

Strictly Confidential

PUBLIC OPINION ON THE BRITISH COUNTRYSIDE

ORB INTERNATIONAL



6TH JUNE 2023



OVERVIEW

1.

Britons are highly proud of the countryside, citing that it improves mental and physical health...

...but some feel that a lack of transport links and high transport costs are a barrier to making it accessible for all.

2.

The rural and urban populations are largely aligned on the major issues facing the countryside, particularly on overdevelopment.

Again, both are aligned on agreeing that young people should be educated on the countryside struggles, especially with farming.

3.

The rural population feel that they have no voice and that political decisions are urban or London-centric.

Having a well-known spokesperson that represents the needs of rural communities is essential to tackling challenges in the countryside.

4.

Almost all feel that it is important to protect the countryside but are pessimistic that the leading political parties will do so.

Petitioning development, supporting farmers, and education are perceived as the best ways to protect.

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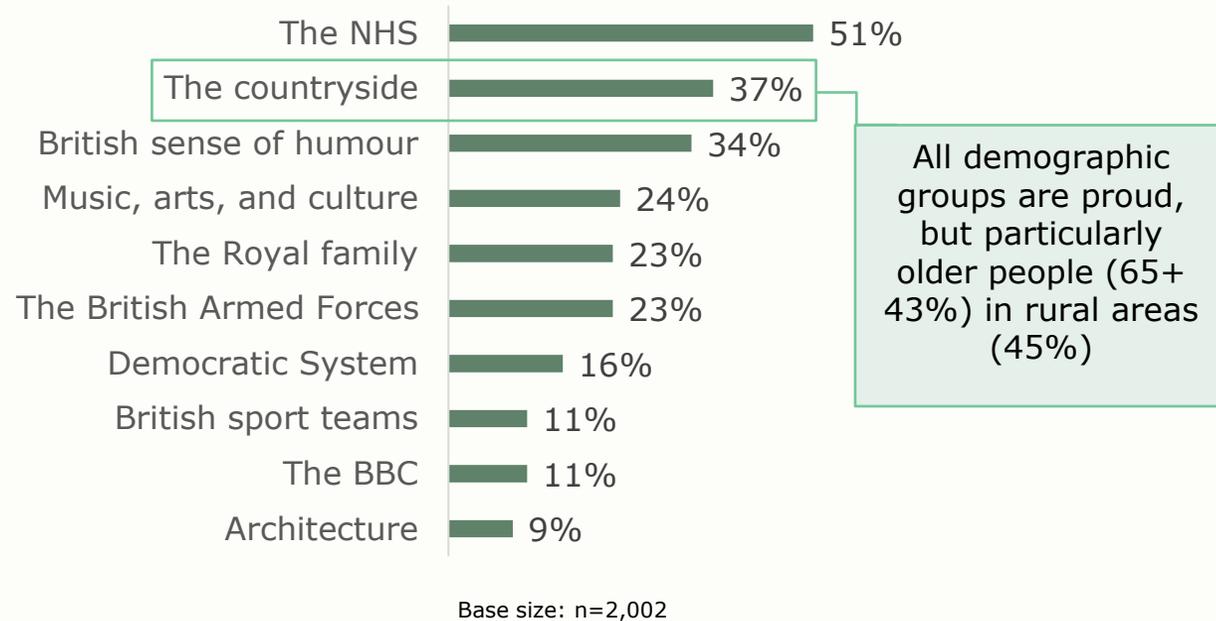
01. PERCEPTIONS OF THE BRITISH COUNTRYSIDE



BRITONS ARE HIGHLY PROUD OF THE BRITISH COUNTRYSIDE, 2ND ONLY TO THE NHS

Those aged 65+, and those that live in or regularly visit the countryside are significantly more proud.

What makes you most proud to be British?



93%

Believe that the British countryside should be regarded as part of our national heritage.

Base size: n=2,002

Rural participant :

“It's definitely something I'm proud of...there's a strong sense of that...When friends visit from cities or abroad, I like to show it to them.”

NOT ONLY IS THE BEAUTY OF THE COUNTRYSIDE APPRECIATED, BUT VISITING IS SAID TO HELP IMPROVE PHYSICAL AND MENTAL HEALTH...

Reasons for visiting the countryside



Base size: n=2,002

Words associated with the British countryside



Rural participant :

“The pandemic showed how important [the countryside] was for everyone’s mental health...as soon as we were released [from lockdown] everyone flooded to it”

THE MOST COMMON FEELINGS WHEN SPENDING TIME IN RURAL AREAS ARE RELAXED AND HAPPY, WHEREAS IN URBAN AREAS THEY ARE ANXIOUS AND INDIFFERENT

Top 3 feelings when spending time in **rural** areas

Top 3 feelings when spending time in **urban** areas



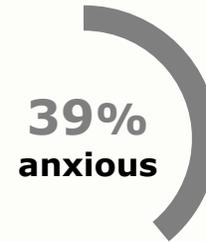
Vs 17% in urban areas



Vs 24% in urban areas



Vs 10% in urban areas



Vs 3% in rural areas



Vs 5% in rural areas



Vs 26% in rural areas

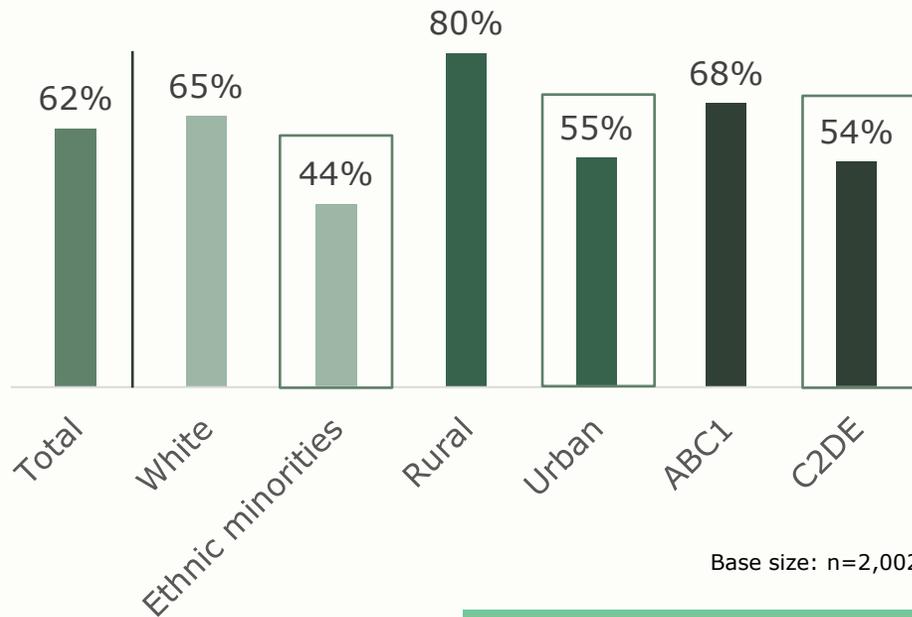
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...BUT TRANSPORT COSTS AND POOR LINKS ACT AS A BARRIER

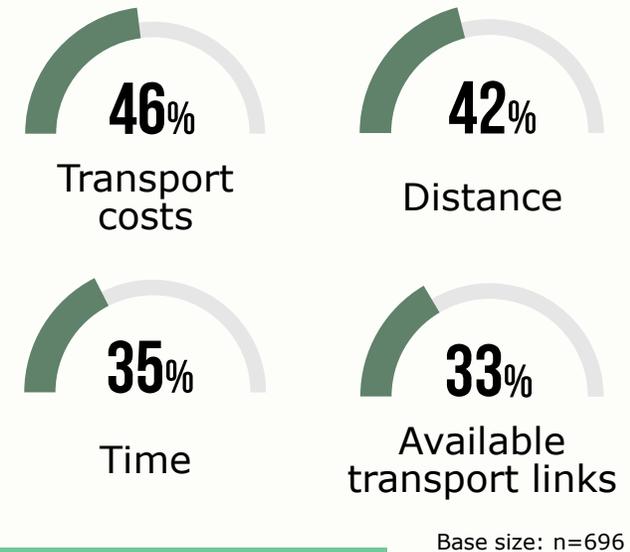
Those in lower social economic groups, ethnic minorities, and those in urban areas are the least likely to visit the British countryside at least monthly

Over a third (35%) feel that there are barriers to visiting the British countryside, this increases to 43% in ethnic minorities and 46% in those aged 18-24.

Visit the countryside at least monthly



Barriers to visiting the countryside (those who feel there are barriers)



Urban participant :

“You couldn't really get there by a coach...and I don't think they've got a train station near them...Accessibility is difficult in some circumstances and it's expensive as well.”

“I DON’T GO TO THE COUNTRYSIDE ENOUGH, BUT WHEN I DO, IT’S JUST THE QUIET. IT’S JUST THE BIRDS AND NOT THE HUSTLE AND BUSTLE AND JUST GETTING ON THAT TRAIN AND SEEING THE GREENERY FOR MILES...JUST GET A SENSE OF CALM.”

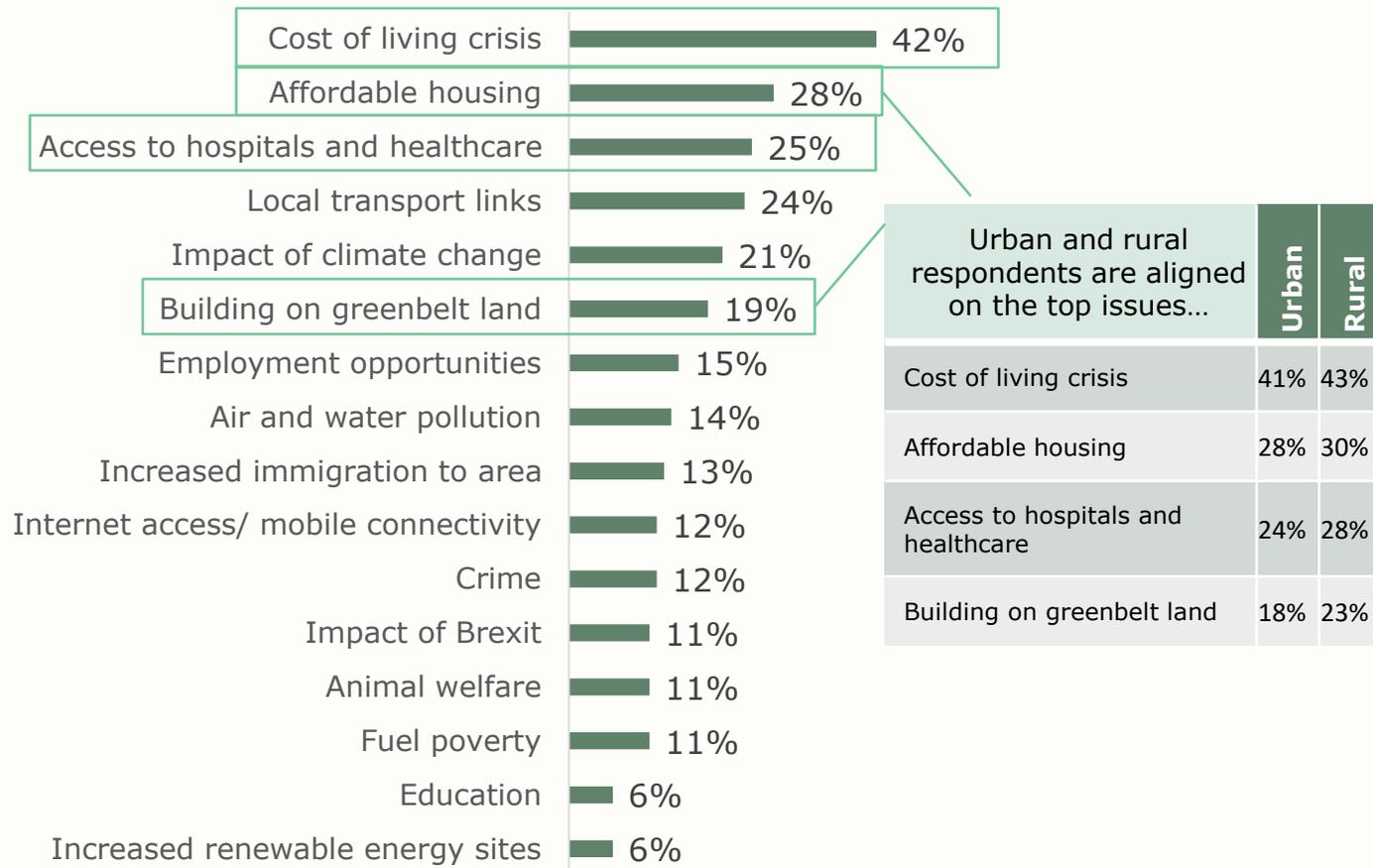
- Urban focus group participant

02. UNDERSTANDING OF LIFE IN THE BRITISH COUNTRYSIDE



THE PUBLIC ARE DIVIDED ON WHAT THE MOST IMPORTANT ISSUES IN THE COUNTRYSIDE ARE, BUT DIFFERENCES BETWEEN RURAL AND URBAN POPULATIONS ARE MINIMAL

Most important issues affecting rural populations that need to be addressed by political parties



Urban and rural respondents are aligned on the top issues...

	Urban	Rural
Cost of living crisis	41%	43%
Affordable housing	28%	30%
Access to hospitals and healthcare	24%	28%
Building on greenbelt land	18%	23%

Rural communities think that urban dwellers don't relate to their issues, but this is a misconception

"We were brought up in that environment...they weren't brought up in the countryside...They think they can wander across all the fields with the right to roam." - rural

"Agriculture has to work really hard now ... as a country, we are destroying a lot of the natural wildlife and causing problems" - urban

In 2017, access to healthcare and transport links were perceived to be more important issues than housing, showing that access to affordable housing is an increasing concern

1. Access to hospitals and healthcare ↓
2. Local transport links ↓
3. Affordable housing ↑

QUALITATIVE INSIGHTS SHOW THAT THE PUBLIC FEEL THAT FARMERS IN THE UK ARE STRUGGLING DUE TO A LACK OF GOVERNMENT SUPPORT

1.



Farmers are perceived to be struggling financially. They are unable to match prices of imported produce due to a lack of government subsidies and supermarkets are underpaying for their produce, forcing them to give up and sell their land to development.

2.



Farmers are perceived to be feeling the impact of Brexit, be it due to increasing difficulties to sell produce abroad, a lack of affordable labour helping with crops, or a decrease in EU funded subsidies.

3.



The general population are not perceived to understand the difficulty and importance of farming. Especially, smaller farms are overwhelmed, being dependent on environmental conditions and large corporations, and being easily priced out by larger farms.

"[W]e import a lot of foods from abroad because it's cheaper now. If there was more support for farmers and local producers...then I'm sure the price wouldn't be as drastically different, [helping farmers]."
– rural

"...there's no money in farming and therefore they're selling their land." – rural

"...since we've had all these EU situations and trucks not being able to get to certain places [farmers] were losing out. [Y]ou need the trucks to move the stuff if you're trying to sell abroad...[and] the whole thing collapsed. So, farmers weren't getting as good a deal as they [were] getting before, apparently." – urban

"[Farmers] don't have it as easy as we all think they do. [T]he stuff they sell to the supermarkets,...they don't get as much money as you think Supermarkets, as we all know, are big bobs, aren't they? – urban

"I didn't realise that farmers were working 24/7 at certain times of the year. [T]hat whole management of the land and landscape, which is why everybody comes out there...from the cities is something to really be proud of." – rural

QUALITATIVE INSIGHTS SUGGEST URBAN AND RURAL COMMUNITIES WANT TO UNDERSTAND AND RESPECT EACH OTHER. EDUCATE IN AN ENTERTAINING SETTING

What do the public think would help unite rural and urban communities

Break down the stereotype that everyone in the countryside is wealthy – poverty is present in the countryside too

Improving public transport links in rural areas, and reducing public transport costs – makes the countryside more accessible to all

Use social media to engage young people – educate on life in the British countryside and showcase what it has to offer

More TV shows like Clarkson's Farm that educate people on the reality of countryside life in an entertaining way

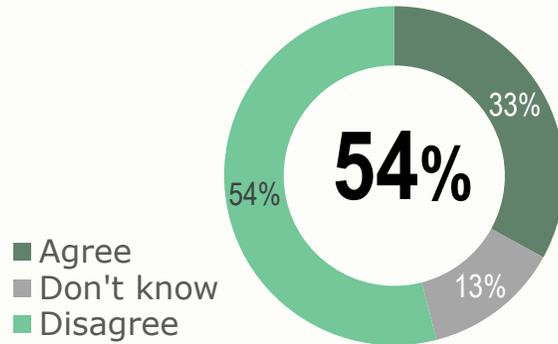
Rural participant :

"So starting from a young age and then all the way through in their education, you feel like there should be some sort of integration into getting people out into the countryside."

03. VOICES FOR THE BRITISH COUNTRYSIDE



THERE IS CONSENSUS ACROSS BOTH URBAN AND RURAL AREAS THAT COUNTRYSIDE ISSUES ARE NOT TAKEN SERIOUSLY ENOUGH IN POLITICS

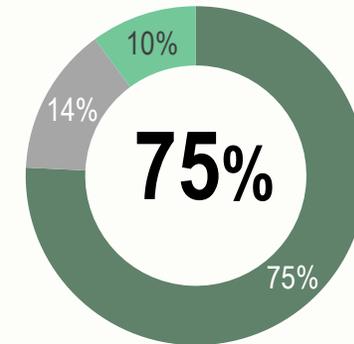


■ Agree
■ Don't know
■ Disagree

Base size: n=2,002

Over half (54%) disagree that problems in the British countryside are taken seriously by the UK government

...and three quarters (75%) agree that the British countryside should be the subject of increased political debate



■ Agree
■ Don't know
■ Disagree

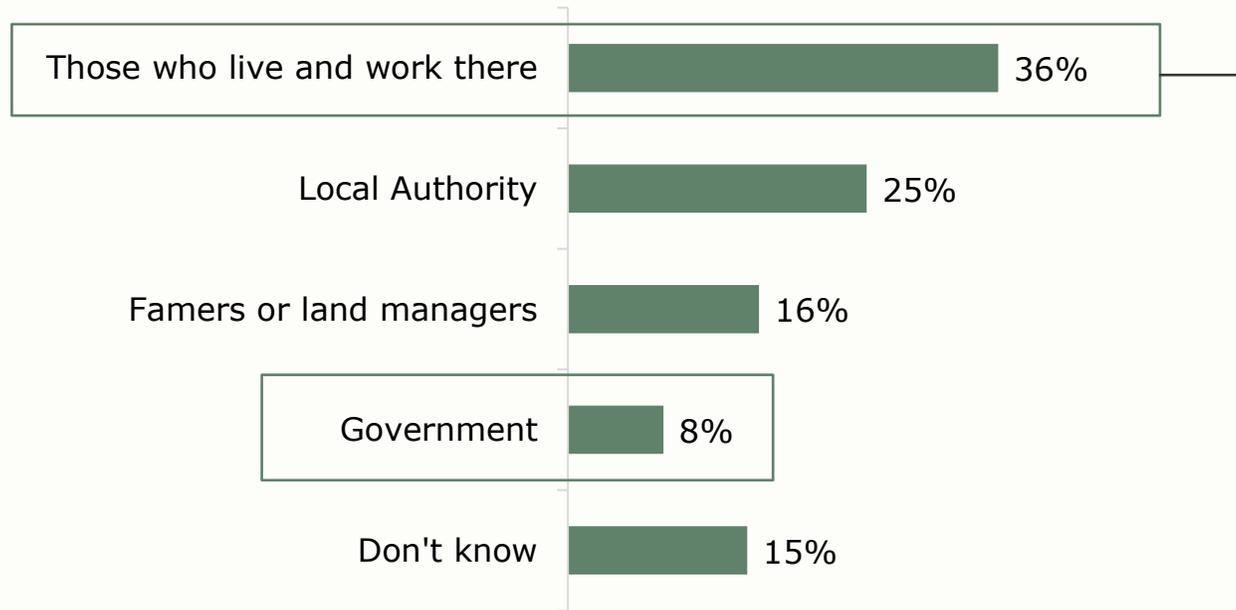
Base size: n=2,002

Rural participant :

“A lot of people in government don't realise we have a different subculture in the countryside. I think that's key”

AND FEEL THAT THE COUNTRYSIDE SHOULD BE RUN BY THE PEOPLE LIVING THERE RATHER THAN LONDON-BASED POLITICIANS

Who should run the British countryside (%)



Base size: n=2,002

Rural participant:

"I think that would be a great idea [to have a] rural minister...moving some of the power to the different provinces would give a much wider range for them to actually evaluate and you know, implement certain ideas and everything to help the whole country, not just London and the overspill."

Significantly more respondents over 55 think those that live and work there should run it (55-64 43%, 65+50%), and those that voted conservative in 2019 but won't in the next election (40%)

“I THINK WE ALL ACCEPT THAT WE HAVE A LONDON-BASED GOVERNMENT AND MEDIA. SO...THE WAY PEOPLE LIVE DOWN THERE, THEY ALL CONSIDER THAT NORMAL AND THAT GETS PERPETUATED THROUGHOUT POLICY...WE HAVE TO ACCEPT WE ARE A VERY IMPORTANT MINORITY.”

- Rural focus group participant

MOST FEEL THAT THERE IS NOT A GOOD SPOKESPERSON FOR THE COUNTRYSIDE



Do not think there is a public figure that can be considered as a spokesperson for the countryside

Base size: n=2,002

Who should take this role?

Alan Titchmarsh Michaela Strachan Kaleb Cooper (Clarkson's Farm)
Monty Don David Attenborough
Jeremy Clarkson Countryfile presenters Piers Morgan
Matt Baker King Charles Chris Packham

Whilst those in urban areas praised mainstream programmes like Countryfile and Springwatch, some rural participants slated these programmes for being afraid to show the true reality of rural life, such as farming struggles

...AND THAT WHOEVER TAKES THE ROLE SHOULD BE ACCUSTOMED TO CONTROVERSY

1. Somebody respected in the countryside, who will stand up for them in central government
2. Someone 'controversial', as it is perceived they would come under fire for defending the traditional countryside way of life
3. Someone in TV/media with connections to the countryside e.g., Jeremy Clarkson with Kaleb

Rural participants:

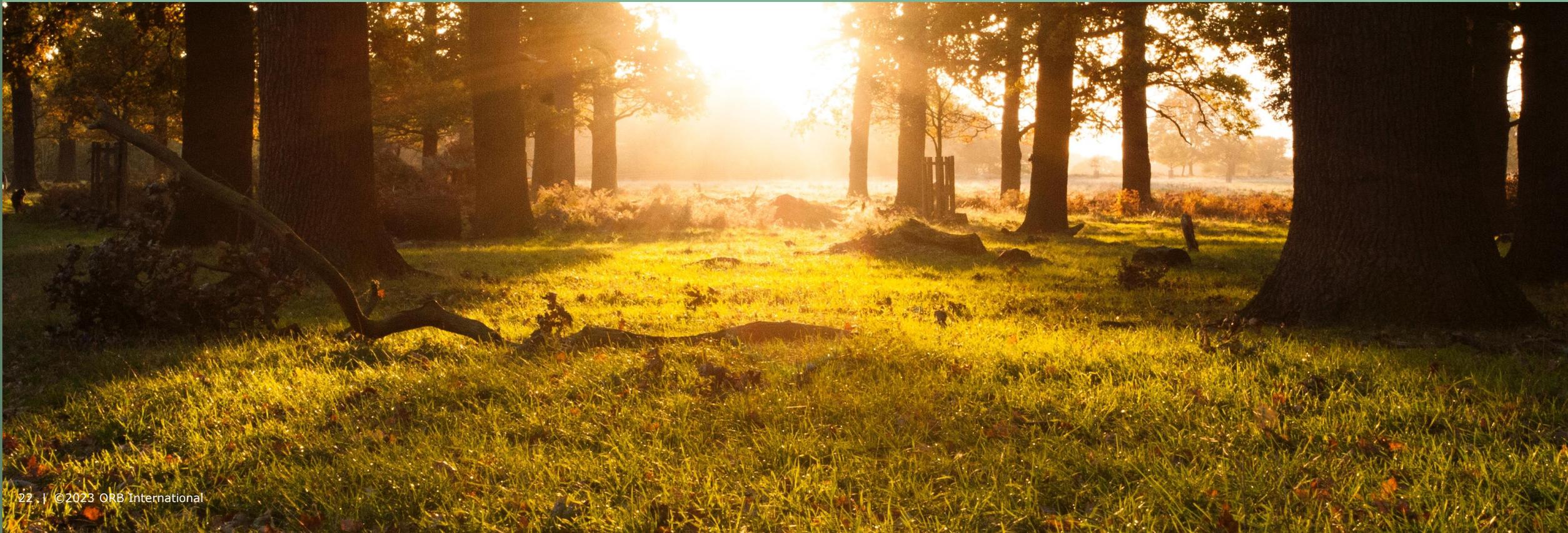
"Somebody who carries some weight in in the countryside and who's respected, whether that is whether a TV celebrity or somebody else who can then stand up and argue with central government."

"We wouldn't want it to be us versus them, you know, the city versus the country...at the start you would need somebody to unify because the city would be like well why are we doing this for the country."

"So it has to be someone controversial...to whack away people to speak, because whoever it is would come under quite a bit of fire...somebody like [Clarkson] who can deal with the pressure."

"[Clarkson's Farm] has been a great eye opener... a lot of my friends from cities...had no idea...And I'm like, well, that's just everyday in the country, mate."

04. THE FUTURE OF THE BRITISH COUNTRYSIDE AND PROTECTION



THE PUBLIC ALMOST UNANIMOUSLY THINK IT IS IMPORTANT TO PROTECT THE COUNTRYSIDE, BUT ARE NOT OPTIMISTIC THAT THE CONSERVATIVE OR LABOUR PARTY WILL DO SO

95%
think that it is important to
protect the countryside



Base size: n=2,002

...but just 1 in 10 think that the conservative party (9%) or labour party (11%) will prioritise and protect the countryside



Base size: n=2,002

Rural participant :

“I'm very worried about what Labour are planning to do if they get in, they want to relax all the Greenbelt planning permission laws.”

SUPPORTING LOCAL BUSINESSES AND FARMERS, AND STOPPING OVERDEVELOPMENT, ARE PERCEIVED AS THE BEST METHODS FOR PROTECTION

What do the public think would help protect the countryside in the future?

'Pouring love' into local businesses – shop locally



Support farmers – educate on the benefits of fresh British produce



A voice for the people of the countryside



Educating people on respecting the countryside when visiting



Educating young people on the ways of life of the countryside



Writing to MPs and signing petitions to stop overdevelopment



Vote for the party that is thinking about the countryside communities



Government investment and attention



“I THINK PEOPLE FROM CITIES ARE STARTING TO UNDERSTAND MORE AND HOPEFULLY THE EDUCATION WILL KEEP GROWING. SO I'M HOPEFUL, BUT I THINK IT WILL CHANGE AND WON'T BE THE COUNTRYSIDE AS WE KNOW IT NOW.”

- Rural focus group participant

THANK YOU. FOR MORE INFORMATION...

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