to rate the provision of a range of services in their local area using one of three options: 'good', 'fair' or 'poor'. Included in the list of services were NHS services (such as GP surgeries or hospitals), public transport, food shops post offices, banks and building societies, community facilities, leisure facilities, schools and policing. Table 5.1 summarises the responses according to the different categories of services.

Table 5.1 Ratings of Public Services

Total 4071	NHS	Policing	Fire Service	Public Transport	Schools	Food shops	Post Office	Banks & building societies	Community centre	Leisure facilities
Good	71%	44%	71%	40%	73%	70%	77%	67%	57%	56%
Fair	23%	38%	13%	30%	13%	22%	15%	20%	18%	24%
Poor	5%	12%	1%	23%	2%	7%	5%	9%	5%	11%
No answer	1%	6%	15%	7%	12%	1%	3%	4%	20%	9%

Over two-thirds of all respondents felt that the standard of post office services, schools, the fire service, NHS services, food shops, and banks and building societies was good in their area. Public transport and policing services received the lowest positive rating, at 40% and 44% respectively. These findings are similar to those from the previous surveys.

5.3 Public Transport

Other WRO studies indicate that there are perceived issues with public transport in rural Wales. Table 5.1 above shows that public transport continued to receive relatively poor approval ratings. Other questions and cross-tabulations of the 2010-11 household survey data enable further analysis. Table 5.2 shows how people living in different types of place in rural Wales rated public transport. The results from the 2007 survey are shown for comparison.

Table 5.2 Perceptions of Public Transport provision by type of area

Rating	Town or City		Country Village		Farm or property in the Countryside		Mixture (combination of area types)	
	2007	2010-11	2007	2010-11	2007	2010-11	2007	2010-11
Good	45%	52%	33%	39%	17%	14%	35%	37%
Fair	26%	28%	29%	31%	23%	31%	29%	31%
Poor	16%	14%	29%	25%	44%	42%	31%	25%
No answer	12%	6%	10%	5%	17%	13%	6%	7%

As can be seen from the table, the proportion of respondents who rated public transport as 'good' increased between 2007 and 2010-11 in all four spatial categories, with the exception of those who lived in a farm or property in the countryside. The number of respondents who rated public transport as 'poor' decreased in all categories during the same time period. However, it is important to note that poor perceptions of public transport provision remained relatively high among those respondents who lived in a country village or in a farm or property in the countryside.

Respondents were also asked whether they considered that other people living in their locality experienced problems relating to the availability of public transport. Overall, 28% of the sample felt that people in their area did not face any difficulties in terms of the availability of public transport, while a quarter indicated that either 'all' or 'most' people faced such difficulties. In addition, a further 42% thought that some people faced problems. These overall results are shown at Table 5.3 below.

Place of residence appeared to have an important bearing on rural residents' perceptions of the provision of public transport in their area and how it impacted on people living in their area. Table 5.3 presents responses according to the type of area in which residents lived. The results show that people living in towns in rural Wales perceived fewer problems with public transport than those living in villages or in the open countryside. Indeed, 41% of respondents who lived in a farm or a property in the open countryside perceived that 'all' or 'most' people in their local area experienced problems with the availability of public transport.

Table 5.3 Perceptions of local people experiencing difficulties relating to the availability of public transport by type of area

Proportion of local people experiencing difficulties	Overall	Town or City	Country Village	Farm or property in the Countryside	Mixture
All	8%	5%	9%	16%	9%
Most	17%	12%	18%	25%	18%
Some	42%	43%	43%	40%	36%
None	28%	35%	28%	12%	25%
Don't know	5%	5%	2%	7%	12%

Key Findings

- Low income households were more likely to experience difficulties in accessing key health and retail services.
- Respondents who lived in a village or in a property in open countryside were more likely to report difficulties in accessing services than those located in larger rural settlements.
- The highest proportions of respondents that reported difficulties in accessing hospitals services were in Powys (32%), Gwynedd (29%) and Ceredigion (15%).
- Overall, respondents were fairly happy with the provision of services in their area. There were however concerns relating to the provision of public transport and policing.
- A quarter of respondents felt that either ‘all’ or ‘most’ people in their local area faced problems relating to the availability of public transport.
- 23% of respondents cited problems relating to access to leisure facilities.

6.1 Introduction

To a great extent the observations in the 2007 WRO Household report concerning the changing economy of rural Wales still apply. While traditional rural employment sectors such as agriculture and forestry retain importance as shapers of the landscape, farmers have had to move towards multi-functionalism in order to compensate for the decline in importance of agriculture and to take advantage of the opportunities afforded by the increasing importance of consumption-based activities such as tourism, sports and leisure. However, since the 2007 WRO Household survey rural Wales, together with the remainder of the UK, has been affected by a recession.

Other WRO work, such as the 2010 Business survey, has highlighted the effects of the recession since 2008. The 2010-11 Household survey posed a series of questions designed to explore the economy of rural Wales, in terms of employment and characteristics of the workforce, and the perceptions of residents about their local economy. The section is arranged around the following themes:

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

6.2 Employment status

The 4,062 respondents were offered a range of categories and asked to nominate their employment status by choosing the category that corresponded to their existing circumstances. Table 6.1 shows the proportions of the sample in each employment category. In addition, the proportions in each category are broken down by age, gender, income and social class.

The results presented in the table show positive correlations between full-time employment and income, and between income and social class. Another point to note is that a smaller proportion of respondents in Social Class DE were in employment compared with the other categories of social class, while a significantly larger proportion of respondents in Social Class DE were classified as 'long-term sick or disabled'. As would be expected, a higher proportion of respondents age 16-34 (14%) were in full-time education compared with the other categories, which ranged between 1% and 2%.

6.3 Changes in employment status 2007 - 2010/11

Looking closely at the employment data for the overall sample, there appeared to be little change between 2007 and 2010. The only employment status type that exhibited a change of more than two percentage points was the 'retirement' category, which increased by three percentage points. In terms of gender, the proportion of males in full-time employment decreased, while females in full-time employment increased. There was also a slight change in the number of respondents classified as 'unemployed'. For example, the number of respondents classified as 'unemployed' in the 16-34 age group increased by two percentage points, while the number of unemployed respondents in Social Class DE increased by four percentage points.

Table 6.1 Employment status of all respondents by Gender, Age, Income and Social Class.

	Overall	Gender		Age			Annual Income					Social Class			
		Male	*Female*	*16-34*	*35 - 54*	*55+*	*Less than £10,000*	*£10K - £20,999*	*£21,000 - £30,999*	*£31,000 - £51,999*	*Over £52,000*	*AB*	*C1*	*C2*	*DE*
Count	**4,062**	**1,889**	**2,173**	**527**	**1,440**	**2,089**	**528**	**998**	**714**	**538**	**370**	**1,319**	**1,228**	**697**	**759**
Full Time	35%	40%	30%	50%	57%	15%	8%	26%	44%	58%	67%	42%	39%	32%	19%
Part Time	12%	5%	17%	14%	15%	9%	10%	14%	12%	11%	9%	10%	13%	14%	11%
Self-employed	8%	12%	5%	5%	11%	7%	5%	9%	8%	9%	10%	6%	9%	14%	5%
Govt Training	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Full Time Education	2%	2%	2%	14%	-	-	2%	1%	2%	1%	-	2%	2%	2%	2%
Unemployed	2%	3%	2%	6%	2%	2%	8%	2%	1%	1%	1%	1%	1%	3%	6%
Long term sick/disabled	3%	3%	3%	2%	5%	2%	8%	5%	1%	-	1%	1%	1%	4%	9%
Retired	33%	33%	33%	-	2%	63%	52%	37%	29%	16%	10%	35%	32%	26%	39%
Looking after home	3%	-	6%	6%	5%	1%	4%	4%	3%	2%	3%	3%	2%	4%	5%
Maternity leave	-	-	1%	2%	-	-	-	-	-	1%	-	-	-	-	-
Doing something else	1%	1%	1%	1%	1%	1%	2%	1%	-	-	-	1%	-	1%	3%

Table 6.2 Respondents and other household members over 16 years and eligible for employment

	Count	Number retired from work
Main respondents	4,062	1,348
Other household members	4,158	851
Total	**8,220**	**2,199**
Total potentially eligible for employment: Respondents + Other household members - Total Retired = **6,021**		

The structure of the questionnaire enabled data to be collected on the employment status of up to five other household members aged over 16 years. For the 2010-11 survey, information was gathered on a total of 8,220 people; this included 4,062 main respondents and 4,158 other household members. Respondents and other household members of retirement age were deducted from this figure in order to determine the total number of respondents and household members eligible for employment. A breakdown of these figures is shown in Table 6.2.

Table 6.3 shows the employment status of the 6,021 respondents and household members eligible for employment.

Table 6.3 Employment status for all persons (respondents and other household members) over 16 years, excluding retirees.

	Count: 6,021	Proportion
Full Time	3,008	50%
Part Time	929	15%
Self-employed	623	10%
Govt Training	12	-
Full Time Education	602	10%
Unemployed	229	4%
Long term sick/disabled	241	4%
Looking after home	289	5%
Maternity leave	14	-
Doing something else	68	1%
Don’t know	6	-

While 55% of the total respondents were in paid work (Table 6.1), a further 11% were not working and a third of respondents were retired.

Table 6.3 excludes the category ‘Retired’. However, just as there was an increase in the proportion of retired survey respondents – from 30% in 2007 to 33% in 2010 (Table 6.1) –

there was an increase in the proportion of 'retired' when all people in responding households were taken into account. The proportions were 25% in 2007 and 27% in 2010 (Table 6.2).

6.4 Economic Inactivity

The term 'economically inactive' applies to people who are neither in employment nor seeking and available for work. The economically inactive population falls into four distinct categories: individuals attending educational institutions; the retired; individuals engaged in family duties; and other economically inactive persons.

The proportion of the 8,220 people in the responding households who qualified as 'economically inactive' was 42% - this compared to 30% in the 2007.

6.5 Employment history

Respondents who were not working at the time of the survey were asked whether or not they had ever been in employment. They were also asked whether or not any other household members who were not currently in employment had ever had a job.

The results indicate that 1,847 respondents were not in employment at the time of the survey, plus a further 1,813 other household members. Accordingly, of the 8,220 people surveyed, a total of 3,660 (45%) were not working at the time the survey was carried out. The vast majority (90%) of those individuals indicated that they had been in paid employment at some point in time.

6.6 Rural employment

Across some employment categories there appeared to be some parity between ONS Labour Force Survey (2010-2011) data for the whole of Wales and the WRO household survey data for 2010-11. As an example, the figures for individuals in self-employment (7%); those looking after the home (4%); and the proportion in full-time employment (38%) were the same for both data sets. There was, however, a slight difference in the figures for individuals in employment - 54% for the whole of Wales and 56% for the WRO rural sample.

Other notable differences were in part-time employment, which was marginally higher for the whole of Wales (15%) compared to the WRO survey (11%); those unemployed people who wanted a job (at 5% for the whole of Wales and 2% in rural Wales); and for those with a second job (2% for the whole of Wales and 8% in the WRO survey).

6.7 Employment sectors; Business sizes; and Travel to work

In order to obtain information on the type of employment in rural Wales; the size of rural businesses; and on the distances rural residents travelled to work, respondents were asked a series of questions about their current work, or their previous work if they were currently not in employment. A similar range of questions was also asked for other household members who were either working or had previously held a job. Combining the results for both groups provided employment-related information for a total of 7,797 individuals.

In terms of employment sectors, the survey data reveal a total of 47 categories of workplace. Table 6.4 shows the proportions for the principal categories.

Table 6.4 Employment categories

Category	Count: 7,797	Category	Count: 7,797
Agriculture, hunting & forestry	4%	Public administration & defence	13%
Mining & quarrying	1%	Education	14%
Manufacturing	8%	Health & social work	15%
Electricity, gas & water supply	3%	IT	1%
Construction	6%	Cleaners/domestics	1%
Wholesale and retail: repair of motor vehicles	11%	Charity	1%
Hotels and catering	7%	Entertainment/media	1%
Transport, storage & communications	4%	Sports/leisure centres/sports coaching	1%
Banks, building societies & financial services	3%	Engineering (unspecified)	1%
Real estate, renting & business activities	2%	Others	3%

Other types of work recorded included childcare, tourism, journalism, hairdressing, fishing and the oil industry.

Broadly, the comments made in the 2007 report continued to hold true. Agriculture, hunting and forestry remain at a low level and, taken together, Public Administration, Education, and Health and Social Work account for a significant proportion of the employment of the survey sample. Indeed, these combined sectors increased their share by three percentage points from 39% in 2007 to 42% in 2010.

With regard to the size of businesses, enterprises, offices and other workplaces, respondents were asked to describe their place of work, and that of other working members of the household, by choosing one of seven categories – as noted in Table 6.4. A total of 4,560 individuals responded to this question and the results are shown in Table 6.5.

Table 6.5 Size and type of workplace

Category	Count: 4,560
A small private enterprise employing less than 10 people	25%
A small private enterprise employing 10 - 24 people	7%
A medium private enterprise employing 25 – 100 people	9%
A large private enterprise employing more than 100 people	19%
A public sector body	34%
A voluntary sector organization	2%
Others	4%

The table shows that the largest employer was the public sector, which employed just over a third (34%) of the survey sample. This finding resonates with the data shown at Table 6.4, which indicate that a high proportion of the survey sample was employed in the Public Administration, Education, and Health and Social Work sectors. As in 2007, the second most common type of workplace was a small private enterprise employing less than 10 people (25%), followed by a large private enterprise employing more than 100 people (19%).

The 2,215 respondents who were in employment were asked to provide the distances that they travelled to work. Table 6.6 and Table 6.7 display the results.

Table 6.6 Distance travelled to work

Distance from place of work	Count: 2,215
Work at or from home	13%
Less than 5 miles from home	30%
5 – 10 miles from home	20%
11 - 20 miles from home	17%
21 – 49 miles from home	11%
50 or more miles from home	3%
No fixed place of work	5%

The data reveal a positive correlation between distance travelled to work and household income. That is, larger proportions of those in the higher household income brackets travelled longer distances to work. As Table 6.7 shows, 22% of those with a household income of less than £10,000 worked from home compared with 10% of those respondents with an income of £52,000 or more. Additionally, 42% of respondents who earned less than £10,000 per annum travelled less than five miles to work, compared with 21% of the highest income group (£52,000 or more per annum). Only 2% of the lowest income group travelled more than 50 miles to work, compared with a greater proportion (8%) of respondents in the highest income group.

Table 6.7 Distance travelled to work and annual household income

	Less than £10,000 per annum	£10,000 to £20,999	£21,000 to £30,999	£31,000 to £51,999	£52,000 or more
Work at or from home	22%	14%	13%	10%	10%
Less than 5 miles from home	42%	38%	28%	25%	21%
Between 5-10 miles from home	13%	19%	25%	22%	19%
Between 11-20 miles from home	10%	16%	19%	18%	22%
Between 21-49 miles from home	8%	5%	10%	17%	16%
50 or more miles from home	2%	1%	2%	5%	8%
No fixed place of work	3%	7%	3%	3%	4%

Table 6.8 Mode of transport to work

Mode of transport	Count: 1,917
Household owned motorised transport	79%
Another person's motorised transport	4%
Bus	3%
Train	< 1%
On foot	10%
Bicycle	2%
Other	1%

Data on mode of transport to work revealed that the majority (79%) used their personal motor vehicles to travel to work, while relatively few respondents used public transport.

6.8 Employment opportunities

Respondents were asked to consider the availability of employment opportunities in their local areas, and in particular, whether they had experienced any difficulties in finding the type of job that they required. A similar question was also asked for the other members of the household of working age. A total of 5,336 individuals responded to this question. The responses are tabulated at Table 6.9.

Table 6.9 Difficulties in finding work in the local area

Response	Count: 5,336
Yes	31%
No	61%
Not applicable	8%

When asked whether the range of employment opportunities available in the local area had improved or become worse over the last few years, over half (54%) believed that the situation had deteriorated; a third had not seen any noticeable change; only 5% stated that it had improved; and a further 8% were unsure. In terms of age, 43% of respondents aged between 16 and 34 indicated that they had experienced difficulties in finding work in their local area in recent years.

The proportion of respondents who indicated that they had experienced difficulty in finding employment in each local authority area ranged between 25% for Monmouthshire and 37% for Denbighshire. From the results, it appears that difficulties relating to the search for employment tended to be more common in the more accessible areas.

The findings also show that the two principal difficulties experienced by respondents looking for work were, firstly that there were not enough jobs available in general (48%); and secondly, that there was a noticeable shortage of suitable jobs (45%). Other difficulties cited included transport, particularly where the prospective job was located at a distance from the home; and shortages of both full-time and part-time work.

Overall, the proportion of respondents who indicated that they had experienced difficulties in finding work had increased by seven percentage points between 2007 and 2010-11 - from 24% to 31%.

Key Findings

- 55% of all respondents were in employment (either full-time, part-time or in self-employment) and a third were retired. Of the remainder, 2% were in full-time education, 2% were unemployed, 3% were registered as long-term sick or disabled, and 3% indicated that they looked after the home.

- The distribution of employment sectors across rural households was broadly similar to the results for the previous survey in 2007.

- The results indicated a slightly higher proportion of households employed in public administration and defence, education, and health and social work – an increase from 39% in 2007 to 42% in 2010.

- 22% of respondents were employed in wholesale and retail, transport, and hotels and catering; 8% were employed in manufacturing; 6% in the construction industry; while the figure for the agriculture, hunting and forestry sectors remained low at 4%.

- 13% of respondents worked at or from home. Half of all respondents worked less than 10 miles from home. Of the remainder, 17% travelled between 17-20 miles, 11% travelled between 21-40 miles, and 3% travelled more than 50 miles.

- 43% of all respondents in the 16-34 age category noted that they had experienced difficulties finding work in their local area.

- The two principal difficulties experienced by respondents looking for work were (i) a shortage of jobs; and (ii) a shortage of suitable jobs.

7.1 Introduction

Issues concerning the natural environment and our relations with it remain prominent and amid a groundswell of environmental concern people are being urged to take actions and to undertake practices to help to protect the environment. However, the recession and the continuing parlous state of the economy have the potential to divert attention away from sometimes costly environment-related practices. Rural Wales possesses an abundance of resources both in its landscape and wider natural resources and many environment-related issues have considerable significance for its residents. This section explores the relationships of people in rural Wales with their environment; their attitudes towards environmental issues; and the extent to which they have adopted environmentally concerned practices. In addition, where appropriate, it draws comparisons with the results of the WRO Household Survey 2007.

The themes covered in this section include:

- The quality of the natural and agricultural environment
- Perceptions of policy initiatives aimed at the natural and the broader environment
- Perceptions of and reactions to issues of environmental concern
- Residents' attitudes to and adoption of environmental-related and energy conservation practices

7.2 The quality of the natural and agricultural environment

Respondents were asked whether or not they had perceived changes in some aspects of their local environment during the past five years. Table 7.1 shows the results for the overall quality of the natural environment.

Table 7.1 Perceptions of change in the natural environment

Response	Count: 4,062
Improved a great deal	6%
Improved a little	19%
Not changed	63%
Got a little worse	7%
Got a lot worse	3%
Don't know	2%

When the results for the 2007 and 2010-11 surveys are compared, it appears that a smaller proportion of respondents perceived improvements in the natural environment in 2010-11 (25% compared with 32% in 2007).

Closer examination of the results relating to changes in the natural environment shows that there was little variation in perceptions across gender, age groups, social class and the type of place where people lived. Table 7.2 shows how perceptions of change in the environment varied with income.

Table 7.2 Perceptions of change in the natural environment by income group

Count: 4062	Less than £10,000	£10,000 - £20,999	£21,000 - £30,999	£31,000 - £51,999	£52,000 or more
Improved a great deal	7%	6%	6%	4%	5%
Improved a little	18%	17%	21%	25%	19%
Not changed	60%	62%	63%	61%	70%
Got a little worse	8%	9%	6%	7%	5%
Got a lot worse	6%	3%	2%	2%	1%
Don't know	3%	2%	1%	2%	1%

The 2010-11 survey data show a general flattening-out across income groups. The two groups with the largest proportions of members that perceived improvements in the natural environment were those with annual incomes of between £21,000 and £30,999 and between £31,000 to £51,999 per annum.

Agriculture remains a prominent feature of the rural environment. Overall results for perceptions of the state of local agriculture are displayed at Table 7.3.

While perceptions of the state of local agriculture showed little variation across gender, age groups, income groups or social class, people living on a farm or in a property in the countryside, unsurprisingly, tended to have more definite views, as Table 7.4 shows.

Table 7.3 Perceptions of change in the state of local agriculture

Response	Count: 4,062
Improved a great deal	3%
Improved a little	8%
Not changed	46%
Got a little worse	13%
Got a lot worse	8%
Don't know	22%

Table 7.4 Perceptions of change in the state of local agriculture by place of residence

Count: 4,062	Town	Village	Farm or property in the countryside	Mixture
Improved a great deal	2%	3%	4%	2%
Improved a little	7%	7%	11%	9%
Not changed	45%	49%	39%	42%
Got a little worse	12%	12%	17%	9%
Got a lot worse	5%	8%	17%	8%
Don't know	28%	20%	12%	29%

People living the countryside were less likely to perceive no change in the state of local agriculture or less likely to not know than the other groups. Consequently, they were more likely to hold definite opinions on the subject: 15% perceived improvement compared to the overall figure of 11% (Table 7.3) but 34% perceived that the state of local agriculture had deteriorated, compared with an overall figure of 21% (Table 7.3).

7.3 Policy initiatives

All respondents were offered a range of policy initiatives and asked whether or not they had heard of them. Those who had heard of them were then asked if they were aware of any services, facilities or projects that had been funded through each policy initiative. Table 7.5 shows the combined results of these two questions.

Each of the policy initiatives was known by only a minority of the total survey sample of 4,062 respondents. The most well-known were Communities First (familiar to 47% of respondents), Objective One (45%) and the Rural Development Programme (43%). Only 6% were aware of Leader +, while 27% of the survey sample (1,088 people) had not heard of any of the policy initiatives.

With regard to awareness of any services, facilities or projects funded by these initiatives, the analysis shows that the most people (675) were aware of services, facilities or projects funded by Objective One, followed by 633 people who were aware of services, facilities or projects funded by Communities First. Few people (66) were aware of services, facilities or projects funded by Leader +.

Table 7.5 Awareness of policy initiatives and services, facilities or projects linked to them

Policy Initiative Count: 4,062	Aware of Initiative (Count)	Proportion of total (4,062)	Aware of service, facility or project (Count)	Proportion of those aware of initiative
Rural Development Programme	1,766	43%	369	21%
Leader +	246	6%	66	27%
Rural Community Action Programme	942	23%	193	20%
Objective One	1,813	45%	675	37%
Communities First	1,926	47%	633	33%
None of these	1,088	27%	-	-

7.4 Broader Environmental concerns and Energy Conservation

The survey questionnaire contained a series of questions designed to explore respondents' perceptions of, and attitudes to, environmental issues and how they were responding to these issues within the household.

The first question sought to gauge the extent to which environmental concerns had made respondents think about reducing household energy use and recycling. This question was also asked in 2007. The results are shown at Table 7.6.

Table 7.6 **The extent to which environmental concerns have influenced rural households to think about recycling or reducing household heating or lightning**

Response	Count: 4,062
A great amount	40%
A fair amount	38%
A little	14%
Not at all	7%
Don't know	1%

The results show that, if anything, there had been a slight decrease in environmental consciousness since the 2007 survey. However, it remained the case that environmental concerns greatly influenced rural households, with 78% of the survey population indicating that they thought a great or fair amount about recycling or reducing household energy use. Only 7% stated that they had not thought about these issues at all. A slightly higher number of females stated that they thought about environmental conservation action. Factors such as age, income and social class did not appear to have an influence on responses to questions of environmental consciousness.

In order to explore the extent that environmental conservation was actually practised, all respondents were asked whether or not they had, or were considering, a range of domestic conservation measures. Table 7.7 shows these results.

Table 7.7 **Domestic conservation measures**

Measure (Count: 4,062)	Have	Considering	Not Considering	Don't know
Loft insulation	85%	5%	9%	1%
Double glazing	89%	4%	4%	-
Solar panels	3%	22%	74%	1%
A wind turbine	-	14%	85%	1%
Cavity wall insulation	50%	7%	40%	3%
Energy-saving light bulbs	95%	1%	3%	-

The numerous grants available for loft insulation means it is considered the cheapest and most effective method of energy saving – as reflected in the significant proportion of respondents (85%) who had loft insulation in their household. Despite this, 14% of households indicated that they did not have loft insulation and 9% were not even considering it. It may be the case that it was not possible to insulate some of these lofts.

Household tenure appears to have a significant influence on the use of loft insulation. 88% of respondents who owned their own property had insulated their lofts, compared with 68% of respondents who were non-owners. While income was not as strong a determinant, there appeared to be a positive correlation with having loft insulation. The range started at 82% for the lowest income group and rose to 89% for the highest income group.

Double glazing continued to be more popular than loft insulation, which was also the case in 2007. In terms of tenure, 91% of home owners had double glazing compared with 79% of non-owners. Double glazing and income were positively correlated with the range starting at 85% for the lowest income group and rising to 90% for the highest income group.

Cavity wall insulation is the third commonly used method of domestic energy-saving, together with loft insulation and double glazing. Across the survey, 40% of respondents stated that their households had cavity wall insulation. Interestingly, a similar number of households indicated that they were 'not considering' cavity wall insulation. However, this may reflect the high proportion of older properties with solid, non-cavity, stone walls found in rural areas. While cavity wall insulation installation was fairly even across household income groups, there was some variation by household tenure: 52% of home owners had cavity wall insulation compared with 45% of non-owners.

The survey findings show that energy saving light bulbs were used by 95% of the survey population. As 'conventional' tungsten filament light bulbs are no longer produced, this proportion is likely to increase in the future as old stocks deplete.

Solar panels and wind turbines are relatively expensive in terms of capital outlay and are may also be subject to planning regulations, and climatic and geographical location requirements. Few respondents were operating either of these energy production installations. As it is unlikely that householders would remove existing forms of energy saving, there was a general increase in the proportions of households using them between the 2007 and 2010-11 surveys.

7.5 Recycling

The responses to questions about the provision of recycling services in respondents' local areas are shown at Table 7.8.

The survey results indicate considerable increases in the provision of recycling services across the four types of services that respondents were asked about. With regard to the two 'home collection' services (recycling collection and green waste collection) the results show that 'farms and properties in the countryside were the worst served: 45% of properties in the countryside indicated that they received green waste collections, compared with 80% in towns. Additionally, 80% of respondents who lived in properties in the open countryside had recycling collections from home, compared with 98% in towns. Few respondents professed not to know about recycling services.

All those respondents who had access to each type of recycling service were then asked whether or not they used the service. Table 7.9 shows these results.

Table 7.8: Provision of recycling services

	Recycling collection from home	Separate household collection of green waste	Bottle banks and paper banks	Public access recycling sites
Provided	94%	74%	91%	88%
Not provided	6%	24%	8%	10%
Don't know	-	2%	1%	2%

Table 7.9 Use of recycling facilities

	Recycling collection from home	Separate household collection of green waste	Bottle banks and paper banks	Public access recycling sites
Total with access to service	3,821	3,026	3,700	3,583
Use	97%	86%	84%	86%
Don't use	3%	14%	16%	14%

Across the four types of service, the results indicate high rates of use. A point for consideration is that respondents who compost green waste would not use green waste collection, which might account for the lower usage rates for the service. While both recycling collection from home and separate green waste collection usage rates had increased since 2007, the use of bottle banks and public access recycling sites had decreased slightly.

7.6 Ownership and use of motorised transport

Residents in rural Wales are often required to travel long distances, and the analysis in Section 5 shows that there were widespread problems with accessing public transport. As would be expected, ownership of motorised transport was high, with the vast majority (92%) of households surveyed indicating that they owned, or had access to a motor vehicle.

With such a high proportion of ownership it is difficult to identify significant determinants. However, some interesting results emerge. For example, 99% of respondents residing on a farm or property in the countryside owned a motor vehicle. Only 73% of those households with an annual income of less than £10,000 had a motor vehicle, and there appeared to be an upward trend in terms of income. A significant proportion (90%) of respondents with an annual income of between £10,000 and £20,999 had a motor vehicle, while car ownership among residents in the remaining income categories (over £21,000 through to those households with annual incomes of over £52,000) ranged from 97% - 99%. A trend linked to social class is also apparent. The proportion of social class DE that owned a motor vehicle was 81%. This proportion rises to 98% for social class AB.

Of those 3,741 households with a motor vehicle, 46% owned one; 40% owned two; and 14% had three or more. Again, the results reveal positive correlations between multiple vehicle ownership, rising income and social class.

The penultimate question about motorised transport concerned annual mileage. Respondents were asked to estimate the annual mileage of their household. These results are shown at Table 7.10. Unsurprisingly, they reveal that households living on farms or in a property in the country were the group most likely to have higher annual mileages. For example, 37% of households in this group had an annual mileage of more than 20,000 miles compared with 22% of those households in a town or city and 26% of those households in a village.

The results also reveal positive correlations between high annual mileage and those in work, and both income and social class. Of those respondents with annual household incomes of less than £10,000, only 9% had an annual mileage of more than 20,000 miles compared with 61% of those with a household income of £52,000 or more. There was a step change in those with annual mileages of more than 20,000 miles, which occurred between the income groups of £21,000 to £30,999 and £31,000 and £51,999. The proportions were 25% and 43% respectively.

Table 7.10: Annual household mileage

Annual mileage	Count: 3,741
Less than 1,000 miles	2%
1000 – 1999	3%
2000 – 2999	3%
3000 – 4999	6%
5000 – 9999	20%
10,000 – 14,999	21%
15,000 – 19,999	12%
20,000 or higher	26%
Don't know	6%

In terms of social class, there was a steady rise in the proportions of residents with annual mileages of more than 20,000 miles – from 13% for social class DE up to 34% for social class AB.

Finally, all 4,062 respondents were asked to estimate the degree to which their household's dependency on personal motorised transport had increased or decreased over the last five years. Table 7.11 shows these results.

Table 7.11: Household dependency on motorised transport over the last 5 years

Response	2007 (Count: 4,071)	2010-11 (Count: 4,062)
Increased greatly	19%	19%
Increased slightly	15%	14%
About the same	57%	58%
Decreased slightly	5%	4%
Decreased greatly	4%	4%

In general, these results reveal a continuing strong dependency on personal motorised transport. They show that while the majority of respondents perceived that their household's dependency on motorised transport had remained relatively stable, more than four times as many perceived that it had increased than perceived that it had decreased – 33% and 8% respectively.

Key Findings

- 25% of respondents thought the quality of the local natural environment had improved to some degree in the last five years - 63% perceived no change.

- 25% perceived improvements in the natural environment (compared with 32% in 2007).

- When questioned about the state of local agriculture 21% of respondents stated that it had worsened; 11% felt that it had improved; while 46% believed that it had stayed the same

- Just under half (47%) of all respondents were aware of the Communities First programme, 45% were aware of the European Union's Objective One programme, and a 43% had heard of the Rural Development Programme. Only 6% were aware of the European Union's LEADER+ programme. 27% of the survey sample were not aware of any of these policy initiatives.

- There appears to have been a small decrease in environmental consciousness since the 2007 survey.

- 92% of households surveyed owned or had access to a motor vehicle.

- Of those households with a motor vehicle, 46% owned one; 40% owned two; and 14% had three or more.

- Only 73% of those households with an annual income of less than £9,999 had a motor vehicle.

- 26% of households had an annual mileage of more than 20,000.

- 33% stated that their household's dependency on motorised transport had increased; 58% indicated that their dependency had remained relatively stable; and 8% that their dependency on a motorised vehicle had decreased.

- There were increases in the provision of recycling services.

- The provision of green waste and recycling collections appeared to be worse in the countryside than for towns.

- Both home collections for recycling and separate green waste collection had increased between the 2007 and 2010-11 surveys. However, the use of bottle and public access recycling sites had decreased slightly.