



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

A REPORT ON LIVING AND WORKING IN RURAL WALES

September 2004



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EXECUTIVE SUMMARY

Introduction and methodology

This report provides a range of baseline data on living and working in rural Wales. It examines demography, household structure, housing, community and social exclusion, key services, employment, income and expenditure, the Welsh language and attitudes to the countryside.

The report presents key findings on these issues for rural Wales as a whole. It also explores variations across rural Wales according to geography, rurality, age, gender, income, class, ethnicity, Welsh language, household tenure and length of residence.

The report was produced by the Wales Rural Observatory. It is one of four national research projects providing data on rural Wales that will inform the work of the Welsh Assembly Government's Rural Policy Division.

Data were gathered through a telephone survey of 4023 households across rural Wales. It incorporates at least 9904 people.

Respondents were asked about themselves, the household overall and other individuals within the household.

The survey covers all rural settlement types. There is proportional representation of 11 of the 12 Unitary Authorities deemed as covering rural Wales.

KEY FINDINGS

Population and migration

- Over half of all households in rural Wales comprise two or fewer people.
 - Sixty percent of households have family members living within ten miles.
- A quarter of respondents have lived in their current home for more than 20 years.
 - The most stable demographic group is the elderly; also less prone to move than others are Welsh speakers and people who consider their ethnicity as Welsh. Respondents from the counties of Anglesey, Carmarthenshire, Ceredigion, Denbighshire, Powys and Pembrokeshire appear to be less prone to move than others.
- Employment is the most common factor influencing decisions to move into rural Wales or to relocate within rural Wales.
 - Six-times more women have moved for their partner to get work, than men have for their partner.
- Half of those living in rural Wales consider themselves as Welsh.
 - Younger respondents are more likely to define themselves as Welsh.

- A fifth of all household members included in the survey speak Welsh fluently.
 - Knowledge and use of Welsh varies significantly across rural Wales. The proportion of fluent Welsh speakers is more than 20 times higher in Gwynedd than it is Monmouthshire.

Housing

- Forty-two percent of respondents own their property outright.
 - Seven percent of respondents rent from private landlords.
- Social housing' accounts for 9% of the housing market.
 - In Anglesey, respondents are three times more likely to occupy social housing than those in the Vale of Glamorgan
- Forty-two percent of respondents consider that 'most' people in their local area face problems buying or renting affordable housing.
 - This perception is most marked amongst younger people who are not property owners.
- Less than a fifth of those who wish to move cite shortage of affordable housing as a barrier to moving.
 - Shortage of affordable housing appears to be more acute in North Wales. In Flintshire, 21% of those who wish to move are prevented from doing so as a result of inability to afford property.
- Twelve percent of households consider that the provision of new housing has led to debate or conflict in the local area.
 - Welsh-speakers and those who define their ethnicity as Welsh are more prone to voice concern about such issues.

Community well-being and social exclusion

- Half of respondents state that they are not involved with any activities organised by local groups and societies.
 - Engagement with town / community councils and with 'community groups' is higher amongst more established residents.
- 28% of respondents have attended a public meeting in the last year.
 - Respondents who speak Welsh fluently are more likely to have attended a public meeting, done voluntary work, signed a petition, provided care, completed a survey from a council or community group and voted in the 2003 National Assembly election.

- Thirty-five percent of respondents have done voluntary work for charity or other organisations over the last twelve months.
 - Lower to middle income household respondents are more likely to have provided care for neighbours or friends.
- Fifteen percent of respondents feel that they do not know many people in their local community.
 - Longer-established residents are more likely to consider themselves a member of their local community and to know many people in that community.
- The majority of rural residents appear to be generally very satisfied with the ‘spirit of community’ in their local area.
 - Respondents from Monmouthshire are more likely than respondents from any other county to perceive their communities in negative terms. Respondents from Ceredigion, Powys and Pembrokeshire are more likely than others to perceive their communities in positive terms.
- Forty percent of respondents feel that there are people in their community living in poverty.
 - Those who feel that there is poverty in their locality are far more likely to be living in a rural town than either a village or the open countryside.

Rural services

- Forty-nine percent of respondents say that there is someone in their household who has problems getting to key services.
 - Income is the defining household characteristic that significantly influences relative ability to access services in rural areas.
- Eleven percent of households are without access to a car.
 - Thirty-two percent of households with a gross annual income of less than £10,000 do not have the use of a car, compared to less than 3% of households with a gross annual income of £21,000 or more.
- At most, half of respondents consider that leisure facilities, policing, community centres and public transport, in their area are of ‘good’ quality.
 - Respondents from Powys are almost four times as likely than respondents from Conwy to think that public transport in their area is of ‘poor’ quality.
- Over two-thirds of respondents think that the standard of schools, post offices, banks, food shops and the NHS is generally ‘good’ in their local area.
 - Conwy and Glamorgan are relatively ‘good’ across more services than most and Powys and Monmouthshire are relatively ‘bad’ across more services than most.

Employment and the economy

- Seventeen percent of respondents state that they have no academic qualifications.
 - Respondents from Carmarthenshire, Anglesey, Conwy and Denbighshire are almost twice as likely than respondents from Monmouthshire and the Vale of Glamorgan to have no educational qualifications.
- Just over 3% of respondents excluding retirees define themselves as unemployed and available for work.
 - Respondents in hamlets and open countryside are less likely than respondents from other rural areas to be unemployed.
- Twenty-five percent of economically-active respondents report that they have found it difficult to find a suitable job in their local area.
 - Younger respondents (aged 16-34) are almost twice as likely than older respondents (aged 35-64) to report difficulties.
- Of those respondents currently in paid employment, 63% have a full-time job, 19% have part-time job and 18% are self-employed.
 - Women are over four times more likely than men to work part-time.
- Forty-four percent of those in work are employed in public administration, education or health and social work.
 - Public administration, education and health and social work accounts for a similar proportion of employment across rural Wales.
- Taking into account all respondents either currently in paid employment or previously in paid employment, agriculture, hunting and forestry account for 6% of jobs across rural Wales.
 - The contribution of agriculture, hunting and forestry to the employment base in rural areas ranges from 2% in Conwy and the Vale of Glamorgan to 7% in Ceredigion.
- The majority of rural residents in paid employment work within or close to their place of residence, although 31% of respondents work more than ten miles from their home.
 - Those from households on lower incomes are far more likely to work a relatively short distance from home compared to those from households with higher incomes.

Attitudes to rural Wales

- New housing development is the issue considered to cause most widespread concern across rural Wales.
 - Welsh-speakers and those in the highest income band are most likely to perceive this as a problem.

- Over half of respondents consider that new development in rural areas should be concentrated in existing towns (63%) and / or on the edge of towns (59%).
 - Respondents from households with higher income and from a higher social class are more likely to favour development in rural areas.
- A fifth of respondents like living in rural Wales because of the ‘friendliness of people / nice neighbours’.
 - This issue appears to be particularly significant for those over 65, over a quarter of whom like living in rural Wales because of the people.
- Over a third of respondents did not identify any negative perceptions regarding living in rural Wales.
 - Of those who do express ‘dislikes’, most issues relate to planning and development. New housing development is considered to cause most widespread concern, cited by 12% of respondents. Welsh speakers and those in households earning over £31,000 per year are more likely to perceive new housing as a problem.
- Forty-four percent of people’s dislikes relate to perceptions of a poor quality of services, an unfavourable economy and the high cost of living.
 - Dissatisfaction is significantly higher in the more remote counties of Ceredigion, Powys, Pembrokeshire and Gwynedd.

SECTION 1

INTRODUCTION

1.1 This report provides a range of baseline data on living and working in rural Wales. It examines demography, household structure, housing, community well-being and social exclusion, key services, employment, income and household expenditure, the Welsh language and attitudes to the countryside.

1.2 The report presents key findings on these issues for rural Wales as a whole. It also explores variations across rural Wales according to geography, rurality, age, gender, income, class, ethnicity, Welsh language, household tenure and length of residence.

1.3 The report was produced by the Wales Rural Observatory. It is one of four national research projects providing data on rural Wales that will inform the work of the Welsh Assembly Government's Rural Policy Division.

The Wales Rural Observatory

1.4 The Wales Rural Observatory undertakes independent research and analysis on rural Wales. It is funded by the Welsh Assembly Government and supports evidence-based policy-making. Its work commenced in September 2003 and is scheduled to be completed in March 2006.

1.5 The Observatory consists of a team of specialist rural researchers based at the School for City and Regional Planning, Cardiff University and the Institute of Geography and Earth Sciences, University of Wales, Aberystwyth.

1.6 The Observatory's activities are focused on four main areas:

- Collecting and analysing a wide range of social and economic data on rural Wales
- Presenting these data within a Geographical Information System (GIS)
- Producing a series of evaluative research reports
- Reviewing other research and policy evidence relating to rural Wales

1.7 A website providing information about the Observatory and its major activities and outputs can be accessed at www.walesruralobservatory.org.uk.

Methodology

1.8 Data were gathered through a telephone survey of 4023 households across rural Wales, covering at least 9904 people. The survey was carried out between 1st March and 18th April 2004.

1.9 The survey was designed by the Wales Rural Observatory. It was carried out for the Observatory by NOP Social and Political, part of NOP World, who also collated and provided preliminary cross-tabulation of the data. The data was analysed by Dr Bill Edwards, Dr Michael Woods, Dr Graham Gardner and Catherine Walkley at the University of Wales, Aberystwyth.

1.10 Telephone interviews contained 70 questions and lasted up to 30 minutes. Interviews were conducted in either English or Welsh.

1.11 Respondents were asked about themselves, the household overall and other individuals within the household. The majority of questions required respondents to agree or disagree with a series of attitudinal statements or to provide factual data such as household income and membership of local organizations. The survey also included several open-ended questions, focusing on perceptions of the local area.

1.12 The survey sample is evenly balanced on the basis of gender: 48% of the population are male, 52% are female. The survey was aimed at householders and covers those aged 16 and above.

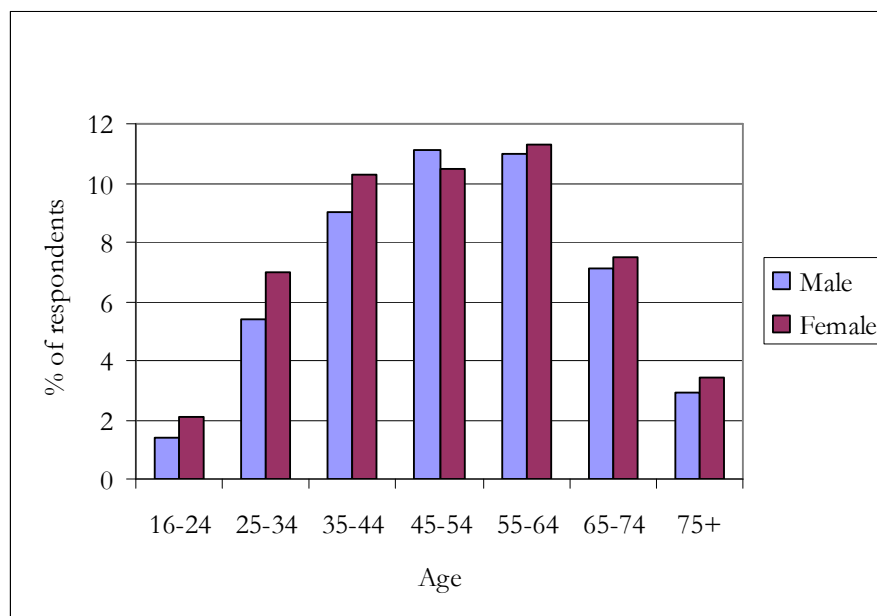
1.13 The survey covers all rural settlement types. Thirty-four percent of responses are from towns, 48% from villages and 18% from remoter areas. There is proportional representation of 11 of the 12 Unitary Authorities covering rural Wales (see Table 1.1. for details). The survey includes the nine predominantly rural authorities (Anglesey, Carmarthenshire, Ceredigion, Conwy, Denbighshire, Gwynedd, Pembrokeshire, Powys and Monmouthshire) and two of the three predominantly urban authorities that contain rural areas (Flintshire and the Vale of Glamorgan). It excludes Wrexham¹.

Table 1.1 Distribution of respondents by geography and rurality

| | Number of respondents | % of total respondents |
|------------------------------|------------------------------|-------------------------------|
| <i>Total respondents</i> | <i>4023</i> | <i>100</i> |
| Towns | 1349 | 34 |
| Villages | 1935 | 48 |
| Hamlets and open countryside | 733 | 18 |
| | | |
| Anglesey | 274 | 6.8 |
| Carmarthenshire | 572 | 14.2 |
| Ceredigion | 332 | 8.3 |
| Conwy | 457 | 11.4 |
| Denbighshire | 355 | 8.8 |
| Gwynedd | 458 | 11.4 |
| Pembrokeshire | 459 | 11.4 |
| Powys | 468 | 11.6 |
| Monmouthshire | 302 | 7.5 |
| Flintshire | 161 | 4.0 |
| Vale of Glamorgan | 139 | 3.5 |

¹ The relatively low number of rural residents in Wrexham made it unfeasible to obtain a representative sample from this partially 'rural' county.

Figure 1.1 Population of sample by age and gender



Survey of living and working in rural Wales: report structure

1.14 This report has seven sections, including the introduction and methodology (**Section 1**). **Section 2** focuses on the diverse and changing population of rural Wales, with particular emphasis on demography, migration, ethnicity, and use of the Welsh language. **Section 3** assesses the current housing situation in rural Wales, giving particular consideration to the influence of age, income, ethnicity and ability to use of the Welsh language, as well as differences between rural areas. **Section 4** explores community and social exclusion, including involvement in community activities, wider civic participation, perceptions of community life and indicators of material disadvantage. **Section 5** outlines the experiences and perceptions of rural residents regarding the provision of services in their local area, problems of access to services and the quality of the services provided. **Section 6** examines the nature of employment and characteristics of the workforce in rural Wales. **Section 7** explores attitudes to living in rural Wales, with a particular focus on how the demographic and socio-economic characteristics of respondents, along with geography and rurality, influence perceptions and opinions.

SECTION 2

POPULATION AND MIGRATION

Understanding the diverse and changing population of rural Wales is central to understanding the Welsh countryside. Since the end of the second world war rural depopulation has become of increasing concern. At the same time, since the 1970s there has been a 'population turnaround' with substantial and sustained migration from cities and larger towns into rural areas. Some parts of the countryside are amongst the fastest growing in Wales, while others are still undergoing population decline. There has been much speculation on the reasons for both in- and out-migration, and on the consequences of population recomposition for cultural identity and the survival of the Welsh language in rural Wales.

This section outlines the nature of the rural population in Wales, with particular emphasis on key patterns of migration in and out of rural areas, the characteristics of migrants, their motives for moving and the implications of these flows on rural areas. It focuses on:

- Demography
- Ethnicity and cultural identity
- In-migration
- Out-migration
- Use of the Welsh language

Key findings are provided at the end of the chapter.

Household structure

2.1 The survey indicates that over half of all households in rural Wales comprise two or fewer people. Almost a quarter of households covered by the survey are single-person. Over a third normally have two people resident. Seven percent have five or more people.

2.2 Respondents from single person households are more likely than not to be based in towns, contain inhabitants of retirement age and have a household income of less than £10,000.

2.3 Most households containing two or more people are comprised of family members rather than other associations. Ninety-nine percent of multi-person households involve people living with family members, spouses or unmarried partners.

2.4 Four percent of householders live with their mother and / or father. This is more marked for respondents who define their ethnicity as Welsh.

2.5 There is a marked proximity of other family members in rural Wales. The survey indicates that 30% of households have other family members, excluding those in their property, living within a mile. Sixty percent of households have family within ten miles. Those in towns are more likely to have family living within 10 miles, compared to those in hamlets or open countryside, whilst lower income households are more likely to have family living close by.

2.6 Overall, three quarters of those of Welsh ethnicity have family within 10 miles, whereas less than half of those who define their ethnicity as English have such geographically proximate family networks. These numbers vary between different rural areas, however. Family networks appear to be geographically most concentrated in Carmarthenshire and Flintshire, where 2 out of every 3 households have relations living within 10 miles, and least concentrated in Monmouthshire, where half of households have family within the same distance.

Length of residence

2.7 There is evidence of considerable population stability in rural Wales. A quarter of respondents have lived in their current home for more than 20 years. Nine percent have always lived in their present home.

2.8 The most stable demographic group is the elderly, almost half of those aged 65 or over have lived in the same property for 20 years or more. Also less prone to move than others are Welsh speakers and people who consider their ethnicity as Welsh. There is greater stability amongst those who live in a hamlet or open countryside. Respondents from the counties of Anglesey, Carmarthenshire, Ceredigion, Denbighshire, Powys and Pembrokeshire appear to be less prone to move than others.

2.9 Alongside this pattern of stability there is also considerable flux. Seventeen percent of respondents have lived in their home for less than two years and 9% for less than one year. Those aged under 35 are five times more likely than respondents aged over 65 to have lived in their current property for less than a year.

2.10 The survey provides evidence of significant in-migration to rural Wales. A significant proportion of respondents have not always lived in rural areas: 23% define the place in which they have spent most of their life as a major town or city. Of this 23% over half are now based in a village, hamlet or the open countryside. Over 40% of those currently living in more rural areas (a hamlet or in open countryside) previously lived in a town or city. The survey results thus reflect a relatively widespread movement from urban to rural areas.

2.11 A quarter of respondents have spent most of their life in England, in particular from the North-West and London areas. People from Northern England are more likely to move to North Wales than elsewhere in rural Wales, whilst it is more common for those from the West Midlands to move into areas of East Wales, such as Powys.

2.12 In-migrants who have spent most of their life in Wales are more likely to live in rural towns (self-defined). In-migrants from England are more likely to live in hamlets and open countryside.

2.13 Twenty-two percent of households have had someone move out in the last five years. Of these, half have remained in rural Wales. Ten percent have moved to urban areas of Wales. A third of leavers have moved outside of Wales.

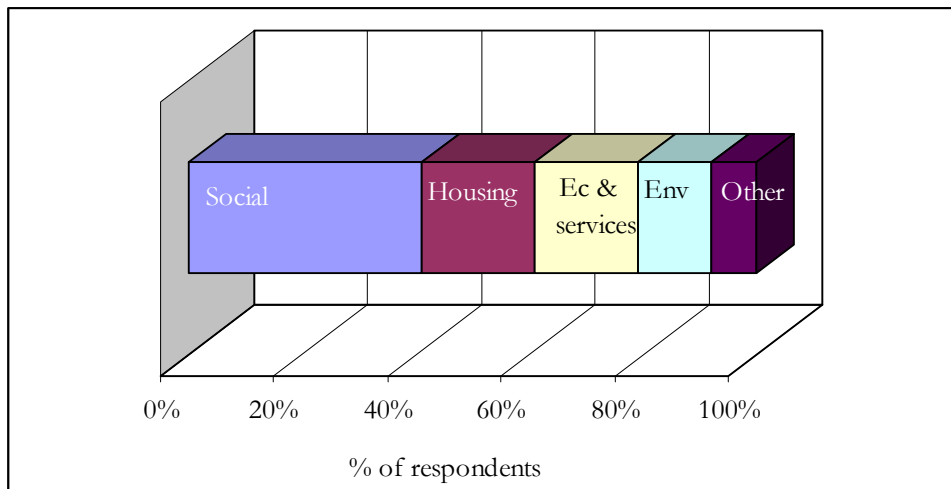
Migration patterns and reasons for migration

2.14 Answers to the open-response question ‘why did you move into your current home?’ reveal that people’s motives for moving to their current property are wide-ranging. ‘Pull’ factors, such as the desire to move to a better property or to a better environment, are the most common motives. ‘Push’ factors, which relate to respondents’ reasons for moving away from their previous place of residence, are less significant.

2.15 A distinction can be made between those whose motives for moving into their current home relate to *property* and /or living arrangements, and those whose motives relate to *location*. It cannot be assumed that someone moving into a property in rural Wales is motivated predominantly by locality; wider lifestyle factors are also important.

2.16 Motives for moving can be divided into four categories: first, social factors, such as changing family circumstances, leisure interests of the household and respondents returning to areas in which they have previously lived; second, issues relating to housing, particularly moving to a more appropriate property; third, economic motivations, including for employment and improved quality of services; and fourth, environmental factors. (See Figure 2.1.)

Figure 2.1 Reasons why respondents moved into their current home



2.17 Social motivations predominate, with a third of respondents mentioning setting up home with a partner or spouse, wanting to be closer to family or friends and moving out of a parental home. Seven percent of respondents have moved into their current property because of retirement.

2.18 The survey suggests that employment is the most common factor influencing decisions to move. Seventeen percent of respondents have moved in to their current home in order for themselves or their partner to get employment. The results reveal that six-times more women have moved for their partner to get work, than men have for their partner.

2.19 Geographical disaggregation of the data reveals significant differences between counties regarding migration for reasons of employment. People living in Monmouthshire, for example, are three-times more likely to have moved there for employment than those who live on Anglesey. This suggests that some counties are

considerably more attractive than others when it comes to individuals seeking employment.

2.20 People who define themselves as Welsh are twice as likely than those who define themselves as English to have moved to their current property in order to set up home with a partner or spouse. Respondents who consider themselves as English are 44% more likely than Welsh respondents to have moved in order to benefit from a better environment.

2.21 Although these results do not take into account respondents' previous place of residence, they might suggest that those moving into rural Wales from outside are more motivated by location than their changing personal circumstances. In contrast, those who have moved within rural Wales may be more likely to cite issues that relate to their changing personal situation.

2.22 There are three main reasons why people have moved out of a household. Most common (31% of leavers) is setting up home elsewhere; this includes moving in with a partner. A quarter of those who have left the household have done so in order to find employment; one in five have left for education or training. It is likely that many of these out-migrants are young adults.

2.23 Almost one fifth of households include at least one member who has returned to live in rural Wales after living somewhere else. Welsh people, Welsh speakers, those with higher incomes and of higher social class are more likely to return. The extent to which those who have moved away for reasons of education intend to return, and actually do return, is not clear.

Welsh identity

2.24 Only half of those living in rural Wales consider themselves as Welsh. Thirty percent see themselves as British, 15% English. The traditional 'heartlands' of rural Wales have a stronger representation of 'Welsh' people, particularly Carmarthenshire (66%) and Gwynedd (55%). In contrast, a fifth of respondents from Denbighshire consider themselves to be English.

2.25 There is a correlation between age and self-defined ethnicity. Younger respondents are more likely to define themselves as Welsh, as are a greater proportion of those who have lived longer in their current place of residence. One in five of those aged over 64 define themselves as English; it is likely that at least some of these have moved from England to rural Wales for retirement.

Welsh language

2.26 A fifth of all household members included in the survey speak Welsh fluently, with this proportion increasing to a third when it also includes those who consider they can speak the language 'quite well'. A third can speak a few sentences or a few words. One in three people cannot speak any Welsh.

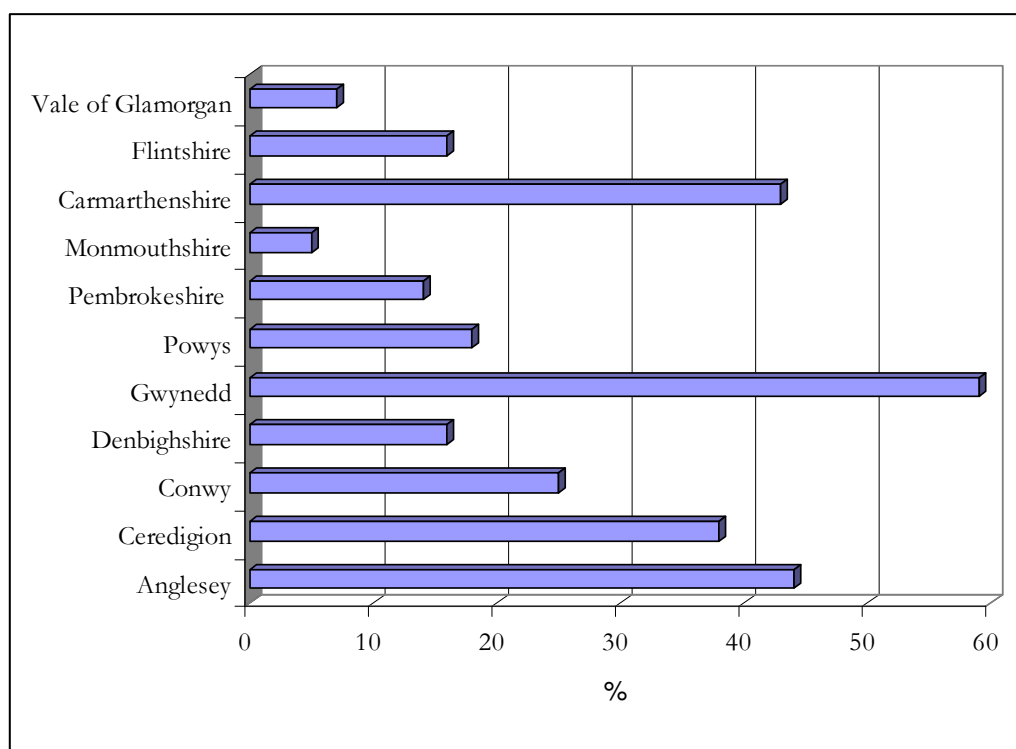
2.27 There is no clear correlation between those who consider their identity to be Welsh and those who speak the language. Fewer than half of those who define themselves as Welsh speak Welsh fluently or quite well, although only 18% of Welsh people speak no Welsh at all.

2.28 Considerably more than a third of household members over the age of 3 covered by this survey can write in Welsh and just over half can read Welsh. One person in every ten people who can speak Welsh fluently or quite well is not able to write in the language.

2.29 Welsh language ability is positively correlated with length of residence and negatively correlated with age. A quarter of people who have lived in their current property for 25 years are 'fluent' Welsh speakers, compared to less than 12% of those who have lived in their current home for less than 5 years. Younger people (under 35) are more likely to be able to speak and, in particular, write and read Welsh; this is likely to be, at least in part, a testament to Welsh being a compulsory subject in schools in Wales since 1990.

2.30 Knowledge and use of Welsh varies significantly across rural Wales (see Figure 2.2). The proportion of fluent Welsh speakers is more than 20 times higher in Gwynedd, where 41% speak fluently, than it is Monmouthshire. Over two-fifths of the populations of Anglesey, Carmarthenshire and Ceredigion speak Welsh fluently, or quite well, compared to less than a fifth of the populations of Denbighshire, Powys, Pembrokeshire and Flintshire.

Figure 2.2 Percentage of respondents able to speak Welsh 'fluently' or 'quite well'

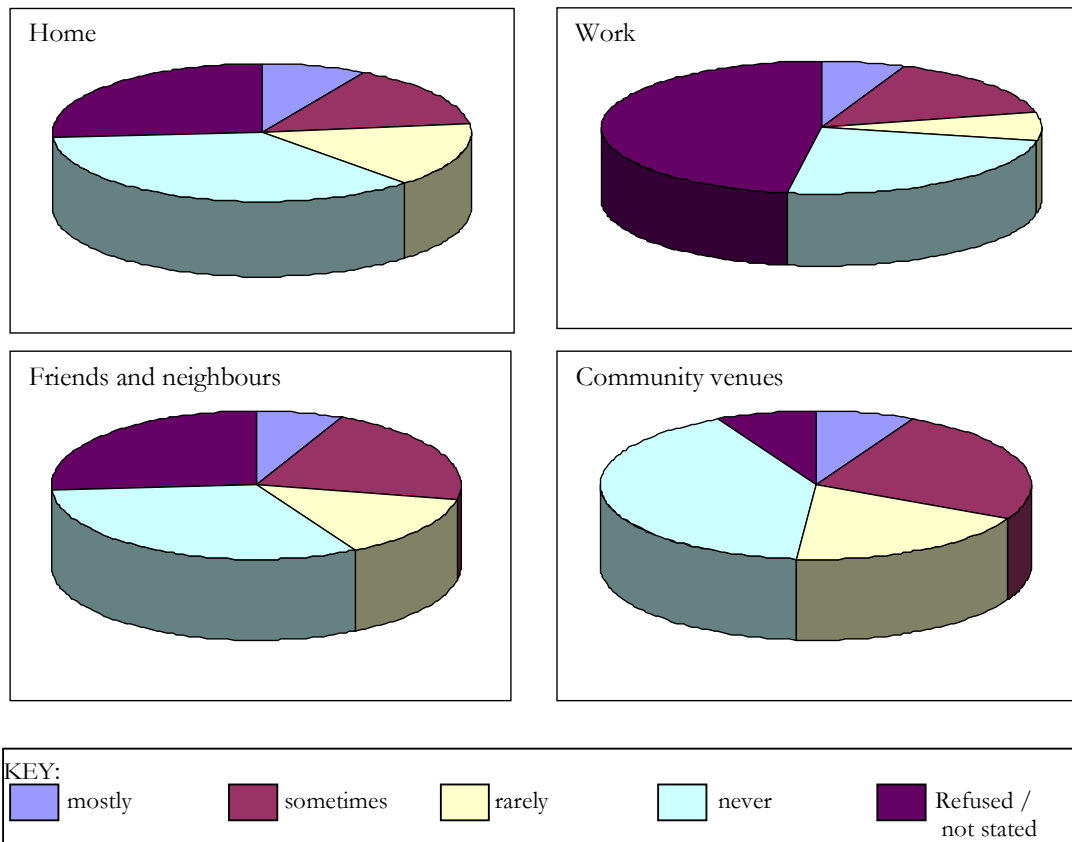


2.31 There is a big difference between Welsh language ability and Welsh language use (see Figure 2.3). Only 8% of those who can speak Welsh do so most of the time at home, with approximately double this number doing so some of the time. Half of Welsh speakers 'rarely' or 'never' use Welsh at home. Welsh speakers are more likely to regularly speak the language in their workplace than in the home (13% speak 'mostly' Welsh and 30% 'sometimes' speak Welsh at work); almost two-thirds of those who speak Welsh however, 'rarely' or 'never' do so at work.

2.32 In social situations - with friends and neighbours and at community venues – twice as many Welsh speakers use the language ‘rarely’ or ‘never’ than the proportion who use it ‘mostly’ or ‘sometimes’. Older people appear more likely to use the language, particularly at home, with friends and neighbours and within their community.

2.33 These figures suggest a relatively low use of Welsh by those who are competent with the language, particularly amongst those aged under 35.

Figure 2.3 Use of Welsh language in four situations by householders who can speak ‘at least a few sentences’ of Welsh



Key findings

- Over half of all households in rural Wales comprise two or fewer people.
 - Sixty percent of households have family members living within ten miles.
- A quarter of respondents have lived in their current home for more than 20 years.
 - The most stable demographic group is the elderly; also less prone to move than others are Welsh speakers and people who consider their ethnicity as Welsh. Respondents from the counties of Anglesey, Carmarthenshire, Ceredigion, Denbighshire, Powys and Pembrokeshire appear to be less prone to move than others.
- Employment is the most common factor influencing decisions to move into rural Wales or to relocate within rural Wales.
 - Six-times more women have moved for their partner to get work, than men have for their partner.
- Half of those living in rural Wales consider themselves as Welsh.
 - Younger respondents are more likely to define themselves as Welsh.
- A fifth of all household members included in the survey speak Welsh fluently.
 - Knowledge and use of Welsh varies significantly across rural Wales. The proportion of fluent Welsh speakers is more than 20 times higher in Gwynedd than it is Monmouthshire.

SECTION 3

HOUSING

Housing is regarded by many as critical to the sustainability of rural areas, due to its influence on the economic, social and environmental fabric of the countryside. In rural Wales, there is particular concern over the apparent shortage of housing stock and over high and rising house prices in many areas, a situation frequently blamed on immigration to rural communities and the purchase of second homes by 'outsiders'. The distortion of housing markets is considered to inhibit young adults from remaining in their local community, helping to create an unbalanced and ageing rural population. More generally it is seen to threaten the cohesiveness of rural society and the survival of local cultures, particularly use of the Welsh language.

This section assesses the current housing situation in rural Wales, giving particular consideration to the influence of age, income, ethnicity and ability to use of the Welsh language, as well as differences between rural areas. It focuses on:

- The nature of housing stock in rural areas
- Tenure of property,
- Problems finding accommodation
- Constraints on moving

Key findings are provided at the end of the chapter.

Housing types and characteristics

3.1 The majority of housing in rural Wales consists of medium-sized and large dwellings. Over three-quarters of the households covered in this survey live in properties with three or more bedrooms. Almost a fifth live in properties with at least four bedrooms. There is least provision for those looking for small properties: less than a quarter of households in this survey live in properties with either two bedrooms or with a single bedroom.

3.2 Detached properties make up close to half of the housing stock of rural Wales, with 47% of respondents living in either a detached house or detached bungalow. Sixteen percent of respondents live in terraced housing. Five percent of respondents live in a flat or maisonette.

3.3 The housing market of rural Wales is dominated by homeowners and potential homeowners. Forty-two percent of respondents own their property outright. Forty percent of householders are in the process of buying their house through a mortgage or other form of loan.

3.4 Shared equity (1%), renting from a local authority (6%) and renting from a housing association (2%) account for a small share of the market. The proportion renting from social landlords is low compared to the UK overall, where 14% of all households rent their property from a local authority and 7% rent from a housing association. Social housing is more likely to be occupied by the lower social classes, contributing to almost a quarter of tenure within social grade DE.

3.5 Its share of the market also varies geographically. It is least common in hamlets and the open countryside, most common in rural towns. Different counties exhibit different social

housing profiles; in Anglesey, for example, respondents are three times more likely to occupy social housing than those in the Vale of Glamorgan.

3.6 Private rented accommodation accounts for the majority of the remainder of the housing market in rural Wales (7% of respondents).

Figure 3.1 Tenure of housing in rural Wales

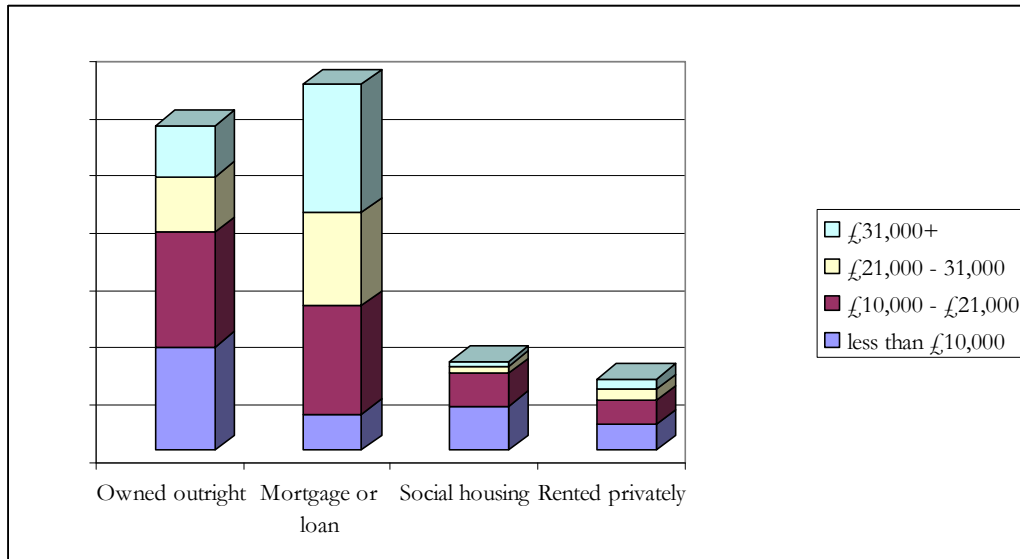


Table 3.1 Household tenure according to age

| | Own property outright (%) | Mortgage or loan (%) | Social housing (%) | Privately rented (%) |
|--------------|---------------------------|----------------------|--------------------|----------------------|
| Under 35 | 12 | 58 | 13 | 15 |
| 35 – 64 | 37 | 46 | 9 | 7 |
| 65+ | 79 | 7 | 9 | 4 |
| <i>Total</i> | 42 | 40 | 9 | 7 |

3.7 Twenty-four percent of respondents who own their home or have a mortgage consider their property to be worth less than £100,000. A third of respondents estimate that the current value of their property is between £100,000 and £199,999. Twenty-eight percent consider it to be worth in excess of £200,000.

3.8 The survey suggests that housing is more expensive in hamlets and the open countryside; respondents in towns are more likely to estimate a relatively low value for their property. Further, there are distinctions between different rural counties: one in ten respondents from Monmouthshire considered their property to be worth less than £100,000, compared with over three-times as many in Carmarthenshire. In Monmouthshire, one in five considered that their dwelling would be valued in excess of £300,000, compared to only 6% in Carmarthenshire.

3.9 These figures do not provide conclusive evidence on the price of housing across rural Wales; a significant proportion (13%) of respondents were unable to estimate the value of their property. The results do indicate, however, that price of housing is higher in countryside which is more accessible to urban areas, perhaps reflecting the demand from

people wishing to live in rural Wales, yet be within close proximity to urban centres for work, leisure and other services.

3.10 Perhaps unsurprisingly, the form of home ownership has strong correlations with age. Those aged 65 or over are over four times more likely to own their home outright compared to those aged between 16 and 24. Renting, whether from a private landlord or a social landlord, is proportionately highest in the 16-24 age group: respondents from this age group are twice as likely to rent their house than either those aged 35-44 or those aged 65 or over.

3.11 Renting is closely related to socio-economic class. Respondents from Social Class E are four-times more likely to rent, compared to respondents in Classes A and B. Correspondingly, income also appears to have a strong influence on whether residents own or rent, with over twice as many respondents in households with a gross annual income of less than £10,000 per annum renting their property compared to respondents in households with a gross annual income of £10,000 or more.

3.12 Fifteen percent of respondents pay less than £200 per month on rent or their mortgage, 21% pay between £200 and £400 and 11% over £400. Over 40% of households have no expenditure on mortgage or rent. Given the greater propensity of those aged 65 and over to own their property outright, this has potentially interesting implications for relative disposable incomes and, correspondingly, patterns of expenditure amongst different age groups.

Housing problems

3.13 Many rural residents think that there is a shortage of affordable housing in their locality. Forty-two percent of respondents consider that ‘most’ people in their local area face problems buying or renting affordable housing, 37% believe that ‘some’ are faced with such difficulties. Only 10% consider that no one in their local area faces such difficulties.

3.14 Perceptions vary according to socio-economic circumstances and demographic characteristics. Almost half of those fluent in Welsh consider that ‘most’ or ‘some’ people in the local area are faced with housing problems, compared to 38% of those who do not speak Welsh. This perception is most marked amongst younger people who are not property owners.

3.15 Problems relating to affordable housing are perceived to be highest in the counties of Gwynedd and Ceredigion, where four out of five respondents consider that ‘most’ or ‘some’ face problems of affordability. They are lowest in Flintshire, where 71% consider that ‘most’ or ‘some’ face problems of affordability. Half of those who live in hamlets or open countryside recognise this as a problem for ‘most’, compared with 39% of those who live in towns or cities.

3.16 Perceptions of a lack of affordable housing in rural Wales do not necessarily tally with the experience of household members surveyed for this report. A fifth of respondents report that that there are members of their household who would like to live somewhere else, a third of whom consider that issues relating to the housing market are preventing them from moving. Almost a fifth of those who wish to move cite shortage of affordable housing as a barrier to moving.

3.17 Income, age and ability to speak Welsh all appear to be negatively correlated with ability to afford housing. Welsh speakers, those under 35, those who have spent most of their life in Wales and those who have a household income of between £21,000 and £31,000, are most likely to report problems.

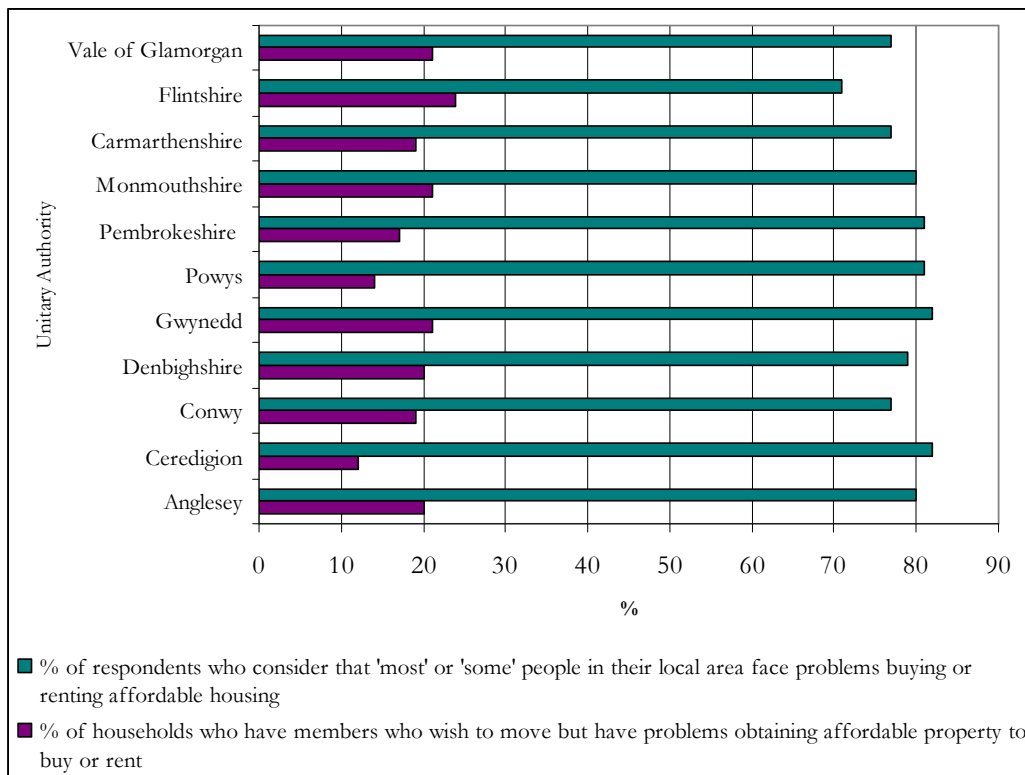
3.18 Shortage of affordable housing appears to be more acute in North Wales. In Flintshire, the survey suggests that 21% of those who wish to move are prevented from doing so as a result of inability to afford property. In Gwynedd 14% of respondents cite this as an issue.

3.19 The lack of affordable housing is not the only barrier to moving. Seven percent of respondents report that a household member has faced difficulty in finding a 'suitable' property in the local area to buy. One percent report difficulties in finding a 'suitable' property to rent from a private landlord. Two percent report difficulties obtaining a 'suitable' property from the local council or housing association. This lack of suitable property, however, appears to be far less significant than lack of affordable housing.

3.20 Twelve percent of households consider that the provision of new housing has led to debate or conflict in the local area. Welsh-speakers and those who define their ethnicity as Welsh are more prone to voice concern about such issues. It is possible that this reflects worries that the increasing number of 'incomers' to rural Wales will erode the language and culture, traditionally considered to be strongest in the 'rural heartlands'. It should be noted however that these concerns may relate to either a lack of appropriate housing or the building of inappropriate housing.

3.21 A minority (4%) of property-owners seeking to move report problems selling their current property. Respondents from Anglesey stand out in this respect with twice as many than the average for rural Wales citing this as a problem.

Figure 3.2 Affordability of housing: actual experience of those wishing to move and perception of problems within the local area



3.22 It is unclear why there is such a marked discrepancy between the proportion of respondents who perceive housing affordability to be a concern and those respondents who report household members actually experiencing this as a problem. It is possible that attention given to this sensitive issue by pressure groups, political organisations and the media have exaggerated the genuine experience of potential homebuyers. Alternatively, it may be that a high proportion of survey respondents – many of whom are existing homeowners - are not aware of the difficulties faced by first-time buyers.

3.33 Interestingly, although housing is considered as a concern in rural Wales, when asked the open questions ‘What do you like / dislike about living around here?’, only a small proportion of respondents make reference to housing. Three percent like living in rural Wales because of cheap and attractive housing, while 2% dislike expensive and / or increasing house prices.

Key findings

- Forty-two percent of respondents own their property outright.
 - Seven percent of respondents rent from private landlords.
- Social housing’ accounts for 9% of the housing market.
 - In Anglesey, respondents are three times more likely to occupy social housing than those in the Vale of Glamorgan
- Forty-two percent of respondents consider that ‘most’ people in their local area face problems buying or renting affordable housing.
 - This perception is most marked amongst younger people who are not property owners.
- Less than a fifth of those who wish to move cite shortage of affordable housing as a barrier to moving.
 - Shortage of affordable housing appears to be more acute in North Wales. In Flintshire, 21% of those who wish to move are prevented from doing so as a result of inability to afford property.
- Twelve percent of households consider that the provision of new housing has led to debate or conflict in the local area.
 - Welsh-speakers and those who define their ethnicity as Welsh are more prone to voice concern about such issues.

SECTION 4

COMMUNITY WELL-BEING AND SOCIAL EXCLUSION

Introduction

There is ongoing concern over the strength of Welsh rural communities. Some fear that agricultural restructuring and demographic change, including the out-migration of many established rural residents and the in-migration of former ‘urbanites’, is undermining traditional ways of life in rural areas. Others are more positive about the likely effects of economic change and population recomposition, suggesting that they are as likely to increase community vibrancy as to diminish it. There is also concern that while for many rural living is a largely positive experience, some rural residents may suffer exclusion from the ‘mainstream’ of rural life.

This section outlines how rural residents perceive their local communities and the extent to which they participate in the social and political institutions that help to underpin community life in rural Wales. In particular, it covers:

- Involvement in collective activities and local organizations
- Wider civic participation
- Local social interaction
- Experiences and perceptions of community life
- Indicators of material disadvantage

Key findings are provided at the end of the chapter.

Involvement in local activities and organizations

4.1 The results of the survey suggest a relatively low level of collective community life. Half of the respondents state that they are not involved with activities organised by local groups and societies. Only 1% belong to a residents’ association and less than 19 out of the 4023 householders surveyed are involved with a neighbourhood watch scheme. 2% are involved with their town or community council.

4.2 Notably, engagement with town / community council activities is higher amongst more established residents, as is involvement with ‘community groups’. There is no overall correlation between levels of participation in collective community life and individual characteristics (for example, age, gender, income, class and ethnicity).

4.3 Compared to the local community more generally, religion is a relatively strong focus for rural residents. Six percent of respondents indicate that they attend church regularly, 2% indicate that they attend chapel regularly. Church and chapel attendance is higher amongst those who have lived in their current property for longer periods.

4.4 The survey results suggest that people living in rural areas of Wales are more likely to be involved with private leisure and recreation activities than with their local community. Eleven percent of respondents are members of a sports club (which might be local to their place of residence or elsewhere), while involvement with hobby groups runs at twice the level of involvement with collective community institutions or groups. There is some correlation between leisure activity and household income, with higher income respondents roughly twice as likely to be members of a private sports club than lower income respondents.

Table 4.1: Involvement in activities organised by local groups and societies (N=4023)

| Group or society | % involved (total) | % involved (length of residence) | | |
|----------------------------------|--------------------|-----------------------------------|------------------------------|------------------------------------|
| | | <i>Resident less than 5 years</i> | <i>Resident 6 – 20 years</i> | <i>Resident more than 20 years</i> |
| Sports club | 11 | 10 | 13 | 9 |
| Local community group | 6 | 4 | 7 | 7 |
| Church | 9 | 4 | 6 | 8 |
| Local voluntary or charity group | 4 | 3 | 4 | 4 |
| Music group | 3 | 2 | 3 | 4 |
| Chapel | 2 | 1 | 1 | 4 |
| Women's Institute | 2 | 2 | 2 | 2 |
| Social club | 2 | 2 | 2 | 3 |
| PTA/Friends of the School | 2 | 2 | 3 | 1 |
| Town or Community Council | 2 | 1 | 3 | 4 |

Wider civic participation

4.5 While engagement with local community activities is low, the survey suggests considerably higher levels of participation in what might be termed wider 'civic' activities. High levels of participation in such activities more generally have been correlated with high levels of social capital. While no such necessary association is made here, the results do suggest the continuation of a relatively strong civic tradition in rural Wales, but at the level of the individual rather than the local community.

4.6 It should be noted that these results may not be fully indicative of the wider population of rural Wales. It is possible that the individuals willing and able to complete the telephone interview utilised in this survey are also more generally more inclined to participate in 'civic' activities, all of which demand commitment in time and effort.

4.7 Many respondents provided evidence of a strong degree of political engagement beyond exercising their right to vote: over the last year, 41% had signed a petition and 28% had attended a public meeting, while 19% had contacted their local councillor and a notably high 15% had contacted their Member of Parliament or Assembly Member. Well over half of all respondents had voted in the last Assembly elections.

4.8 Caring activities also form an important part of many people's lives in rural Wales. Over the last 12 months, 44% of respondents have provided care for neighbours or friends. Given the low level of local voluntary association suggested by responses to the survey, this perhaps suggests that caring in rural Wales largely takes place on a personal and private ('one to one') basis rather than being organised in a more collective context.

4.9 Thirty-five percent of respondents have done voluntary work for charity or other organisations over the last twelve months, contrasting with the relatively low proportion of respondents who are involved with community-focused and community-led organisations. This provides further evidence to support the argument that the local community is not a strong focus for civic participation, and that participation predominantly takes the form of individual private action (whether signing a petition or looking after a neighbour) as opposed to involvement in collective action.

4.10 The figures suggest some degree of correlation between the propensity to participate and Welsh language ability. The proportion of respondents indicating that they had attended a public meeting, done voluntary work, signed a petition, provided care, completed a survey from a council or community group and voted in the 2003 National Assembly election is consistently higher amongst those respondents who speak Welsh fluently – and to a lesser extent amongst those who speak some Welsh – than amongst those who speak no Welsh at all. This correlation should be treated with some caution, as it may well be linked to other social factors.

Table 4.2: Participation in civic activities over the last 12 months (N=4023)

| Activity | % participation (total) | % participation (Welsh language ability) | | |
|--|-------------------------|---|--|------------------------------|
| | | <i>Speak Welsh fluently or quite well</i> | <i>Speak a few words or sentences of Welsh</i> | <i>Speak no Welsh at all</i> |
| Voted in the 2003 Welsh Assembly election | 59 | 70 | 59 | 50 |
| Provided care for friends or neighbours | 44 | 49 | 47 | 36 |
| Signed a petition | 41 | 44 | 45 | 33 |
| Did voluntary work | 35 | 40 | 35 | 30 |
| Attended a public meeting | 28 | 36 | 29 | 20 |
| Completed a survey from a council or community group | 27 | 27 | 30 | 24 |
| Contacted a local councillor | 19 | 21 | 19 | 16 |
| Contacted MP / AM | 15 | 16 | 15 | 14 |
| Took part in a protest or demonstration | 5 | 7 | 6 | 4 |

4.11 Also apparent is some degree of correlation between the propensity to participate and socio-economic status. On every measure of civic participation used in this survey, the participation is in direct proportion to class status – i.e., the higher the class group, the greater the proportion of respondents indicating that they participated. Although there is no wholly consistent pattern amongst respondents in lower to middle income households (under £31,000 per annum), respondents from high income households (more than £31,000 per annum) are considerably more likely to attend a public meeting, do voluntary work, sign a petition, complete a local survey and to have voted in the last Assembly election. Lower to middle income household respondents are, however, more likely to have provided care for neighbours or friends. Again, this correlation should be treated with some caution at this level of analysis.

4.12 While there is strong evidence of a high degree of political participation overall, there is also evidence of considerable scepticism regarding individual political agency. Although 34% feel that they can influence decisions that affect the area in which they

live, 51% feel that they do not have the capacity to influence decisions affecting their local area.

Experiences and perceptions of community life

4.13 Experiences and perceptions of community in rural Wales vary significantly. The majority of rural residents appear to be generally very satisfied with the ‘spirit of community’ in their local area. Overall, three quarters or more respondents give positive answers to the survey questions designed to measure levels of ‘social capital’ in local communities, suggesting that they consider their communities to be safe places to live, that they trust local people, that they are confident that people in their community look out for one another and that they feel a sense of belonging to their community.

4.14 At the same time, negative feelings towards local communities are also apparent, with a relatively small but significant number of respondents giving negative answers to the questions on social capital. While 78% consider that people in their community can be trusted, for example, and 92% feel safe living in their community, 8% do not feel that people in their community can be trusted and 5% do not feel safe living in their community. Fourteen percent do not feel there is a strong sense of community feeling in their local area and 9% do not feel that people in their community look out for one another.

4.15 There is also geographical variation. Respondents from Monmouthshire are more likely than respondents from any other county to perceive their communities in negative terms: only 67% feel that there is a strong sense of community in the place they live, compared to 76% overall; 18% do not feel that they are a member of their local community, compared to 12% overall; 21% do not feel that there is a strong sense of community in their area compared to 14% overall. Respondents from Ceredigion, Powys and Pembrokeshire are more likely than others to perceive their communities in positive terms.

4.16 Perceptions and experiences of community are influenced by a range of factors, of which age and socio-economic status appear to be most important. Younger respondents (under 35 years) more commonly report feelings of isolation, as do respondents from lower income households (less than £10,000 per annum); there is a similar correlation between social class and feelings of isolation, although less strong. Respondents from social class DE are the most likely to report negative perceptions and experiences of community. This should not, however, be taken to imply an automatic and causal relationship between these variables, as the majority of such respondents express positive attitudes. Rather, the evidence points to a significant minority of residents who experience marginalization in both the social and the economic sphere.

4.17 Ability to speak Welsh also appears to be a significant factor. A number of respondents report that the ability to speak Welsh is important for fully participating in their community, but, perhaps unsurprisingly, there is considerable geographical variation in responses. A clear majority from the counties of Anglesey, Ceredigion, Gwynedd and Carmarthenshire consider the Welsh language to be important in respect to community, while in other counties this is a minority view (as low as 9% in Monmouthshire and 12% in the Vale of Glamorgan). Respondents who state that they speak Welsh fluently or quite well are consistently the most likely to report positive experiences and perceptions of community, while those who speak a few words or sentences of Welsh give consistently more positive responses in this respect than those who speak no Welsh at all.

Table 4.3: Welsh language and community (N=3977)

| 'The ability to speak Welsh is important for participating fully in my community' | Agree (%) | Disagree (%) |
|--|------------------|---------------------|
| <i>Total</i> | 39 | 51 |
| Gwynedd | 69 | 22 |
| Ceredigion | 60 | 30 |
| Anglesey | 56 | 34 |
| Carmarthenshire | 52 | 38 |
| Conwy | 35 | 54 |
| Denbighshire | 34 | 56 |
| Flintshire | 25 | 62 |
| Powys | 23 | 65 |
| Pembroke | 22 | 69 |
| Vale of Glamorgan | 12 | 81 |
| Monmouthshire | 9 | 82 |

4.18 Length of residence also appears to have an influence, but there are no strong and wholly consistent patterns. For example, longer-established residents are more likely to consider themselves a member of their local community, to know many people in that community and to have a positive perception of the local community, but they are also more likely to feel that they have declining social contacts within the local area. Those who do not own their property more commonly hold negative perceptions of community than those who do.

4.19 Degree of rurality appears to have a mixed influence. In general, respondents in villages and open countryside are marginally more likely to articulate positive experiences and perceptions of their local communities. For example, 85% of respondents in hamlets or open countryside feel that people in their community can be trusted compared to 74% in towns, while 5% in hamlets or open countryside feel that people in their community do not look out for one another compared to 12% in towns. At the same time, however, feelings of isolation are roughly twice as common amongst respondents living in a hamlet or in open countryside than amongst those living in villages or towns.

4.20 Feelings of marginalization may be linked for some rural residents with relatively limited networks and patterns of social interaction. Fifteen percent of respondents feel that they do not know many people in their local community and 11% feel that they have no close friends or family within five miles of their home; 24% have no member of their family outside the household living within fifty miles of where they live.

4.21 There should be no assumption, however, of a causal link between actual social interaction and perceptions of community; this needs to be ascertained through further analysis of individual responses. Individuals may be part of a static or declining social network – as 26% of respondents feel they are – but still retain a positive perception of community. It is the quality of relationships that counts, not their number.

Local social interaction

4.22 The survey suggests that while the local community is important for many rural residents, for others it is not the central focus for leisure activities and social interaction. Thirty-two percent of respondents do not spend all or most of their time in their community or locality. Fifteen

percent of respondents usually speak to neighbours in places outside the local area. Twenty-five percent usually go to a nearby town or city for entertainment that costs money. On average, younger respondents are less 'community focused' than older respondents. Thus for many living in rural areas, social life appears to be spread over and organised around a wider geographical area than the place they live.

4.23 Going elsewhere to seek entertainment may in some cases reflect a lack of entertainment in the local area, although the lack of clear differences in this respect between those living in towns, villages or open countryside to some extent undermines this hypothesis. Economic status, on the other hand, appears to have a considerable impact on time spent in the local community, with respondents from low income households the most likely to be relatively 'community focused' (i.e. to spend most or all of their time in their locality). Considered together, these two sets of evidence suggest that for some rural residents at least, the relatively large amount of time spent in the local area may be less an active choice than a decision driven by necessity, and, correspondingly, that those who are most able to take themselves elsewhere, do so.

Indicators of material disadvantage

4.24 There is a widespread perception, but nothing like wholesale agreement, that poverty is a prevalent feature of rural Wales. Forty percent of respondents feel that there are people in their community living in poverty, but at the same time 54% feel that no-one in their community could be described as living in poverty. Those who feel that there *is* poverty in their locality are far more likely to be living in a rural town than either a village or the open countryside. They are also more likely to have lived for a shorter period of time in their current place of residence, to be Welsh speakers and to not own their property.

4.25 The survey results suggest that a significant minority of rural residents experience economic deprivation. Nineteen percent of respondents are from households with a gross annual income of less than £10,000 (less than £200 per week). Thirteen percent of respondent households are in receipt of income-related state benefits such as Job Seekers Allowance or Invalidity Benefit. Economic deprivation in rural Wales is to some degree associated with chronic infirmity, although this association should not be interpreted as being necessarily a causal link. Households in the survey with an income of less than £10,000 per annum are well over twice as likely as households with an income of £31,000 or over to include someone with a long-standing illness or disability.

4.26 Lower levels of income generally translate into lower levels of social and leisure activities; respondents from lower income households are far less likely to take holidays or to spend money on entertainment. Eighty-four percent of respondents from households with annual gross incomes of £31,000 or more had had a holiday of at least three nights away from home in the last twelve months, compared to just 49% of respondents from households with annual gross incomes of less than £10,000. Comparably, those who own their house are far more likely to have taken a holiday in the last twelve months than those who do not own their house; the same correlation is found for those in work and out of work.

4.27 Almost half (46%) of respondents from households with annual gross incomes of £10,000 or less spent money on entertainment once a month or less, compared to below a seventh (14%) of respondents from households with incomes of £31,000 or above. Correspondingly, those from the highest income households were almost twice as likely as those from the lowest income households to spend money on entertainment more than once a week. Sixteen percent of respondents from the lowest income households claim that they 'never' do anything for entertainment that costs money; a claim made by 4% or less of other respondents. Put crudely,

rural residents appear to be divided between those with sufficient disposable income to spend on leisure and those without.

4.28 Geographical analysis of these indicators of material disadvantage reveals some spatial concentrations of disadvantage but also in some cases an absence of clear or definite patterns. The proportion of respondents from households with less than £10,000 gross income per annum ranges from a low of 12% in the Vale of Glamorgan to a high of 22% in Anglesey. Anglesey is characterised by deprivation along a number of indices; it has the lowest proportion of respondents from households with incomes of £31,000 and above and the lowest average household income (£20,460), as well as a relatively high proportion (14%) of households receiving state income supplements. Denbighshire also stands out, with respondents roughly a third more likely to be receiving state income supplements than respondents from other counties.

4.29 Indicators of deprivation also help to illustrate more generally the considerable economic differences between rural areas. Average gross annual household incomes vary from just above £20,000 (£20,460) in Anglesey to close to £30,000 (£28,540) in Monmouthshire; in short, an average household income difference of one third, or almost £10,000 per annum. In five counties, average household incomes are under £21,000 while in three counties average household incomes are above £26,000; a difference of one fifth, or at least £5,000 per annum. The data also suggest that average incomes are highest in the open countryside and lowest in rural towns.

4.30 The link between income and leisure behaviour holds up when data is spatially disaggregated. Respondents in Anglesey, the 'least wealthy' county, are the least likely to do anything for entertainment that costs money. In this respect, respondents from Anglesey are closely shadowed by respondents from Carmarthenshire (who are also the least likely to have taken a holiday in the last year), where the average income is close to that of Anglesey. Respondents from Monmouthshire, the most 'wealthy' county, are the most likely to have had a holiday of at least three nights away from home in the last twelve months.

Table 4.4: Indicators of material advantage and disadvantage by county (N=3977)

| | Indicator | | | |
|-------------------|---|---|---|--|
| | <i>Household income below £10,000 per annum (%)</i> | <i>Household income above £31,000 per annum (%)</i> | <i>Household receiving state income support (%)</i> | <i>Spend money on entertainment less than once a month (%)</i> |
| Total | 14 | 18 | 13 | 31 |
| Anglesey | 22 | 13 | 14 | 34 |
| Conwy | 21 | 18 | 14 | 29 |
| Gwynedd | 21 | 14 | 13 | 35 |
| Denbighshire | 20 | 16 | 17 | 33 |
| Pembroke | 20 | 14 | 14 | 32 |
| Carmarthenshire | 20 | 13 | 14 | 35 |
| Ceredigion | 18 | 19 | 11 | 35 |
| Powys | 16 | 15 | 11 | 29 |
| Flintshire | 16 | 24 | 11 | 31 |
| Monmouthshire | 13 | 30 | 9 | 26 |
| Vale of Glamorgan | 12 | 23 | 11 | 25 |

Key findings

- Half of respondents state that they are not involved with any activities organised by local groups and societies.
 - Engagement with town / community councils and with ‘community groups’ is higher amongst more established residents.
- 28% of respondents have attended a public meeting in the last year.
 - Respondents who speak Welsh fluently are more likely to have attended a public meeting, done voluntary work, signed a petition, provided care, completed a survey from a council or community group and voted in the 2003 National Assembly election.
- Thirty-five percent of respondents have done voluntary work for charity or other organisations over the last twelve months.
 - Lower to middle income household respondents are more likely to have provided care for neighbours or friends.
- Fifteen percent of respondents feel that they do not know many people in their local community.
 - Longer-established residents are more likely to consider themselves a member of their local community and to know many people in that community.
- The majority of rural residents appear to be generally very satisfied with the ‘spirit of community’ in their local area.
 - Respondents from Monmouthshire are more likely than respondents from any other county to perceive their communities in negative terms. Respondents from Ceredigion, Powys and Pembrokeshire are more likely than others to perceive their communities in positive terms.
- Forty percent of respondents feel that there are people in their community living in poverty.
 - Those who feel that there is poverty in their locality are far more likely to be living in a rural town than either a village or the open countryside.

SECTION 5

RURAL SERVICES

Introduction

It is frequently commented that local communities in rural Wales are characterised by an ethos of self-sufficiency, self-help and independence. Some stereotypical views of the countryside envisage autonomous, isolated settlements with key services – such as village shop, school, post office and pub – in place. On the other hand, there is evidence that many rural areas have lost, and are still losing, important services. Lack of local provision may be compounded by the remoteness of some communities from service centres and variable access to transport in rural areas. There is also the need to consider the likely differences in the relative situations of the open countryside, villages and rural towns.

This section outlines the experiences and perceptions of rural residents regarding the provision of services in their local area, problems of access to those services and the quality of the services provided. It focuses on:

- Problems accessing key services
- Access to transport
- Perceptions of service quality

Key findings are provided at the end of the chapter.

Problems accessing services

5.1 The survey suggests that many rural residents think that people in rural areas find it difficult to access key services. Twelve percent of respondents think that most people in their locality have problems getting to health services (including a G.P. and general hospital). Twelve percent think that most people in their locality have problems getting to leisure facilities. Seven percent think that most people in their locality have problems getting to shops.

5.2 Reports of actual difficulties reflect this perception, suggesting that many rural residents frequently find it difficult to access local services. Respondents report that either they or another member of their household experience problems getting to a range of facilities. Most commonly reported are problems with access to dentists (18% of respondents), cinemas (18%), hospitals (13%), police stations (12%) and leisure centres (10%). Banks and building societies, cash points (ATMs) and doctors' surgeries also featured prominently in the list. Almost half (49%) of respondents say that there is someone in their household who has problems getting to such services.

5.3 Respondents from low income households are more likely than wealthier residents to experience difficulties getting to a general hospital, supermarket or other food shop. The same correlation is found between access to these services and the social class of respondents. They are also more likely to experience difficulty getting to other services, although the difference here is not so marked. Thus income is the defining household characteristic that significantly influences relative ability to access services in rural areas.

Table 5.1: Difficulty accessing services (N=4023)

| Service | % experiencing difficulty | % experiencing difficulty, by income | |
|--------------------------|---------------------------|--|--|
| | | <i>Household income of less than £10,000 per annum</i> | <i>Household income of more than £31,000 per annum</i> |
| Cinema | 17.8 | 18 | 16 |
| Dentist's surgery | 17.6 | 19 | 17 |
| General hospital | 13.1 | 17 | 9 |
| Police station | 11.5 | 12 | 11 |
| Leisure centre | 10.4 | 12 | 9 |
| Bank or building society | 9.3 | 11 | 8 |
| Social club | 6.5 | 7 | 6 |
| Bus stop | 6.4 | 6 | 7 |
| Doctor's surgery | 6.3 | 9 | 4 |
| Supermarket | 6.2 | 10 | 3 |
| Cash point (ATM) | 6.1 | 8 | 4 |

5.4 Problems of access are far from uniform across different types of countryside. Respondents from villages, hamlets and open countryside were more likely to find it difficult getting to key services than those from rural towns. The biggest differences evident concern access to bus stops, police stations, banking facilities, petrol stations, leisure centres and public libraries.

Table 5.2: Difficulty accessing services, geographical variation (N=4023)

| Service | % experiencing difficulty | % experiencing difficulty, by type of countryside (self-defined area) | | |
|-----------------------------|---------------------------|---|-------------------------------|-----------------------------------|
| | | <i>Town</i> | <i>Large or small village</i> | <i>Hamlet or open countryside</i> |
| Bus stop | 6 | 4 | 5 | 16 |
| Police station | 11 | 7 | 14 | 12 |
| Bank or building society | 9 | 5 | 14 | 11 |
| Cash point (ATM) | 6 | 3 | 8 | 8 |
| Leisure centre | 10 | 7 | 12 | 12 |
| Public house | 3 | 2 | 2 | 5 |
| Social club | 7 | 4 | 7 | 9 |
| Petrol station | 5 | 2 | 6 | 9 |
| Library (inc. mobile) | 4 | 3 | 4 | 6 |
| Garage for car repairs, etc | 5 | 3 | 6 | 6 |

5.5 Significant differences also appear when the data are disaggregated to the county scale. Respondents from Ceredigion are almost four times as likely to have problems getting to a dentist than respondents from the Vale of Glamorgan. There is considerable variation between other counties; problems are reported by 10% of respondents in Flintshire, by 15% of respondents in Carmarthenshire and by 26% of respondents in Gwynedd. In Flintshire, only 7% of respondents reported difficulties getting to a general hospital, while in Gwynedd, 23% reported difficulties; a three-fold difference. Eight percent of respondents from Monmouthshire

reported difficulties, but more than double that percentage (18%) in Anglesey reported difficulties.

5.6 At the same time, no consistent geographical patterns and trends are evident. The likelihood of respondents having difficulty getting to a service differs according to the particular service as well as the geographical area; there are no counties that are either relatively 'good' overall or relatively 'bad' overall.

Access to transport

5.7 Access to private transport in rural areas is variable. Sixteen percent of the households included in the survey include at least one adult without access to a car during the day. Eleven percent of households are without access to a car altogether.

5.8 Such households tend to be low income – 32% of households with a gross annual income of less than £10,000 do not have the use of a car, compared to just over 2% of households with a gross annual income of £21,000 or more. Higher income households are far more likely to have access to more than one car. Thus, low income is related to poor access to private transport in rural areas; access to a private car is not a direct function of income, but the two are strongly correlated.

5.9 Age is also a factor affecting access to private transport. Respondents aged 65 or over are twice as likely as younger people to have no access to a car. Age and low income can thus compound each other in making access to services difficult.

5.10 Difficulty in getting to key services may also be related to, and compounded by, poor access to public transport (itself a key service). Nineteen percent of respondents think that most people in their local area are not adequately served by public transport. Twenty-five percent think that the quality of public transport provision in their locality is poor; only 35% think that it is 'good'. Six percent report that they or other household members found it difficult to get to a bus stop. Whether this relates to actual service provision or personal difficulty is not evident at this level of analysis.

Quality of services

5.11 While many rural residents experience significant problems getting to key services and facilities, the majority have a positive perception of many of those services. Over two-thirds of respondents think that the standard of schools, post offices, banks, food shops and the NHS is generally good in their local area. This, however, leaves a significant minority who do not think those services are of good quality.

5.12 A majority of respondents think that several key services in their local area are not of good quality. At most, half of respondents consider that leisure facilities, policing, community centres and public transport, in their area are of 'good' quality; only 40% think that policing is of 'good' quality. Over a quarter of respondents think that policing and public transport provision in their area is of 'poor quality'. In some cases, it is likely that the relative ability to access a service and the perceived quality of that service are synonymous – for example, in the case of policing and transport.

Table 5.3: Quality of services (N=4023)

| Service | % of respondents rating quality of service | | | | |
|------------------------------|--|-------------|-------------|-------------------|------------------|
| | <i>Good</i> | <i>Fair</i> | <i>Poor</i> | <i>Don't know</i> | <i>No answer</i> |
| Post office | 81.0 | 13.2 | 14.1 | 1.5 | 0.2 |
| NHS | 70.2 | 20.3 | 7.7 | 1.2 | 0.6 |
| Banks and building societies | 69.6 | 17.6 | 8.4 | 3.9 | 0.4 |
| Schools | 68.7 | 12.9 | 2.8 | 10.7 | 4.9 |
| Food shops | 67.8 | 23.8 | 6.9 | 1.2 | 0.2 |
| Leisure facilities | 49.6 | 24.1 | 15.0 | 8.9 | 2.4 |
| Community centre | 47.1 | 20.4 | 7.5 | 18.8 | 6.2 |
| Policing | 39.9 | 34.6 | 18.4 | 4.4 | 2.6 |
| Public transport | 35.1 | 28.0 | 25.2 | 8.5 | 3.1 |

5.13 Perceptions of the quality of public transport may well not be related to actual use of public transport. Those in low income households – who, given that they are less likely to have access to a car, are more likely to rely on public transport – are far more likely than those in high income households to have a positive perception of public transport provision; 45% of respondents from households with an income of less than £10,000 per annum think that the quality of public transport in their local area is good compared with only 25% of respondents from households with an income of £31,000 per annum or greater. Older residents were also more likely to have a better perception of public transport quality.

5.14 Significant differences are evident when the data are disaggregated to the county scale. There is most differentiation in perceptions of the quality of public transport. Respondents from Powys are almost four times as likely than respondents from Conwy to think that public transport in their area is of poor quality, and there are significant variations between these extremes. There is least differentiation in perceptions of the quality of post offices; although there is considerable variation between counties regarding those who think that post offices in their local area of poor quality, the proportion of those who think they are of good quality – the majority – varies by less than 10% between counties.

5.15 At the same time, as with access to services, no consistent geographical patterns and trends are evident. The likelihood of respondents having a positive perception of a service differs according to the particular service as well as the geographical area. Although Conwy and Glamorgan are relatively 'good' across more services than most and Powys and Monmouthshire are relatively 'bad' across more services than most, there are no counties that are either relatively 'good' overall or relatively 'bad' overall. Perceptions of the quality of service appear to be uniform across different types of countryside.

Key findings

- Forty-nine percent of respondents say that there is someone in their household who has problems getting to key services.
 - Income is the defining household characteristic that significantly influences relative ability to access services in rural areas.
- Eleven percent of households are without access to a car.
 - Thirty-two percent of households with a gross annual income of less than £10,000 do not have the use of a car, compared to less than 3% of households with a gross annual income of £21,000 or more.
- At most, half of respondents consider that leisure facilities, policing, community centres and public transport, in their area are of 'good' quality.
 - Respondents from Powys are almost four times as likely than respondents from Conwy to think that public transport in their area is of 'poor' quality.
- Over two-thirds of respondents think that the standard of schools, post offices, banks, food shops and the NHS is generally 'good' in their local area.
 - Conwy and Glamorgan are relatively 'good' across more services than most and Powys and Monmouthshire are relatively 'bad' across more services than most.

SECTION 6

EMPLOYMENT AND THE ECONOMY

Introduction

The economy of rural Wales is in a period of ongoing transition. The traditional employment base of many rural areas is changing. Although agriculture remains integral to much of the rural landscape and is seen by many as the 'backbone' of rural communities, its contribution to GDP and employment is relatively low. There has also been a **decline in the employment share of other primary industries and manufacturing**. Tourism has become an important sector in some places, but concern has been expressed over its tendency to provide predominantly seasonal and relatively low-paid work. Increasingly it is argued that the rural economy must diversify if it is to be sustainable.

This section examines the nature of employment and characteristics of the workforce in rural Wales. It focuses on:

- The skills base of rural areas
- Employment and unemployment
- Difficulties finding employment
- Type of employment
- Sectors of employment
- Travel to work

Key findings are provided at the end of the chapter.

The skills base of rural areas

6.1 The survey suggests that many rural areas in Wales have a relatively limited academic skills base, at least in terms of accredited qualifications. Almost half (49%) of respondents either have not proceeded past compulsory (post-16) schooling or have left post-compulsory schooling with no further educational qualification. Seventeen percent of respondents state that they have no academic qualifications. Almost a third (32%) state that they have no post-16 academic qualifications; their highest academic qualifications are either at GCSE level or equivalent or a School Leaving Certificate.

6.2 At the same time, the survey suggests that the same proportion (almost half) of rural residents have proceeded into post-compulsory education and left with additional education qualifications. Forty-nine percent of respondents are educated to at least A-Level standard. For 12% of respondents, their highest educational qualifications are A-Levels or their vocational equivalent (such as an HNC or OND). Seventeen percent have a university degree. Six percent have a postgraduate qualification.

6.3 To a limited extent, educational attainment can be correlated with residential mobility. The survey suggests that residents who have lived for a shorter time in their current property are more likely to have both a university degree and postgraduate qualifications. Respondents who have lived in their current place of residence for 20 years or more are almost twice as likely to have no educational qualifications than respondents who moved to their current place of residence in the last 5 years.

6.4 The negative correlation between academic qualifications and age is also notable. Thirty-two percent of respondents aged 65 and over state that they have no academic qualifications, compared to 15% of those aged between 35 and 65 and just 5% of those aged between 16 and

34. Older residents are also significantly less likely to have a university degree or postgraduate qualification.

Table 6.1: Educational qualifications (N=4023)

| Highest educational qualification | % total | % respondents by age | | |
|-----------------------------------|---------|----------------------|--------------|-------------------|
| | | % aged under 35 | % aged 35-64 | % aged 65 or over |
| No academic qualifications | 17 | 5 | 15 | 32 |
| School leaving certificate | 7 | 12 | 5 | 17 |
| O Level, CSE or GCSE | 25 | 27 | 28 | 14 |
| A Level, HNC or OND | 14 | 23 | 14 | 7 |
| HND or similar | 12 | 13 | 13 | 8 |
| University degree | 17 | 22 | 17 | 13 |
| Postgraduate qualification | 6 | 7 | 7 | 3 |

6.5 Based on responses to the survey, some counties appear to be relatively ‘qualification rich’ while others appear to be relatively ‘qualification poor’. For example, respondents from Carmarthenshire, Anglesey, Conwy and Denbighshire are almost twice as likely than respondents from Monmouthshire and the Vale of Glamorgan to have no educational qualifications. Accentuating this imbalance, respondents from Anglesey, Denbighshire and Carmarthenshire are considerably less likely than respondents from other rural counties to have a university degree. Eight percent of respondents from Ceredigion have a postgraduate qualification compared to 3% in Pembrokeshire; almost a three-fold difference.

Table 6.2: Educational qualifications by county (N=3977)

| County | % respondents with highest qualification | | |
|-------------------|--|-------------------|-----------------------------|
| | No qualifications | University degree | Postgraduate qualifications |
| Total | 17 | 17 | 6 |
| Anglesey | 19 | 12 | 5 |
| Ceredigion | 16 | 20 | 8 |
| Conwy | 19 | 17 | 4 |
| Denbighshire | 19 | 12 | 5 |
| Gwynedd | 17 | 19 | 5 |
| Powys | 18 | 19 | 6 |
| Pembrokeshire | 16 | 18 | 3 |
| Monmouthshire | 11 | 19 | 11 |
| Carmarthenshire | 21 | 13 | 6 |
| Flintshire | 15 | 17 | 6 |
| Vale of Glamorgan | 11 | 20 | 7 |

Employment and unemployment

6.6 The survey suggests that unemployment is relatively low in rural Wales. Only 3.2% of respondents, excluding retirees (N = 2886), define themselves as unemployed and available for work, compared to a Wales average of 4.6% in the three months leading up to May 2004 (July 2004 ONS Labour Market Statistics). Slightly over 14% of respondents excluding retirees are not in paid employment and are not looking for paid work; 7.9% (N = 2886) do not work as a result of long-term sickness or disablement; 6.4% (N = 2886) classify their employment status as

'looking after the home full-time'. 28% of all respondents (N=4023) are wholly retired from work.

6.7 The female unemployment rate in rural Wales is higher than the male unemployment rate by a factor of 1.29 (i.e. it is 129% of the male unemployment rate). Respondents aged between 16 and 34 are twice as likely than respondents aged between 35 and 64 to be unemployed. Home-owners are less likely to be unemployed than those who rent. Relatively established residents are less likely to be unemployed than newer arrivals.

Table 6.3: Employment status, excluding those wholly retired from work (N=2886)

| Employment status | % of respondents |
|---|-------------------------|
| Employee in full-time job | 50.8 |
| Employee in part-time job | 15.2 |
| Self-employed | 14.1 |
| | |
| In full-time education | 2.3 |
| On a government-supported training scheme | 0.2 |
| | |
| Unemployed and available for work | 3.2 |
| Long-term sick and disabled | 6.3 |
| On maternity leave | 0.1 |
| | |
| Looking after the home full-time | 6.4 |
| | |
| Doing something else | 1.1 |
| Don't know | 0.2 |

6.8 Unemployment rates vary considerably according to geography. Respondents in hamlets and open countryside are less likely than respondents from other rural areas to be unemployed. The self-defined unemployment rate across the rural counties varies from 1% in Monmouthshire to 5% in the Vale of Glamorgan.

6.9 While unemployment is low in rural Wales, the employment rate is relatively high. Eighty percent of respondents, excluding retirees (N = 2886) define themselves as in paid work, compared to a Wales average of 72.7% in the three months leading up to May 2004 (July 2004 ONS Labour Market Statistics). Ninety-five percent of respondents (including those who are currently retired) have had a paid job at some point in their lives. Sixty-seven percent of households surveyed receive income from paid work and so have at least one household member currently in employment.

Difficulties finding work

6.10 The survey also suggests, however, that many rural residents experience difficulties finding work. As with several other issues covered by the survey, there is a discrepancy between the proportion of respondents identifying a general problem affecting others and the proportion of respondents identifying a problem that directly affects them. Twenty-five percent of respondents aged between 16 and 64 (N = 3185) report that they have found it difficult to find a suitable job in their local area, but 30% think that 'most people' in their local area find it difficult to find employment. Of all household members aged between 16 and 64 included in the survey (N =

5862), 23 % of those who have looked for paid work have experienced difficulties finding the job they wanted.

6.11 A variety of difficulties were reported. The difficulties most frequently reported relate to the employment market: 38% of respondents who reported having had difficulties finding work (N = 791) said that they had found insufficient employment opportunities in their local area; 38% said that there were too few 'suitable jobs' in their local area. Five percent reported insufficient full-time work; 4% reported insufficient part-time and/or flexible work.

6.12 Difficulties related to personal circumstances were also frequently reported. Eight percent had found it hard to get to places where jobs were available. Six percent reported that they had come up against 'language barriers' in looking for work, although they did not specify the nature of these barriers. Three percent think that their age counted against them finding work (all but one of the respondents who think this are over 35).

Table 6.4: Difficulty finding work (N=791)

| Reported difficulty | % of respondents aged 16-64 reporting difficulty |
|--|---|
| Not enough jobs in general | 38 |
| Not enough suitable jobs | 38 |
| Not enough full-time work | 5 |
| Not enough part-time /flexible work | 4 |
| Too few opportunities for graduates | 4 |
| Too few opportunities for school leavers | 2 |
| Shortage of childcare facilities | 2 |
| | |
| Hard to get to places where jobs are available | 8 |
| Language barriers | 6 |
| Salary | 6 |
| Ageism / age is a problem | 3 |

6.13 Patterns of reported difficulty in finding work reflect many of the patterns of self-defined unemployment outlined above. Newer arrivals are more likely than relatively established residents to report having difficulties finding work. Younger respondents (aged 16-34) are almost twice as likely than older respondents (aged 35-64) to report difficulties. There is a negative correlation between level of income and reported difficulty finding work, although it is not as strong as other correlations.

6.14 Respondents from rural towns are more likely than those from hamlets or open countryside to have had difficulties finding work. Reported difficulties vary considerably across the rural counties, ranging from 17% of respondents in the Vale of Glamorgan and Flintshire to 32% of respondents in Anglesey.

Type of employment

6.15 Employment in rural Wales is characterised by a considerable proportion of people in part-time work, in self-employment and holding multiple jobs. Of those respondents defining themselves as currently in paid employment (N = 2312), 63% have a full-time job, 19% have part-time job and 18% are self-employed. Eleven percent of all households surveyed included

someone holding more than one job. Self-employment is particularly high, compared to the UK average of 14% (2004, Labour Market Survey).

6.16 The survey suggests that whether a respondent is employed part-time or full-time bears little or no relation to household income. Women are over four times more likely than men to work part-time. Men are over twice as likely as women to be self-employed. Respondents who have spent most of their life outside Wales are less likely to hold a full-time job than respondents who have spent most of their life within Wales, although there is little difference in this respect regarding those in part-time work and the self-employed.

6.17 There is a higher proportion of part-time workers in hamlets and the open countryside than there is in villages and towns. Respondents from hamlets or the open countryside are the least likely to hold a full-time job and the most likely, by a significant margin, to be self-employed. There are considerable variations in employment status across the rural counties. The proportion of respondents in full-time work varies from 33% in Ceredigion to 50% in Monmouthshire. The proportion of respondents in part-time work varies from 7% in Flintshire to 15% in Anglesey; a 114% difference. Respondents in Ceredigion, Powys and Pembrokeshire are more than twice as likely to be self-employed than respondents in Conwy and Carmarthenshire.

6.18 The survey suggests that the public sector and small private enterprises together provide over half of all employment in rural areas. Of all the household members included in the survey who are currently in work (N=4601), 35% work in private enterprises that employ fewer than 25 people. Twenty-seven percent describe themselves as working in the public sector. A substantial proportion (21%), however, work in private enterprises that employ more than 100 people. Two percent are employed in the voluntary sector.

6.19 While small private enterprises are important employers, they frequently provide relatively low paid work. Of those respondents currently employed and from households with gross annual incomes of less than £10,000, almost half (49%) work for a small private enterprise (defined as a private business employing fewer than 25 people). The public sector, while providing fewer jobs, on average provides higher incomes. Of those respondents currently employed and from households with gross annual incomes of £31,000 or more, 37% work for the public sector.

6.20 At present, the figures showing geographical variations in terms of the size and nature of employers are based on all respondents currently in work (N=2318). They indicate that small private enterprises provide considerably more employment to those living in hamlets and the open countryside than they do to those living in villages and rural towns. In contrast, large enterprises (defined as a private business employing more than 100 people) are far more important in villages and towns than they are in more open countryside.

6.21 There is also considerable variation in terms of the size and nature of employers across different counties. The contribution of small private enterprises to the rural employment base ranges from 24% (in Conwy) to 43% (in Ceredigion); close to a two-fold difference. The contribution of large enterprises ranges from 12% (in Pembrokeshire) to 35% (in Monmouthshire); almost a three-fold difference. The contribution made by the public sector appears to be more geographically uniform, although it still ranges from 22% (in Anglesey) to 37% (in Carmarthenshire).

Sectors of employment

6.22 The survey suggests that rural Wales has a diverse employment base but that a small number of key sectors provide the majority of employment. The most important employment sectors are public administration, education and health and social work; 44% of household members aged

between 16 and 64 who are currently working or have previously been working (N=6323) are employed, or were last employed, in one of these sectors.

6.23 Sixteen percent state their current employment or last employment as being in the wholesale and retail trade or repair of motor vehicles. Twelve percent are employed or were employed in manufacturing. Construction and hotels and catering are a significant component of the employment base (both 7%). Six percent of respondents aged between 16 and 64 who are currently working or have previously been working state their occupation or last occupation as agriculture or agriculture-related.

Table 6.5: Key sectors of employment (N=6323)

| Employment sector | % household members aged 16-64 who are currently in paid work or who have worked previously |
|--|--|
| Health and social work | 17 |
| Wholesale and retail trade; repair of motor vehicles | 16 |
| Public administration and defence | 14 |
| Education | 13 |
| Manufacturing | 12 |
| Construction | 7 |
| Hotels and catering | 7 |
| Agriculture, hunting and forestry | 6 |

6.24 At present, the figures showing geographical variations in different employment sectors are based on all respondents who are currently working or previously have worked, including those aged 65 (N = 3945). The survey suggests that the agriculture, hunting and forestry sector is a far more significant part of the rural employment base in hamlets and the open countryside than in either villages or towns, accounting for 11% of the workforce in such areas. In contrast, manufacturing, wholesale, retail and motor repair are far more significant to those living in towns, where between them they account for 24% of the workforce. Other key sectors are of similar importance across towns, villages and open countryside.

6.25 Based on all respondents who are currently working or previously have worked (N=3945), the significance of different employment sectors varies significantly across the different rural counties. Agriculture and agriculture-related occupations account for as little as 2% (in Conwy and the Vale of Glamorgan) and as much as 7% (in Ceredigion) of the rural employment base. Hotels and catering, signifying tourism-related employment, account for as little as 2% (in Carmarthenshire) and as much as 9% (in Anglesey) of the rural employment base; a more than four-fold difference. Manufacturing accounts for as little as 4% (in the Vale of Glamorgan) and as much as 20% (in Flintshire); a five-fold difference.

Table 6.6: Key sectors of employment by county (N=3945)

| County | % of respondents in employment sector | | | |
|-------------------|---------------------------------------|---------------------|---------------|-----------------------------------|
| | Agriculture, hunting and forestry | Hotels and catering | Manufacturing | Public administration and defence |
| Anglesey | 5 | 9 | 10 | 8 |
| Ceredigion | 7 | 6 | 8 | 12 |
| Conwy | 2 | 7 | 7 | 13 |
| Denbighshire | 4 | 4 | 12 | 11 |
| Gwynedd | 4 | 6 | 10 | 13 |
| Powys | 6 | 4 | 14 | 13 |
| Pembrokeshire | 6 | 5 | 10 | 15 |
| Monmouthshire | 4 | 4 | 13 | 13 |
| Carmarthenshire | 4 | 2 | 10 | 14 |
| Flintshire | 4 | 4 | 20 | 12 |
| Vale of Glamorgan | 2 | 3 | 4 | 16 |

Travel to work

6.26 The survey suggests that the majority of rural residents work within or close to their place of residence². Of all respondents in work or previously in work and with a fixed place of work, half work less than five miles from home and well over two thirds (71%) work less than ten miles from home. Of the same set of respondents, 11% either work at home or have a job based at their home. Over one third of respondents who do not work at or from home work less than five miles from their home.

6.27 At the same time, the survey suggests that a substantial minority of rural residents are regular long-distance commuters. Of all respondents who are in paid work or have previously been in paid work and with a fixed place of work, almost one third (31%) work more than ten miles from their home. Fifteen percent work more than 20 miles from their home. Eleven percent of respondents stated that they had no fixed place of work.

6.28 Women are more likely to work closer to home than men, although the difference between them in this respect is not great. Those from households on lower incomes are far more likely to work a relatively short distance from home compared to those from households with higher incomes. A similar positive correlation is found between distance of the workplace from home and the social class of the respondent. Respondents in social classes C2 and DE are more likely than those in social classes AB and C1 to have no fixed place of work.

6.29 These aggregate figures disguise some geographical variation. Respondents living in more open countryside are over twice as likely to work at or from home than those living in villages or towns. On the other hand, those respondents in more open countryside who work away from home are considerably less likely than others to work within five miles of home. This suggests limited local employment opportunities within such areas.

6.30 There is considerable variation between unitary authority areas regarding the likelihood of rural residents working at or from home. The proportion of relevant respondents working at or from home varies from 6% (in Flintshire) to 18% (in Ceredigion); a three-fold difference. In all unitary authority areas at least 60% of respondents work less than ten miles from home.

² It should be noted that travel to work figures refer to distance, not time.

Table 6.7: Distance to work, all respondents in work or previously in work and with a fixed place of work (N=3272)

| County | % working at/from home | % working fewer than 5 miles from home | % working fewer than 10 miles from home | % working more than 10 miles from home |
|-------------------|------------------------|--|---|--|
| Total | 11 | 39 | 71 | 31 |
| Anglesey | 11 | 46 | 78 | 22 |
| Ceredigion | 18 | 34 | 74 | 25 |
| Conwy | 9 | 45 | 73 | 27 |
| Denbighshire | 8 | 39 | 70 | 30 |
| Gwynedd | 10 | 41 | 73 | 27 |
| Powys | 12 | 40 | 69 | 31 |
| Pembrokeshire | 14 | 38 | 75 | 25 |
| Monmouthshire | 12 | 31 | 60 | 40 |
| Carmarthenshire | 11 | 41 | 69 | 31 |
| Flintshire | 6 | 31 | 60 | 39 |
| Vale of Glamorgan | 9 | 34 | 69 | 31 |

6.31 In getting to their place of work, the majority of rural residents rely on private transport. Sixty-eight percent of respondents who currently work or have previously worked away from home, and who provided an answer to the survey question on travel to work, use a household car, motorbike or other motor vehicle to get to their work place. Seven percent share someone else's car for the journey to work. A further 2% use a bicycle. A substantial proportion (13%) walk to work.

6.32 The survey suggests that very few people in rural areas rely on public transport in getting to work. Only 4% of respondents travelling to work use a bus to get to work and only 1% use the train. Those who do not use a motor vehicle belonging to the household or share someone else's car for the journey to work are more than twice as likely to walk to work than to use public transport.

6.33 Modes of transport vary according to income. Respondents from households with an annual gross income of £31,000 or more are over twice as likely to use a household car, motorbike or other motorised vehicle to get to work than those respondents from households with an annual gross income of less than £10,000. Respondents from households with an annual gross income of less than £10,000 are twice as likely to walk to work than respondents from households with an annual gross income of between £21,000 and £31,000, and over four times as likely to walk to work than respondents from households with an annual gross income of more than £31,000.

6.34 According to the survey, the train is the least-used mode of transport for travel to work in rural areas. Of those respondents most reliant on public transport in going to work – those from low income households – 9% use the bus while only 2% (9 out of the total sample of 3225) reported use the train.

6.35 The proportions of rural residents using different forms of transport to get to work varies according to the type of countryside they live in. Those respondents who describe themselves as living in a hamlet or in open countryside are more likely to use a car – either a household car or sharing someone else's car – than those who describe themselves as living in a village or town. Correspondingly, reported use of public transport to get to work is lower in hamlets and open countryside than in rural towns. Walking to work is considerably more popular in rural towns,

where 21% of respondents report that they walk to work, than in villages or the more open countryside, where 8% of respondents report that they walk to work.

6.36 Relative use of private transport to get to work varies significantly between different counties. The highest use is in Gwynedd, where 92% of all respondents who answered the travel to work question report that they use a household motor vehicle to get to work. The lowest use is in Anglesey, where 63% of all respondents who answered the travel to work question report that they use a household motor vehicle to get to work.

6.37 Correspondingly, the proportion of those walking to work also varies significantly between different counties. Respondents in Powys and Anglesey, where respectively 17% and 18% of respondents answering the travel to work question walk to work, are over twice as likely to walk to work than respondents in Monmouthshire, Flintshire and the Vale of Glamorgan, where respectively 8% and 7% of those respondents walk to work. Relative use of other modes of transport is roughly the same across the twelve counties.

Key findings

- Seventeen percent of respondents state that they have no academic qualifications.
 - Respondents from Carmarthenshire, Anglesey, Conwy and Denbighshire are almost twice as likely than respondents from Monmouthshire and the Vale of Glamorgan to have no educational qualifications.
- Just over 3% of respondents excluding retirees define themselves as unemployed and available for work.
 - Respondents in hamlets and open countryside are less likely than respondents from other rural areas to be unemployed.
- Twenty-five percent of economically-active respondents report that they have found it difficult to find a suitable job in their local area.
 - Younger respondents (aged 16-34) are almost twice as likely than older respondents (aged 35-64) to report difficulties.
- Of those respondents currently in paid employment, 63% have a full-time job, 19% have part-time job and 18% are self-employed.
 - Women are over four times more likely than men to work part-time.
- Forty-four percent of those in work are employed in public administration, education or health and social work.
 - Public administration, education and health and social work accounts for a similar proportion of employment across rural Wales.
- Taking into account all respondents either currently in paid employment or previously in paid employment, agriculture, hunting and forestry account for 6% of jobs across rural Wales.
 - The contribution of agriculture, hunting and forestry to the employment base in rural areas ranges from 2% in Conwy and the Vale of Glamorgan to 7% in Ceredigion.
- The majority of rural residents in paid employment work within or close to their place of residence, although 31% of respondents work more than ten miles from their home.
 - Those from households on lower incomes are far more likely to work a relatively short distance from home compared to those from households with higher incomes.

SECTION 7

ATTITUDES TO RURAL WALES

It is challenging to summarise how those living in rural Wales view their locality and rural Wales more generally. Defining rural Wales is problematic; while to some, its characteristics might seem self-evident, it is actually highly differentiated – there is no single ‘Welsh countryside’ but rather a number of very different ‘Welsh countrysides’. The population of rural Wales is diverse, composed of individuals, groups and communities with different perceptions, interests and priorities. Definitions vary according to not just where people live but also according to who is defining and for what reasons the definition is being provided.

This section explores attitudes to living in rural Wales, with a particular focus on how the demographic and socio-economic characteristics of respondents, along with geography and rurality, influence perceptions and opinions. It focuses on:

- Perceptions of conflict in rural Wales
- Attitudes towards development
- Membership of countryside organisations
- What people like and dislike about living in rural Wales

Key findings are provided at the end of the chapter.

Perceptions of conflicts

7.1 The survey implies that for many rural Wales is a contested space. Sixty percent of respondents make reference to issues that have caused conflict within their locality. Those who identify such issues make reference to a diverse range of concerns; no single matter predominates. Most draw attention to problems relating to planning and new development; far fewer mention problems directly concerned with employment and community well-being.

7.2 New housing development is the issue considered to cause most widespread concern across rural Wales (cited by 12% of respondents). Welsh-speakers and those in the highest income band are most likely to perceive this as a problem.

7.3 The wide range of responses is perhaps an indication of the different pressures, particularly in planning and development, across rural Wales. In Powys, for example, the creation of wind farms is of three times greater concern than it is across rural Wales as a whole. Traffic problems, speeding and speed cameras are mentioned by 25% more people in Monmouthshire than Carmarthenshire. The development of new tourism is seen as particularly problematic in Pembrokeshire. Other issues, such as farming and the protection of the rural landscape, are more pertinent to those who live in open countryside, than to those who live in towns.

7.4 There is some indication that concerns which are traditionally conceived as ‘urban problems’ are perceived as absent in rural areas. Crime, vandalism, drugs and anti-social behaviour are cited by only 3% of respondents as creating debate or conflict across rural Wales. It thus appears that rural Wales is seen as a relatively safe and secure place to live. These issues, however, appear to be of greater importance in some places than in others. Respondents living in towns are five times more likely to be concerned with such issues than those in the open countryside. ‘Law and order’ issues are of much greater concern to residents in North Wales, particularly the counties of Conwy and Denbighshire, than in other unitary authorities.

7.5 Four out of ten households do not identify any issues that cause debate or conflict in their local area. This perception of relative harmony is particularly common amongst older residents and those who have lived most of their lives in Wales.

Development and conservation

7.6 The survey suggests that many rural residents are concerned about the development of rural areas. The scale and type of development respondents had in mind when responding to this question is unclear. Overall, however, there is a positive attitude to new development in existing settlements across rural Wales.

7.7 Most respondents consider that new development in rural areas should be concentrated in existing towns (63%), on the edge of towns (59%) and in villages (44%). A minority (13%) think that new development should take place in the open countryside.

7.8 A few respondents (6%) think that rural Wales should be preserved in its current form, with no more development in rural areas. Older people are more likely to hold 'preservationist' attitudes, perhaps reflecting a dislike and / or fear of 'change' more generally.

7.9 Households in favour of development appear to be correlated with higher income and social class. Respondents from households with higher income and from a higher social class are more likely to favour development in rural areas; in particular, they consider it would be appropriate in 'existing towns'. Interestingly, those living in more rural areas (villages, hamlets and open countryside) are more likely to support new development in such areas, perhaps associating development with positive outcomes, such as more vibrant communities, greater opportunities for employment and improved services, rather than with loss of character and identity.

7.10 While many rural residents hold positive attitudes towards development in rural Wales, a significant minority are also actively concerned with conservation. Almost a quarter of respondents are members of an organisation concerned with outdoor, rural or environmental issues. The figures indicate that membership is most likely to be with UK organisations, such as the National Trust and the Royal Society for the Protection of Birds, rather than Wales-wide organisations (such as Cadw and CPRW) or local bodies. Membership tends to be higher amongst those aged over 35, living in more rural areas and with relatively high levels of household income.

What do people like about living in rural Wales?

7.11 People's likes and dislikes of living in rural Wales are wide-ranging, reflecting the diversity of rural Wales and its residents.

7.12 In answering the open-response question addressing what people like about living in rural Wales, half of respondents refer to their environment and over a quarter refer to positive social and cultural characteristics. Close to a fifth make reference to economic benefits, high levels of service provision and the convenience of their location.

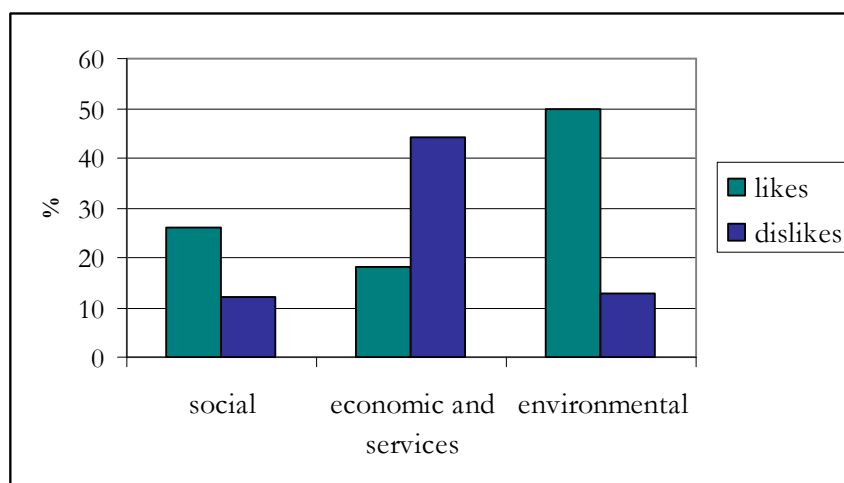
7.13 Over a third of respondents comment on the benefits of the peaceful and quiet nature of the area in which they live and, more generally, the benefits of living in or close to the countryside. Those living in open countryside are more likely to place emphasis on the high quality and peaceful nature of their surroundings. This issue was of most significance for respondents from households in the highest income bracket and from the upper – middle class. It would be interesting to ascertain whether this is a result of this group more commonly living in 'prime

locations' or whether it reflects the higher emphasis they place on the natural environment and aesthetic values.

7.14 A fifth of respondents like living in rural Wales because of the 'friendliness of people / nice neighbours'. This issue appears to be particularly significant for those over 65, over a quarter of whom like living in rural Wales because of the people. Younger people are less inclined to make reference to the friendliness of people and good community spirit in their area.

7.15 The relative importance of particular 'likes' varies across rural Wales. The provision of services, for example, appears to be of greater importance for residents of Monmouthshire than those in Pembrokeshire, while the importance of social factors ranges from 30% of respondents in Carmarthenshire to 22% in Conwy. Over half (54%) of respondents in Pembrokeshire mention the environment as a positive factor, compared to 45% in Monmouthshire.

Figure 7.1 What do respondents like and dislike about living in rural Wales?



What do people dislike about living in rural Wales?

7.16 Overall it appears that rural residents are more satisfied than dissatisfied with living in rural Wales. Respondents provided 50% fewer responses to the open-question 'What do you dislike about living around here?' than to the question 'What do you like about living here?'. Over a third of respondents did not identify any negative perceptions of living in rural Wales.

7.17 People's dislikes regarding living in rural Wales are as diverse as their likes. To an extent, the results are along the same lines as people's likes: 19% of responses to this question relate to the poor quality of the environment, 44% to poor quality of services, the unfavourable economy and the high cost of living, and 11% to social and cultural issues.

7.18 The main challenges identified relate to economic issues (44% of responses) – particularly problems with employment, wages, services, public transport and roads. Concerns relate to quality, availability and access.

7.19 For many respondents, dislikes appear to be linked to living in areas with poor service provision and remoteness from service centres. Eight percent of respondents dislike the long distance to major towns that offer leisure and employment opportunities. Seventeen percent dislike the lack of large shops and amenities in their local area. Poor public transport is considered a problem by a tenth of respondents.

7.20 Across rural Wales unhappiness with services and the economy varies significantly, and reveals a clear geographical pattern. The least dissatisfaction is reported by respondents from 'urban-accessible' unitary authorities such as Conwy, Denbighshire, Flintshire and the Vale of Glamorgan (35% of responses or fewer). Dissatisfaction is significantly higher in the more remote counties of Ceredigion, Powys, Pembrokeshire and Gwynedd (over 50% of responses).

7.21 Concerns over social issues account for 12% of dislikes. Crime and anti-social behaviour are the most commonly reported problems within this category, accounting for 4% of responses. Other, lesser, concerns in this category relate to attitudes towards 'incomers' (this concern is more prevalent amongst those who have moved within the last 5 years) and use of the Welsh language. Social issues appear to be of greater concern amongst the population of North Wales - particularly in the counties of Conwy and Denbighshire, where it accounts for at least a fifth of responses. Respondents in mid-Wales appear to be least troubled by such issues.

7.22 Only thirteen percent of dislikes relate to environmental concerns, with no one issue holding particular significance. Respondents from areas with relatively high rates of positive responses towards the environment are significantly less likely to have negative perceptions of their local environment.

7.23 It is clear that what one person likes about living in rural Wales another may dislike. For example, the number of responses that refer to the 'remoteness and isolation of living in rural Wales' are matched by the number that refer to the freedom of being in 'open space and the peaceful nature of the countryside'. Similar positive and negative readings of 'the same' issues can be found in other areas of concern. These contrasts reflect the diversity of the population in rural Wales and highlight the danger of making generalised assumptions about the needs, interests, perceptions and concerns of rural residents. Rural Wales is a diverse space; residents of rural Wales are equally diverse.

Key findings

- New housing development is the issue considered to cause most widespread concern across rural Wales.
 - Welsh-speakers and those in the highest income band are most likely to perceive this as a problem.
- Over half of respondents consider that new development in rural areas should be concentrated in existing towns (63%) and / or on the edge of towns (59%).
 - Respondents from households with higher income and from a higher social class are more likely to favour development in rural areas.
- A fifth of respondents like living in rural Wales because of the ‘friendliness of people / nice neighbours’.
 - This issue appears to be particularly significant for those over 65, over a quarter of whom like living in rural Wales because of the people.
- Over a third of respondents did not identify any negative perceptions of living in rural Wales.
 - Nineteen percent of ‘dislikes’ relate to the poor quality of the environment, 44% to poor quality of services, the unfavourable economy and the high cost of living, and 11% to social and cultural issues.
- Forty-four percent of people’s dislikes relate to perceptions of a poor quality of services, an unfavourable economy and the high cost of living.
 - Dissatisfaction is significantly higher in the more remote counties of Ceredigion, Powys, Pembrokeshire and Gwynedd.