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# **Sustainability Survey 2011 Headline Report**

Prepared for: **Land, Nature and Forestry Division, Welsh Government**  
Prepared by: **A consortium of Ipsos MORI, AD Research and Cardiff University**

Ipsos MORI Ltd  
Ipsos MORI House  
79-81 Borough Road  
London SE1 1FY

Tel: 020 7347 3000  
Fax: 020 7347 3800  
Website: <http://www.ipsos-mori.com/>  
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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government.

For further information, please contact:

**Land, Nature and Forestry Division**

Welsh Government

Rhodfa Padarn

Aberystwyth

Ceredigion

SY23 3UR

Tel: 0300 062 2301

Email: [environmentalevidence@wales.gsi.gov.uk](mailto:environmentalevidence@wales.gsi.gov.uk)



AD Research & Analysis Ltd



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## Context and objectives

In 2009, the Welsh Government launched the new Sustainable Development Scheme *One Wales: One Planet* in May 2009. This scheme defined sustainable development as enhancing the economic, social and environmental wellbeing of people and communities, achieving a better quality of life for our own and future generations in ways which promote social justice and equality of opportunity; and enhance the natural and cultural environment and respect its limits.

The scheme affirmed that sustainable development will be the central organising principle of the Welsh Assembly Government and set out the steps that the Welsh Government is taking to fully embed this approach.

In support of its overall aim to further sustainable development, the Welsh Government commissioned a segmentation survey to help target and support interventions designed to deliver more sustainable behaviours. The Department of Environment, Sustainability and Housing (DESH) within the Welsh Government appointed a partnership to deliver the segmentation, led by Ipsos MORI, and supported by Andrew Darnton (at AD Research and Analysis) and Wouter Poortinga (from Cardiff University).

The study included primary research, with a sample of over 1,500 interviews from across Wales. This report presents the findings from the survey which explored various dimensions of sustainability including values, beliefs, attitudes and behaviours.

While covering values, beliefs and attitudes from across the three pillars of sustainability: economic, environmental and social; the behaviours that the survey focuses on are pro-environmental behaviours. This provides the Welsh Government and its partners with a detailed understanding as to the extent to which behaviours are being contemplated, adopted and maintained by people living in Wales.

A separate technical report is available which details the segmentation process and profiles the segments themselves, with accompanying information on how to identify them.

# Method

## Questionnaire design

The questionnaire design was informed through a scoping study, which drew upon a number of key sources including:

- Defra; Surveys of Pro-Environmental Behaviour (2007; 2009)
- The Scottish Government; Scottish Environmental Attitudes and Behaviours (2009)
- Cardiff University; Energy Futures & Climate Change (2010)
- Welsh Government; Living in Wales (2008)
- Schwartz Values Survey (2004)
- New Ecological Paradigm (Dunlap / Van Liere 2000)
- World Values Survey (2004)

The identification of key pro-environmental behaviours to test was largely determined through a scoping workshop with Welsh Government colleagues in September 2010.

The questionnaire was cognitively tested by the Ipsos MORI project team with 12 survey respondents. The interviews were conducted face-to-face in a central location in Cardiff.

## Data collection

In total, 1538 survey respondents were interviewed face-to-face, between the 9<sup>th</sup> May and 26<sup>th</sup> July 2011. The survey was in-home and the average interview length was 35 minutes.

For sampling purposes the nation was divided into six regions with a target of 250 interviews set for each region to allow analysis by geography. The regions were built around local authority boundaries as detailed below.

Region	Covering Local Authority Areas of:	Number of interviews
South East	Cardiff, Newport, Monmouthshire, Torfaen, Vale of Glamorgan	258
West	Carmarthenshire, Pembrokeshire	253
North West	Gwynedd, Anglesey, Conwy	257
Mid	Powys, Ceredigion	250
South	Rhonda Cynon Taff, Neath & Port Talbot, Caerphilly, Swansea, Merthyr Tydfil, Blaenau Gwent, Bridgend	257
North East	Wrexham, Flintshire, Denbighshire	263

*Table i – Sample region*

The sample point in each region were selected at random, but Ipsos MORI controlled for rurality, selecting a representative mix of 'remote', 'rural' and 'urban' sample points within each region.

Quotas were set on gender, age and working status for each sample point. The quotas were based around the sample point geography to ensure that the survey respondents interviewed were representative of the adult population (aged 16+) in the area.

Upon completion of the survey, the data was also weighted by gender, age, socio-economic grade, tenure and working status within region to ensure the final weighted profile was fully representative of each area. Finally the sample was weighted by region to account for the disproportionate approach used to allow analysis by region.

# Report

This report guides the reader through some of the values, behaviours, beliefs and attitudes of the adult population in Wales in an environmental, economic and social context.

It is useful to distinguish between “attitudes”, “beliefs” and “values”, which are qualitatively different in the way that people hold them and in their susceptibility to change.

**Attitudes** are not very often thought about and reactions to pollsters’ questions can be easily manipulated by question wording or the news of the day. They are not very important to the respondent, are not vital to their well-being or that of their family and are unlikely to have been the topic of discussion or debate between them and their relations, friends and work mates. These are easily blown about in the winds of political comment and attention by the media. Attitudes might be described as the ripples on the surface of public opinion.

**Beliefs** derive from a deeper level of public consciousness, are held with some conviction, and are likely to have been held for some time and after some thought. Beliefs may well be evidence-based, rationally-thought-out views and, if they change, it may be because circumstances have changed or because new evidence has overturned the basis of previous attitudes. As attitudes might be seen as ripples, so beliefs are currents in public opinion.

**Values** are the deepest of all, learned parentally in many cases, formed early in life and not likely to change, and these only harden as we grow older. Values may not be evidence-based, and will tend not to be easily susceptible to rational argument; people will often hold to them even in the face of apparently-convincing reasons to change their minds. If beliefs are ripples and attitudes are currents, then values are tides in public opinion, both deep and powerful.

We understand that a change in attitude is most likely a pre-cursor to a change in behaviour and we seek to explore where such changes might be made.

Throughout this report, the topline findings from the research are illustrated in chart form, preceded by a brief overview and followed by some more in depth sub-group analysis.

These sub-group analyses are where the data are really put to work, showing any differences between the key demographic groups:

- Gender;
- Age;
- Social Grade;
- Rurality; and
- Household’s financial situation.



When reporting on these five factors, it is important to note that some will overlap (e.g. those with a high social grade status are more likely to live in a rural area and have a good financial situation). This means that if those with a higher social grade status are more likely to exhibit a certain attribute, those living in a rural area should be more likely to exhibit the same attribute.

The full data are available on request in table format, where responses are also presented by the following sub-groups:

- highest level of qualification
- work status
- household tenure
- region
- whether there is a car/van in the household
- national identity
- Index of Multiple Deprivation (IMD)
- children at home
- overall satisfaction with life
- respondent's health
- knowledge of sustainable development
- flights taken
- pride of living in Wales
- views on cause of climate change
- sustainable development and its role in decision making and lifestyle

Whilst 1,538 respondents took part in this survey, the results are presented as the opinions of the adult population in Wales. The results are subject to standard confidence intervals and these are explained in more detail within Appendix B. Any reported differences between sub-groups will be statistically significant to 95% accuracy and the standard tolerances are also presented within Appendix B.

Where comparable data are available, these are quoted.

## Standard reporting notes

Please note that totals may not always equal 100%. In some instances, this is where multiple responses were allowed for a particular question. Elsewhere, it will be due to computer rounding.

In addition, computer rounding means that combined percentage scores are not always the sum of the individual percentage scores. For example, the total

percentage “agree” will be calculated from the actual number of respondents answering “strongly agree” and “tend to agree”, and not the sum of the two percentage results.

An asterisk (\*) represents a value of less than 0.5 percent but more than zero.

Ipsos MORI’s Standard Terms & Conditions of Contract apply to this survey. No news release or publication of the findings shall be made without the advance approval of Ipsos MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

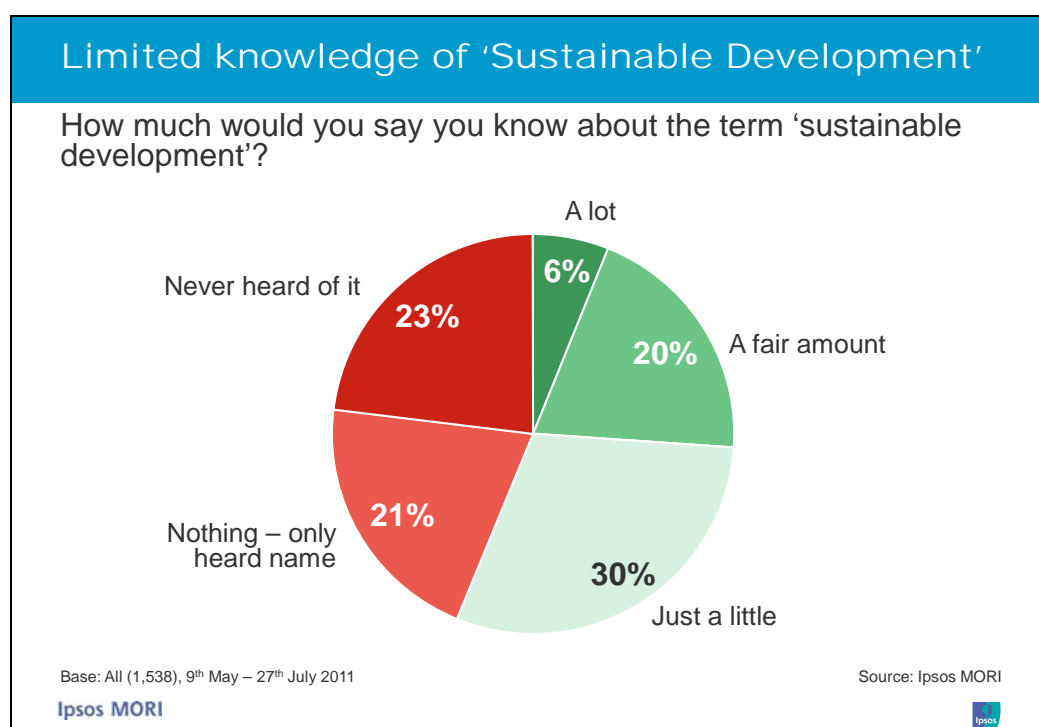
# Sustainable Development

## Understanding and support for Sustainable Development

### Knowledge of the term Sustainable Development

Knowledge of the term 'Sustainable Development' is evenly balanced, with just over a half of the adult population in Wales claiming to know at least a little about it (56%). However, almost one quarter have never heard of it and another one in five have heard of it but only in name.

Figure 1 – Limited Knowledge of 'Sustainable Development'



Claimed knowledge is noticeably higher among men living in Wales, with two-thirds knowing at least a little about the term compared to around half of women (66% vs. 47%). Conversely, almost three in ten women have never heard of it (29% vs. 15% of men).

Older members of society (those aged 75+) are the least knowledgeable, with four in every ten having never heard of the term. Over a quarter of young adults (aged 16-34) also say that they have never heard of it (27%), leaving the middle-aged (35-74) as the most knowledgeable. There is a clear opportunity to educate the public as, even among our most knowledgeable group (those aged 35-54), there are still only three in ten (29%) who would claim to know at least a fair amount about it.

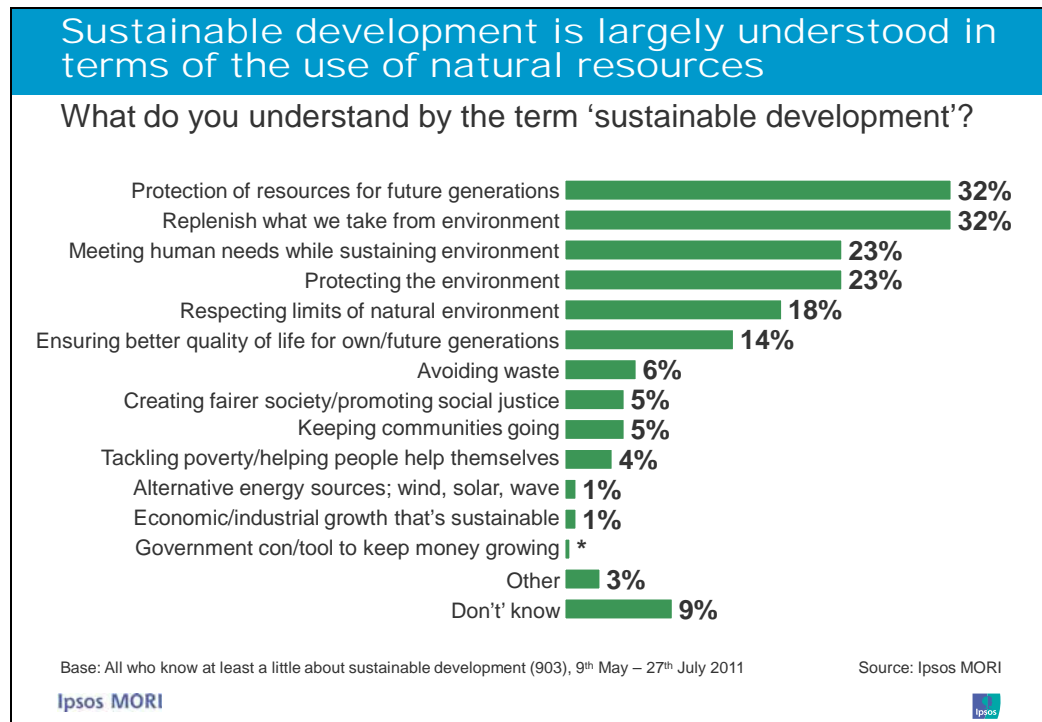
Social grade is a clear discriminator, with a steady increase in knowledge associated with higher social classification. Among those classified as 'AB' status, 81% claim to know at least a little about the term, declining steadily across the groups to just 37% among those classified as 'DE' status.

Those living in urban areas are less likely to have heard of the term (47% know nothing about it), with those in rural areas having better knowledge

(39% know nothing) and those in remote areas better knowledge still (down to 34%).

The term sustainability is largely understood in terms of natural resources as opposed to social justice. Nine out of every ten adults who claimed to know at least a little about Sustainable Development were able to describe a key feature of it, with only one in ten (9%) saying that they ‘don’t know’ what they understand by the term. ‘Protection of resources for future generations’ and ‘replenish what we take from the environment’ were the top mentions with almost one third mentioning each.

*Figure 2 – Sustainable development is largely understood in terms of the use of natural resources*

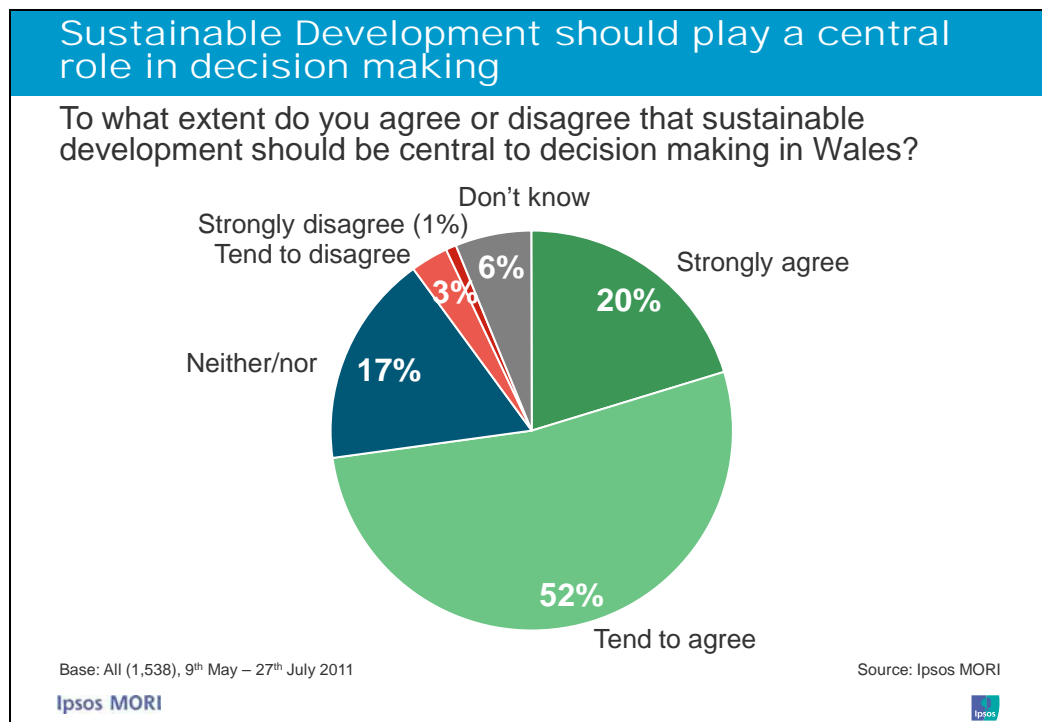


Again, social class is a discriminator among those with claimed knowledge of Sustainable Development, with 19% of those classified as ‘DE’ being unable to illustrate their understanding and saying they ‘don’t know’ what they understand by the term. This could be a genuinely lower lack of knowledge, it could just be that they are unable to articulate their thoughts, or it could be that this group ‘over-claimed’ knowledge at the previous question.

Respondents were allowed to mention as many items as they could think of and those living in remote areas mentioned a lot more than either those in urban, or just rural, areas. Almost all of the descriptions in the chart above were significantly more likely to be mentioned by those in remote areas indicating that knowledge of the term was higher among this group.

After being read a brief description of the term 'Sustainable Development', almost three-quarters agree it should play a central part in decision making in Wales.

*Figure 3 – Sustainable Development should play a central role in decision making*

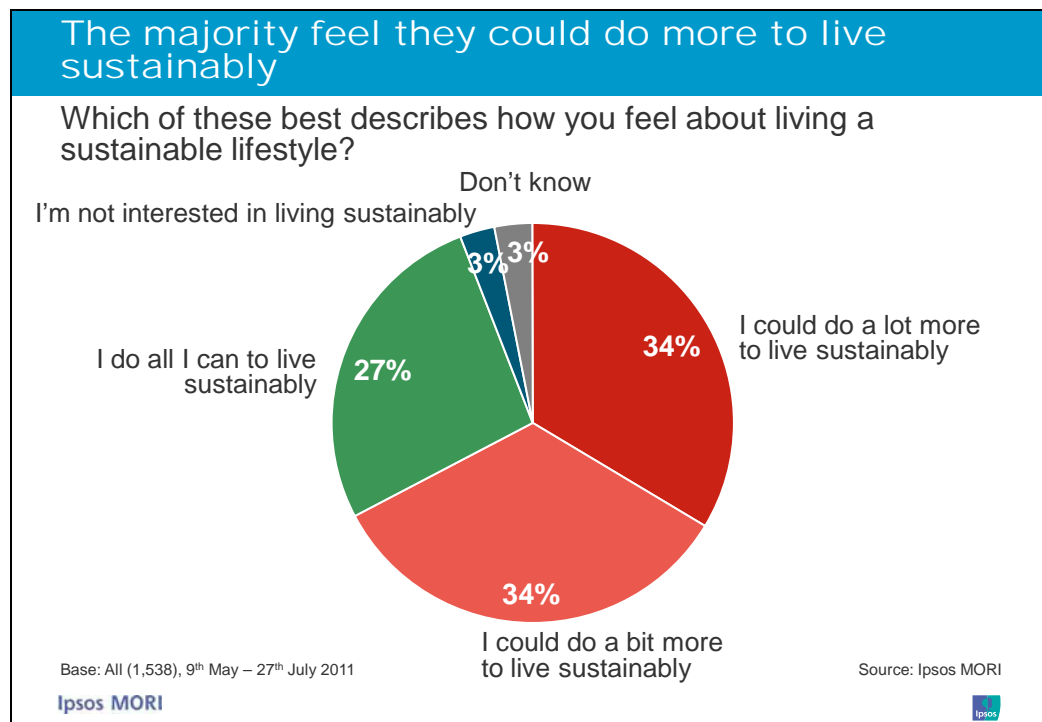


Whilst the age and gender of the respondent makes little difference here, social grade again plays its part, with 86% of those classified as 'AB' status agreeing that it should play a central role (27% strongly agree) falling to 64% of those in the 'DE' classification (18% strongly agree).

Those living in remote and rural areas were more likely to agree, although only by nine percentage points over those in urban areas (78% vs. 69%).

Just over two-thirds of the adult population in Wales feel that they could either do 'a bit more' or 'a lot more' to live sustainably, with approximately one quarter feeling that they already do all they can. Most are willing to improve with very few not interested in living sustainably (3%).

*Figure 4 – The majority feel they could do more to live sustainability*



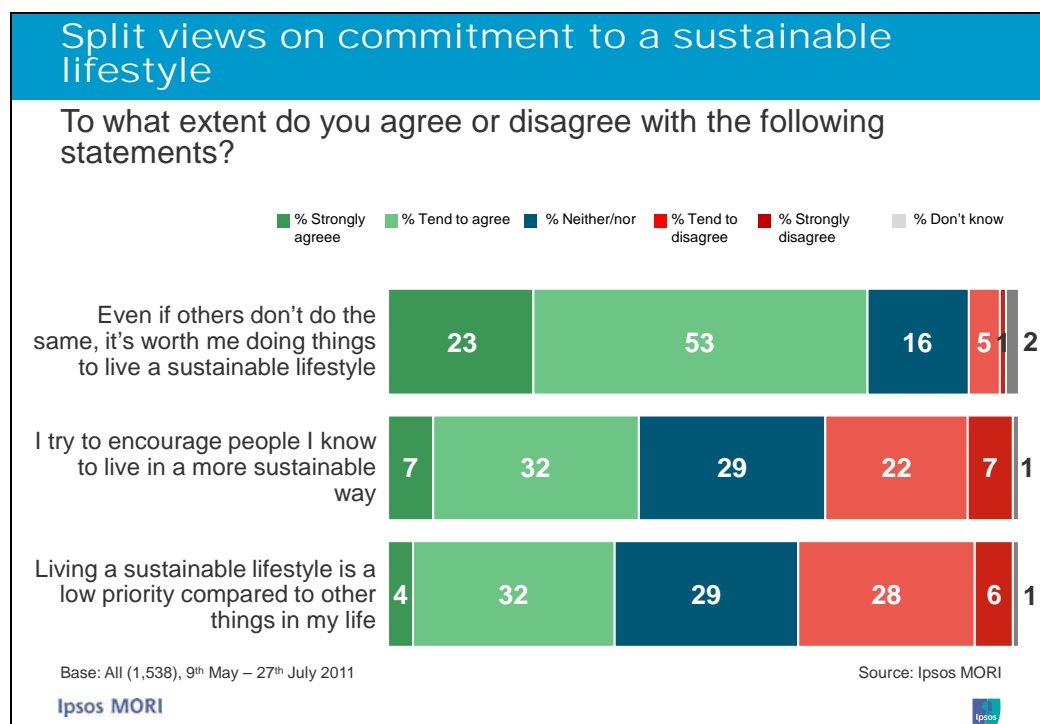
Older members of society are far more likely to believe that they are already doing all they can to live sustainably; half of those aged 75+ claim this (49%) falling steadily across the age groups to 16% among those aged 16-34. Roles are reversed at the other end of the spectrum with 79% of those aged 16-34 saying they could do more compared to 39% of those aged 75+.

Those in the lower social classifications are more content with their level of sustainability, with 31% of those classified as 'DE' believing that they are doing all they can compared to 18% of those classified as 'AB', with a contrasting feeling about being able to do more (60% vs. 80% respectively).

There is a clear feeling among the majority that it is worth living a sustainable lifestyle even if others don't do the same (76% agree), although opinion is evenly split as to whether it is a priority. There is also quite an even split between those who try to encourage people they know to live in a more sustainable way and those who do not.

Note that the way statement three in the chart below has been presented implies that agreeing is 'not a good thing' and, while the response options could have been reversed in the chart for that statement, they have been kept in line with the others.

Figure 5 – Split views on commitment to a sustainable lifestyle



Younger adults are more likely to agree that living sustainably is a low priority for them compared to other things in their lives (44% vs. 31% of those aged 75+), but belief in the benefits of living sustainably and the act of encouraging others to do so do not vary by age.

Those from higher social grades 'AB' see living sustainably as a higher priority compared to other things in their life (44% disagree that it is a low priority compared to 26% with 'DE' status), and are more likely to agree that it is worth them doing so even if others do not (86% vs. 70% with 'DE' status).

Those living in rural or remote areas feel the same, being more likely to disagree that it is a low priority for them (41% and 38% respectively vs. 29% urban) and more likely to agree that it is worth their while even if others do not (83%, 82% and 72%). Those in rural and remote areas are more likely to try and encourage other people to live sustainably (44% and 47% vs. 36% urban), as are those whose household are in a 'good' financial situation (43% vs. 38% 'bad').



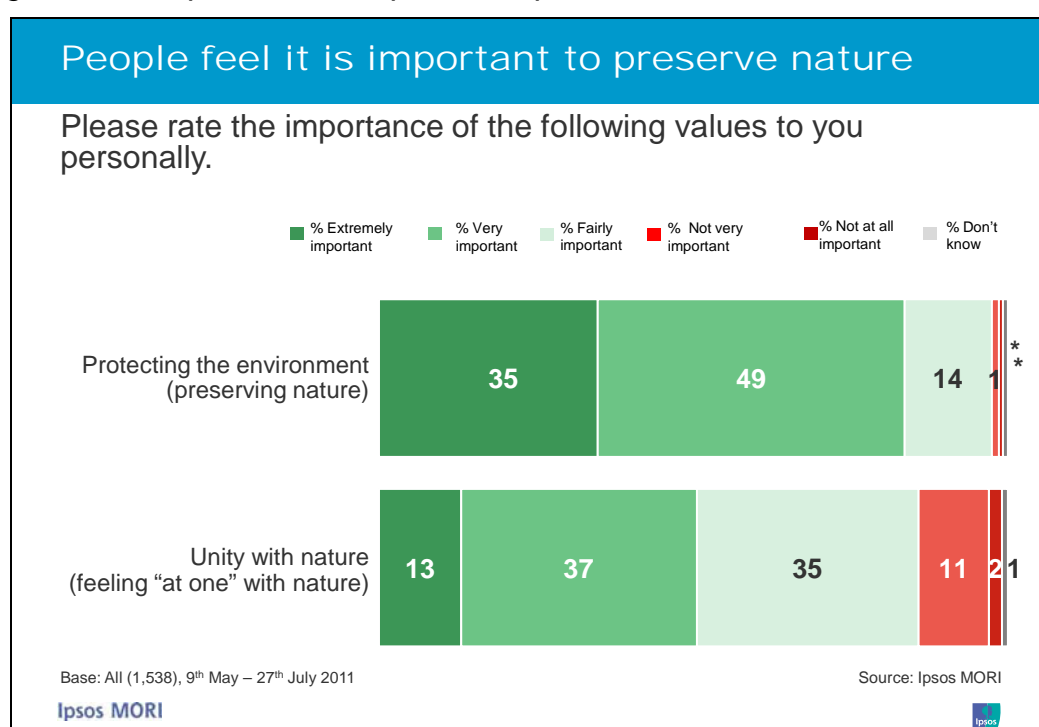
# Environment sustainability

## Environmental values

As mentioned earlier, values are the deepest held opinions and the vast majority of the Welsh population rate protecting the environment as at least 'fairly important' (only 2% think it is either 'not very important' or 'not important at all'). The strength of opinion is strong, with over a third considering this to be 'extremely important' and half to be 'very important'.

'Unity with nature' is a value which is not quite so strongly held, with 13% thinking it to be 'extremely important' and 14% either 'not very important' or 'not important at all'.

Figure 6 – People feel it is important to preserve nature



Women in Wales are more likely to hold the core value 'protecting the environment' as being an important one (88% consider it either 'extremely important' or 'very important' vs. 81% of men) and are also more likely to think that unity with nature is important to them (54% vs. 46%).

Older members of society consider unity with nature as more important than younger members (56% of those aged 75+ vs. 43% aged 16-34).

Those in the 'AB' social grade hold a similar view in terms of protecting the environment being important (89% vs. 81% in 'DE' classification).

Those living in rural or remote areas are more likely to believe that protecting the environment is important to them personally, although only by five percentage points over those in an urban area (88% vs. 83%) and that unity with nature is important (60% in remote areas vs. 46% urban).

## Reported pro-environmental behaviours

People living in Wales claim to have widely adopted energy saving behaviours. All of the things on the list are being done by at least half of the population with the intention of keeping it up. Very few have tried and given up but there are a few behaviours which could be improved as some have not thought about doing them before – 14% haven't thought about washing their clothes at 30 degrees or less, for example.

It is commonly accepted that there is often a gap between survey respondents claimed behaviours and their actual behaviours. This is a challenge that all surveys of this nature face and similarly high levels of claimed behaviour are recorded on Defra's 2009 survey of Environmental Behaviours<sup>1</sup>. To some extent, the explanation for this behaviour gap might lie in a social desirability bias, with survey respondents wanting to be seen to be doing the right thing. Another explanation is that they simply have a misperception of how frequently they actually do behaviours.

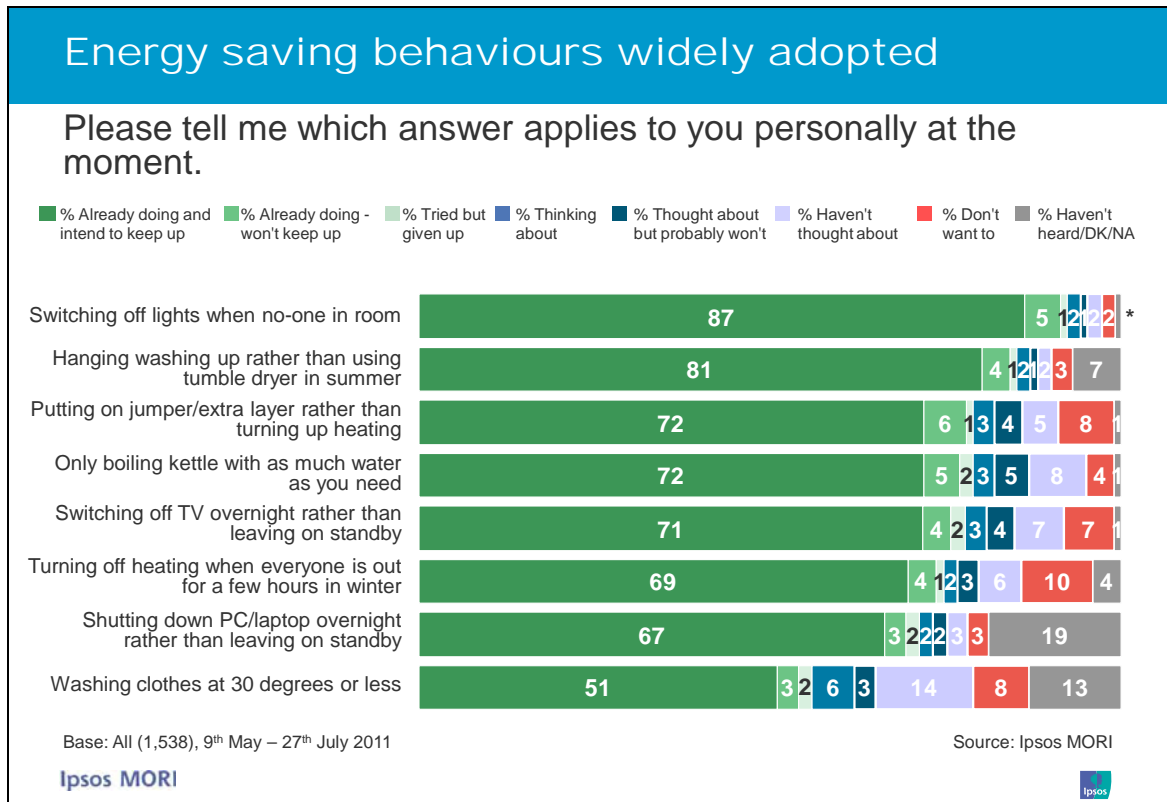
A small proportion of people just don't want to perform some of these behaviours but the largest of these groups is the 10% who don't want to turn the heating off when everyone is out. Some measures have been distorted by the number of people for whom the behaviour is not applicable (i.e. switching off a PC/laptop overnight).

'Only boiling the kettle with as much water as you need' was asked on the Defra 2009 survey. In England, Defra found that 84% of adults were already doing this, compared to the 72% we found doing it in Wales. However, this finding must be treated with some caution as two answers were combined in the Defra study to reach this score, 'I'm already doing this and intend to keep it up' and 'I'm already doing this, though I'd like to do it more'.

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<sup>1</sup> Defra/Energy Saving Trust – *Environmental Attitudes and Behaviours* (2009). Base size = 2,009 adults aged 16+

Figure 7 – Energy saving behaviours widely adopted



Nearly all of these behaviours are most prevalent among those aged 35-54.

Women are more likely to hang washing up, with 85% already doing this and intending to keep it up (vs. 77% of men), are more likely than men to put on an extra jumper rather than turning up the heating (75% vs. 69%) and are washing their clothes at 30 degrees more often (59% vs. 42%). However, we can't be sure whether this is because men are less likely to be doing any laundry overall or because women are happier to wash their clothes at 30 degrees.

Turning off the heating when everyone is out is less likely among the elderly (22% of those aged 75+ don't want to compared to 7% of those aged 16-34) as is not wanting to turn off their TV overnight (13% among those aged 75+). Boiling only the water you need is more likely among the older age groups (78% among those aged 55+ and 60% among 16-34 are already doing this and intend to keep it up) and shutting down a laptop overnight appears less prevalent among those aged 75+, although almost two-thirds of this group (65%) say that it is not applicable to them.

Those with a 'bad' household financial situation are more likely to turn off the heating when everyone is out (78% vs. 66% in a 'good' situation), presumably in an effort to save money. Shutting down a laptop overnight seems less prevalent among the 'DE' social grade classification, although 34% say that it is not applicable to them (vs. 5% of 'AB').

Those living in a rural area are more likely to hang their washing up rather than using a tumble dryer in the summer (89% vs. 79% urban) and are also more likely to wash their clothes at 30 degrees or less (56% vs. 48%), most likely an indication of how much outside space they have available.

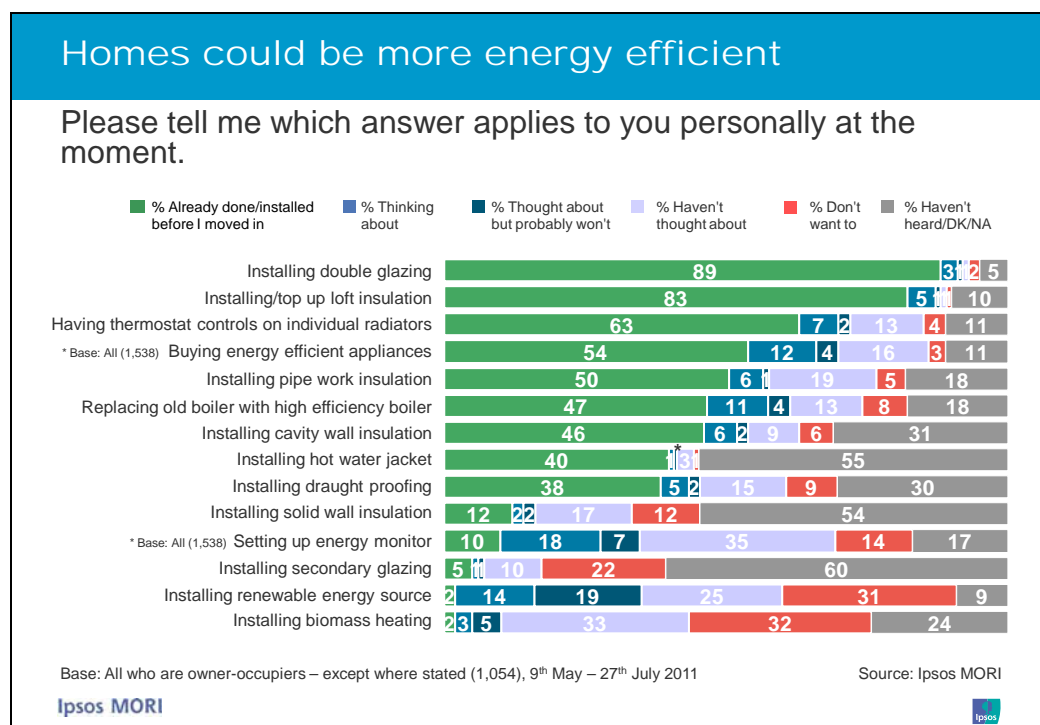


While most adults living in Wales engage in energy saving behaviours around the home, there is clear potential to make homes more energy efficient. Nine out of every ten homes have double glazing installed and almost as many have loft insulation. However, as we read down the list, fewer and fewer homes have the items installed and more and more are things which the owner/occupier has not thought about before or simply doesn't want to install.

One area which could be targeted would be setting up an energy monitor in the home; over one third (35%) have not thought about doing this yet, much more than the 10% who have already done it and the 14% who have thought about it but do not want to do it.

Most modifications have similar prevalence in Wales as they do in England when compared to the Defra 2009 study. In England, owner/occupiers are more likely to have cavity wall insulation installed (57% vs. 46% in Wales) and to have draught exclusion installed (46% vs. 38%). Again, these comparisons should be treated with caution as the code 'This was already there or installed before I moved into the property' was not included on the Defra questionnaire.

Figure 8 – Homes could be more energy efficient



In general, younger age groups are less likely to have thought about installing most of these energy efficiency improvements within their home, while the older groups are more likely to have installed the feature themselves. Those in lower social groups are also more likely to have some improvements installed in their home (such as loft insulation and double glazing).

There is opposition to installing renewable energy sources among the older age groups, with 45% of those aged 75+ not really wanting to do this (vs. 26% aged 16-34). There is also opposition among those with a lower social classification (41% in the 'DE' classification vs. 25% 'AB') and among those living in an urban area (36% vs. 21% rural).

Older age groups also express opposition to biomass heating (43% aged 75+ vs. 19% 16-34) and energy monitors (21% aged 75+ vs. 13% 16-34). A lack of awareness of energy monitors is higher in the 'DE' social classification (20%) than among those in the 'AB' classification (7%).

Those in rural areas are more likely to have installed draught proofing in their home, while those in urban areas are more likely to have double glazing but also more likely to say that they don't want to have secondary glazing installed. Those in a remote area are far more likely to have installed a jacket over their hot water tank.

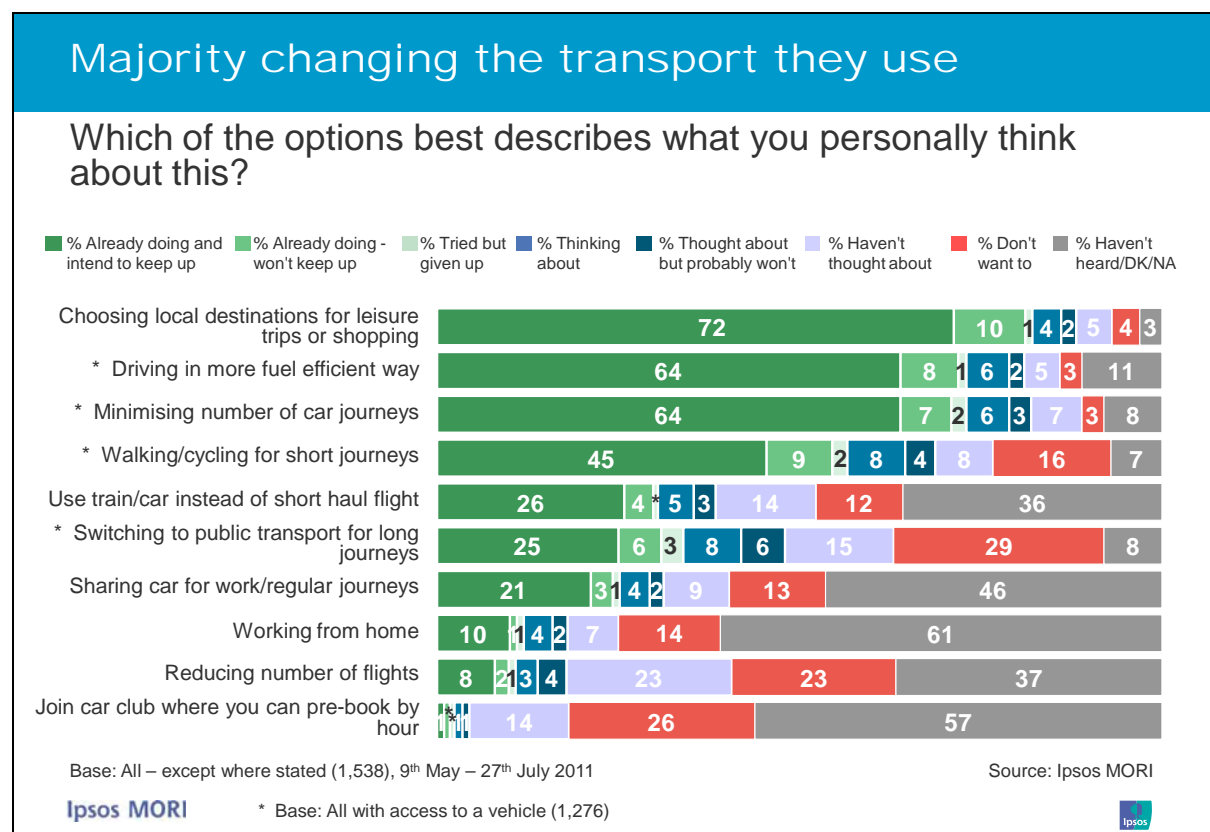
Those in the 35-54 age group are the most likely to buy energy efficient appliances (62% have already done this), with those aged 55-74 close behind (59%), ahead of those aged 16-34 (40%) and 75+ (38%). Also more likely to buy these appliances are those in the higher social grades and those in a 'good' financial situation. Solid wall insulation is not something which those in worse financial situations are thinking about as much as those in a 'good' situation.

Travel behaviour is becoming more environmentally friendly, although there are some items which are opposed by quite large sections of the public. Three in ten people are not willing to switch to public transport for long journeys and a quarter are not willing to join a car club, or to reduce the number of flights they take.

A large number have not thought about doing some of these things, notably almost a quarter have not considered reducing the number of flights they take.

The 2009 Defra data show that adults in England are more likely to have switched to cycling or walking for short journeys (62% vs. 45% in Wales) and are more likely to drive in a fuel efficient way (78% vs. 64%).

Figure 9 – Majority changing the transport they use



Younger adults are more likely to already be cycling or walking instead of driving for short journeys and planning to keep it up (49% aged 16-54 vs. 20% aged 75+), as are those in the higher social groups (49% among those in the 'AB' group and 52% in the 'C1' group compared to 38% in the 'DE' group), those living in an urban area (49% vs. 32% in a remote area) and those in a 'bad' financial situation (56% vs. 46% in a 'good' situation).

Older adults prefer to drive in a more fuel efficient way (71% aged 75+ vs. 48% 16-34) and to minimise the number of car journeys (69% aged 75+ vs. 55% aged 16-34) but the younger adults are more likely to share a car for regular journeys (29% aged 16-34 vs. 12% aged 75+).

Those aged 55-74 are the least likely to want to reduce the number of flights they take for environmental reasons (28% vs. 23% overall) as are those from the 'AB' social classification (29% vs. 15% 'DE').

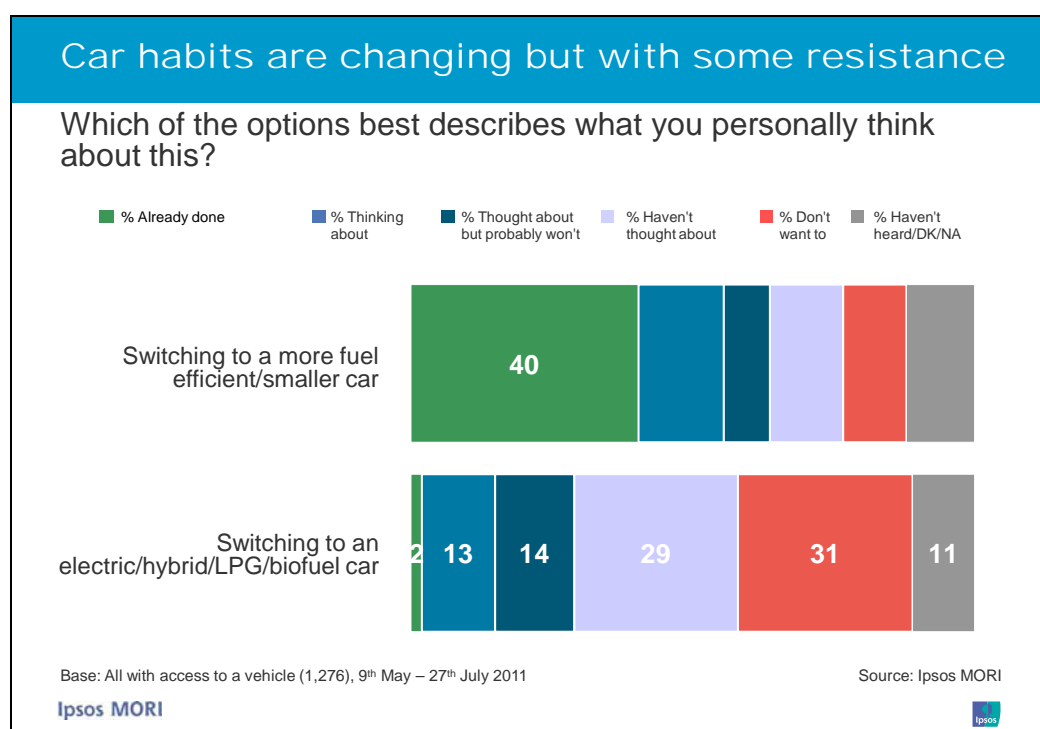
Those in a remote area try to minimise the number of car journeys they take (75% are already doing this vs. 60% in an urban area) and are more likely to be working from home (21% vs. 9% urban). Those in the higher social grades are more likely to use a train or car instead of a short haul flight (35% 'AB' vs. 17% 'DE'), although those in the 'AB' category are more taking more flights per year and so are more likely to be thinking about giving it up.

Car habits are changing to be more energy efficient, with four out of ten adults in Wales who have access to a vehicle having already switched to a more efficient or smaller car and a further 15% thinking about doing so. Only 2% have switched to an electric, hybrid, LPG or biofuel car so far but 13% have thought about doing so.

However, there are a large proportion who are resistant to change, with one in ten not wanting to switch to a smaller, more efficient car and almost one third not willing to switch to an electric or hybrid car. A similar proportion say they have not thought about doing either of these things so there is potential to raise awareness.

While not many have switched to an electric / hybrid / LPG car, there is less resistance within Wales than in England, the Defra 2009 study found that 36% of adults in England don't want to switch, compared to 31% in Wales.

*Figure 10 – Car habits are changing but with some resistance*



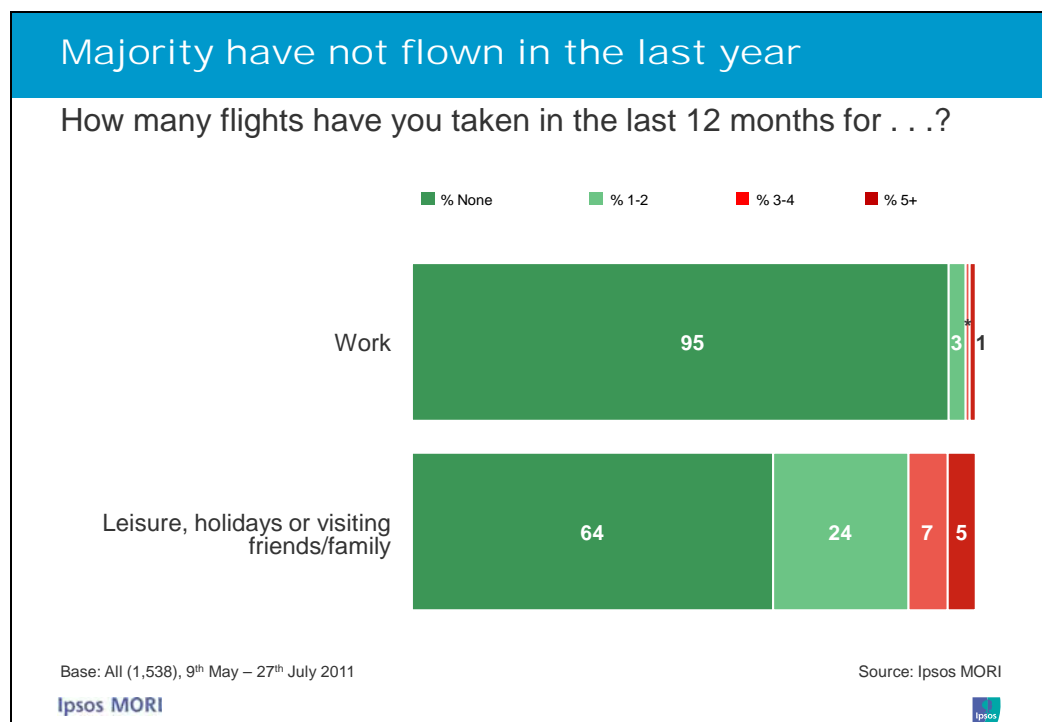
Women are more likely to have already switched to a more fuel efficient or smaller car (44% vs. 37% of men), as are those in the higher social groups (51% in the 'C1' group and 42% in the 'AB' group vs. 31% 'DE'). Those aged 75+ are more likely to say that they don't want to do this (17% vs. 8% of those aged 16-54).

Older adults also show more resistance to electric / hybrid cars; almost half don't want to switch (45%) versus a quarter of those aged 16-34.



Over one third (36%) of adults living in Wales have flown for leisure in the last 12 months, while 5% have done so for work. Most of those who have flown for leisure in the last 12 months have done so either once or twice but 12% have flown three or more times.

Figure 11 – Majority have not flown in the last year



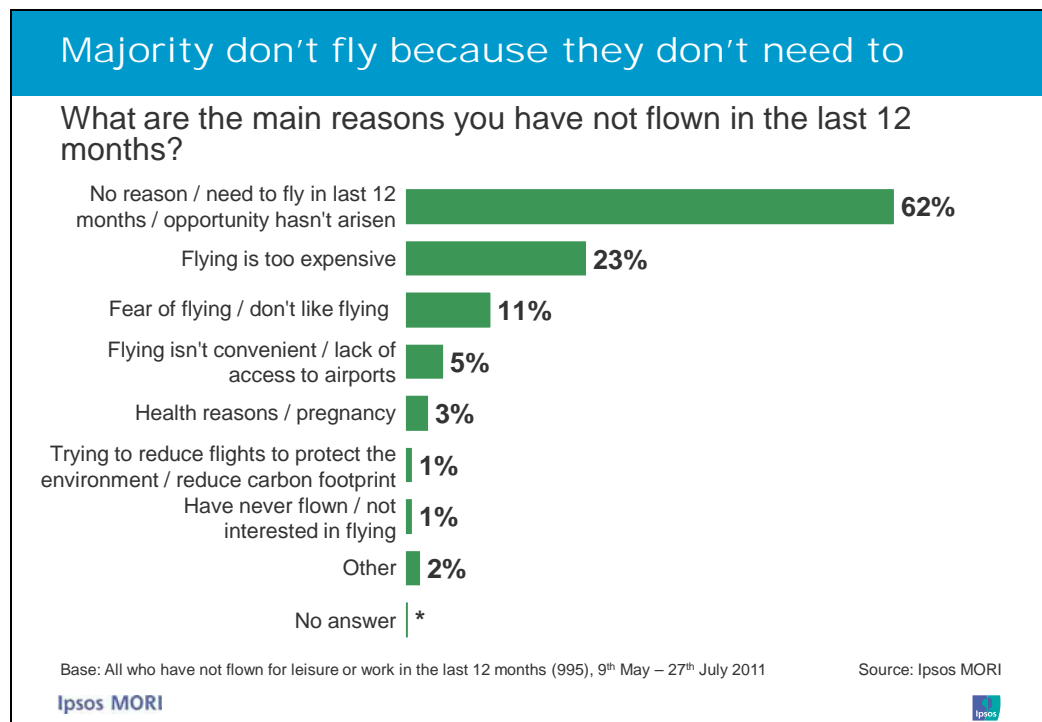
Flying for leisure is far less likely amongst the elderly; 17% of those aged 75+ compared to; almost four in ten of those aged under 75.

Those in higher social grades also take more flights, with 53% in the 'AB' classification having taken at least one in the last 12 months for leisure, compared to 20% in the 'DE' classification. There is a similar situation among those who describe their household financial situation as 'good'; they are more likely to fly for leisure than those who describe it as 'bad' (41% vs. 22%).

Work flights are taken more often by men (8% vs. 2% women), by those aged 35-54, by those in the higher social groups and by those with a 'good' financial situation. Overall, urban dwellers take more flights than those in other areas (39% vs. 28% remote and 31% rural)

Those who have not flown in the last 12 months for either work or leisure are most likely not to do so because they simply don't have the need (62%), with almost one quarter saying that flying is too expensive. Only 1% have not flown because they are trying to reduce their carbon footprint.

*Figure 12 – Majority don't fly because they don't need to*

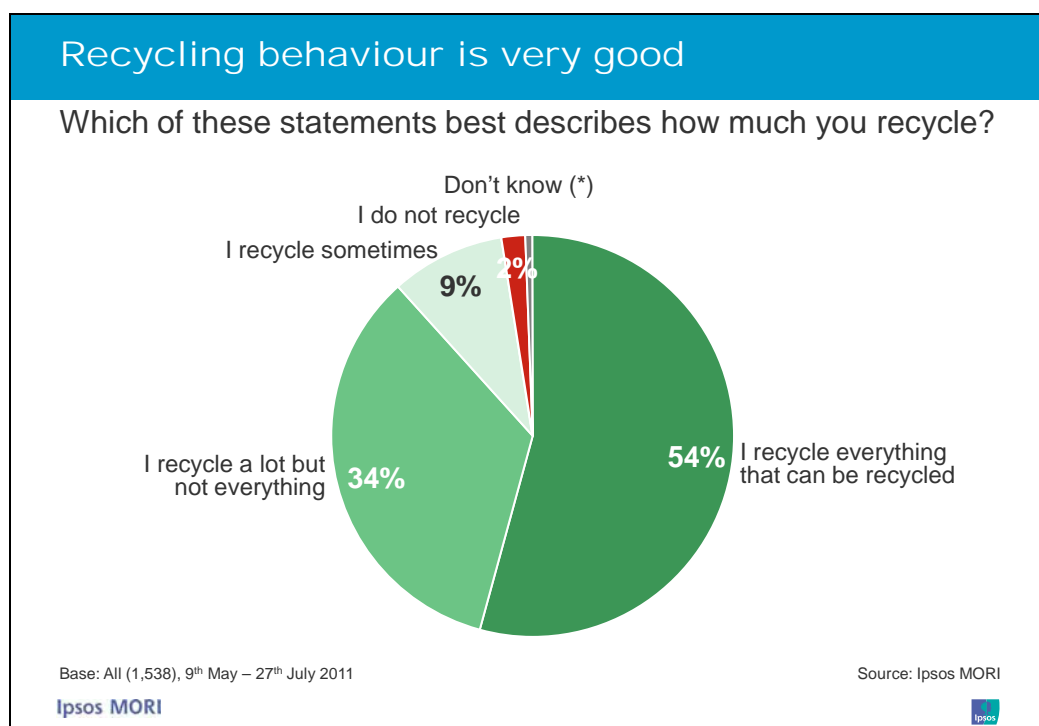


Younger people say that flights are too expensive while older people are more likely to be afraid of flying. Those in the 'DE' classification are also more likely to say that it is too expensive (31% vs. 8% in the 'AB' group), as are those in a 'bad' financial situation.

The most active group in reducing flights because of environmental reasons are those living in a remote area, where 5% have cut down the number of flights they take for this reason.

Recycling is an accepted norm across Wales. Over half of adults in Wales (54%) claim that they already recycle everything that can be recycled, with a further third recycling a lot but not everything. One in fifty (2%) do not recycle at all.

*Figure 13 – Recycling behaviour is very good*



Young people bring the average recycling figures down, with 39% aged 16-34 recycling everything, compared to an average of 60% for those aged 35+.

Those in higher social grades recycle more, as do those in a 'good' financial situation.

Many waste behaviours are highly prevalent in Wales, with the majority giving away unwanted items and taking their own bags when shopping<sup>2</sup>, among other things.

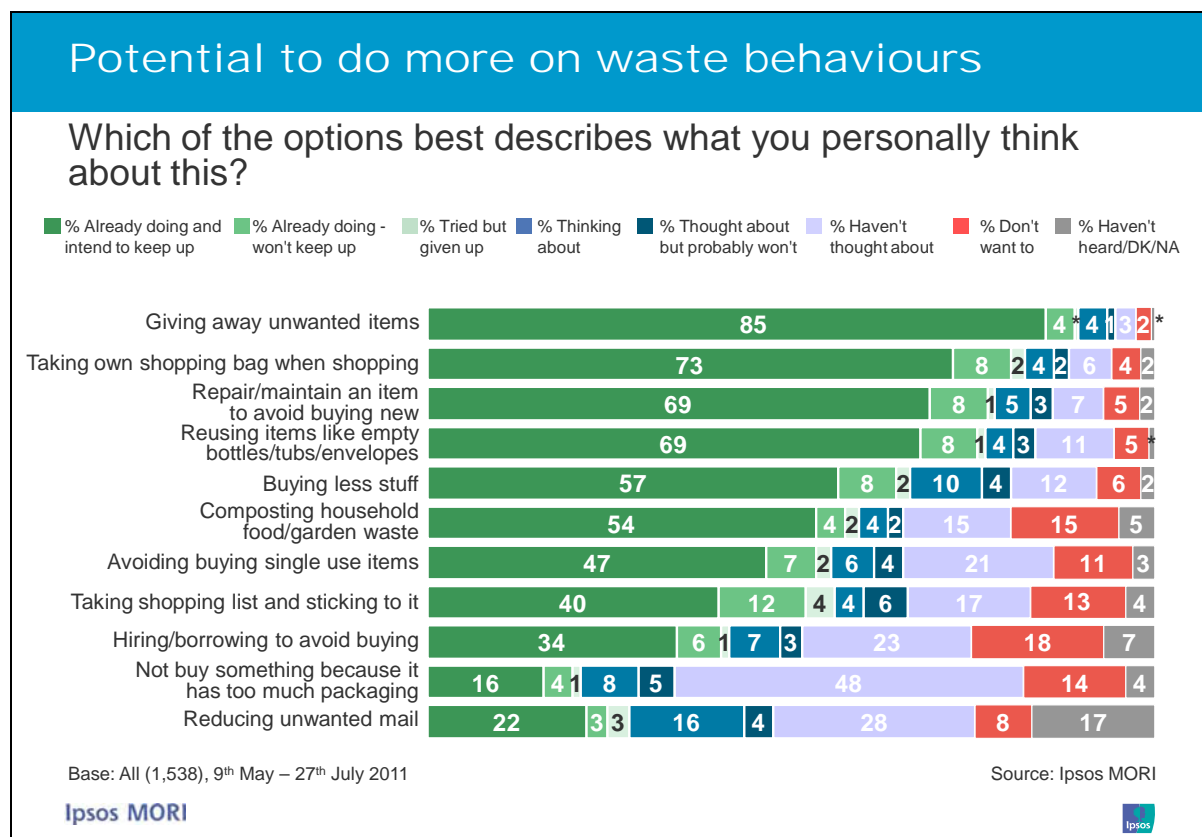
While there are some things that people are not willing to do, such as the 18% who don't want to hire or borrow things to avoid buying them and the 15% who don't want to compost their waste, a lot of these items might be improved if people actually thought a bit more about doing them. Almost half haven't thought about not buying something because it has too much packaging, for example.

Some of these questions were asked in England in the Defra 2009 survey and, although the permitted responses were not exactly the same, we find those living in Wales less likely to decide not to buy something because it has too much packaging (16% are doing this and planning to keep it up, compared to 21% in England) or to take their own bags when going shopping (73% vs. 75% in England). Those living in Wales are more likely to re-use items such

<sup>2</sup> Please note the fieldwork for this survey was completed before the introduction of the 5p charge for disposable carrier bags in Wales on 1 October 2011.

as empty bottles and jars (69% vs. 66%) and to compost their household's food and/or garden waste (54% vs. 43%).

Figure 14 – Potential to do more on waste behaviours



More women are deciding not to buy something because it has too much packaging than men (25% vs. 14%), as are those from the higher social grade classifications (28% 'AB' vs. 13% 'DE'). Women are also more likely to reuse items like empty bottles (81% vs. 72%), as are those from the 'AB' social classification (83% vs. 73% 'DE') and those living in a remote area (85% vs. 75% urban).

Women take their own shopping bags with them more often than men (84% vs. 77%), as do older members of society (93% aged 75+ vs. 64% aged 16-34), those in the 'AB' social grade (91% vs. 73% 'DE') and those who describe their financial situation as 'good' (84% vs. 75% 'bad'). Women are also better at taking a shopping list and sticking to it than men (56% vs. 49%), as are those from the 'AB' group (66% vs. 44% 'DE').

Composting is more prevalent among older people, with two-thirds of those aged 75+ already doing this compared to 44% of those aged 16-34, as well as among those in the 'AB' social grade (70% vs. 54% 'DE', with the lowest prevalence among the 'C1' classification at 51%).

Those from the 'AB' social group are hiring or borrowing more items (45% vs. 36%), as are those from 'bad' financial households (49% vs. 39% 'good').

Men are more likely to repair or maintain an item to avoid buying something new (81% vs. 74% of women), as are those aged 35-54 (86% vs. 77%

overall), those from the 'AB' social groups (83% vs. 69% 'DE') and those in a remote (87%) or rural (82%) rather than an urban area (74%).

Men are also avoiding buying disposable items (58% vs. 51% of women), as are those aged 35-54 (59% vs. 54% overall), from an 'AB' social group (64% vs. 47% 'DE'), from a remote area (64% vs. 52% urban) and those from a household with a 'good' financial situation (59% vs. 52% 'bad').

Those aged 75+ are buying less stuff (76% vs. 52% of those aged 16-34) and those living in a remote area are also buying less (74% vs. 63% urban).

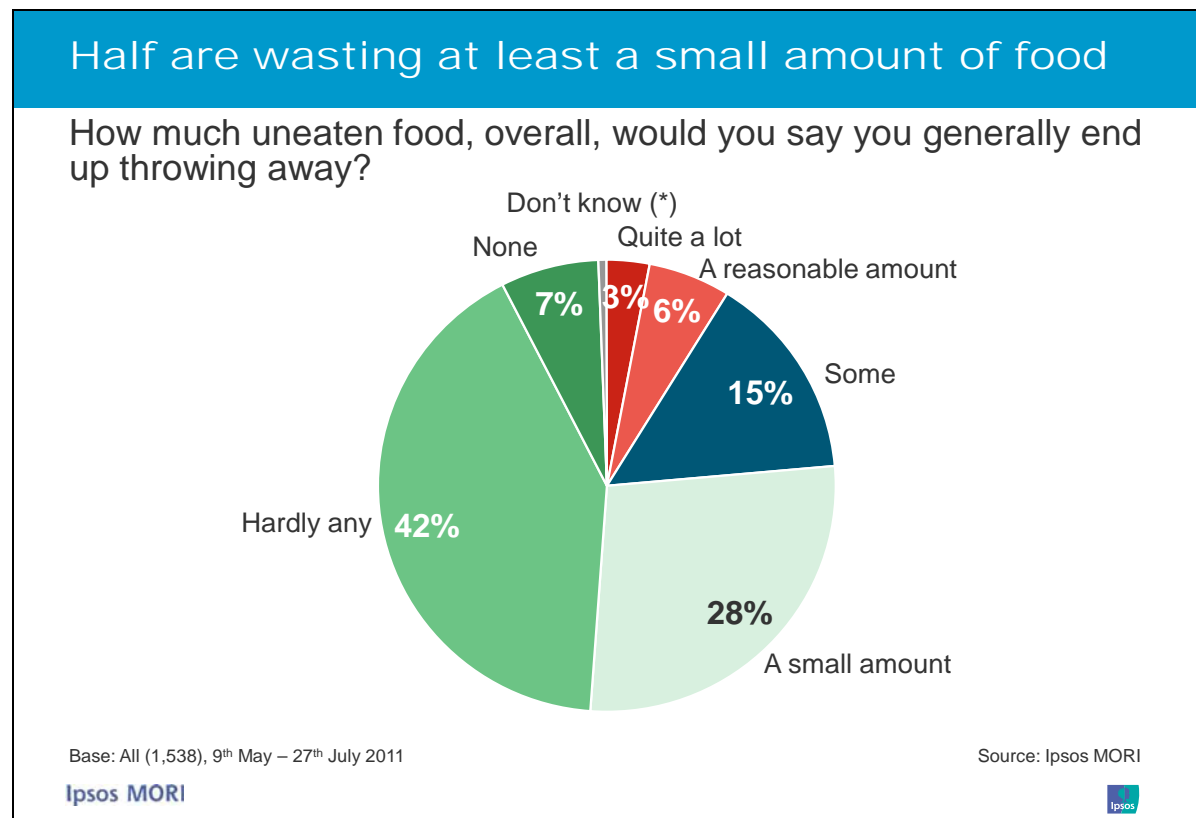
Women are giving away unwanted items (93% vs. 86% of men), as are those aged 35-54 (93% vs. 90% overall), those in the 'AB' and 'C2' social grades (93% vs. 90% overall) and those with a 'good' financial situation (92% vs. 84% 'bad').

Reducing unwanted mail is most prevalent among those aged 55-74 (30% vs. 25% overall), those in the 'AB' social group (40% vs. 15% 'DE') and those in a 'good' financial situation (31% vs. 20% 'bad').

Nearly all households end up throwing away at least some uneaten food, although most households only throw away 'a small amount' or 'hardly any'. Almost one in ten throw away either 'a reasonable amount' or quite a lot, although these are quite subjective measures.

Comparison with the Defra 2009 study shows that the same proportion of people in England and Wales throw away at least some uneaten food (92% and 93% respectively). However, those living in Wales throw away a larger amount, with 3% throwing away quite a lot (1% in England), 6% throwing away a reasonable amount (4% in England) and 15% throwing 'some' away (12% in England).

*Figure 15 – Half are wasting at least a small amount of food*



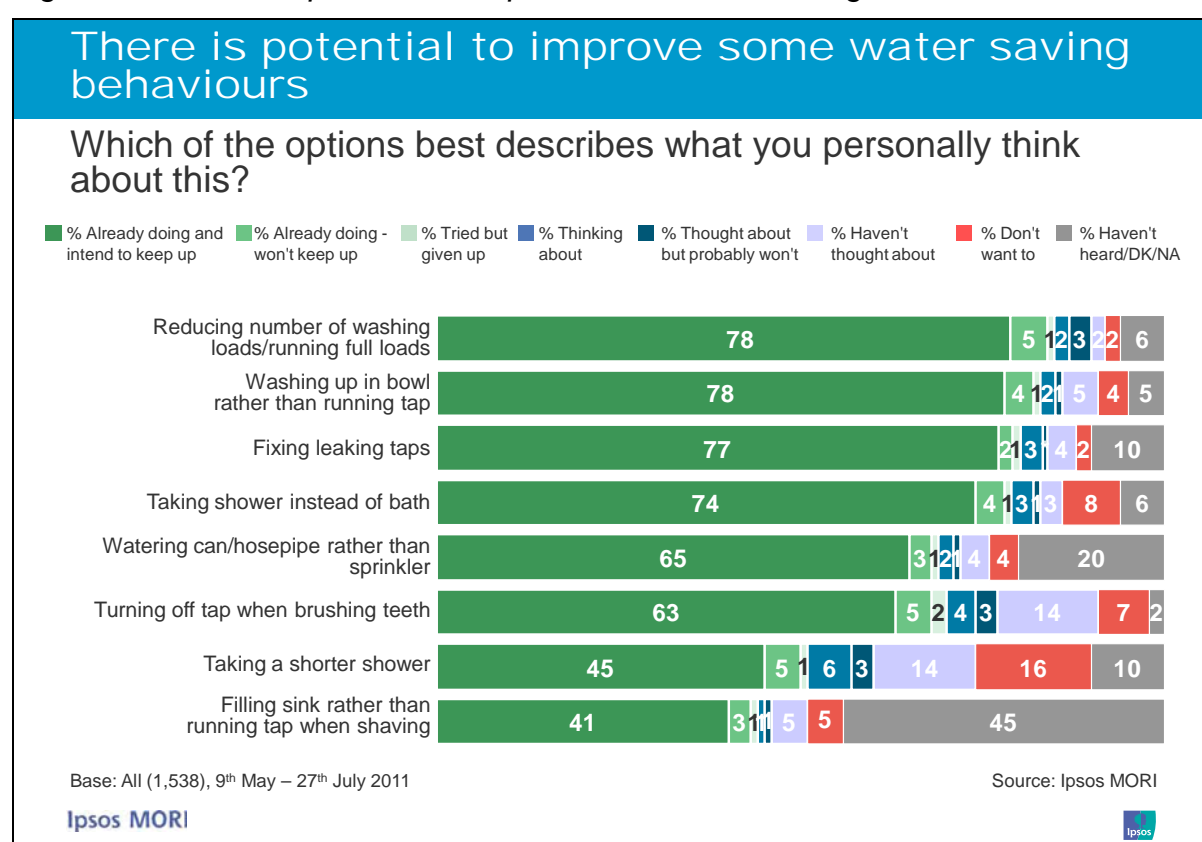
The young are wasting more food, with 39% aged 16-34 saying that they throw away either none or hardly any, rising across the age groups to 71% among those aged 75+.

Water efficiency practices within the home are being undertaken but there is improvement to be made in this area, especially in the bathroom. There is also some resistance to particular measures. Around three-quarters are already saving water by reducing their washing loads, washing up in a bowl, fixing leaking taps and taking a shower instead of a bath, however 16% say they don't want to take a shorter shower.

Again there are some adults who have not thought about some items, with 14% not having thought about turning off the tap when brushing their teeth or taking a shorter shower.

'Filling the sink rather than running the tap when shaving' appears at the bottom of this list, however, this was not applicable for almost half and so would have appeared higher if those people were excluded.

Figure 16 – There is potential to improve some water saving behaviours



Women are better at reducing the number of washing loads that they do (89% vs. 78% of men are already doing this), although men are more likely to say that this is not applicable for them (8% vs. 2% women). Those aged 35-54 are the most likely age group to already be doing this (89% vs. 83% overall), although again those aged under 35 and over 75 are more likely to say that this is not applicable for them.

Those aged 75+ are most likely to do their washing up in a bowl rather than running tap (88% vs. 79% aged 16-34) and men are more likely to fill a sink rather than run a tap for shaving men (68% vs. 21% women) although, of course, women are more likely to say that this is not applicable for them (71% vs. 14%).

Adults aged 55-74 are the most likely to fix a leaking tap in their home, with 87% already doing this, compared to 86% aged 35-54 and 64% aged 16-34. Those living in a remote area are more likely than those in an urban area to do so (90% vs. 77% urban).

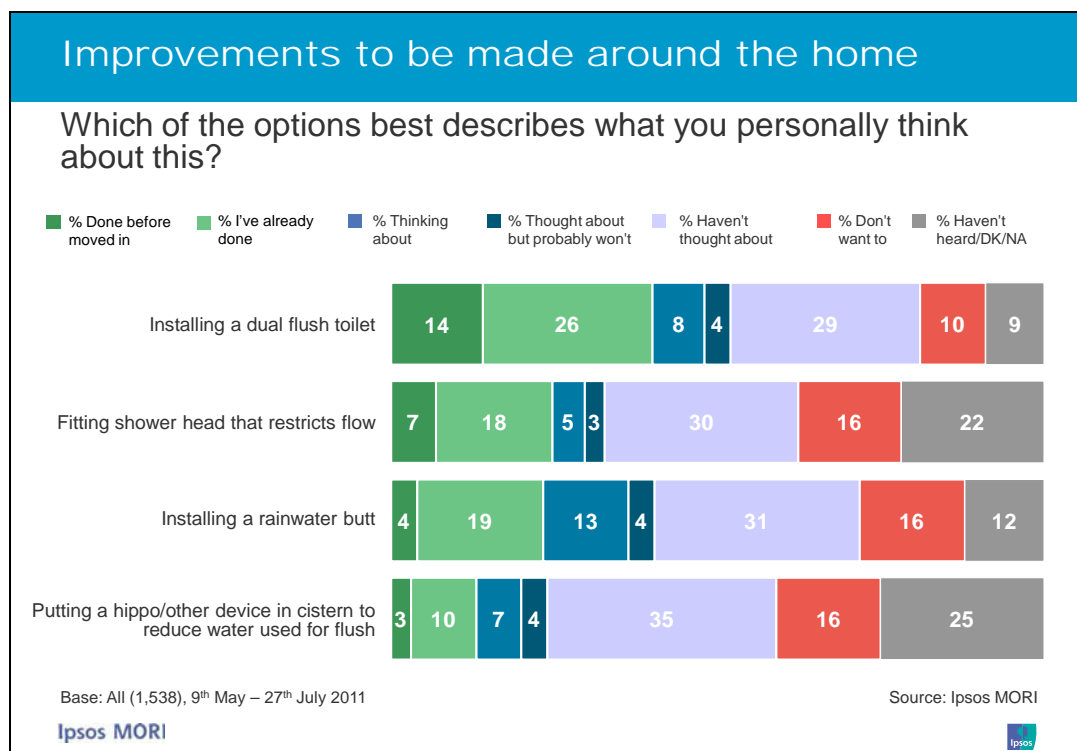
Those in the 'AB' social group are take more showers instead of baths (88% are already doing this compared to 67% in the 'DE' social group) and this group are also taking shorter showers (58% vs. 47% 'DE'). Men are more likely to be taking showers rather than baths (80% vs. 75% of women), as are those in a 'good' financial situation (81% vs. 72% 'bad').

Using a watering can rather than a hosepipe is more prevalent among those living in a remote area (85% vs. 66% urban), among those aged 55-74 (77%) and aged 35-54 (75%) (vs. 52% aged 16-34), those in the 'AB' social classification (78% vs. 59% 'DE') and among those in a 'good' financial situation (74% vs. 59% 'bad'). These groups may well also be the most likely to have larger gardens, although this was not asked within the survey. Whilst a minority have already installed some home improvements to improve water efficiency, there is at least some resistance to all of the measures and roughly one third have never thought about each of them before.

Very simple measures such as adding a hippo or other device in the cistern of the toilet have been shown to save a lot of water but over one third have never thought about doing this and only 13% of homes already have one installed.

The installation of water butts is not as prevalent in Wales as it is in England with fewer than a quarter of homes in Wales owning one (23%), compared to a third in England found during the 2009 Defra study (32%).

Figure 17 – Improvements to be made around the home





Older adults are more likely to have already installed a rainwater butt, ranging from 34% of those aged 75+ down to 7% among those aged 16-34. Those from a remote area are also more likely (31% vs. 15% urban), as are those who would describe their financial situation as 'good' (22% vs. 15% 'bad').

However, older adults are more likely not to want to install any of the other three items in their home; a dual flush toilet (17% vs. 10% overall), a hippo in the cistern of their toilet (23% vs. 16% overall) or fitting a shower head that restricts the water flow (20% vs. 16% overall). Those in urban areas agree about the hippo, with 18% not wanting to install one (compared to 9% in a remote area).

Almost one in five from the 'DE' social classification had not heard of a hippo device (19% vs. 14% overall) and this group were more opposed to the rainwater butts (20% vs. 16% overall).

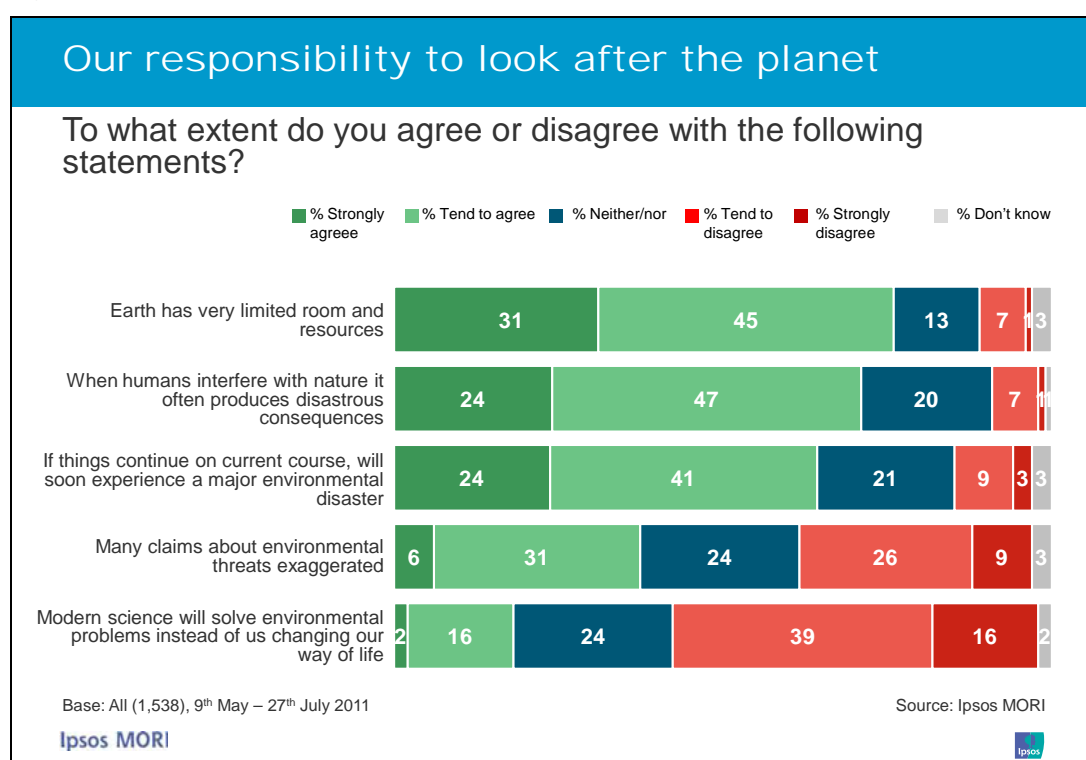
## Key environmental beliefs

The majority agree that the Earth has very limited resources and that if we continue on our current course we will soon experience a major environmental disaster, as well as thinking that humans interfering in nature often produces disastrous consequences. Opinion is split over whether claims about environmental threats have been exaggerated, however, we have not probed into the detail of *how many* claims are exaggerated or which ones.

Some put their faith in modern technology saying that it will 'solve environmental problems instead of us changing our way of life', with almost one in five (19%) agreeing that this will be the case. However, strength of this opinion is not high (2% strongly agree) and almost three times as many disagree as agree.

While the same proportion 'strongly agree' that the Earth has very limited room and resources, those living in Wales are more likely than those in England to 'tend to agree' (45% compared to 39%). Those in Wales are also more pessimistic about the future with 24% strongly agreeing and 41% tending to agree that if things continue on their current course, we will soon experience a major environmental disaster (compared to 21% and 38% in England, as found in the Defra 2009 study).

Figure 18 – Our responsibility to look after the planet



There is little discrepancy on the idea that we are heading for a major environmental disaster, however, men are more likely to disagree (14% vs. 9% women) as are older adults (15% of those aged 55+ vs. 9% of those aged less than 55).

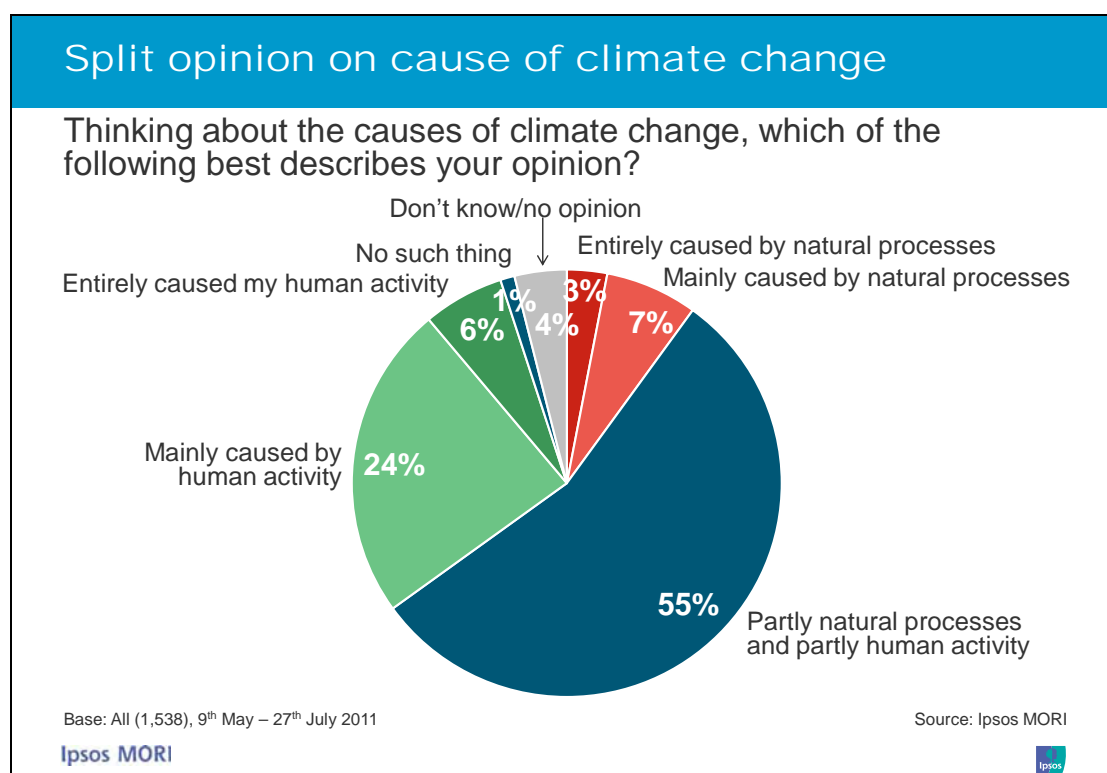
Men are more likely to agree that the Earth has very limited resources (80% vs. 72% of women), and this is also the case among the higher social groups, with those in the 'AB' group (81%) and 'C1' group (82%) being more likely to

agree than those in the 'DE' group (69%). Those living in a remote area are also more likely to agree with this statement (83% vs. 75% urban).

Older adults are more likely to think that when humans interfere with nature it often produces disastrous consequences, with 77% of those aged 75+ agreeing (vs. 60% of those aged 16-34). These older adults are also more sceptical about climate change claims, with a net agreement score of 17% (agree minus disagree) among those aged 75+ with the statement that claims have been exaggerated vs. an even split among those aged 16-34. Those in the 'DE' social group also have a higher net agreement (9%) than those in the 'AB' group (-7%, i.e. more disagree than agree).

While those disagreeing that modern science will solve environmental issues outnumber those who agree by almost three to one, men are more likely to agree with this statement than women (22% vs. 16%), as are those from a household in a 'good' financial situation (22% vs. 15% 'bad'). Those from the different social groups are equally likely to agree with this statement but those in the 'AB' classification are far more likely to disagree (68% vs. 45% 'DE'). Opinion is split on the main cause of climate change, with the majority thinking that it is a combination of both natural resources and human activity. However, three times as many people think it is caused by human activity than by natural processes (30% vs. 10%). Only 1% deny that there is any such thing as climate change.

Figure 19 – Split opinion on cause of climate change



Younger adults are more likely to believe in anthropogenic climate change (41% of those aged 16-34 vs. 21% aged 75+). Natural causes are favoured by the older members of the public, with one in five people aged 75+ thinking that they are more responsible than human activity.

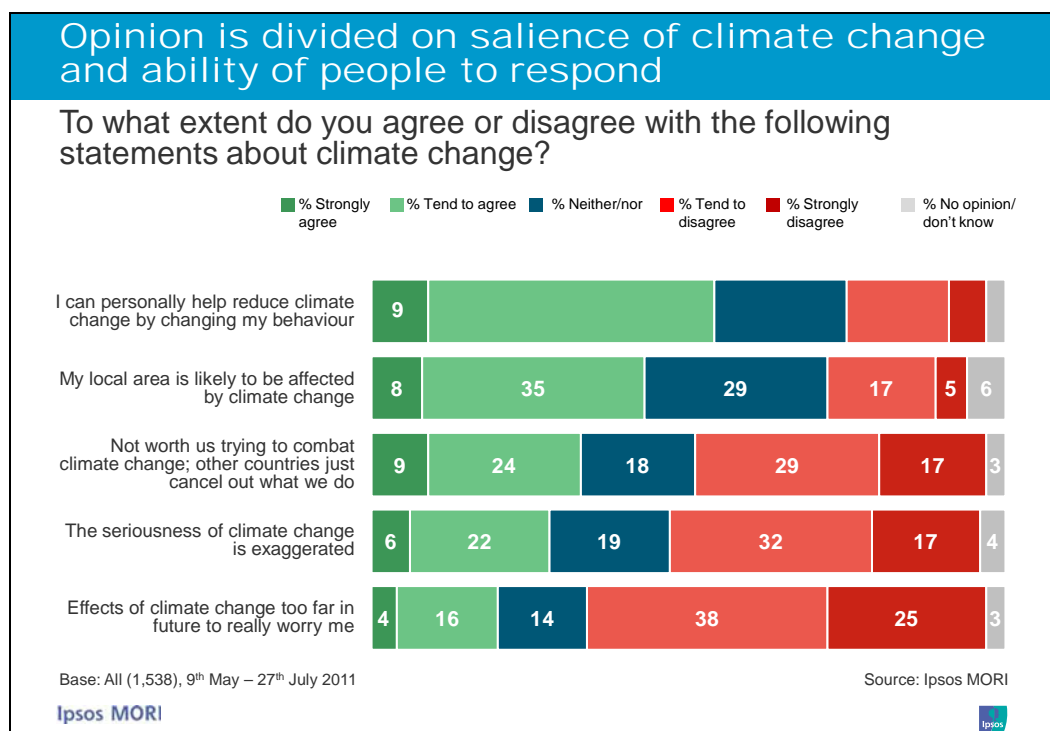
The majority feel they can personally help to combat the effects of climate change, but over one in five (22%) do not feel able to. This said only one in ten 'strongly agree' that they can play their part by changing their own behaviour. In addition one third agree that it is not worth it as other countries just cancel out what we do.

Opinion is divided on the salience of climate change. Less than half (43%) think that their local area will be affected, while just over half think the effects will be felt in their lifetime, and just under half disagree that the seriousness of climate change has been exaggerated.

Those living in Wales appear less concerned about climate change and less optimistic about how their own actions might affect it than those living in England in 2009 (Defra study). 25% in Wales 'strongly disagree' that the effects of climate change are too far in the future to really worry them, compared to 30% in England in 2009. 17% in Wales 'strongly disagree' that it's not worth Britain trying to combat climate change because other countries will just cancel out what we do compared to 26% in England.

When we compare these results to those found in a Cardiff University study in 2010<sup>3</sup>, we find that opinions in Wales have changed since 2010, with less scepticism now around climate change being exaggerated, In 2010, 15% strongly agreed and 26% tended to agree that the seriousness was exaggerated, compared to 6% and 22% in 2011.

*Figure 20 – Opinion is divided on salience of climate change and ability of people to respond*



Men are less optimistic about climate change, with over one third agreeing that it's not worth us trying to combat climate change (36% vs. 29% women),

<sup>3</sup> Cardiff University – Energy Futures and Climate Change (2010). Base size = 260 for Wales only, adults aged 15+

as are older adults (42% of those aged 75+ vs. 27% aged 16-34) and those from the 'C2' social grade (39% vs. 32% overall).

It is not surprising that older adults think that the effects of climate change will be too far in the future to really worry them, although as many disagree even among this age group as agree (42% agree and 41% disagree), compared to the most concerned group, those aged 35-54 where 12% agree and 73% disagree. Those from the 'DE' social group are more likely to think the effects will be too far in the future to worry them (28% agree and 52% disagree), compared to the 'AB' group where 14% agree and 76% disagree, as are those from a household with a 'bad' financial situation (15% agree and 71% disagree) compared to a 'good' household (23% agree and 62% disagree).

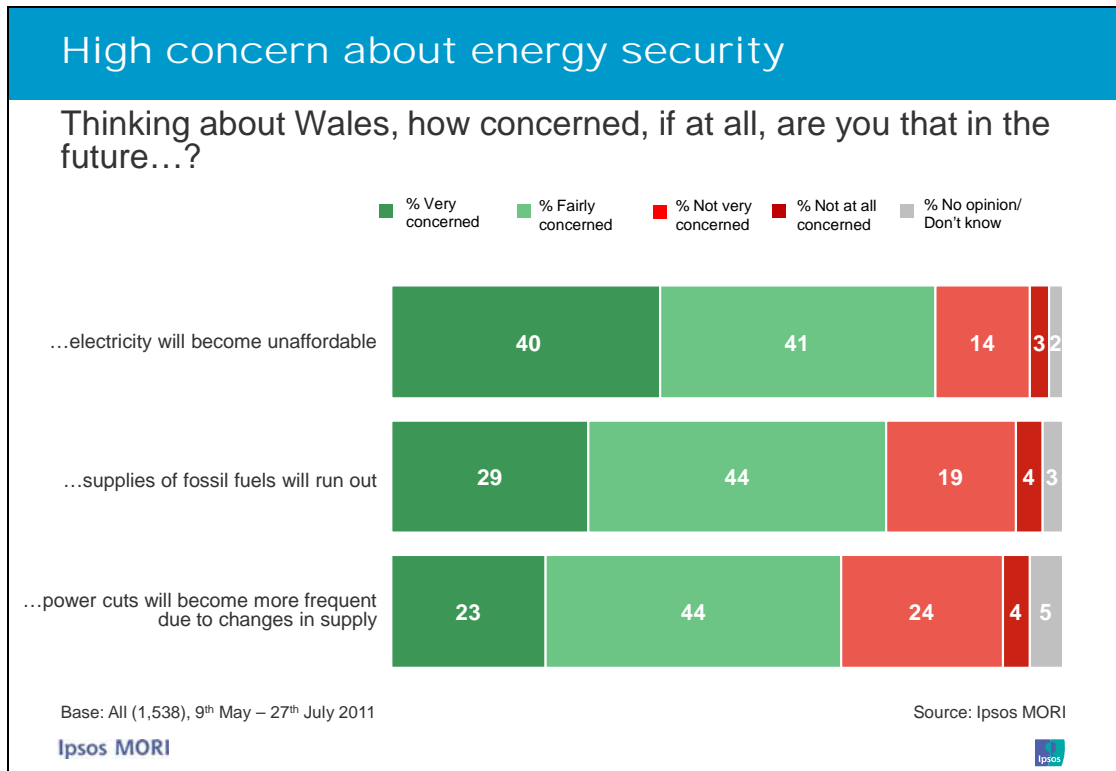
Older adults think the effects of climate change are exaggerated; among those aged 75+, 41% agree vs. 28% of those aged 16-34, although those aged 35-54 are most likely to disagree (57% vs. 49% overall). Those from the 'AB' social group also disagree (58% vs. 44% 'DE').

Those aged 75+ also think that their local area is less likely to be affected with 30% disagreeing with this statement vs. 20% of those aged 16-34 and 18% of those aged 35-54. Men are also more likely to disagree (27% vs. 17% women).

There are strong concerns over energy security in Wales, although there is more concern over electricity becoming unaffordable than there is about supplies of fossil fuels actually running out. Very few are not concerned about these issues at all.

When we compare these results to the Cardiff University study in 2010, it appears that concern about energy security has fallen dramatically. 52% were 'very concerned' that electricity would become unaffordable (compared to 40% now), 47% were 'very concerned' that supplies of fossil fuels would run out (compared to 29% now) and 37% were 'very concerned' that power cuts would become more frequent (compared to 23% now). One possible explanation for this fall could be that the fieldwork for the 2011 study was carried out during the summer and in 2010 was carried out during a particularly cold spell in the winter and concern about energy security would seem more important during this time.

Figure 21 – High concern about energy security



Below, we present the results for the 'net concern' of each group; the percent 'concerned' minus the percent 'not concerned'. This figure gives the amount by which concern outweighs non-concern.

Women are more concerned about all three energy security measures; that electricity will become unaffordable (74% net concern vs. 53% among men), that supplies of fossil fuels will run out (55% net concern vs. 45% men) and that power cuts will become more frequent (44% net concern vs. 34% men).

Those in less well off households are also more concerned about electricity becoming unaffordable (78% net concern from a household in a 'bad' financial position vs. 58% in a 'good' position) and that fossil fuel supplies will run out (61% net vs. 46%).

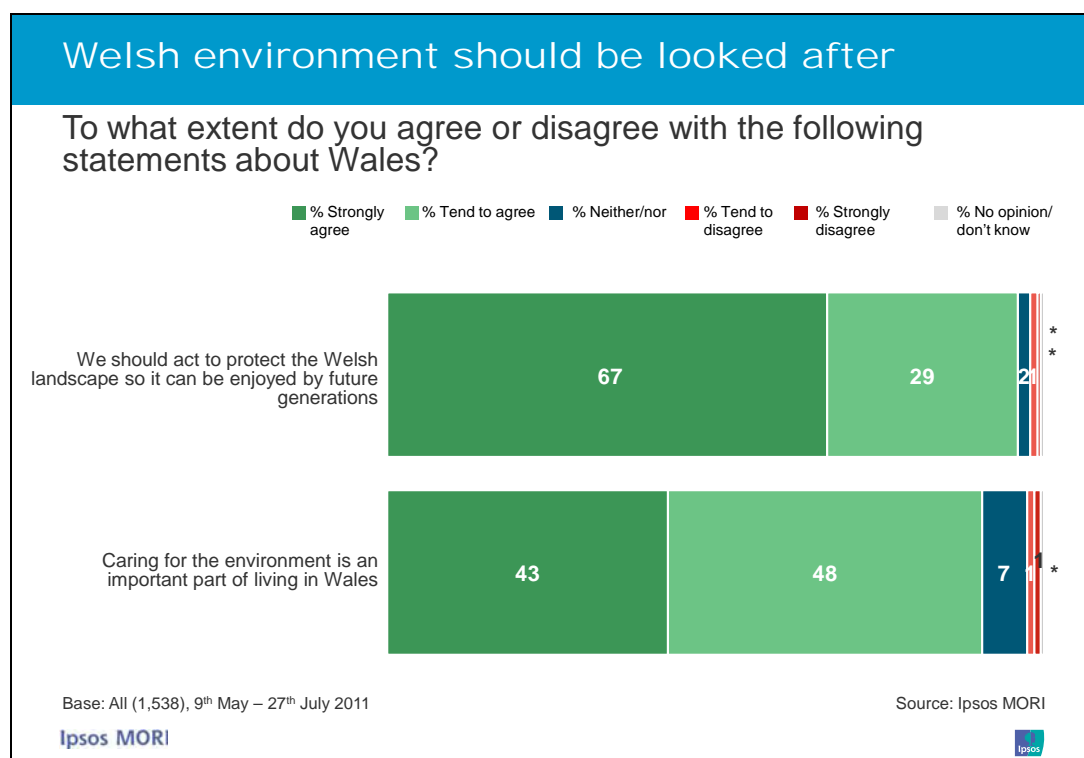
There is specific concern about fossil fuels running out among those aged 35-54 (58% net concern vs. 50% overall) and a specific lack of concern among those classified among the 'DE' social grade (43% net).

Those in the highest social grades 'AB' are most concerned about power cuts (45% net concern vs. 39% overall) as are those living in a rural area; 45% net concern in a rural area vs. 38% in an urban area and 30% in a remote area.

## Key environmental attitudes

Two-thirds 'strongly agree' that we should act to protect the Welsh landscape, with a further three in ten tending to agree. This would be a difficult statement to disagree with but it does show that the majority strongly agree that this should be the case. Again, very few disagree that caring for the environment is an important part of living in Wales but the strength of opinion is such that 43% 'strongly agree' that it is an important part.

Figure 22 – Welsh environment should be looked after



Caring for the environment is more important for those living in a remote or rural area (94% agree) than it is for those in an urban area (90%). It is also more important for those in a 'good' financial situation (94%) than those in a 'bad' situation (85%).

Nearly everyone agrees that we should act to protect the Welsh landscape and no particular groups are more likely to say that they disagree.

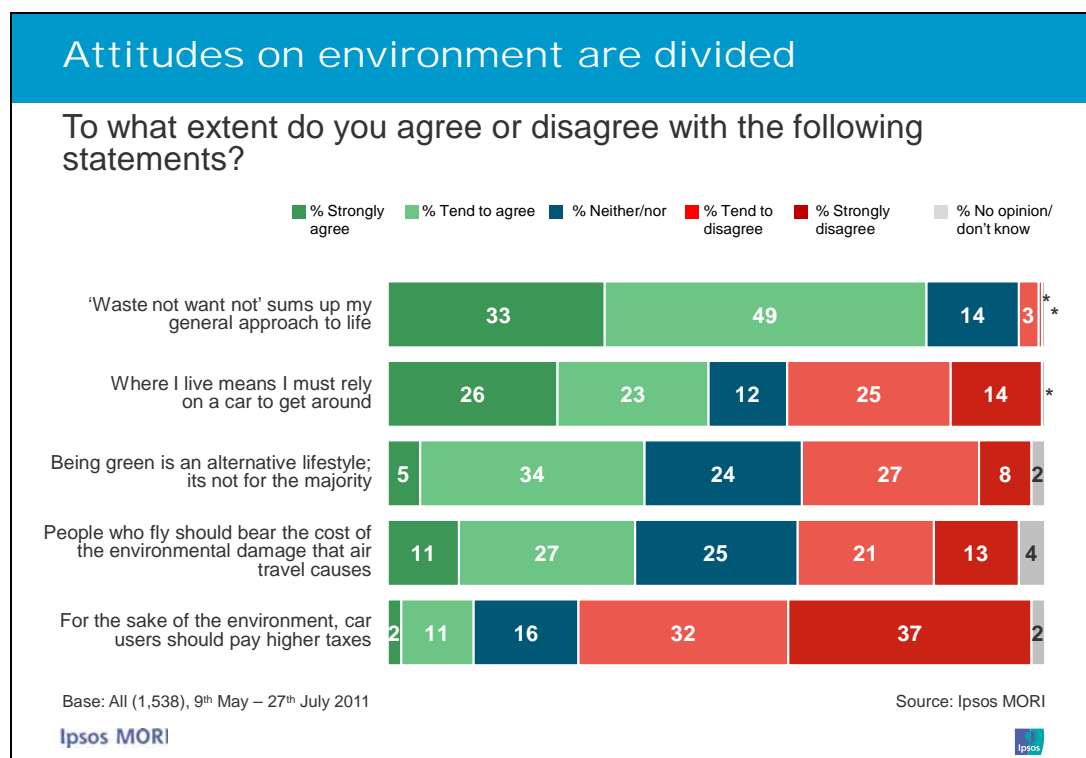
Overall, attitudes around the environment show a dislike of waste. However, the public are split on whether green lifestyles are mainstream, with many expressing a reliance on cars and resistance to the idea that the polluter pays.

Most people would say that the phrase 'waste not want not' sums up their general approach to life (82% agree) but more people think that 'being green is an alternative lifestyle' than disagree (39% agree vs. 35% who disagree).

Half agree that they need a car to get around because of the place where they live and, as such, seven in ten do not think that car users should pay higher taxes for the sake of the environment. There is less strength of feeling for airline passengers but one third do not think that people who fly should bear the cost of the damage that air travel causes.

People who live in Wales in 2011 are more likely than those living in England in 2009 to think that 'waste not, want not' is an expression which sums up their general approach to life. A third in Wales 'strongly agree' (33%) and half 'tend to agree' (49%), compared to 30% and 40% in England respectively (Defra 2009 study). Those in Wales are more reluctant to see car users paying higher taxes for the sake of the environment (37% 'strongly disagree' in Wales compared to 28% in England) and those in England are less likely to see being green as an alternative lifestyle (21% 'strongly disagree' compared to 8% in Wales).

Figure 23 – Attitudes on the environment are divided



Those from the 'DE' social grade classification are less likely to feel that being green is mainstream; only 24% disagree that it is an alternative lifestyle compared to 55% of ABs. Those aged 35-54 are also more likely to disagree.

Three-quarters of those living in a rural area disagree that car users should pay higher taxes compared to two-thirds living in an urban area (66%).

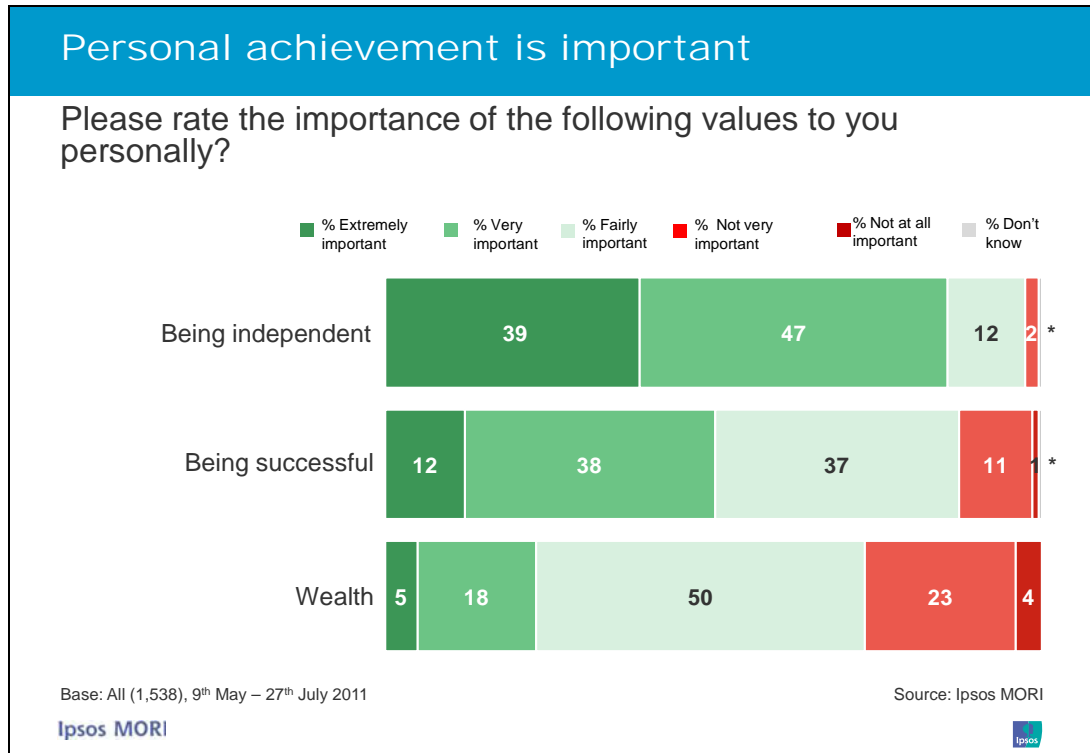


# Economic sustainability

## Economic values

The underlying economic values show that people place great importance on being independent and, to a lesser degree, to being successful. Wealth is not quite so important but the majority still agree that it is at least fairly important.

Figure 24 – Personal achievement is important



Women feel that it is more important for them to be independent, with 89% rating this as either extremely or very important (vs. 84% of men) but place less value on wealth than men.

Younger adults aged 16-34 are most likely to think that wealth is important (29% think it is either extremely or very important) but the lowest importance is found among those aged 35-54 (19%). Those in the lower social grades think that wealth is not important, as do those who feel that they are in a 'bad' financial situation.

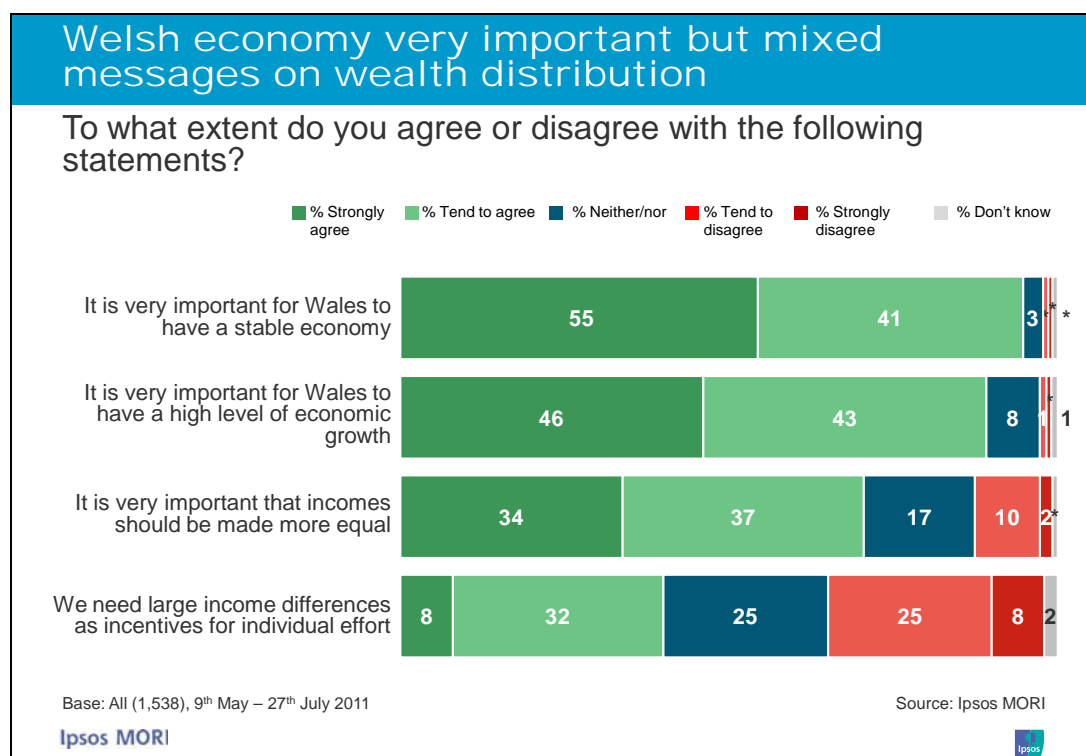
Being successful is seen as more important among young adults, with 67% of those aged 16-34 thinking it is either extremely or very important, falling to 41% among those aged 75+, as well as among those who fall into the 'AB' social grade (59% vs. 41% in the 'DE' classification) and those who feel that they are in a 'good' financial situation (56% vs. 46% 'bad').

## Key economic beliefs

There are high expectations for the economy in Wales, with nearly everyone agreeing that it is very important for Wales to have a stable economy and that Wales should have a high level of economic growth.

Opinion appears to be divided and slightly contradictory on wealth distribution. There is overall agreement that it is important for incomes to be made more equal but more agree than disagree that we need large income differences as incentives for individual effort.

*Figure 25 – Welsh economy is very important but mixed messages on wealth of distribution*



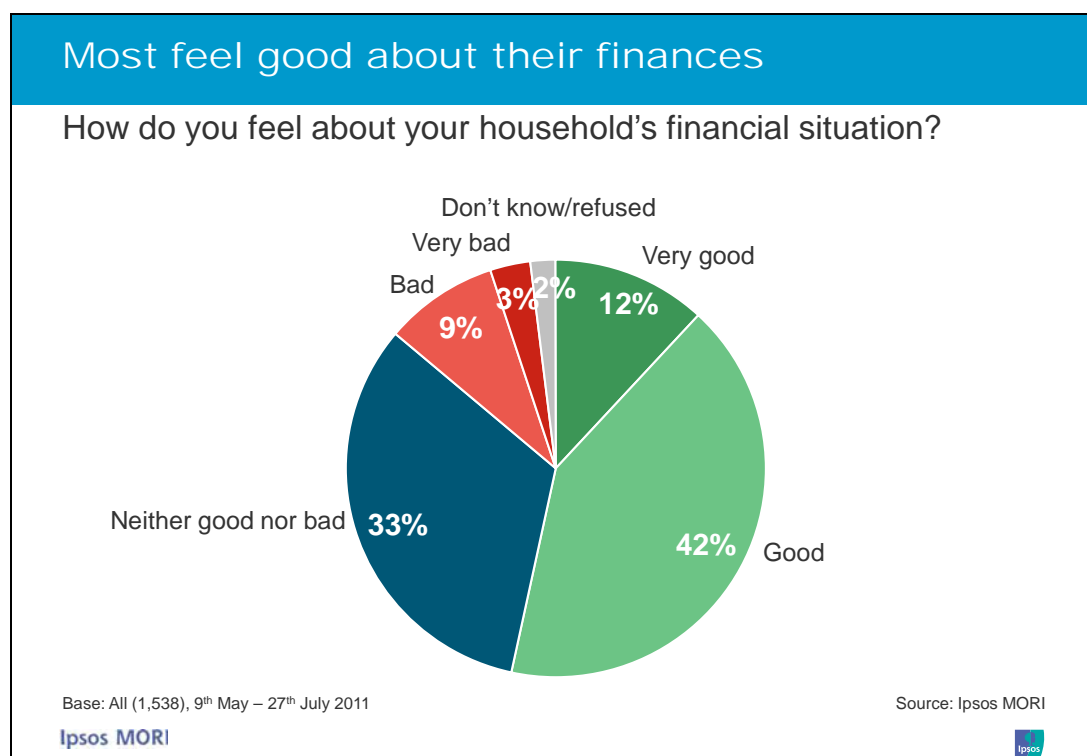
Beliefs about the economy are similar across the sub-groups considered. Men are slightly more likely to disagree that incomes should be made more equal (14% vs. 9% of women). In contrast, those from the lower social grades 'DE' are more likely to agree that this should be the case (78% agree), as are those who have a 'bad' financial situation (80% agree).

## Key economic attitudes

Despite the ongoing recession, those who feel 'good' about their financial situation still outnumber those who feel 'bad' by over four to one. In fact, the same amount feel 'very good' as feel 'bad' (12%).

Although the wording in the Defra 2009 study was slightly different to that used in this survey, those living in Wales in 2011 paint a better picture of their household's financial situation than those living in England in 2009, with 12% describing it as 'very good' and 42% as 'good' compared to 5% and 34% in England.

Figure 26 – Most feel good about their finances



Older adults (aged 75+) are happier with their household's financial situation, with seven out of ten describing it as 'good' and only 1% as 'bad'. This compares to just under half of those aged 16-34 who would describe their situation as 'good' (47%) and 13% who would describe it as 'bad'.

As we might expect, those in the higher social grades are also happier with their situation, with 73% 'good' and 3% 'bad' in the 'AB' group, compared to 38% 'good' and 19% 'bad' in the 'DE' group.

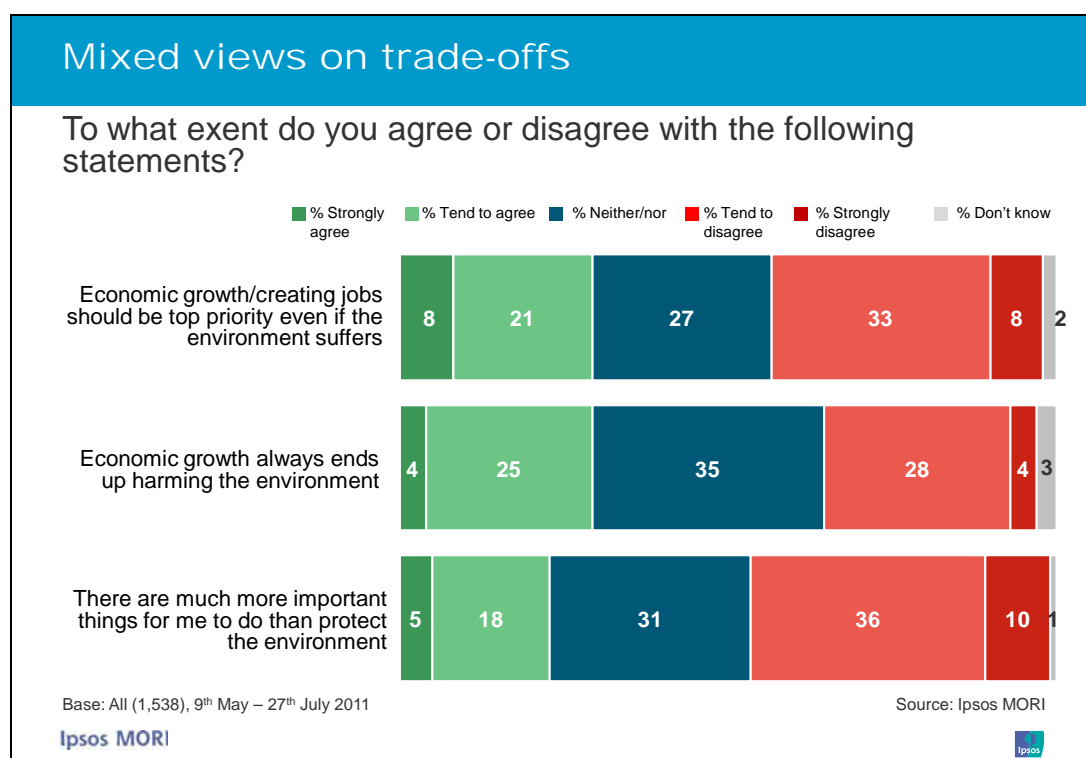
## Trade-offs

Three trade-off questions were put to respondents to force them to choose between two ends of a scale. Usefully for the accompanying segmentation to this survey, opinions were almost equally split on all three measures.

Just under one third agree that economic growth should be the top priority even if the environment suffers, with four in ten disagreeing, while almost a quarter think that there are much more important things for them to do than protect the environment (although almost half disagree).

Views were also split almost equally when asked whether economic growth always ends up harming the environment.

Figure 27 – Mixed views on trade-offs



Women have more time than men to help protect the environment; while half disagree that there are much more important things for them to do (50% vs. 42% of men).

Those aged 35-54 are the least likely to think that economic growth should be the top priority, with almost half (49%) disagreeing with this statement. Those aged 55-74 are the least likely to think that they have much better things to do than to protect the environment.

Those from the lower social grades would prefer economic growth to be the top priority, with 40% agreeing and 28% disagreeing within the 'DE' classification compared to 18% agreeing and 57% disagreeing from within the 'AB' classification. Those in higher social grades are less likely to think that they have much better things to do than protect the environment (56% disagree within 'AB' group vs. 39% within the 'DE' classification).

Those in urban areas are more likely to think economic growth should be the top priority than those in rural or remote areas, although there are still more people who disagree (37%) than agree (32%).

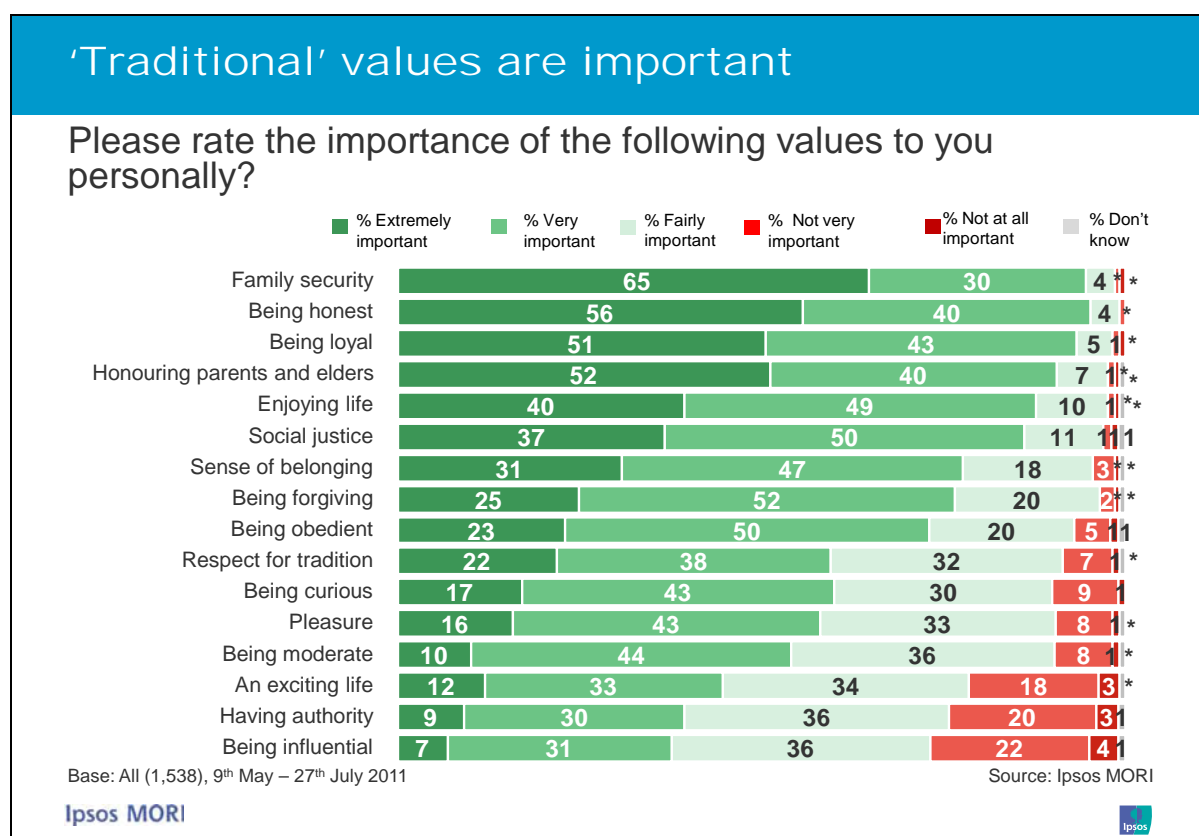
There is a clear contrast between the different range of social grades when it comes to thinking whether economic growth always ends up harming the environment; those from the 'AB' classification are more likely to disagree (47% vs. 22% who agree) and those in the 'DE' classification are more likely to agree (40% vs. 19% who disagree). Other groups who are more likely to disagree with this statement are men, those aged 35-54 and those who would describe their household's financial situation as 'good'.

# Social sustainability

## Social / wider values

Of all the underlying values which we have measured, family security is seen as being the most important, closely followed by being honest and loyal. Having authority and being influential are among the lowest, although wealth is lower but is not shown on this chart (see Economic values).

Figure 28 – ‘Traditional’ values are important



Women place slightly more importance on average on all of these measures, scoring an average of 72% either ‘extremely’ or ‘very important’ compared to 70% among men. Women are more likely to feel that a ‘sense of belonging’ is important (16 percentage points more than men), as well as ‘Being forgiving’ (8pp), ‘Respect for tradition’ (7pp), ‘Honouring parents and elders’ and ‘Being loyal’ (both 6pp). Men were more likely than women to choose ‘An exciting life’ (7pp), ‘Pleasure’ (6pp) and ‘Being influential’ (5pp).

Those in the youngest age group are more likely than the oldest group to mention ‘An exciting life’ (34pp) and ‘Pleasure’ (21pp), as well as ‘Being influential’ (16pp), ‘Having authority’ (13pp), ‘Enjoying life’ (9pp) and ‘Being curious’ (8pp). Those aged 75+ are more likely than those aged 16-34 to mention ‘Respect for tradition’ (28pp), ‘Being moderate’ (23pp), ‘Sense of belonging’ (12pp), ‘Being obedient’ (8pp), ‘Being forgiving’ and ‘Social justice’ (both 5pp).

Those within the 'DE' social grade classification were no more likely to say any of these values were important, scoring an average of 68% compared to 75% among those in the 'AB' classification. Those in the 'AB' classification were more likely than those in the 'DE' classification to mention 'Being curious' (26pp), 'Social justice' (14pp), 'Being forgiving' (13pp), 'An exciting life' (12pp), 'Enjoying life' and 'Being influential' (both 10pp) and 'Having authority' (7pp).

Those living in a remote area have different values to those in urban areas. For example, those in a remote area are more likely to mention 'Being curious' (15pp more than urban) 'An exciting life' (10pp more than urban – but 12pp more than rural), 'Pleasure' (8pp more than urban) and 'Enjoying life' (5pp more than urban). Those in urban areas were more likely to mention 'Sense of belonging' and 'Being moderate' (both 5pp more than remote).

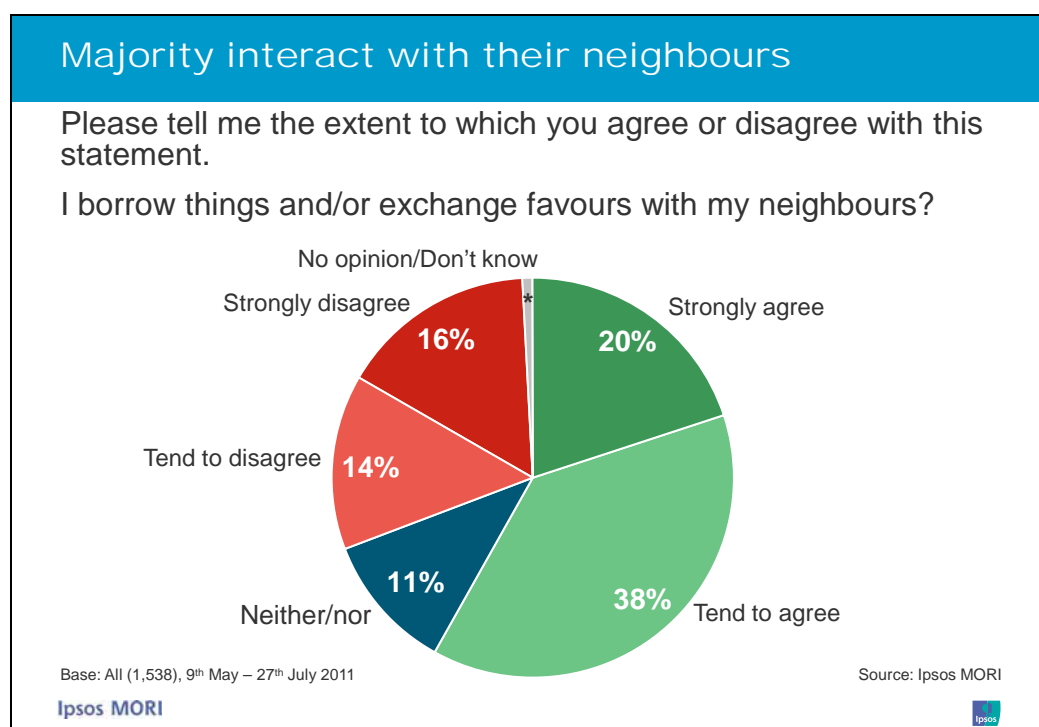
Again, those who report their household's financial situation as 'bad' are not any more likely to mention any of these values than those who say it is 'good', averaging 66% saying 'extremely' or 'very important' compared to 73%. Those who say it is 'good' are more likely to mention 'Enjoying life' (14pp), 'Sense of belonging' (13pp), 'Having authority' (11pp), 'Being moderate' (10pp), 'Being influential' and 'Being forgiving' (both 9pp), 'Honouring parents and elders' (8pp), 'Being obedient' and 'Being loyal' (both 7pp), 'Being curious' (6pp), 'An exciting life', 'Social justice', 'Family security' and 'Being honest' (all 5pp).

## Reported social behaviours

There is a reasonably strong community link in Wales but, while six out of ten borrow things and/or exchange favours with their neighbours, half as many (30%) do not.

The 'Living in Wales' study in 2008<sup>4</sup> found a similar proportion who agreed that they borrowed things or exchanged favours with their neighbours but the strength of feeling was more prominent in 2008 than 2011 (20% strongly agreed with this statement in 2011 compared to 33% in 2008).

Figure 29 – Majority interact with their neighbours



Those aged 35-54 are the most likely to borrow things and exchange favours with their neighbours (65% agree compared to those aged 75+ where 48% agree), as are those who live in a rural area (67% agree compared to those who live in an urban area where 54% agree).

<sup>4</sup> Welsh Assembly Government – Living in Wales survey (2008). Base = 7,694 adults aged 18+  
Welsh Government – Sustainability Survey

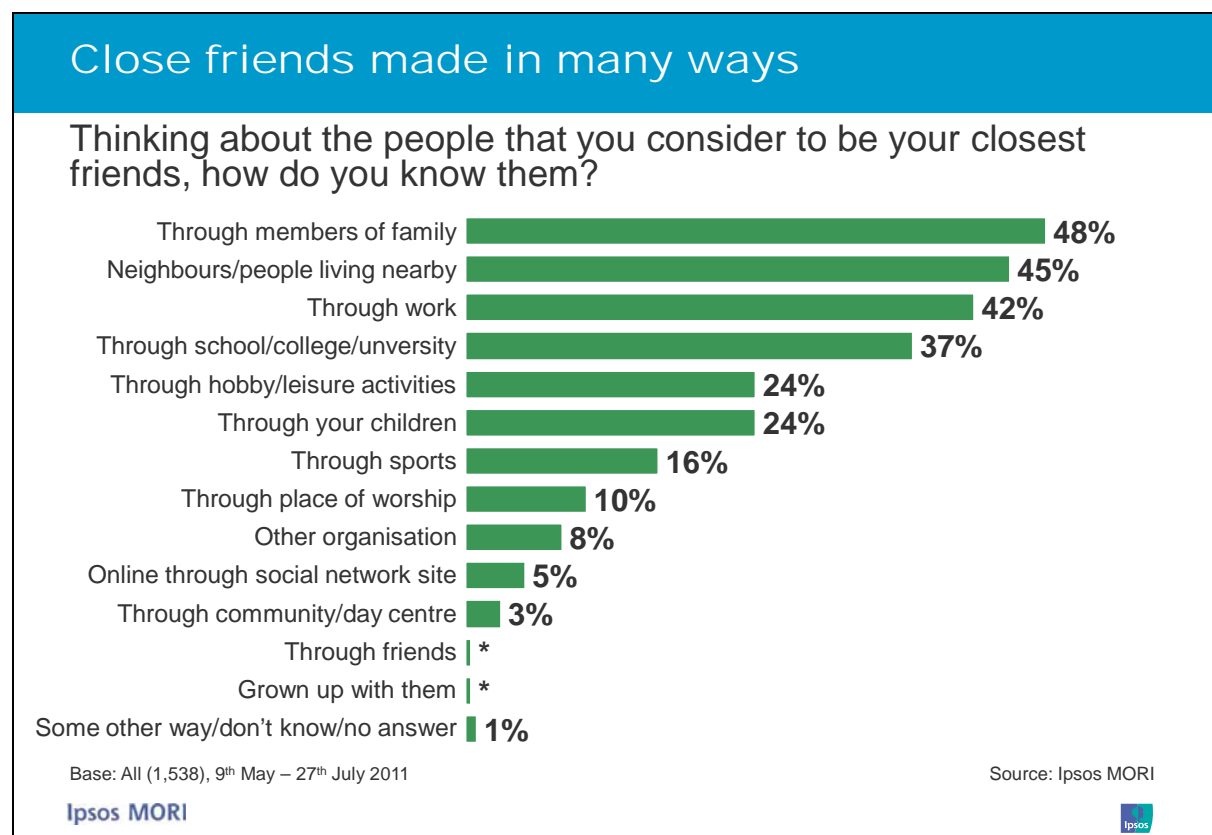


There are many different ways in which people make their 'closest friends'. Through members of the family, through neighbours and through work are the most common.

Growing up with someone is mentioned by less than half a percent, however, through places like schools and universities and even through neighbours/people living nearby are likely to include those who they have grown up with.

In a show of the increasing importance of social media, one in twenty people now claim to have met their closest friends through a social network site.

*Figure 30 – Close friends made in many ways*



Close friends are made in different ways by different people and women are more likely to make their closest friends through members of their family or through their children, while men are more likely to make their closest friends through a hobby or leisure activity or through sports.

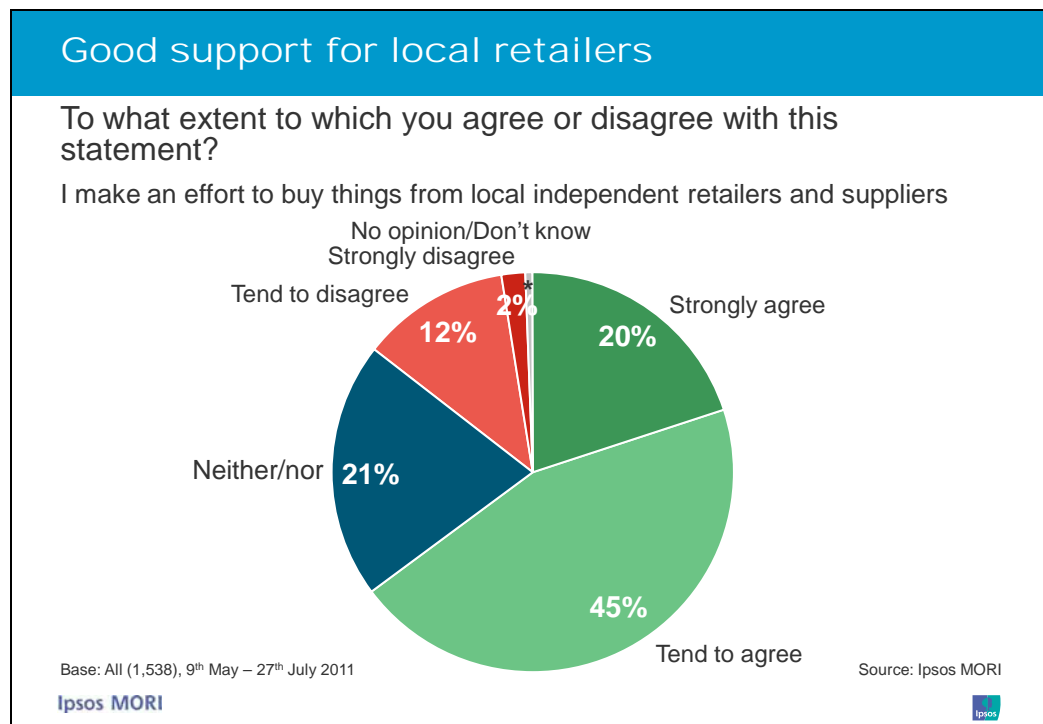
Similarly, older people are more likely to make their closest friends through a place of worship, a community or day centre, another organisation such as a residents' association or from being their neighbour. Younger people are more likely to have made them through work, through school, university or college, through sports or online through social networking sites (10% of those aged 16-34 say this).

Those in lower social groups make their closest friends through members of their family and their neighbours while those in higher groups favour work or school, college or university.

People in Wales are likely to make an effort to buy local products, with the majority agreeing that they do this.

The Defra 2009 study found that those living in England were more likely to make this effort than those living in Wales in 2011 with 20% in Wales strongly agreeing compared to 26% in England, and 45% tending to agree compared to 47% in England.

*Figure 31 – Good support for local retailers*



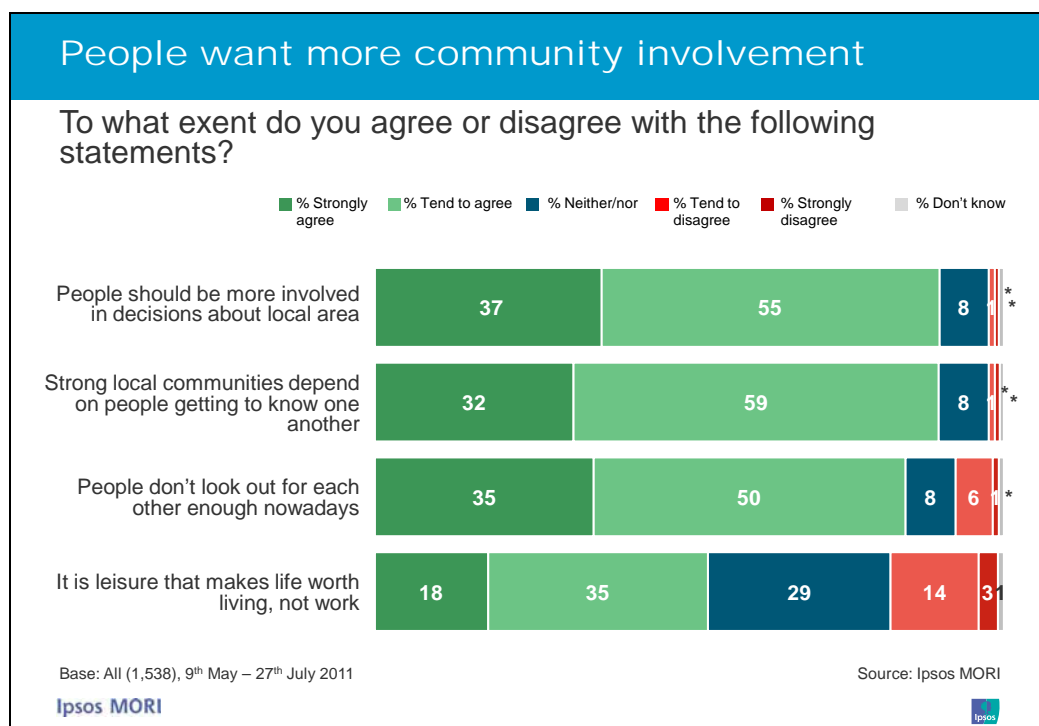
Women make more effort to do so than men, with seven out of ten agreeing (compared to six in ten men) as do older people (77% aged 75+ agree vs. 54% aged 16-34). Those in the 'AB' social grading are more likely, as are those in rural or remote areas.

## Key social beliefs

Only just over a half of the adult Welsh population agree with the statement that 'it is leisure that makes life living, not work' (53%) with 17% disagreeing (3% strongly).

There is a general belief that people should be more involved, whether it be in decisions about their local area, making strong communities by getting to know each other or simply by looking out for each other more.

Figure 32 – People want more community involvement



Those aged 55-74 are most likely to feel that people should be more involved in decisions about their local area (94%), as are those from the 'AB' and 'C2' social grades. Those aged 55-74 also feel that people don't look out for each other enough nowadays (90%) along with those from the 'DE' social classification (89%).

'Strong local communities depend on people getting to know one another' is a more common thought among those living in a remote area (94% agree) or a rural area (93%) than an urban area (89%) and is also more common among those who feel their financial situation is 'good' (92%) than 'bad' (83%).

Men are more inclined to agree that it is leisure that makes life living, not work (56% agree compared to 50% of women), as are younger adults (62% of those aged 16-34 agree compared to 40% of those aged 75+).

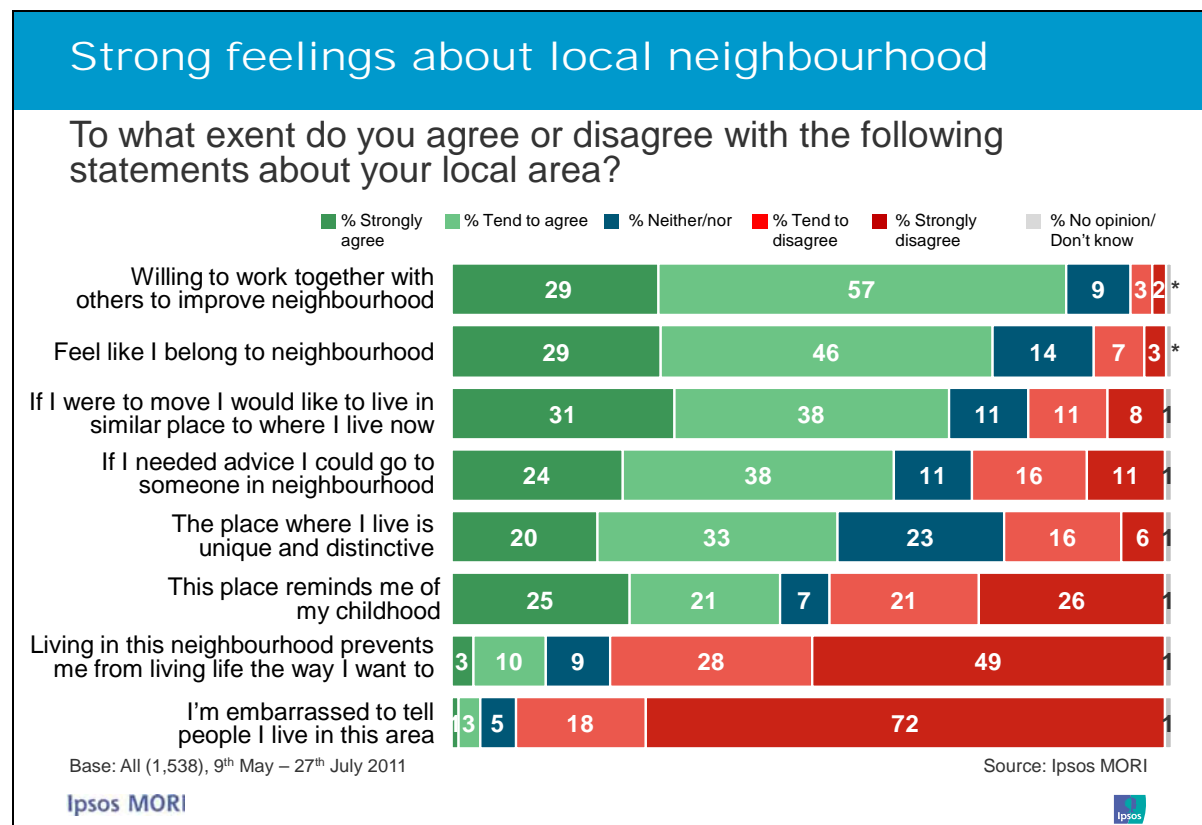
## Key social attitudes

People have strong feelings about their local area and the vast majority feel like they belong there and are also willing to work together to improve the neighbourhood. Most think that the place they live is unique and distinctive and would move to a similar place if they ever did move.

Very few people are embarrassed to tell others that they live where they do, while just over one in ten feel that their neighbourhood holds them back from living how they want to.

When we compare these results to those found in the Cardiff University study in 2010, we find that those living in Wales have more affinity with their local neighbourhood, with 25% strongly agreeing that 'this place reminds me of my childhood', compared to 18% in Great Britain as a whole in the 2010 survey.

Figure 33 – Strong feelings about local neighbourhood



Women are more likely to feel able to go to someone in their neighbourhood if they needed advice (69% agree vs. 55% of men), as are those who are aged 55+ (66% agree vs. 58% of those aged 16-34). Those living in a rural area are more likely to agree (71% vs. 58% urban), as are those who would describe their financial situation as 'good' (65% vs. 54% 'bad').

Younger adults would be more willing to work with others to improve their neighbourhood; 87% of those aged 16-34 agree and 90% of those aged 35-54, compared to 74% of those aged 75+. Those from a higher social classification are also more likely to agree (94% 'AB' vs. 80% 'DE'), as are those who live in a remote area (93% vs. 84% urban).

Those living in a remote area are more likely to think that the area in which they live is unique and distinctive (75% vs. 46% urban), as are those who feel more comfortable about their financial situation (59% among those who describe their finances as 'good' vs. 44% 'bad').

While very few are embarrassed to tell people that they live in the area they do, a small proportion of those aged 16-34 do say this (6% agree while 86% disagree), while 97% of those aged 75+ disagree. As we might expect, those who regard their financial situation as 'good' are more likely to disagree (93% vs. 85% 'bad') as are those who live in a remote area (97% vs. 89% urban).

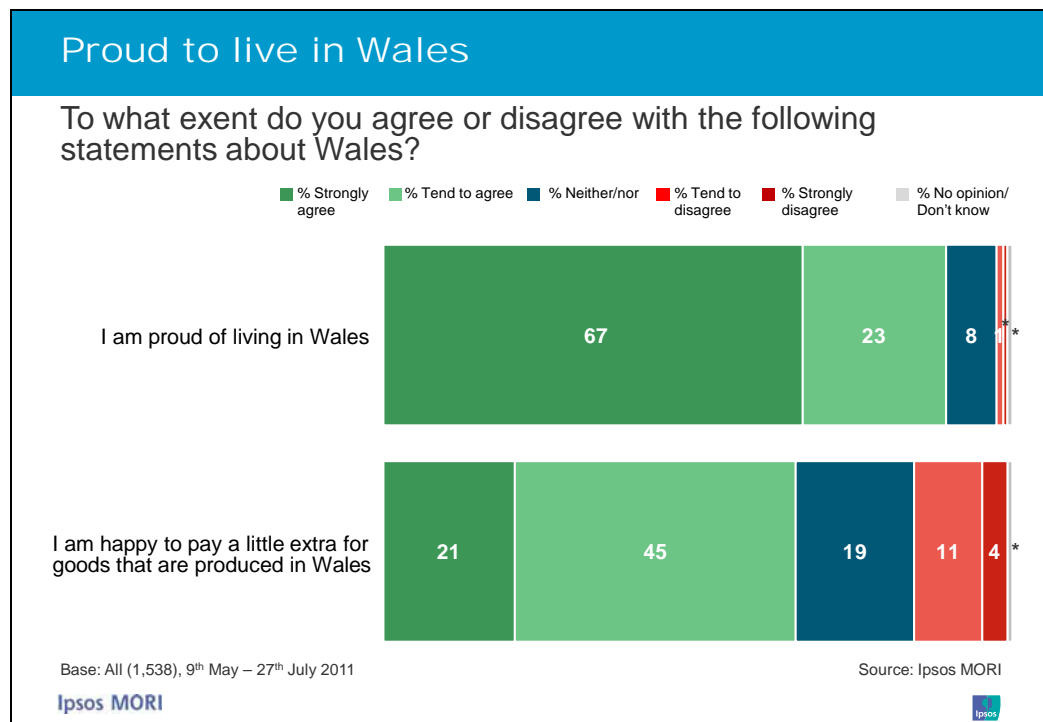
The older age groups feel like they belong to their neighbourhood; 84% aged 75+ and 85% aged 55-74 agree compared to 62% of those aged 16-34. Those who feel that their financial situation is 'good' feel more like they belong to their neighbourhood (80% agree and 7% disagree) than those who feel it is 'bad' (where 61% agree and 20% disagree). Those who live in a rural area are more likely to agree than those in an urban area (79% vs. 73%).

Older residents are more likely to favour a move to somewhere similar if they did move; 75% of those aged 75+ agree compared to 59% of those aged 16-34. Among those aged 16-34, 28% disagree. Those living in a remote area are more likely to agree (81%) than those in an urban area (65%) as are those with a 'good' financial situation (75%) compared to those with a 'bad' situation.

Living in their neighbourhood prevents almost one in five young adults aged 16-34 from living their life the way they want to (19%) but this level of agreement reduces with age; 89% of those aged 75+ disagree with this statement. Amongst those with a 'DE' classification, almost one in five (18%) agree compared to those with an 'AB' classification (9%) and almost one in four agree amongst those who feel that their financial situation is 'bad' (24%) compared to 10% who feel it is 'good'. Those living in a rural area are most likely to disagree (82%) followed by urban (76%) and remote (73%).

Two-thirds of adults strongly agree that they are proud of living in Wales and very few people actually disagree and are not proud. Almost two-thirds are happy to pay extra for goods produced in Wales, although 15% are not.

Figure 34 – Proud to live in Wales

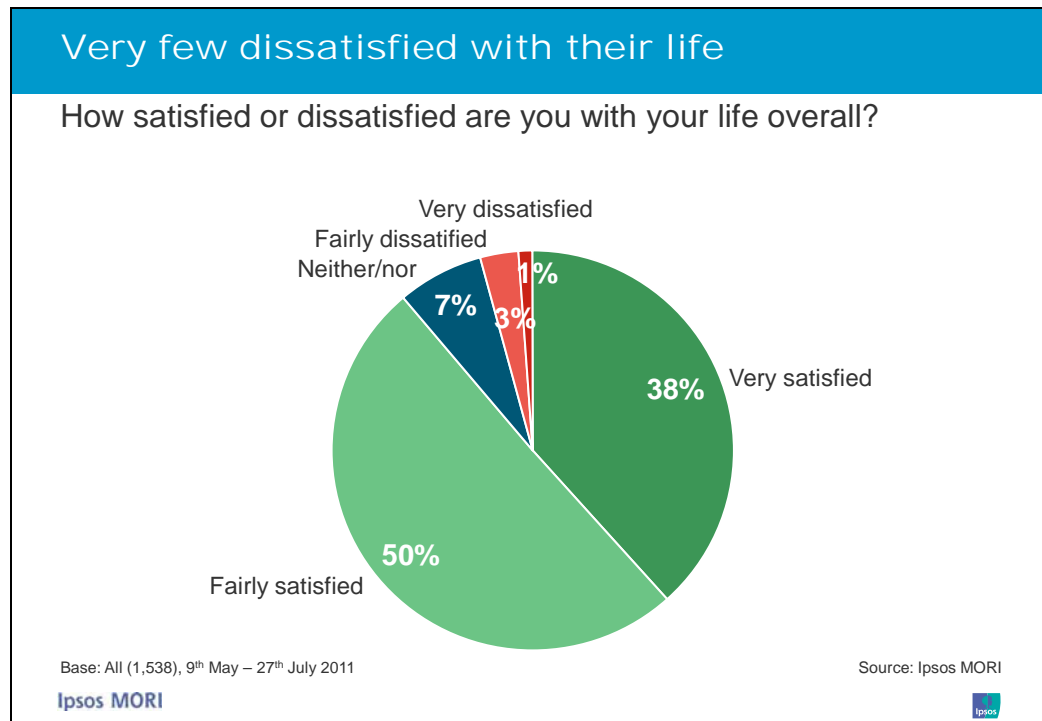


Women are more proud of living in Wales than men, with 94% agreeing and 71% strongly agreeing with this statement (compared to 87% and 63% of men respectively). There is very little difference in pride between the different age groups, social grades, level of rurality and household's financial situation.

In terms of who would be happy to pay a little extra for goods produced in Wales, those who would describe their household's financial situation as 'good' would be more likely (70% agree vs. 12% who disagree) compared to those who would describe it as 'bad' (57% agree vs. 22% who disagree). Those living in a remote area are also more likely to agree than those in urban areas (73% vs. 63%), as are those from the 'AB' social grade rather than the 'DE' grade (77% vs. 59%).

Overall, 88% are satisfied with their life, with almost four in ten claiming to be 'very satisfied'. Only 4% are dissatisfied, although this would mean that one in every twenty-five adults in Wales are dissatisfied if we extrapolate to the population as a whole.

*Figure 35 – Very few dissatisfied with their life*

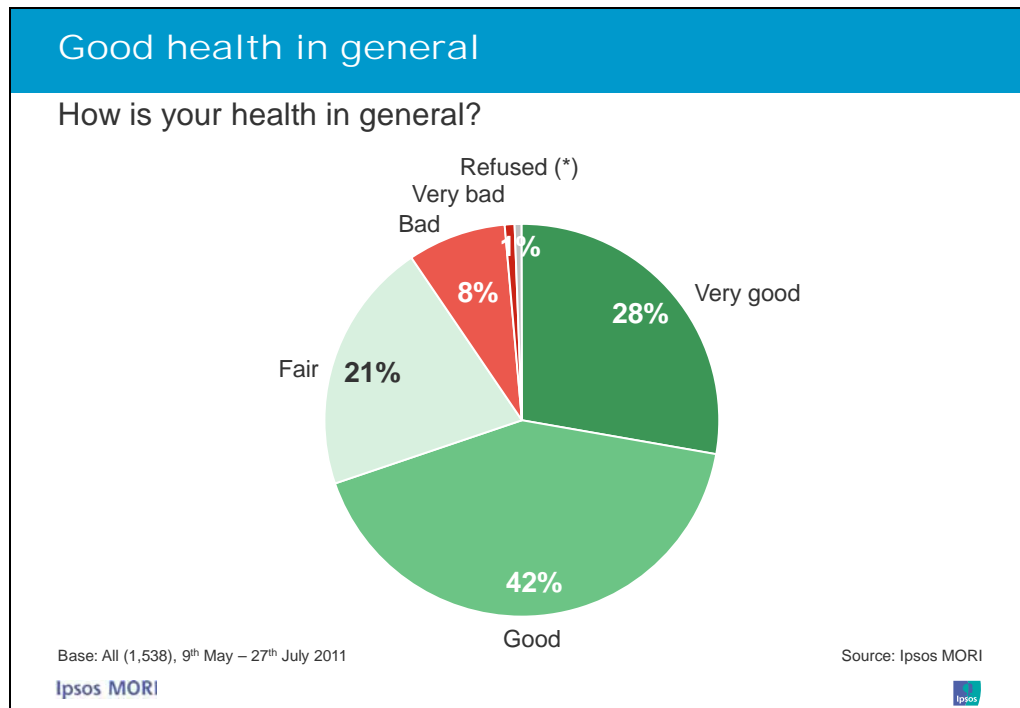


Young people are less satisfied with their life overall, with 88% of those aged 16-34 satisfied, compared to 97% of those aged 75+. Those in the higher social grades are also happier, with 95% of those in the 'AB' classification satisfied compared to 82% in the 'DE' classification. This difference is even more prevalent in the way households describe their financial situation, 97% of those who describe their situation as 'good' are satisfied, compared to 57% who would describe it as 'bad'.

The area in which you live can have an effect on overall satisfaction, with 94% in a remote area satisfied falling to 86% in an urban area.

Whilst the majority of adults in Wales would describe themselves as being in 'good' health, just over a quarter are willing to go as far as describing themselves as in 'very good' health'. Almost one in ten (9%) consider themselves to be in 'bad' health.

*Figure 36 – Good health in general*



It is not surprising that older people in Wales are less optimistic about their health; among those aged 75+, just over half (53%) would describe their health as 'good', while almost one in five (18%) would describe it as 'bad'. Among the younger adults, 88% would describe it as 'good' and only 3% as 'bad'. A very similar pattern is clear among the different social grades, with 18% in the 'DE' classification thinking that their health is 'bad' (vs. 3% in the 'AB' group) and 58% thinking it is 'good' (vs. 83% in the 'AB' group).

Having money can have a positive effect on the way in which adults in Wales would describe their health; 21% who would describe their financial situation as 'bad' would also describe their health as 'bad', while 77% describe both their financial situation and health as 'good'.

Those living in a remote area would also describe their health as being better, with 79% saying their health is 'good' compared to 69% living in an urban area.



# Appendices

Appendix A – Sample Profile

Appendix B – Statistical Reliability

Appendix C – Further Details

## Appendix A – Sample profile

Sample profile	
	%
<b>Gender</b>	
Male	48.3
Female	51.7
<b>Age</b>	
16-17	3.4
18-24	11.8
25-34	13.7
35-44	16.0
45-54	16.8
55-59	6.9
60-64	8.9
65-74	13.6
75+	8.8
<b>Working status</b>	
Working full-time	42.8
Working part-time	9.3
Not working	47.6
Other	0.3
<b>Socio-economic grade</b>	
A	3.1
B	17.8
C1	28.3
C2	20.1
D	17.1
E	13.7

Source: Ipsos MORI

Table ii – Sample Profile

## Appendix B – Statistical reliability

The sample tolerances that apply to the percentage results in this report are given in the table below. This table shows the possible variation that might be anticipated because a sample, rather than the entire population, was interviewed. As indicated, sampling tolerances vary with the size of the sample and the size of the percentage results.

95% Confidence Intervals			
	10% or 90%	30% or 70%	50%
<i>Approximate size of Sample on Which Survey Results are Based</i>	±	±	±
Adults living in Wales (1,538)	1.5	2.3	2.5
Female adults living in Wales (745)	2.2	3.3	3.6
Adults aged 75+ living in Wales (166)	4.6	7.0	7.6
Adults living in Wales who think 'there is no such thing' as climate change (26)	11.8	18.0	19.6

Source: Ipsos MORI

Table iii – Confidence intervals for population and sample tolerances

Tolerances are also involved in the comparison of results from different parts of the sample, or of results from this survey and another survey. A difference, in other words, must be of at least a certain size to be considered statistically significant. The following table is a guide to the sampling tolerances applicable to comparisons.

95% Confidence Intervals			
	10% or 90%	30% or 70%	50%
<i>Sample sizes being compared (sub-groups or trends)</i>	±	±	±
1,000 on 1,000	2.6	4.0	4.4
500 on 500	3.7	5.7	6.2

150 on 150	6.8	10.4	11.4
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*Source: Ipsos MORI*

*Table iv – Confidence intervals for multi-comparables in sampling tolerances*

## Appendix C – Questionnaire

We are very interested to see how our questions work in further survey's and learn from other people's experiences.

If you would like a copy of the questionnaire used for this research, please contact us with your name, organisation and include a few lines about how you plan to use the questionnaire:

**Land, Nature and Forestry Division**

Welsh Government

Rhodfa Padarn

Aberystwyth

Ceredigion

SY23 3UR

Tel: 0300 062 2301

Email: [environmentalevidence@wales.gsi.gov.uk](mailto:environmentalevidence@wales.gsi.gov.uk)