



## National Survey for Wales: Headline results, April 2018 – March 2019

18 June 2019  
SFR 44/2019

The National Survey for Wales involves face-to-face interviews with around 12,000 randomly-selected adults aged 16 and over. The survey covers a wide range of issues, asking about people's experiences and views. Some of the results are used to measure progress towards the goals of the [Well-being of Future Generations Act 2015](#).

This release contains only a selection of results. Results on many more topics, including detailed breakdowns, are available in our interactive [Results viewer](#) and further analysis on particular topics will be published throughout the year.

### In this release



- [Climate change](#)
- [Satisfaction with public services](#)
- [Satisfaction with health services](#)
- [Satisfaction with schools](#)

- [Local environment](#)
- [Recycling](#)
- [Deprivation](#)
- [Access to services and facilities](#)
- [Sense of community](#)
- [Use of carrier bags](#)



- [Lifestyle behaviours](#)
- [Personal well-being](#)
- [Sport participation and demand](#)
- [Arts and cultural activities](#)
- [Welsh language](#)
- [Internet use](#)

A number of questions reported on in this release were also included in previous years. Only significant changes over time are noted.

### About this release

This release provides headline results from the National Survey for Wales in 2018-19.

Since 2016-17 the survey has replaced, and incorporated questions from, the Welsh Health Survey, the Arts in Wales Survey, the Welsh Outdoor Recreation Survey and the Active Adults Survey.

More information about methodology, topics and definitions can be found in [Key quality information](#).

The [full questionnaire](#) and [questionnaire guidance](#) provide further context about why we ask these questions. [Background information](#) is available on the [National Survey web pages](#).

## Climate change



In April 2019, the Welsh Government declared a climate emergency. All the National Survey interviews included in these results took place before that declaration.

People were asked for their views about climate change. **93%** of people thought that the **world's climate is changing**. Of these, **37%** said they are very concerned.

Of the people who do think the world's climate is changing, **48%** think it is caused mainly by human activity; **47%** think it is caused partly by **natural processes** and partly caused by **human activity**; and **5%** think it is caused mainly by natural processes.

People were asked about their concerns regarding **flooding** from heavy rainfall, burst riverbanks, or the sea. **11%** were concerned about the risk of flooding to their property, **28%** were concerned about flooding in their local area, and **62%** were concerned about the risk of flooding to other parts of Wales.

Results on the **local environment**, **recycling** and **re-use of carrier bags** can also be found in this report.

## Satisfaction with public services

People were asked to rate health services and the education system on a scale of 0 (extremely bad) to 10 (extremely good). They were also asked to rate their satisfaction with how the Welsh Government is doing its job, from 0 (extremely dissatisfied) to 10 (extremely satisfied). The average ratings given **out of 10** were:

**6.3** for **health**, **6.6** for **education**, and **5.4** for the **Welsh Government**

These questions have been asked in the survey since 2012-13 with some limited fluctuation in the results over the years. At **6.6** the average rating for satisfaction with education has returned to 2014-15 levels after a drop in 2016-17 and 2017-18.

## Satisfaction with health services

People with recent experience of using **health services** were asked about their satisfaction with these services.



**93%** were satisfied with the care they received from their **GP**.



**93%** were satisfied with the care received at their last NHS **hospital** appointment.

Satisfaction with the care received at hospital was similar for all age groups, but satisfaction with GP care was lower for younger people: **88%** of 16-24 year olds were satisfied, compared with **94%** of those aged over 75.

**40%** of people said they find it **difficult** to make a **convenient appointment** at their **GP surgery**.

## Satisfaction with schools

Parents of school age children were asked about their satisfaction with their child's school.



**90%** were satisfied  
with their child's  
**primary school**



**81%** were satisfied  
with their child's  
**secondary school**.

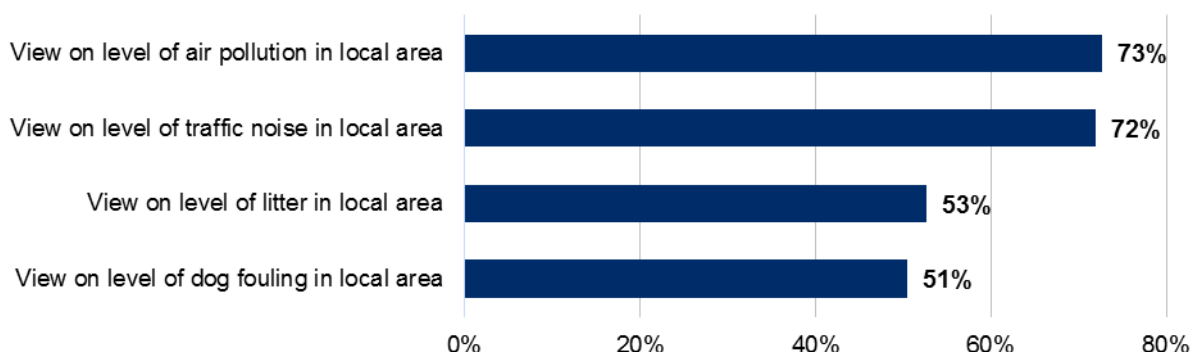
In general, parents were more content with primary than with secondary schools.

Parents agree that .....	Primary school	Secondary school
... their child is <b>happy at school</b>	<b>94%</b>	<b>80%</b>
... the school <b>prepares</b> their child well for <b>next stage of education</b>	<b>89%</b>	<b>76%</b>
... the school <b>encourages</b> their child to reach their <b>full potential</b>	<b>89%</b>	<b>78%</b>
... the school <b>helps</b> their child develop into a <b>well-rounded</b> individual	<b>94%</b>	<b>80%</b>
... the <b>standard of teaching</b> at child's school is high	<b>89%</b>	<b>76%</b>

## Local environment

A set of questions on how much people **value their local environment** was introduced in 2018-19. When answering, respondents were asked to consider their local area as anywhere within a **15-20 minute walking distance from home**.

**Chart 1: Satisfaction with conditions in local area**



Further questions were asked about areas of **green space**, other than their own garden, within the local area. Green space included public or open spaces like parks, allotments, children's play areas, forests, and riverside paths or beaches.

**84%** of people were satisfied with the quality of their local green space and **79%** agreed that it was well looked after. **91%** felt **safe walking alone** in their local green space and **78%** agreed that the green space was **suitable for children and young people**.

People were asked how their local green space had changed over the last three years: **20%** said it had got better, **65%** that it had stayed the same and **15%** that it had got worse.

## Recycling

**80%** of people were satisfied with the **recycling** service provided by their local council. When asked whether they felt their local council **kept them informed** about its recycling collection service overall **71%** of people agreed that they did. However, this varied across **local authorities**: from **61%** in Torfaen and Carmarthenshire agreeing they were kept informed, to **90%** in Conwy.



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. **71%** of people said they had donated second-hand items to charity shops and **46%** had sold or given items to friends / neighbours / family. **36%** of people had bought second-hand goods from a charity shop and **26%** had bought from websites (e.g. Ebay and Gumtree). **43%** of people had **not bought or received** any second hand goods or items in the past year.

## Deprivation

**14%** of **adults** in Wales were classified as **materially deprived**<sup>1</sup>, (that is, not able to afford basic things like keeping the house warm). Adult deprivation has decreased from **16%** in 2017-18.

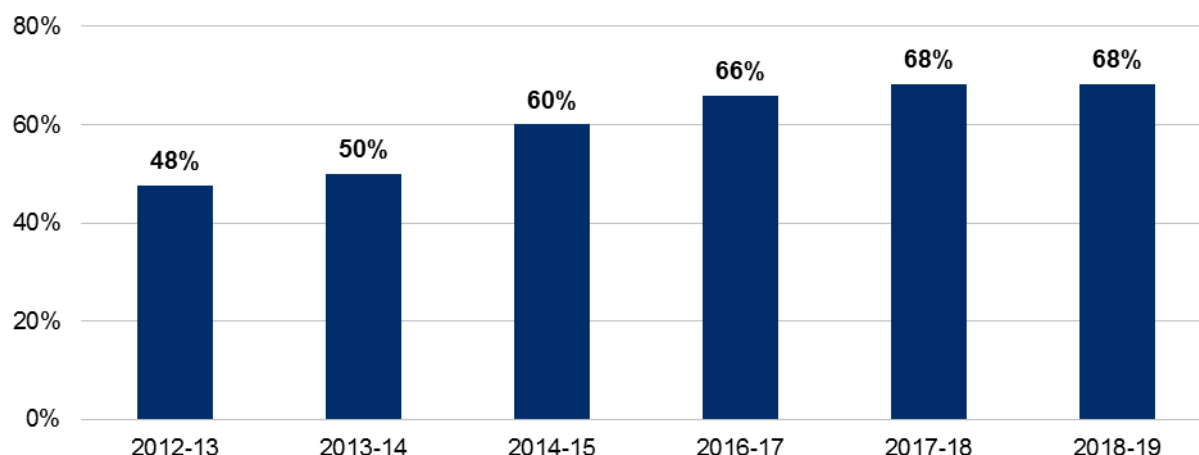
**17%** of **non-pensioner** adults and **5%** of **pensioners** were materially deprived, whilst **6%** of parents had materially deprived **children**.

**68%** of people said they have **no difficulties keeping up with bills and credit commitments**.

This proportion has risen since the question was first included in 2012-13 but has remained constant over the past three years (Chart 2) .



<sup>1</sup> National well-being indicator 19. More detail on how material deprivation is calculated can be found in the bulletin published on [Poverty](#) based on 2017-18 results .

**Chart 2: Ability to keep up with all bills and commitments without difficulty, by year**

The ability to keep up with bills and credit commitments also varies across age groups. In 2018-19, **84%** of people aged 65 and over had no difficulty, compared with **58%** of those aged 25 to 44.

People were also asked some questions about their **ability to afford food**<sup>2</sup>.

- **1%** said they cannot afford to **eat meals with meat, fish (or a vegetarian equivalent)** at least every other day.
- **9%** said that there had been at least one day in the previous fortnight when they had to **go without a substantial meal** due to lack of money.
- **3%** said that they had received food from a **food bank** in the last 12 months.

## Access to services and facilities

People were asked about the facilities and services (like shops, parks, schools and GP surgeries) that are within 15 to 20 minutes' walking distance from their homes. Overall, **69%** were satisfied that **good services and facilities** are available in their local area, but **3%** said that there were **no services or facilities** in their area.



**80%** were satisfied with their ability to get to or access the facilities and services they needed.<sup>3</sup>

<sup>2</sup> In 2018-19, an experiment was carried out using these three questions to determine whether people answered differently if asked face-to-face compared with self-completion on the interviewer's laptop computer. For each question a higher proportion of people who self-completed said they struggled with their ability to afford food compared with the proportion of people who answered the interviewer face-to-face. The self-completion figures are used in this release.

<sup>3</sup> National well-being indicator 24.

## Sense of community

The National Survey is used to measure progress against the Future Generations goal to achieve a 'Wales of cohesive communities ... attractive, viable, safe and well-connected communities'.



The National Survey found that, when people were asked to think about their local area:

- **72%** felt like they **belong**;
- **76%** felt that people from **different backgrounds get on well together**; and
- **76%** felt that people **treat each other with respect and consideration**.

All three of these figures remain much the same as when the questions were last asked in 2016-17. In 2018-19, **52%** of people agreed with all three statements.<sup>4</sup> Agreement with this combined measure increases with age.

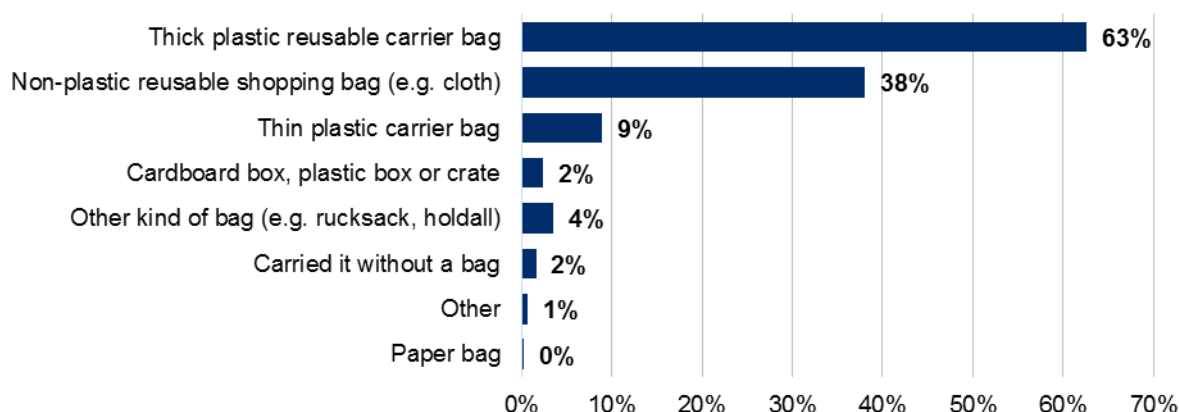
**97%** felt **safe at home** after dark, **81%** felt safe **walking alone** in local area after dark, **79%** felt safe when **travelling by public transport** after dark, and **97%** felt safe **travelling by car** after dark. **71%** felt safe in all four situations<sup>5</sup>.

**85%** were **satisfied with their local area** as a place to live.<sup>6</sup> People in rural areas were more satisfied with their local area than people in urban areas.

## Use of carrier bags

A new set of questions about **reusable carrier bags** was introduced in 2018-19. **57%** of people said they had made a **shopping trip** for food and groceries in the last week that needed more than two full carrier bags of shopping. Chart 3 shows that **63%** of people used a **thick plastic reusable carrier** bag for this type of shopping trip.

**Chart 3: Types of bag used to carry shopping home after large food & grocery trip**



**Note:** Respondents could list more than one type of bag, so results sum to over 100%.

<sup>4</sup> National well-being indicator 27.

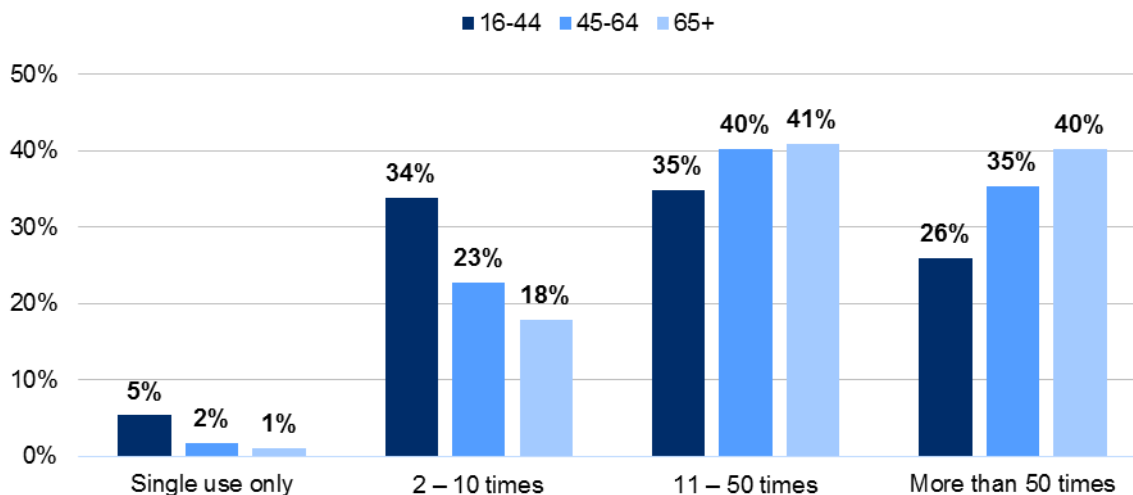
<sup>5</sup> National well-being indicator 25.

<sup>6</sup> National well-being indicator 26.



Further questions were asked about the types of bag people used for **non-grocery** shopping and whether they reused these bags. Everyone who had used a thick plastic bag for any type of shopping trip was asked how many times, on average, they **re-use** one of these bags. Chart 4 shows that the frequency of reuse varies by age group; **26%** of **16 to 44** year olds use a bag more than 50 times compared with **40%** of people aged **65 and over**.

**Chart 4: Frequency of re-use of thick plastic carrier bags, by age group**



## Lifestyle behaviours

The National Survey includes questions about the following five lifestyle behaviours.<sup>7</sup> There was no significant change in the results for any of the 5 behaviours between 2016-17, 2017-18 and 2018-19.



**17%** of adults reported that they **currently smoke**. Smoking was more common for those in materially deprived households, and less common among people aged over 75.



**18%** were found to **drink more than the weekly guideline** amount (average weekly consumption above 14 units). Drinking above weekly guidelines was more common among men and the middle aged.



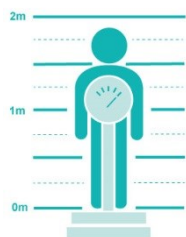
**24%** ate at least the guideline amount of **five portions of fruit or vegetables** the previous day. People who were materially deprived were less likely to do this.

<sup>7</sup> 1) Not smoking, 2) Not drinking above weekly guidelines 3) Eating five or more portions of fruit and vegetables the previous day 4) Being physically active for at least 150 minutes in the previous week, and 5) maintaining a healthy weight.



**53%** met the guideline amount of **150 minutes' activity** in the previous week.

Men were more likely to have done so than women. **33%** were inactive (active less than 30 minutes the previous week). Inactivity was highest among older adults (aged 75 or over) and those who were materially deprived.



**59%** were **overweight or obese**; **23%** were **obese**. Men were more likely to be overweight or obese (66% of men) than women (52%). Obesity was most prevalent for those aged 45 to 74.

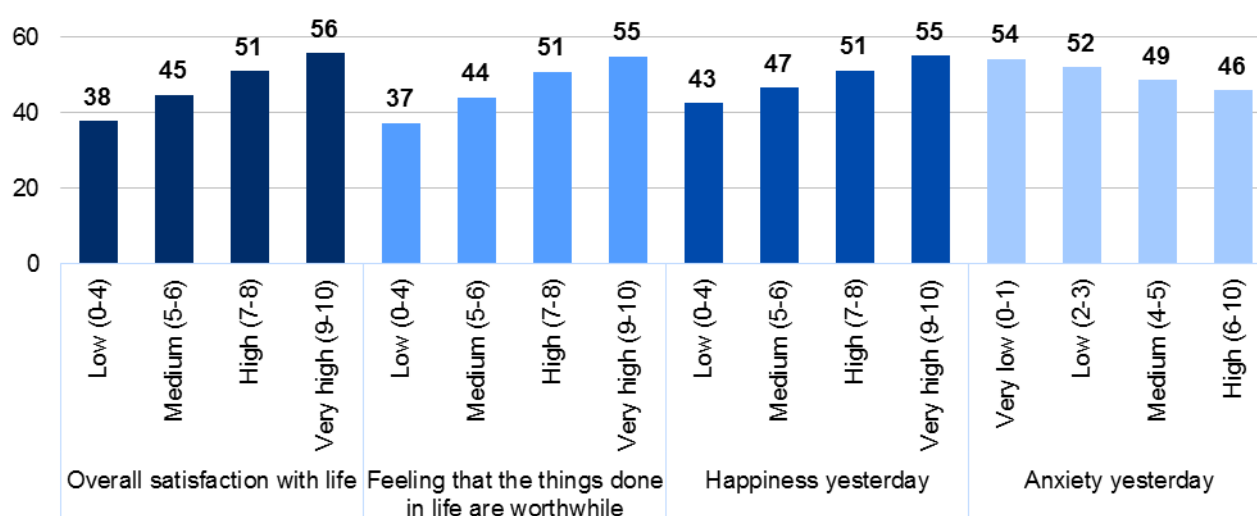
**26%** of adults reported **four or five** of the **healthy lifestyle behaviours** (not smoking, not drinking above guidelines, eat 5 fruit or veg, active, healthy weight); whilst **10%** reported **fewer than two of the five healthy lifestyle behaviours**.<sup>8</sup> These results remain unchanged from 2016-17 and 2017-18.

**72%** of adults said they are in **good or very good health**.

## Personal well-being

To assess **mental well-being**<sup>9</sup>, respondents were given 14 statements such as “I’ve been feeling relaxed”, and “I’ve been thinking clearly”. They were asked to score how often they felt this way on a five point scale, where 1 was ‘none of the time’ and 5 ‘all of the time’. An overall score (from 14 to 70) was subsequently calculated. The average total score was **51**.

**Chart 5: Mental health score, by subjective well-being**



<sup>8</sup> National well-being indicator 3.

<sup>9</sup> National well-being indicator 29. This is calculated using [the Warwick-Edinburgh Mental Well-being Scale](#)



There was a clear relationship between people's mental well-being and other measures of **subjective well-being**. Chart 5 shows that, in general, people who were **satisfied with their lives**, who felt the **things they did in life were worthwhile**, and who were **happy** and **less anxious** had higher mental health scores.

## Sport participation and latent demand

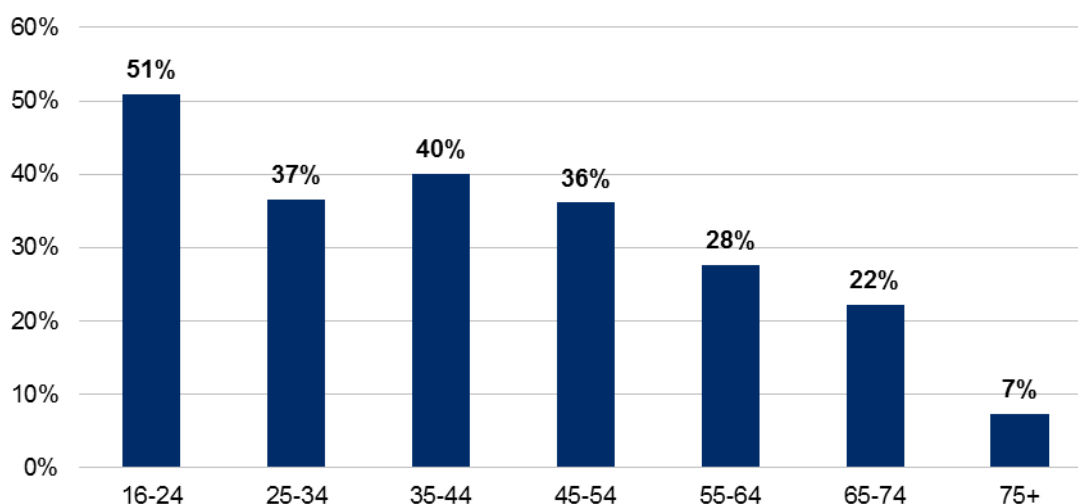
In order to monitor adult participation in sport, the National Survey includes a set of questions asked on behalf of [Sport Wales](#).



**59%** of people had participated in some sport or physical activity in the past 4 weeks. By far the most commonly-reported such activity was to have **walked more than 2 miles (35% of people)**, followed by attending the **gym or fitness classes (16%)**, **indoor swimming (11%)** and **jogging (10%)**.

**10%** of adults **participated** in a sporting or physical activity **around once a week**, **8%** participated **twice a week**, and **32%** at least three times a week.<sup>10</sup>

**Chart 6: Participating in sport / physical activity three times a week or more, by age**



The proportion participating in sport three times a week or more varied by age, from **51%** of those aged 16-24 to **7%** of those aged 75 or over as shown in Chart 6.

People were also asked whether there were any sports they would like to do, or to do more of. **50%** said they wanted to do more sport or physical activities with **14%** wanting to do indoor swimming and **9%** a gym or fitness class.

<sup>10</sup> National well-being indicator 38.

## Arts and cultural activities



People were asked about visits to **arts and cultural events** in the last 12 months and also whether they had actively taken part in any such activities during their leisure time. New questions were asked in 2018-19 to understand **what prevented** people going to or taking part in arts events or activities, and also to learn about people's attitudes to arts and culture.

**78%** of people said they agreed that it is right that there should be **public funding** of arts and cultural projects, and **85%** of people agreed that arts and culture make Wales **a better place to live** in. **61%** agreed that arts and cultural activity helped to enrich the quality of their life.

**39%** said they had **less money** to spend on leisure than they had a year ago, whilst **46%** said it was **difficult to find the time** to take part in or attend arts and cultural activities. **74%** of parents said they wanted their **child to go** to arts events and to take part in arts activities.

**12%** of adults who had visited a museum, attended an arts event, or actively participated in an arts event, during the last year, said that at least one of these events had been in the **Welsh language**.

## Welsh language

The [Census](#) is the main source of information about the proportion of people who can speak Welsh; the National Survey is used to monitor the trend for adults in-between Censuses.

In the National Survey, **18%** of adults aged 16 and over reported that they can **speak Welsh**. **11%** reported that they **can speak more than a few words of Welsh and also speak it every day**.<sup>11</sup>

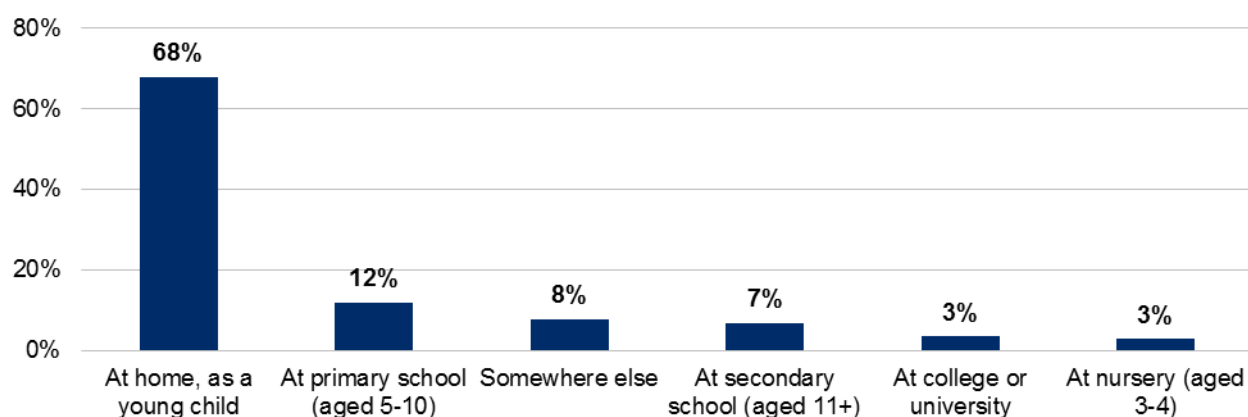


In 2018-19 a set of questions was introduced to ask people in work, who had some Welsh speaking ability, about their use of **Welsh in the workplace**. **72%** of this group said they had Welsh-speaking colleagues at work and **60%** of these said they **spoke Welsh** with at least some of these **colleagues**.

**31%** of employees reported that their employer offered them the **opportunity to learn Welsh**.

Questions about **where people learnt to speak Welsh** were also asked for the first time in 2018-19. Of those adults who have some spoken Welsh ability, **33%** gained this mainly as a **young child at home**, **23%** said they mainly learned at **secondary school** and **20%** learned at **primary school**. Chart 7 shows that over two thirds (**68%**) of adults who can speak more than a few words of Welsh and also speak it every day learned at home as a young child.

<sup>11</sup> National well-being indicator 36.

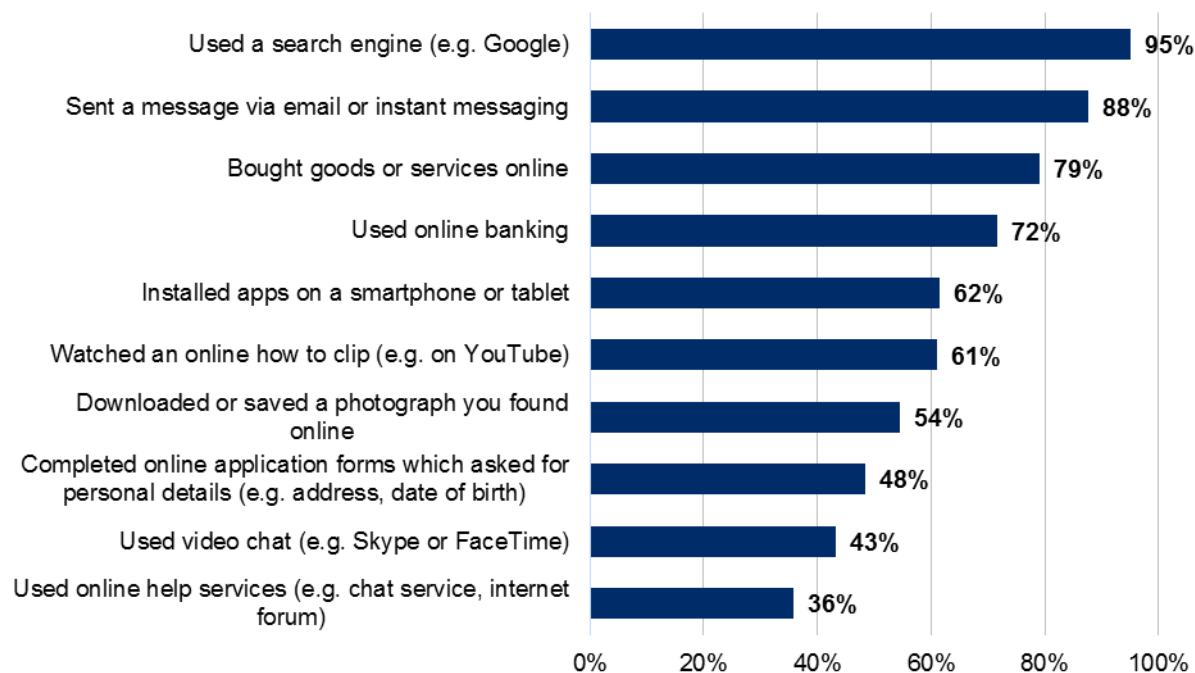
**Chart 7: Proportion of daily Welsh speakers<sup>12</sup> by where they learned to speak Welsh**

## Internet use

**87%** of households had access to the internet at home. People were also asked whether they **personally use the internet** at home, work or elsewhere. **89%** of adults aged 16 and over said they use the internet. This has increased from 77% in 2012-13.



As shown in Chart 8, **95%** of internet users had used a **search engine** (e.g. Google) in the last three months, **72%** used **online banking** and **43%** some form of **video chat**.

**Chart 8: Activities undertaken by internet users in last three months**

<sup>12</sup> National well-being indicator 36.

## Key quality information

### Background

The National Survey for Wales is carried out by the Office for National Statistics on behalf of the Welsh Government. The results reported in this bulletin are based on interviews completed between 1 April 2018 and 31 March 2019.

24,762 addresses were chosen randomly from the Royal Mail's Small User Postcode Address File. Interviewers visited each address and randomly selected one adult (aged 16+) in the household. They then carried out a 45-minute face-to-face interview with them, covering a range of views, behaviours, and characteristics. A total of 11,922 interviews were achieved with a response rate of 54.2%.

More information on the method is available in the [technical report](#).

### Interpreting the results

Figures quoted in this bulletin are based on only those respondents who provided an answer to the relevant question. Some topics in the survey were only asked of a sub-sample of respondents and other questions were not asked where the question was not applicable. Missing answers can also occur for several reasons, including a refusal or an inability to answer a particular question.

Where a relationship has been discussed 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, or if other factors are actually more important.

The results are weighted to ensure that the results reflect the age and sex distribution of the Welsh population.

### 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.

### National Statistics status

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 Statistics](#).

National Statistics status means that official statistics meet the highest standards of trustworthiness, quality, and public value.

All official statistics should comply with all aspects of the Code of Practice for Statistics. They are awarded National Statistics status following an assessment by the UK Statistics Authority's regulatory arm. The Authority considers whether the statistics meet the highest standards of Code compliance, including the value they add to public decisions and debate.

It is Welsh Government's responsibility to maintain compliance with the standards expected of National Statistics. If we become concerned about whether these statistics are still meeting the appropriate standards, we will discuss any concerns with the Authority promptly. National Statistics status can be removed at any point when the highest standards are not maintained, and reinstated when standards are restored.

National Statistics status means that our statistics meet the highest standards of trustworthiness, quality and public value, and it is our responsibility to maintain compliance with these standards.

The continued designation of these statistics as National Statistics was confirmed in 2017 following a compliance check by the Office for Statistics Regulation [[letter of confirmation](#)]. These statistics last underwent a full assessment [[full report](#)] against the Code of Practice in 2013.

Since the latest review by the Office for Statistics Regulation, we have continued to comply with the Code of Practice for Statistics, and have made the following improvements:

- provided more detailed breakdowns in the [Results viewer](#) and made it easier for users to compare results across years;
- updated the survey topics annually to ensure we continue to meet changing policy need; and
- made regression analysis a standard part of our outputs to help users understand the contribution of particular factors to outcomes of interest.

## Well-being of Future Generations Act (WFG)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10) (1) of the Act, the Welsh Ministers must publish indicators (“national indicators”) for the purpose of measuring progress towards the achievement of the Well-being goals.

The National Survey collects information for 15 of the [46 indicators](#), 11 of these are reported on here:

- |    |   |
|----|---|
| 3  | Percentage of adults, who have fewer than two healthy lifestyle behaviours (not smoking, healthy weight, and meet guidelines on fruit and vegetables, drinking, and physical activity). |
| 19 | Percentage living in households in material deprivation.  |
| 23 | Percentage who feel able to influence decisions affecting their local area.   |
| 24 | Percentage satisfied with their ability to get to/ access the facilities and services they need.  |
| 25 | Percentage feeling safe at home, walking in the local area, and when travelling.  |
| 26 | Percentage satisfied with local area as a place to live.  |
| 27 | Percentage agreeing that they belong to the area; that people from different backgrounds get on well together; and that people treat each other with respect.                           |
| 29 | Mean mental well-being score.   |
| 36 | Percentage who speak Welsh daily and can speak more than just a few words of Welsh.   |
| 37 | Percentage of people who can speak Welsh.   |
| 38 | Percentage participating in sporting activities three or more times a week.   |

Results for these indicators are available as open data on [StatsWales](#). Information on the indicators, along with narratives for each of the well-being goals and associated technical information is available in the [Well-being of Wales report](#).

This release includes one contextual indicator, namely, the 'percentage of people who can speak Welsh.' which was referenced in the technical document or the Well-being report in the previous link.

Further information on the [Well-being of Future Generations \(Wales\) Act 2015](#).

The statistics included in this release could also provide supporting narrative to the national indicators and be used by public services boards in relation to their local well-being assessments and local well-being plans.

## **Further details**

The document is available at:

<https://gov.wales/national-survey-wales>

## **Next update**

This release presents a small selection of results. There will be a number of more detailed, topic-specific outputs published throughout the year.

## **We want your feedback**

We welcome any feedback on any aspect of these statistics: email [surveys@gov.wales](mailto:surveys@gov.wales)

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