



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

# Rural Household Survey 2013



Cronfa Amaethyddol Ewrop ar gyfer Datblygu  
Gwledig: Ewrop yn Buddsoddi  
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Llywodraeth Cymru  
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### 1.1 An Outline of the Research

This report presents findings from a survey of households in rural Wales, by the Wales Rural Observatory [WRO] in 2013. It is the fourth in a series of household surveys carried out by the WRO: the previous surveys were in 2004, 2007 and 2010. The aim of this series of surveys has been to collect reliable and potentially comparative data on rural households in Wales. Analysis of these data, which include a longitudinal element, enables comparison and the identification of changes in rural households over time.

The 2013 survey questionnaire was arranged into six thematic sections: local social and community, wellbeing and welfare, rural service provision, rural employment and the economy, and the environment. This report is structured around these themes.

### 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.

<b>Rural Wards</b>	- predominantly rural or small town population profile;
<b>Service Centre</b>	- urban population profile with strong links to the surrounding rural areas;
<b>Host Ward</b>	- large town population profile and playing a key role in surrounding rural areas;
<b>Ineligible Ward</b>	- 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<sup>1</sup>.

### 1.3 Research Methodology

Using this definition, the survey was representative of rural Wales. It covered the nine predominantly rural local authorities, with the exception of small postal sectors within Bangor in Gwynedd, the coastal region of Conwy and Denbighshire, a postal sector on the south-west border of Powys, postal sectors in Abergavenny, Caldicot and Chepstow in Monmouthshire and a large south-east portion of Carmarthenshire. In Flintshire, Wrexham, the Vale of Glamorgan and the Valley authorities, the postal sectors located outside larger urban settlements were included. The survey also included the Gower postal sectors of Swansea.

Survey fieldwork was carried out between 15<sup>th</sup> April 2013 and 27<sup>th</sup> July 2013. In total, 4,002 interviews were completed. The longitudinal element of this total was drawn from 3,680 participants in the 2010 survey, who had intimated that they would be agreeable to participating in the 2013 survey. In the event, these previous participants yielded 1,486 interviews - a response rate of 40 per cent for the longitudinal element. The remaining interviews (2,516 households) were drawn from a sample of telephone numbers, which was structured by quotas for the Local Authority areas, gender, age and economic activity based on the 2011 Census. Table 1.1 shows the distribution of respondents across the different Local Authority areas that comprise rural Wales.

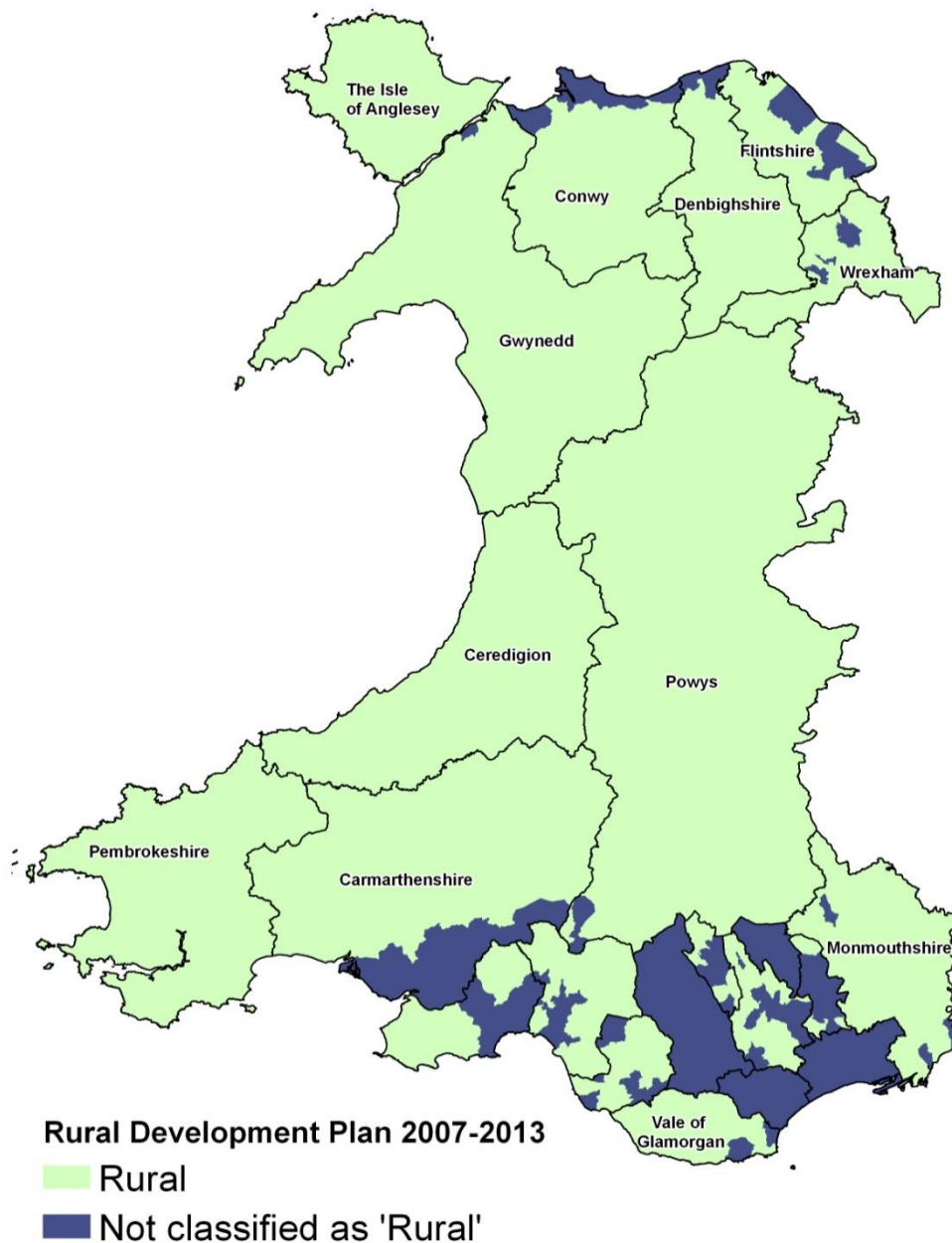
During the interview, respondents were asked to provide information about

<sup>1</sup> Further details on how these categories were defined are available at - <http://wales.gov.uk/docs/drah/publications/120110rdpsitanalysispt1.pdf> (p. 12-13)

themselves, their household and other individuals in 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 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. A total of 35 Welsh interviews, and one in another language, were requested by respondents.

**Figure 1.1 Map showing Classification areas in Wales using Rural Development Plan 2007 -2013**



Source: Welsh Assembly Government (2010)

**Table 1.1 The distribution of participants across Local Authorities in Wales**

	Local Authority	% of all interviews
<b>Rural authorities:</b>		<b>70%</b>
	Isle of Anglesey	6%
	Carmarthenshire	6%
	Ceredigion	6%
	Conwy	9%
	Denbighshire	7%
	Gwynedd	9%
	Monmouthshire	7%
	Pembrokeshire	10%
	Powys	11%
<b>Semi rural authorities:</b>		<b>13%</b>
	Flintshire	5%
	Wrexham	4%
	Vale of Glamorgan	4%
<b>Other rural wards<sup>2</sup> in Wales:</b>		<b>17%</b>

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<sup>2</sup> See Figure 1.1 for the distribution of other rural wards in Wales

## 2.1 Introduction

Population migration is a complex process of flows constituted by three interacting components: natural change (i.e. births and deaths), 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. On the other hand, the perceived negative effects of rural in-migration include the dilution of rural culture and social capital; the potential for an unbalanced and ageing population profile; conflicts in the countryside; and rising rural house prices<sup>3</sup>. Out-migration tends to be seen to have negative major impacts on rural areas, particularly in terms of sustainable communities and the loss of young people<sup>4</sup>, either unable to afford housing or unable to find employment. Rural Wales, as a repository of the Welsh language with a unique culture, is perceived to be particularly vulnerable to the detrimental effects associated with both in-migration and out-migration.

This section examines the characteristics of the rural population in Wales. It focuses on the following issues:

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

<sup>3</sup> See for example WRO reports - Population Change in Rural Wales: Social and Cultural Impacts, Central and Eastern European Migrant Workers in Rural Wales

<sup>4</sup> See for example WRO report - The Experiences and Aspirations of Young People in Rural Wales

## 2.2 Demography and Household Structure

The survey indicated that 27 per cent of respondents were single-person households, 36 per cent two person, 16 per cent three person, 14 per cent four person, four per cent five person, and two per cent of households had six or more persons.

With regard to gender, 56 per cent of the respondents were female and 44 per cent 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	11%
35-44	10%
45-54	22%
55-59	10%
60-64	11%
65-74	18%
75+	15%

Outright ownership was the most common type of household tenure at 41 per cent. The next most common type of household tenure was ownership through a mortgage at 29 per cent. Private rental accounted for 12 per cent, with Local Authority rental at 10 per cent and Housing Association rental at six per cent.

Householders in the upper age categories were more likely to own their own houses outright: 62 per cent of over 55s owned their own property, compared with seven per cent of the under 35s. By contrast, those respondents under 35 were more likely to rent from a private landlord (31 per cent); the local authority (13 per cent); or a housing association (seven per cent).

Table 2.2 shows the relationship between household tenure and age.

**Table 2.2 Household Tenure by age<sup>5</sup>**

Tenure	All	16-34	35-54	55+
	%	%	%	%
Owned Outright	41	7	22	62
Owned on a Mortgage	29	35	52	14
Rented – Local Authority	10	13	6	11
Rented-Housing Association	6	7	6	5
Rented-Private Landlord	12	31	12	6
Other	2	6	2	2

### 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, or a mixture of these categories. The highest proportion of respondents, at 48 per cent, lived in a country village and 35 per cent lived in a town. A further 12 per cent 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 (two per cent) or in a smaller city (one per cent).

Respondents were also asked to define the type of settlement in which they had spent most of their lives: 37 per cent of respondents had spent most of their lives in a village; 36 per cent in a town; 10 per cent in a property or farm in the country; 13 per cent in or around cities; and four per cent in a mixture of these types of places.

### 2.4 Levels of satisfaction with place of residence

<sup>5</sup> Note: Home ownership in the 16-34 category is diverse in terms of life course stages/experiences.

Across the survey, 93 per cent 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 four per cent of respondents stated that they were dissatisfied with their local area. Dislikes cited included a lack of services, such as shops and community facilities, and also poor public transport provision<sup>6</sup>. Generally, respondents appeared to be happy with their local areas as places to live; as illustrated by the 43 per cent of respondents who did not express any dislikes about the area where they lived.

### 2.5 Length of Residence

In similar ways to the previous surveys, the 2013 survey provided evidence of both population stability and mobility in rural Wales. Approximately a third (34 per cent) of respondents had lived in their present property for 21 years or longer and a further 48 per cent for between five and 21 years. The upper age groups were the most stable demographic group, with half of all respondents aged 55 or over residing in their property for 21 years or longer.

However, as Table 2.3, which also compares the data for 2010 and 2013, illustrates, this pattern of stability co-existed alongside considerable population change, with 15 per cent 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.

<sup>6</sup> In the WRO Rural Services Survey 2013 a quarter of community clerks in rural Wales felt that service provision was good or very good, 45 per cent considered it satisfactory, and 31 per cent considered it poor or very poor. Please see the report for further details.

**Table 2.3 Length of residence by age**

Length of residence	All		16-34		35-54		55+	
	2010	2013	2010	2013	2010	2013	2010	2013
	%	%	%	%	%	%	%	%
Under 1 year	2	4	9	13	2	4	1	1
1 - 5 years	19	15	44	39	22	17	10	8
6 - 10 years	22	17	24	27	26	20	18	13
11 - 15 years	14	18	9	8	18	24	13	16
16 - 20 years	11	13	8	7	13	17	9	12
21 - 25 years	10	9	4	3	9	9	11	10
26 - 30 years	7	8	1	2	5	5	10	11
31 – 40 years	9	10	1	1	2	3	16	17
41+ years	6	7	0	0	2	2	10	12

Comparing the 2010 and 2013 data confirms a pattern of greater mobility in the younger age groups. By contrast, the 55+ age group remained fairly evenly distributed across the length of residence bands and peaked at 16-17 per cent in the 31-40 years of residence.

Nevertheless, the data presented in this section reports length of residence relative to the age of the head of the household. Therefore results are only indicative of net patterns of mobility and stability within rural Wales. Further analysis regarding inward and outward migration is provided in the following section.



## 2.6 Inward- and outward-migration

The survey also pointed to processes of migration, both in to and out of rural Wales.

At 89 per cent a large proportion of respondents stated that they had not always lived in their local area. However, 37 per cent of these 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, 42 per cent had moved to an area that was located less than five miles from their previous place of residence, and a further 22 per cent had moved a distance of between five and 20 miles. At 15 per cent, a smaller proportion of respondents had moved from an area located between 20 and 100 miles away, while just over one fifth (21 per cent) had moved a distance in excess of 100 miles.

At 44 per cent, less than half of in-migrants had previously lived in a country village or in a property or farm in the countryside. As 37 per cent had previously lived in a town and 17 per cent in or around a city, there were indications of movement from urban to rural areas.

The reasons cited by respondents for moving to their current place of residence included personal reasons, such as 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 (36 per cent); 24 per cent had moved into their area to find a larger or more suitable property; and 16 per cent cited employment-related reasons. Given the apparently common perception that many people move to rural Wales to retire<sup>7</sup>, the five per cent of respondents who cited 'other reasons for

moving including retirement', seemed low<sup>8</sup>.

In terms of out-migration from rural Wales, the 2013 results pointed to similar patterns as that found in the previous WRO surveys. That is, 21 per cent of all respondents indicated that a member of their household had moved out during the previous five years and while 49 per cent of these had remained in rural Wales, 27 per cent had moved to England and 19 per cent had relocated to another area in Wales. At 88 per cent, a majority of out-migrants were under the age of 35. The three principal reasons cited by respondents for moving out of the household were to attend college or university (24 per cent); to set up home elsewhere (31 per cent); and to find better employment opportunities in a new area (16 per cent). Table 2.4 compares data for out-migration across all four surveys.

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<sup>7</sup> See for example WRO report - The Experiences and Aspirations of Young People in Rural Wales

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<sup>8</sup> It is possible that some may have opted for being close to family and friends to cover priorities during retirement

**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
2013	41	8	19	32

Comparing the four surveys, shows that local movement was the most volatile. Over time, movements to elsewhere in rural Wales and to outside Wales had trended downwards, although movements to places outside Wales still represented a large proportion. By contrast, movements to elsewhere in Wales displayed an upward trend. These results pointed to a general pattern of net migration from rural Wales.

## 2.7 National Ethnicity and Identity

Table 2.5 below compares 2010 and 2013 results. Generally, the two sets of results were similar. In 2013, just over half of all respondents (52 per cent) defined themselves as Welsh. As in 2010, there was a tendency for higher proportions of younger respondents (16-34) to define themselves as Welsh.

While in most categories, changes were limited to four percentage points, there were noticeable differences in the English and British categories. In 2013, greater proportions defined themselves as British

and smaller proportions as English, with the greatest differences, of nine and five percentage points respectively, in the 16-34 age group. The other age groups had the same direction of change but with smaller magnitudes. Two possible explanations are: there might have been more Scottish and Irish in-migrants; or there might have been an age-related change in the way that people born in England define their nationality.

With regard to ethnicity, 99 per cent of respondents defined themselves as white, which was the same in 2010.

**Table 2.5 National Identity by age**

National Identity	All		16-34		35-54		55+	
	2010	2013	2010	2013	2010	2013	2010	2013
	%	%	%	%	%	%	%	%
Welsh	51	52	58	57	54	54	47	4
British	29	32	27	36	28	32	30	31
English	16	12	10	5	14	10	19	16
Other	4	4	6	2	4	4	3	4

## 2.8 The Welsh Language

Table 2.6 and Table 2.7 show Welsh language ability by length of residence and age group respectively. The tables indicate that 15 per cent of all respondents stated that they could speak Welsh fluently, which was the same in 2010. Taking together fluent Welsh speakers and those who could speak the language 'quite well', gives the proportion of Welsh speakers as 23 per cent. This result was slightly lower than the figures recorded for the 2004, 2007 and 2010 surveys.

Table 2.6 shows that competence in the Welsh language tended to increase with length of residence in the rural locality. While results in each category were comparable between 2010 and 2013, with only small percentage point differences, there was a spike of seven percentage points of those respondents who spoke 'only a few words', in the six - 20 year residence band. As in this age band there were small declines since 2010 in the three most competent categories and the

proportion of respondents in this age band who could not speak Welsh at all had declined by three percentage points, a possible inference is that recent in-migrants were learning the Welsh language.

Table 2.7 shows that the proportion of those respondents competent in Welsh was increasing in the youngest (16-34) age group. To certain extent, this resonated with the tendency for higher proportions of younger respondents (16-34) to define themselves as Welsh discussed above at Table 2.5. Most of the categories in Table 2.7 were relatively stable. Arguably, however, the 'improvements' in Welsh language ability in the 35-54 and 55+ age groups indicated by the results in the 'only a few words' and 'not at all' categories, support the inference made in the discussion of Table 2.6: that recent in-migrants were learning the Welsh language.

**Table 2.6 Welsh language ability by length of residence**

	All		5 years or less		6 – 20 years		21 years or more	
	2010	2013	2010	2013	2010	2013	2010	2013
	%	%	%	%	%	%	%	%
Fluently	15	15	12	16	14	13	19	18
Quite well	9	8	8	7	9	8	10	9
Speak a few sentences	21	20	22	23	21	20	18	19
Only a few words	33	37	33	35	33	40	32	34
Not at all	22	19	24	19	22	19	21	19

**Table 2.7 Welsh language ability by age**

	All		16-34		35-54		55+	
	2010	2013	2010	2013	2010	2013	2010	2013
	%	%	%	%	%	%	%	%
Fluently	15	15	17	23	16	15	14	13
Quite well	9	8	10	9	10	9	8	8
Speak a few sentences	21	20	26	28	22	21	18	18
Only a few words	33	37	28	29	31	39	35	38
Not at all	22	19	18	11	20	17	25	23

Table 2.8 shows where the Welsh language was used in day-to-day life<sup>9</sup>. Compared with 2010, there was a small decline in 'mostly' used for all situations. However, these declines were approximately matched by increases in the 'sometimes' used category. There was little variation in the other categories and situation

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<sup>9</sup> By those who could speak Welsh Fluently or quite well.

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

2013	Mostly	Sometimes	Rarely	Never	Not applicable
	%	%	%	%	%
At home	43	24	17	13	3
At work	32	28	8	6	26
With friends and neighbours	41	34	12	13	0
Within the community	31	40	14	13	1

Table 2.9 compares 2010 and 2013 in terms of the proportions of fluent Welsh language speakers in each sampled Local Authority area. As the table shows, between the two surveys there were few changes in the geographical distribution of Welsh language speakers. Gwynedd (51 per

cent), Anglesey (34 per cent), Ceredigion (26 per cent) and Carmarthenshire (24 per cent) continued to have relatively high proportions of fluent Welsh speakers. However, Powys experienced a decline of four percentage points and halved its proportion of fluent Welsh speakers from eight per cent to four per cent.

**Table 2.9 Proportion of fluent Welsh speakers in Local Authorities surveyed**

	Speak Welsh Fluently 2010/11	Speak Welsh Fluently 2013
	%	%
All	15	15
Carmarthenshire	25	24
Ceredigion	24	26
Conwy	13	14
Denbighshire	14	15
Flintshire	10	7
Gwynedd	49	51
Anglesey	35	34
Monmouthshire	1	1
Pembrokeshire	6	8
Powys	8	4
Vale of Glamorgan	2	3
Wrexham	5	6
Other LA surveyed	5	8

## Summary of Key Findings

- 63 per cent of the households in the survey of rural Wales contained two or fewer members.
- 27 per cent were single person households.
- 41 per cent of respondents owned their home outright.
- 34 per cent of respondents had lived in their present property for more than 20 years, while 19 per cent of respondents had lived in their property for less than five years. Long-term residence was more likely in the upper age groups.
- 89 per cent of respondents indicated that they had not always lived in their local areas. Of this figure, 37 per cent had returned to an area where they used to live.
- Over half of respondents (52 per cent) considered themselves Welsh.
- Younger respondents were more likely to speak Welsh and consider themselves Welsh.
  - 23 per cent of respondents spoke Welsh, either fluently or quite well
  - 19 per cent of respondents could not speak Welsh.

## SECTION 3 LOCAL SOCIAL AND COMMUNITY CONTEXT

### 3.1 Introduction

This section focuses on respondents' experiences and perceptions of community life. It is structured around the following themes:

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

### 3.2 Family and community networks

Results in 2013 were similar to the 2004, 2007 and 2010 surveys, with the survey data pointing to the existence of close family and community networks amongst rural households. At 64 per cent, a large proportion of the respondents lived within

10 miles of at least one family member. More specifically, 31 per cent of all respondents stated that they lived within one mile of a close family member; 22 per cent lived more than one mile but less than five miles; and 11 per cent lived more than five miles but less than 10 miles from a family member.

Table 3.1 shows the extent of family networks according to each age category. Younger respondents were more likely to live close to a family member, with 60 per cent in the under 35 age group stating that a family member lived less than five miles away, compared with 50 per cent of the over-55 group. The relatively high proportion of respondents in the over-55 age category (24 per cent) who indicated that their family members lived at a distance of 50 miles or more, points to a pattern of in-migration in 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	39	34	28
More than 1 mile but less than 5 miles away	22	21	21	22
5 miles or more but less than 10 miles away	11	11	14	10
10 miles or more but less than 50 miles away	14	14	13	14
50 miles or more	21	15	17	24
No other family	1	0	0	2

Respondents who had spent most of their lives in Wales were much more likely to have a local family network, with 60 per cent stating that they lived less than five miles from a family member. By contrast, 49 per cent 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 appeared to have influenced degrees of family attachment: 59 per cent of respondents who had lived in their current property for more than 20 years had a family member who lived less than five miles away.

National identity and Welsh language skills were shown to be key factors in local family networks in rural Wales. At 65 per cent, almost two-thirds of respondents who considered themselves to be Welsh lived less than five miles away from a family member, which was a considerably greater proportion than for the other nationalities<sup>10</sup>. Those respondents who spoke Welsh, either fluently or quite well, were also less likely to live a considerable distance away from close family: 61 per cent lived within five miles of another family member. The corresponding figure for those who spoke no Welsh at all was 48 per cent. Moreover, 25 per cent of respondents who spoke no Welsh at all had no family members living within a 50 mile radius.

In terms of family and friends, 53 per cent of all respondents had between one and 10 close friends or family members living within five miles of their home, and a further 38 per cent had more than 10 close friends or family members living nearby. While age was not a key factor in these family and community networks, 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. These results were similar to the previous surveys.

Also similar to the previous surveys, strong levels of community interaction were apparent: 56 per cent spoke to their neighbours on most days, and 31 per cent did so once or twice a week. There was some variation by age. Respondents those aged 55 or over were more likely to speak to their neighbours on a daily basis compared with younger groups (59 per cent and 52 per cent respectively). Table 3.2 shows the variations by income, where lower income groups were more likely to interact with their neighbours on a daily basis.

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<sup>10</sup> 41% for other nationalities



**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	56	63	57	56	48	49
Once or twice a week	31	22	31	33	3	36
Once or twice a month	7	7	7	7		9
Less often than once a month	3	4	3	3	4	3
Never	3	4	3	2	3	4

Analysis also indicated that people living in small settlements were more likely to have interaction with their neighbours than either those respondents who lived in more urban areas, or, unsurprisingly given the distances involved, those who lived in remote locations. For example, 59 percent of all respondents who lived in a country village stated that they spoke to their neighbours on most days, compared with 57 per cent of those who lived in a town or city and 38 per cent of respondents who lived in a property or farm in the open countryside.

### 3.3 Involvement in local activities and organisations

In terms of membership of local and national organisations, 45 per cent of all respondents were involved in activities organised by local and national groups and societies. This was 11 percentage points fewer than in 2010. Breaking down this overall figure, 11 per cent held membership of a sports club; eight per cent were involved with activities relating to the local church; and four per cent were involved with a local voluntary or charity group.

Involvement in certain activities, such as those linked to local sports clubs or centres, tended to increase with levels of income: 18 per cent of respondents in households with an annual income of £52,000 or more indicated that they regularly participated in such activities, compared with six per cent 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: 28 per cent of respondents had attended a public meeting; 43 per cent had signed a petition; 19 per cent had contacted their local Councillor; and a further 15 per cent had contacted their Member of Parliament or Assembly Member. As these figures were similar to the results of the previous surveys, it suggests that the level of political engagement in rural Wales had remained approximately the same during the nine 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	2004	2007	2010	2013
	%	%	%	%
Attended a public meeting	28	29	30	28
Contacted your MP or Assembly Member	15	15	18	15
Signed a petition	41	45	40	43
Contacted your councillor	19	19	20	19
Provided care for neighbours or friends	44	43	45	39
Completed a survey from a Council or community group	27	23	25	20
Participated in a protest or street demonstration	5	3	3	4
None of these	13	12	26	-
Voluntary Work for charity or organisation	35	32	-	33

Although the figures were down on those of the 2010 survey, care and support activities remained important elements of life in rural Wales. For example, 39 per cent (45 per cent in 2010) had provided care for neighbours and friends during the last 12 months.

Female respondents continued to be more likely to be involved in the provision of care and support services: 43 per cent (47 per cent in 2010) indicated that they were involved in these activities, compared with 34 per cent for male respondents. The proportion of male respondents engaged in care and support activities was down from 42 per cent in 2010.

Respondents in the upper age categories were more likely to provide care and support: 41 per cent (46 per cent in 2010) of those over 55 years were regularly involved compared with 38 per cent (45 per cent in 2010) for those respondents aged between 34 and 55, and 36 per cent (39 per cent in 2010) of those aged under 35.

Both length of residence and Welsh language skills had a positive effect on levels of care provision. Longer term residents were more likely to provide care and support. For example, 39 per cent (46 per cent in 2010) of respondents who had

resided in their property for 20 years or longer provided support; 41 per cent (46 per cent in 2010) of those who had spent between six and 20 years in their current home; and 34 per cent (39 per cent in 2010) of those who had lived in their property for less than six years. In terms of Welsh language skills, 42 per cent (49 per cent in 2010) of all respondents who spoke Welsh provided care and support in their communities.

### 3.5 Involvement in voluntary work

Involvement in voluntary work was also down compared with 2010: 33 per cent of respondents had carried out some form of voluntary work for a local charity or organisation during the previous 12 months, compared with 39 per cent in 2010. In addition, whereas in 2010 there was no differentiation in responses according to gender and age, in 2013, 35 per cent of the over 55 group engaged in voluntary work compared with 25 per cent of those under 35. Respondents in the upper income categories (annual household incomes of £31,000 or more) were more likely to be involved in voluntary work.

While the proportion of fluent Welsh language speakers engaged in voluntary work was relatively high at 33 per cent, this represented a decline of 12 percentage points compared with the 45 per cent recorded in 2010. Results for those who spoke only a few words or sentences (35 per cent) and those who spoke no Welsh at all (27 per cent) were also down compared with 2010 (40 per cent and 32 per cent respectively).

As discussed above, the levels of provision for care and support, and voluntary work were lower in 2013 than in 2010. Given that there are costs to providing care and support, and in doing voluntary work, it might have been that the economic recession was compromising the ability of some households to provide care and support in their communities. In addition, as more women provided these services, the perceived need, during a recession, for more women than otherwise to seek paid work might have had an effect on these data.

### 3.6 Social Capital and local community

The survey explored other aspects of social capital, such as community feeling, belonging, solidarity, isolation and safety. Results were similar to those in 2010.

#### (i) Community Feeling

At 78 per cent a majority of respondents agreed that there was a sense of community in their local area. This proportion did not vary to any great degree across the categories of age, and length of residence.

#### (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 (35 per cent) of respondents strongly agreed when questioned, which added to the 46 per cent who tended to agree, gave 81 per cent who considered themselves to be members of the local community.

Unsurprisingly, these feelings of attachment to the local community appeared to be strongest among long-term respondents who had lived in the same property for more than 20 years. However, there was also a majority of more recent in-movers who agreed that they felt part of their local community.

The ability to speak Welsh, fluently or quite well, had only a small influence on respondents' attachment to the local community. At 83 per cent a majority of Welsh-speaking respondents agreed that they were an active member of the local community. The proportion responding positively was slightly lower amongst those who spoke only a few Welsh words or sentences (82 per cent) and for those who spoke no Welsh at all, it was 76 per cent. 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: 12 per cent tended 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 per cent agreed with the statement, while 62 per cent did not consider it to be a significant issue.

Overall, those respondents who classified themselves as 'Welsh' were slightly more likely to consider themselves as part of the local community, at 82 per cent. This compared with respondents who classified themselves as 'British' (80 per cent), 'English' (80 per cent) or 'None of these' (78 per cent).

Feelings of attachment to the local community were highest among the older age groups, with 41 per cent 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: 31 per cent of respondents aged between 35-54 and 21 per cent of respondents under the age of 35 agreed strongly (a big drop compared with older age groups).

### **(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 per cent of all respondents agreed that people in their local community looked out for one another. Only 10 per cent disagreed. There was a tendency for agreement to increase with age.

### **(iv) Perceptions of isolation**

Survey participants were asked to respond to the statement 'It can feel isolated living where I do'. Overall, 19 per cent of respondents agreed with this statement. In terms of age, 26 per cent of all respondents under the age of 35 years agreed that they sometimes felt isolated in their area. Deeper analysis of the raw data revealed that this rose to 42 per cent among people between 16-24 years old. The corresponding results for survey participants in the 35-54 years, and 55 years or over age groups were 20 per cent and 18 per cent respectively. It might have been that isolation for younger people was synonymous with lack of contact with their peer group and the difficulties of reaching social and entertainment venues<sup>11</sup>, hence the high readings for this age group, whereas for older people it might have meant isolation from the support of family and friends.<sup>12</sup> Given the close and supportive communities apparent from the survey, and discussed in this section, smaller proportions of older people would be likely to feel isolated.

### **(v) Perceptions of safety**

The survey results suggested that rural Wales was viewed as a relatively safe place to live, with strong community relations. At 96 per cent, almost all of respondents felt safe in their community and 86 per cent of respondents disagreed with the statement 'The rate of crime is high in this area'.

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<sup>11</sup> Further research is available in the WRO report 'Experiences and Aspirations of Young People in Rural Wales'.

<sup>12</sup> For further discussion, see section 5.3 of the WRO report 'Older People and Place in Wales'

## Summary of Key Findings

- 53 per cent 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. 65 per cent who defined themselves as Welsh and 61 per cent who spoke Welsh fluently or quite well lived less than five miles from a family member.
- 87 per cent of respondents indicated they spoke to their neighbours at least once or twice a week, with 56 per cent 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.
- 45 per cent of respondents were involved in activities organised by local and national groups and societies.
- 33 per cent of 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.
- 39 per cent of respondents had provided care and support services for neighbours or friends during the last 12 months.
- 81 per cent considered themselves members of the local community. Respondents who defined themselves as Welsh were more likely to consider themselves part of the local community.
- 96 per cent felt safe living in their community.
- 19 per cent of respondents felt isolated living in their local area. Such feelings of isolation appeared to decrease with age.

#### 4.1 Introduction

In addition to its formal, institutionalised understandings, welfare is constituted in aspects such as health and wellbeing. This section explores these issues in rural Wales by examining the perceptions of the respondents. The section covers the following themes:

- A summary of respondents' reported 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 receipt of benefits

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 4,002 respondents, 25 per cent either stated that they did not know their household income or refused to answer the question<sup>13</sup>. Table 4.1 shows the proportions in each income range of the 3,012 householders who provided this information.

<sup>13</sup> Further analysis revealed that those who did not provide an income band were most likely to represent male respondents, those living in the Vale of Glamorgan or Monmouthshire, people of ages 35 to 54, and households containing four to five people. The corresponding proportion in the 2010 survey was 22%.

**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	13
£21,000 - £30,999	22
£31,000 - £51,999	18
£52,000 or more	13

The household income data at Table 4.1 confirm the prevalence of low incomes in rural areas of Wales. Nearly half (47 per cent) of all households had an annual income of less than £21,000, while 17 per cent earned less than £10,000 per annum. Of the remaining households, 40 per cent had an annual income of between £21,000 and £51,999, and 13 per cent of households had annual incomes of £52,000 or more.<sup>14</sup>

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.

<sup>14</sup> UK median household income: £31,477 (ONS: Summary: Tables from the Effects of Taxes and Benefits on Household Income 1977-2011/12).

60 per cent of median household income is the most commonly used low income threshold = £18,900 (poverty.org.uk).

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

Local Authority	COUNT	% of all interviews in each LA
Isle of Anglesey	28	13
Carmarthenshire	27	12
Ceredigion	29	13
Conwy	48	13
Denbighshire	43	15
Gwynedd	54	14
Monmouthshire	25	9
Pembrokeshire	52	14
Powys	49	12
Flintshire	22	10
Wrexham	21	12
Vale of Glamorgan	8	6
Rural Wards in Urban and Valley LA	108	16
<b>SURVEY TOTAL</b>	<b>528</b>	<b>13%</b>

Table 4.2 highlights the smaller proportions of low income households in Monmouth (nine per cent) and the Vale of Glamorgan (six per cent).

The sources of household income are paid work, unearned income, pensions and benefits. 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	7
Interest from Building Society and/or Bank Savings Account	36
Dividends from shares	19
Other investment income	12
None of these	40

Respondents living in the 2,127 households with people aged 55 years or over were asked if they were in receipt of a private, stakeholder or occupational pension: 60 per cent of these households contained people in receipt of a pension, which represents 34 per cent of the total survey sample.

Table 4.4 shows the proportions of the households surveyed in receipt of a range of benefits. Data from the 2007 and 2010 surveys are shown for comparison.

The table indicates considerable increases in the proportions of households receiving

Disability Living Allowance or Attendance Allowance, Council Tax Benefit, and Housing Benefit or Local Housing Allowance. However, the category that had increased the most was 'Others'. These 'Other' benefits included bereavement, fostering allowance, mortgage assistance, council tax discounts, mobility allowance, and industrial accident and injury.

The proportion of households in receipt of some type of benefit had increased from 46 per cent in 2007 to 69 per cent in 2013.

**Table 4.4 Households receiving benefits**

Benefits or Tax Credits	2007 % of households	2010-11 % of households	2013 % of households
Income Support	5	4	5
Jobseeker's Allowance	1	2	2
Incapacity Benefit	7	8	6
Disability Living Allowance or Attendance Allowance	10	13	17
Working Tax Credit	9	10	9
Council Tax Benefit	9	12	18
Housing Benefit or Local Housing Allowance	4	6	12
Training Allowance	-	<1	<1
Education Maintenance Allowance	1	3	2
Winter Fuel Payments	19	38	39
Carers Allowance	3	4	5
Others	1	13	33
None of these	54	36	31



The relatively high proportion of respondents claiming Winter Fuel Allowance was maintained, with a small increase. In the 2010 report, it was suggested that the increase from 19 per cent in 2007 to 38 per cent in 2010/11, might have been due to increases in the numbers of people aged over 60 in rural Wales<sup>15</sup> and to recent hard winters. Arguably, these reasons still held. In addition, this allowance is now better publicised, which might encourage more people to claim it.

Respondents were also asked if income levels in their locality had improved or worsened over the past few years. Of those who felt that incomes had worsened, 25 per cent felt that they had worsened 'a little' and 24 per cent felt that incomes had worsened 'a lot': i.e. 49 per cent considered that incomes had worsened. At 47 per cent a large proportion felt that incomes had not changed. Only four per cent felt that incomes in their locality had improved during recent years.

When asked for an estimate of their household savings, respondents were offered ranges rather than specific amounts. Table 4.5 shows the savings data. None of the savings bands showed an 'improvement' since 2010. More than two in five households (44 per cent) had savings of less than £1,000; an increase (worsening) of 11 percentage points since 2010.

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<sup>15</sup> 43% of respondents were aged over 60 in the current survey.

**Table 4.5 Household Savings (excluding value of property)**

Amount of Household Savings	Proportion of households 2010/11	Proportion of households 2013
	%	%
Less than £1,000	33	44
Between £1,000 and £1,999	8	5
Between £2,000 and £4,999	12	9
Between £5,000 and £9,999	10	9
Between £10,000 and £19,999	11	10
Between £20,000 and £49,999	11	10
Between £50,000 and £99,999	6	6
Over £100,000	8	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, 41 per cent 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 reported amounts paid per month.

**Table 4.6 Mortgage or Rent per month**

Monthly Mortgage / Rental payments	Proportion of households
	%
Nothing	6
Less than £50	4
£50 – £99	6
£100 – £199	5
£200 – £299	14
£300 – £399	18
£400 – £499	17
£500 – £699	19
£700 – £999	8
£1,000 or more	4

### 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	33
Coping on present income	47
Finding it difficult on present income	13
Finding it very difficult on present income	5
Don't know or Refused	1

When asked how much of a problem it would be if the respondent had to find £100 to meet an unexpected expense, five per cent stated that it would be impossible to find and a further 26 per cent indicated

that they would experience difficulty, while the majority of respondents (69 per cent) felt that they would find it fairly easily. These responses varied according to the level of household income: 63 per cent 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 scenario.

**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	4	10
Spouse or partner	50	19
Other household member	16	7
Relative outside of household	47	54
Friend	17	11
Neighbour	16	2
Work colleague	<1	1
Voluntary or other organization	2	1
Other	2	<1
Would prefer not to ask for help	1	10
Don't know	<1	2

The data at Table 4.8 suggest that people in the survey perceived difficulty in asking for financial assistance or preferred not to ask. By contrast, people had relatively little difficulty in asking for help in other situations, for example, when confronted with an illness. Spouses, partners,

relatives and neighbours were the most commonly named sources.

#### 4.5 Health, Illness and Disability

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. Almost one third of the survey sample (32 per cent) indicated that they had a long-standing illness, disability or infirmity, and 17 per cent indicated that another member of their household suffered from a long-standing illness, disability or infirmity.

Unsurprisingly, the incidence of long-standing illness, disability or infirmity was correlated positively with increasing age: 42 per cent of respondents aged 55 years or over had a long-standing illness, disability or infirmity. There was also a negative correlation with income: 58 per cent of respondents in households with an annual household income of less than £10,000 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<sup>16</sup>, 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.

At 85 per cent, a substantial proportion of the survey sample had a personal computer with a Broadband connection within the property. There was a correlation with household income. For example, at the lower income bands, of the households who indicated that they did not have access to Broadband within their property, 34 per cent had an annual income of less than £9,999; 19 per cent had an annual income of between £10,000 and £20,999; and 25 per cent were classified as 'economically inactive'.

Of the households without Broadband, two per cent had a personal computer with a Dial-up Internet connection; 13 per cent

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<sup>16</sup> See WRO report on Poverty and Social Exclusion in Rural Wales

had a personal computer without an Internet connection; and 85 per cent did not have a computer. Households in the lower income categories were more likely to indicate that they did not own a computer<sup>17</sup>.

With regard to Internet access outside the household property, 56 per cent of the total survey sample had Internet access at work or in a café.

Internet access is, however, not necessarily limited to a computer: 61 per cent of the total survey sample had a mobile telephone or similar device that enabled access to the Internet.

Digital television coverage was widespread with 94 per cent 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, 57 per cent all households thought that this was the case. This represented a steady increase from 43 per cent in 2007 and 52 per cent in 2010.

Table 4.9 compares the 2007 and 2010-11 data by local authority area.

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<sup>17</sup> For example 66 per cent of those with an annual household income of less than £10,000 owned a computer compared with 99 per cent of households with an income of £52,000 or more.

**Table 4.9 Perceptions of poverty by Local Area Authority**

Local Authority Area	2007 (YES)	2010-11 (YES)	2013 (YES)
	%	%	%
Isle of Anglesey	45	53	51
Gwynedd	51	56	63
Conwy	46	56	57
Denbighshire	45	56	66
Flintshire	36	45	46
Wrexham	34	43	57
Powys	39	48	51
Ceredigion	43	53	58
Pembrokeshire	43	54	56
Carmarthenshire	45	48	60
The Vale of Glamorgan	25	39	35
Monmouthshire	41	42	55

With an overall increase of five percentage points, perceptions were generally higher. The exceptions were the Isle of Anglesey and the Vale of Glamorgan, which both witnessed small downturns in the perception of poverty since 2010, although levels were still higher than in 2007. There were notable increases in the perception of poverty in Gwynedd, Denbighshire, Wrexham, Carmarthenshire and Monmouthshire (the most prosperous area in Wales). Apart from Gwynedd these all experienced double-digit percentage point increases in the perception of poverty. Denbighshire remained the area with highest proportion of respondents who perceived poverty.

Older people were less likely to perceive poverty in their local area: 48 per cent of those aged over 55 years acknowledged the presence of poverty in their local area,

compared with 68 per cent of the 35 -54 age group and 65 per cent of 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: 50 per cent 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 (62 per cent) and between six and 20 years (61 per cent).

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

**Table 4.10**      **Types of people perceived to be in poverty<sup>18</sup>**

Group	Perceived by (Base: 2,131)
	%
Unemployed people	45
Older people	24
Lone parents	16
Young people	16
People from low income families	11
Families with young children	14
People with physical or disabilities or mental health problems	8

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<sup>18</sup> Less than 5% perceived of respondents perceived other types of people to be in poverty. These have not been shown as there appeared to be no consensus.

## Summary of Key Findings

- 47 per cent of respondents felt that incomes had not changed in their local area over the past five years, while 49 per cent felt that income level had worsened.
- Of the 3,012 households who provided information about their income, 47 per cent of households had an annual income of less than £21,000, and 17 per cent had an annual income of less than £10,000.
- 60 per cent of households containing people aged 55 years or over were in receipt of a private, stakeholder or occupational pension.
- There was an increase in the proportion of respondents receiving benefits compared with both 2007 (23% more) and 2010 (5% more).
- 26 per cent of respondents would find it difficult to obtain £100 to meet an unexpected expense, and five per cent would find it impossible.
  - 44 per cent of households had savings of less than £1,000.
  - 32 per cent of respondents had a long-standing illness, disability or infirmity.
  - 85 per cent of households had a computer with a broadband connection.
  - Households without broadband tended to have low incomes and to have members that were economically inactive.
  - 61 per cent had a mobile telephone or similar device with access to the internet.
  - 57 per cent of respondents thought that there were people living in their area in poverty – this compares with 43 per cent in 2007 and 52 per cent in 2010.

### 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<sup>19</sup>. Relative deficiency in service provision may be exacerbated 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.

In 2013 the proportions that experienced difficulty accessing certain services were similar to 2010. Cinemas were cited by 37 per cent of respondents, police stations by 34 per cent, hospitals by 16 per cent and dental surgeries by 12 per cent. Other services cited included bank and building societies (17 per cent), leisure centres (15 per cent), social clubs (19 per cent), and petrol stations (12 per cent). However, the service that drew the largest proportion was a category introduced in 2013: 44 per cent of respondents had difficulties in accessing a growing space, such as an allotment.

There was differential access to key services to key health and retail services in rural Wales, such as

hospitals, GP and dental surgeries, supermarkets and petrol stations. Low income households were much more likely to experience difficulties in accessing these services. For example, 21 per cent of respondents with an annual household income of less than £21,000 had experienced difficulties in reaching their nearest hospital, compared with 11 per cent 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 displayed a similar pattern.

Not unexpectedly, 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. Noticeable geographical differences, particularly in terms of access to health services such as hospitals and dental surgeries, were also apparent when the figures were disaggregated by local authority area. For example, difficulties in accessing hospital services were more prevalent in the most rural areas of Wales, with 42 per cent of respondents in Powys reporting such problems, followed by Gwynedd (28 per cent) and Ceredigion (20 per cent), compared with Wrexham at eight per cent.

As also noted in the 2010 report, these results supported 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

<sup>19</sup> See WRO reports: Rural Services Surveys 2004-2013, Coping with Access to Services, Deep Rural Localities



certain parts of rural Wales, posed a major health service problem for respondents, who often had long journeys to their nearest hospital. For example, 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 requested 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	NH S	Policin g	Fire Servic e	Public Transpor t	School s	Food shop s	Post Offic e	Banks & building societie s	Communit y centre	Leisure facilitie s
	%	%	%	%	%	%	%	%	%	%
Good	66	46	71	46	71	60	76	66	56	58
Fair	26	34	12	26	11	25	16	19	18	20
Poor	7	13	1	21	3	10	6	9	6	9
No answer	<1	4	16	8	16	5	2	7	20	12

As Table 5.1 shows, apart from Policing and Public Transport, which both achieved 46 per cent, all services were rated as 'Good' by more than 50 per cent of respondents. These two services also had the most 'Poor' ratings, at 13 per cent and 21 per cent respectively.

### 5.3 Public Transport

Other WRO studies have indicated that there are perceived issues with public transport in rural Wales (issues included the lack of provision, unreliability, poor frequency, expense and inconvenience of public transport). Table 5.2 shows how people living in different types of localities in rural Wales rated public transport. The results from the 2007 and 2010 surveys 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	2013	2007	2010-11	2013	2007	2010-11	2013	2007	2010-11	2013
	%	%	%	%	%	%	%	%	%	%	%	%
Good	45	52	58	33	39	44	17	14	20	35	37	46
Fair	26	28	24	29	31	26	23	31	29	29	31	26
Poor	16	14	10	29	25	24	44	42	40	31	25	21
No answer	12	6	8	10	5	6	17	13	11	6	7	7

From the table, it is apparent that people living in properties or on farms in the countryside were less likely to rate public transport as 'Good' and more likely to rate it as 'Poor'.

Finally, in this section, respondents were asked questions about how services had improved, or not, over the last five years.

**Table 5.3 Perceptions of Service Improvement over time**

Over the last 5 years, have each of the following...	Improved a great deal	Improved a little	Not changed	Got a little worse	Got a lot worse
	%	%	%	%	%
The range of services and facilities available to people in your local area	3	12	63	15	7
Facilities for recreation and leisure within your local area	6	14	71	5	4

Results at Table 5.3 indicate that while it was perceived that the range of services available had tended to become worse over the five year period, facilities for recreation and leisure had slightly improved.

### **Summary of Key Findings**

- Low income households were more likely to experience difficulties in accessing key 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 (42 per cent), Gwynedd (28 per cent) and Ceredigion (20 per cent). While these were same areas as in 2010, the proportions that reported difficulties were considerably higher, apart from Gwynedd, which improved by one percentage point.
- Overall, public transport and policing caused the most concern.
- Overall, access to leisure and recreation facilities had improved.

### 6.1 Introduction

Since 2008 the dominant feature affecting rural Wales, together with the remainder of the UK, has been the recession. Other WRO work, such as the 2010 and 2013 Business surveys, the 2010 and 2013 Service surveys, and the 2010 Household survey, has highlighted the effects of the recession. Broadly, in terms of employment, economic recession means that fewer jobs are available.<sup>20</sup>

The 2013 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. This 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 4,002 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 and income.

Generally, the results for each category were of the same order as

those in 2010. There were lower proportions recorded for Full-time employed (5% percentage points lower), Part-time employed (two percentage points lower). There was an increase by two percentage points in Self-employed. Unemployed and Retired had also increased, by one percentage point and by three percentage points respectively.

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<sup>20</sup> Recession is usually defined as a contraction in GDP for six months (two consecutive quarters) or longer.

Table 6.1 Employment status of all respondents<sup>21</sup> by Gender, Age, Income and Social Class.

	Overall	Gender		Age			Annual Income				
		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
	%	%	%	%	%	%	%	%	%	%	%
<b>Count</b>	<b>4,002</b>	<b>1,766</b>	<b>2,236</b>	<b>565</b>	<b>1,311</b>	<b>2,127</b>	<b>513</b>	<b>902</b>	<b>655</b>	<b>548</b>	<b>394</b>
Full Time	30	35	26	48	50	13	4	21	39	56	59
Part Time	10	4	15	14	14	7	6	11	12	12	10
Self-employed	10	14	6	10	13	8	6	9	11	11	15
Govt Training	<1%	1	<1%	<1%	1	<1%	1	<1%	<1%	<1%	1
Full Time Education	2	1	2	8	1	<1%	1	3	1	<1%	1
Unemployed	3	2	3	7	4	1	8	2	2	2	1
Long term sick/disabled	4	4	4	2	6	3	14	3	2	1	<1%
Retired	36	36	36	<1%	1	65	53	45	30	16	11
Looking after home	4	1	6	7	6	1	5	4	3	2	1
Doing something else	2	2	2	1	2	<1%	3	3	<1%	1	<1%

<sup>21</sup> Note: 11 per cent of respondents had more than one paid job – as did six per cent of other household members.

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

	Count	Number retired from work
Main respondents	4,002	1,430
Other household members	3,858	868
<b>Total</b>	<b>7,860</b>	<b>2,298</b>
Total potentially eligible for employment: Respondents + Other household members - Total Retired = <b>5,562</b>		

The structure of the questionnaire, which requested information on other household members, enabled data to be collected on the employment status of up to five other household members aged over 16 years. For the 2013 survey, information was gathered on a total of 7,860 people: 4,002 main respondents and 3,858 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 5,562 respondents and household members eligible for employment. It also shows 2011 Census data for comparison.

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

	Count: 5,562	Proportion	Census 2011
		%	%
Full Time	2,528	45	40
Part Time	798	14	17
Self-employed	768	14	15
Govt Training	21	<1	
Full Time Education	558	10	11
Unemployed	240	4	5
Long term sick/disabled	298	5	6
Looking after home	224	4	4
Maternity leave	16	<1	
Doing something else	111	2	2
Don't know	6	<1	

From Table 6.3, it is apparent that rural Wales had an advantage of five percentage points over the Census figure in Full-time employment; a disadvantage of three percentage points in Part-time employment; and was down one percentage point in Self-employment. Taking these three types of employment together, rural Wales had 73 per cent of the survey in employment, compared with 72 per cent of the 2011 Census – practically parity.

Results in the other categories on Table 6.3 were also of a similar order to the Census.

#### 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 7,860 people in the responding households who qualified as ‘economically inactive’ was 48 per cent, which compared with 42 per cent on the 2010 survey: i.e. an increase of six percentage points.

#### 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.

Responses to these questions indicated that 2,005 respondents were not in employment at the time of the survey, plus a further 1,761 other household members: a total of 3,766. Thus, 48 per cent of the 7,860

people<sup>22</sup> surveyed were not in employment at the time the survey was carried out. The majority (88 per cent) of these individuals indicated that they had been in paid employment at some point in time.

#### 6.6 Employment sectors; Business sizes; and Travel to work

In order to obtain information on the types 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 on behalf of 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 7,416 individuals.

Table 6.4 shows the proportions for the principal categories of work type.

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<sup>22</sup> See Table 6.2

**Table 6.4 Employment categories**

Category	Count: 7,416	Category	Count: 7,416
	%		%
Agriculture, hunting & forestry	5	Public administration & defence	11
Mining & quarrying	1	Education	13
Manufacturing	8	Health & social work	14
Electricity, gas & water supply	2	IT	1
Construction	6	Cleaners/domestics	2
Wholesale and retail: repair of motor vehicles	14	Charity	1
Hotels and catering	4	Entertainment/media	2
Transport, storage & communications	4	Sports/leisure centres/sports coaching	1
Banks, building societies & financial services	3	Engineering / scientific/professional	3
Real estate, renting & business activities	3	Others	1

The proportions recorded for each employment category were similar to those of the 2007 and 2010 surveys. Agriculture, hunting and forestry remained at a low level and, taken together, Public Administration, Education, and Health and Social Work accounted for a high proportion of the employment of the survey sample, although their share in 2013 declined to 38 per cent compared with 42 per cent in 2010.

In order to assess the size of businesses that employed people in rural Wales, respondents were asked to describe their place of work, and that of other working members of the household, by choosing one of seven categories. The workplace details of 3,998 were acquired and the results are shown at Table 6.5.

These results aligned with statistics from the Census 2011 (e.g. in rural local authorities in Wales: Wholesale and retail: repair of motor vehicles - 16%; Health and social work - 15%; Education - 11%; Public admin and defence - 11%; Manufacturing = 8%; Agriculture, forestry and fishing = 4%<sup>23</sup>).

<sup>23</sup> Proportions calculated using Census 2011- Industry of employment



**Table 6.5 Size and type of workplace**

Category	Count: 3,998
	%
A small private enterprise employing less than 10 people	26
A small private enterprise employing 10 - 24 people	8
A medium private enterprise employing 25 – 100 people	9
A large private enterprise employing more than 100 people	20
A public sector body	34
A voluntary sector organization	2
Others	<1

The table shows that the largest employer was the public sector, which employed just over a third (34 per cent) of the survey sample<sup>24</sup>. This supports 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 and 2010, the second most common type of workplace was a small private enterprise employing less than 10 people (26 per cent), followed by a large private enterprise employing more than 100 people (20 per cent).

Respondents who were in employment were asked to provide the distances that they travelled to work. Table 6.6 displays these results and Table 6.7 factors-in household income.

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<sup>24</sup> WG produce stats on public sector employment in Wales (shown to be 28%). For further details - <http://wales.gov.uk/statistics-and-research/business-register-employment-survey/?lang=en>

**Table 6.6 Distance travelled to work**

Distance from place of work	Count: 1,993
	%
Work at or from home	12
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	7

Table 6.7 reveals 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, 23 per cent of those with a household income of less than £10,000 worked from home compared with 12 per cent of those respondents with an income of £52,000 or more.

Additionally, 36 per cent of respondents who earned less than £10,000 per annum travelled less than five miles to work, compared with 21 per cent of the highest income group (£52,000 or more per annum). Two per cent of the lowest income group travelled more than 50 miles to work compared with seven per cent of respondents in the highest income group.

It is surprising that more of the higher-income respondents did not work from home, given the high incidence of Broadband. This could be because their main working locations were at a distance but also worked from home quite often, a second work location.

One might speculate that there may be a turn-around in working-from-home patterns as Broadband enables many administrative and ‘brain-work’ tasks to be done at home. Higher income rural dwellers may then work from home more frequently. Indeed, improvements in Broadband access may stimulate in-migration of higher-income households to rural Wales, attracted by the potential for working from home. More research is needed on these important issues.

**Table 6.7 Distance travelled to work and annual household income**

	Less than £10,000 per	£10,000 to £20,999	£21,000 to £30,999	£31,000 to £51,999	£52,000 or more
	%	%	%	%	%
Work at or from home	23	13	11	9	12
Less than 5 miles from home	36	38	32	26	21
Between 5-10 miles from home	17	18	22	19	21
Between 11-20 miles from home	12	15	18	24	17
Between 21-49 miles from home	<1	5	11	16	15
50 or more miles from home	2	1	2	1	7
No fixed place of work	9	10	5	5	6

**Table 6.8 Mode of transport to work**

Mode of transport	Count: 1,745
	%
Household owned motorised transport	81
Another person's motorised transport	7
Bus	6
Train	3
On foot	13
Bicycle	4
Other	1

Data, at Table 6.8, on modes of transport to work indicate that the majority (81 per cent) used their personal motor vehicles to travel to work, while relatively few respondents used public transport<sup>25</sup>.

### 6.7 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. In response, 32 per cent reported difficulties in finding employment in their local area. This result was similar to 2010 when 31 per cent experienced difficulties.

When asked whether the range of employment opportunities available in the local area had improved or become worse over the last few years, half believed that the situation had deteriorated; a third had not seen any noticeable change; only four per cent stated that it had improved; and a further 13 per cent were unsure. In terms of age, 46 per cent of respondents aged between 16 and 34 indicated that they had experienced difficulties in finding work in their local area in recent years. These results were similar to 2010.

The proportion of respondents who indicated that they had experienced difficulty in finding employment in each

local authority area ranged between 29 per cent for both Monmouthshire and the Vale of Glamorgan to 40 per cent for Gwynedd.

The two principal difficulties experienced by respondents looking for work were, firstly, that there was a noticeable shortage of suitable jobs (49 per cent) and secondly, that there were not enough jobs available in general (41 per cent). 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.

From the last three WRO Household surveys, it is apparent that over time and concurrent with the recession there has been an increase in the proportions of respondents who indicated that they had experienced difficulties in finding work. The proportions were 24 per cent in 2004, 31 per cent in 2010, and 32 per cent in 2013.

<sup>25</sup> See Section 5 and the WRO Services Surveys for information regarding the provision of public transport in rural Wales.

## Summary of Key Findings

- 50 per cent of all respondents were in employment (full-time, part-time or in self-employment) and 36 per cent were retired. Of the remainder, two per cent were in full-time education, three per cent were unemployed, four per cent were registered as long-term sick or disabled, and four per cent indicated that they looked after the home.
- The distribution of employment sectors across rural households was broadly similar to the results for the previous surveys in 2007 and 2010.
- A high proportion of households was employed in public administration and defence, education, and health and social work – although there was a decrease from 42 per cent in 2010 to 38 per cent in 2013.
- 18 per cent of respondents were employed in wholesale and retail, transport, and hotels and catering; eight per cent were employed in manufacturing; and six per cent in the construction industry - the figure for the agriculture, hunting and forestry sectors remained low at five per cent.
- 12 per cent of respondents worked from home; 50 per cent of all respondents worked less than 10 miles from home; 17 per cent travelled between 11-20 miles; 11 per cent travelled between 21-49 miles; and three per cent travelled more than 50 miles.
- 46 per cent 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

The observations made in the 2010 report regarding the relationships between the recession, environmental concern and people in rural Wales still pertain. That is, 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 are potentially important 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 Surveys of 2007 and 2010.

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: 4,002
	%
Improved a great deal	6
Improved a little	16
Not changed	65
Got a little worse	7
Got a lot worse	4
Don't know	2

There had been a steady decline over time in the proportions of respondents that perceived improvements in the natural

environment: 32 per cent in 2007 – 25 per cent in 2010 – 22 per cent in 2013.

As agriculture remains a prominent feature of the rural environment, respondents

were asked for their perceptions of the state of local agriculture. Results are displayed at Table 7.3.

**Table 7.3 Perceptions of change in the state of local agriculture**

Response	Count: 4,002
	%
Improved a great deal	2
Improved a little	5
Not changed	48
Got a little worse	12
Got a lot worse	10
Don't know	23

Perceptions of the state of local agriculture showed little variation across gender, age groups, income groups. However, there was variation in location, particularly, and

unsurprisingly, for people living on a farm or in a property in the countryside. Table 7.4 shows these results.

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

Count: 4,002	Town	Village	Farm or property in the countryside	Mixture
	%	%	%	%
Improved a great deal	1	2	2	2
Improved a little	4	5	9	12
Not changed	46	52	40	47
Got a little worse	11	11	19	12
Got a lot worse	8	8	21	6
Don't know	30	22	9	20

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: 11 per cent perceived improvement compared to the overall figure of 7 per cent (Table 7.3), but 40 per cent perceived that the state of local agriculture had deteriorated, compared with an overall figure of 21 per cent (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 4,002 respondents. The most well-known were Communities First (familiar to 49 per cent of respondents) and the Rural

Development Programme (38 per cent). Only six per cent were aware of Leader and its successors. However, relatively large proportions were aware of the Broadband Support Scheme (26 per cent) and the Economic Renewal Programme (20 per cent).

With regard to awareness of any services, facilities or projects funded by these initiatives, Communities First stood out, with 31 per cent aware. Awareness of the outcomes of the other initiatives ranged around 20 per cent.

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

Policy Initiative	Aware of Initiative (Count)	Proportion of total (4,002)	Aware of service, facility or project (Count)	Proportion of those aware of initiative
		%		%
Rural Development Programme	1,525	38	265	17
Axes 3 and 4 of the Rural Development Programme (formerly LEADER)	251	6	57	23
Convergence Programme for West Wales and the Valleys (successor to the Objective 1 programme 2000-2006) <sup>26</sup>	481	12	108	22
Communities First	1,952	49	604	31
Broadband Support Scheme	1,048	26	254	24
Economic Renewal Programme	780	20	130	17

<sup>26</sup> Note that not all of the respondents would have been living in local authorities that fell in the Convergence area for Structural Funds

## 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.

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

Response	2007 Count: 4071	2010 Count: 4,062	2013 Count: 4,002
	%	%	%
A great amount	45	40	38
A fair amount	35	38	38
A little	12	14	14
Not at all	7	7	10
Don't know	1	1	<1

Table 7.6 tends to confirm the general, if slight decline, in environmental concern observed in the 2010 report. However, it remained the case that environmental

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, which also shows the 2007 and 2010 results for comparison.

concerns greatly influenced rural households, with 76 per cent of the survey population indicating that they thought a great or fair amount about recycling or reducing household energy use. Only 10 per cent 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: 4,002)	Have	Considering	Not Considering	Don't know
	%	%	%	%
Loft insulation	87	3	10	1
Double glazing	91	3	6	<1
Solar panels	6	17	76	1
A wind turbine	<1	9	90	1
Cavity wall insulation	54	4	39	3
Energy-saving light bulbs	95	1	4	<1

Double glazing was the most popular conservation measure at a high per cent of the survey. The numerous grants available for loft insulation means it is considered both a cheap and effective method of energy saving and this was

reflected in the high proportion of respondents (87 per cent) who had loft insulation in their household. However, 13 per cent of households indicated that they did not have loft insulation and 10 per cent were not even considering it. It may have



been the case that it was not possible to insulate some of these lofts.

Household tenure appeared to have a considerable influence on the use of loft insulation: 91 per cent of respondents who owned their own property had insulated their lofts, compared with 78 per cent 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 per cent for the lowest income group and rose to 90 per cent for the highest income group.

As noted above, double glazing continued to be more popular than loft insulation, which was also the case in 2007 and 2010. In terms of tenure, 94 per cent of home owners had double glazing compared with 86 per cent of non-owners. Double glazing and income were positively correlated with the range starting at 87 per cent for the lowest income group and rising to 93 per cent for the highest income group.

Cavity wall insulation was the third commonly used method of domestic energy-saving, following loft insulation and double glazing. Across the survey, 54 per cent of respondents stated that their households had cavity wall insulation. However, at 39 per cent, a relatively high proportion of households indicated that they were 'not considering' cavity wall insulation. This might reflect the high proportion of older properties with solid, non-cavity, stone walls found in rural areas. Cavity wall insulation installation was fairly even across household income groups and household tenure: 56 per cent of home owners had cavity wall insulation compared with 55 per cent of non-owners.

Energy saving light bulbs were used by 95 per cent of the survey population. Given that tungsten filament light bulbs have not been sold for some time, the fact that this figure was the same as in the 2010 report suggests that household stocks of these tungsten filament light bulbs had not yet been exhausted or it is a testament to their longevity.

As noted in the 2010 report, solar panels and wind turbines are relatively expensive in terms of capital outlay and may also be subject to planning regulations, and climatic and geographical location requirements. Although relatively few respondents were operating either of these energy production installations, numbers had increased since 2010. In the case of solar panels, this increase was three percentage points to six per cent of households surveyed, which was more than one in 20 households.

## 7.5 Recycling

Responses to questions about the provision of recycling services in respondents' local areas are shown at Table 7.8. The salient point here was the general increase, since 2010, in the provision of 'Separate collection of green waste' (74 per cent in 2010 compared with 86 per cent in 2013). However, use of this recycling facility had declined from 86 per cent in 2010 to 81 per cent in 2013. In the 2010 report it was suggested that respondents who composted green waste for garden use might not use green waste collection. This might account for the lower usage rates for the service and suggests that more households were gardening and 'growing their own'.

With regard to the two 'home collection' services (recycling collection and green waste collection) 'farms and properties in the countryside were the worst served: 64 per cent of properties in the countryside reported that they received green waste collections, compared with 90 per cent in towns. In addition, 93 per cent of respondents who lived in properties in the open countryside had recycling collections from home, compared with 96 per cent 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	95	85	89	88
Not provided	5	14	10	10
Don't know	<1	1	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	3,811	3,381	4,000	4,000
	%	%	%	%
Use	96	81	68	77
Don't use	4	19	32	23

While across the four types of service, Table 7.9 indicates high rates of use, there had been a decline in use since 2010 apart from the 'Recycling collection from home'. The case of 'separate household collection of green waste' is discussed above. A decline in use for the two 'site based' facilities is reasonable: it implies that people did not have to leave their premises to recycle their waste. However, relatively high proportions still used public access recycling facilities. Perhaps there was insufficient capacity in their home recycling containers.

## 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 majority (86 per cent) of households surveyed indicating that they owned, or had access to a motor vehicle.

With such a high proportion of ownership it was difficult to identify obvious determinants. However, while in some cases the results were similar to 2010, there were differences.

Only 58 per cent of those households with an annual income of less than £10,000 had a motor vehicle, compared with 73 per cent in 2010. Similarly, there was a decline in vehicle ownership for respondents with an annual income of between £10,000 and £20,999; from 90 per cent in 2010 to 81 per cent in 2013. These represented large declines and might have been associated with the recession. Vehicle ownership remained high in the remaining income categories (over £21,000 through to those households with annual incomes of over £52,000) and ranged from 96 per cent to 100 per cent.

Of those 3,446 households with a motor vehicle, 47 per cent owned one; 38 per cent owned two; and 15 per cent had three or more. Again, the results were similar to 2010 and revealed positive

correlations between multiple vehicle ownership and rising income.

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, Table 7.10 reveals that households living on farms or in a property in the country were the group most likely to have higher annual mileages. For example, 36 per cent of households in this group had an annual mileage of more than 20,000 miles compared with 20 per cent of those households in a town or city and 29 per cent of those households in a village. There was a slight trend for increased use in the country and less use by households in rural towns.

Analysis also revealed positive correlations between high annual mileage and those in work and income. Of those respondents with annual household incomes of less than £10,000, only nine per cent had an annual mileage of more than 20,000 miles compared with 59 per cent of those with a household income of £52,000 or more. As in 2010, there was a step change, although slightly less pronounced, 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 23 per cent and 39 per cent respectively.

**Table 7.10: Annual household mileage**

Annual mileage	Count: 3,446
	%
Less than 1,000 miles	3
1000 – 1999	4
2000 – 2999	4
3000 – 4999	8
5000 – 9999	22
10,000 – 14,999	18
15,000 – 19,999	12
20,000 or higher	25
Don't know	6

Finally, all 4,002 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**

<b>Response</b>	<b>2007 (Count: 4,071)</b>	<b>2010-11 (Count: 4,062)</b>	<b>2013 (Count: 4,002)</b>
	%	%	%
Increased greatly	19	19	20
Increased slightly	15	14	13
About the same	57	58	58
Decreased slightly	5	4	4
Decreased greatly	4	4	5

In general, there was a continuing strong dependency on personal motorised transport, although dependency had decreased by a small amount since 2010. However, while the majority of respondents perceived that their

household's dependency on motorised transport had remained relatively stable, almost four times as many perceived that it had increased than perceived that it had decreased – 33 per cent and nine per cent respectively.

## Summary of Key Findings

- 22 per cent of respondents thought the quality of the local natural environment had improved to some degree in the last five years – a steady decline since 2007. Five per cent perceived no change.
- When questioned about the state of local agriculture, 22 per cent of respondents stated that it had worsened and seven per cent felt that it had improved.
- 49 per cent of all respondents were aware of the Communities First programme and six per cent had heard of the Rural Development Programme. 26 per cent and 20 per cent respectively were aware of the Broadband Support Scheme and the Economic Renewal Programme.
- The decline in environmental consciousness observed in 2010 continued.
- 86 per cent of households surveyed owned or had access to a motor vehicle.
- Of those households with a motor vehicle, 47 per cent owned one, 38 per cent owned two, and 15 per cent had three or more.
- Only 56 per cent of those households with an annual income of less than £10,000 had a motor vehicle – a considerable decline of 15 percentage points since 2010.
- 25 per cent of households had an annual mileage of more than 20,000.
- 33 per cent stated that their household's dependency on motorised transport had increased; 57 per cent indicated that their dependency had remained relatively stable; and 10 per cent that their dependency on a motorised vehicle had decreased.
- The provision of home collections for both recycling and separate green waste collection had increased since 2010. Consequently, the use of public access recycling sites had decreased slightly.
- The use of home collection for separate green waste had declined since 2010 (provision had increased). Were more households gardening, 'growing their own' and composting their green waste?