

## National Survey for Wales: Headline results, April 2014 – March 2015 (Revised)

**Following publication of this release on 11 June 2015, an error was identified in the method used to define material deprivation. This meant that more people were classed as being deprived than should have been, but the overall messages about material deprivation have not changed. The percentages quoted in the material deprivation chapter including Chart 30 were corrected, and the release re-published on 14 Sep 2015.**

The National Survey for Wales is a face-to-face survey of people across Wales. Each year over 14,000 people aged 16 and over were asked for their opinions on a wide range of issues affecting them and their local area. Respondents are selected at random to ensure the results are representative.

This release presents key results from the third full year of fieldwork (April 2014 to March 2015). A number of questions asked in 2014-15 were also included in the survey in 2012-13 and 2013-14. For each result discussed in the text of this release, if there has been a significant difference between any previous year and 2014-15 then this is noted. For 2014-15 there were a number of new topics. A table indicating which questions were new and which were included in previous years can be found in the [Key Quality Information](#). Where appropriate, results are also compared with those from other surveys. Tables containing confidence intervals and more detailed results will be available on the [StatsWales](#) website shortly after this release is published.

More information about the survey methodology, potential uses of the results, and definitions of terms used can be found in the [Key Quality Information](#) section of this document. Background information about the survey, including the full questionnaire and analysis of the results from previous years, is available on the [National Survey web pages](#).

### Key findings

#### Overall satisfaction with [health](#), [education](#), and the [Welsh Government](#)

- People were asked to rate health services and the education system on a scale of 0 (extremely bad) to 10 (extremely good). The average ratings given for health and education were 6.3 out of 10 for health and 6.6 for education, in line with the results from 2013-14.
- People were asked to rate their satisfaction with how the Welsh Government is doing its job, from 0 (extremely dissatisfied) to 10 (extremely satisfied). The average rating was 5.6. This is not significantly different from 2012-13 and 2013-14.

**Statistician:** Lisa Walters    **Tel:** 029 2082 6685    **E-mail:** [surveys@wales.gsi.gov.uk](mailto:surveys@wales.gsi.gov.uk)

**Next update:** June 2017 (provisional)

**Twitter:** [www.twitter.com/statisticswales](http://www.twitter.com/statisticswales) | [www.twitter.com/ystadegaucymru](http://www.twitter.com/ystadegaucymru)



Cyhoeddwyd gan Y Gwasanaethau Gwybodaeth a Dadansoddi  
Llywodraeth Cymru, Parc Cathays, Caerdydd, CF10 3NQ  
Ffôn – Swyddfa'r Wasg **029 2089 8099**, Ymholiadau Cyhoeddus **029 2082 3332**  
**[www.llyw.cymru/ystadegau](http://www.llyw.cymru/ystadegau)**

Issued by Knowledge and Analytical Services  
Welsh Government, Cathays Park, Cardiff, CF10 3NQ  
Telephone – Press Office **029 2089 8099**, Public Enquiries **029 2082 5050**  
**[www.gov.wales/statistics](http://www.gov.wales/statistics)**



Llywodraeth Cymru  
Welsh Government

### Health services

- 91% of people were satisfied with the care they received from their [GP](#) at their last visit.
- 92% of people were satisfied with the care they received at their last appointment at an NHS [hospital](#).
- 90% were satisfied with the overall service they received from the emergency [ambulance](#) service, and 79% were satisfied with the time they had to wait for the ambulance to arrive
- 24% of those with a limiting long-term illness said they had a [personal care plan](#). 88% of those who had a personal care plan agreed that it helped them take care of their health and well-being.
- 72% of people have their [eyes](#) tested at least once every two years (7% every 6 months, 32% once a year and 33% once every two years). 16% of respondents have their eyes tested less than every two years and 12% never have their eyes tested.

### Social care services

- 52% of people agreed that good social care services are available in their local area (69% of social care users agreed with the statement).
- 9% had received help from care and support services in Wales in the last 12 months.
- 43% rated the carers as excellent, 38% as good and 12% as fair.

### Local authority services

- 53% agreed that their council provides high quality services, a lower proportion than in 2012-13 and 2013-14 when in both years, 57% agreed with the statement.
- 37% agreed that their local authority did all it could to improve the local area.

### Democracy and understanding

- 12% of people reported that they had contacted their local councillor in the previous 12 months. This varied by age, from 5% of young people aged 16-24 to 18% of people aged 65 to 74.
- Of those who had contacted their local councillor, 61% of people agreed that they had a good understanding of what their local councillor does for their local community and 55% agreed that their local councillor works closely with their local community.

### Media consumption

- Free to view television was the most popular source used to obtain news about Wales and Welsh issues, with 45% reporting that they get their news in this way. This was followed closely by the internet, with 38%.

### Active travel

- In the past week, 5% had cycled and 65% had walked for more than five minutes to get to a particular destination (rather than for exercise or recreation).
- The most common reason for walking was to get to local shops for small errands, with 43% of people who walked for more than 5 minutes having done so for that reason.
- The most common reason for cycling was to get to work (30% of those who cycled).
- 74% of children at primary schools and 87% of children at secondary schools usually walked to school, if their school was less than a mile away.

### Literacy and numeracy

- 81% of parents helped their child learn about letters or helped with reading and writing at least several times a week. 69% of parents helped their child with maths or numbers as frequently.
- Over 75% of parents were very confident helping their child aged 3 to 11 to read or write in English. 60% were very confident in their ability to help their child with their maths.
- On the whole, Welsh-speaking parents were far more confident to help their child read or write in English than in Welsh. 85% were very confident to help with English reading or writing, compared with 56% for Welsh reading and 50% for Welsh writing.

### **Sense of community**

- 79% said that people in their local area treated each other with respect and consideration.
- 79% of people said that in their local area people from different backgrounds get on well together.
- 82% felt like they belonged to their local area, less than in 2013-14 when 85% felt they belonged to their area.

### **Internet access and use**

- 78% of households had access to the internet. This has increased from 75% in 2013-14 and 73% in 2012-13. Of households with access to the internet, 21% of households said they had superfast broadband, 77% said they had broadband but not superfast, and 2% said they used another method at home such as a mobile connection.
- 81% of people said they personally used the internet. This varied with age: 99% of people aged 18 to 24 using the internet compared with 29% of people aged 75 or over.
- 56% of parents of children aged 7 to 15 said that the household did use parental control filters. 32% had heard about them but didn't use them, and 12% had never heard of them.

### **Personal finance**

- 60% of people had no difficulties keeping up with their bills and financial commitments. This was a higher proportion than in 2012-13 and 2013-14, when 48% and 50% respectively were able to keep up with their bills without difficulty.
- 4% of people said they had used the services of organisations that provide advice and support on debt problems in the last 12 months.

### **Material deprivation**

- 16% of people were materially deprived (that is, unable to afford certain things such as keeping the house warm enough, make regular savings, or have a holiday once a year).
- 9% of parents had materially deprived children (that is, being unable to afford certain things like warm winter coats for the child(ren), or to celebrate special occasions such as birthdays and Christmas).
- People in urban areas were more likely to be materially deprived than those in rural areas: 17% of people in urban areas were materially deprived, compared with 12% in rural areas.
- People in their 30s were the age group most likely to be materially deprived. 23% of people aged 30 to 39 were materially deprived, compared with 6% of people aged 70 or over.

### **Well-being**

- When asked to rate satisfaction with their lives on a scale of 0 (not at all satisfied) to 10 (completely satisfied), the average score given was 7.9. This is in line with averages in 2012-13 and 2013-14 (7.8 and 7.7 respectively)
- Young people aged 16 to 24 were the age group most satisfied with their lives, giving an average rating of 8.1. Those aged 45 to 64 were least satisfied, giving an average rating of 7.7.

### **Pet welfare**

- 47% of households had a pet. Of those with a pet, 62% had a dog, 39% a cat and 14% kept fish.
- Of those who had acquired a dog within the last 5 years, 46% had it insured. For cats, the figure was 21%; and for horses, 50%.
- 78% of households had had their dogs micro-chipped.

### **Arts, museums and heritage**

- 58% of people had been to an arts event in the last 12 months, 59% had visited an historic place, and 39% had been to a museum.
- 97% of people were satisfied with the arts and historic place they visited, and 96% were satisfied with the museum they visited.

## **Childcare**

- 49% of parents with a child aged 0 to 14 needed to arrange for their child to be looked after so that they could work, study or attend training.
- 46% of parents who had used formal childcare found it difficult to afford.
- 74% of parents found it easy to get childcare that fits around their working hours. 32% of parents found it difficult to find formal childcare (that is, childcare provided by people other than family and friends) during school holidays.

## **Play**

- 54% of parents with a child aged 1 to 10 were satisfied with the play facilities in their local area; 38% with a child aged 11 to 15 were satisfied.
- Of parents with a child aged 1 to 10 who were dissatisfied, 83% said there was a lack of suitable outdoor public places for their child to play and 64% said there was a lack of suitable indoor spaces.
- Of parents with a child aged 11 to 15 who were dissatisfied, 77% cited a lack of suitable outdoor public places and 79% said there was a lack of indoor public places. 64% said there were too few clubs or organised activities

## **Recycling**

- 82% of people were satisfied with the recycling collection service provided by their council. This varied from 69% in Torfaen to 88% in Caerphilly.
- 83% of people had donated or sold second-hand items in some way, and 60% had bought or received a second-hand item.
- Charity shops were the most popular way of donating and buying second-hand items. 71% had donated to a charity shop in the previous 12 months and 37% had bought from a charity shop in the same period.

## **Future Generations**

- 59% of people thought that the gap between rich and poor will be larger in 25 years' time, and 59% of people thought that the effects on climate change will be worse in 25 years.
- 34% of people thought that in 25 years' time people will be less healthy; and 36% thought people would be healthier
- 31% of people thought that in 25 years' time the standard of living in Wales will be worse than today; and 31% thought the standard of living would be better.

## **Accommodation**

- 94% of people were satisfied with their accommodation. Satisfaction varied by tenure. 97% of owner-occupiers were satisfied with their accommodation, compared with 90% of those in private rented accommodation and 83% of those who were in social housing.
- 74% of those who rented their accommodation were satisfied with the way their landlord repairs and maintains their homes.

## **Energy saving measures**

- 14% of people had switched energy supplier in the last year. 36% had switched supplier at an earlier date and 50% of people said they had never switched supplier.
- 94% had their roof insulated, 74% had cavity wall insulation, and 31% had solid wall insulation.
- 4% of all properties had solar panels or other renewable energy measures.

## **Entrepreneurship**

- 35% of people aged 16 to 65 would like to start their own business in the future. Of those, 20% said it was very likely they would do so, 24% fairly likely, 40% not very likely and 15% not likely at all.

## **Armed Forces**

- 7% were either currently serving in the UK Armed Forces or had previously served in the UK Armed Forces.
- 16% had at least one member of their immediate family who was currently serving or who had previously served in the UK Armed Forces.
- 19% of respondents were classed as being in the Armed Forces community (i.e. currently or previously serving themselves, or with a spouse/partner or parent currently or having previously served).

## Contents

Welsh Government .....	8
Democracy and understanding .....	10
Media consumption .....	11
Local authority services.....	12
Health.....	14
GP services.....	14
Hospitals .....	15
Ambulance services .....	16
Involvement with health services .....	17
Personal care plans .....	18
Eye care.....	19
Overall satisfaction with health services in Wales .....	20
Social care .....	21
Use of Welsh in health and social care services .....	23
Active travel – adults.....	24
Active travel – children going to school .....	26
Literacy and numeracy – parental support.....	27
Views on the education system in Wales .....	29
Internet access and use .....	30
e-Safety.....	32
Public service websites .....	33
Sense of community.....	34
Personal finances.....	35
Material deprivation (section revised 14 Sep 2015) .....	36
Well-being .....	39
Pet welfare .....	40
Arts, museums and heritage .....	41
Childcare.....	43
Play.....	44
Recycling .....	45
Future generations.....	47
Accommodation .....	48
Energy saving measures.....	49
Entrepreneurship .....	50
Armed forces.....	51
Terms and definitions.....	52
Key quality information.....	53

## List of charts

Chart 1: Satisfaction with the work of the Welsh Government, by age (a)	8
Chart 2: Strong agreement with statements about local councillor, by area deprivation	10
Chart 3: Sources of news about Wales and Welsh issues, by age group	11
Chart 4: Proportion of people who agree or disagree that their council provides high quality services, by local authority	12
Chart 5: Proportion of people who agree or disagree that their council does all it can to improve the local area, by local authority	13
Chart 6: Satisfaction with care received at a GP, by Local Health Board	14
Chart 7: Satisfaction with care received at hospital, by Local Health Board	15
Chart 8: Satisfaction with emergency ambulance response time, by Local Health Board	16
Chart 9: Local health services: involvement and information	17
Chart 10: Proportion who had their eyes tested at least once every two years, by age	19
Chart 11: Overall satisfaction with health services, by Local Health Board	20
Chart 12: Extent of agreement that 'good social care services are available in the area', by experience of social care services	21
Chart 13: Proportion who agreed with various statements, by experience of social care services	22
Chart 14: Proportion of Welsh speakers who spoke Welsh with health and social care staff, split by their preferred language to communicate with health and social care staff	23
Chart 15: Purpose of most recent 'active travel' journey <sup>(a)</sup>	24
Chart 16: Frequency of cycling or walking as a means of transport, by gender	25
Chart 17: Usual mode of transport used by children to get to school (a)	26
Chart 18: Parental support – child aged 3 to 7	27
Chart 19: Parental confidence to help child aged 3 to 11 with English and maths	27
Chart 20: Welsh speaking parent's confidence to help child aged 3 to 11	28
Chart 21: Average rating given for the state of education in Wales, by local authority (a)	29
Chart 22: Satisfaction with speed of connection, by type of broadband	30
Chart 23: Personal internet use, by age group	31
Chart 24: Parental source of advice or information about internet safety for child	32
Chart 25: Proportion who have completed an online transaction on a local public service website, by age group	33
Chart 26: Proportion of people who agreed with statements about people in their local area, by age.	34
Chart 27: Ability to keep up with all bills and commitments without difficulty, by age and year	35
Chart 28: Material deprivation	36
Chart 29: Child material deprivation (a)	36
Chart 30: Proportion of households in material deprivation, by Local Authority (revised)	38
Chart 31: Satisfaction with aspects of life	39
Chart 32: Proportion of households that owns type of pet (a) (b)	40
Chart 33: Reason for not attending an arts event, historic place or museum in the last 12 months (a)	42
Chart 34: How easy or difficult was it to get childcare for child aged 0 to 14	43
Chart 35: Level of satisfaction with play area or meeting place in local area	44
Chart 36: Satisfaction with the recycling collection service provided, by local authority	45
Chart 37: Percentage who had sold or given away items compared with the percentage that had bought or received second-hand or used items, by method	46

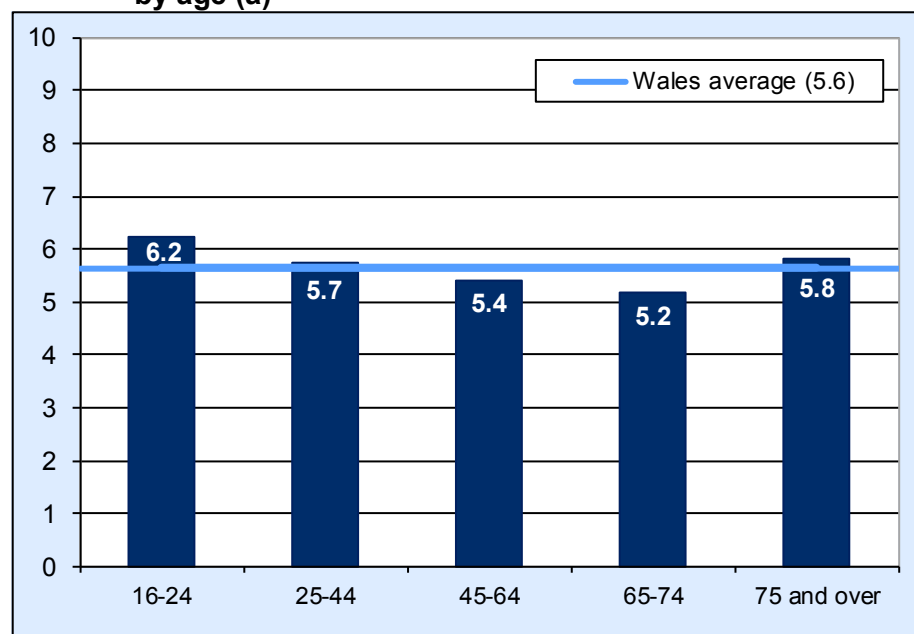
Chart 38: People’s thoughts on aspects of Wales in 25 years’ time	47
Chart 39: Satisfaction with the way their landlord repairs and maintains their homes by type of landlord	48
Chart 40: Energy saving measures, by tenure type	49
Chart 41: Would like to start their own business in the future, by likelihood, age and gender	50
Chart 42: Percentage of people who are in the Armed Forces Community by age	51

## Welsh Government

The [Programme for Government](#) is the plan of action for the Welsh Government. It outlines what the Welsh Government aims to achieve and how its achievements are measured. Programme for Government commitments include ensuring that the population of Wales knows what the Welsh Government is doing and how well it is performing. The National Survey is used as a way to measure this.

In the National Survey people were asked how satisfied they were with the way the Welsh Government is doing its job. Answers were given on a scale of 0 (extremely dissatisfied) to 10 (extremely satisfied). The average score given was 5.6. This was not significantly different from 2012-13 and 2013-14. Chart 1 shows how satisfaction with the Welsh Government varied by age.

**Chart 1: Satisfaction with the work of the Welsh Government, by age (a)**



- Young adults (aged 16 to 24) and older people (aged 75+) were more satisfied with the way the Welsh Government is doing its job, giving an average score of 6.2 and 5.8 respectively.
- People aged 65 to 74 were the least satisfied age group, giving an average score of 5.2.

(a) Answers were given on a scale of 0 (extremely dissatisfied) to 10 (extremely satisfied).

As with all other questions, “Don’t know” responses have been excluded from the analysis. It is worth noting that the proportion of respondents answering “Don’t know” for this question was much higher than for many other questions, at 10%. In contrast, the average proportion answering “Don’t know” for a similar question about health services in Wales was 2%.<sup>1</sup> No significant differences in satisfaction ratings were found when analysing by gender, geographical region or whether people considered themselves to be Welsh.

The [European Social Survey 2012](#) asked a similar question about satisfaction with government, and reported an average score of 4.1 (for the UK government) and an average of 3.8 across Europe.

<sup>1</sup> The proportion answering “Don’t know” for the [education](#) system was 18% where the household did not contain anyone under 19, but 2% where it did.



However, there are a number of differences between the surveys.<sup>2</sup> Please note that for detailed comparisons with other European countries, the National Survey results from 2012-13 should be compared with the European Social Survey results from 2012. These comparisons are available in a [separate report](#). Figures from the 2014 European Social Survey will be available in October 2015. In the National Survey in 2014-15, people were asked how much they had seen or heard about the work of the Welsh Government over the last 12 months. 8% stated they had seen or heard 'a great deal', 29% a 'fair amount', 41% 'just a little', and 12% had seen or heard about its work but know nothing about it. 11% had not seen or heard anything about the work of the Welsh Government in the last 12 months. There are no real differences between the 2012-13, 2013-14 and 2014-15 results.

---

<sup>2</sup> For example, the powers of the devolved Welsh Government are different from those of the UK and other European governments; the other questions asked in the two surveys may affect responses to this question; and the time periods covered by the two surveys are different. The ESS results are based on fieldwork carried out in September to December 2012, compared with the National Survey fieldwork carried out over a full year from April 2014 to March 2015. For the closest comparison (National Survey 2012-13 results compared with ESS 2012) see [here](#).

## Democracy and understanding

The [Programme for Government](#) is the plan of action for the Welsh Government. One of the commitments it contains is to strengthen local democracy, in part by ensuring that the Welsh public have a better understanding of the role of their local councillors to represent their constituents and improve public services.

In the National Survey people were asked whether they had contacted their local councillor in the past 12 months, and asked whether they agreed or disagreed with the following two statements:

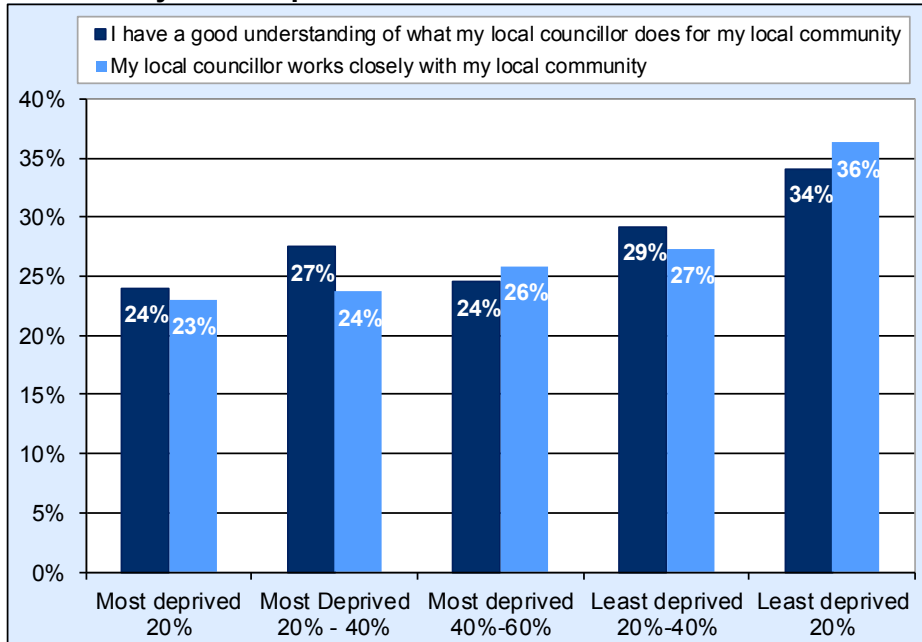
- I have a good understanding of what my local councillor does for my local community.
- My local councillor works closely with my local community.

12% of people reported that they had contacted their local councillor in the previous 12 months. This varied by age, from 5% of young people aged 16-24 to 18% of people aged 65 to 74. Respondents with higher levels of qualifications and those who had a greater awareness of the work of the Welsh Government were more likely to have contacted their local councillor. 23% of those who had seen or heard 'a great deal' about the Welsh Government had contacted their local councillor compared with 8% of those who hadn't seen or heard about the work of the Welsh Government.

Of those who had contacted their local councillor 61% agreed (28% strongly, 33% tending to agree) that they had a good understanding of what their local councillor does for their local community. 55% agreed (27% strongly, and 28% tending to agree) that their local councillor works closely with their local community.

Chart 2 shows how strong agreement with these two statements varied by area deprivation.

**Chart 2: Strong agreement with statements about local councillor, by area deprivation**



- 24% of those in the most deprived areas who had contacted their councillor strongly agreed they had a good understanding of what their local councillor did for their local community, compared with 34% in the least deprived areas.
- 23% of those who live in the most deprived areas strongly agreed their local councillor works closely with their local community, compared with 36% in the least deprived areas.

Of those who had a good understanding of what their local councillor does for the area, 77% agreed that their local councillor works closely with their local community, compared with only 12% of those who didn't have a good understanding of what a local councillor did.

Of those who felt that they belonged to their local area, 50% felt that their local councillor worked closely with their local community, compared with 39% of those who didn't feel they belonged to their local area.

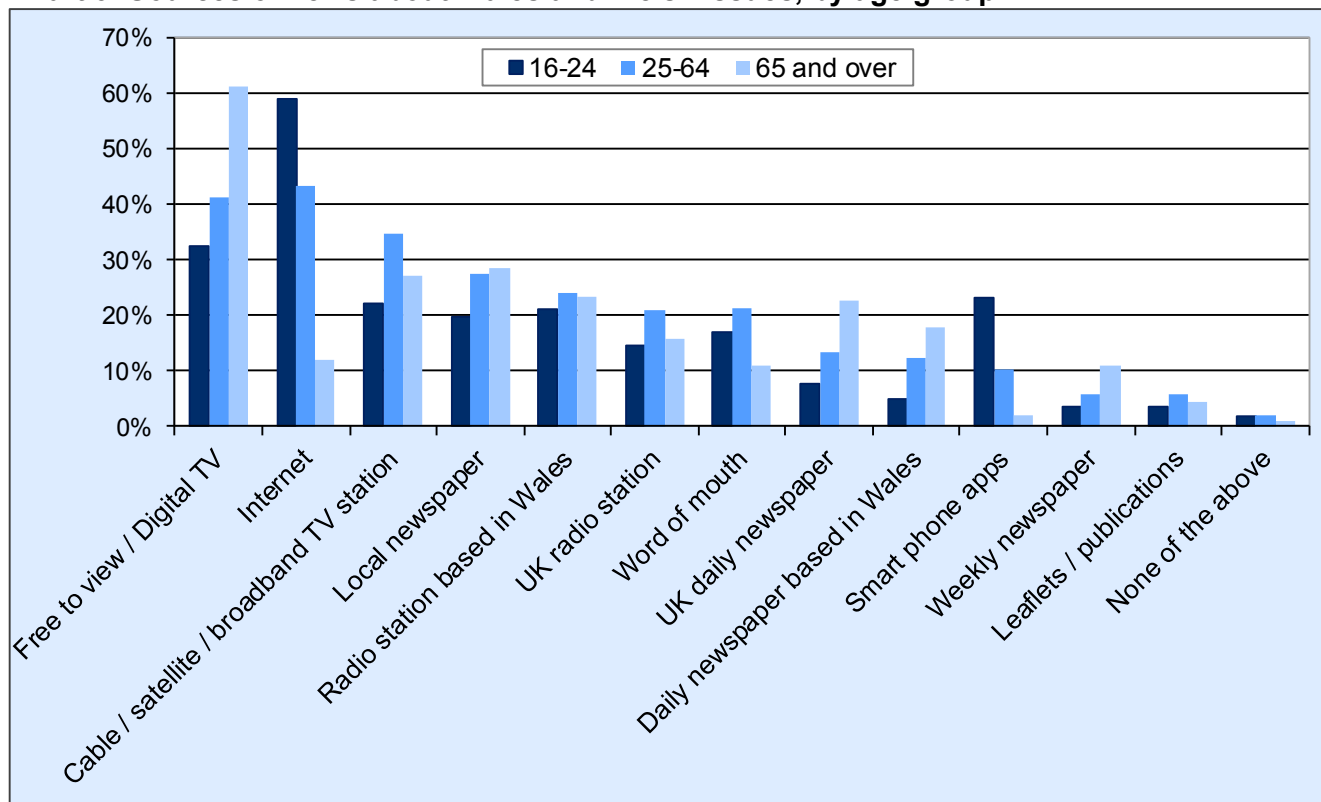
## Media consumption

The Welsh Government is interested in how people get their news about what's happening in Wales and about Welsh issues (not necessarily only about the Welsh language). The [Commission on Public Service Governance and Delivery](#) (chaired by Sir Paul Williams) emphasised the need for Welsh public bodies to develop their public engagement and communication strategies. Accordingly, a new question was introduced in the 2014-15 National Survey which asked people to select the main ways they get news about Wales. This evidence will be used to help identify ways to engage with Welsh citizens and to plan Welsh Government communications.

Free to view television was the most popular source used to obtain news about Wales and Welsh issues, with 45% reporting that they get their news in this way. This was followed closely by the internet (38%).

Chart 3 shows how the results differ for various age groups. For those aged 65 and over, free to view digital TV was the most commonly accessed source for Welsh news (61%). For those aged 16 to 24, the internet was the main source used (59%), this compares with 12% of those aged 65 and over. Local newspapers and radio stations based in Wales were a common source of news for both the 25 to 64 and the 65+ age groups. More recent media developments such as smartphone apps were mainly popular with 16 to 24 year olds (23%).

**Chart 3: Sources of news about Wales and Welsh issues, by age group**



## Local authority services

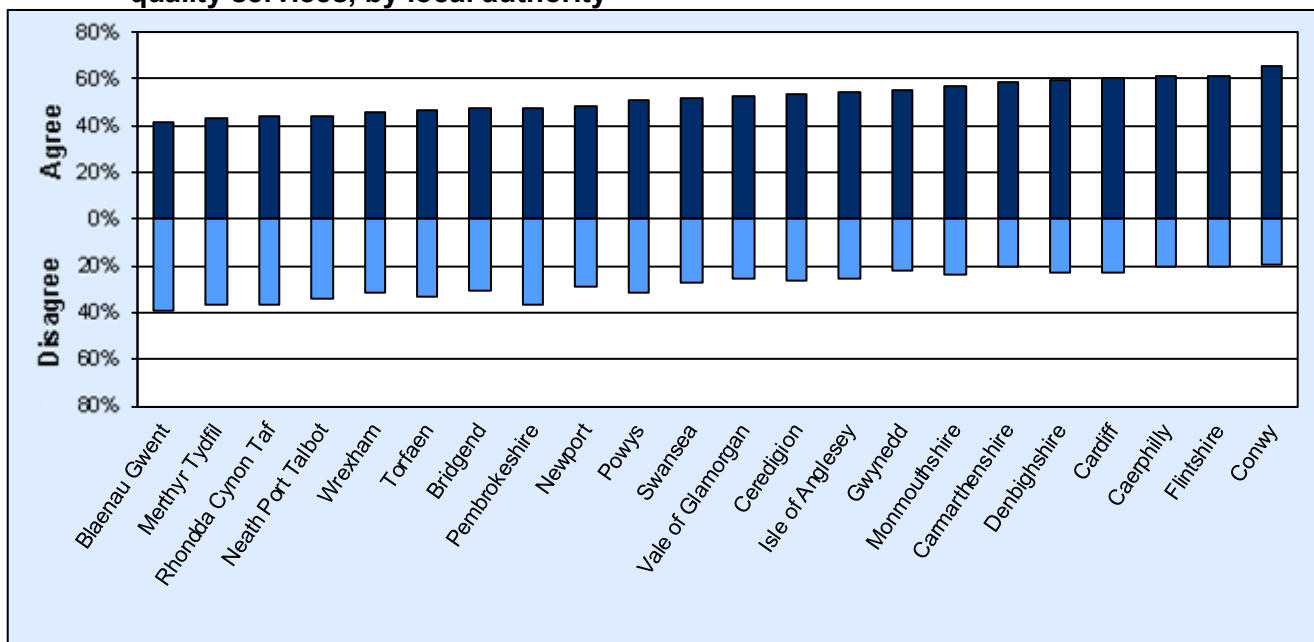
There are currently 22 local authorities in Wales, responsible for delivering a wide range of services in their area including social services, education and housing. Local authorities work within powers laid down in Acts of Parliament and Acts passed by the National Assembly for Wales. The Welsh Government gathers evidence from various sources to monitor each local authority’s performance (e.g. audit, inspection and regulation reports, performance data, and local authorities’ self-reported progress towards their strategic objectives). Earlier this year, the Welsh Government set out its vision for local government in Wales in the White Paper [Power to Local People](#) based on a smaller number of local authorities by 2020. The documents also included proposals for a new performance framework based on timely management information and allowing comparison of local authority performance.

The National Survey included a number of questions about local authority services in Wales to help understand people’s views on those services. As well as being a valuable source of information for the Welsh Government, the results will also be of interest to other public sector organisations such as local authorities themselves, the Welsh Local Government Association, and the Wales Audit Office.

[Previous research](#) using 2012-13 National Survey results found that the large majority of the variation in overall satisfaction with local authority services is due to differences between individuals, and not to which local authority they live in.<sup>3</sup> The same research found that key factors influencing overall satisfaction are people’s views on how well maintained the local area is, and their views on how good the local authority is at communicating about its performance.

People were asked whether they agreed or disagreed with the statement ‘my council provides high quality services’. Overall, 53% agreed with the statement, this was lower than in 2012-13 and 2013-14 when in both previous years, 57% agreed with the statement. People in the least deprived<sup>4</sup> areas were slightly more likely (58%) to agree with this statement than those who lived in the most deprived areas (50%). This varied by local authority from 42% in Blaenau Gwent to 65% in Conwy. The results are shown for each local authority in Chart 4.

**Chart 4: Proportion of people who agree or disagree that their council provides high quality services, by local authority**



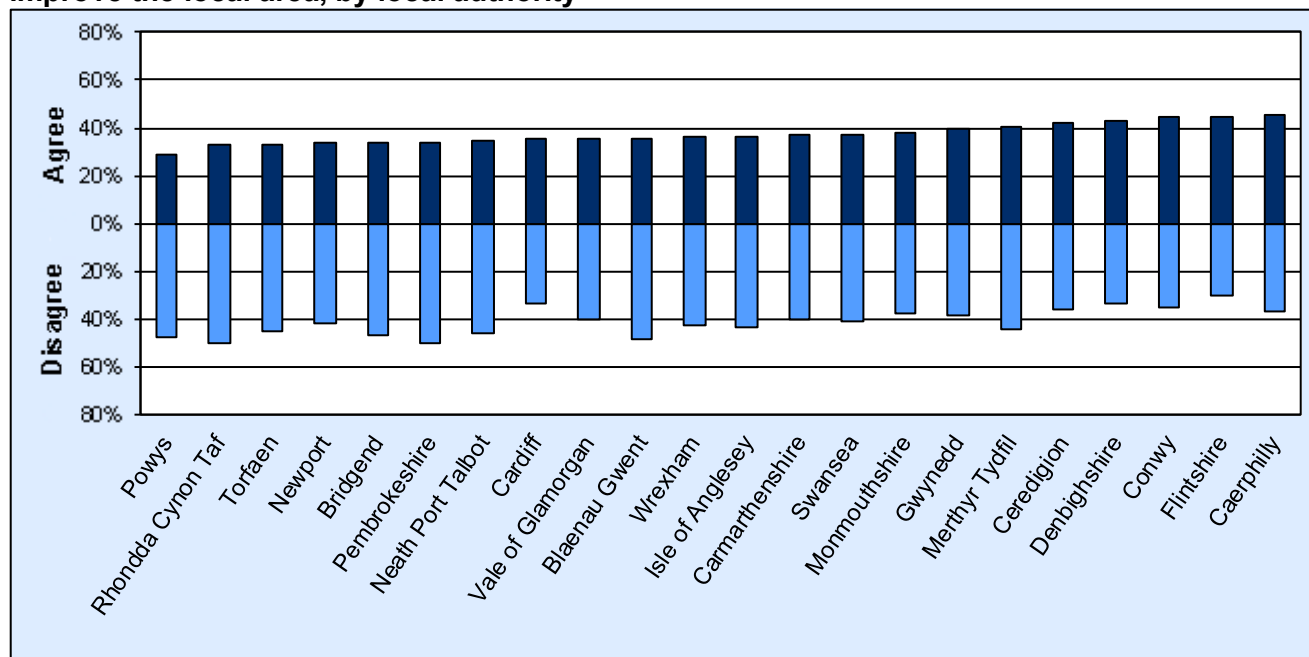
<sup>3</sup> See [report on satisfaction with local authority services](#) based on results from the National Survey in 2012-13.

<sup>4</sup> See [Terms and definitions](#) in the Annex to see how deprivation has been derived.

This question was also asked in the [2013 Scottish Household Survey](#), where 45% of people in Scotland agreed that their 'local council provides high quality services'.<sup>5</sup>

In 2014-15, a new question was included on whether people agree or disagree that their council 'does all it can to improve my local area'. Overall, a smaller proportion of people agreed with this statement (37%) than agreed that their local council provides high quality services (53%). The proportion agreeing that their council does all it can to improve the local area varied from 29% in Powys to 45% in Caerphilly, as shown in Chart 5.

**Chart 5: Proportion of people who agree or disagree that their council does all it can to improve the local area, by local authority**



<sup>5</sup> The results provide useful context, but there are some differences between the two surveys. The National Survey precedes its questions on local authority services with a clarification of what services people should take into account, while the Scottish Household Survey (SHS) doesn't. The SHS includes this question among a battery of questions about local services, which are randomly rotated, which slightly reduces the comparability with National Survey. The SHS also covers an earlier time period (2013, compared with 2014-15 in the National Survey; although the 2012-13 and 2013-14 National Survey also found higher levels of satisfaction in Wales compared with the 2013 SHS). More information on question comparability can be found [here](#).

## Health

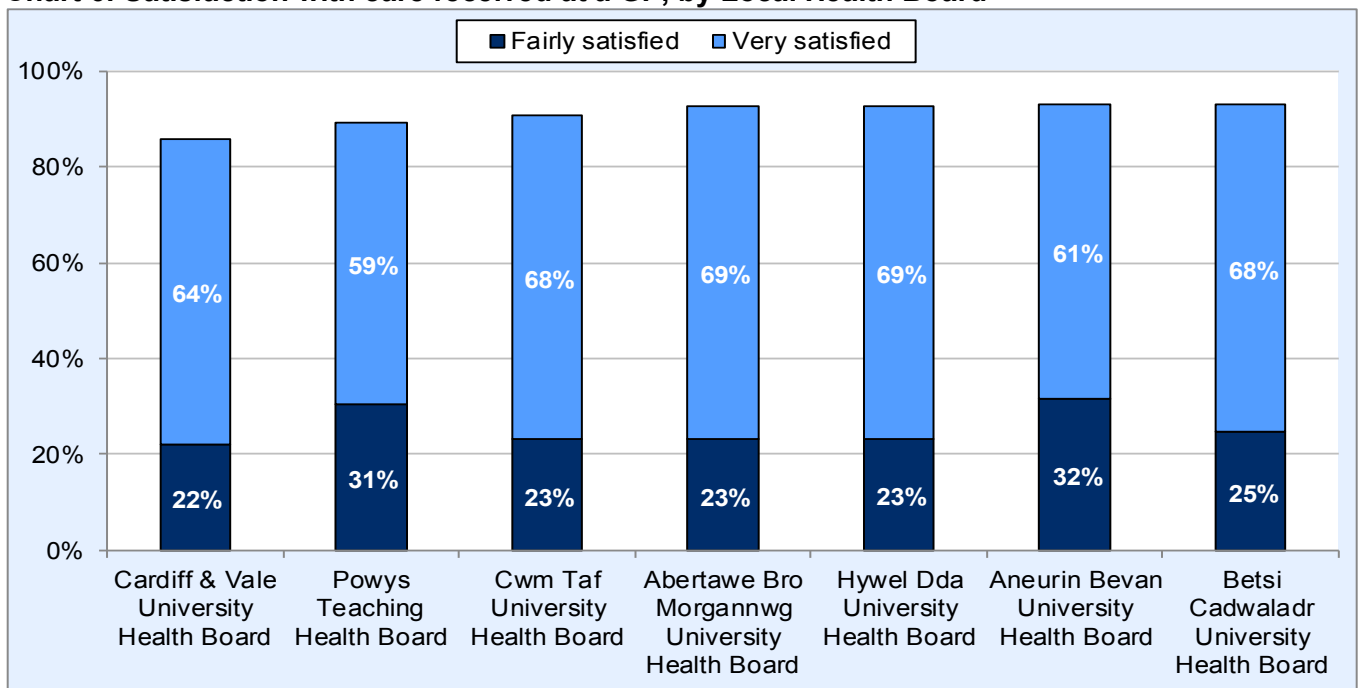
The Welsh Government has made a commitment to take into account the views of health care users when measuring the performance of the NHS in Wales. [Together for Health](#), a five year plan for NHS Wales, stated that the Welsh Government will develop a national approach to measuring the experience of people using health services. One of the ways in which the Welsh Government measures people's experiences is through the National Survey.

The National Survey included a series of questions about people's experiences of GP surgeries, NHS hospitals and ambulances. Questions were asked about satisfaction with health services in general, ease of access to health care services, whether people felt they were treated with dignity and respect, and satisfaction with the care they received.

### GP services

75% of people had seen a GP about their own health in the previous 12 months. Of these, 91% were satisfied (66% very satisfied and 25% fairly satisfied) with the care they received, this was not significantly different to the proportion in 2012-13 and 2013-14. Chart 6 shows the proportion who were very or fairly satisfied with the care they received, split by Local Health Board.<sup>6</sup>

**Chart 6: Satisfaction with care received at a GP, by Local Health Board**



As can be seen from Chart 6, there was not a great deal of variation between Health Boards. The proportion of people satisfied with the care they received at their GP appointment varied from 86% in Cardiff & Vale University Health Board to 93% of people living in Betsi Cadwaladr University Health Board. [Previous research](#) has found that the large majority of the variation in satisfaction with GP care is due to differences between individuals, and not to which Health Board they live in.<sup>7</sup>

People aged 65 to 74 were found to be more satisfied with the care they received from their GP (95%) than people aged between 16 to 24 (83%).

People who had a GP appointment in the last 12 months were asked how easy or difficult it was to get a convenient appointment. 37% found it difficult (18% very difficult and 19% fairly difficult) to make a convenient appointment.

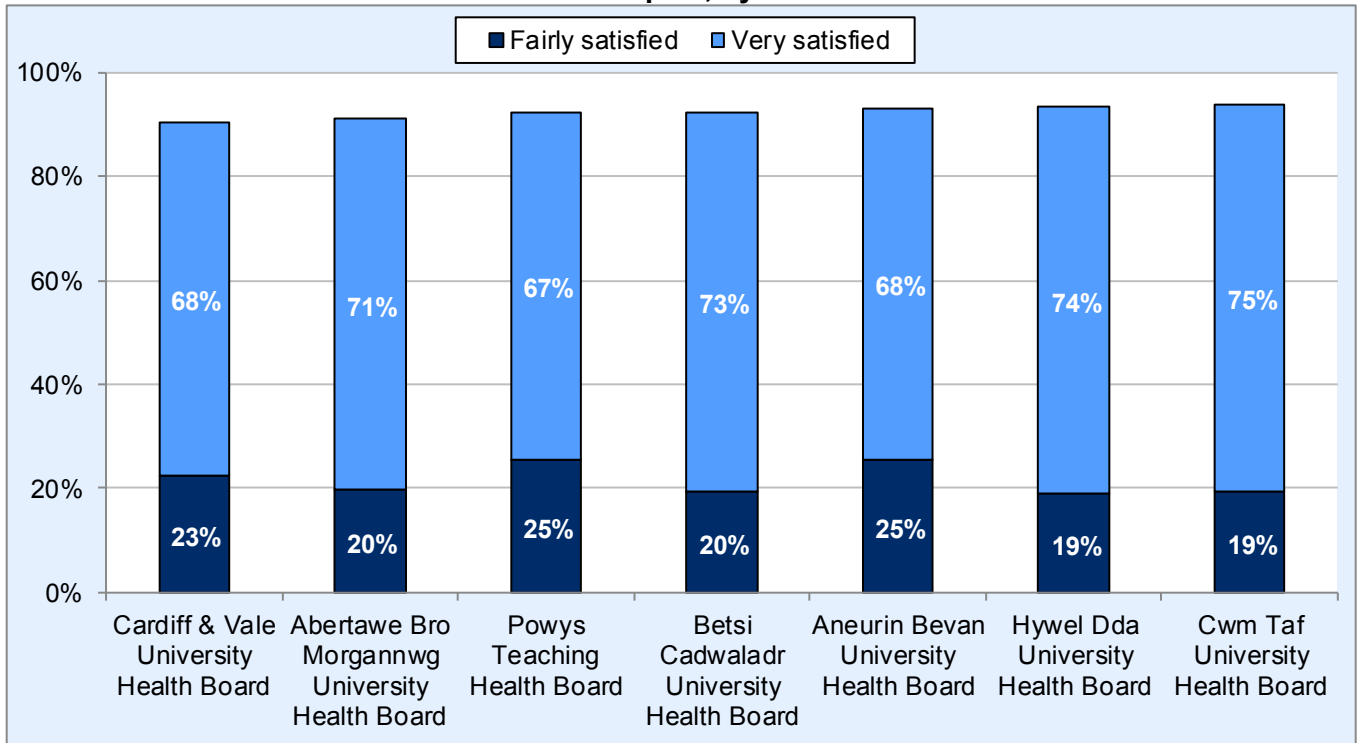
<sup>6</sup> Information on Local Health Boards can be found [here](#)

<sup>7</sup> See [report on satisfaction with health services](#) based on results from the National Survey in 2012-13.

## Hospitals

44% of people had attended a hospital appointment in the last 12 months. Of these, 92% were satisfied (71% very satisfied and 21% fairly satisfied) with the care they received (this includes day patients, outpatients and inpatients). Similar proportions were satisfied in 2012-13 and 2013-14. Chart 7, based on the National Survey results from 2014-15, shows the proportion who were very or fairly satisfied with the care they received at hospital split by Local Health Board.

**Chart 7: Satisfaction with care received at hospital, by Local Health Board**



Results did not vary greatly by Health Board. The proportion of people satisfied with the care they received at their hospital appointment varied from 90% in Cardiff & Vale University Health Board to 94% in Cwm Taf University Health Board. As with satisfaction with GP care, previous research has found that the large majority of the variation in satisfaction with hospital care is due to differences between individuals, and not to which Health Board they live in.<sup>8</sup>

People aged 75 and over tended to be more satisfied with the hospital care they received (95%) compared with people aged 25-44 who tended to be the least satisfied with the hospital care they received (89%).

<sup>8</sup> See [report on satisfaction with health services](#) based on results from the National Survey in 2012-13.

## Ambulance services

The [Programme for Government](#) outlines the Welsh Government’s priorities for the NHS in Wales. These include improving the quality of and access to emergency care and ambulance services.

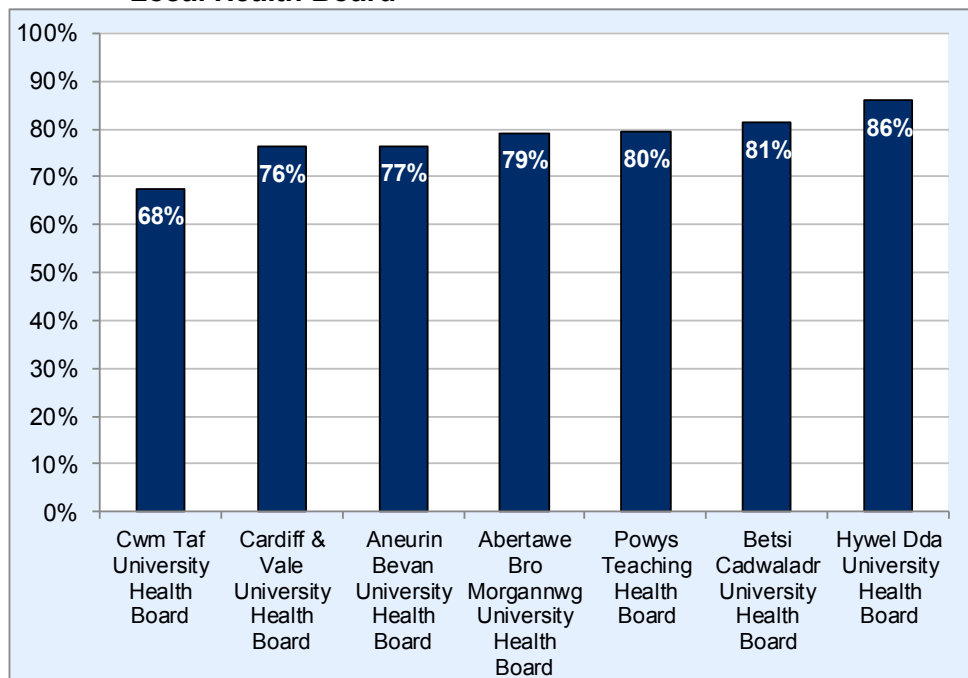
To help understand the issues, in 2014-15 a series of questions were added to the National Survey about people’s experiences of ambulance services. These questions covered satisfaction with the response time, the service they received, and whether they had trust in the crew’s professional skills.

In the last 12 months, 14% of people contacted the emergency ambulance service in Wales. Of these, 90% were satisfied (79% very satisfied and 11% fairly satisfied) with the overall service they received. Similar questions were also asked in the [2007 Living in Wales survey](#)<sup>9</sup>, which found that 13% of people had contacted the emergency ambulance service in the last 12 months. Of these 94% were satisfied with the overall service they received. It should be noted that there are some differences in how these two surveys were carried out, which may have contributed to the difference in results.<sup>9</sup>

Of those who had contacted the emergency ambulance service in Wales in the last 12 months, 79% were satisfied with the time they had to wait for the ambulance to arrive (58% very satisfied and 20% fairly satisfied). In the [2007 Living in Wales survey](#), 86% were satisfied with the time to wait for the ambulance to arrive (69% very satisfied and 17% fairly satisfied). However, performance data on [ambulance response times](#) show that there has been little change in response performance between 2006-07 and 2013-14.

Local Health Boards have been responsible for providing emergency ambulance services since April 2014; the Welsh Ambulance Services NHS Trust delivers emergency ambulance services on their behalf. Chart 8 shows how satisfaction with response time varied by Local Health Board.

**Chart 8: Satisfaction with emergency ambulance response time, by Local Health Board**



- 68% of those in Cwm Taf University Health Board were satisfied with the time the ambulance took to arrive, compared with 86% of those in Hywel Dda University Health Board.

Of those who had contacted the emergency ambulance service in Wales in the last 12 months, 97% had trust and confidence in the ambulance crew’s professional skills (91% said ‘yes, definitely’ and 6% ‘yes, to some extent’).

<sup>9</sup> The Living in Wales Survey was carried out with the household representative (the person who owns/rents the home, the oldest person or the person who earns the most) and not a randomly-selected adult aged 16+ as in the National Survey.

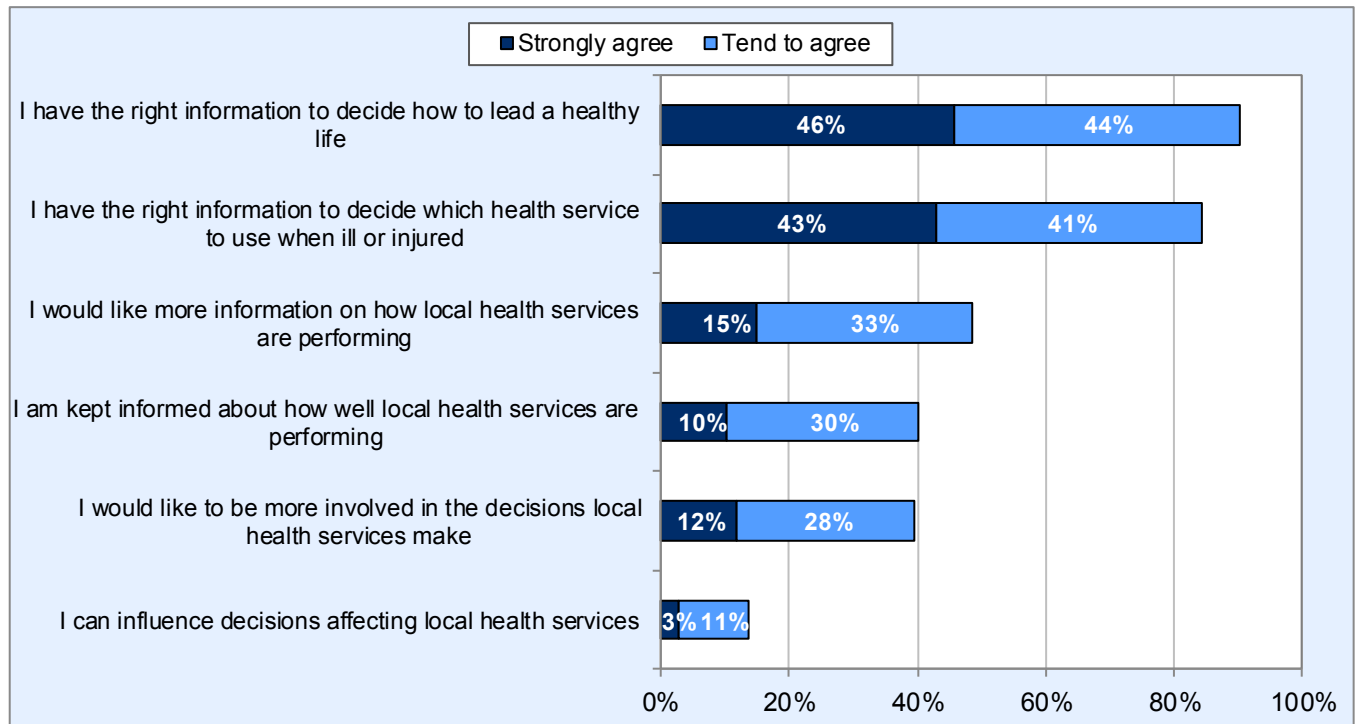


## Involvement with health services

The Welsh Government is interested in knowing about whether people feel engaged with public services so that it can work to increase levels of engagement and, through increased engagement, improve public services.

The National Survey included a number of questions about people's involvement in local health services. People were asked to agree or disagree with a series of statements, as set out in Chart 9.

**Chart 9: Local health services: involvement and information**



90% of people agreed that they have the right information to decide how to lead a healthy life (46% strongly agree and 44% tend to agree). 84% of people agreed that they have the right information to decide which health service to use when ill or injured (43% strongly agree and 41% tend to agree).

15% of people strongly agreed that they would like more information on how local health services are performing. This figure has decreased since 2013-14, when 20% strongly agreed. 10% of people strongly agreed that they felt kept informed about how local health services are performing. This proportion has increased since 2013-14, when 6% strongly agreed.

## Personal care plans

The [Programme for Government](#) states that people with mental health, cancer and long-term conditions should have a personal care plan, proportionate to their need. The purpose of a personal care plan is to promote a partnership between the medical professional and the person with the long-term condition. The care plan is a recorded summary of the agreed options for care and the goals for the individual to achieve. It can be done through a conversation with their doctor or supplied in writing. The Welsh Government has produced [guidance](#) on agreeing care with people who have long-term conditions. It is deemed important that the individual feels well informed and supported in managing the impact of their condition on their day-to-day life.

The National Survey found that 25% of respondents had a condition or illness that reduced their ability to carry out day-to-day activities. The [2011 Census](#)<sup>10</sup> reported that 23% of people in Wales had a long-term health problem or disability that limited their day-to-day activities (either a little or a lot). The [Welsh Health Survey](#)<sup>10</sup> reported that 33% of adults said their day-to-day activities were limited because of a health problem or disability lasting longer than 12 months.

In the National Survey, of the 25% of people who had a condition or illness that reduced their ability to carry out day-to-day activities a quarter (24%) said they had a personal care plan. 88% of those who had a personal care plan agreed that their personal care plan helped them take care of their health and well-being (41% strongly agree and 46% tend to agree).

---

<sup>10</sup> While the results are broadly comparable, there are differences between the Welsh Health Survey (WHS), Census and National Survey that should be borne in mind. For example the Census is not based on a sample of people, and the WHS is a self-completion survey whereas the National Survey is carried out face to face.

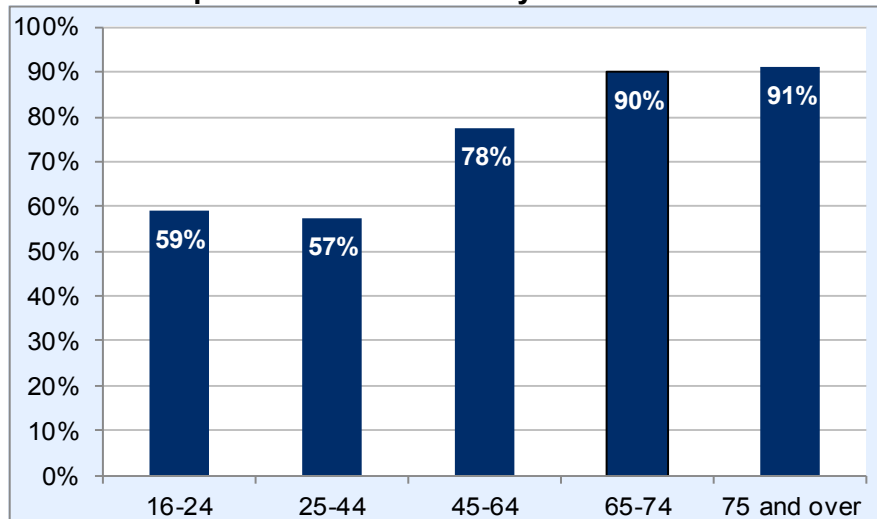
## Eye care

The Welsh Government aims to raise awareness of the importance of eye health and the need to use eye care services in order to prevent sight loss and improve eye health in Wales. [Together for Health: the Eye Care Delivery Plan for Wales](#) outlines a five year plan to improve eye health for people in Wales, and aims to encourage more people to have regular eye tests. It is recommended that most people should get their eyes tested every two years unless advised by an ophthalmic practitioner to have them tested more frequently.<sup>11</sup>

The National Survey asked respondents how often they had their eyes tested, why they haven't had their eyes tested more frequently, and who they would contact for help in the first instance if they had pain or redness in their eye.

72% of people had their eyes tested at least once every two years (7% every 6 months, 32% once a year and 33% once every two years). 16% had their eyes tested less than every two years, and 12% never had their eyes tested. Chart 10 shows that the proportion of people who had their eyes tested at least once every two years varies by age.

**Chart 10: Proportion who had their eyes tested at least once every two years, by age**



- 57% of people aged 25 to 44 had their eyes tested at least once every two years, compared with 91% of people aged 75 or over.

77% of women had their eyes tested at least once every two years, compared with 66% of men. This finding is similar to the [Health Survey for England 2013](#), where 71% of women had their eyes tested at least every two years, compared with 59% of men.<sup>12</sup>

People who had their eyes tested less than at least once every two years were asked why they hadn't had their eyes tested more frequently.<sup>13</sup> 69% said that this was because they hadn't experienced any eye problems, 20% hadn't had a reminder, 14% were too busy, and 4% said eye tests were too expensive.

In Wales, if you have any eye problem that requires urgent attention, it is advised that an optometrist (optician) is the best person to contact in the first instance. [Together for Health: the Eye Care Delivery Plan for Wales](#) also aims to ensure that more people are aware of the most appropriate point to access eye care services. A public education campaign designed to achieve this was launched in April 2015. The results of the National Survey from 2014-15 will be used to measure any change in public behaviour following the launch of the campaign.

All respondents in the National Survey were asked who they would contact in the first instance if they had any pain or redness in their eye<sup>13</sup>. 60% said they would contact their GP, 34% their optician, 4% their family, 3% a pharmacist, and 3% a hospital.

<sup>11</sup> More information on eye tests are available [here](#).

<sup>12</sup> While broadly comparable, there are methodological differences between the Health Survey for England and the National Survey for Wales.

<sup>13</sup> Respondents were able to select more than one answer if applicable.

## Overall satisfaction with health services in Wales

People were asked what they thought of the overall state of health services in Wales, irrespective of whether they had used any health services in the previous 12 months. For this question respondents were asked to consider all aspects of the NHS services, from GPs to pharmacies, NHS dentists and opticians, community health services, and hospitals. Answers were given on a scale of 0 (extremely bad) to 10 (extremely good). The average score given was 6.3.

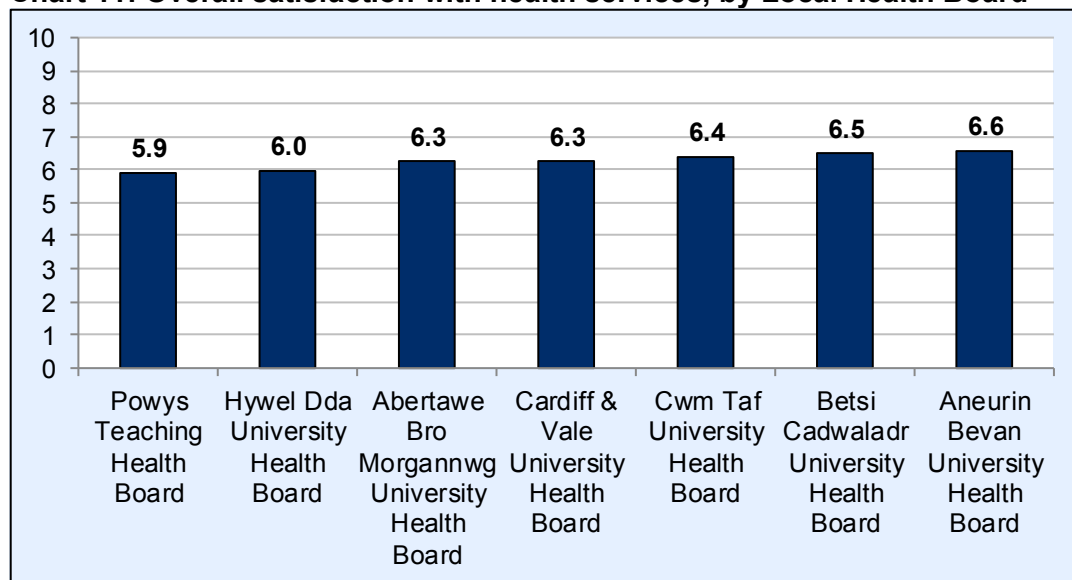
In 2012, the [European Social Survey](#) (ESS) asked the same question of respondents across 29 European countries, including the UK. There was no statistically significant difference between the UK national average in 2012 (6.3) and the Wales average in 2014-15 (6.3). However, the average rating across European countries participating in the ESS was 4.9, substantially lower than the UK and Wales results.<sup>14</sup> (Please note that for detailed comparisons with other European countries, the European Social Survey results from 2012 should be compared with the National Survey results from 2012-13. These comparisons are available in a [separate report](#). Figures from the 2014 European Social Survey will be available in October 2015.)

People who had a hospital appointment in the last 12 months were significantly more satisfied with the overall state of the health service, with an average score of 6.4, than those who did not have a hospital appointment (6.1). There was no significant difference in satisfaction with the health service between those who had a GP appointment in the last 12 months and those who did not.

Older people aged 75 and over and younger people aged 16-24 gave a higher rating on average for health services in Wales (7.1 and 6.6 respectively) than people aged 45 to 64 (6.0).

Chart 11 shows that overall satisfaction with health services varies by Local Health Board. People in Powys Teaching Health Board were significantly less satisfied (5.9) than those in Aneurin Bevan University Health Board (6.6).

**Chart 11: Overall satisfaction with health services, by Local Health Board**



While some of the health boards scores have changed from the previous National Survey in 2013-14, the only change that was statistically significantly was for Aneurin Bevan University Health Board, which increased from 6.2 in 2013-14 to 6.6 in 2014-15.

<sup>14</sup> While the results are broadly comparable, there are differences between the ESS and the National Survey that should be borne in mind. For example, The National Survey for Wales question has an introduction that prompts respondents to think about the full range of healthcare provision.

## Social care

Social care refers to support for people such as the elderly, children, and people who have disabilities or social needs. Social care is also designed to support the families and carers of such people.

[The Social Services and Well-being \(Wales\) Act 2014](#) and the [Regulation and Inspection of Social Care \(Wales\) Bill 2015](#) provide the statutory frameworks to deliver on the Welsh Government’s commitment to transform social care in Wales. The Act will come into force in April 2016, and the Bill in 2017. They are designed to improve well-being and the quality of care and support available in Wales.

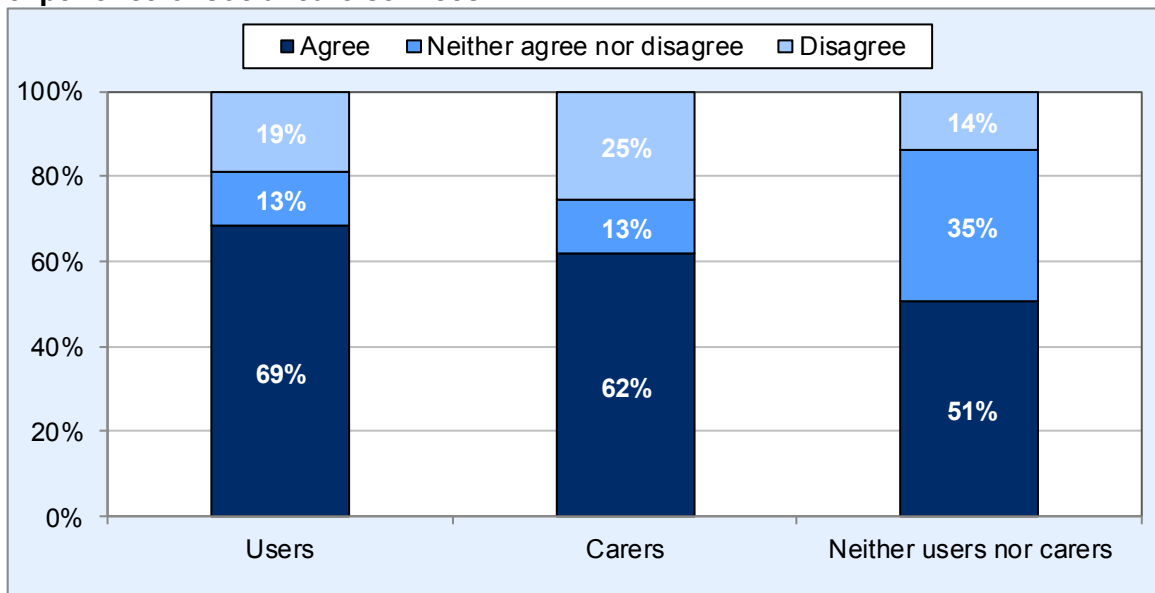
In 2014-15, the National Survey included several questions about social care.<sup>15</sup> The results will provide baseline information on the well-being of people who use social care services, and in due course help to measure the impact of the changes implemented within social care.

All respondents were asked to what extent they agreed or disagreed with the statement ‘good social care services are available in my local area’. This question had a high proportion of people answering ‘don’t know’, with 29% doing so. Of those who gave a valid answer, 52% agreed (16% strongly agreed and 36% tended to agree), 32% neither agreed nor disagreed, and 15% disagreed (10% tended to disagree and 5% strongly disagreed).

Respondents were shown a list of examples of help offered by social care and support services in Wales and were asked whether they had received any help from care and support services in Wales in the last 12 months. 9% said they had.

Chart 12 shows how people responded to this question, by their experience of care and support services, i.e. those who have received help for themselves as ‘users’ or received help as ‘carers’ and those who have not received help - ‘neither users nor carers’.<sup>16</sup>

**Chart 12: Extent of agreement that ‘good social care services are available in the area’, by experience of social care services**



People who were social care users were most likely to agree that good social care services were available in their area (69%), compared with 62% of people who were receiving help as carers and 51% of people who were ‘neither users nor carers’. 13% of ‘users’ and ‘carers’ said they neither agreed nor

<sup>15</sup> The questions were included between July 2014 and April 2015.

<sup>16</sup> ‘Users’ are defined as those who stated that they received help from care and support services for themselves, ‘carers’ are defined as those who stated that they personally provided care for someone else, those who did not state either of these two things were classed as ‘Neither users nor carers’. Note that a respondent can be both a user and a carer.

disagreed that good social care services were available in their local area, compared with 35% of people who were 'neither users nor carers'. This might imply that those who don't have direct contact with social services find it more difficult to give a positive or negative view of the service. This may also explain why such a high proportion of people answered 'don't know'.

People who had received help in the last 12 months, or who personally provided care for someone else, were asked to rate various aspects of the service. 43% rated the people who directly helped, cared for or supported them or helped the person they care for as excellent, 38% as good, and 12% as fair.

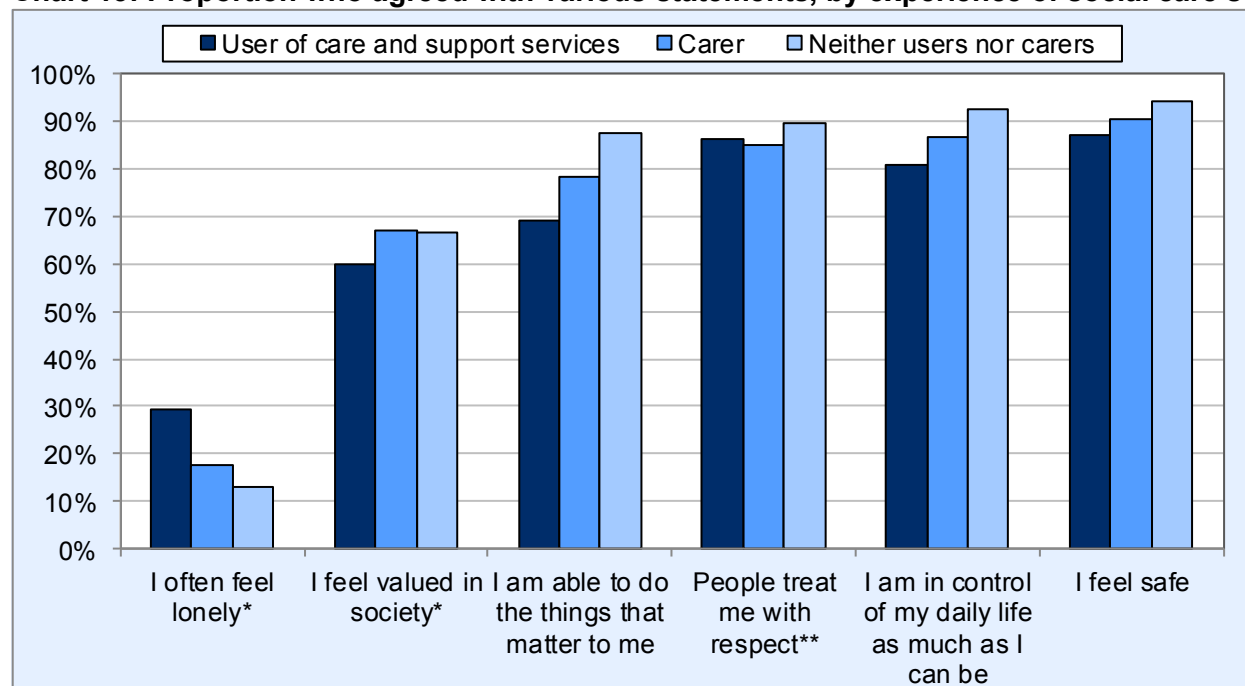
People who received help were asked whether they agreed or disagreed that 'care and support services have helped them to have a better quality of life'. 71% agreed, 13% neither agreed nor disagreed and 16% disagreed.

32% rated the care and support services they received as excellent overall, 39% as good and 19% as fair. The [2013/14 Scottish Health and Care Experience Survey](#) also asked the question 'Overall, how would you rate your help, care or support services'. In that survey, people gave a higher rating, 41% said excellent, 43% said good and 12% said fair.<sup>17</sup>

## Well-being of those who use care and support services

The National Survey asked people to what extent they agreed<sup>18</sup> or disagreed<sup>18</sup> with a series of statements about their life at the moment. Chart 13 shows the proportion who agreed<sup>18</sup> with the various statements by their experiences of social care services.

**Chart 13: Proportion who agreed with various statements, by experience of social care services**



Users of care and social services were the most likely to agree that they often feel lonely (29%, compared with 13% of those who were not users or carers).

For all other statements, people who were 'neither users nor carers' were generally more likely to agree with the statements than 'users' and 'carers'.<sup>19</sup>

<sup>17</sup> While the results are broadly comparable, there are differences between the Scottish Health and Care Experience Survey and the National Survey that should be borne in mind. For example, the Scottish Health and Care Experience Survey is a postal survey, whereas the National Survey for Wales is a face-to-face interview.

<sup>18</sup> Agree is defined as 'strongly agree' or 'tend to agree'.

<sup>19</sup> No significant difference between 'neither users nor carers' and 'carers' or 'users' are marked with \* or \*\* respectively.

## Use of Welsh in health and social care services

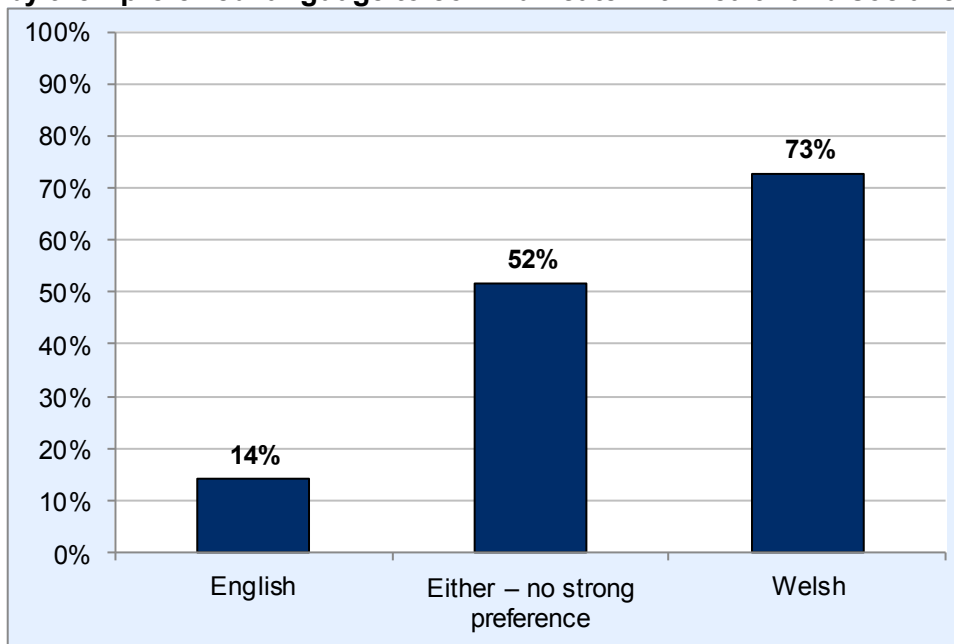
The Welsh Government has developed the programme '[More than just words](#)' to strengthen Welsh language services among frontline health and social services. This is in order to meet the care needs of Welsh speakers and their families or carers. The National Survey asked respondents about the use of the Welsh language in local health and social care services. Respondents were asked to think about services such as GPs, NHS hospitals, social services and all members of staff from doctors through to receptionists when answering these questions.

Welsh speaking respondents were asked if they would prefer to communicate in English or Welsh with health and social care staff, and whether in the last 12 months they had used Welsh to communicate with health or social care staff.

64% of Welsh speakers said they would prefer to communicate in English with health and social care staff, 17% preferred to communicate in Welsh, and 19% had no strong preference. In the last 12 months, 31% had used Welsh to communicate with health and social care staff and 69% had not used Welsh in this way.

Chart 14 shows the proportion of Welsh speakers who had actually used Welsh to communicate with health and social care staff in the last 12 months, by their preferred language used to communicate with health and social care staff.

**Chart 14: Proportion of Welsh speakers who spoke Welsh with health and social care staff, split by their preferred language to communicate with health and social care staff**



Of Welsh speakers who would prefer to communicate in Welsh, 73% had actually used Welsh. 14% of Welsh speakers who preferred to use English had communicated in Welsh with health and social care staff in the last 12 months. Of Welsh speakers who had no strong preference, 52% had actually used Welsh to communicate with health and social care staff.

## Active travel – adults

'Active travel' means walking or cycling to get to a particular destination such as work, the shops, or to visit friends. The Welsh Government's [Active Travel Act 2013](#) became law in November 2014. This legislation makes it a legal requirement for local authorities in Wales to map and plan suitable routes for active travel. They are also required to improve their infrastructure for walking and cycling by ensuring that active travel routes link key sites such as workplaces, hospitals, schools and shopping areas. The Act also requires both the Welsh Government and local authorities to promote walking and cycling as a mode of transport, and to encourage people to rely less on their cars when making short journeys.

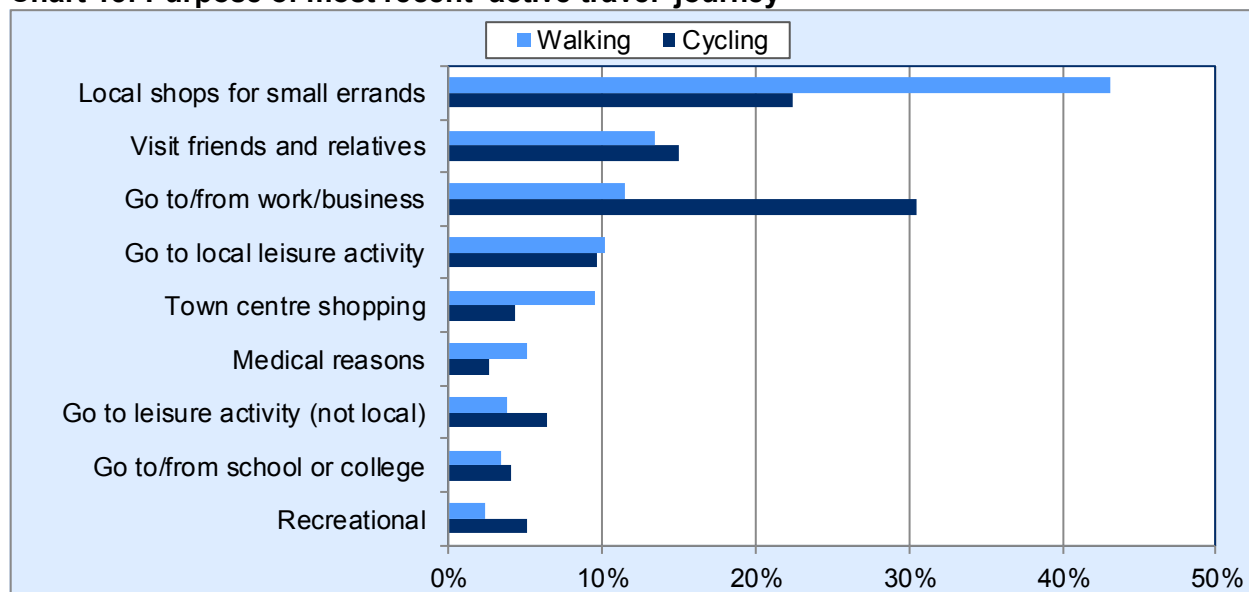
In order to help monitor whether and how the introduction of this law affects people's behaviour, in 2013-14 and 2014-15 the National Survey included a series of questions about people's current active travel activities. These questions explore what types of 'active travel' people do, to which destinations, and how frequently.

Note that where 'walking' or 'cycling' is mentioned below, this refers to walking or cycling to get to a particular destination rather than simply for pleasure or exercise.

### Active travel in past seven days

Respondents were asked what method of active travel they had done in the last seven days. 5% had cycled as a means of transport and 65% had walked for more than five minutes. This group of respondents were then asked what the purpose of their most recent active travel journey was. The most common purposes given for both cycling and walking are shown in Chart 15.

**Chart 15: Purpose of most recent 'active travel' journey** <sup>(a)</sup>



(a) Those who said that they cycled or walked to go the supermarket or take their children to school or other activities are not shown in the chart due to small numbers.

Chart 15 shows that the most common purpose for walking was to get to local shops for small errands, with 43% of walkers gave this as the reason for their most recent active travel journey on foot. This was followed by visiting friends and relatives (13%) and getting to their place of work (11%).

The most common purpose given for cycling was to get to and from a place of work, where 30% of cyclists gave this as the reason for their most recent active travel journey by bike. This was followed by going to local shops for small errands (22%) and visiting friends and relatives (15%).<sup>20</sup>

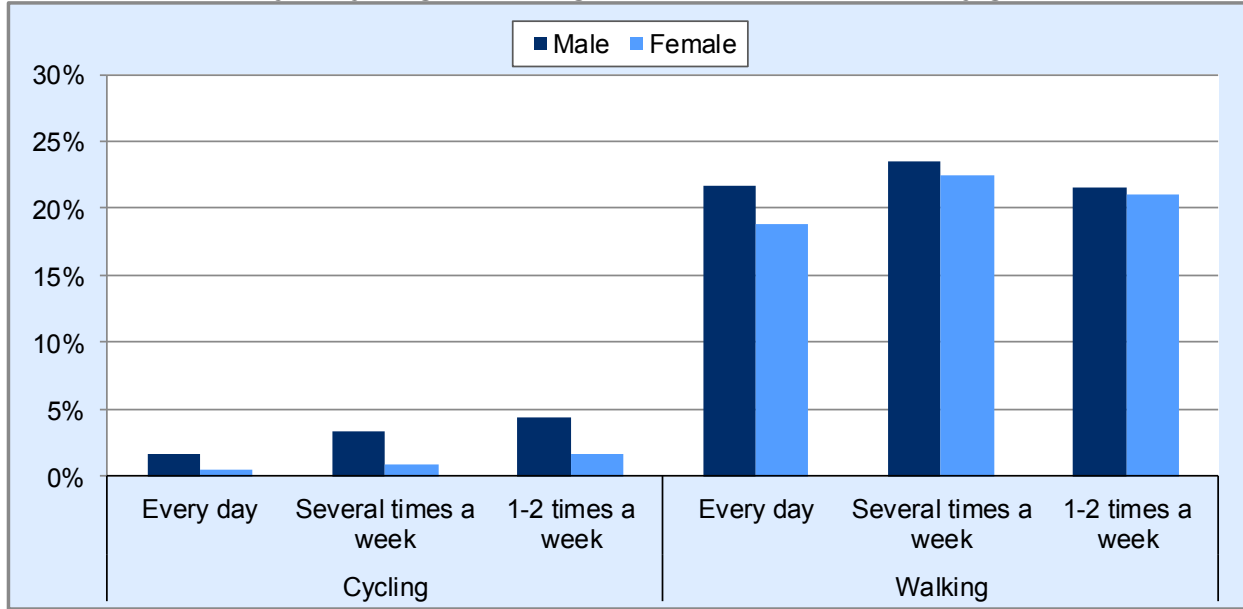
<sup>20</sup> Note that 65% had walked and 5% had cycled. Therefore 11% of walkers walking to work represents a larger number of people than 30% of cyclists cycling to work.



## How often people walk or cycle as a means of transport

Respondents were asked whether they had walked for more than five minutes or cycled to get to a particular destination in the past three months. They were asked to consider journeys where they walked or cycled the whole journey, as well as journeys where they had cycled or walked for part of the journey (for example walking/cycling to a train station). They were also asked how frequently they had done this. Chart 16 shows how frequently both men and women had walked or cycled for part or all of a journey.

**Chart 16: Frequency of cycling or walking as a means of transport, by gender**



Men were more likely than women to have cycled and walked as a means of transport over the previous three months. 9% of men had cycled at least once or twice a week compared with 3% of women (no significant change from 2013-14). 67% of men had walked for more than five minutes at least once or twice a week, compared with 62% of women.

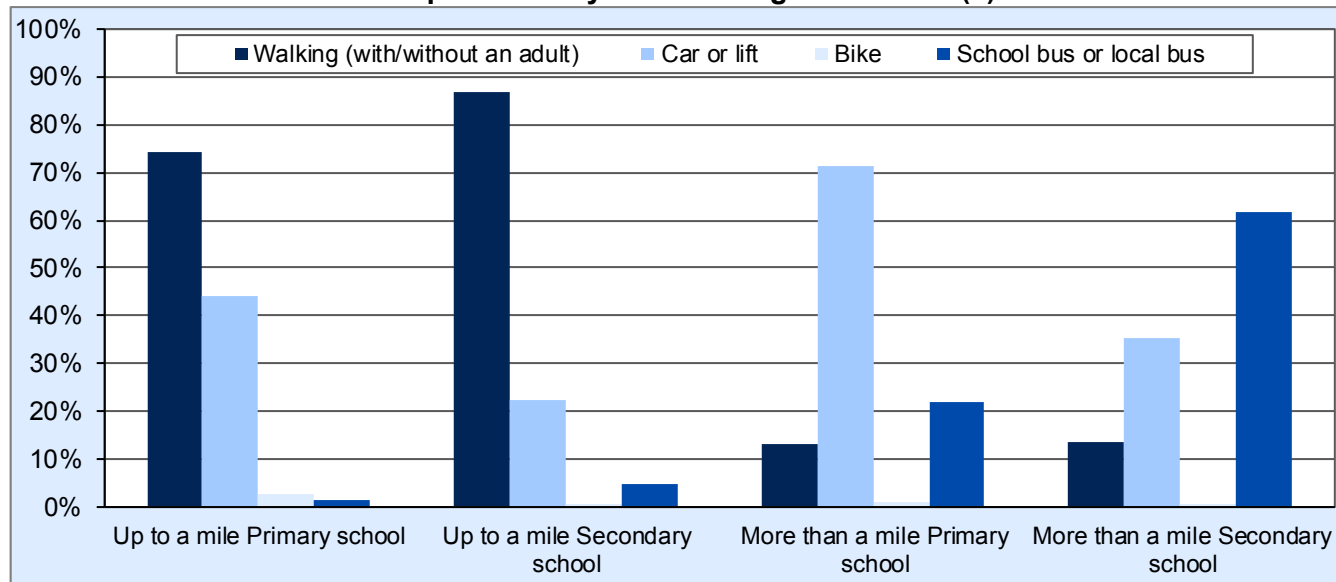
Younger people were more likely than older people to have walked and cycled as a means of transport in the past three months, and they were also more likely to have done this more frequently. People who lived in urban areas were more likely than people who live in rural areas to have done so (68% in urban areas, compared with 54% in rural areas). They were also more likely to have done this more frequently, with 22% of people in urban areas walking every day compared with 16% of people in rural areas.

## Active travel – children going to school

The Welsh Government’s [Active Travel Action Plan](#) aims to increase the proportion of children who walk or cycle to school. The National Survey included questions in both 2013-14 and 2014-15 about how children travel to school. Parents of primary and secondary age children were asked how their child usually travelled to school and how far that journey was.

Chart 17 shows the mode of transport most commonly used to get to school and how this varies by distance travelled.

**Chart 17: Usual mode of transport used by children to get to school (a)**



(a) Respondents were able to select more than one mode of transport, so results do not add to 100%.

Chart 17 shows that over 74% of children at primary schools and 87% of children at secondary schools usually walked to school, when the school was less than a mile away. Children at primary school tended to walk to school with an adult whilst the majority of those walking to a secondary school walked on their own or with other children. Secondary school children tended to travel further, and were more likely to go to school on a bus, than primary school children. 71% of primary school children who lived more than a mile from school tended to be driven to school by car whilst only 35% of secondary school children living this far from school received a lift.

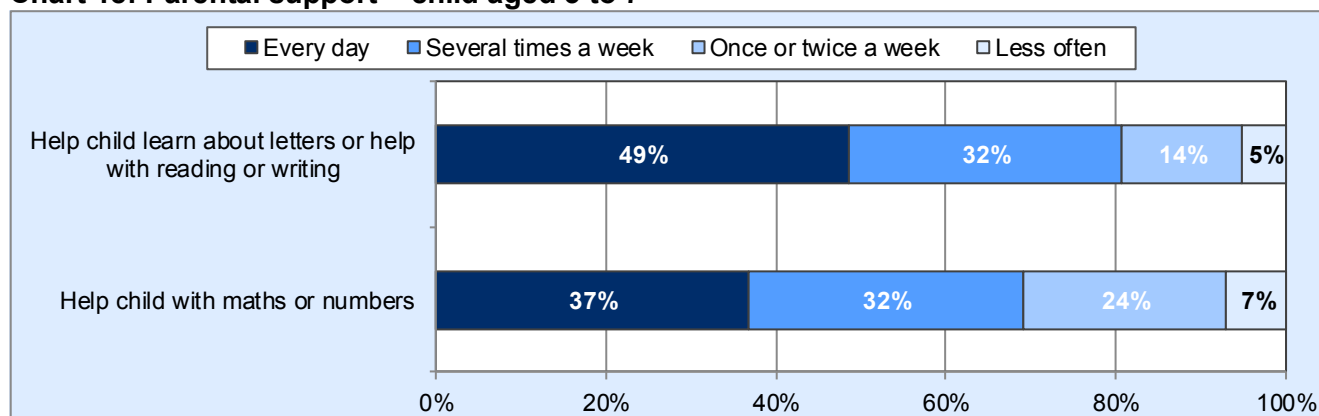
The results followed a similar pattern in 2013-14.

## Literacy and numeracy – parental support

Research has consistently shown that supportive parents and a good home learning environment can help to improve a child’s cognitive development and make a positive difference to achievement at school. One of the key findings from the 2011 [Millennium Cohort Study](#) was that the strongest predictor of cognitive development is parents’ level of qualifications.

In the 2014-15 National Survey, parents of children aged 3 to 7 were asked to think about one child (selected at random if more than one child in this age group) and answer questions about how often they help their child with learning about letters or help with reading or writing, and with maths or numbers. The results are shown in Chart 18.

**Chart 18: Parental support – child aged 3 to 7**

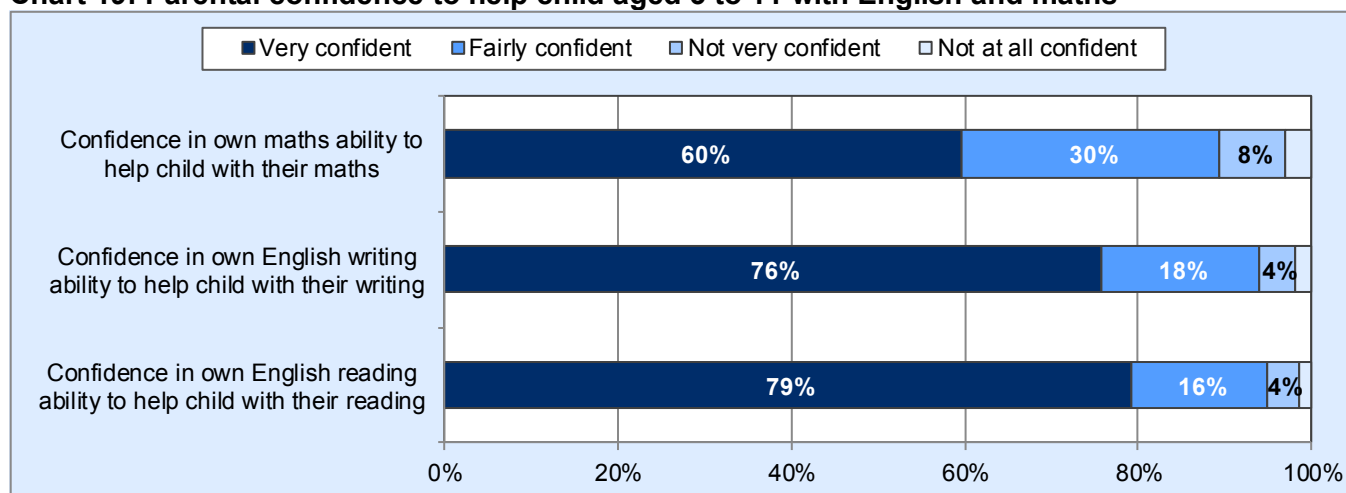


81% of parents helped their child learn about letters or helped with reading and writing at least several times a week; 69% of parents helped their child with maths or numbers this frequently.

It is important to note that the survey only asked the parent randomly selected for interview how much time they spent doing various activities with their child. Information about the time that the other parent or another adult spent doing the same activities with the child was not collected.

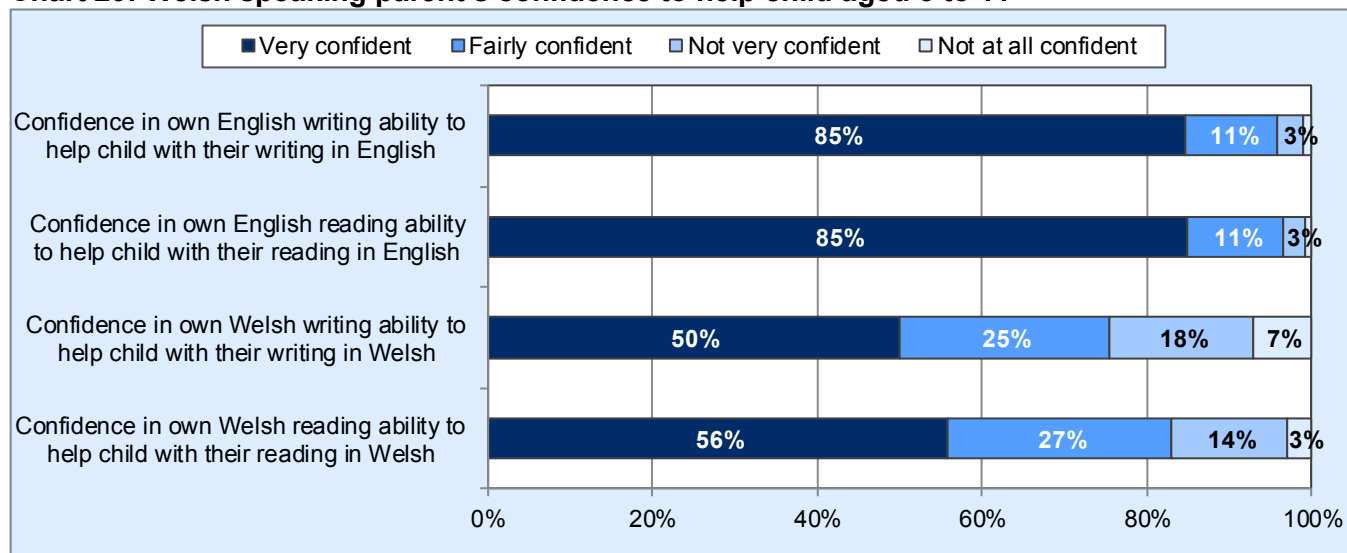
The research report [Review of best practice in parental engagement](#) published in September 2011 found that family literacy and numeracy skills had a strong relationship with a child’s academic outcomes. It also recommended that schools or other agencies needed to improve parental confidence in ways that will benefit their children’s learning. In the National Survey, a set of questions was asked of parents of children aged 3 to 11 (the child was again randomly selected). These questions concentrated on the respondent’s confidence in their own ability to help their child with reading, writing and maths. The results are shown in Chart 19.

**Chart 19: Parental confidence to help child aged 3 to 11 with English and maths**



Over 75% of parents were very confident helping their child read or write in English. In contrast, only 60% were very confident in their ability to help with maths. Interestingly, Chart 20 shows that Welsh speakers were more confident helping their child to write in English (85%) than were parents in general (76% - from Chart 19). However, Chart 20 also shows that the proportion of Welsh speakers who were very confident helping their child to read and write in Welsh was significantly lower than the proportion of the same parents who were very confident helping their child read or write in English.

**Chart 20: Welsh speaking parent's confidence to help child aged 3 to 11**



## Views on the education system in Wales

The Welsh Government is keen to find out views on the education system in Wales from a cross-section of the population, not only those who are parents.

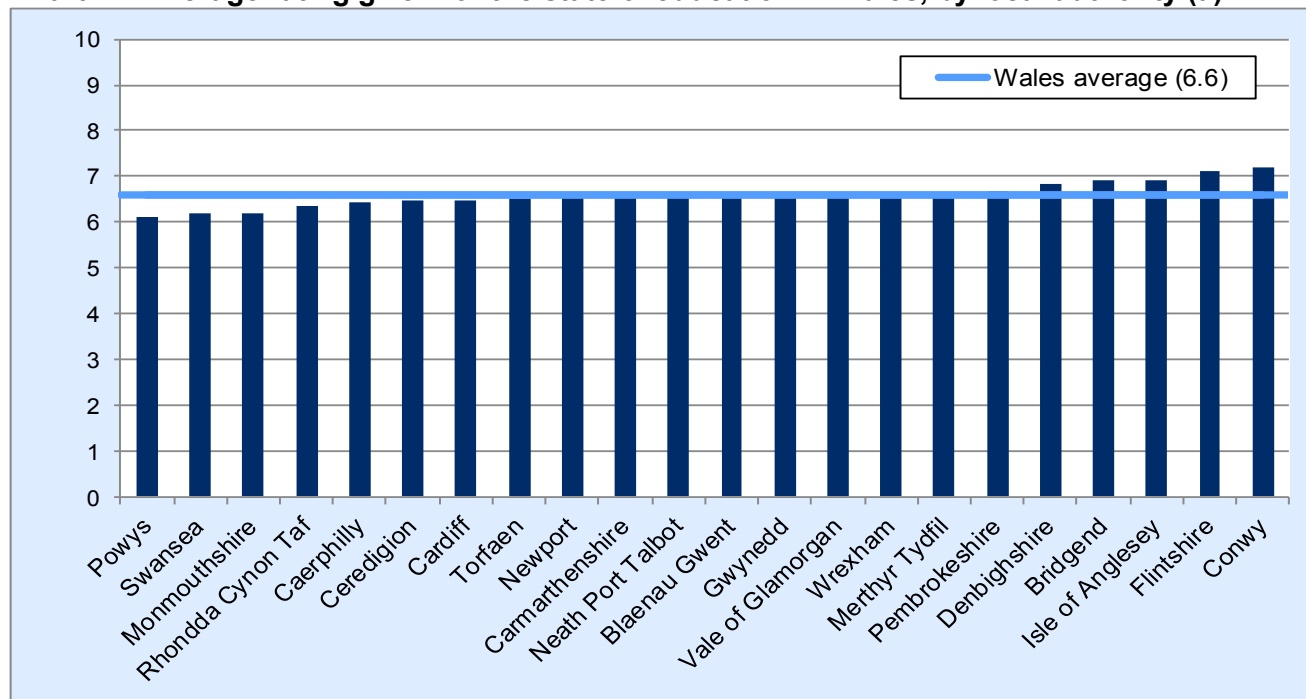
The National Survey asked people what they thought about the state of education in Wales. The answer was on a scale of nought to ten, where nought is 'extremely bad' and ten is 'extremely good'. The average response for the National Survey was 6.6. The proportion of people answering 'Don't know' to this question was 12% (18% for people in households with no children under 19; 2% for households with children under 19). As for all other questions, 'Don't know' responses have been excluded from the analysis.

Since devolution, education policy in the four constituent countries of the UK has diverged. For example, in England reforms have been introduced based on diversity of school types and parental choice; in Wales (and Scotland) there remains a commitment to community-based comprehensive schools. It is therefore interesting to look at the National Survey results in a wider context.

The same question was asked in the [European Social Survey](#) in 2012 where the UK national average was 5.9, and the average rating across European countries was 5.0. Please note that for detailed comparisons with other European countries, the European Social Survey results from 2012 should be compared with the National Survey results from 2012-13. These comparisons are available in this [separate report](#). Figures from the European Social Survey 2014, which will be more comparable with the 2014-15 National Survey, will be available in October 2015.

Local authorities in Wales are responsible for their own education budget. They have substantial scope to decide how the money can be used to meet local needs and priorities. Overall satisfaction with education by local authority area is shown in Chart 21.

**Chart 21: Average rating given for the state of education in Wales, by local authority (a)**



(a) Answers were given on a scale of 0 (extremely bad) to 10 (extremely good).

People in Conwy gave the highest average rating for the state of education (7.2), while people in Powys gave the lowest average rating (6.1). In each of the last three years there has been a significant difference between the local authority with the lowest average rating and the one with the highest. However the sequence of local authorities, by rating, has varied over the three years.

## Internet access and use

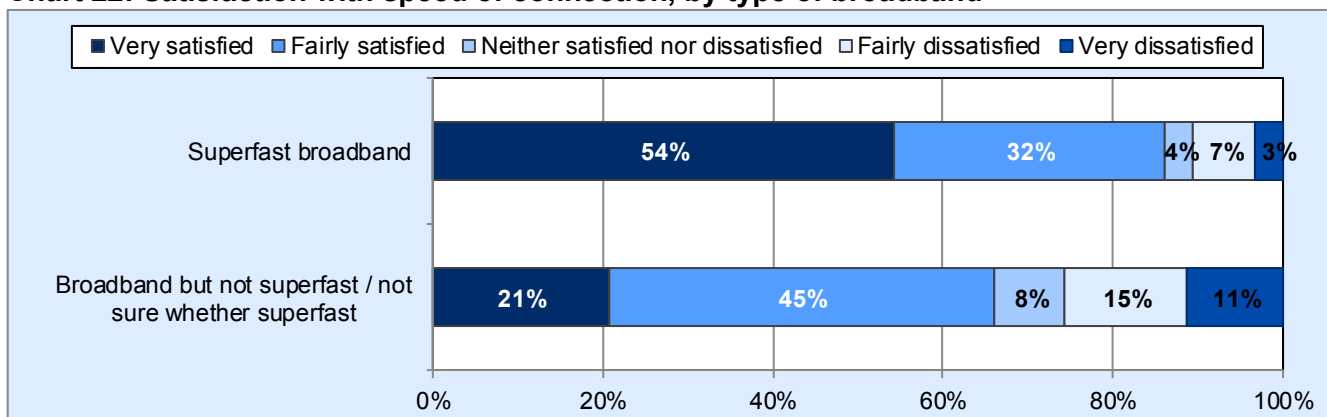
The Welsh Government aims both to reduce the overall number of people who do not use the internet and to target support at particular sub-groups of the population, to ensure that people take full advantage of the economic and social benefits offered by the internet. Identifying the number, proportion and types of people who do not use the internet helps the Welsh Government to monitor its progress against these objectives. Evidence on internet access and use has informed Welsh Government policies and initiatives on digital inclusion: see [Digital inclusion](#) and [Digital Wales](#).<sup>21</sup> Further research, providing additional context, was carried out by re-contacting some of the non-internet users identified in the 2013-14 National Survey. The report can be found [here](#).

In the National Survey 2014-15, respondents were asked where they accessed the internet, which devices they used and what activities they used the internet for. The survey found that 78% of households had access to the internet; up from 75% in 2013-14 and 73% in 2012-13. Tables showing the results from questions on accessing the internet and devices used will be published shortly and can be found on [StatsWales](#) together with the results from previous years.

The 2014 Ofcom [Communications Market report](#) estimated that 80% of households in Wales had access to the internet in Jan – March 2014, compared with 82% for the UK as a whole. These findings suggest Wales has narrowed the gap with the UK average: comparable figures for Jan – March 2013 were 75% of households with internet access in Wales, 80% in the UK. Whilst these Ofcom findings use a different methodology and time frame from the National Survey they illustrate the continuing growth in internet access.

Some new internet questions were introduced in the 2014-15 National Survey. People were asked whether they connected to the internet through a broadband connection. 21% of households with access to the internet said they had superfast broadband, 77% said they had broadband but not superfast (or they were unsure if it was superfast) and 2% said they did not use broadband to connect to the internet at home. Broadband users were also asked how satisfied they were with the speed of connection; the results are shown in Chart 22.

**Chart 22: Satisfaction with speed of connection, by type of broadband**

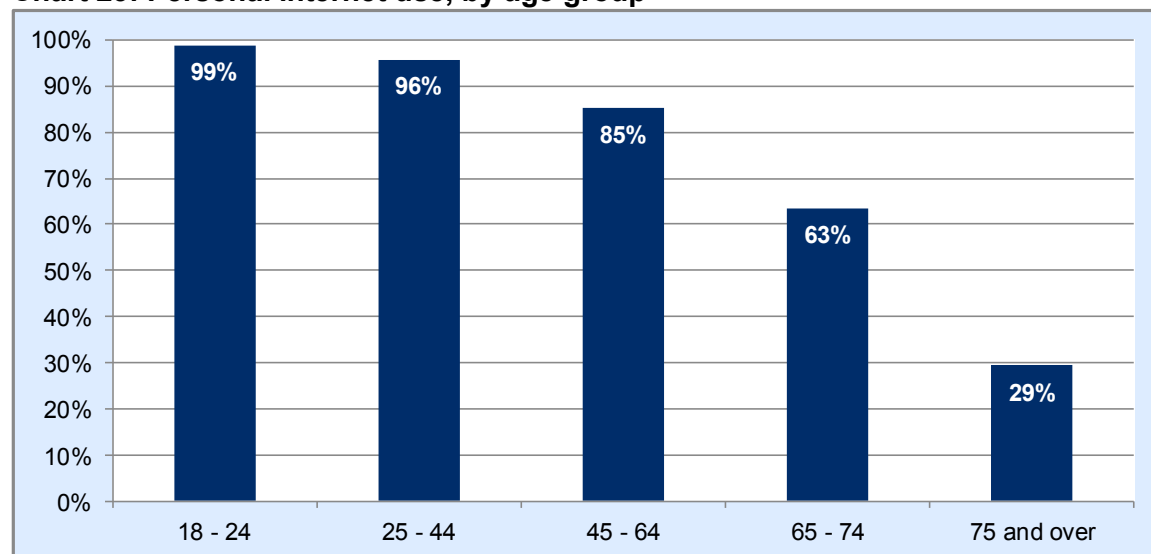


86% of respondents with superfast broadband were satisfied with the speed of connection whilst 10% were dissatisfied. This compares with 66% of respondents that had broadband but not superfast (or who were unsure whether it was superfast) that were satisfied with the speed of connection, and 26% that were dissatisfied.

<sup>21</sup> Welsh Government targets are based on people aged 18+, and so in this section where the term “people” is used it refers to people aged over 18 (unless otherwise indicated).

People were asked whether they personally used the internet at home, work or elsewhere. 81% of people said they used the internet; up from 79% in 2013-14 and 76% in 2012-13. Usage varied by age, as shown in Chart 23. 99% of people aged 18 to 24 used the internet compared with 29% of people aged 75 or over.

**Chart 23: Personal internet use, by age group**



People were also asked about the devices that people used to access the internet. The three devices most commonly used to access the internet were: a laptop at home or in work (66%); a mobile phone or smartphone (60%); and a desktop computer (38%). However, even since 2013-14 there has been a marked change in the pattern of devices used to access the internet. The proportion using a desktop computer has continued to fall year on year - reducing from 52% in 2012-13 to 38% in 2014-15.

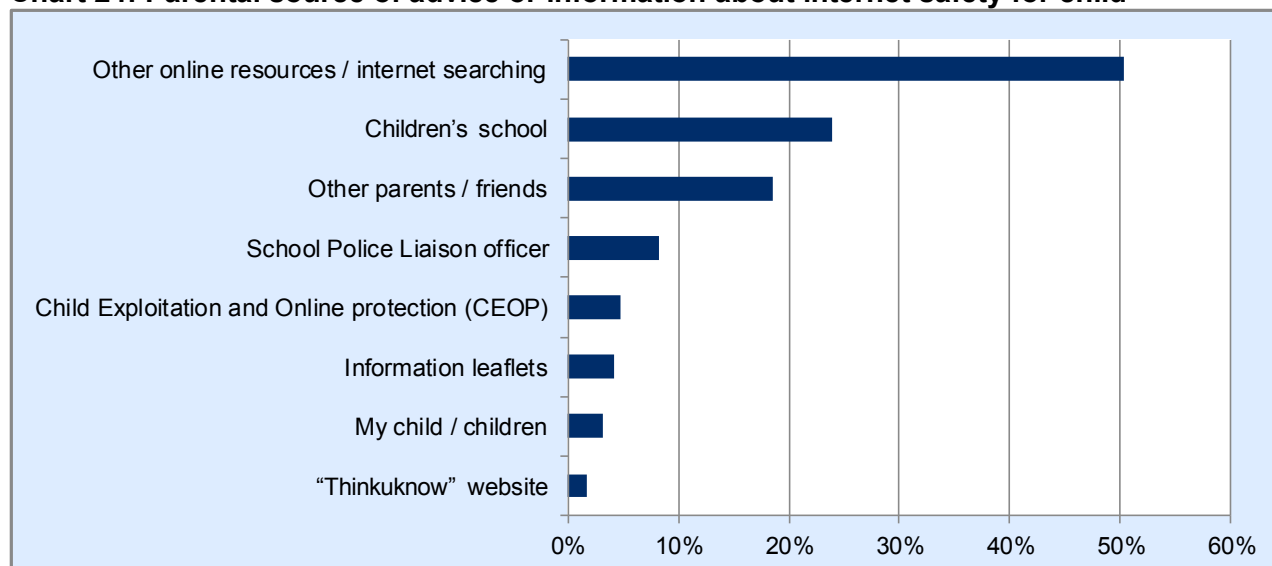
## e-Safety

The Welsh Government is committed to raising awareness of child internet safety (“e-Safety”) as part of the [Learning in a Digital Wales Programme](#). With the rapid growth of devices that can access the internet, children and young people are learning new skills and independently increasing their knowledge. However, they may also be exposed to potential risks online, and some parents may feel unable to deal with these risks due to their own lack of experience and confidence in using the latest technology.

The 2011 [Millennium Cohort Study](#) (MCS) found that three quarters of children aged 11 had their own mobile phone. Most 11 year olds also had access to a computer and the internet, and the majority had a TV in their bedroom. The MCS found that most parents set rules about the content their children could access but there is little Wales-specific research available and so it was decided to add some e-Safety questions to the National Survey for 2014-15.

Chart 24 shows the places parents go to get advice or information about internet safety for their child. 50% of the parents asked said they would find advice online whilst 24% said they would ask their child’s school for advice or information. Other parents and friends was another commonly stated source (19%). Fewer than 6% of parents used leaflets or the ‘[Thinkuknow](#)’ website for information.

**Chart 24: Parental source of advice or information about internet safety for child**



(b) Respondents were able to select more than one source, so results do not add to 100%

Parents of children aged 7 to 15 were asked whether they used parental control filters, such as ‘Net Nanny’ or other filters provided by their internet service provider. 56% said that the household did use such filters, 32% had heard about them but didn’t use them, and 12% had never heard of them.

Parents were also asked whether they had told their children how to stay safe online. 75% had told their child not to visit some websites; 91% not to give out personal information; 84% not to meet someone they had only met online; and 89% not to talk to strangers online.

Parents with a child aged 7 to 15 were asked what device their child used to access the internet, where they access the internet, and the reasons for using the internet. The results can be found in StatsWales tables [here](#).



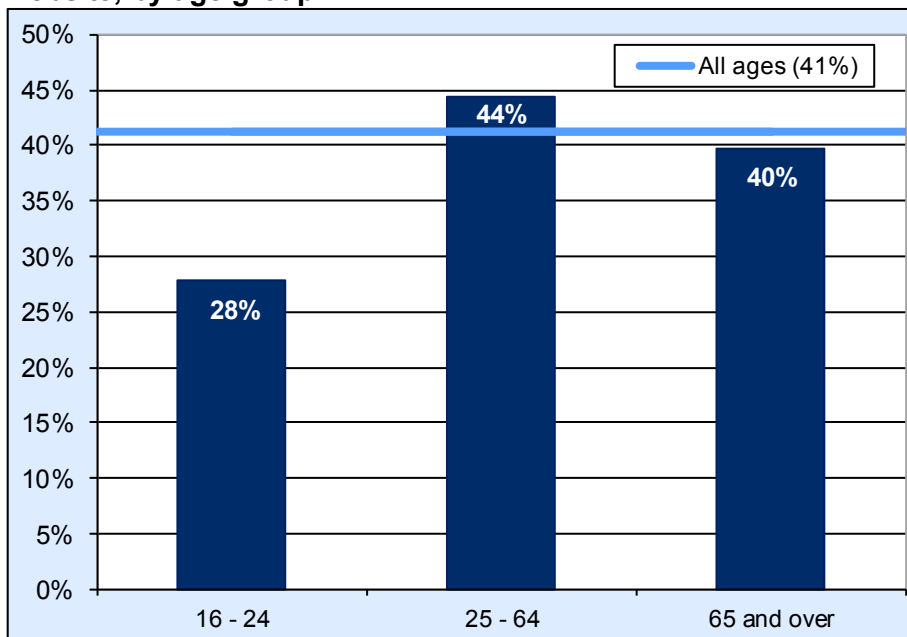
## Public service websites

One of the key actions in the Welsh Government's [Programme for Government](#) is to support continuous improvement in Welsh public services. One method is by delivering services online and encouraging and supporting other public sector organisations in Wales to do the same. A set of questions were added to the National Survey in 2014-15 as a means of measuring the success of public engagement via these sites.

People who used the internet at least once a week were shown a list of Welsh public service or Welsh Government websites. They were asked if they had visited any of them for personal purposes in the previous twelve months and whether they were satisfied with their most recent visit. 62% said that they had visited one of these websites, and of those people 90% were satisfied with their experience.

People were also asked whether they had completed an online transaction when visiting a local public services website. A transaction, for the purposes of this question, includes actions such as: booking appointments at a GP surgery or leisure centre; reporting a problem such as potholes, graffiti; applying for local benefits - e.g. free school meals, council tax discounts; paying bills; and other services such as renewing library books. 41% had completed an online transaction. Chart 25 shows the results split by different age groups.

**Chart 25: Proportion who have completed an online transaction on a local public service website, by age group**



People aged 25 to 64, who visited public service websites, were the group most likely to carry out a transaction online (44%). The youngest age group (16 to 24) had the lowest proportion (28%) carrying out a transaction, but this may be because many in this age group are not householders. 40% of those aged 65 and over had carried out a transaction when visiting a public service website in the previous 12 months.

## Sense of community

The Welsh Government's [Getting on together - a Community Cohesion Strategy for Wales](#), published in 2009, set out its priorities for improving community cohesion. 'Community cohesion' is used to mean people living alongside each other with mutual understanding and respect, where every person has the equal chance to participate and has equal access to services.

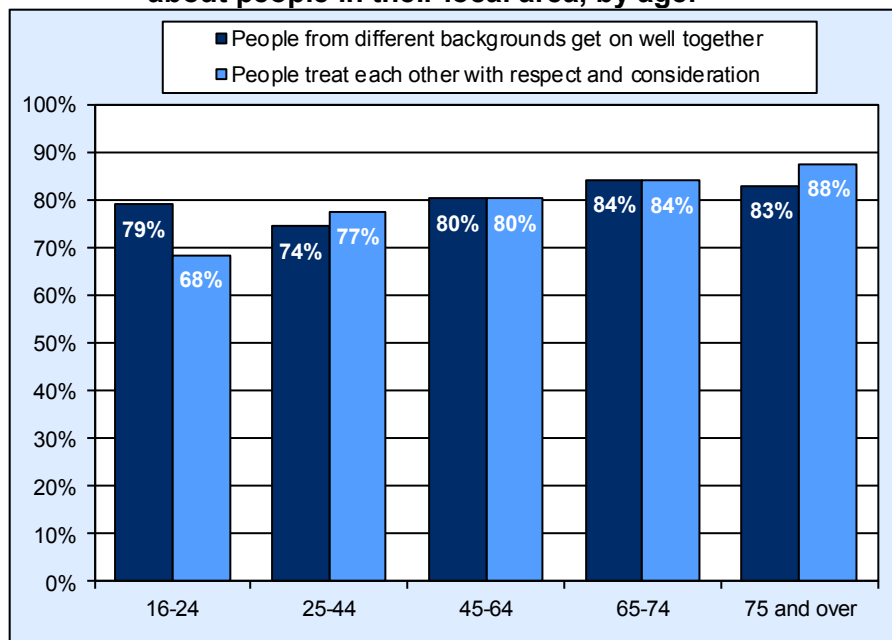
The Living in Wales Survey was used to provide baseline evidence for the development of this strategy. Questions about people's relationships with others in their local area were included in the National Survey so that the impact of projects designed to increase community cohesion as well as the [Community Cohesion National Delivery Plan](#) could be monitored.

The National Survey asked respondents whether, in their local area:

- people from different backgrounds get on well together; and
- people treat each other with respect and consideration.

79% agreed that in their local area people from different backgrounds get on well together. 79% agreed that people in their local area treat each other with respect and consideration.<sup>22</sup> Older people were more likely to have a positive view about people in their local area than younger people, as shown in Chart 26.

**Chart 26: Proportion of people who agreed with statements about people in their local area, by age.**



- 88% of people aged 75 or over said that people in their local area treated each other with respect and consideration, compared with 68% of people aged 16 to 24.

- 84% of those aged 65 to 74 thought that their local area was a place where people from different backgrounds get on well together, compared with 74% of people aged 25 to 44.

Respondents were also asked whether they felt like they belonged to their local area. 82% felt they did, less than in 2013-14 when 85% felt they belonged to their area.

The [Community Life Survey, 2013-14](#) included a range of questions about community cohesion. It found that for people in England:

- 85% felt people from different backgrounds get on well together in their neighbourhood;
- 60% agreed that people pull together to improve their neighbourhood.
- 70% had a strong sense of belonging to their neighbourhood, a decrease compared with 2012-13 (78%) and all other years since 2005.

Most of the questions on community cohesion within the National Survey are not directly comparable with those included in the Community Life Survey, due to differences in wording of the questions and answer options, but the Community Life results do provide some useful context.

<sup>22</sup> 'Agree' is defined as those who said 'strongly agree' or 'tend to agree'.

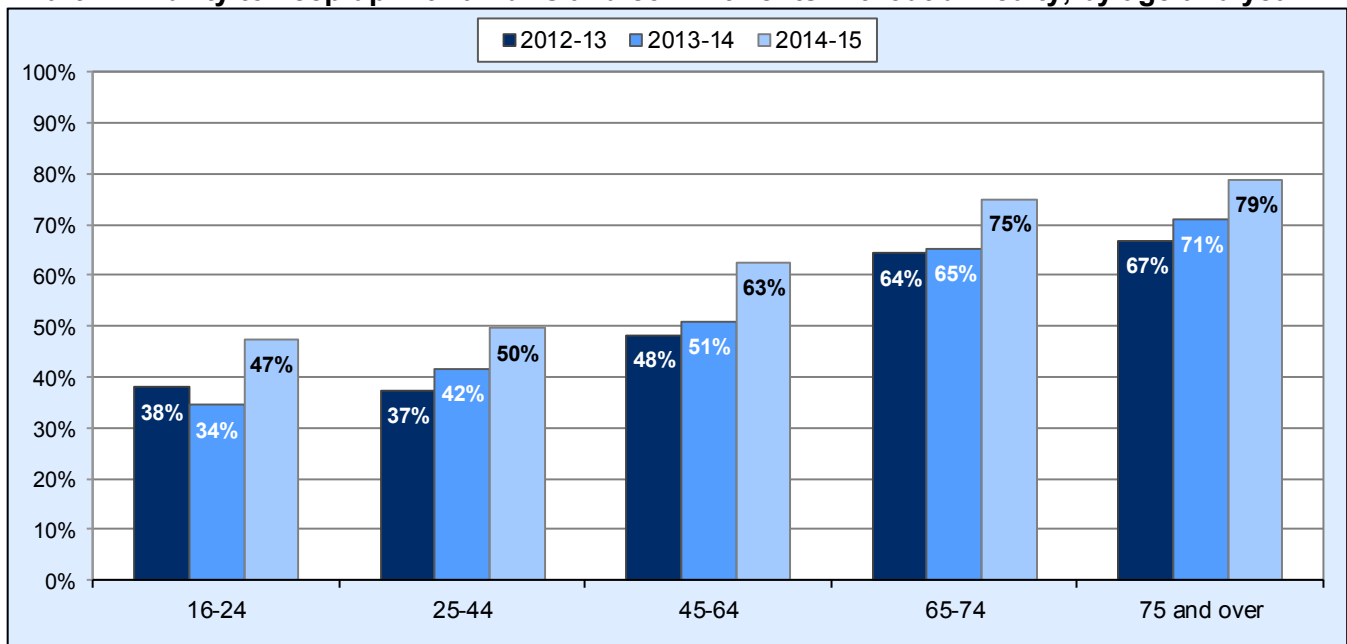
## Personal finances

The aim of the Welsh Government's [Financial Inclusion Strategy for Wales](#) is to make financial services (e.g. benefits and debt advice, basic financial education, bank accounts and loans) available at an affordable cost to disadvantaged and low income people. The Welsh Government also recently published a revised [Child Poverty Strategy for Wales](#) with a new objective to support households to increase their household income by providing access to debt and financial advice. They are keen to understand the extent of any under-provision or lack of take-up of available services; and to know what kinds of people are affected, to help ensure all people in Wales have access to the services they need.

The National Survey included a question on whether people had any difficulties in paying bills and repaying loans. 60% of people said they had no difficulties keeping up with their bills and financial commitments. 25% said it was a struggle from time to time, 8% said it was constant struggle, and 2% said they were falling behind with some bills and credit commitments. 1% said they had real financial problems, having fallen behind with many bills, and 3% said they didn't have any bills.

There has been a marked rise in the proportion of people keeping up with their bills. In 2012-13 and 2013-14, a lower proportion of people (48% and 50% respectively, compared with 60% in 2014-15) were able to keep up with their bills without difficulty. Chart 27 shows how responses to this question have changed since 2012-13, by age group.

**Chart 27: Ability to keep up with all bills and commitments without difficulty, by age and year**



For all age groups, a higher percentage of people were able to keep up with their bills without difficulty than in 2012-13 and 2013-14. As in both previous years, older people were more likely than younger people to be able to keep up with their bills and credit commitments without difficulties. 79% of people aged 75 or over were able to keep up with their bills without difficulty, compared with 47% of people aged under 24.

In 2014-15, 4% of people said they had used the services of organisations that provide advice and support on debt problems in the last 12 months. 6% of those aged 25 to 44 had used the services of a debt support organisation in the last year, compared with just 1% of those aged 75 and over.

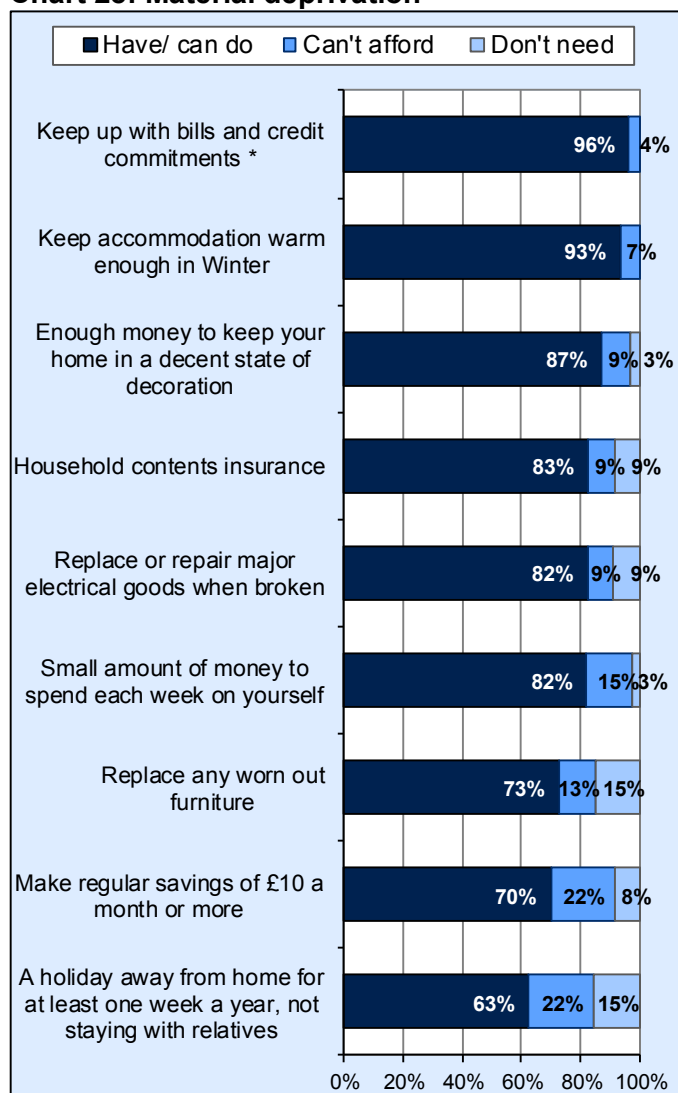
## Material deprivation (section revised 14 Sep 2015)

The Welsh Government's [Child Poverty Strategy](#) and [Tackling Poverty Action Plan](#) provide the framework for improving the outcomes of low income households in Wales. They aim to reduce poverty, especially persistent poverty amongst some of our poorest people and communities, and also to reduce the likelihood that people will become poor.

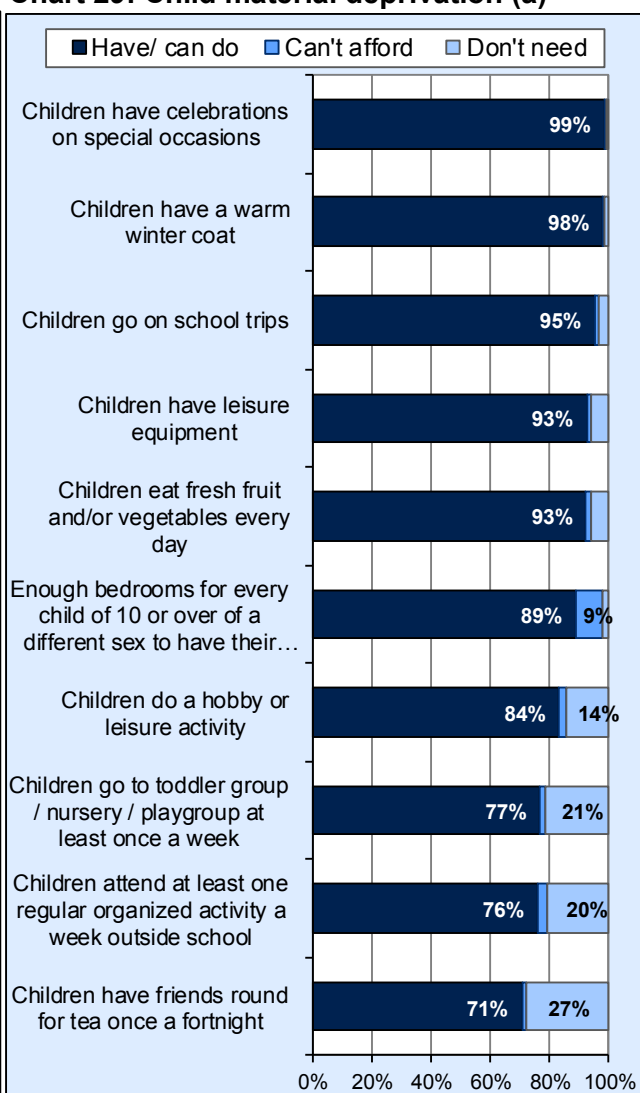
One way of measuring poverty is through asking questions on material deprivation (that is, whether a household is able to afford things like keeping the house warm enough, make regular savings, or have a holiday once a year). Material deprivation questions are designed to capture the consequences of long-term poverty on households, rather than short-term financial strain.

In 2014-15, the National Survey included a series of questions taken from the [Family Resources Survey](#)<sup>23</sup> on the material deprivation of households and of children. These questions were asked primarily to allow us to cross-analyse other topics on the survey by whether the respondent's household is experiencing material deprivation, and so to understand better the circumstances of materially deprived people in Wales. The questions that were asked in the National Survey on material deprivation and child material deprivation and their results are set out in the charts below.

**Chart 28: Material deprivation**



**Chart 29: Child material deprivation (a)**



\* Keeping up with all bills ' without any difficulties', 'but it is a struggle from time to time' and 'it is a constant struggle' grouped together  
(a) These questions were only asked of parents who had children aged 16 or younger.

<sup>23</sup> The [Family Resources Survey](#) is a UK wide survey which collects detailed information on income and benefits, savings and investments, occupation and employment, pension participation, disability, housing tenure and carers.

As can be seen in both charts, most people can afford most of the items on the list. The item that people were least likely to have was a holiday away from home once a year for at least a week, not staying with relatives. 63% had a holiday, but 22% couldn't afford this and 15% said they didn't need or want a holiday. Those who didn't have a holiday 'not staying with relatives', were subsequently asked whether they had a holiday 'staying with relatives', 20% did, 31% said they couldn't afford this either and 49% said they didn't need or want a holiday.

In chart 29, we see that for most of the listed items for children 2% or less stated that they couldn't afford them. 4% said they couldn't afford for their children to attend at least one regular organised activity a week outside school and 9% did not have enough bedrooms for every child of 10 or over of a different sex to have their own bedroom. For some items, (e.g. having friends round for tea, attending a regular organised activity and going to toddler group / nursery / playgroup) a greater proportion of people said that their child did not need these, which could be attributed to the ages of the children concerned.

Whilst the individual results shown on charts 28 and 29 are of interest in themselves, the main purpose of asking this set of questions is to look at all of these items together, in order to define those who are experiencing material deprivation.<sup>24</sup> This provides a valuable way to analyse other topics on the survey (e.g. well-being or experience of public services) by whether the respondent is from a deprived or a non-deprived household.

Although the National Survey results provide more detail than was previously available for Wales, the [Family Resources Survey](#)<sup>25</sup> remains the key source of information on material deprivation in the UK.

In the National Survey 16%<sup>26</sup> of people in Wales were classed as being materially deprived<sup>27</sup> and 9% of parents are classed as having materially deprived children.<sup>28</sup> The [Family Resources Survey](#) does not currently publish an overall material deprivation score for adults, but found in 2011-14, that 17% of children in Wales were in material deprivation and low income. This was higher than the equivalent figures for England, Scotland and Northern Ireland (13%, 11% and 11% respectively)<sup>25</sup>.

In the National Survey, 41% of people who live in social housing were materially deprived. This compares with 27% of people in private rented accommodation and 8% of owner-occupiers. People in their 30s were the age group that were most likely to be materially deprived. 23% of people aged 30 to 39 were materially deprived, compared with 6% of people aged 70 or over. People with higher levels of qualifications<sup>29</sup> were less likely to be materially deprived (8%) when compared with people who did not have any qualifications (24%). 37% of people who live in a household where no-one of working age<sup>30</sup> was working were materially deprived, compared with 11% who live in a household where everyone of working age<sup>30</sup> worked.

People in urban areas were more likely to be materially deprived than those in rural areas: 17% of people in urban areas were classed as being materially deprived, compared with 12% in rural areas. 7% of

---

<sup>24</sup> The material deprivation score is calculated so that a person who can afford everything listed in charts 28 and 29 have a score of 0 and a person who wants but doesn't have these items has a score of 100. A higher score is given to households lacking those items that most households already have. Those with a score of 25 or more are classed as 'materially deprived'. For more detail on how this is calculated, please contact the [National Survey team](#).

<sup>25</sup> The Family Resources Survey includes similar questions to the National Survey but also uses 'income' (which is not collected in the National Survey) as to calculate its material deprivation score. Due to this difference and the topics covered in this survey, (i.e. its increased focus on income and affordability) it is not directly comparable with the National Survey, however the results follow a similar pattern.

<sup>26</sup> Revision: This percentage, and all other percentages quoted from here to the end of the material deprivation chapter have been revised, due to errors found in the original method used to derive material deprivation.

<sup>27</sup> This is calculated by using a score that is derived by using the variables shown in Chart 28

<sup>28</sup> This is calculated using a score that is derived by using the variables shown in Chart 28 and 29.

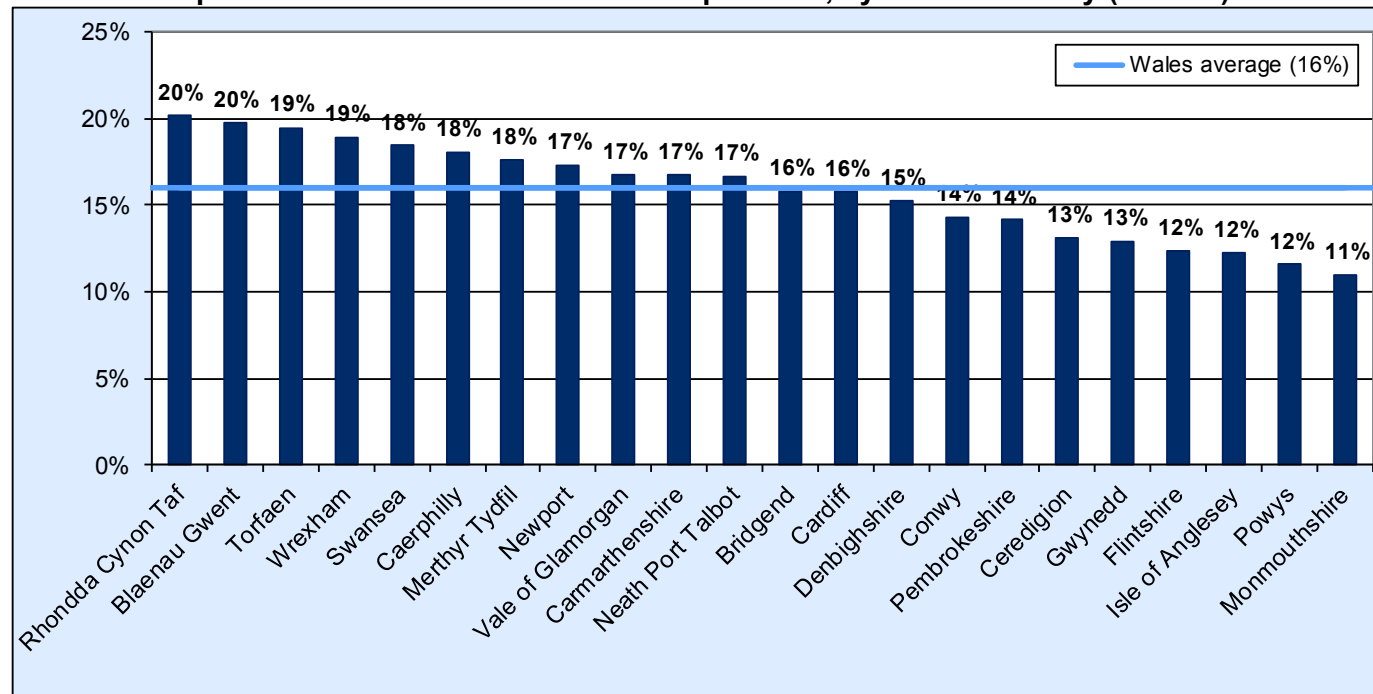
<sup>29</sup> See [terms and definitions](#) for definition of qualification levels

<sup>30</sup> Working age is defined as those aged 16 to 65, excluding those aged 16-19 who are in full-time education

people living in the least deprived areas of Wales were classed as materially deprived, compared with 29% of people in the most deprived areas of Wales.<sup>31</sup>

The proportion of people who are materially deprived varies by local authority; from 11% in Monmouthshire to 20% in Rhondda Cynon Tâf. This is shown in Chart 30<sup>32</sup>.

**Chart 30: Proportion of households in material deprivation, by Local Authority (revised)**



Initial analysis shows that, compared with people who are not in material deprivation, people in material deprivation are less likely to: be healthy; be satisfied with their lives; feel in control of their daily lives; feel treated with respect; feel safe or feel valued in society. They were also more likely to feel lonely and anxious. More detailed analysis of these results will be carried out and published later in the year.

Similar patterns were observed for the material deprivation of children. Tables presenting survey results by material deprivation and child material deprivation will be published shortly to accompany this release and can be found on [StatsWales](https://stats.wales.gov.uk/).

<sup>31</sup> See [terms and definitions](#) for a definition of most and least deprived areas

<sup>32</sup> Revision: This chart has been revised, due to errors found in the method used to derive material deprivation.

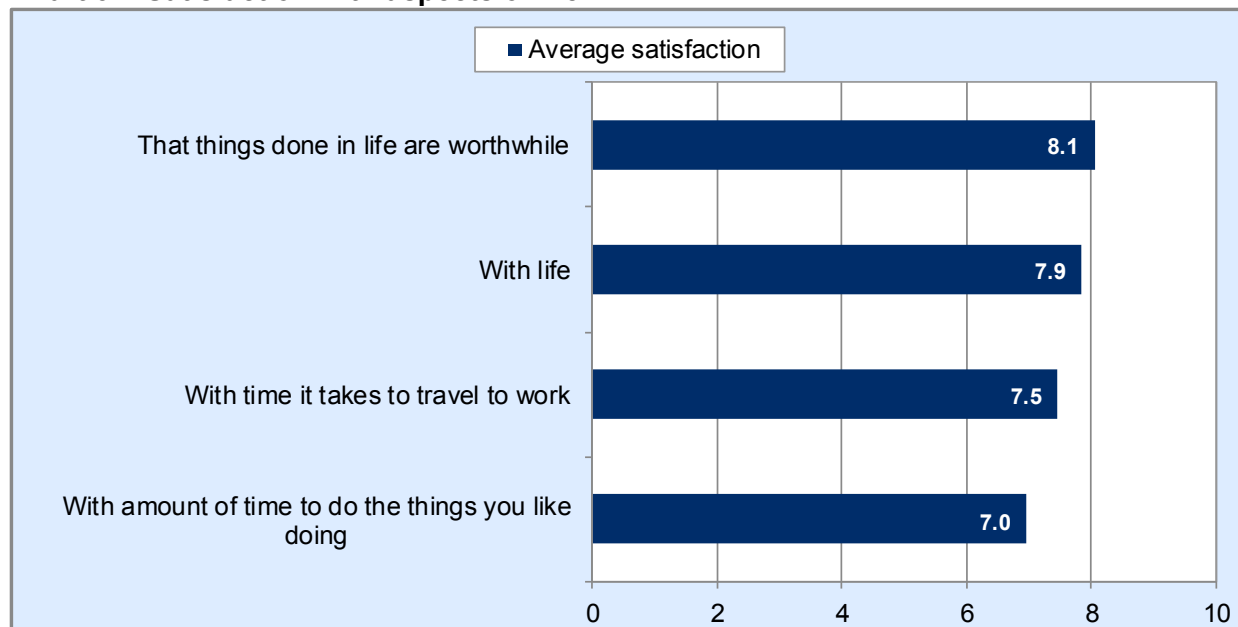
## Well-being

The [Programme for Government](#) sets out the Welsh Government's aim to improve the long-term well-being of people in Wales. Individual well-being is a core component of this picture and includes feelings of happiness and other measures of subjective well-being, such as feeling that one's activities are worthwhile. Other aspects of well-being can be measured more objectively, such as life expectancy and educational achievements. Further information on these measures and results from other sources can be found on the [Office for National Statistics \(ONS\) site](#).

The National Survey asked people to rate various aspects of their lives on a scale of 0 (not at all satisfied) to 10 (completely satisfied). The average score given for satisfaction with life was 7.9. Young people aged 16 to 24 were the age group most satisfied with their lives, giving an average rating of 8.1. Those aged 45 to 64 were least satisfied, giving an average rating of 7.7. Both men and women had an average satisfaction with life of 7.9. Chart 31 also shows the average scores for satisfaction with other aspects of life; overall people gave a satisfaction score of 8.1 for 'things done in life are worthwhile', a score of 7.5 with 'the time it takes to travel to and from work' and 7.0 for the 'amount of time to do the things you like doing'.

ONS asked the same question in its bulletin [Personal well-being in the UK, 2013/14](#) based on results from the Annual Population Survey (APS) and found that the average life satisfaction scores for Wales and for the UK as a whole were both 7.5. [The European Quality of Life Survey](#) (2012) took place between September 2011 and February 2012 across Europe. It included some similar questions on subjective well-being and found that the UK average for life satisfaction was 7.3, and the European average was 7.1. Due to differences in methodology and context the results from these two surveys are not directly comparable with the National Survey results; but, looking at all the results together enables a comparison of Wales' level of personal well-being in relation to the UK and the rest of Europe.

**Chart 31: Satisfaction with aspects of life**



(a) Answers were given on a scale of 0 (not at all satisfied) to 10 (completely satisfied).

The National Survey also included a series of questions to assess people's mental well-being. For example, it asked how happy they had felt the previous day – where nought is 'not at all happy' and 10 is 'completely happy'. The average level of happiness was 7.7. A score of 7.4 out of 10, for both Wales and for the UK as a whole, was reported from the APS results (see above). In a similar way, the National Survey asked people how anxious they had felt the previous day – where nought is 'not at all anxious' and 10 is 'completely anxious'. The National Survey results suggest that, in general, the people of Wales

have a fairly low level of anxiety with an average rating of 2.5. In 2013-14 the APS results for levels of anxiety were 2.9 for the UK and 3.0 for Wales. As previously discussed the two surveys differ in methodology but the results from one provide context for the other.

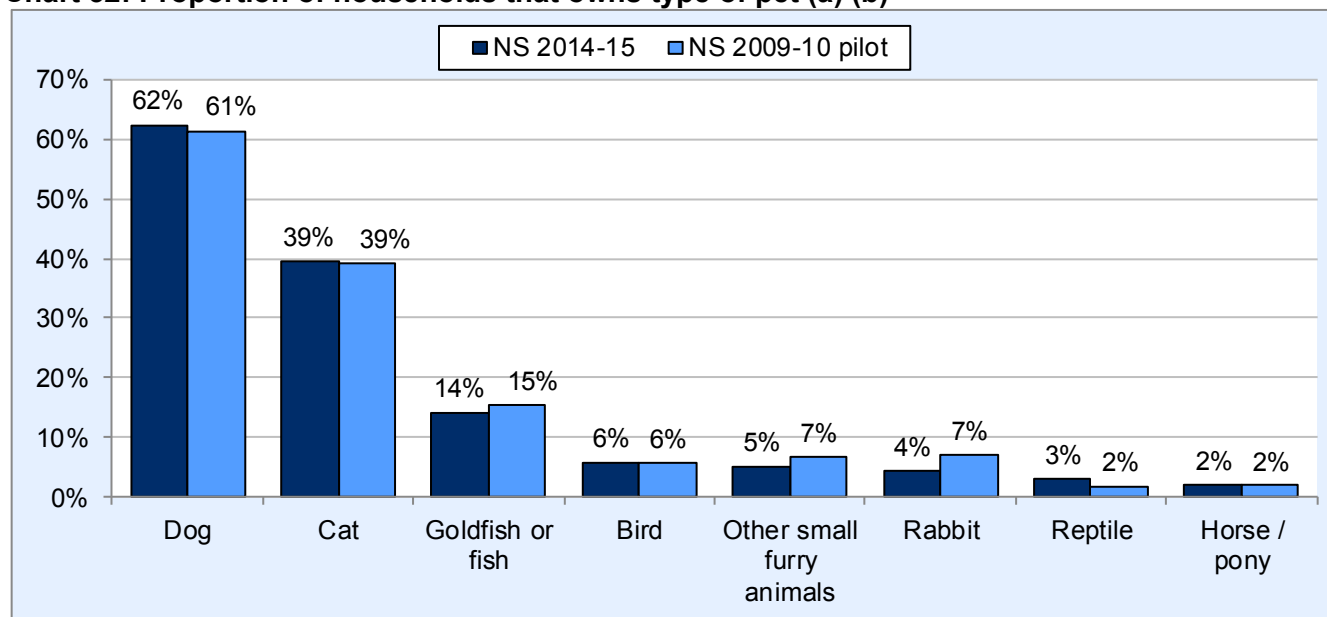
## Pet welfare

The [Animal Welfare Act 2006](#) brings together welfare legislation relating to farmed and non-farmed animals. The [Companion Animal Welfare Enhancement Scheme \(CAWES\)](#) aims to promote animal welfare in Wales, and provides funding for local authorities to assess compliance with the Animal Welfare Act 2006. The Welsh Government has issued [codes of practice](#) for the welfare of cats, dogs, horses and rabbits. To provide information on these issues, the National Survey asked people a number of questions about pets, including about pet insurance and whether dogs had been micro-chipped.

47% of households had a pet. The same question was asked in the 2009-10 National Survey for Wales pilot, where 44% of people reported that a pet was owned by someone in their household.

Those who had a pet were then asked which pets they owned. The results are displayed in Chart 32, along with the results from the 2009-10 National Survey pilot.

**Chart 32: Proportion of households that owns type of pet (a) (b)**



(a) Percentages do not add to 100% as respondents were able to select more than one answer.

(b) 'Primate' and 'other' have been removed from the chart due to small numbers.

For each type of pet owned by the households, respondents were asked whether they acquired the pet in the last 5 years, and also where they got the pet from. Results for these can be found on [StatsWales](#).

Respondents who had a cat, dog or horse and had acquired it within the last 5 years were asked if they had the pet insured.<sup>33</sup> 50% had their horse insured, 46% had their dog insured and 21% had their cat insured.

Respondents who said their household had acquired their dog<sup>33</sup> within the last 5 years were asked whether that dog had been micro-chipped. 78% said their dog had been micro-chipped.

<sup>33</sup> If respondent had more than one pet of this type, they were asked to think about the one most recently obtained.



## Arts, museums and heritage

The [Programme for Government](#) chapter on culture and heritage includes a key action to widen access to Wales' culture, heritage and sport, and encourage greater participation. There are also more detailed aims for each of these three areas. The [Arts Council of Wales](#) has as a key objective increasing the levels of arts engagement and participation in Wales. The [Museum Strategy for Wales 2010-15](#) aims to improve museums in Wales by 2015 by offering museums for everyone, with collections that represent our rich and diverse culture, and to provide relevant, robust and sustainable services for citizens. The [Historic Environment Strategy](#) aims to protect Wales' heritage whilst encouraging access, enjoyment and participation.

In 2014-15, the National Survey asked people about their views on arts events, museums and historic places.

People were shown examples of the arts, museum or historic places and were asked the following questions:<sup>34</sup>

<b>Arts:</b> In the last 12 months have you been to any of these events in Wales?	<b>Heritage:</b> In the last 12 months have you visited any of these places in Wales?	<b>Museum:</b> In the last 12 months have you done any of these things in Wales?
<ul style="list-style-type: none"> <li>• Play / drama / pantomime / musical / comedy event</li> <li>• Opera / classical music performance / other live music event</li> <li>• Film at an arts centre</li> <li>• Carnival / street arts / arts festival (e.g. music, dance, Eisteddfod)</li> <li>• Exhibition or collection of art, craft, photography or sculpture</li> <li>• Event including video art or electronic art</li> <li>• Event connected with books or writing</li> <li>• Circus (not involving animals)</li> <li>• Dance performance</li> <li>• Other arts/music/cultural event</li> </ul>	<ul style="list-style-type: none"> <li>• A historic park or garden open to the public</li> <li>• A historic place of worship attended as a visitor (not to worship)</li> <li>• A monument such as a castle, fort or ruin</li> <li>• A site of archaeological interest (e.g. Roman villa, ancient burial site)</li> <li>• Other historic / heritage site</li> </ul>	<ul style="list-style-type: none"> <li>• Visited a museum</li> <li>• Used a museum café or shop</li> <li>• Heard a talk given by a museum curator</li> <li>• Attended an event or workshop in a museum</li> <li>• Made an enquiry to a museum about a subject or item of interest</li> <li>• Used a museum for research purposes</li> </ul>

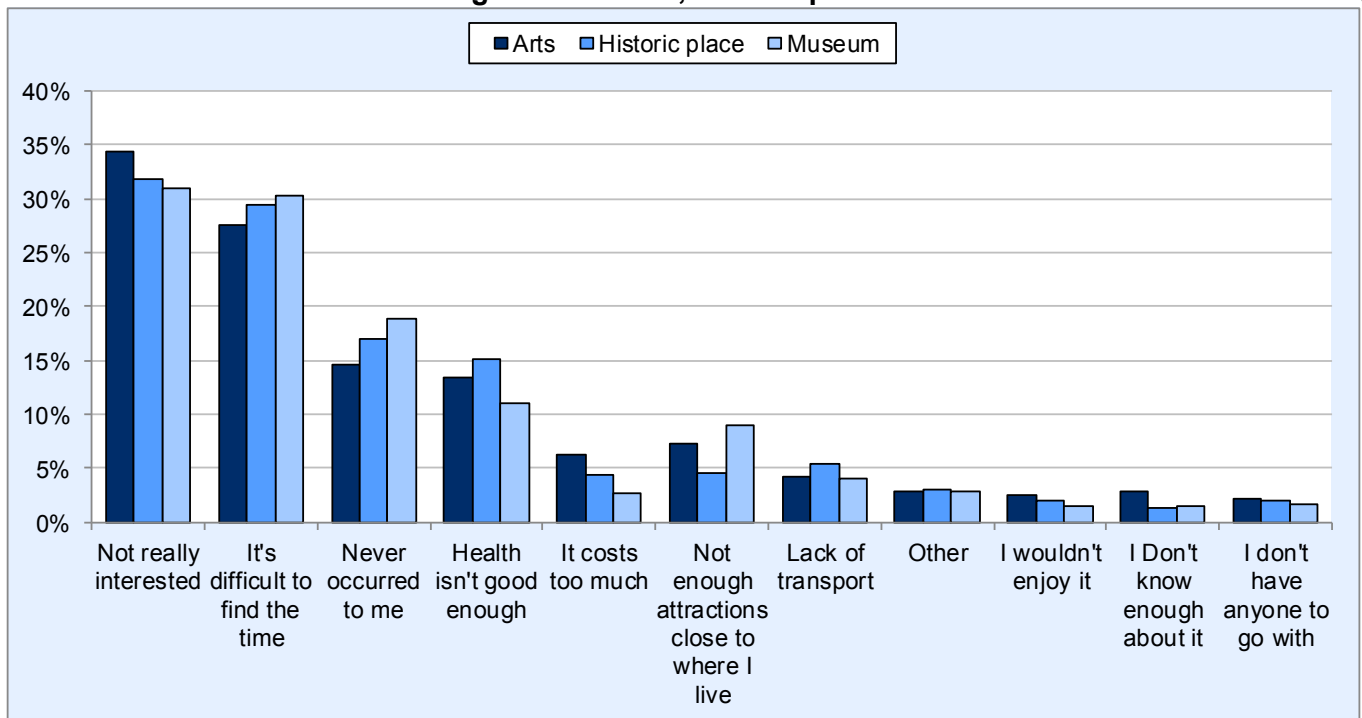
58% of people had been to an arts event, 59% had visited a historic place, and 39% had been to a museum.

Those who had been to an arts event, historic place or museum were then asked how satisfied they were with their visit. 97% of people were satisfied with the arts or historic place they visited, and 96% were satisfied with the museum they visited.

<sup>34</sup> These lists were simply provided as examples: the exact type of event / venue attended was not captured.

In the last 12 months, 42% had not been to an arts event, 41% had not visited an historic place, and 61% had not been to a museum. These people were asked about the main reason for not going. The results are shown in Chart 33.

**Chart 33: Reason for not attending an arts event, historic place or museum in the last 12 months (a)**



(a) Percentages do not add to 100% as respondents were able to select more than one reason.

People were most likely to give 'not really interested' as their reason for not visiting an arts event, historic place or museum in the last 12 months, followed by 'it's difficult to find the time' and 'it never occurred to me'.

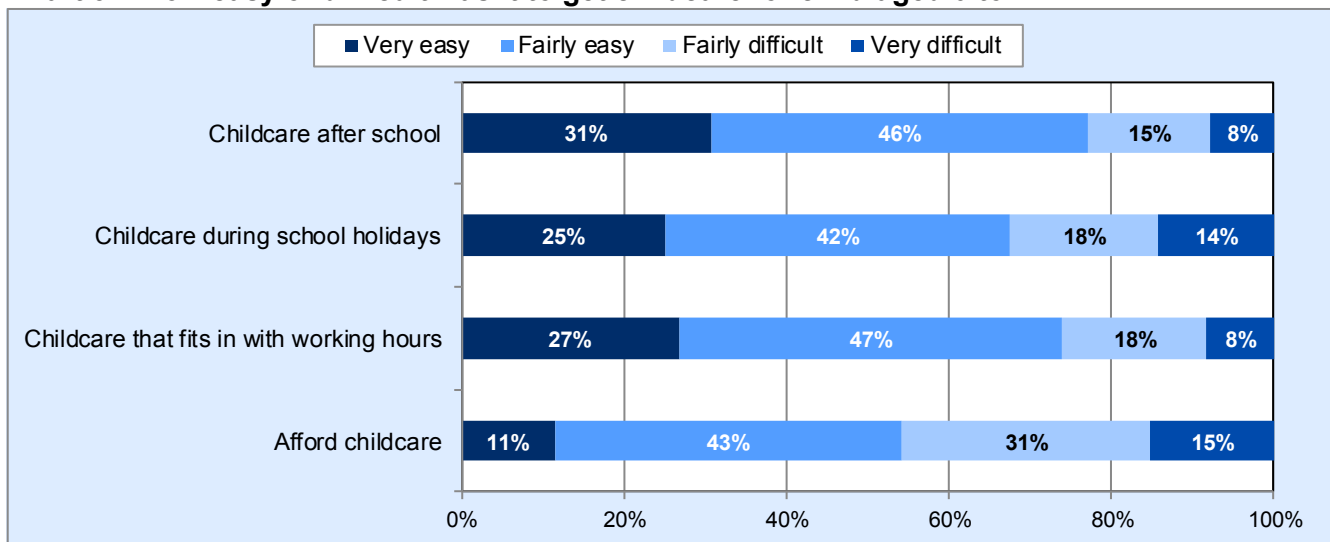
## Childcare

The Welsh Government states that improving access to affordable, high-quality childcare is a key priority and this is included in its [Nurturing Children, Supporting Families](#) strategy. Childcare enables parents to work or access training, and is therefore argued to increase economic growth, tackle poverty and reduce inequalities.

In 2014 -15 the National Survey introduced questions on childcare in order to determine whether factors such as the lack of childcare or its cost or inaccessibility are reported as influencing a parent’s decision not to work, or to work fewer hours.

Parents with a child aged 0 to 14 were asked if they ever needed to arrange for their child to be looked after in order for the parent to work, study or go on training. 49% of parents with a child in this age range said that they did need to arrange childcare. Parents who had used formal childcare (that is, not their family and friends) were asked further questions about the ease of getting childcare. The results can be seen in Chart 34.

**Chart 34: How easy or difficult was it to get childcare for child aged 0 to 14**



46% of parents who had used formal childcare found it difficult<sup>35</sup> to afford; 74% of people found it easy<sup>36</sup> to get childcare that fits around their working hours. 32% of parents found it difficult to find formal childcare during school holidays.

The results showed some variation when the age of the child was taken into account. A higher proportion (51%) of parents with a child aged 0 to 4 found it difficult to afford childcare than parents with a child aged 5 to 11 (36%). When asked how satisfied or dissatisfied they were with the formal childcare received by their child, a large majority of parents said that they were satisfied (93%).<sup>37</sup>

<sup>35</sup> Difficult is defined as those who said ‘very difficult’ or ‘fairly difficult’.

<sup>36</sup> Easy is defined as those who said ‘very easy’ or ‘fairly easy’.

<sup>37</sup> Satisfied is defined as those who said ‘very satisfied’ or ‘fairly satisfied’.

## Play

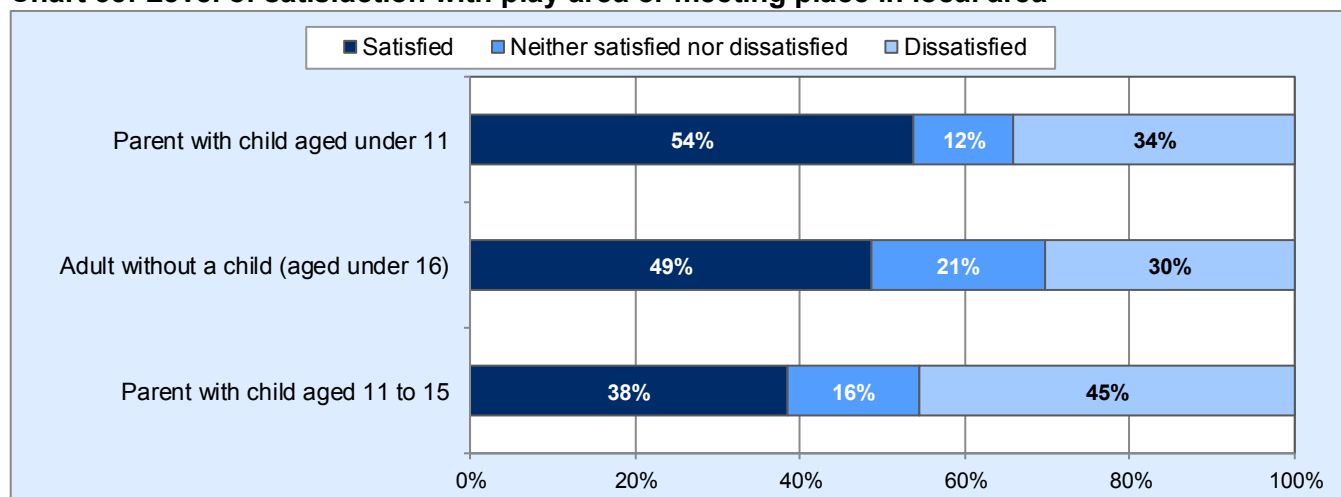
The United Nations Convention on the Rights of the Child states that ‘Children have the right to relax and play, and to join in a wide range of cultural, artistic and other recreational activities’.<sup>38</sup>

The Welsh Government is a signatory to this convention, and it states that it wants to improve play opportunities in Wales. Individual local authorities are charged with carrying out Play Sufficiency Assessments (PSA) to identify levels of provision within each authority. However, the measures used in these assessments are not consistent across authorities so questions on play were introduced in the 2014-15 National Survey in order to capture the perceptions of parents, and to provide consistent evidence on a national scale.

Parents of children aged 1 to 10 were asked how satisfied or dissatisfied they were with the available outdoor and indoor places for their child to play in the local area.<sup>39</sup> Parents with a child aged 11 to 15 were asked how satisfied/dissatisfied they were with the places in the local area where their child could meet and get together with friends.<sup>40</sup> A third question was asked of people who did not have a child under the age of 16. This group were asked how satisfied/dissatisfied they were with places and spaces in the local area for children and young people to play or meet up.

The results from these three questions can be found in Chart 35.

**Chart 35: Level of satisfaction with play area or meeting place in local area**



54% of parents with a younger child were satisfied<sup>41</sup> with the play facilities in their local area; whilst 38% with a child aged 11 to 15 were satisfied. Those that were dissatisfied<sup>42</sup> were shown a list of possible reasons for their dissatisfaction and were then asked to choose those they thought were applicable. Of these, 83% with a child aged 1 to 10 said there was a lack of suitable outdoor public places for their child to play and 64% said there was a lack of suitable indoor spaces. Parents with a child aged 11 to 15 who were dissatisfied with the play areas and meeting places in their local area also cited a lack of suitable outdoor (77%) and indoor (79%) public places, and 64% said there were too few clubs / organised activities.

Tables of childcare results split by the gender of the respondent, gender of child and geographical area will be published shortly on [StatsWales](http://StatsWales).

<sup>38</sup> [United Nations Convention on the Rights of the Child - Article 31 - Leisure, play and culture](#).

<sup>39</sup> If a parent had more than one child in this age group, one was selected at random.

<sup>40</sup> Again, the child was randomly selected if there was more than one in this age group.

<sup>41</sup> Satisfied is defined as ‘very satisfied’ or ‘fairly satisfied’.

<sup>42</sup> Dissatisfied is defined as ‘very dissatisfied’ or ‘fairly dissatisfied’.

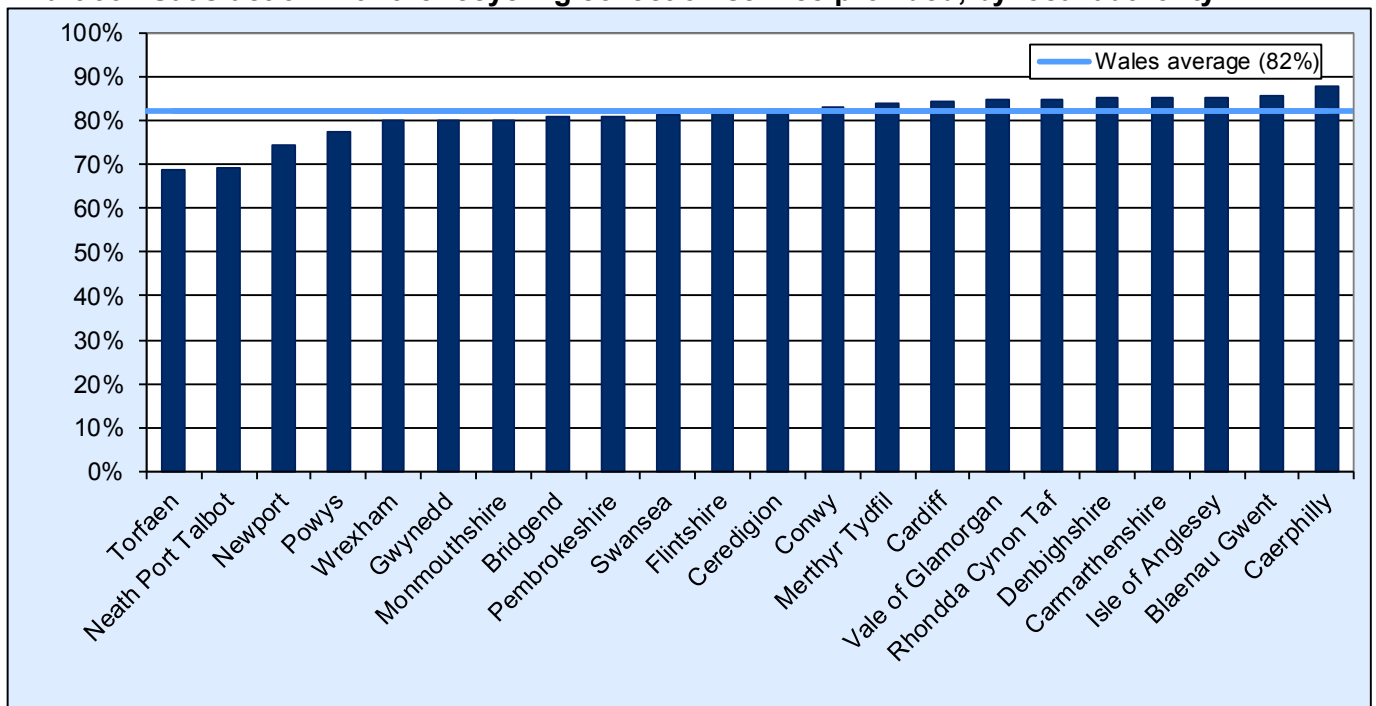
## Recycling

The Welsh Government aims to become a high recycling nation by 2025 and a zero waste nation by 2050. The [Towards Zero Waste](#) strategy document outlines the actions that the Welsh Government plans to take in order to achieve this aim.

A series of questions were included in the National Survey about people’s recycling activities in order to establish what people currently do. These questions were asked in order to monitor progress towards these goals and to establish what if any policy intervention is needed to encourage more recycling. Questions were also included about people’s satisfaction with their local authority recycling collection service.

82% of people were satisfied with the recycling collection service provided by their council. Chart 36 shows how this varies by local authority. 69% were satisfied in Torfaen, compared with 88% in Caerphilly.

**Chart 36: Satisfaction with the recycling collection service provided, by local authority**

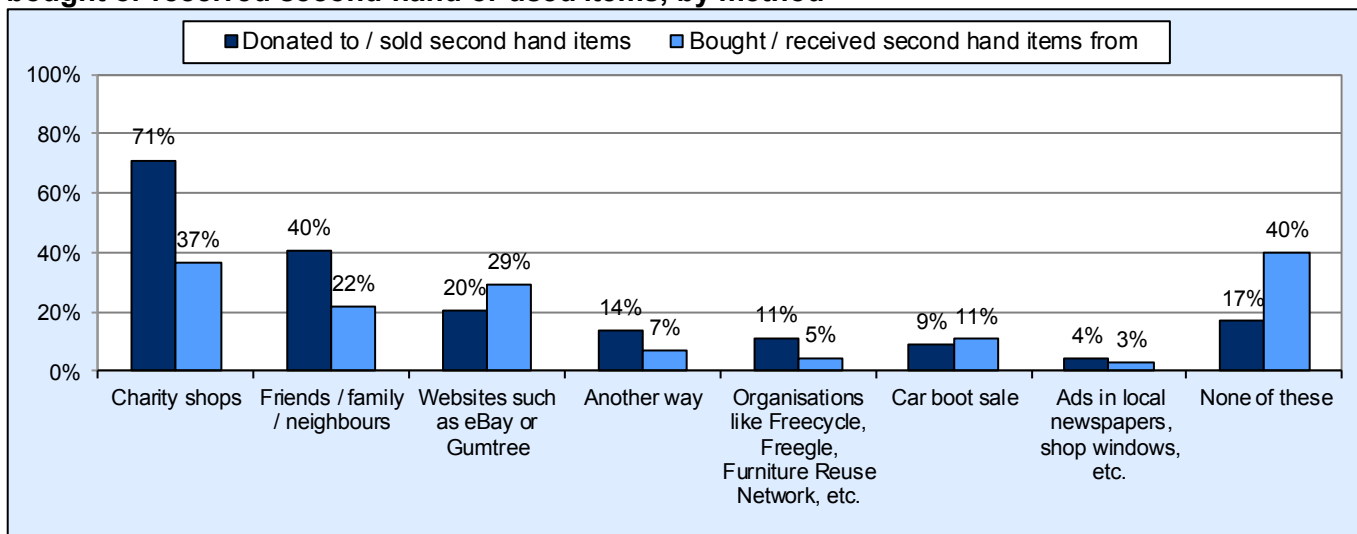


Respondents were asked about other methods of recycling, such as reusing, donating and selling second-hand items. They were asked whether in the last 12 months, they had personally sold or given away items that they would have otherwise thrown away; and also whether they had bought or received second-hand or used items. 83% of people had donated or sold second-hand items in some way, and 60% had bought or received a second-hand item.

Charity shops were the most popular way of donating and buying second-hand items. 71% had donated to a charity shop in the previous 12 months and 37% had bought from a charity shop in the same period. The use of websites such as eBay or Gumtree was more popular to buy second-hand items than it was to sell items, with 29% stating that they had bought a second-hand item through a website, and 20% stating that that they had sold items this way. The use of websites for this purpose was far more popular for people aged under 45 than those aged over 45. 45% of those aged under 45 had bought an item through a website and 31% had sold, compared with 17% and 12% of those aged 45 or over respectively.

Chart 37 shows the differences between the proportions of people who donate or sell items compared with how many buy or receive second-hand items, split by means of selling/buying.

**Chart 37: Percentage who had sold or given away items compared with the percentage that had bought or received second-hand or used items, by method**



## Future generations

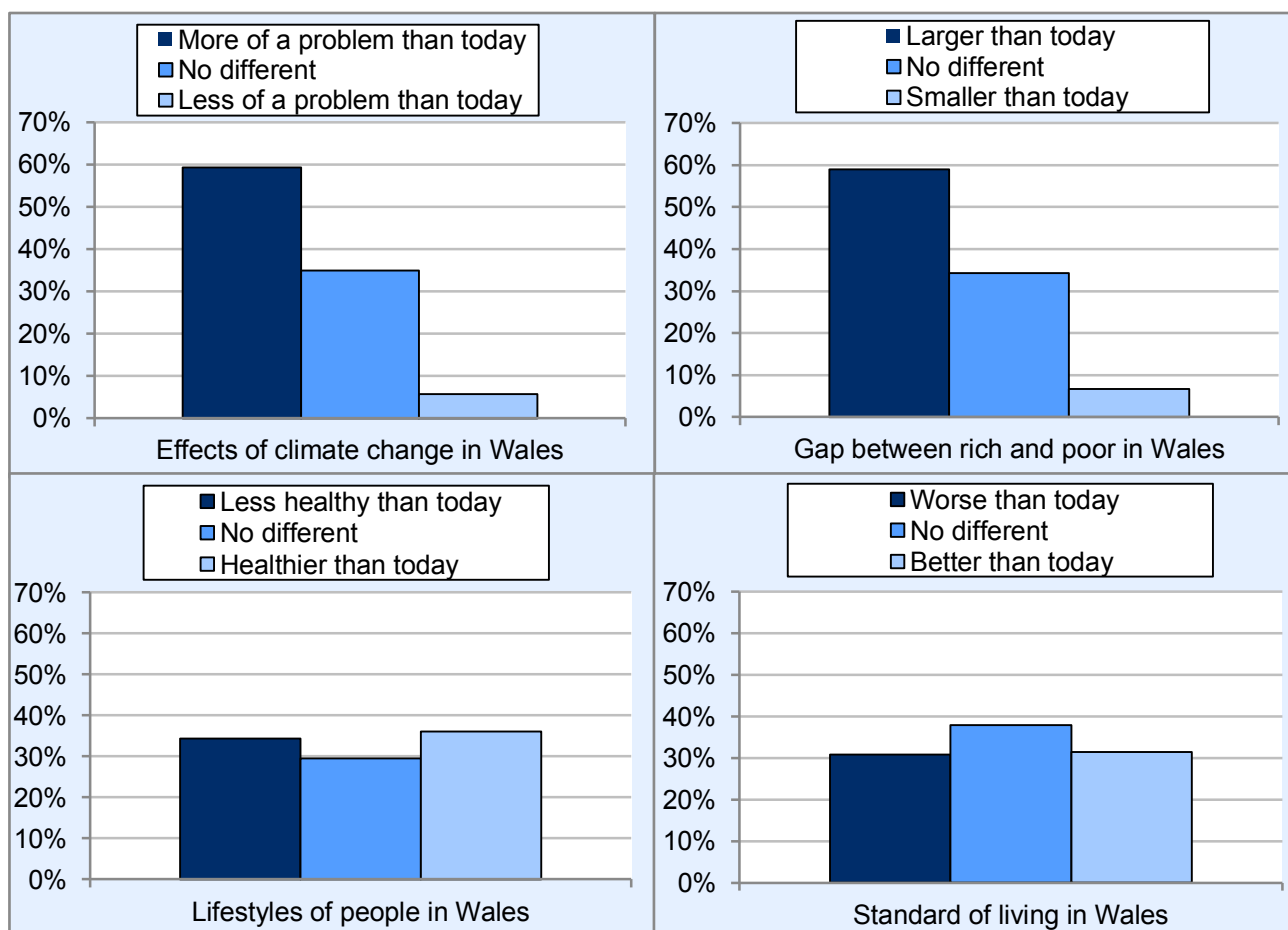
The [Well-being of Future Generations \(Wales\) Act 2015](#) aims to improve the well-being of people in Wales and ensure that present needs are met without compromising the ability of future generations to meet their own needs. The Act identifies seven well-being goals to improve the well-being of Wales and requires that public bodies aim towards these goals. It also requires national indicators to be established to measure whether the goals are being achieved.

The National Survey is used to gauge the public's perception about the future. Respondents were asked the following questions: 'In 25 years' time, do you think the...'

- lifestyles of people in Wales will be... Healthier than today, Less healthy than today, No different
- standard of living in Wales will be... Better than today, Worse than today, No different
- the gap between rich and poor in Wales will be... Larger than today, Smaller than today, No different
- effects of climate change in Wales will be... More of a problem than today, Less of a problem than today, No different

Chart 38 presents the results.

**Chart 38: People's thoughts on aspects of Wales in 25 years' time**



59% of people thought that the gap between rich and poor will be larger in 25 years' time and 59% of people thought that the effects of climate change will be worse in 25 years' time. For both of these statements there were large differences between the positive and negative responses. Around a third of people thought that the gap between rich and poor and the effects on climate change will be no different than today (34% and 35% respectively).

The results for lifestyles of people and standards of living had a relatively even spread of responses across the positive, negative and 'no different' categories.

## Accommodation

Housing has an important influence on health, education, work, and the communities in which we live. A stated aim of the Welsh Government is to help ensure that as many people as possible live in accommodation that is of a high standard. In recent years, the number of people renting their home, particularly those renting privately, has increased. The Welsh Government introduced the [Renting Homes Bill](#) to try to address problems encountered by some people who rent their homes.

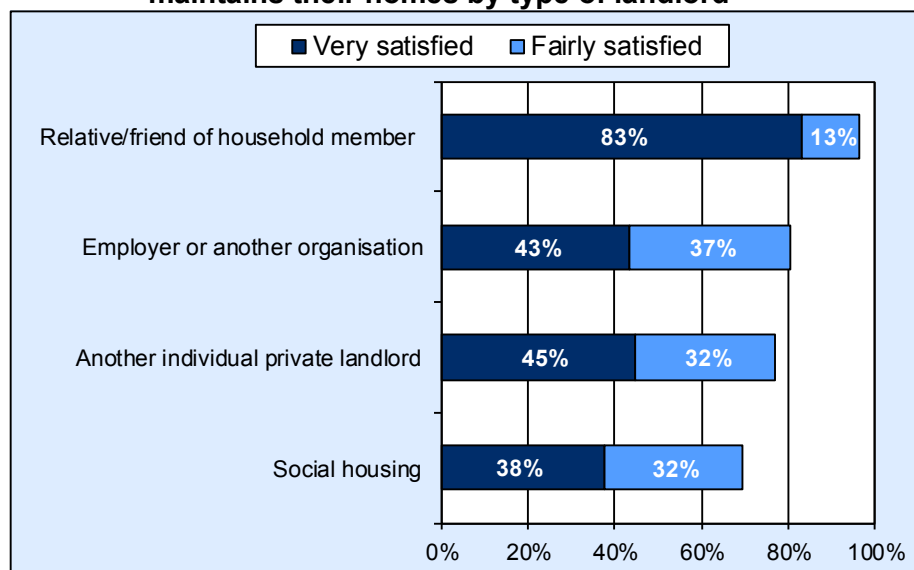
In order to help measure the effects of the legislation as well as inform the development of any secondary legislation under the Bill, the National Survey included some questions about people's satisfaction with their accommodation.

94% of people were satisfied (68% very satisfied and 26% fairly satisfied) with their accommodation. This varied by tenure. 97% of owner-occupiers were satisfied with their accommodation, compared with 90% of those in private rented accommodation and 83% of those who were in social housing.

These questions were also asked in the [English Housing Survey](#), where a similar pattern was observed. In 2012-13, 90% of people in England were satisfied with their accommodation, 95% of owner-occupiers were satisfied, 84% of private renters and 81% of social renters.<sup>43</sup>

To gain greater understanding of the rented housing sector, those who rented their accommodation were asked additional questions about satisfaction with the way their landlord repairs and maintains their homes, how long they had lived at the address, and what type of accommodation (e.g. rented or owner-occupied) they lived in previously. 74% of those who rented their accommodation were satisfied with the way their landlord repairs and maintains their homes. Chart 39 shows how satisfaction varied by type of landlord.

**Chart 39: Satisfaction with the way their landlord repairs and maintains their homes by type of landlord**



- 96% of people who were renting from a relative or a friend were satisfied with the way their landlord maintained their homes (83% very satisfied and 13% fairly satisfied).
- This compared with 69% of people who were renting in social housing (i.e. from their local authority or a housing association) (38% very satisfied and 32% fairly satisfied).

Renters were also asked how long they had lived at their current address. This varied considerably by the type of landlord, with those renting from an individual private landlord the most likely to have been at the property for a shorter length of time. 48% of people renting from an employer or another organisation and 44% of those renting from an individual private landlord had lived at the address for less than 12 months, compared with 11% of those renting in social housing. 44% of those renting in social housing had lived in their properties for 10 years or more, compared with 6% of those renting from an individual private landlord.

<sup>43</sup> The [English Housing Survey](#) was carried out with the household representative (the person who owns/rents the home, the oldest person or the person who earns the most) and not a randomly-selected adult aged 16+ as in the National Survey. This difference in design may contribute to differences in results between the two surveys.



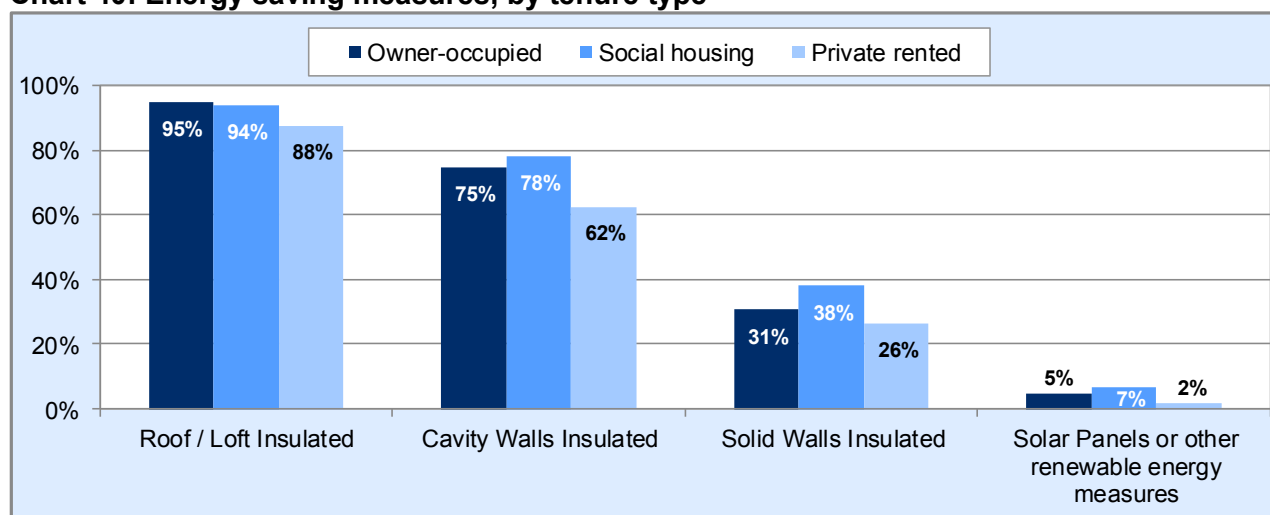
## Energy saving measures

The Welsh Government's [Fuel Poverty Strategy 2010](#) included a commitment to reduce the number of households living in fuel poverty in Wales, and to take action to achieve the target that as far as reasonably practicable no household in Wales will be living in fuel poverty by 2018. A household is considered to be in fuel poverty if they spend 10% or more of their net income on energy costs.

Understanding the level of fuel poverty across Wales, the type of households in the severest fuel poverty, and where these households are, influences how the Welsh Government targets funding to tackle fuel poverty. In addition to working with power companies to reduce costs, the strategy focuses on increasing the energy efficiency of homes in Wales. There are currently two home energy efficiency schemes in place in Wales (NEST and ARBED) and more information about them can be found [here](#). Questions on insulation and energy supply were included in the National Survey for the first time in 2014-15.

Respondents were asked whether their loft, cavity walls or solid walls were insulated, and whether they had solar panels or other renewable energy measures. These questions resulted in a higher proportion of 'Don't know' responses than many other questions in the survey, 13% didn't know if their cavity walls were insulated and 15% didn't know if their solid walls were insulated. Excluding these 'Don't know' responses and also those where the question was not applicable to the property produces the results shown in Chart 40, by different tenure types.

**Chart 40: Energy saving measures, by tenure type**



In total, 94% of those who knew whether or not their roof was insulated said that it was. In 2008, the [Living in Wales Survey](#) had a comparable result of 91%.<sup>44</sup> Private rented properties were less likely to have loft insulation than owner-occupied properties (88% and 95% respectively). This was also true for cavity wall insulation where 62% of private rented properties had insulation compared with 75% of owner-occupied properties. The overall figure for cavity wall insulation (where the respondent knew if the walls were insulated or not) was 74%. This is a substantial increase since the 2008 Living in Wales finding (56%). The overall figure for solid wall insulation (where the respondent knew if the walls were insulated or not) was 31%; this question was not asked in the Living in Wales survey. The National Survey found that 4% of all properties had solar panels or other renewable energy measures, whilst 7% of social housing had these features.

Switching energy supplier can be another way of reducing energy costs. Respondents were asked if they had switched their gas and/or electricity supplier in the last year. 14% had switched supplier in the last year, 36% had switched supplier at an earlier date, and 50% had never switched supplier.

<sup>44</sup> The Living in Wales Survey was carried out with the household representative (the person who owns/rents the home, the oldest person or the person who earned the most) and not a randomly-selected adult aged 16+ as in the National Survey. This difference in design may contribute to the difference in results between the two surveys.

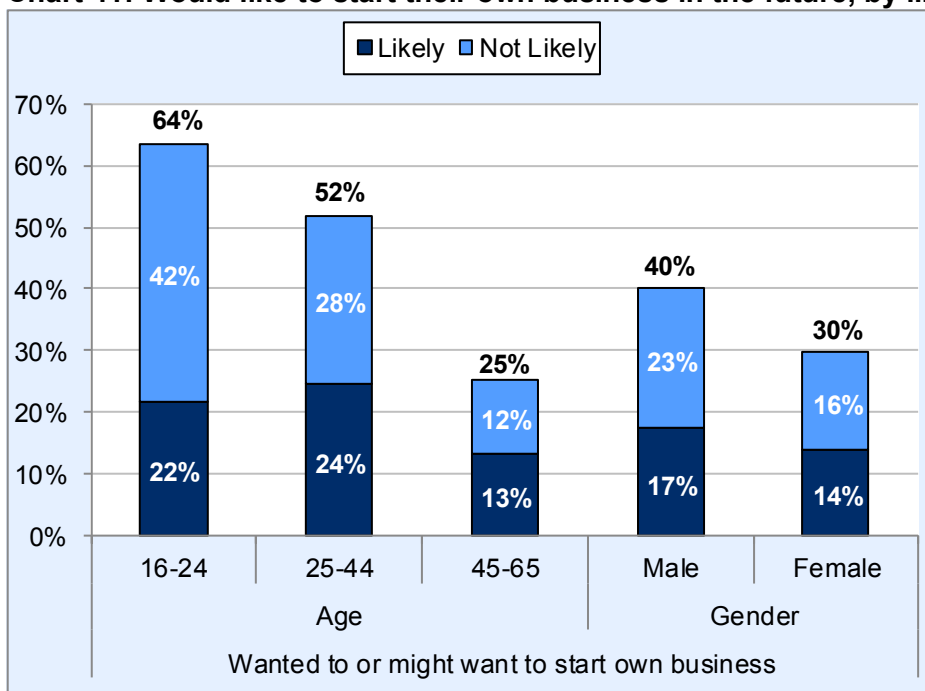
## Entrepreneurship

The [Programme for Government](#) outlines the Welsh Government’s aims to develop a more entrepreneurial culture in Wales. This includes identifying what support is needed by small firms to start up and allow them to grow. To help understand the issues, in 2014-15 the National Survey included questions on entrepreneurship.

The National Survey asked people who were not already self-employed and aged 65 or under whether they would ever like to start their own business. 35% said they wanted or might want to start their own business in the future. These respondents were then asked how likely they were to start their own business in the next five years. 20% said it was very likely, 24% fairly likely, 40% not very likely and 15% not likely at all.

Chart 41 shows the proportion of people who said they wanted or might want to start their own business in the future, split by how likely they thought it actually was as well as by age and gender.

**Chart 41: Would like to start their own business in the future, by likelihood, age and gender**



The 16-24 age group had the highest proportion of people wanting to start their own business in the future (64%), followed by those aged 25-44 (52%). The 45-65 group had the lowest proportion (25%).

More men than women wanted to start their own business in the future (40% compared with 30%). Of the 40% of men who did want to start their own business in the future, 43% of them thought it was likely that they would start their own business in the next five years (equates to 17% of men as shown in Chart 41). Of the 30% of women who wanted to start their own business, 47% of them thought it was likely (equates to 14% of women as shown in Chart 41).<sup>45</sup>

<sup>45</sup> 'Likely' is defined as those who said 'very likely' or 'fairly likely', and 'Not likely' is defined as those who said 'not very likely' or 'not at all likely'

## Armed forces

The Welsh Government has made a commitment to supporting the Armed Forces Community in Wales and to ensuring that members of this community are not disadvantaged in accessing public services as a result of Armed Forces service. The [Package of Support for the Armed Forces Community in Wales](#) sets out the Welsh Government's commitments to this group.

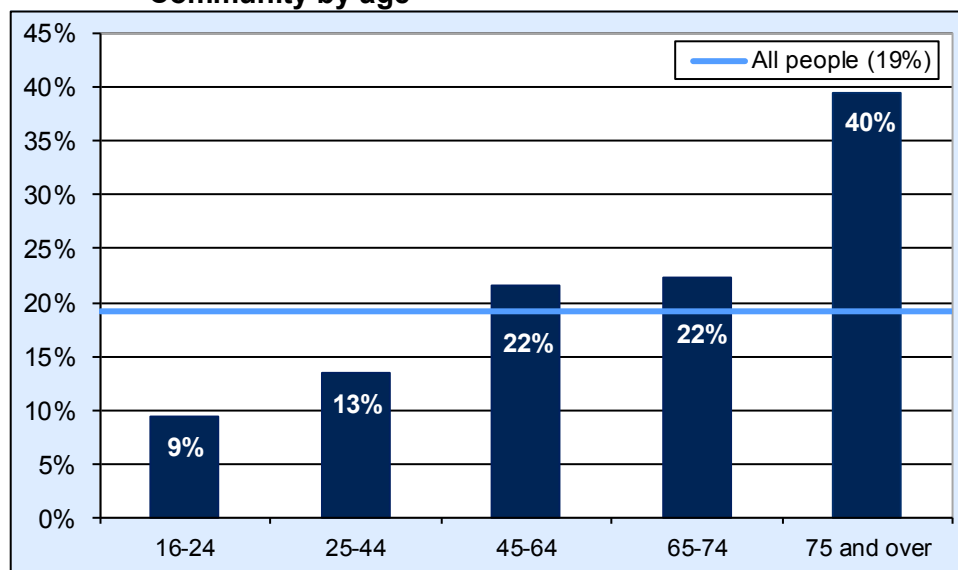
The Armed Forces Community includes all those towards whom the country has a moral obligation due to service in the Armed Forces. There are no strict criteria or legal definitions<sup>46</sup>; however, for the purposes of this release the Armed Forces Community was defined as follows:

- Current or ex-serving members of the Armed Forces (Regular or Reserve)
- Family (i.e. spouse, civil partner, unmarried partner or child) of current or ex-serving member (Regular or Reserve)<sup>47</sup>

In 2014-15, the National Survey included questions to help identify the number and characteristics of people in the Armed Forces Community. This information is needed by the Welsh Government to gauge the levels of demand and determine financial and future service provision for each element of the Package of Support. It will also help to identify areas for further policy development. The survey found that:

- 7% of respondents were either currently serving in the UK armed forces or had previously served in the UK armed forces.<sup>48</sup>
- 16% of respondents had at least one member of their immediate family (i.e. parent, husband/wife, civil partner, unmarried partner or child) who was currently serving or who had previously served in the UK armed forces.
- 19% of respondents were classed as being in the Armed Forces Community. That is, they were either serving or had served in the Armed Forces, or had at least one member of their family<sup>47</sup> who was currently serving or had served. The likelihood of being in the Armed Forces Community increased with age as is shown in Chart 42.

**Chart 42: Percentage of people who are in the Armed Forces Community by age**



- Older people were much more likely to be in the armed forces community than younger people.
- 40% of people aged 75 and over were in the armed forces community compared with only 9% of young adults (aged 16 to 24).

<sup>46</sup> See the [Armed Forces covenant](#) for more detail on the definition of the Armed Forces community

<sup>47</sup> Note that a parent of a serving or ex-serving member is not defined as being in the 'Armed Forces Community'

<sup>48</sup> Note that the National Survey for Wales is a survey of residential households which does not include communal establishments such as army barracks etc.

## Terms and definitions

### Answer options

We have combined answer options for opinion questions in this report as follows:

<u>Answer options:</u>	<u>Reported as:</u>
Very satisfied and fairly satisfied	Satisfied
Very dissatisfied and fairly dissatisfied	Dissatisfied
Very easy and fairly easy	Easy
Very difficult and fairly difficult	Difficult
Strongly agree and tend to agree	Agree
Strongly disagree and tend to disagree	Disagree

### Average

Where 'average' is mentioned in this report it refers to an arithmetic mean.

### Welsh Index of Multiple Deprivation

The [Welsh Index of Multiple Deprivation \(WIMD\)](#) is used as the official measure of deprivation in Wales. Deprivation is a wider concept than poverty. Deprivation refers to wider problems caused by a lack of resources and opportunities. The WIMD is constructed from eight different types of deprivation. These are: income, housing, employment, access to services, education, health, community safety and physical environment. Wales is divided into, 1,909 Lower-Layer Super Output Areas (LSOA) each having about 1,600 people. Deprivation ranks have been worked out for each of these areas: the most deprived LSOA is ranked 1, and the least deprived 1,909. For this bulletin, we have grouped the people living in the 20 % of LSOAs that are most deprived based on WIMD score and compared them against the 20% of the LSOAs that are least deprived. – see also Material Deprivation below.

### Household

A household is defined as one person living alone or a group of people (not necessarily related) living at the same address with common housekeeping – that is, sharing a living room or sitting room or at least one meal a day.

### Parent

The term 'parents' is used in this report to refer to parents and legal guardians of children aged under 20.

### People

Within the report, 'people' refers only to adults aged 16 and over. The one exception to this is for the results contained in the internet section. These results relate to adults aged 18 and over, so as to be consistent with the definition used in Welsh Government policy on internet use and access.

### Qualifications

Respondents' highest qualifications have been grouped according to the National Qualification Framework (NQF) levels, where level 1 is the lowest level of qualifications and level 8 is doctoral degree or equivalent. For the National Survey, respondents have been grouped into 5 groups, those with no qualifications are in the lowest category and respondents with qualifications at levels 4 to 8 have been grouped together in the highest qualification category. More information about the NQF levels can be found [here](#).

**Urban / rural** - "Urban" includes settlements with a population of 10,000 or more and small towns and their fringes, where the wider surrounding area is less sparsely populated. "Rural" includes all other areas.

## Key quality information

### Background

The National Survey was carried out by TNS-BMRB and Beaufort Research on behalf of the Welsh Government. The results reported here are based on interviews completed between 1 April 2014 and 12 April 2015 (fieldwork was extended slightly beyond the one year mark, in order to increase the sample size).

Approximately 25,000 addresses were chosen randomly from the Royal Mail's Small User Postcode Address File. Interviewers visited each address, randomly selected one adult (aged 16+) in the household, and carried out a 25-minute face-to-face interview with them. A total of 14,285 interviews were achieved. This equates to a response rate of 64%.<sup>49</sup>

### Topics covered

The survey covers a range of topics, with a focus on well-being and people's views of public services. In 2014-15, the main topics were:

- overall satisfaction with, health and education systems and the Welsh Government;
- access to and satisfaction with GP, hospital and ambulance services;
- personal care plans, eye care and use of social care services
- parental support with literacy and numeracy;
- satisfaction with local authority services;
- well-being, including community cohesion and, feeling safe;
- satisfaction with accommodation and energy saving measures;
- arts / museums / heritage;
- companion animals;
- childcare;
- play;
- recycling;
- democracy and understanding of local councils;
- future generations;
- Armed Forces;
- entrepreneurship;
- household and child material deprivation / financial inclusion;
- media consumption;
- internet use, e-Safety and public service websites; and
- active travel

The full questionnaire is available on the [National Survey web pages](#).

---

<sup>49</sup> Details of how the sample size is calculated are set out in the Technical Report. For example, the final response rate excludes addresses that were found to be unoccupied.

## Filtering and subsampling

Not all questions are asked of all respondents. Some questions only apply to some respondents (e.g. questions for parents with children at school); others are asked of a random subsample of respondents because the results aren't needed at local authority level.

This means that robust results will be available at local authority level only for some questions; for other questions, robust results will only be available at regional or national level.

The arrangements for subsampling topics are set out below

<b>Topics asked of everyone eligible to answer</b> (up to 14,000 respondents, around 600 per LA).	<b>Regional / LHB level subsample</b> (3,000-4,500 Respondents)	<b>National level subsample</b> (around 2,000 respondents, i.e. around 100 per LA).
Accommodation* Welsh language Arts / museums / heritage* Active travel – children Parental help with learning* Childcare* Play* Personal care plan* Ambulance services* LA services and custodianship of area* Democracy and understanding* Well-being Demographics (country of birth, national identity, ethnicity, sexual orientation, religion, employment status, general health, limiting long-term illness, gender, qualifications, marital status, tenure) Armed forces* Household material deprivation* Financial inclusion Child material deprivation* Fuel poverty* Internet questions (most)* e-Safety*	<b>Regional level:</b> (750 respondents per region (North / Mid / South East / South West Wales))  Companion animals** Recycling* Satisfaction with education in Wales** Entrepreneurship* Media consumption* Some internet questions*  <b>LHB level:</b> (650 respondents in each of the 7 Local Health Boards)  Local NHS services GP services Hospitals Eye care* Satisfaction with health system	Community cohesion* View of social care services in local area* Use of health / social care services in Welsh* Future generations* Welsh Government Active travel

\* New topic for 2014-15.

\*\* Subsample of 3,000 drawn equally in each LA (not equally in each region)

## Interpreting the results

Percentages quoted in this release are based on only those respondents who provided an answer to the relevant question. Missing answers occur for several reasons, including refusal or an inability to answer a particular question and cases where the question is not applicable to the respondent.

Where a relationship has been found between two factors, this does not mean it is a causal relationship. More detailed analysis is required to identify whether one factor causes change in another.

Throughout this release, references are made to other sources of information. These sources have been identified by the National Survey team, through discussions with policy and analytical colleagues, and through a [comparability study](#) undertaken in early 2012. Checks are in place to ensure the quoted figures are the most up-to-date figures available at the time of publication.

The results of the National Survey are weighted to compensate for unequal selection probabilities and differential non-response (i.e. to ensure that the age and sex distribution of the final dataset matches that of the Welsh population).

## Quality of the data

The [United Kingdom Statistics Authority](#) has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the [Code of Practice for Official Statistics](#).

Designation can be broadly interpreted to mean that the statistics:

- meet identified user needs;
- are well explained and readily accessible;
- are produced according to sound methods; and
- are managed impartially and objectively in the public interest.

Once statistics have been designated as National Statistics it is a statutory requirement that the Code of Practice shall continue to be observed.

## Quality Report

A summary [Quality Report](#) is available, containing more detailed information on the quality of the survey as well as a summary of the methods used to compile the results.

## Sampling variability

Estimates from the National Survey are subject to a margin of uncertainty. Part of the uncertainty comes from the fact that any randomly-selected sample of the population will give slightly different results from the results that would be obtained if the whole population was surveyed. This is known as sampling error.<sup>50</sup> Confidence intervals can be used as a guide to the size of the sampling error. These intervals are calculated around a survey estimate and give a range within which the true value is likely to fall. In 95% of survey samples, the 95% confidence interval will contain the 'true' figure for the whole population (that is, the figure we would get if the survey covered the entire population). In general, the smaller the sample size the wider the confidence interval. Confidence intervals are included in the tables of survey results published on [StatsWales](#).

---

<sup>50</sup> Sampling error is discussed in more detail in the [Quality Report](#) for the National Survey.

As with any survey, the National Survey is also subject to a range of other sources of error: for example, due to non-response; because respondents may not interpret the questions as intended or may not answer accurately; and because errors may be introduced as the survey data is processed. These kinds of error are known as non-sampling error, and are discussed further in the [quality report](#) for the survey.

### **Significant differences**

Where the text of this release notes a difference between two National Survey results, we have checked to ensure that the confidence intervals for the two results do not overlap. This suggests that the difference is statistically significant (but as noted above, is not as rigorous as carrying out a formal statistical test), i.e. that there is less than a 5% (1 in 20) chance of obtaining these results if there is no difference between the same two groups in the wider population.

Checking to see whether two confidence intervals overlap is less likely than a formal statistical test to lead to conclusions that there are real differences between groups. That is, it is more likely to lead to "false negatives": incorrect conclusions that there is no real difference when in fact there is a difference. It is also less likely to lead to "false positives": incorrect conclusions that there **is** a difference when there is in fact none. Carrying out many comparisons increases the chance of finding false positives. Therefore, when many comparisons are made the conservative nature of the test is an advantage because it reduces (but does not eliminate) this chance.

Where National Survey results are compared with results from other sources, we have not checked that confidence intervals do not overlap.

### **Technical report**

More detailed information on the survey methodology is set out in the [technical report](#) for the survey.

### **Revisions**

More information on our revisions policy is available [here](#).

### **Release policy**

Information about the process for releasing new results is available from the Welsh Government's [statistics web pages](#).

### **Availability of datasets**

The data behind the charts and tables in this release will be published in a series of topic-specific spreadsheets on [StatsWales](#) shortly after publication of this release.

An anonymised version of the annual dataset (from which some information is removed to ensure confidentiality is preserved), together with supporting documentation, will be deposited with the [UK Data Archive](#) after the publication of these results. For more information, please contact us (see below).

For questions that were also included in 2012-13 and/or 2013-14, more detailed breakdowns for subgroups such as local authority and Health Board level are possible by combining the results from different years to increase the sample size.



## Further uses of the results

The results will be used extensively by Welsh Government policy teams, but they are also relevant to a wide range of other external organisations and individuals:

- Health Boards have shown an interest in the results of the survey and how they could be used to monitor patient satisfaction. The results would also be of use to Health Boards as a comparator for their own surveys, and should be of interest to organisations such as Public Health Wales Observatory, and the NHS Wales Informatics Service (NWIS).
- The results will be of interest to a wide range of external organisations such as local authorities for planning and reporting purposes.
- The results will also be of interest to voluntary organisations, to the Public Services' communicators' network [CommsCymru](#), and to academics.

## Contact

Lisa Walters  
Knowledge and Analytical Services  
Welsh Government  
Cathays Park  
Cardiff  
CF10 3NQ

Telephone number: 029 2082 6685

E-mail: [surveys@wales.gsi.gov.uk](mailto:surveys@wales.gsi.gov.uk)

Website: [www.gov.wales/nationalsurvey](http://www.gov.wales/nationalsurvey)



All content is available under the Open Government Licence v3.0, except where otherwise stated.

<http://www.nationalarchives.gov.uk/doc/open-government-licence/version/3/>