Isle of Man Government
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Isle of Man Social Attitudes Survey 2017

Economic Affairs

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Social Attitudes Survey 2017: Executive Summary

An estimated 86% of residents are 'satisfied' or 'very satisfied' with life on the Isle of Man, and 79% would recommend it to others as a place to live. Residents feel that the best things about living here are safety and low crime, the clean natural environment, and the Island culture and sense of community. The high cost of living, particularly the cost of travelling off-island, is most frequently described as the worst feature of Island life.

The 2017 Social Attitudes Survey shows public confidence in Government and Parliament remain low in comparison with other public institutions and services, but higher than one year ago. Civic engagement has risen in the past year, as greater proportions of people indicate that they have responded to Isle of Man Government consultations, that they know the names of their public representatives at all levels, and that they feel able to influence decisions affecting their local areas. However, a majority of the population (70%) still feel that Government policy is not clear, and more than half (53%) feel that the impact of Government policies upon their lives is negative.

40% of households in IOM have experienced at least two years of financial strain, and nearly the same proportion expect at least one more year of continued hardship. Large and unexpected household expenses are reported as less affordable than one year ago. The majority (63%) feel that wealth inequality is worsening on the Island, and the proportion of people holding this opinion has increased slightly over the past year.

Despite these challenges, a sizeable proportion of households express optimism for the future, dependent upon income level and perceived job security. 14% of respondents expect to buy a house or flat within the next five years, and a third of working residents are planning optimistically for early retirement. The majority (67%) do not feel that Brexit will leave the Island's economy worse off. A growing proportion (38%) feel that the Island's population should increase, and 46% feel that immigration improves the Island's quality of life. Overall, the Island ranks in the top 40 happiest countries when measured using the World Happiness Study methodology.

Table of Contents

Highlights

Social cohesion: 62% of respondents agree that 'most people can be trusted'. 97% feel 'fairly safe' or 'very safe' in their neighbourhoods at night. 80% of respondents feel 'close' or 'very close' to the Island – an increase of 30% in comparison to one year ago.

Birthplace: 44% of respondents were born in the Isle of Man, while 42% were born in England.

Marital status: More than half (56%) of respondents are married. 14% are cohabiting or in a civil partnership. 12% are either separated, divorced, or widowed, and 18% are single.

General health: Three-quarters (74%) of respondents have no lasting physical or mental health condition or illness, exactly the same proportion found in the 2016 Social Attitudes Survey one year previously. 76% describe their health as 'good' or 'very good', in comparison to 81% in England and Wales (2011) and 74% in Scotland (2015).

Employment and underemployment: 75% of respondents are employed: 58% full-time, 12% part-time, and 5% self-employed. 10% of full-time employees, 21% of part-time employees, and 27% of self-employed persons would like more hours of work. 9% of full-time employees and 18% of part-time employees feel that their jobs are not secure.

Household income: Median gross annual household income of respondents falls between £40,000 and £55,000.

Retirement: One in three working persons (32%) intends to retire before reaching state retirement age. 8% intend to leave the Island upon retirement.

Housing: One in three respondents (34%) own their home outright, and 42% carry a mortgage or home loan. Of respondents who own their home outright, one in four (24%) also own a second home, either on the Island, in the UK, or overseas. One in three respondents who are privately renting their house or flat expects to buy a house or flat in the next five years, compared to one in ten respondents who are publically renting their house or flat. Nearly one in five private renters expects to leave the Island in the next five years.

Care work and volunteering: 14% of respondents are caring for someone else. 33% have undertaken voluntary work in the past month.

Influencing decisions: 50% of respondents feel that they are 'sometimes' or 'always' able to influence decisions affecting their local area, up from 44% in 2016.

Confidence in public institutions: Island residents are slightly more confident in all public institutions than they were one year ago. Confidence is 98% in Emergency Services, 78% in Education Services, 62% in Health Services, 46% in Government, and 38% in Parliament.

Impact of Government policies: 29% of respondents feel that the Isle of Man Government has clear policies. 17% feel that Government policies have no direct impact on their lives, 53% feel that Government policies have negative impact, and 30% feel that the impact of Government policies is positive.

Satisfaction with public services: Respondents are most highly satisfied with Police Services (rated 3.1/4) and least satisfied with Utilities (rated 2.4/4). Across the Island, residents of Douglas are least satisfied with their utilities, where general satisfaction is 47%.

Consumer protection regulation: More than half (56%) of respondents feel that consumer protection regulation on the Island is effective or 'somewhat' effective.

Household financial optimism: While 42% of respondents feel that their household finances have been stable over the past year, 40% feel that their finances are 'worse' or 'significantly worse'. 43% anticipate no change to their financial situation in the next year, and more respondents anticipate household financial decline (32%) than improvement (23%). 26% of household find it 'quite difficult' or 'very difficult' to cope financially.

Brexit: 33% of respondents feel that the Isle of Man's economy will be worse off when Britain leaves the EU, and 26% feel that the economy will be not much different. 46% feel that Brexit will not affect immigration to the Isle of Man.

Immigration and population: 38% of respondents believe that the Isle of Man's population should increase, while 49% feel it should remain the same. 47% feel that immigration improves the Island's quality of life, while 25% feel that immigration makes the local quality of life worse.

Social equality: 39% of respondents feel that the Isle of Man has become more equal with regard to gender issues in the past five years, and 64% feel the Island has become more equal with regard to sexual orientation. However, 62% feel the Island has become more unequal with regard to wealth.

Life satisfaction: 86% of respondents are 'happy' or 'very happy' with the Isle of Man as a place to live. The average 'happiness score' on the Island is 6.43/10, compared to 6.7/10 for the UK. The 'best thing' about living on the Isle of Man is safety and low crime, while the 'worst thing' is the cost and inconvenience of travelling off-Island.

Recycling: 75% of respondents recycle one or more of glass, paper, plastic, and/or garden waste. The most significant barrier to recycling is a lack of kerbside collection service in certain areas of the Island.

Active transport: 21% of respondents walk to work 'daily', and 2% commute daily to work on a bicycle.

Satisfaction with sea and air links: 56% of respondents are 'dissatisfied' or 'very dissatisfied' with air and sea links from the Isle of Man.

Overview

Background

The purpose of public opinion survey is to collect sample information about social and political attitudes surrounding issues of public and national interest. Social attitudes research provides valuable feedback to government for performance evaluation, policy development, and future planning.

The Isle of Man Social Attitudes Survey (2016/2017) is an Isle of Man Government initiative to establish an annual survey that captures public opinion, and also provides feedback for several national indicators outlined in the Isle of Man Programme for Government *Our Island: A Special Place to Live and Work.*

This type of public opinion survey has been undertaken in the Isle of Man in the past. In 1991, and for a second time in 2002, the Isle of Man Government administered the Quality of Life Survey, which were studies of social attitudes and public opinions regarding life in the Isle of Man. These studies provide valuable historical and baseline information, and several questions from these earlier studies were revived in the 2017 Social Attitudes Survey.

Methodology

In 2017, the Cabinet Office commissioned the Island-based independent research agency Research Offshore to conduct the Social Attitudes Survey (hereafter **SA17**). Our thanks go to them for collecting the information provided.

The 2017 questionnaire was developed in consultation across multiple Government departments and Ministers in the Cabinet Office, and with close reference to baseline data on key measures collected by the 2016 questionnaire. In addition, similar instruments widely used elsewhere in the UK were reviewed, and every effort was made to collect data which could be meaningfully benchmarked to other recent regional surveys.

The Social Attitudes Survey was promoted from early May 2017 through the joint efforts of the Cabinet Office and Research Offshore, with the cooperation and support of local media. The survey was made available to the public in a multi-mode format, both online through a public link and through distribution of paper copies in public areas at:

- Isle of Man Government Offices, Douglas
- Douglas library
- Peel library
- Ramsey library
- Castletown Civic Centre

- The Job Centre
- Markwell House Social Security Office
- Age Concern Isle of Man

Economic Affairs would like to thank the above for their support in ensuring the survey reached as many people as possible.

In addition, Research Offshore made use of a proprietary distribution list of Isle of Man residents who were recruited directly through personal email addresses.

Response, Sampling and Weights

The structure of the sample was determined according to population data derived from the 2016 national census. Census data was used to estimate the distribution of the Island population by age, sex, and geography as follows:

Table 1: *Proportionate distribution of Island population, Census 2016*

Area	Percent		Age	Male	Female
Douglas	32%		18-34	11.2%	11.4%
East	20%		35-44	7.6%	8.0%
South	17%		45-54	9.9%	9.8%
North	16%		55-64	8.2%	8.3%
West	14%		65+	12.0%	13.6%

On the basis of the census distribution, a quota sample was constructed on a proposed sample of 500 respondents. Quota sampling is a non-probability stratified sampling technique: proportionate stratification by age and geography reduces variance and ensures that the sample is representative of population structure on these characteristics, but respondent self-selection within the cells of the frame necessarily introduces an element of statistical bias. As a consequence, the results presented in this report cannot necessarily be assumed to be a perfect representation of all Isle of Man individuals.

The final sample collected by Research Offshore was 1,888 respondents aged 18 to 89. This final sample met all pre-set quota counts in the sampling frame, and oversampling of individual quotas was balanced by post-hoc sample weighting, in order to redistribute the total sample in conformity with estimated population parameters.

Table 2: *Sample weights by age and sex, Social Attitudes Survey 2017*

Age Group	Males	Females
15-34	1.56	1.08
35-44	0.96	0.63
45-54	1.60	1.14
55-64	0.55	0.37
65+	2.55	2.89

In effect, this is the same as counting one 65+ female as 2.89 65+ females, as that sub-group was proportionately under-represented. Others, such as males aged 55-64, were proportionately over-represented in the total sample, and so responses were weighted at less than one.

In addition to males and females, the 2017 Social Attitudes Survey also included a third gender category for "Other". This measure for gender was previously field tested in the Isle of Man 2015 Youth Survey, and the formulation of the question drew upon published research as well as consultation with a local panel of experts. The expansion of gender categories in social survey is consistent with the Government's commitment to an inclusive and caring society. The proportion of respondents who described their gender identity as "Other" was low, and to protect the anonymity of all respondents, no analyses with the potential to identify any individuals will be made public or otherwise circulated. Since there currently exists no other population estimate for non-binary gender self-identification in the Isle of Man, this sub-sample of respondents was not weighted.

In some instances, analyses presented here rely upon low sample size, usually due to a relatively small number of respondents indicating a particular response. However, appropriate statistical significance testing has been applied to all bivariate and multivariate analyses where required. When any detail presented in this report is described as 'significant', this refers to statistical significance determined by testing. Some measures carry over from 2016 to 2017, and in most cases these repeat measures are presented without significance testing.

Notes

The SA17 survey was completed by Isle of Man residents aged 18 years and over (whereas last year's 2016 Social Attitudes Survey interviewed residents aged 16 years and over).

The measurement scale for gross annual household income was designed to capture specific 2017/18 taxation thresholds, in particular the Personal Allowance for single persons (£12,500) and the Income Tax Cap for single persons (£125,000). Beyond consideration of key taxation thresholds, gross annual household income was then broken into £15,000 increments.

All numbers are rounded to nearest integers.

Benchmarking and Sources

Where information regarding other jurisdictions is available, a comparison is sometimes made to help bring some context to the results. When referring to other jurisdictions the following sources of information have been used:

Jersey: Jersey Annual Social Surveys (http://www.gov.je/Government/JerseyWorld/StatisticsUnit/PeopleCommunities/Pages/Socialstatistics.aspx)

United Kingdom: British Social Attitudes Survey 2017 overview http://www.bsa.natcen.ac.uk/latest-report/british-social-attitudes-34/key-findings/context.aspx

British Social Attitudes Surveys http://bsa.natcen.ac.uk/

Attitudes to Mental Health in Scotland: Scottish Social Attitudes Survey 2013 http://www.gov.scot/Resource/0046/00463017.pdf

Under and Over Employment in the UK http://webarchive.nationalarchives.gov.uk/20160105160709/http://www.ons.gov.uk/ons/rel/lmac/underemployed-workers-in-the-uk/2014/rpt-underemployment-and-overemployment-2014.html

The Taking Part Survey: UK Department for Digital, Culture, Media, and Sport https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/586932/Taking_Part_2016-17_Q2_Report.pdf

Global: GESIS Leibniz Institute for the Social Sciences http://zacat.gesis.org/webview/index.jsp?object=http://zacat.gesis.org/obj/fStudy/ZA5950

World Health Organisation mental health wellbeing scores http://www.eurofound.europa.eu/surveys/data-visualisation/european-quality-of-life-survey-2012

World Happiness Report http://worldhappiness.report/wp-content/uploads/sites/2/2017/03/HR17.pdf

Definitions
Isle of Man Regions:

East: Onchan, Braddan, Santon, Laxey, Lonan

South: Malew, Castletown, Arbory, Rushen, Port Erin, Port St Mary

North: Ramsey, Bride, Andreas, Ballaugh, Lezayre, Jurby, Maughold

West: Peel, German, Patrick, Michael, Marown

Douglas: treated as a region because of its population density

Further Information
Additional information and analysis can be provided upon request. In order to request any further information please contact Economic Affairs using the contact details provided below:

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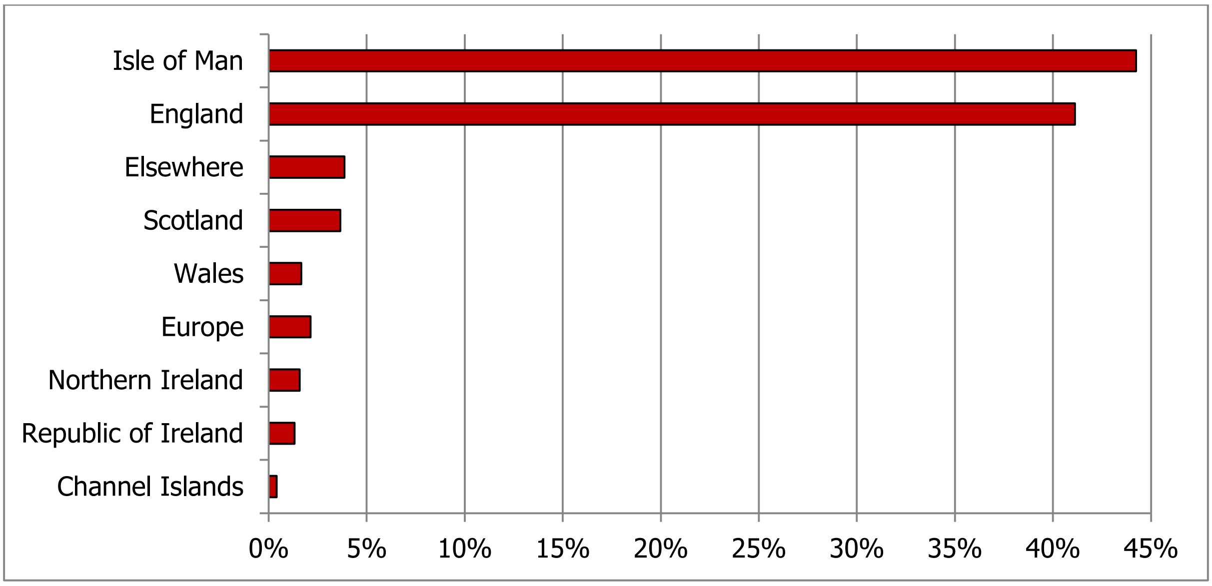
E-mail: economics@gov.im

About you and your household

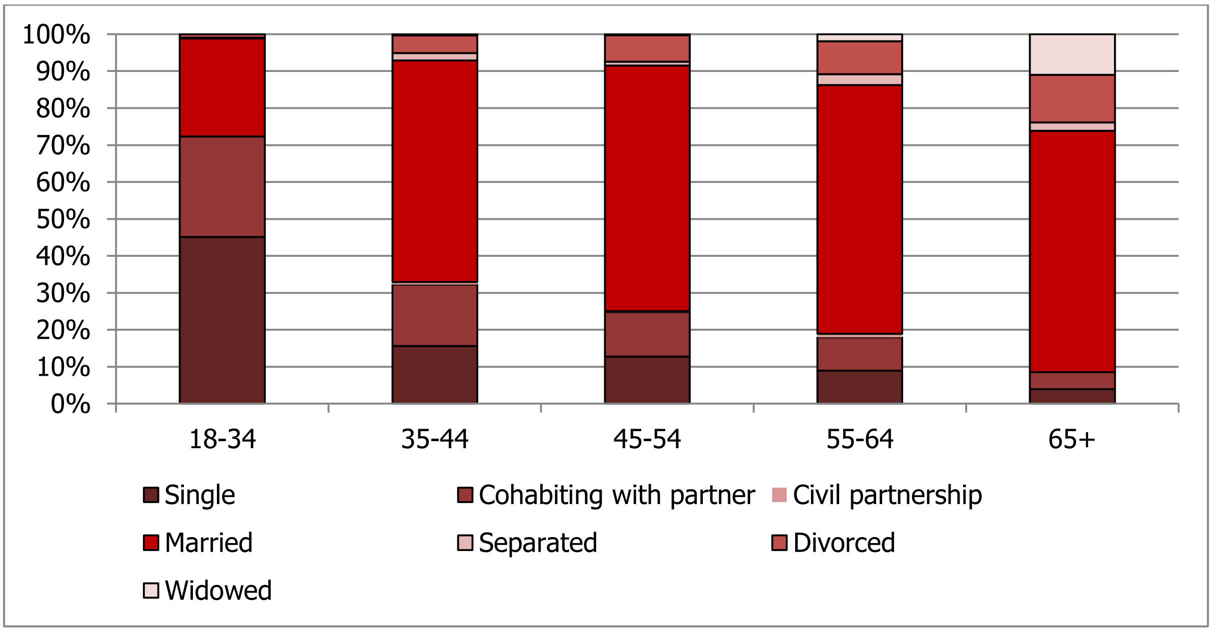
The 2016 Census found that 42% of residents aged 18 and above were born on the Isle of Man. This is similar to the proportion of locally born people responding in the SA17 sample (44%).

Fig. 1: *"Where were you born?"*



Marital status

Fig. 2: *Marital status by age group*



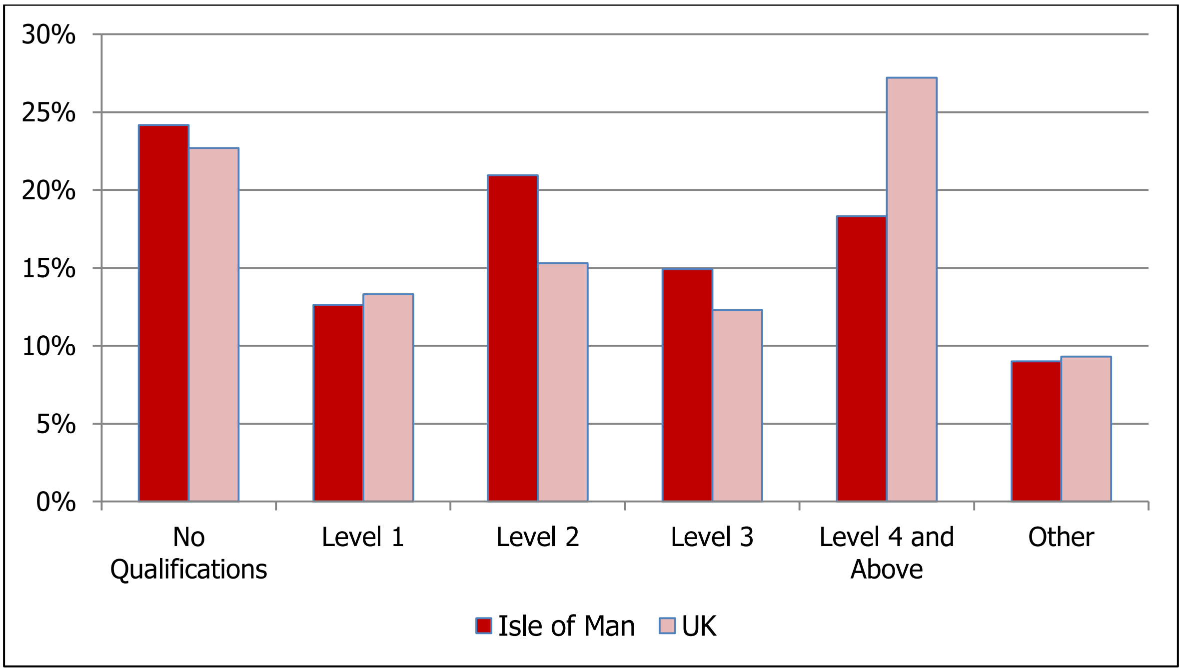
More than half (56%) of SA17 respondents describe themselves as married, while another 14% are cohabiting or in a civil partnership. 12% are either separated, divorced, or widowed, and 18% describe themselves as single. In relation to household data from Census 2016, this breakdown slightly over-represents married couples (46% in census) and proportionately under-represents single heads of household (43% in census), but is generally representative of cohabiting couples and civil partnerships. As may be expected, younger respondents are more likely to be single, 60-65% of other age groups are married, and respondents over the age of 65 are most likely to be widowed.

Education

The SA17 survey asked residents about their highest completed level of education. The sample returned was disproportionately educated in relation to the total population, and any analysis of education should be interpreted with caution.

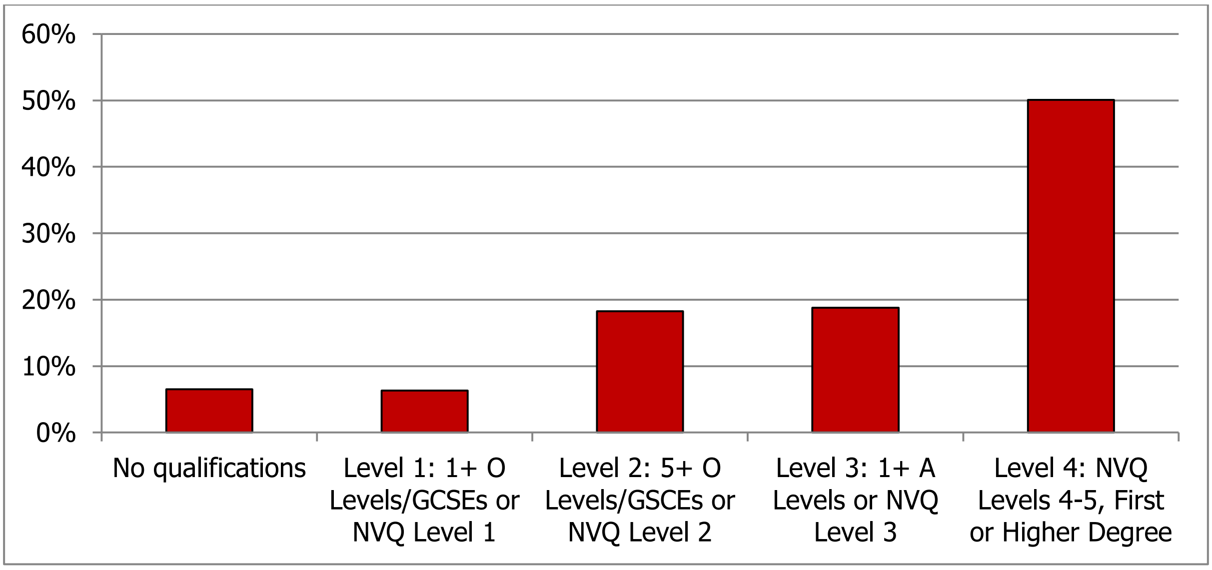
The most recent baseline assessment of the level of education in the Island population was taken in the 2011 Census (educational attainment is a decennial measure, and was not asked in the interim census of 2016). The 2011 Census revealed that the level of education on the island had risen considerably over the previous ten years, but that the island's population as a whole was somewhat less highly educated than the UK.

Fig. 3: *Educational attainment in IOM and UK, 2011*



However, while in 2011 only slightly more than one quarter of residents held a qualification at Level 4 or above, one half (50%) of SA17 respondents described themselves as holding Level 4 qualifications. At the other end of the scale, only 6.5% of SA17 respondents claimed no core qualifications, against the nearly 25% enumerated in the 2011 Census.

Fig. 4: *Highest educational attainment, Social Attitudes 2017*

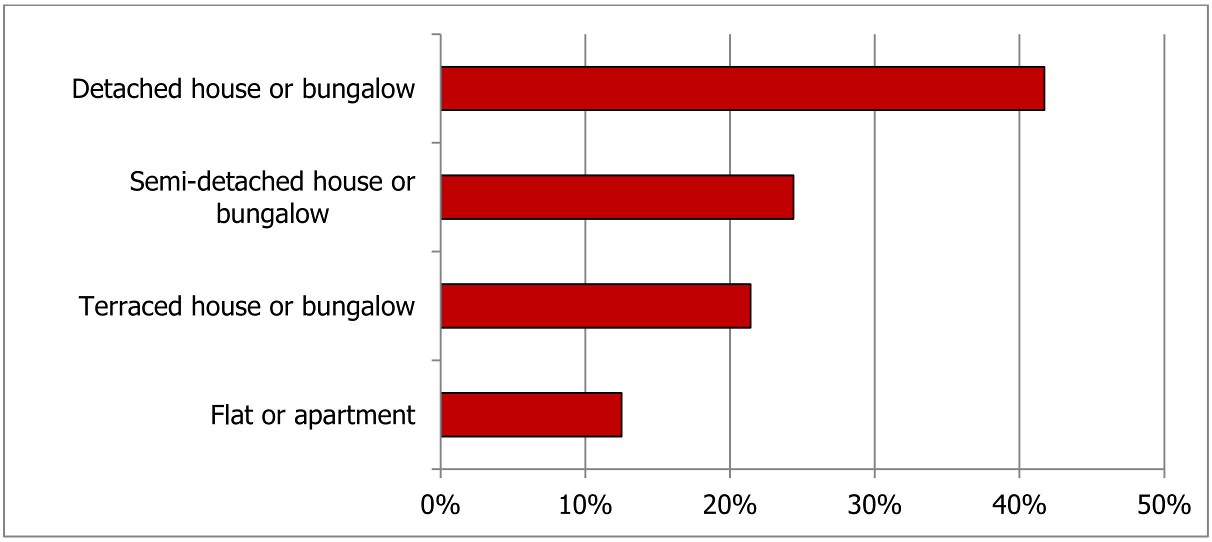


Moreover, 70% of SA17 respondents claim to hold at least one additional qualification, whether professional or otherwise, with 83% of the Level 4 group claiming an additional qualification.

Housing type and tenure

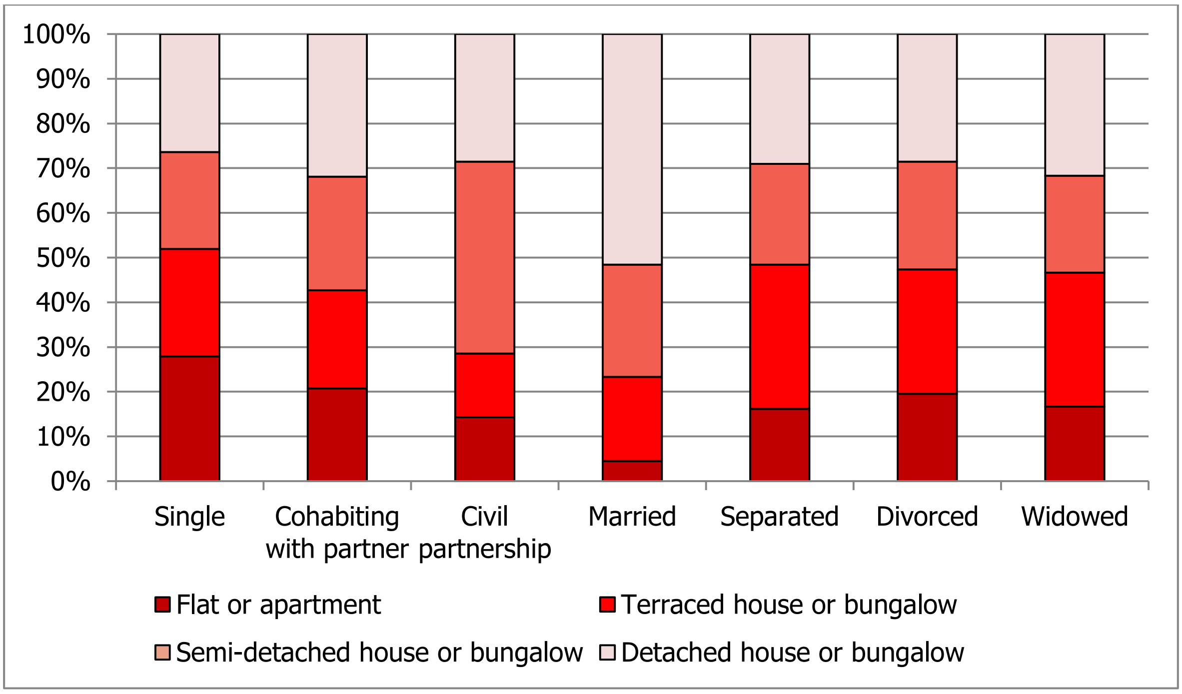
Approximately two in five SA17 respondents live in a detached house, one-quarter in a semi-detached, one-fifth in terraced housing or bungalows, and one in eight in a flat or apartment. This distribution very closely reflects the most recent census information of residential occupancy on the island.

Fig. 5: *Type of housing*



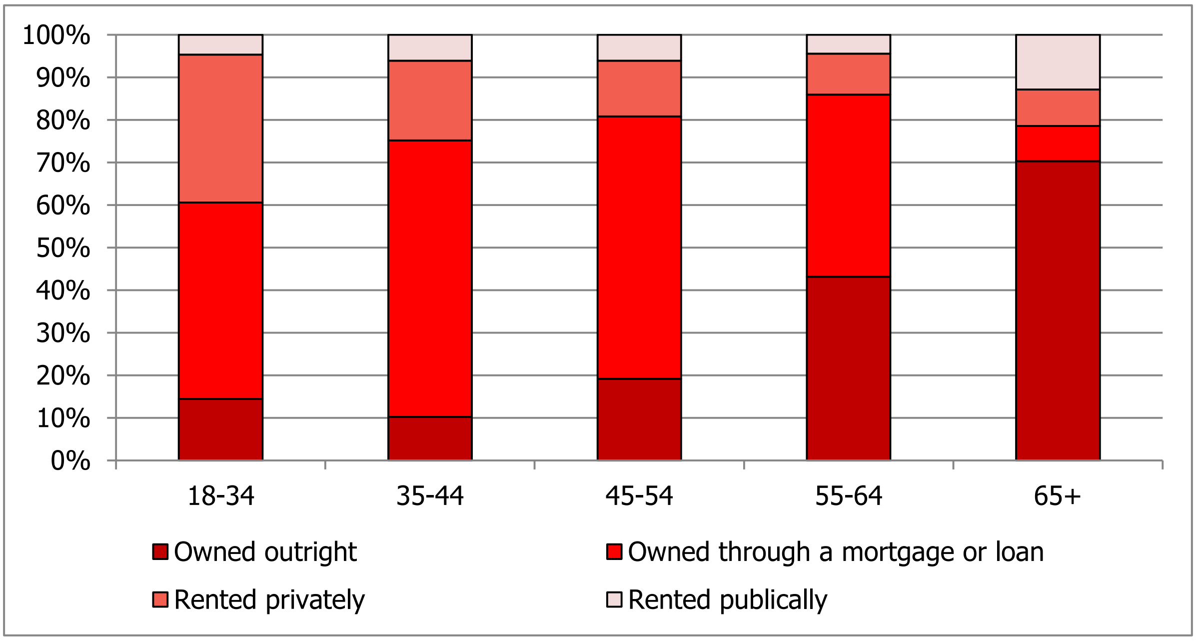
Married couples are most likely to occupy a detached house, while single adults are most likely to occupy a flat or apartment. Semi-detached and terraced housing accounts for nearly one-half of all remaining households.

Fig. 6: *Housing type by marital status*



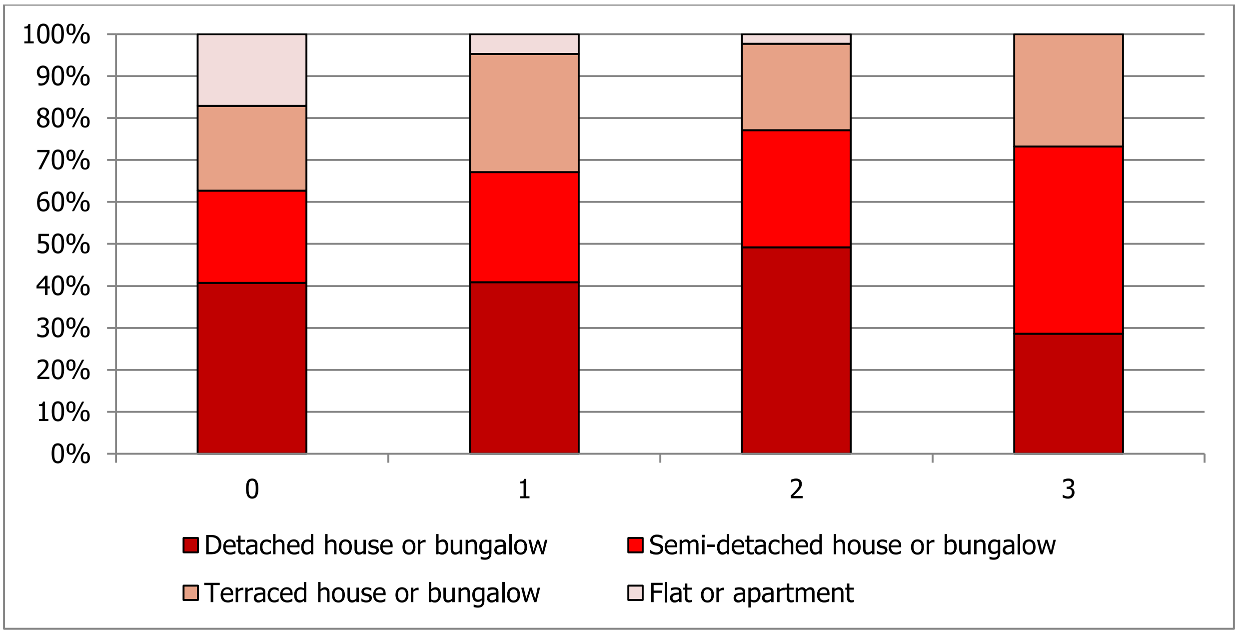
Home owners and mortgagors tend to be older, although the proportionate share of renters increases among respondents who are above the age of retirement. One third of all SA17 respondents own their homes outright, two in five carry a mortgage, 17% are renting privately and 7% are renting publicly from government or local authority.

Fig. 7: *Housing tenure by age group*



Housing type is related to the number of children in a household. Flat or apartment occupancy is most prevalent among child-free households with diminishing frequency up to two children, a finding which is consistent with the generally younger age and single marital status of flat occupants. However, larger young families with three children or more in residence show differences in housing type from smaller families. A family of three or more children is less likely than a child-free household to live in a detached house, and disproportionately likely to live in attached housing (71%).

Fig. 8: *Housing type by number of children in household*



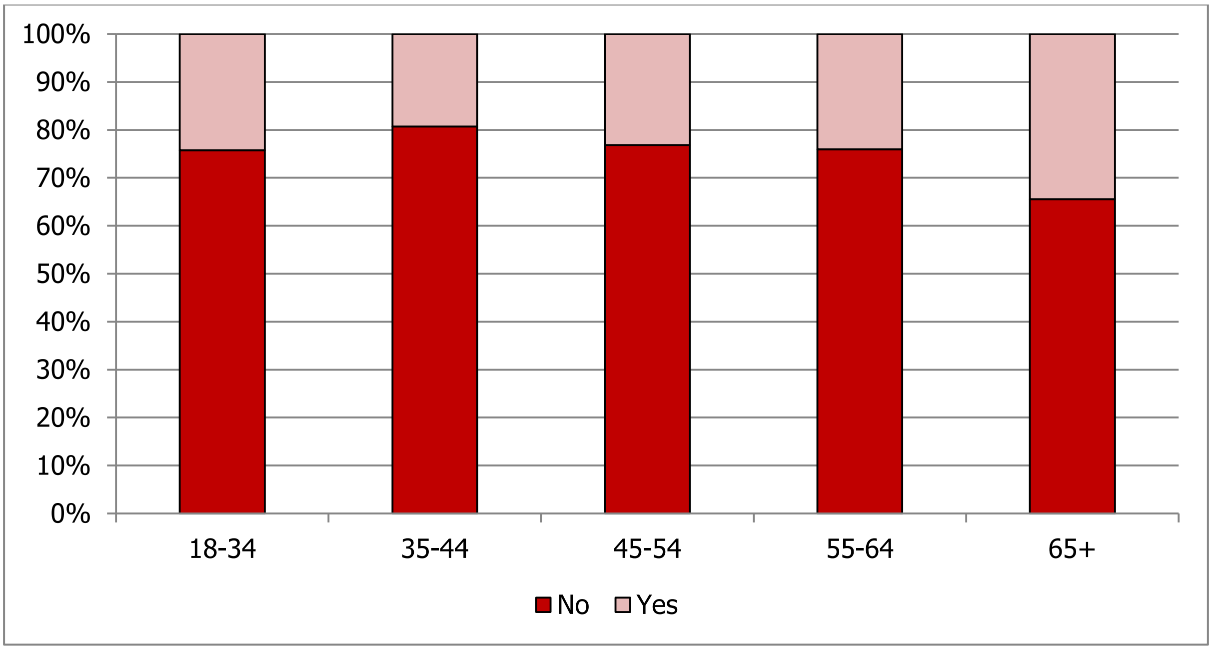
Family composition, care needs, and general health

More than half of SA17 respondents live alone (16%) or in a house with only one other person (42%). Nearly half (46%) of households have at least one empty bedroom.

One in three respondents live in a household with at least one child in residence under the age of 18, and one in five (19%) have one or two children in nursery. The average weekly cost of nursery per household, after preschool credit, is £152.53, for an average of 24.03 hours of nursery care per week, or a per-hour cost of £6.35.

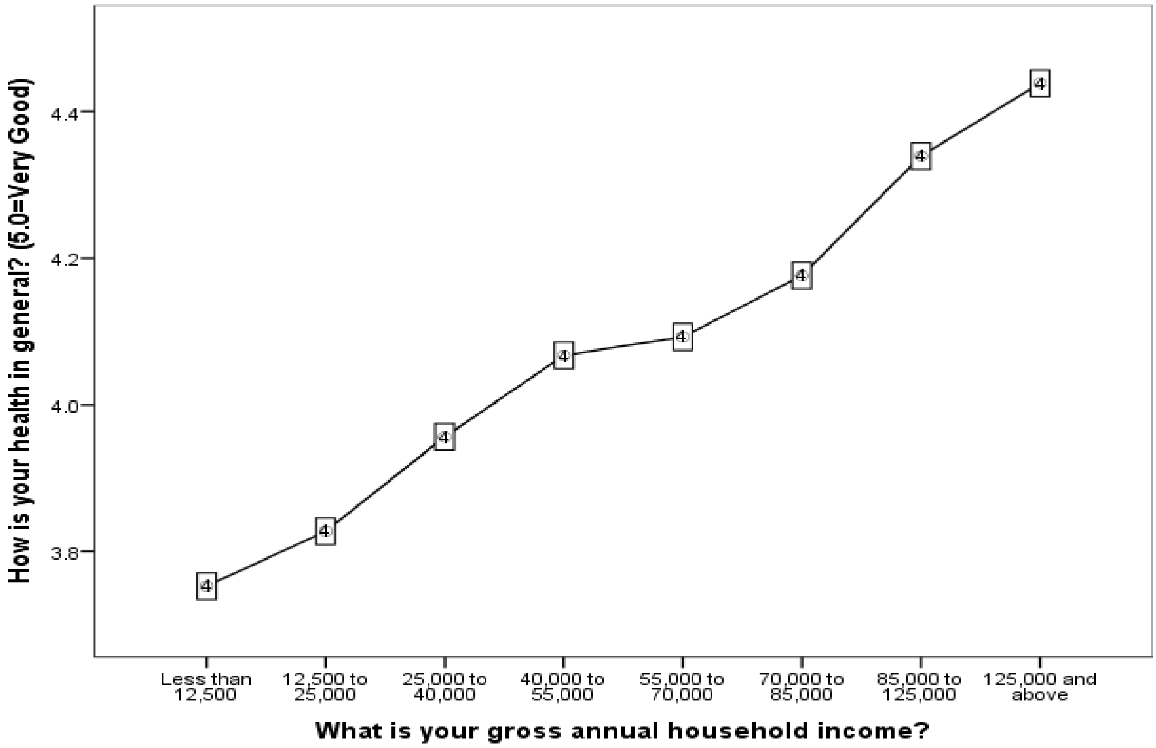
Three-quarters (74%) of respondents indicate that they have no lasting physical or mental health condition or illness, and a similar proportion describe their health as 'good' or 'very good'. These results are virtually identical to the findings of the 2016 Social Attitudes Survey. Incidence of lasting illness and low self-assessed health increases in frequency with age.

Fig. 9: *"Do you have a physical or mental health condition or illness lasting or expected to last 12 months or more?" by age group*



Health also correlates significantly to gross household income. While the majority of respondents, even above the age of 65, reported their health as 'good/very good', average self-reported health status rises steadily and significantly as household income increases.

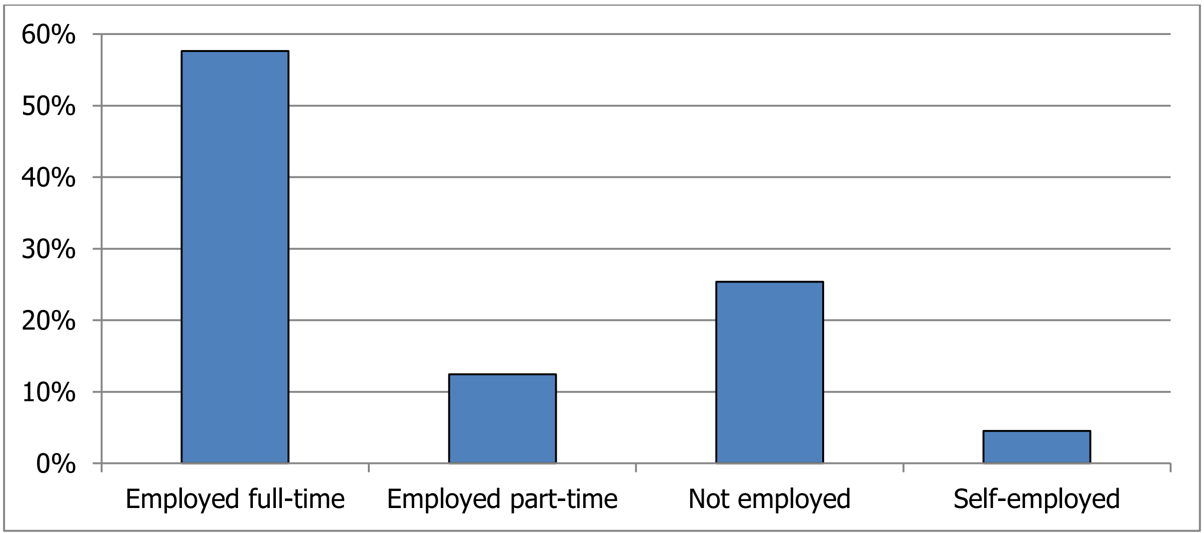
Fig. 10: *General self-reported health by gross annual income*



Employment and Income

75% of respondents stated that they were currently in employment at the time of the SA17 survey - a higher proportion than was recorded in the 2016 Census, at which time 63% of residents aged 18+ were employed. Among SA17 respondents, 58% were employed full-time, 12% were employed part-time, 5% were self-employed, and the remaining 25% were not employed.

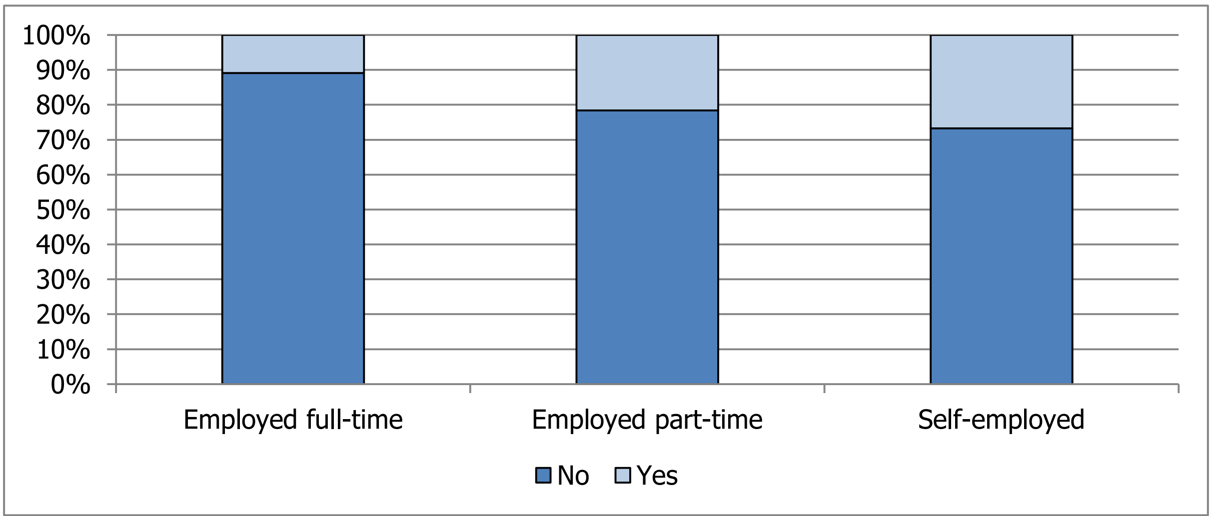
Fig. 11: *Employment status*



Among respondents not currently in work, 80% are retired, 2.5% are in education, 2.5% are actively seeking work, 5% are looking after home and family, and 6% are unable to work.

Self-employment is related to underemployment. Respondents who describe themselves as self-employed are almost three times more likely to indicate that they would be willing to work more hours per week at their current rate of earnings.

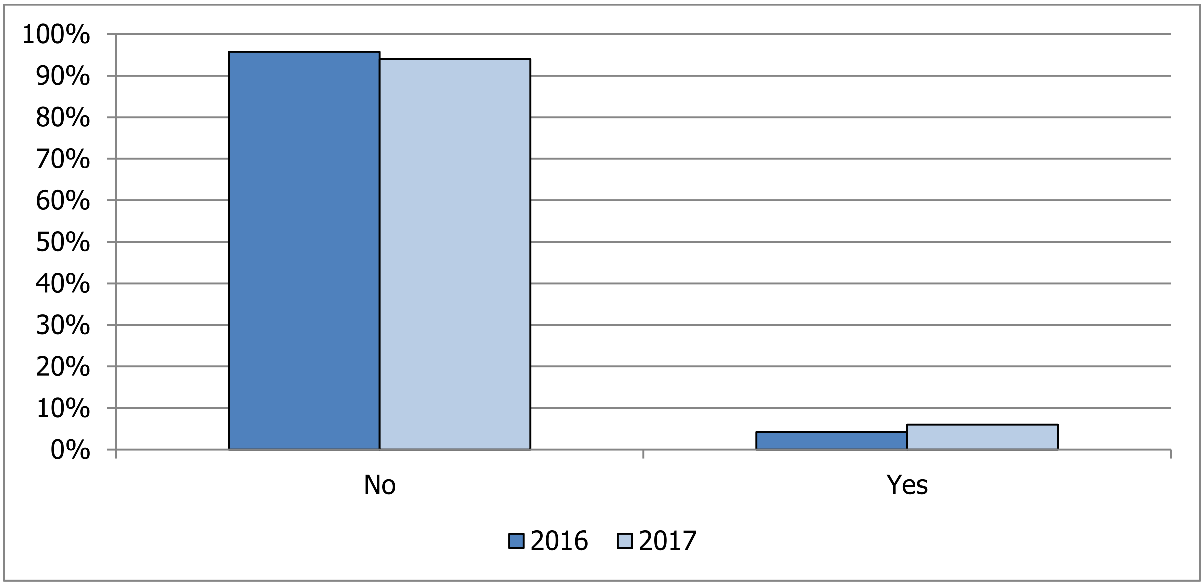
Fig. 12: *Employment status, by preference for more hours of work*



Precarious employment, underemployment and job security

The 2017 survey included a slightly higher proportion of respondents on zero-hours contracts than the previous year (6.02% in 2017, vs. 4.23% in 2016). This slight increase is too small to be statistically significant, but it may indicate a trend in the long term.

Fig. 13: *Proportion of labour force on zero-hours contract, 2016/17*



Zero hours contracts tend to fall disproportionately upon the youngest and oldest workers. Between two and four percent of workers aged 35 to 64 are on zero hours, but nearly one in ten (9%) of 18-34 years workers and nearly one in five (19%) of retirement-age workers are on zero hours contracts.

Respondents were asked if, given the opportunity, they would choose to work more hours at their current rate of pay. One in ten (11%) of full-time workers would increase their hours, against 22% of part-time workers and 27% of self-employed workers. The 2016 Social Attitudes survey showed comparable results for full-time workers, but whereas part-time workers are now less underemployed than one year ago (28% in 2016), conversely, self-employed workers are now twice as likely to describe themselves as underemployed than they did one year ago (14% in 2016).

Fig. 14: *Proportions of respondents seeking more hours of work, by employment status, 2016/17*

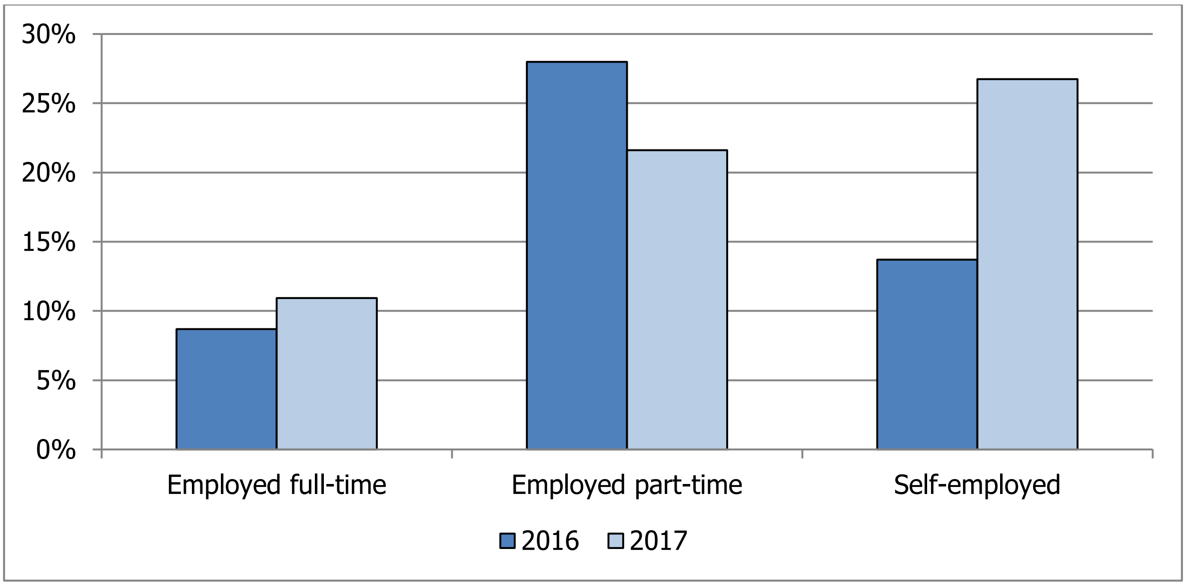
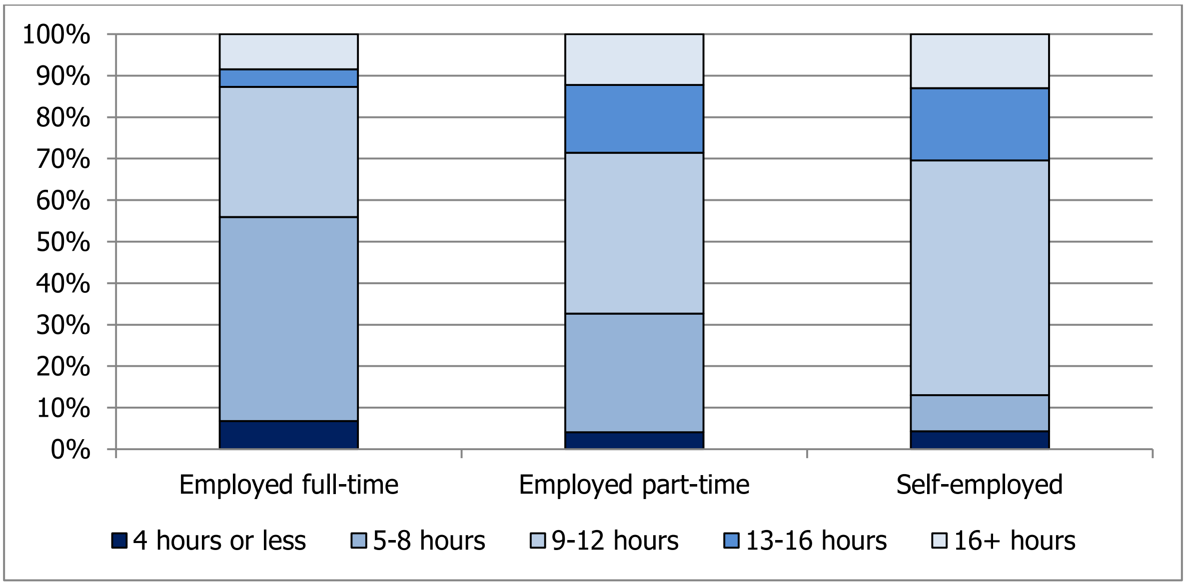
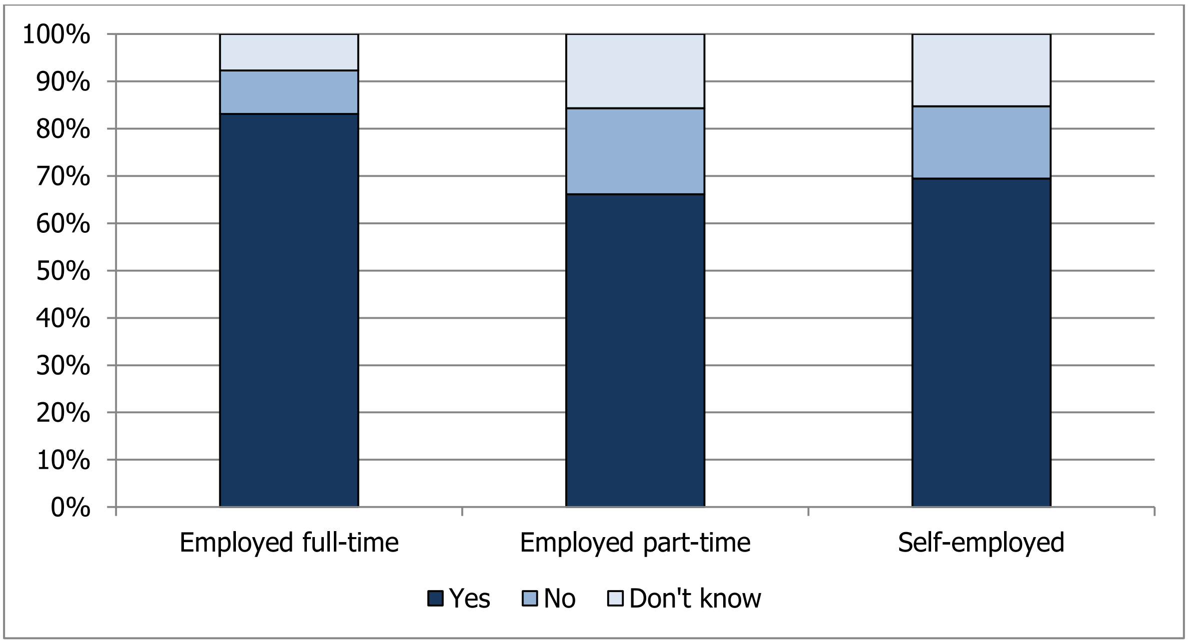


Fig. 15: *Additional hours of work wanted, by employment status*



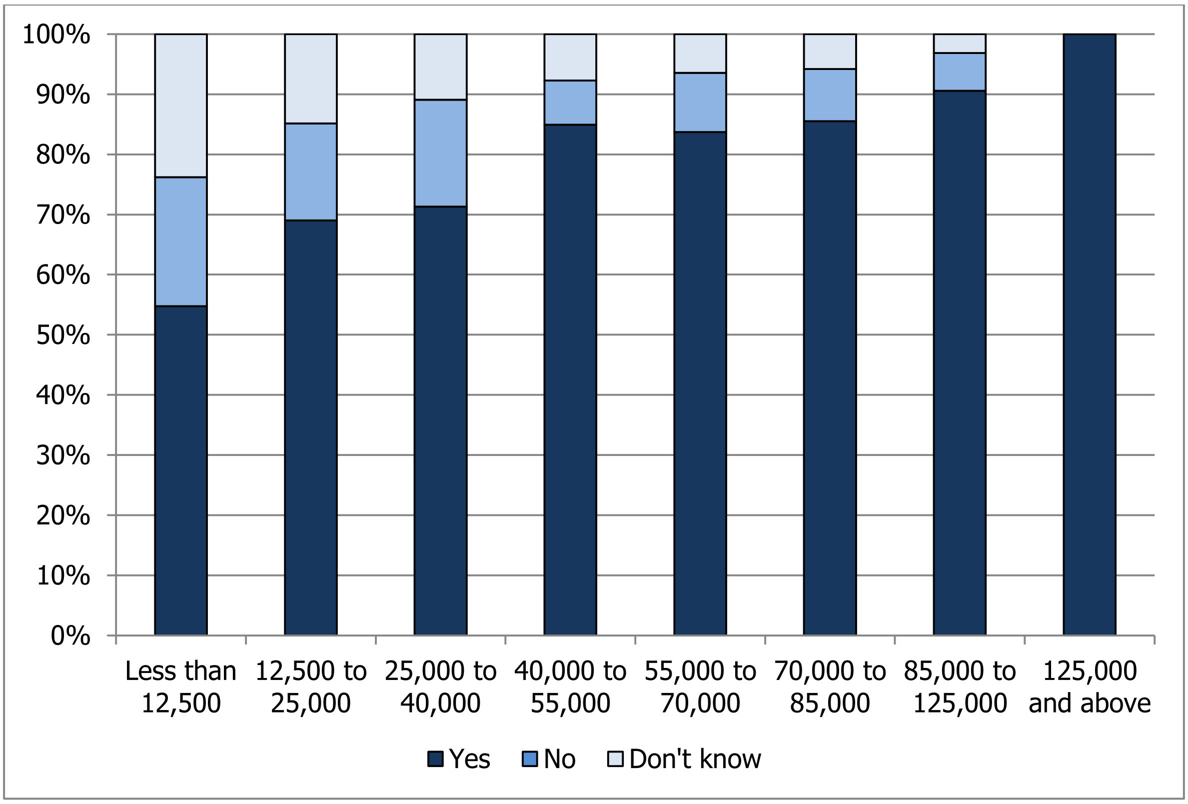
While 79% of employed respondents feel that their jobs are secure for the next twelve months, 11% feel their jobs are not secure, and nearly the same proportion (9.5%) are uncertain. Part-time workers report the highest degree of precarity and uncertainty (34%), followed closely by self-employed workers (31%).

Fig. 16: *Perceived job security, by employment status*



Moreover, greater perceived job insecurity is correlated with low annual household income. Households at the bottom of the income scale, with an annual household income of less than 12,500, are 45% more likely to experience job insecurity than those at the top of the income scale, and 30% more likely than households at the median income level as indicated in the SA17 survey.

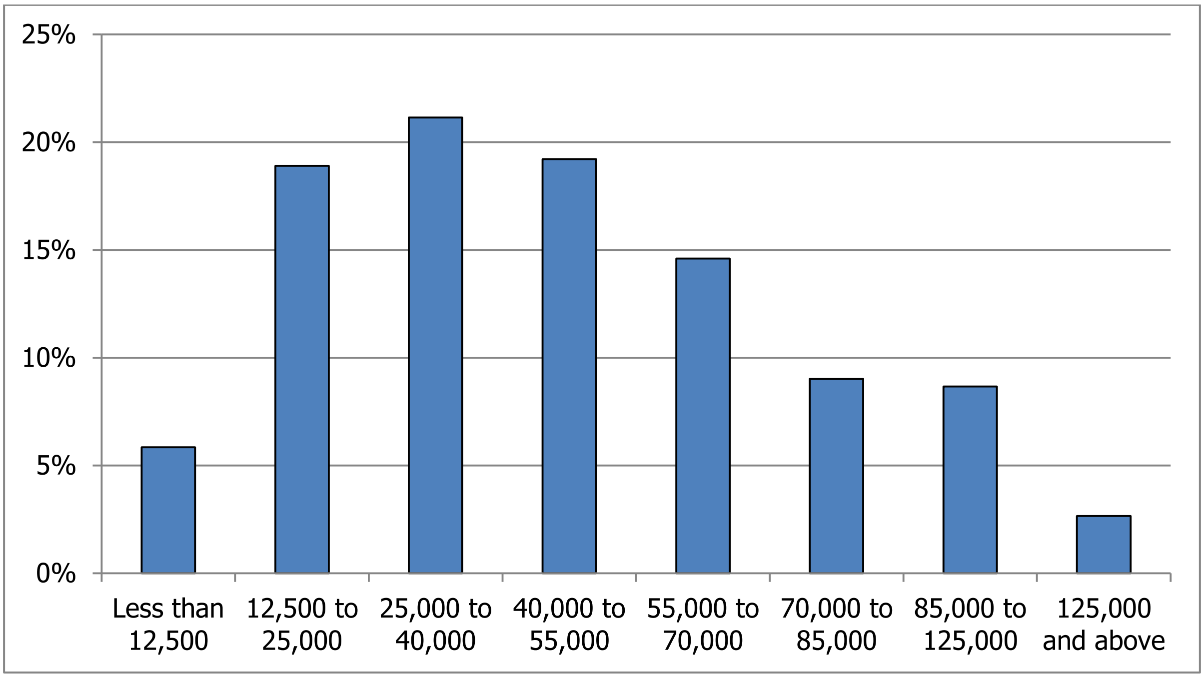
Fig. 17: *Perceived job security, by gross annual household income*



Income and retirement intentions

Median gross annual household income of respondents falls in the £40,000 - £55,000 category. Nearly one in ten (9%) of respondents did not indicate their annual household income.

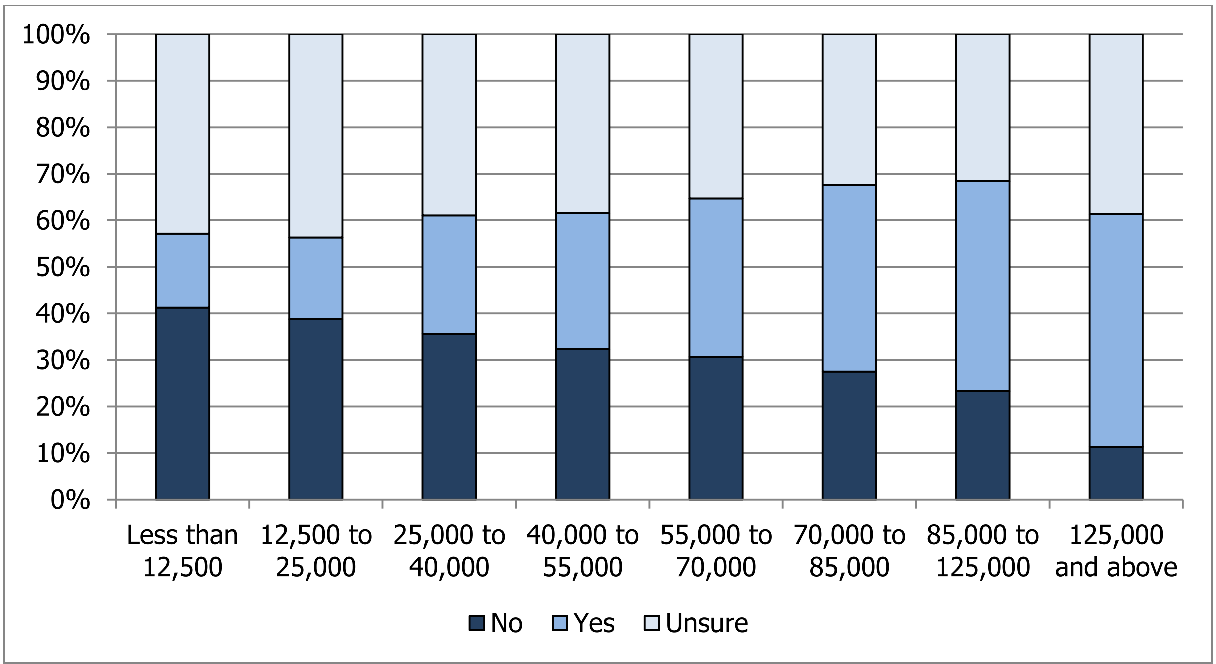
Fig. 18: *Gross annual household income*



Respondents under age 65 who are not already retired were asked if they had any intention to retire before reaching the state pension age. 32% of respondents indicated the intention to retire early, while a similar proportion (29%) stated that they would not.

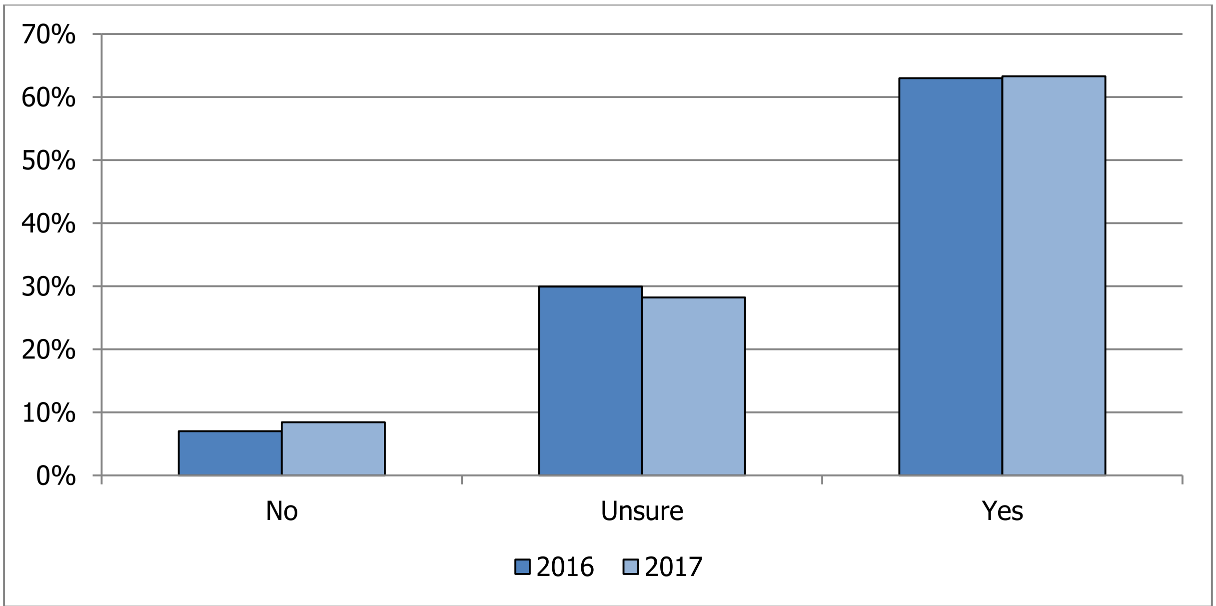
As may be expected, early retirement intentions are closely related to household income level. Respondents at the highest level of income are more than three times more likely to indicate the intention of early retirement than those at the lowest income level, and twice as likely as those who fall in the median income category.

Fig. 19: *Intention to retire before state retirement age, by gross annual household income*



63% of respondents not yet retired indicate the intention to remain on the Isle of Man upon reaching retirement age, while 8% indicate the intention to leave before that time. These proportions are not significantly different from the 2016 results of the same question.

Fig. 20: *Intention to remain on Island after retirement, 2016/17*

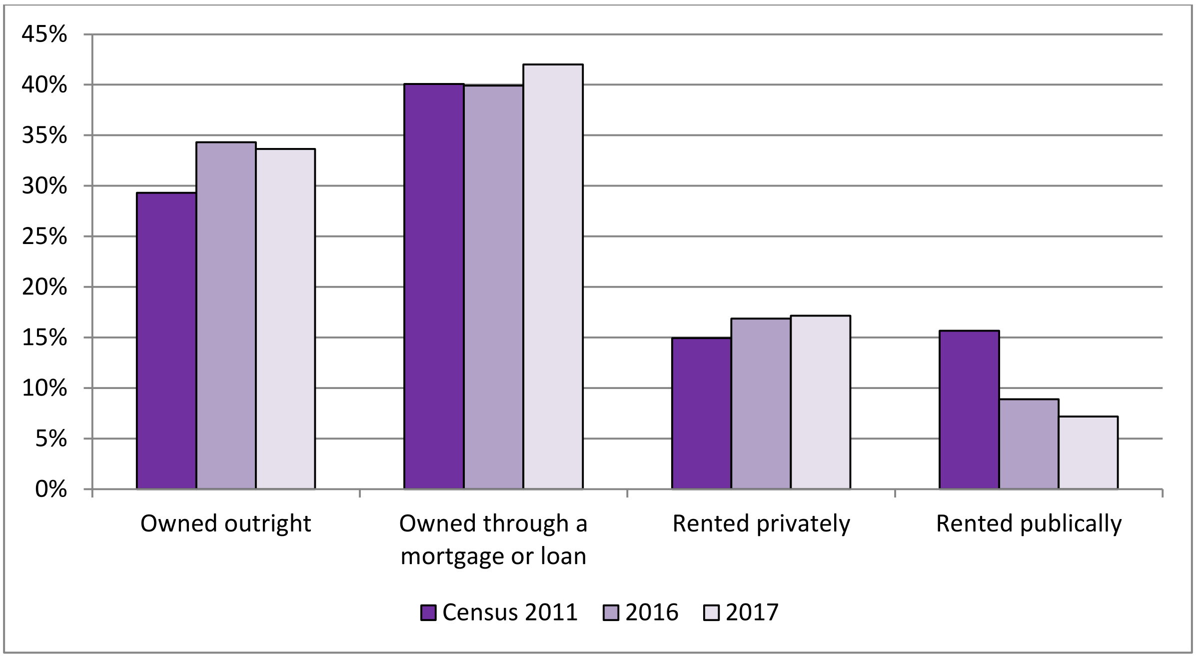


Housing

76% of SA17 respondents indicate home ownership, whether owned outright (34%) or through a mortgage or home loan (42%). 17% are renting on the private market and 7% are renting from government or local authority. These sample proportions are closely similar to housing tenure proportions found in the Social Attitudes survey in 2016.

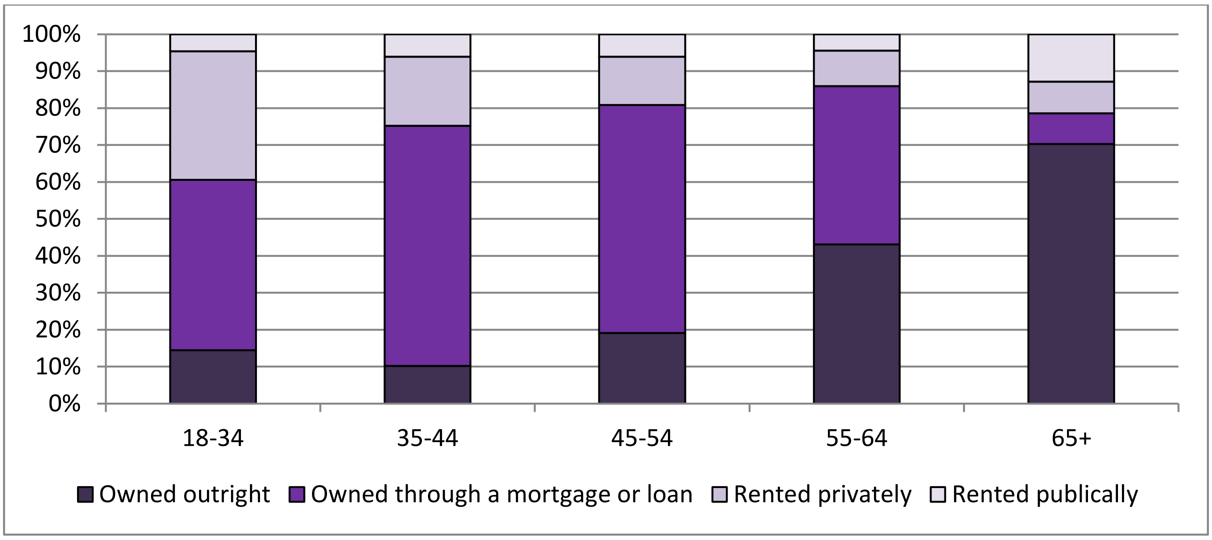
However, in comparison to housing tenure proportions found in the 2011 Census, the Social Attitudes survey over-samples home owners by approximately 8%, and systematically under-samples those residents who are renting publically by almost the same margin (8.5%). Census data on housing tenure will be updated in 2021 and these sample biases may be found to differ at that time.

Fig. 21: *Housing tenure, Census 2011 and Social Attitudes 2016/17*



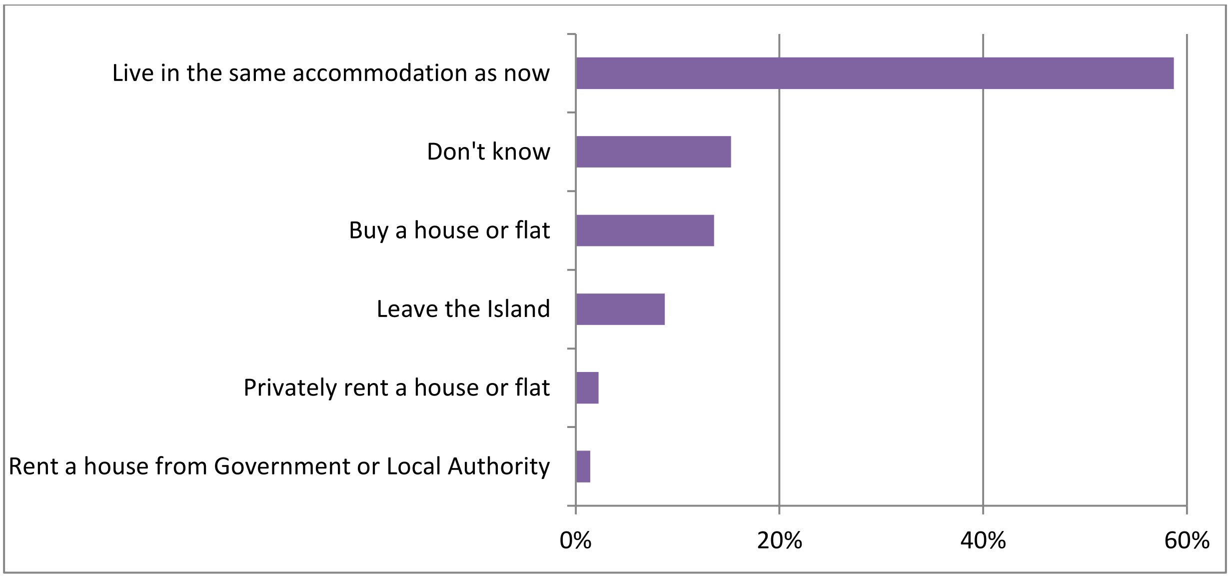
Home ownership vs home rental is correlated with age: older respondents are more likely to own their home or carry a mortgage. This trend reverses somewhat past the age of retirement, as the largest share of people renting publicly from government or local authority are those aged 65 and above (13% of this age group, against 7% of the sample as a whole).

Fig. 22: *Housing tenure, by age group*



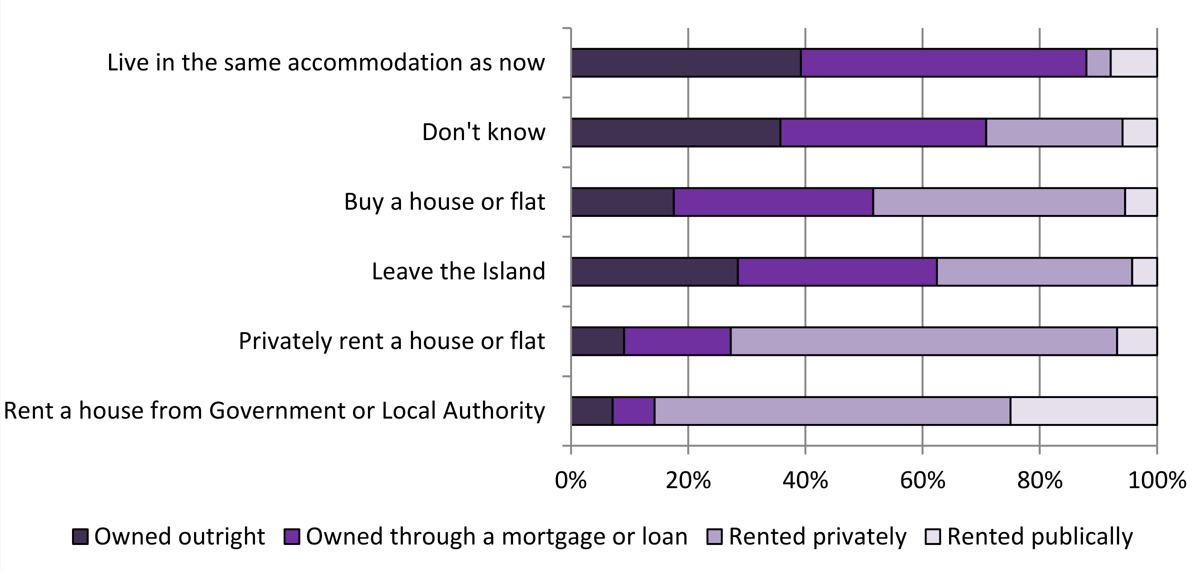
The majority of respondents (59%), regardless of housing type or tenure, expect that in five years' time they will live in the same accommodation as at present. 14% expect to buy a house or flat, although slightly more than half (52%) of this group already owns a home outright or carries a mortgage. 15% do not know, and nearly one in ten (9%) expect to leave the island.

Fig. 23: *Future housing expectations (+5 years)*



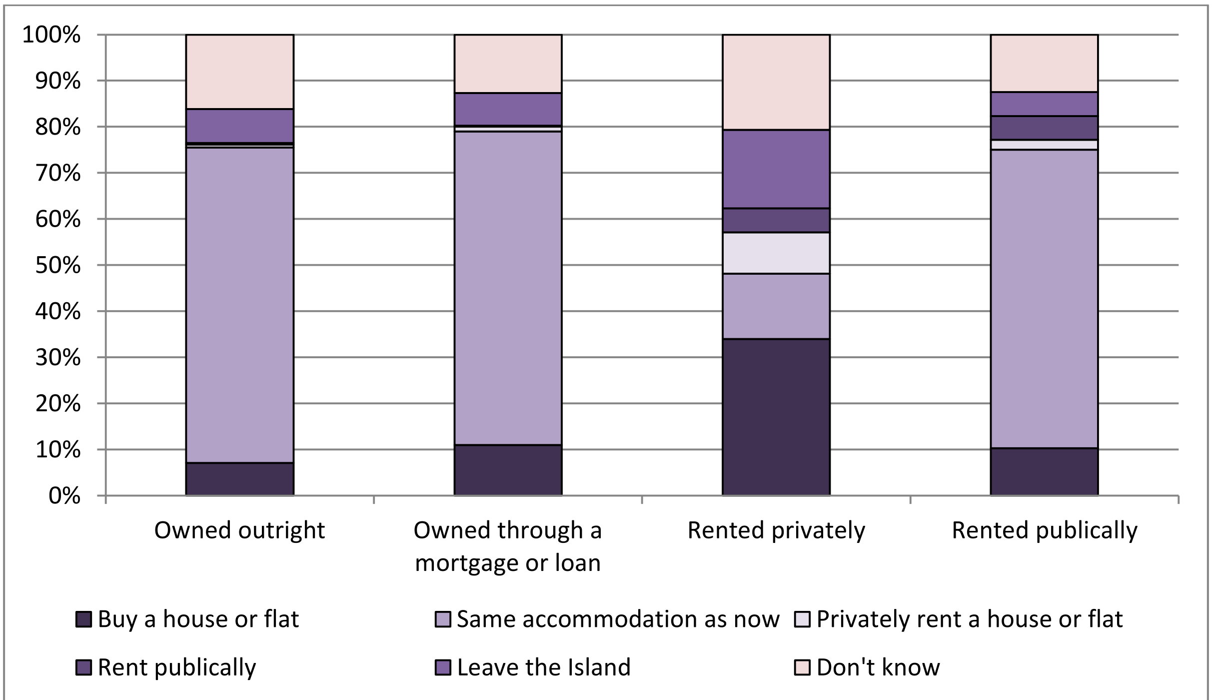
As may be anticipated, expectations of stability (living in the same accommodation as now) pertain primarily to home owners, who account for 76% of the sample but 87% of those who expect to remain in their present accommodation. Approximately two-thirds of people who expect to rent privately are already renting privately, suggesting a tendency to exchange or upgrade rental accommodations among this group. Of the 9% who intend to leave the island within five years, more than half own or mortgage their accommodation.

Fig. 24: *Future housing expectations, by current housing tenure*



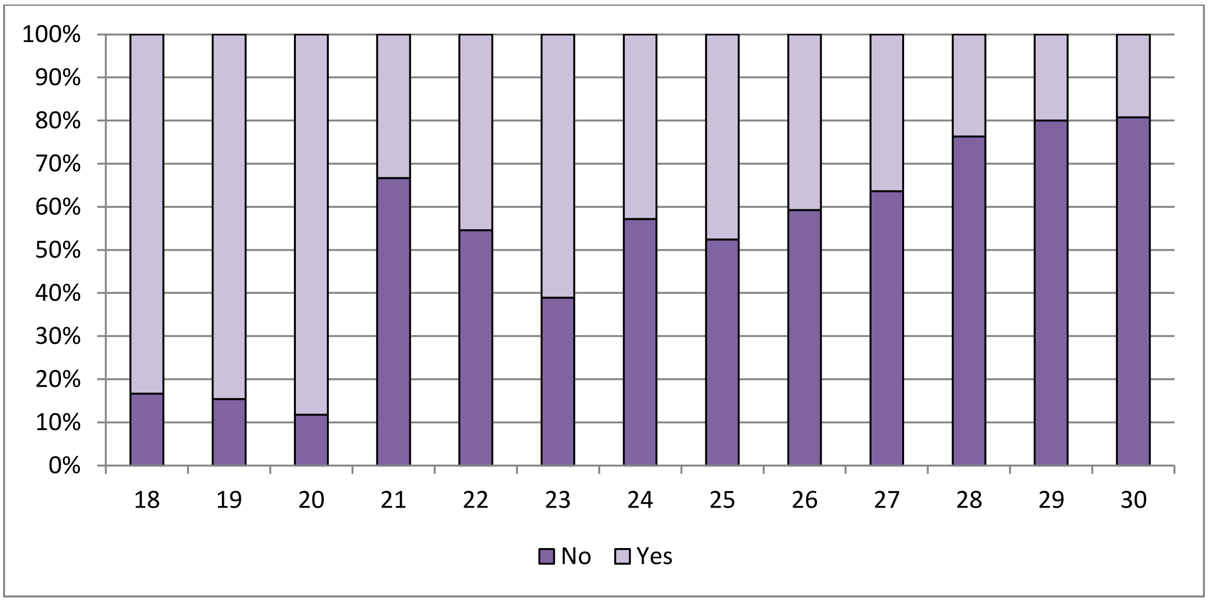
Respondents who are currently in the private rental market demonstrate the greatest residential mobility in the medium term. One-third of private renters optimistically plan to purchase a property within the next five years, but these respondents are also disproportionately likely to plan to leave the island (17%, against a sample proportion of 9%).

Fig. 25: *Current housing tenure, by future housing expectations*



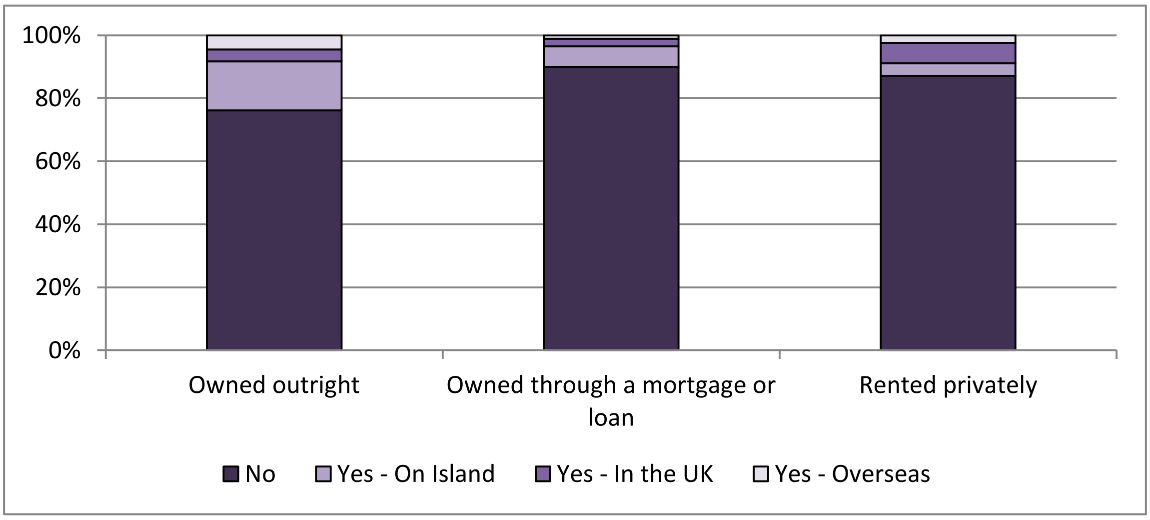
One in eleven respondents (9%) resides in the home of their parents or the parents of their partner, and as may be expected nearly three-quarters of these (71%) are under the age of 35. Respondents in their twenties show an increasing tendency towards independent living as they age, with the proviso that single-year age groups are based on very small sample sizes.

Fig. 26: *"Do you currently live with your parents or the parents of your spouse or partner?", by age (18 to 30)*



14% of respondents have a second residential property - 9% have a second property on the island, and 5% indicate a second property either in the UK or elsewhere overseas. No respondents currently in the public rental market indicate other property ownership. Respondents who are currently privately renting on the island are the tenure group most likely to own property in the UK (6%).

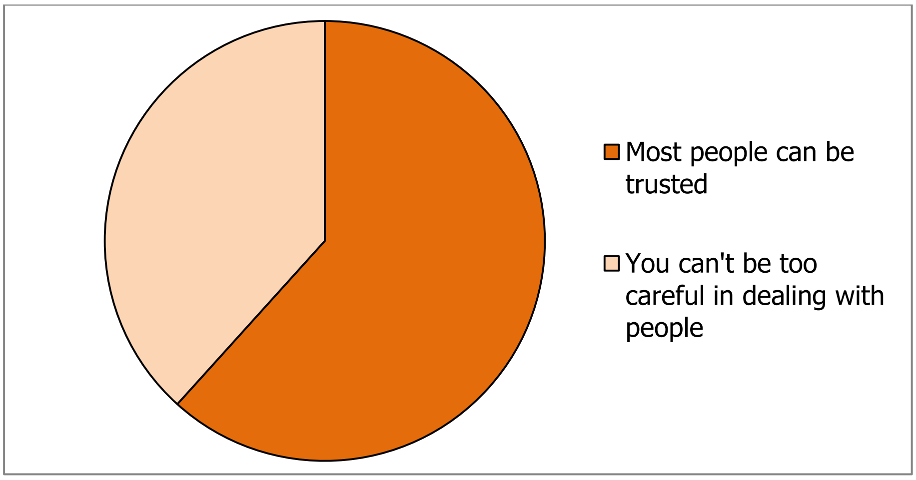
Fig. 27: *Ownership of additional residential property, by housing tenure*



Social Trust and Cohesion

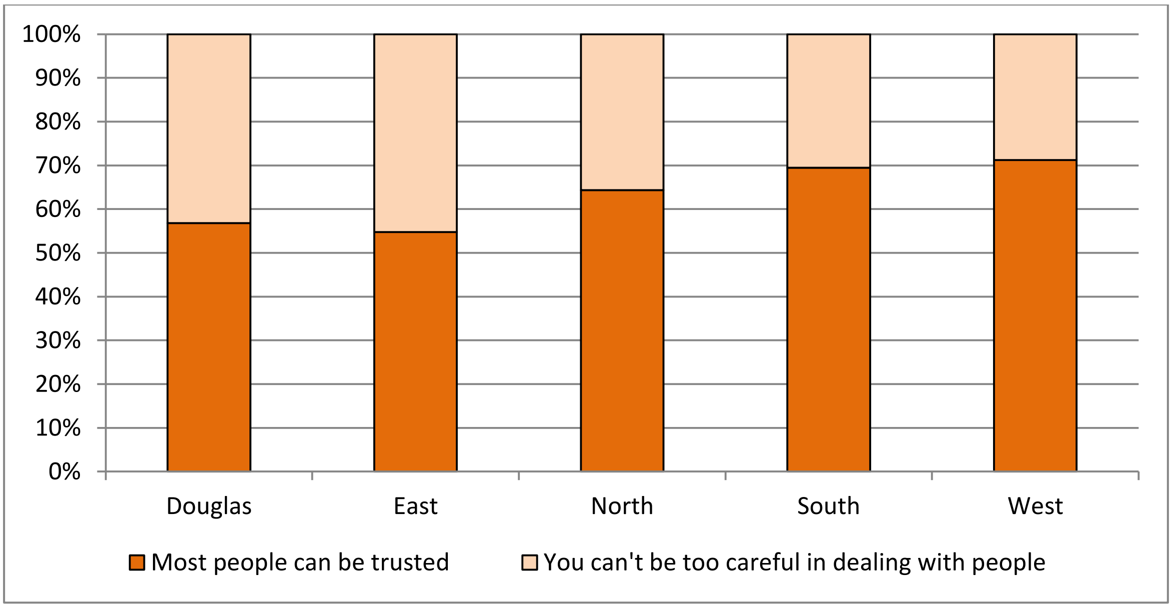
Social trust is a dimension of social capital that correlates to lower crime, better civic engagement, more successful social support networks, and higher levels of perceived personal security and well-being. 62% of SA17 respondents indicate the opinion that 'Most people can be trusted'. This proportion is identical to the responses given one year ago in the Social Attitudes Survey, and almost twice as high as the same indicator for the UK as of 2015 (35%).

Fig. 28: *General social trust*



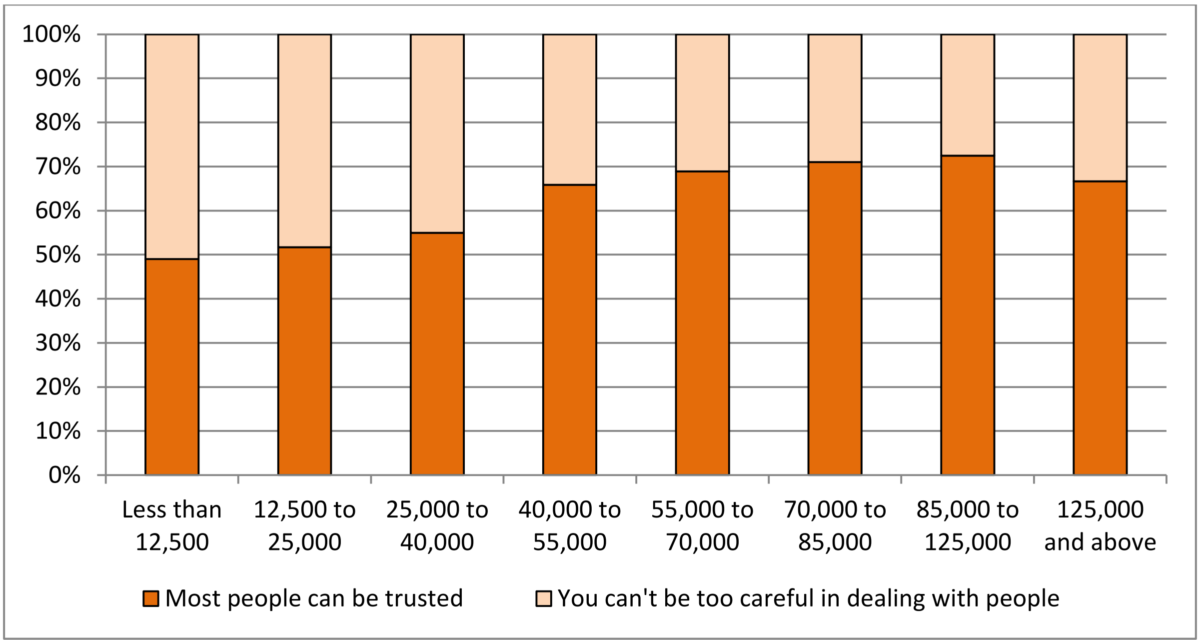
The level of general social trust differs across the Island. The lowest level of social trust is indicated by respondents from Douglas (57%), and the highest level of social trust is found in the West (70%).

Fig. 29: *General social trust, by area*



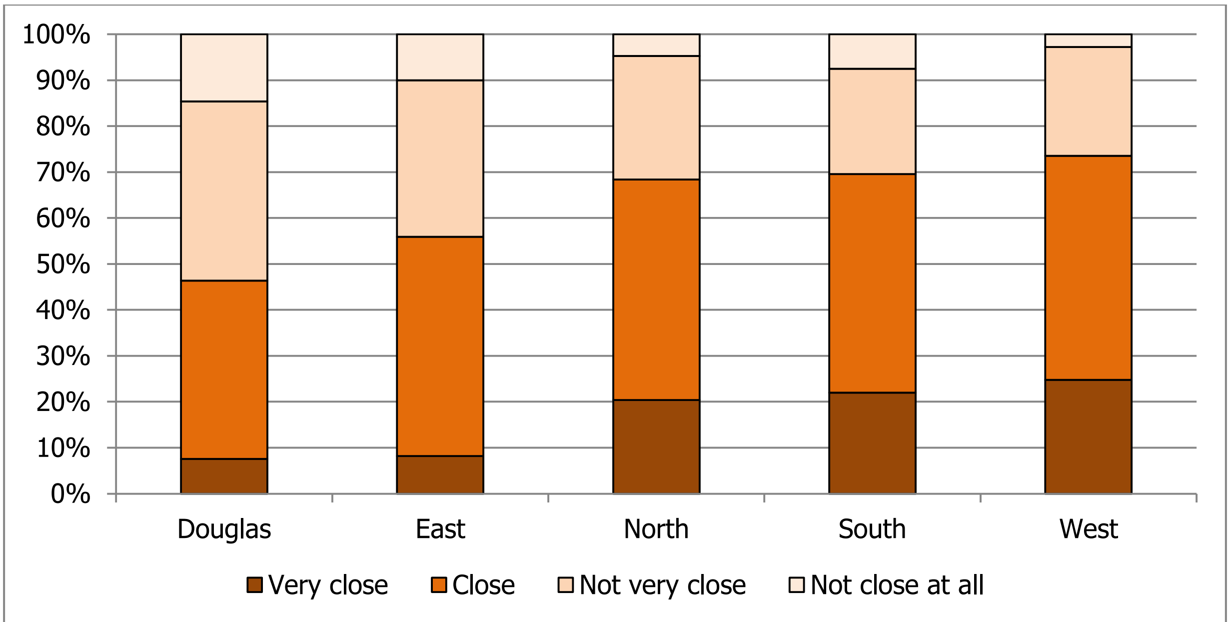
Social trust is also significantly related to annual household income. In general, higher levels of income correlate to higher levels of social trust.

Fig. 30: *General social trust, by gross annual household income*



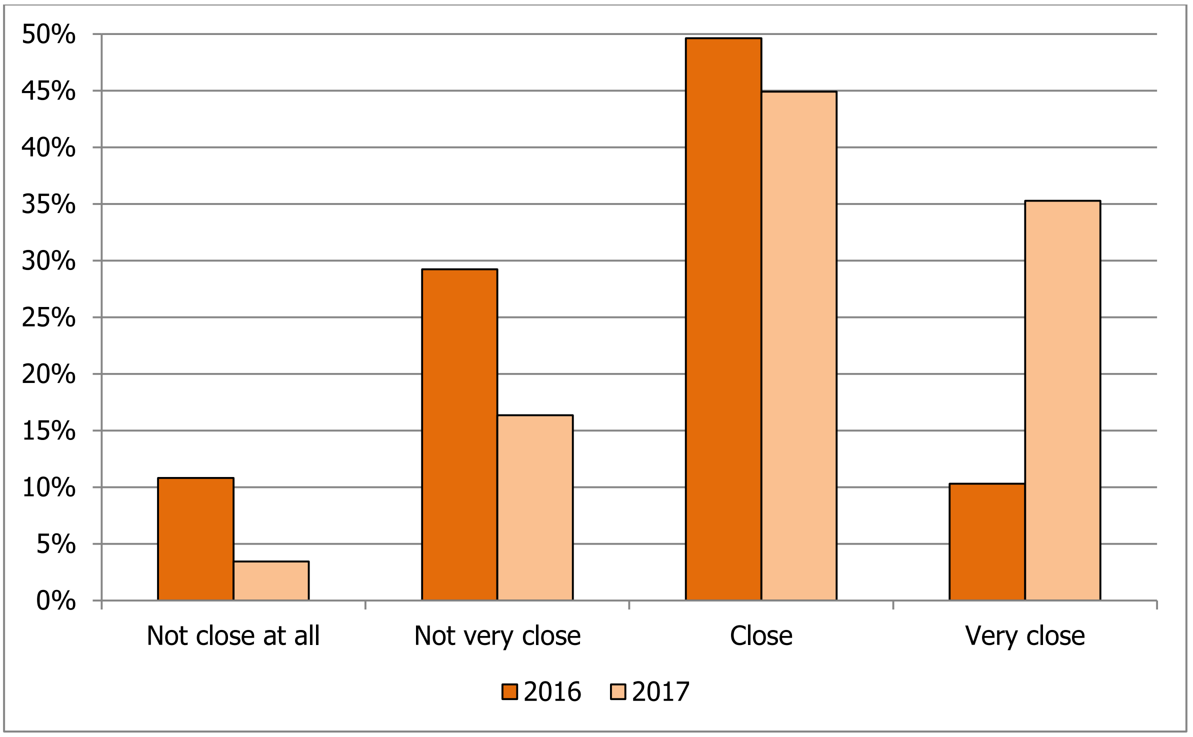
Public feelings of closeness to one's town, as well as to the island, show considerably higher levels in comparison to one year ago. SA17 Respondents are 10% more likely to indicate feeling 'close' or 'very close' to their town or village. As was the case in 2016, the lowest level of close feeling pertains to residents of Douglas, and the highest level is indicated by the West of the Island.

Fig. 31: *Feelings of 'closeness' to one's town or village, by area*



Generalized feelings of closeness to the Island increased more dramatically in the past year. SA17 respondents were 30% more likely than one year ago to indicate that they feel 'close' or 'very close' to the Island, and 25% more likely to indicate that they feel 'very close'.

Fig. 32: *Feelings of 'closeness' to the Island, 2016/17*

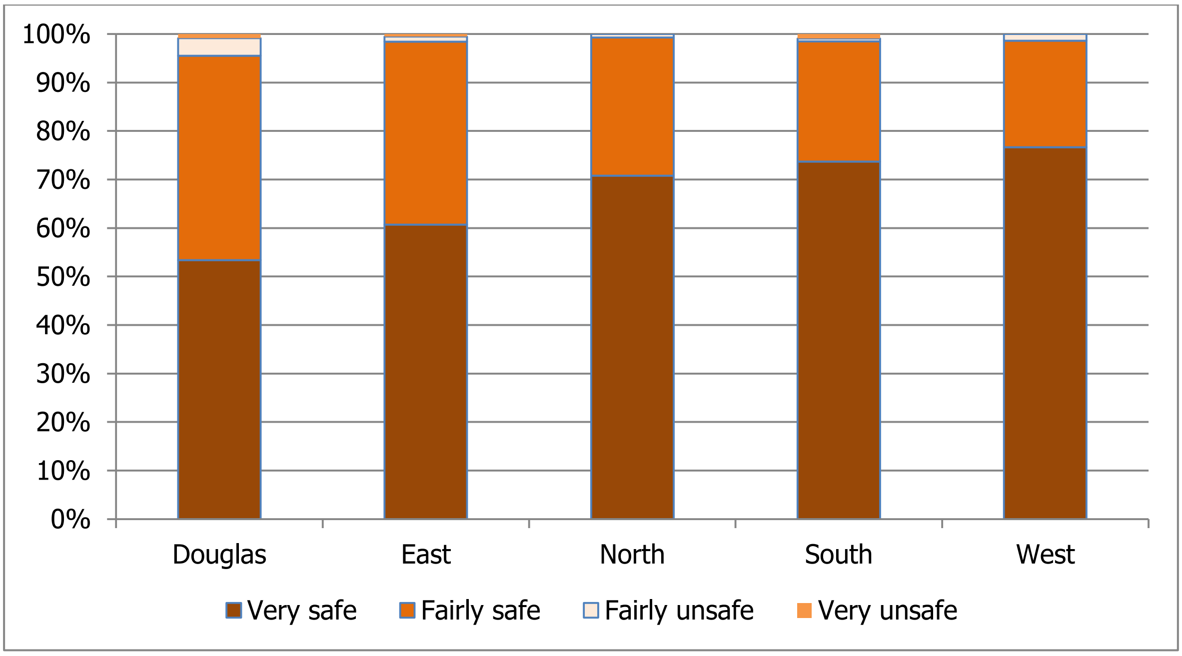


Personal Safety and Perceived Crime

Respondents were asked about their feelings of personal safety in their homes and in their neighbourhoods, and further asked about perceptions of neighbourhood crime over the past two years. 98% of respondents feel 'fairly safe' or 'very safe' in their homes, a proportion identical to the findings from one year ago.

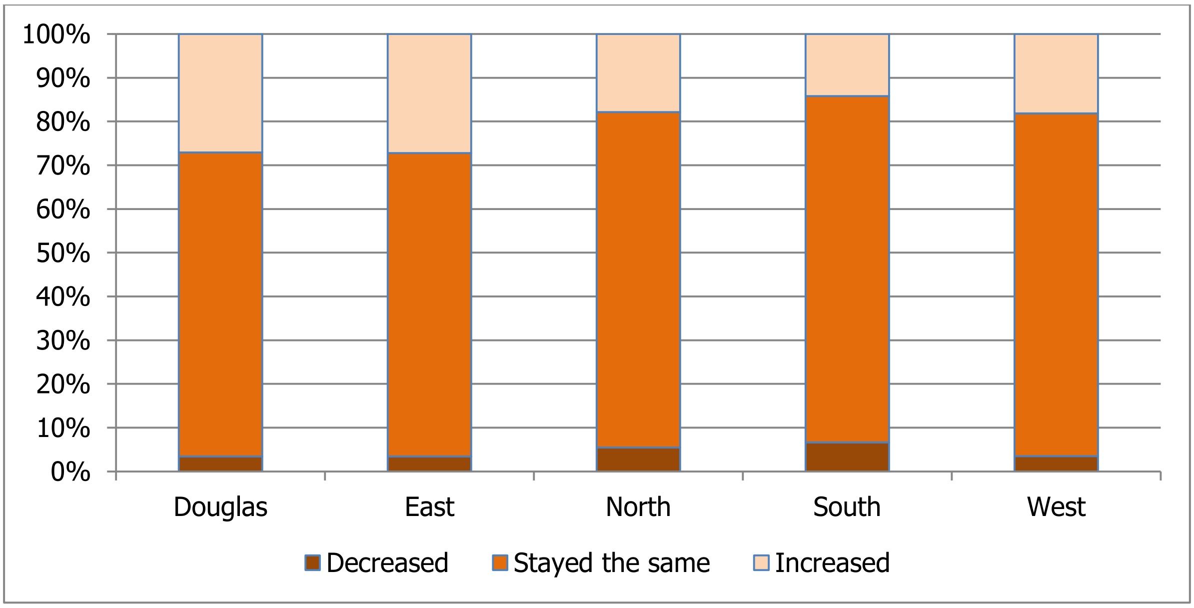
SA17 respondents feel safer in their neighbourhoods this year than they reported feeling last year; overall perceptions of neighbourhood safety remain at 97%, but SA17 respondents were 10% more likely to describe their neighbourhoods as 'very safe', rather than 'fairly safe'. All areas of the Island show an increase in perceptions of neighbourhood safety; the greatest regional increase in perceived neighbourhood safety from one year ago is in the West of the Island, as these residents are now 15% more likely than last year to describe their neighbourhoods as 'very safe'.

Fig. 33: *Perception of personal safety in one's neighbourhood, by area*



Perceptions of neighbourhood crime remain stable over the past year. 73% of all respondents feel that the level of crime in their neighbourhoods has stayed the same, while 22% perceive an increase in neighbourhood crime. As was found in last year's survey, the area of the Island with the lowest perceived crime level is the South, while the highest perceptions of increased crime are in Douglas and the East.

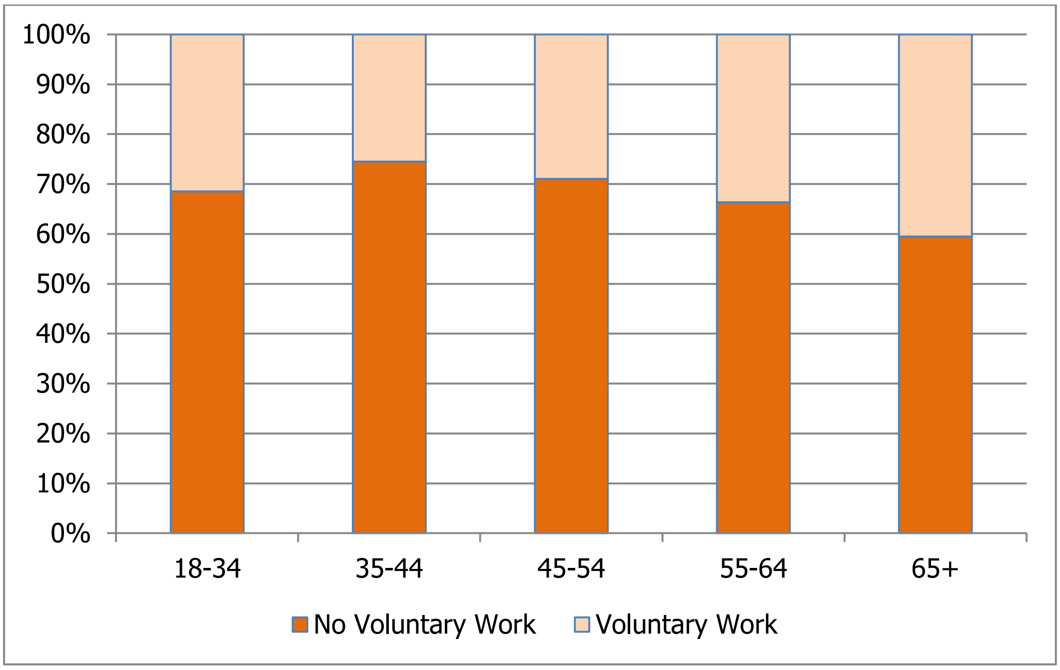
Fig. 34: *Perception of neighbourhood crime level, by area*



Voluntary Work and Care Work

33% of SA17 respondents indicate that they had undertaken voluntary work in the past month, a proportion which is not significantly different from one year ago. Volunteerism is proportionately lowest among 35-44 year olds but, that exception aside, volunteer activity tends to increase with increased age.

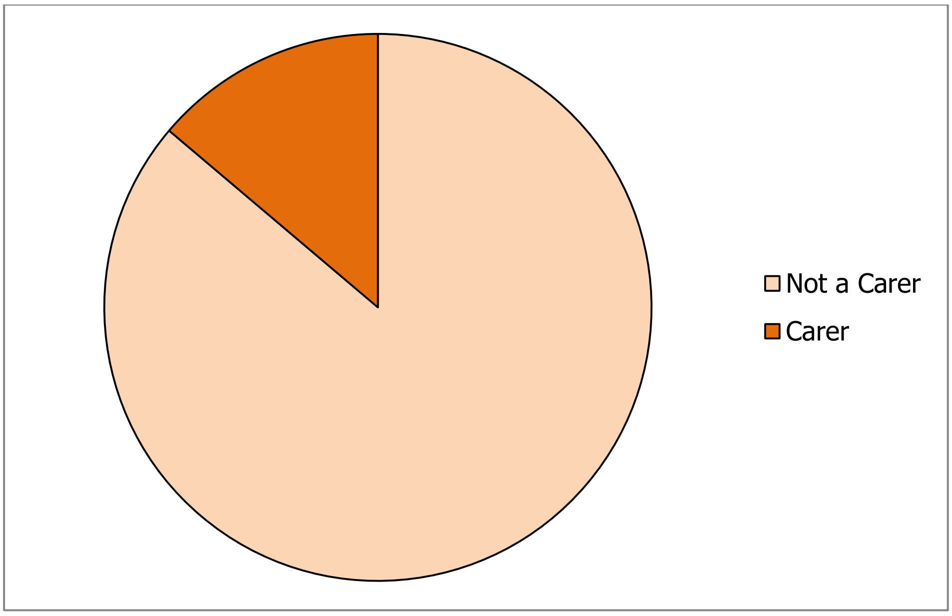
Fig. 35: *Voluntary work, by age group*



Educational, cultural, sports or professional volunteer activities are the most common (26% of all respondents), while community and social services volunteering is less prevalent (19%).

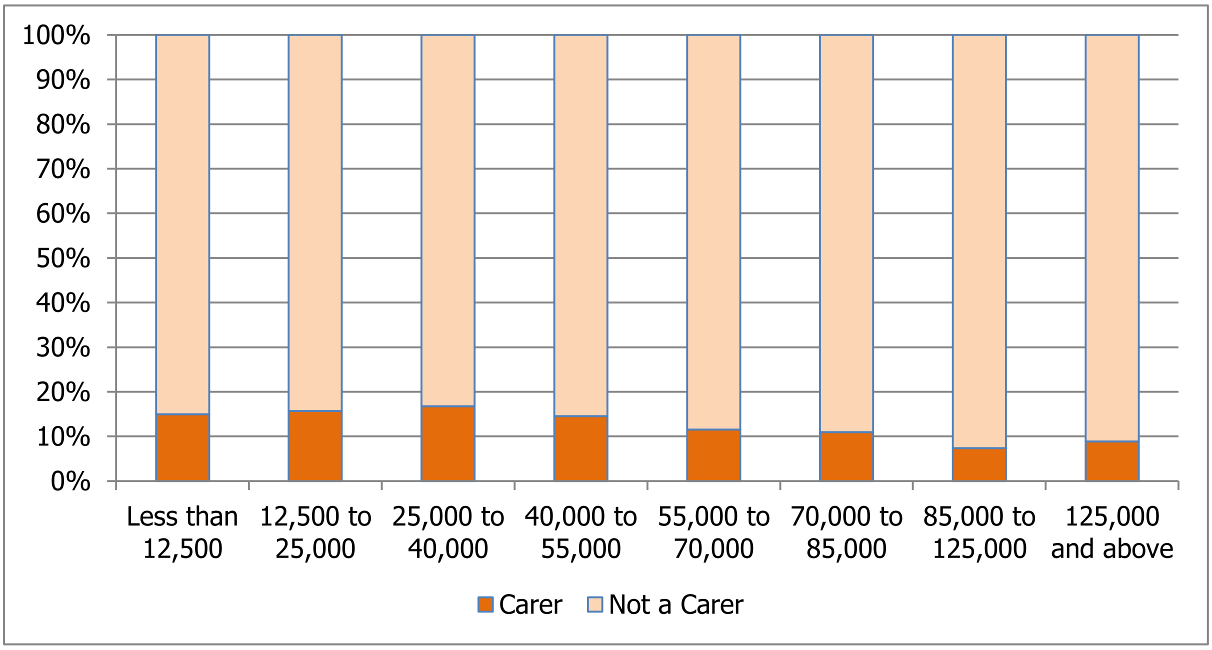
14% of respondents describe themselves as a carer for someone else, a proportion which is very similar to survey results from one year ago. SA17 did not ask respondents about the nature of their care work, but results from the 2016 survey suggest that 47% of carers are caring for children other than their own, and an approximately equal proportion are caring for elderly or disabled relatives.

Fig. 36: *Care work*



91% of respondents who describe themselves as carers indicate that they receive no support from either government or charity for their care work. Further, the likelihood of acting as a carer for someone else decreases with increased income, although this effect is small and relies upon small sample sizes.

Fig. 37: *Care work, by gross annual household income*

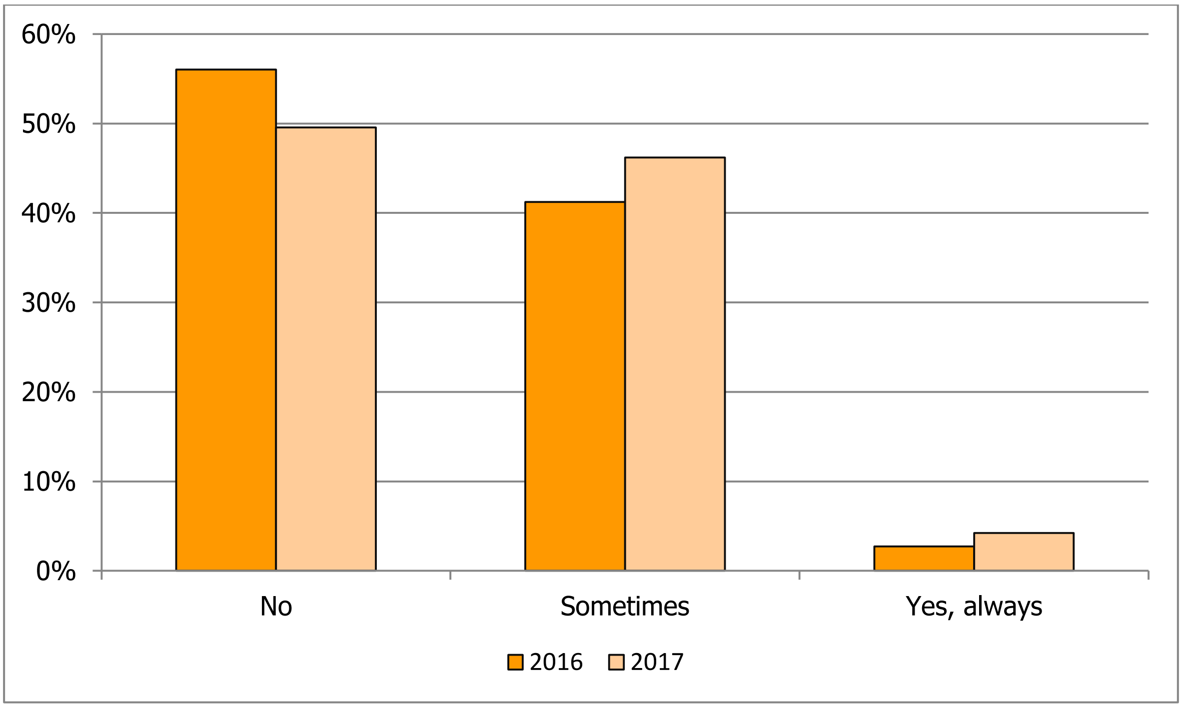


Civic Engagement

SA17 respondents were asked a series of questions probing the strength and character of civic engagement, and attitudes to government policy. The majority of these questions were also asked in the Social Attitudes 2016 survey.

Respondents were asked to respond to the statement "I feel that I am able to influence decisions affecting my local area." Self-reported perception of personal influence has improved slightly in the past year. Only a minority of respondents (4% in 2017) feel they can always exert personal influence over local decisions, but the proportion of those who feel they have no personal influence has declined by 7%.

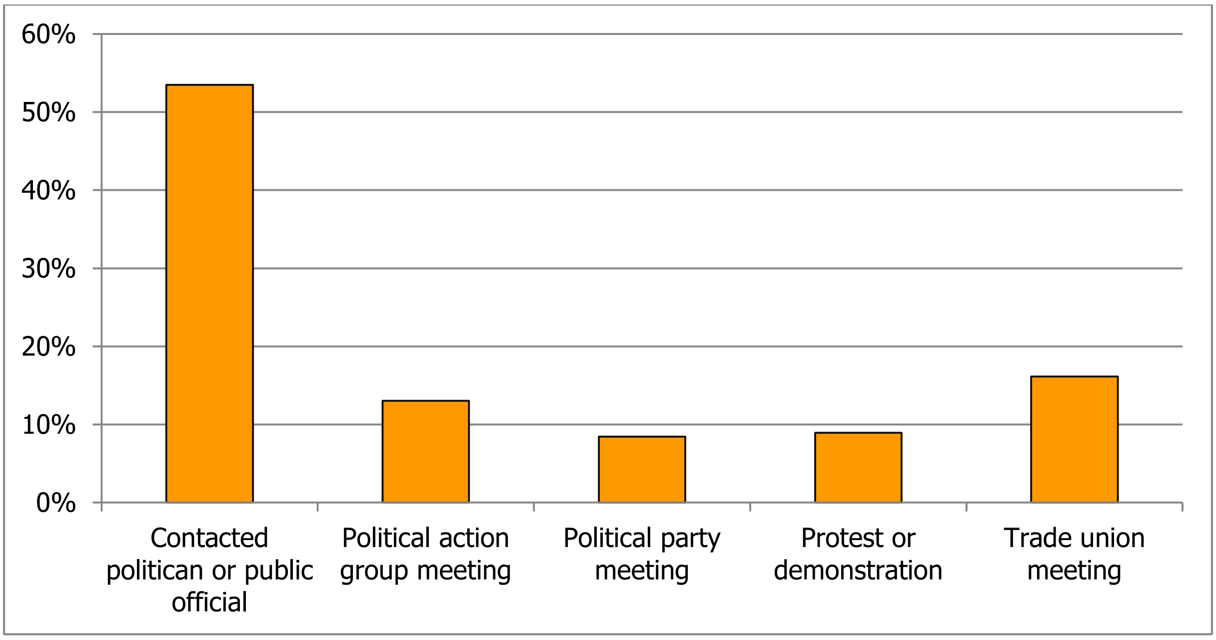
Fig. 38: *"I feel that I am able to influence decisions in my local area", 2016/17*



Specific civic engagement activities include *attending a meeting of a trade union*, a *meeting of a political party*, a *meeting of a political action group*, *attending a protest or demonstration*, and *contacting a politician or public official*. In the 2016 survey these five action categories were compressed into three items, such that the data is only loosely comparable with the results of the 2017 survey.

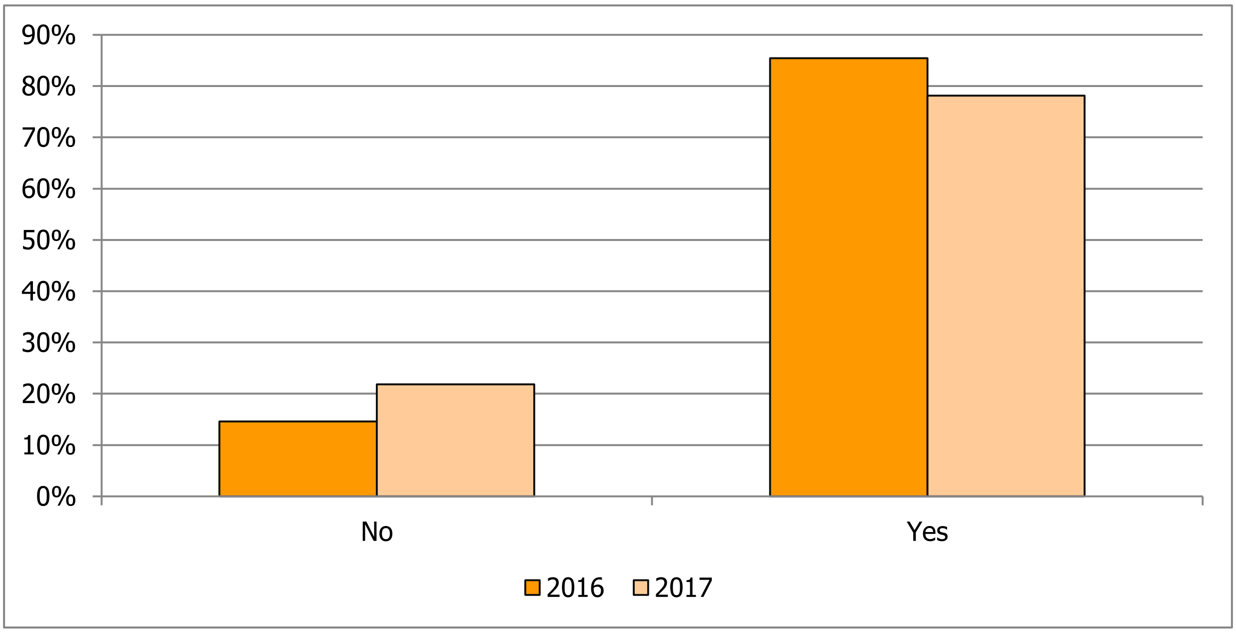
Overall, more than half of all self-reported civic activity in 2017 is accounted for by contacting a politician or public official (54% of all activity). The least frequent activity is attending a meeting of a political party (8%), which may be an artefact of the relative absence of traditional political parties on the Isle of Man.

Fig. 39: *Proportions of self-reported civic engagement activities*



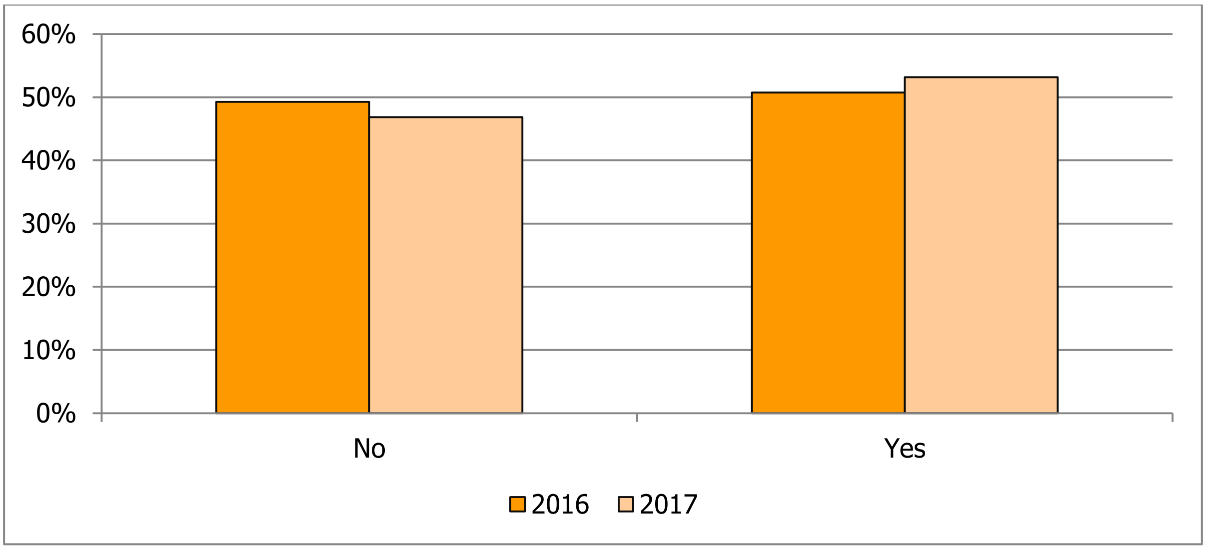
In the 2016 Social Attitudes survey, respondents were asked about the intention to vote in the September House of Keys election, while SA17 asked respondents whether or not they did vote. Stated pre-election intention to vote was 85%, while post-election self-reported voting behaviour was 78%. Actual voter turnout for the 2016 election was 53%.

Fig. 40: *Intention to vote in 2016 House of Keys Election, SA16 / Reported voting in 2016 House of Keys Election, SA17*



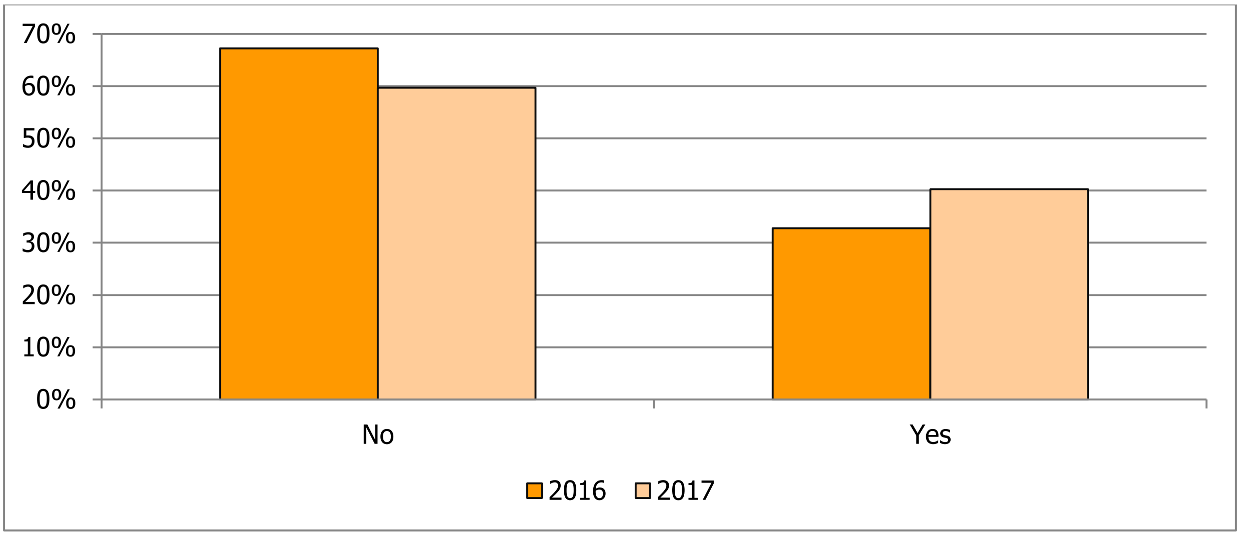
53% of respondents report signing a petition in the past twelve months, with no significant increase from one year ago (49% in 2016).

Fig. 42: *Signed a petition in the past 12 months, 2016/17*



However, there is a larger degree of year-on-year increase in the proportion of respondents who indicate that they have responded to a Government consultation in the past twelve months. In the 12 months prior to SA17, there were a total of 41 consultations issued to the public, while in the previous 12 months there was a total of 76.[1]

Fig. 43: *Responded to IOM Government consultation in past 12 months, 2016/17*



[1] Please see https://www.gov.im/consultations.gov?menuid=16918&type=closed&page=1 for a list of IOM Government consultations.

Respondents are consistently familiar with the names of their public representatives. 80% of respondents indicate that they know the name of either of their constituency Member of the House of Keys, and 60% know the name of at least one local authority/commissioner members. Neither of these figures are significantly different from one year ago.

Fig. 44: *Knowing the names of constituency MHKs, 2016/17*

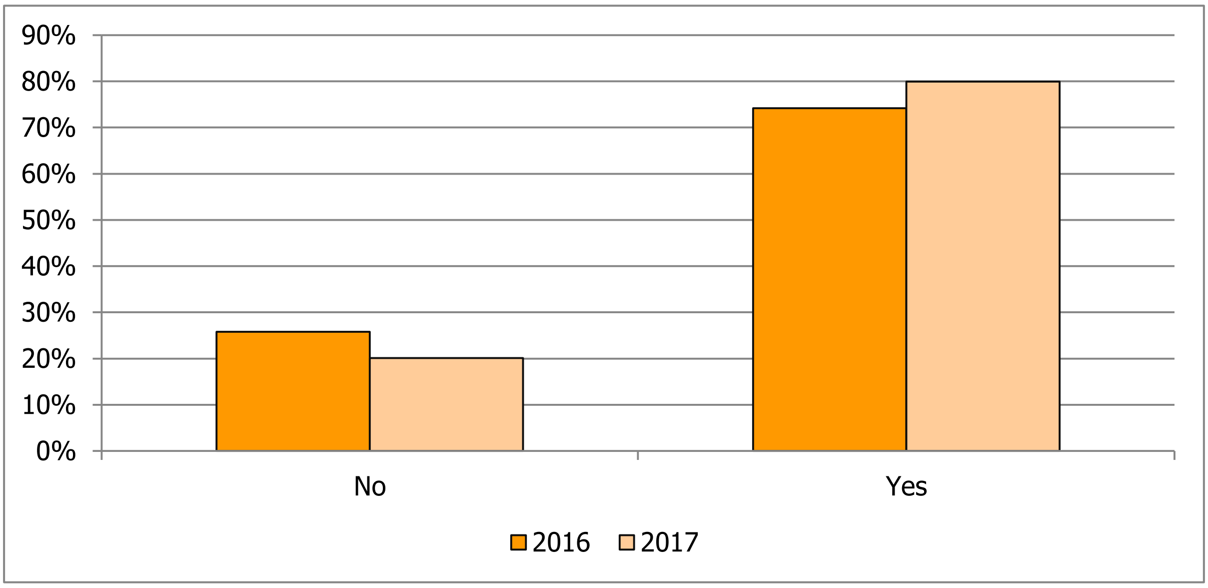
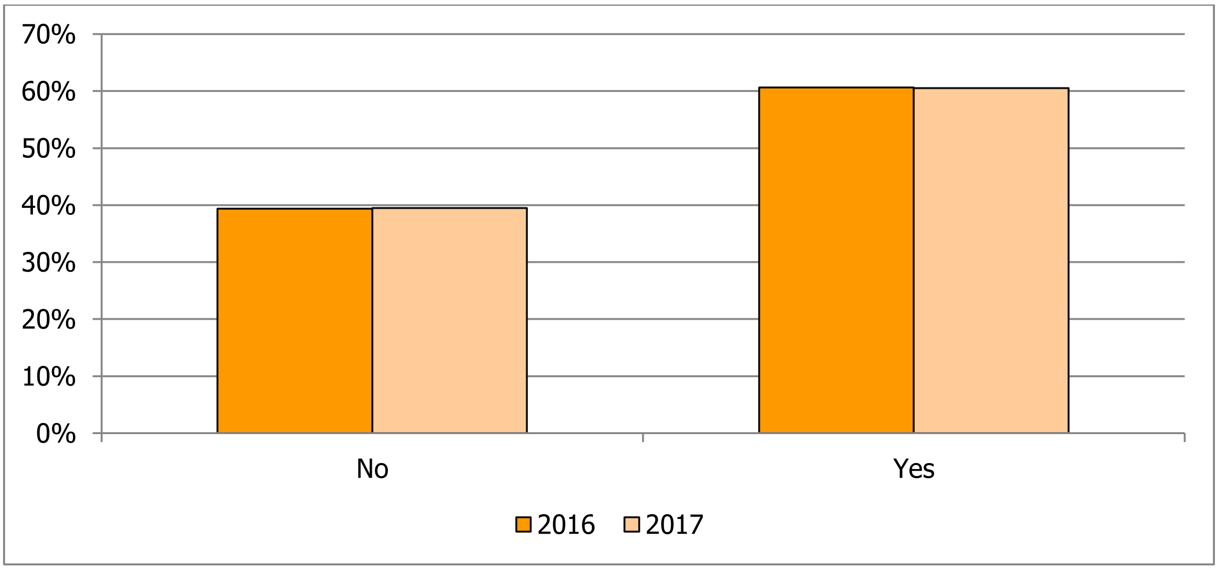
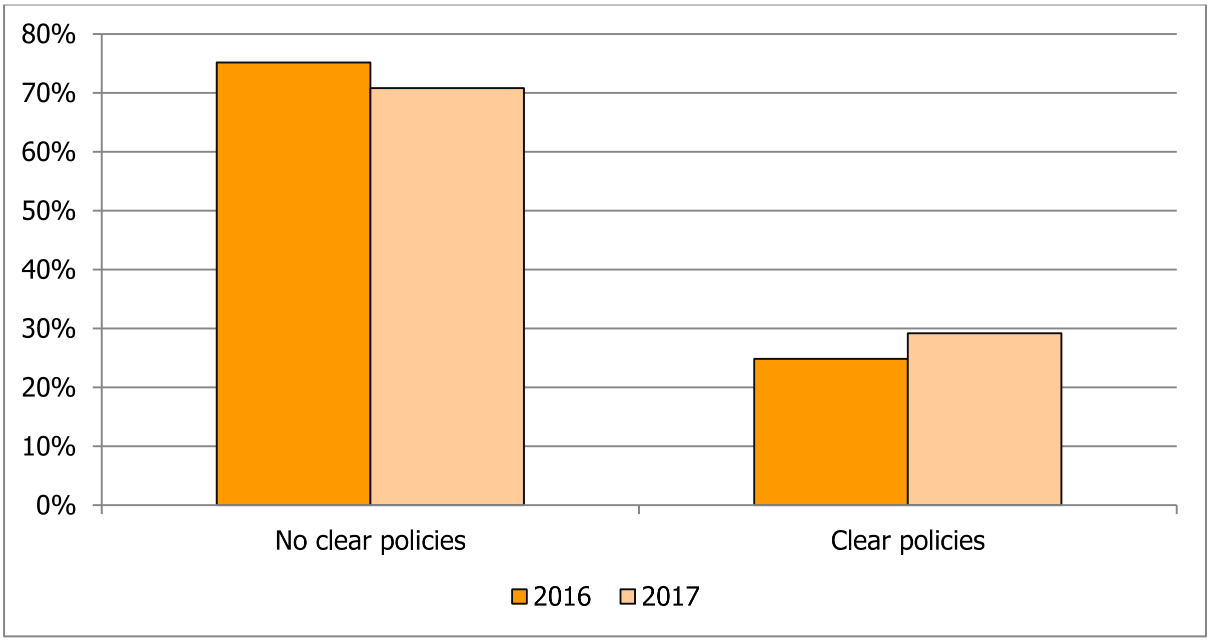


Fig. 45: *Knowing the names of local authority/commissioner members, 2016/17*



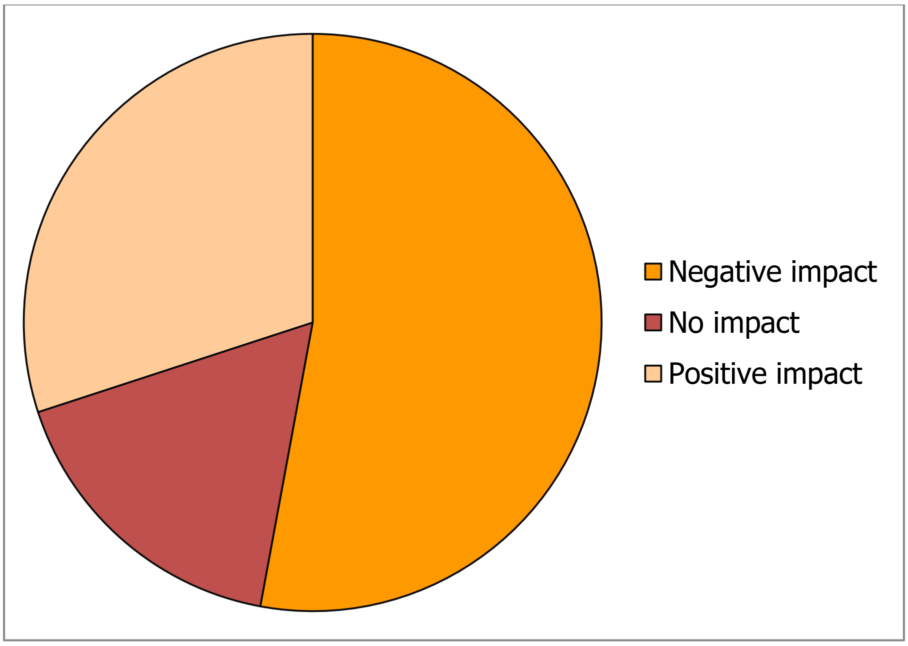
29% of respondents indicate the opinion that the current Isle of Man Government has clear policies. This represents a slight but statistically insignificant increase of 4% in the perception of the clarity of Government policy from one year ago.

Fig. 46: *"Do you believe the current Isle of Man Government has clear policies?", 2016/17*



Respondents were then asked if the policies of the current Isle of Man Government have a direct impact on their lives; those who responded 'Yes' were then asked if that impact was positive or negative. 17% of respondents felt that Government policies have no direct impact on their lives. Slightly more than half (53%) feel that Government policies have a negative impact on their lives, and 30% feel that the impact of Government policy is positive.

Fig. 47: *Perceived impact of government policies*



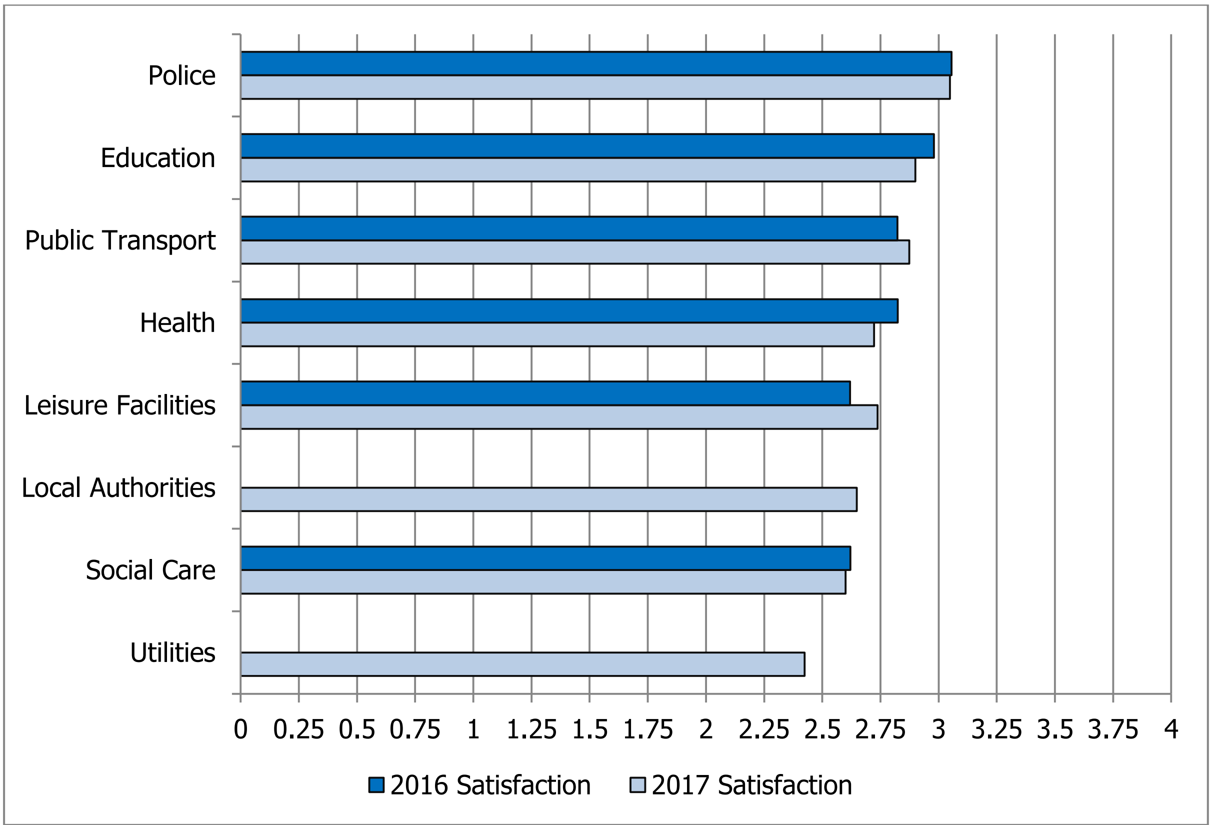
Satisfaction with Public Services

SA17 respondents were asked to indicate their level of satisfaction with eight areas of public service: *Health, Education, Social Care, Local Authorities, Public Transport, Police, Leisure Facilities,* and *Utilities (water, electricity, and broadband).* Of these areas, two were new to SA17 (*Local Authorities* and *Utilities*), while the other six were also queried in the Social Attitudes 2016 survey.

Respondents were asked to indicate whether they were 'Very dissatisfied', 'Dissatisfied', 'Satisfied', or 'Very satisfied' with each area of public service. These responses were assigned numeric scores, with the lowest at 1 ('Very dissatisfied') and the highest at 4 ('Very satisfied'). Scores out of 4 were then averaged across all respondents to derive a mean satisfaction score for each area of public service. This computation was repeated for both 2016 and 2017 results to allow for comparison.

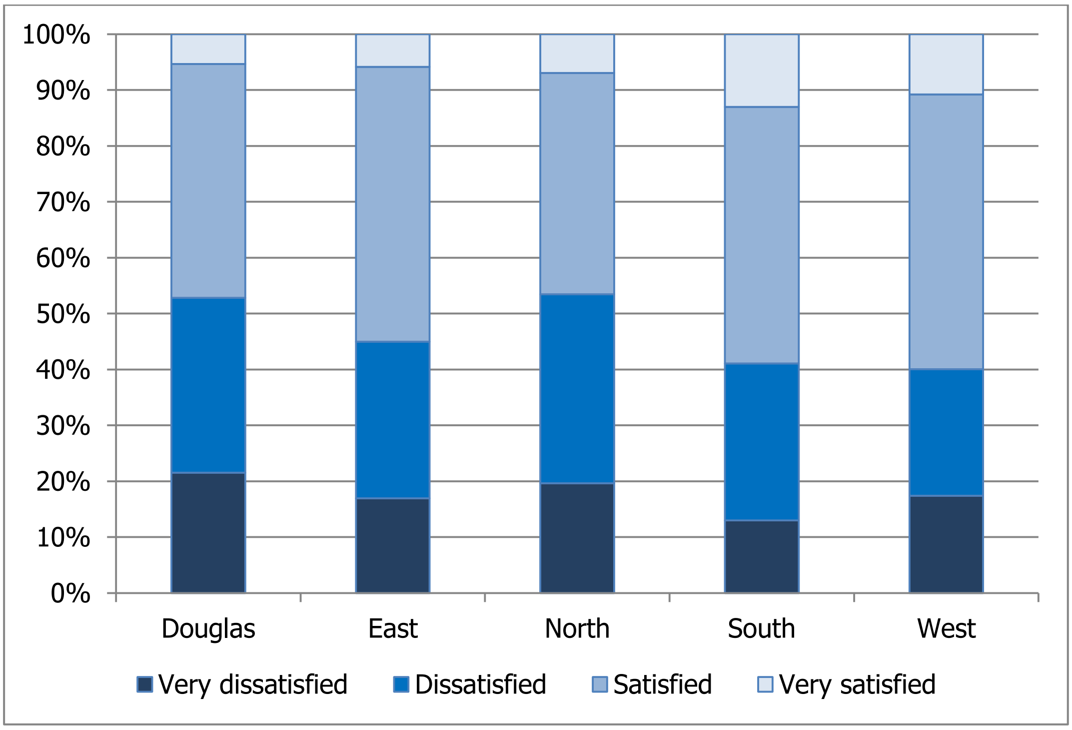
Overall, satisfaction with public services has remained highly consistent over the past year. Police services return the highest average scores (3.1/4) and the lowest scoring service, Utilities, is rated at 2.4/4. Rank order of services from most to least satisfactory has not changed from one year ago.

Fig. 48: *Average satisfaction with public services, 2016/17*



Utilities (water, electricity, and broadband) was introduced to the public services index in 2017, and it bears the lowest satisfaction rating. Public satisfaction with utilities is related to area of residence on the Island. The highest satisfaction with public utilities is in the West and South of the Island, where satisfaction is indicated at an average of 60%. The lowest level of satisfaction is indicated in Douglas, where general satisfaction is 47%.

Fig. 49: *Satisfaction with utilities services, by area*

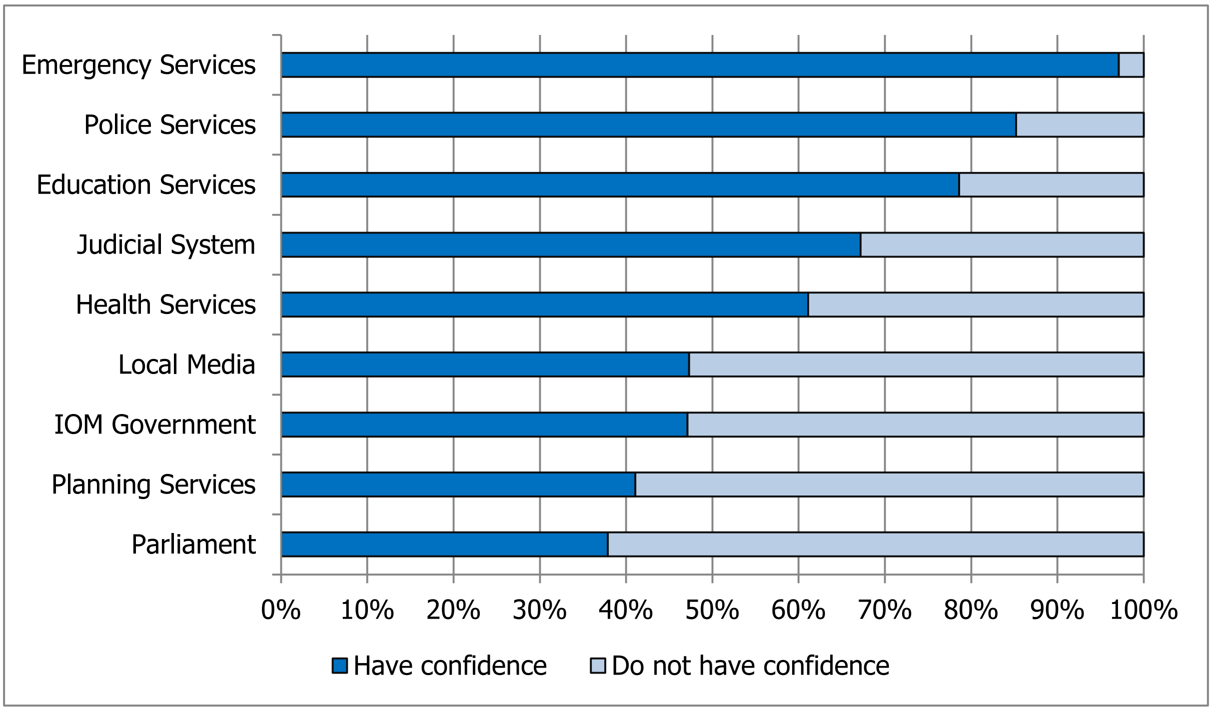


Institutional Trust and Public Confidence

SA17 respondents were asked a series of questions measuring institutional trust; they were asked if they had confidence in a list of public institutions: the *Isle of Man Government, Parliament, Judicial Systems and Courts, Local Media, Health Service, Education Service, Planning Services, Emergency Services,* and *Police Services*. The institutional trust matrix was also used in the Social Attitudes Survey 2016, but 2017 included Planning Services and Police Services as two new items.

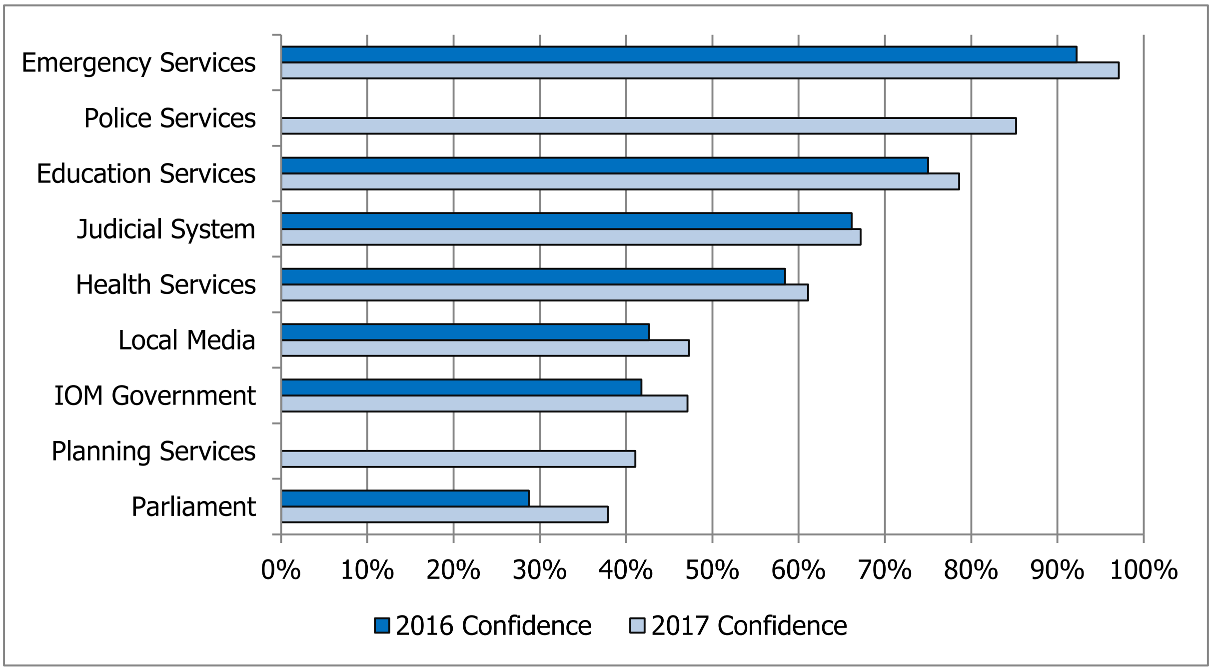
The highest degree of public confidence or trust is associated with Emergency Services, as 97% of respondents indicate that they have confidence in that institution. Parliament (Tynwald, the House of Keys, and the Legislative Council) attracts the lowest level of confidence (38%). The breadth of this range – 59% - suggests that institutional trust is highly variable on the Island.

Fig. 50: *Public confidence in institutions*



However, in contrast to the high consistency seen in satisfaction with public services, trust in public institutions shows several significant differences between 2016 and 2017. In particular, it should be noted that although the Government and Parliament are rated lowest on the scale of confidence (omitting Planning Services, which was not asked in 2016), these two institutions have also achieved the largest gains in public confidence in comparison to one year ago, prior to the September 2016 election.

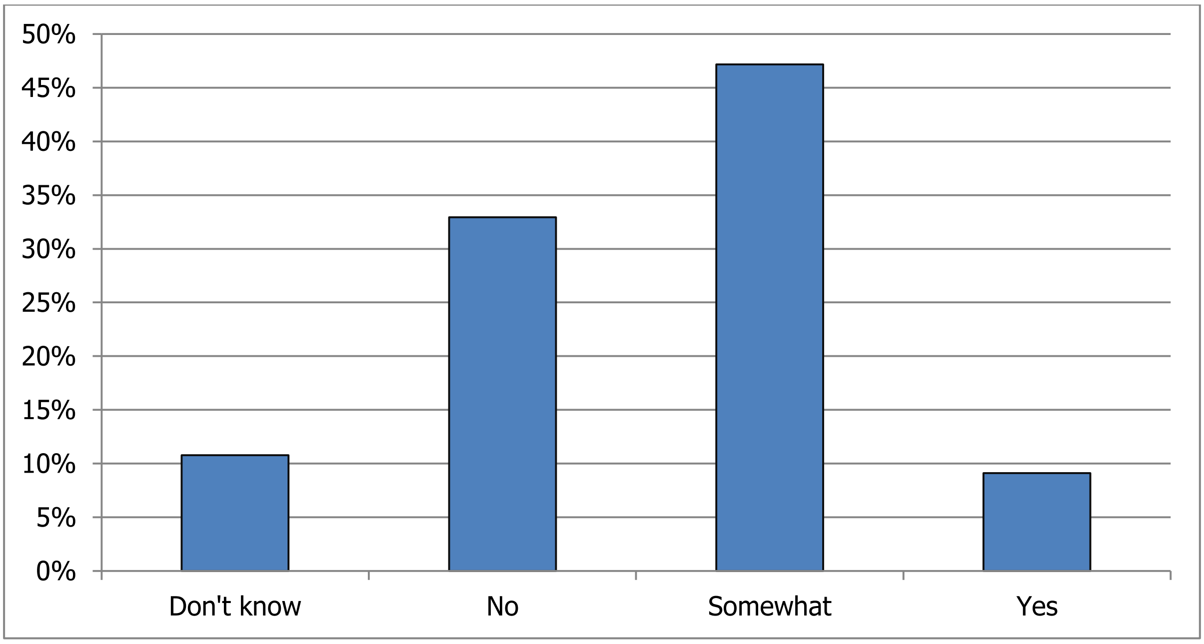
Fig. 51: *Public confidence in institutions, 2016/17*



Consumer Protection Regulation

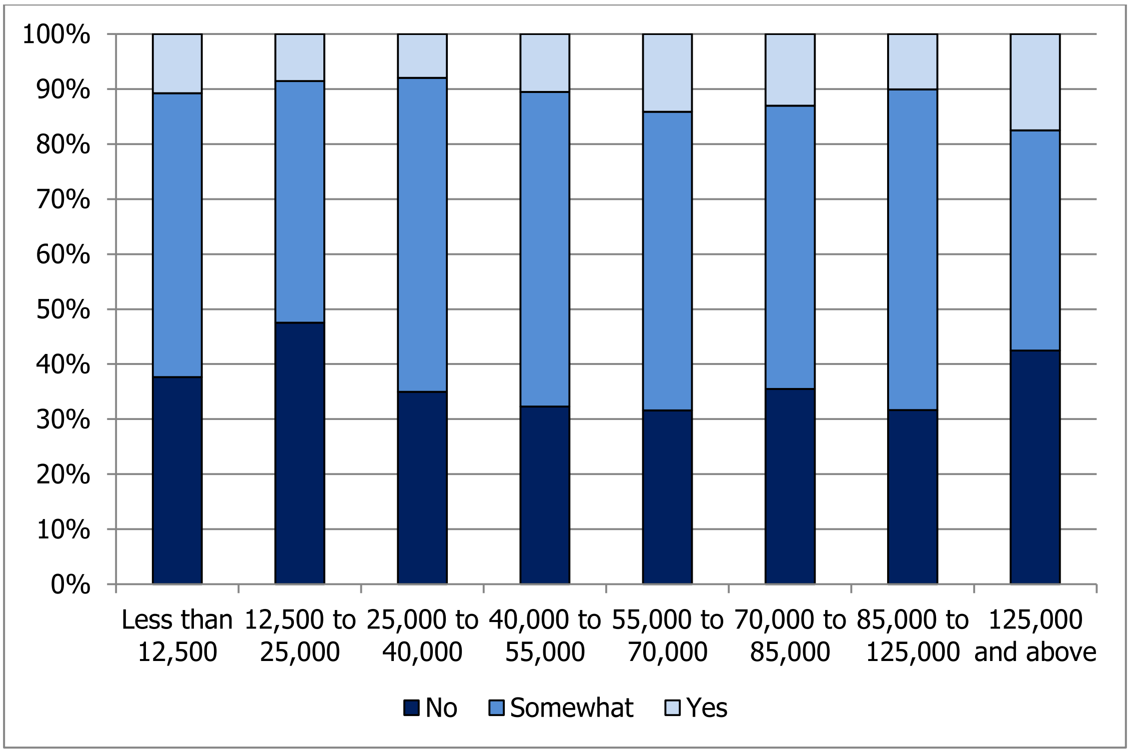
When asked *"Do you believe that the current Isle of Man Government regulates effectively to protect consumers?"*, 11% of SA17 respondents were unable to offer a response, and one in three responded in the negative. Nearly one half (47%) feel consumer protection regulation to be 'somewhat' effective, and fewer than one in ten (9%) feel that regulation is effective.

Fig. 52: *"Do you believe that the current Isle of Man Government regulates effectively to protect consumers?"*



The perception of the effectiveness of consumer protection regulation is partly determined by one's annual household income. Notably, respondents from both the lowest and the highest household income categories are equally likely to feel that consumer protection regulation is ineffective, although respondents at the highest income level are also most likely to hold the opposite attitude (18% Yes).

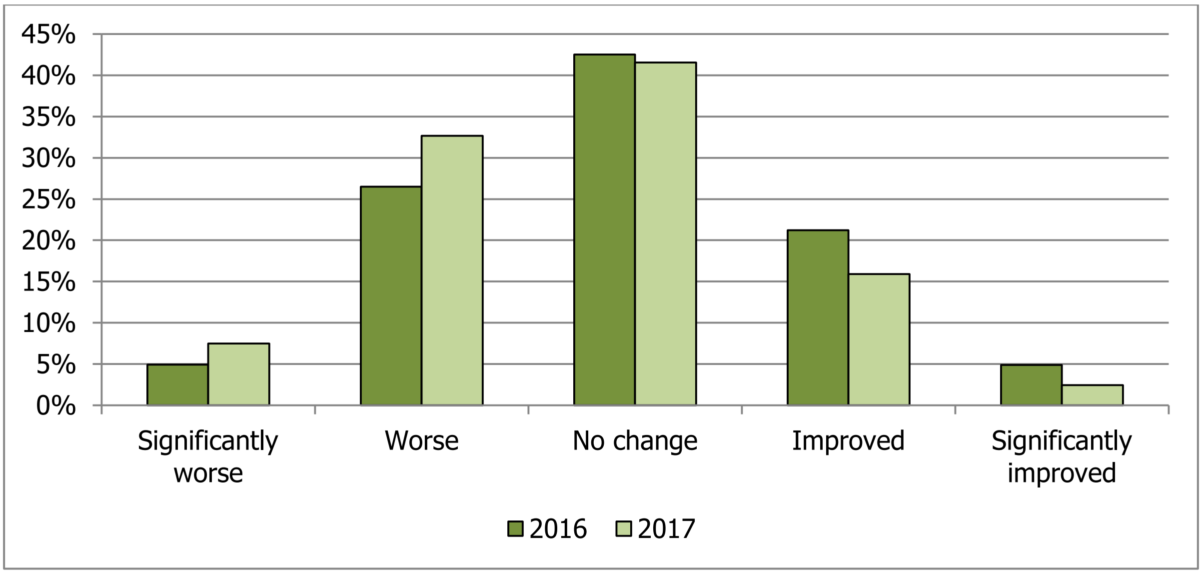
Fig. 53: *Perception of consumer protection regulation, by gross annual household income*



Financial Outlook

Household financial optimism is lower on the Island in comparison to one year ago. The percentage of respondents who indicate that their household financial situation has improved in the past 12 months declined by 8% in 2017, and the proportion of respondents who state that their financial situation has worsened increased by 9%. The majority of respondents (42%) indicate that their household financial situation has not changed.

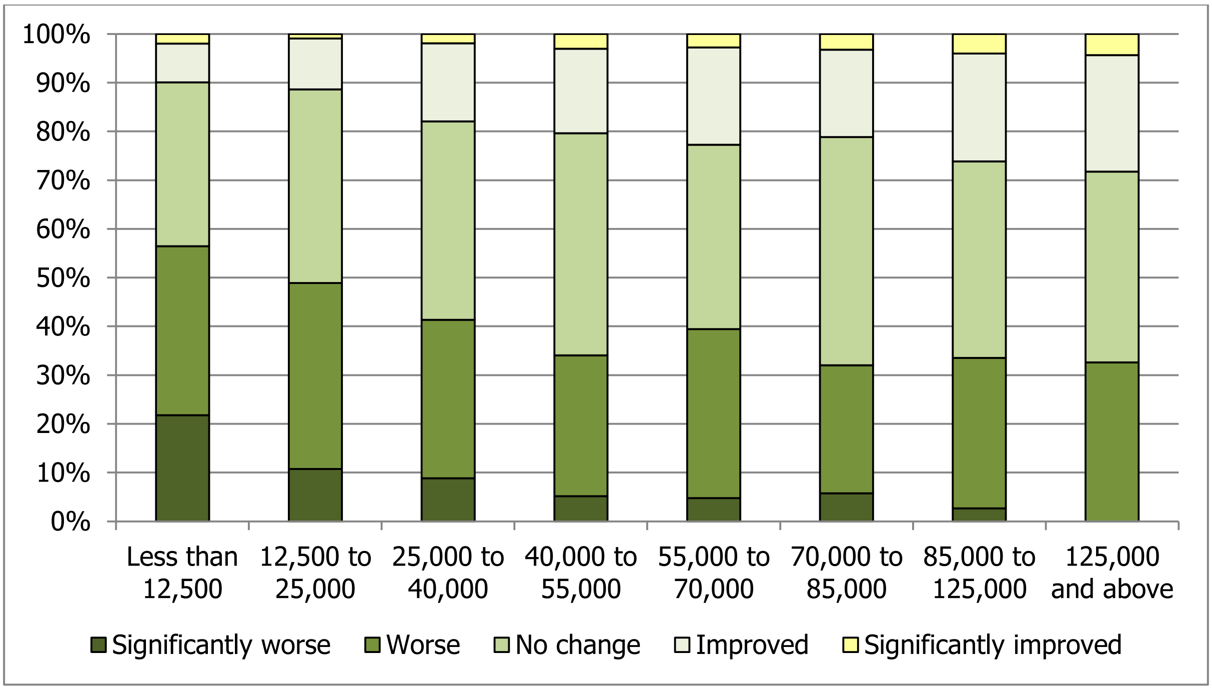
Fig. 54: *"Looking back 12 months, how would you describe your household's financial situation today?", 2016/17*



People in different income brackets indicate different experiences in relation to financial outlook. While 'significant improvement' in finances over the past twelve months is rarely reported in any income category, the perception of any improvement over the past twelve months increases with higher income, from one in ten households at the lowest income level, to over one in four households at the highest level.

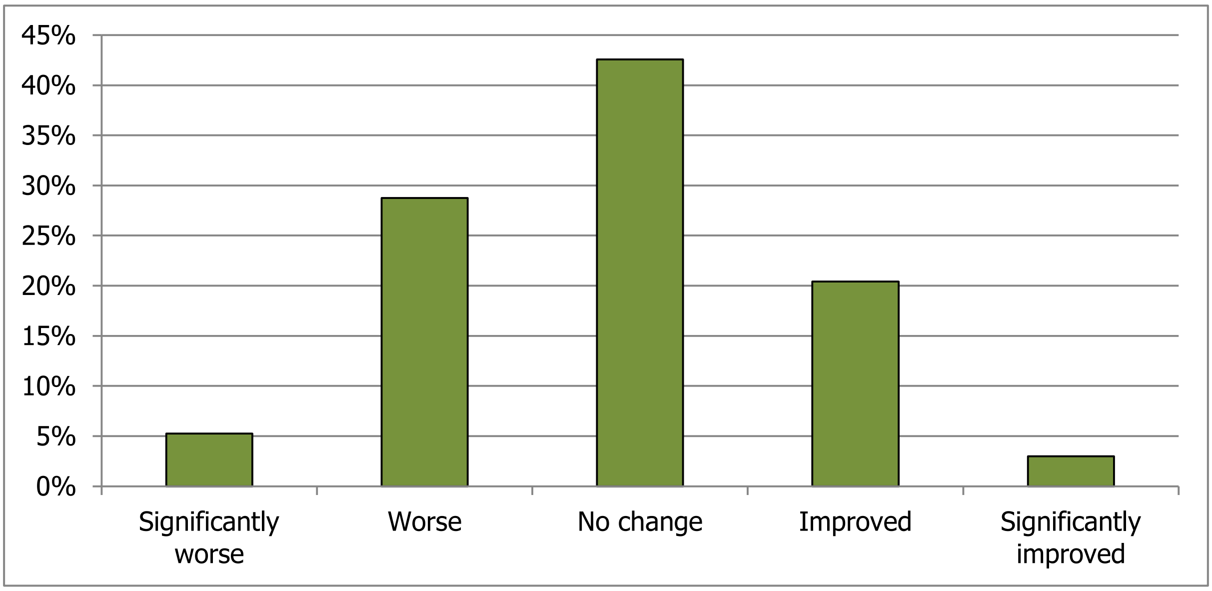
At the bottom of the improvement scale, perceived decline in household finances affects all income levels: at every level of household income, a larger proportion of households report themselves to be worse off in the past year than better off. However, for households below the median income category (£40,000 - £55,000), financial difficulty rises steeply with every step down on the income ladder. Half of all households between £12,500 - £25,000 feel themselves to be in financial decline, and for households at the lowest income level the proportion of people in difficulty rises to three in five.

Fig. 55: *Looking back 12 months, how would you describe your household's financial situation today?", by gross annual household income*



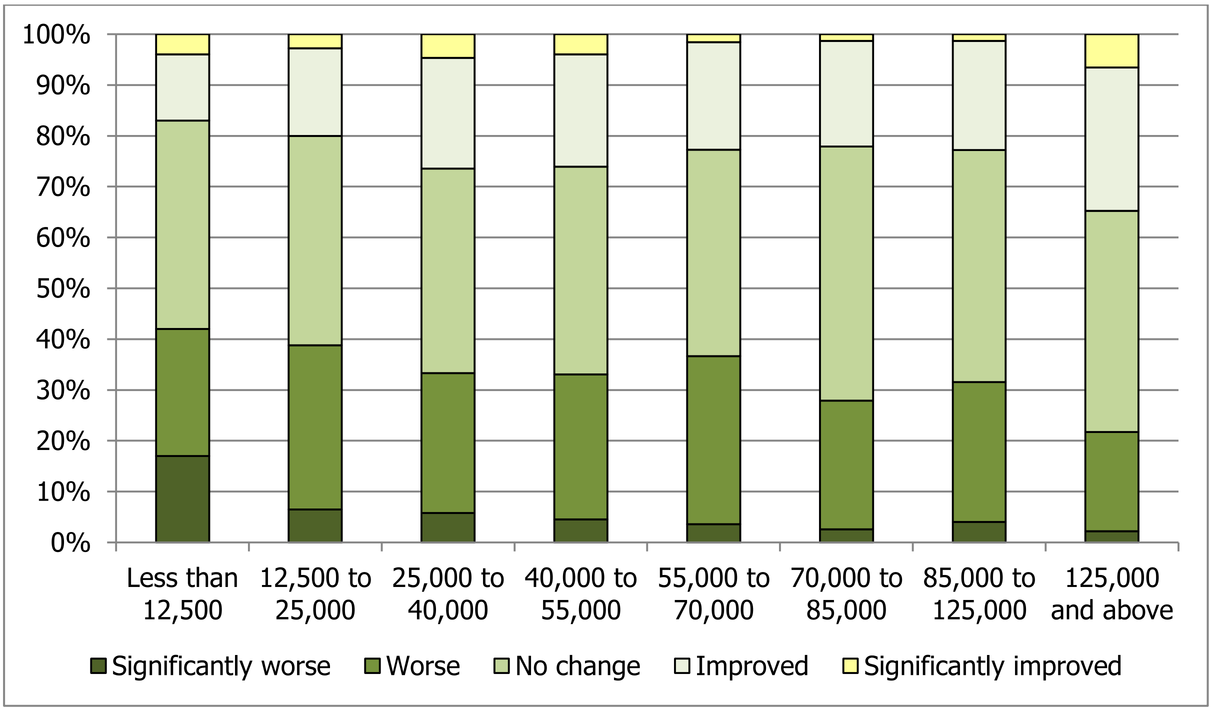
To provide more context for household financial change, the 2017 Social Attitudes Survey also included a financial optimism measure, asking respondents what their expectations were for their household finances 12 months into the future. In this case, optimism for the future closely mirrors the experience of household finances over the past year. Nearly half (43%) of household anticipate no change to their financial situation in the next year, and more respondents anticipate decline (32%) than improvement (23%).

Fig. 56: *"Looking forward 12 months, how would you expect your household's financial position to be relative to today?"*



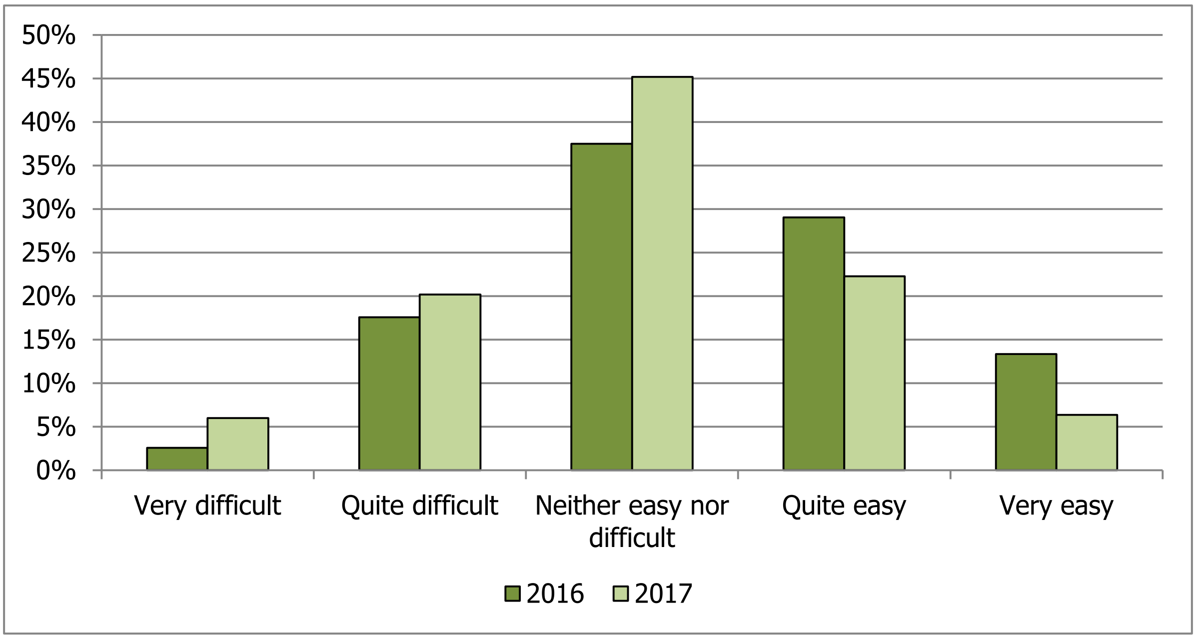
However, when financial optimism is examined by income category, the lowest income categories show that nearly one in five households anticipate at least some improvement over the next 12 months. Roughly one in four households in middle income categories indicate expectations of improvement. Households at the highest level of income report the highest expectations of financial improvement (35%).

Fig. 57: *Looking forward 12 months, how would you expect your household's financial position to be relative to today?", by gross annual household income*



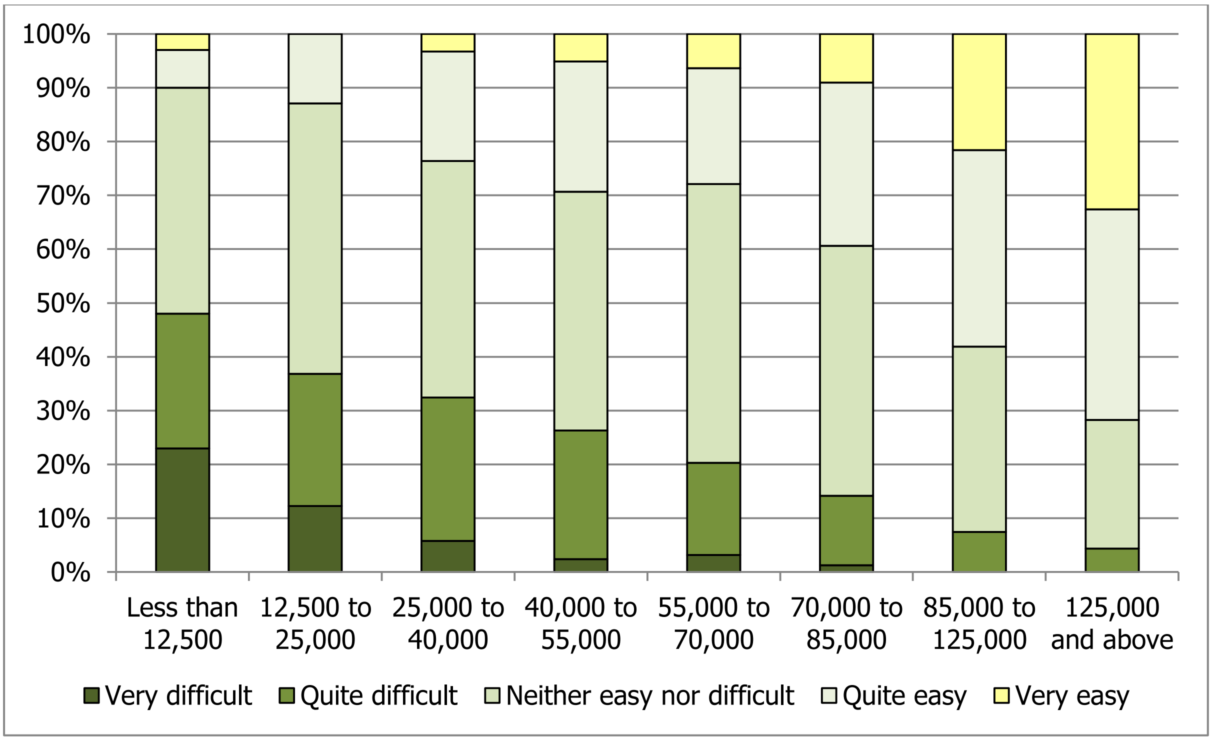
In comparison to one year ago, significantly fewer survey respondents are likely to indicate that their household finds it 'easy' or 'very easy' to cope financially; the proportion has dropped from 42% in 2016 to 29% in 2017. Much of the change in financial coping has shifted to the centre, since the proportion of respondents who find it 'neither easy nor difficult' to cope financially has increased by 8%.

Fig. 58: *"As a household, how difficult do you find it to cope financially?", 2016/17*



Nearly half (48%) of households at the lowest income level find it 'difficult' or 'very difficult' to cope financially. As may be expected, financial coping capability increases in relation to income.

Fig. 59: *"As a household, how difficult do you find it to cope financially?", by gross annual household income*



Respondents were given a list of household expenses and asked about the extent to which their families found it difficult to pay for each item due to a shortage of money.

In general over the past year, the trend shown by the affordability of household expenses is that all items are a little more unaffordable, and large single-expense items, such as holidays and unexpected expenses, are significantly more difficult to pay for. Moreover, unexpected expenses are now a greater concern than they were one year ago, surpassing voluntary large expenses like holidays. Nearly two-thirds (60%) of respondents indicate that their families do, or sometimes do, have difficulty in meeting unexpected expenses.

Fig. 60: *Difficulty affording household expenses, 2016*

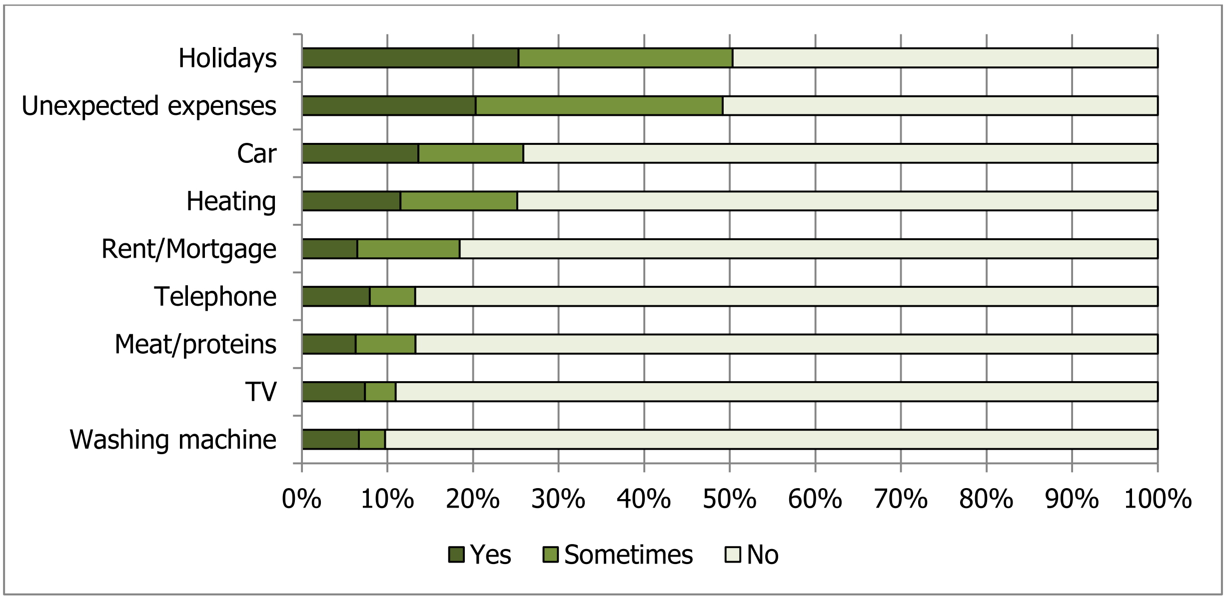
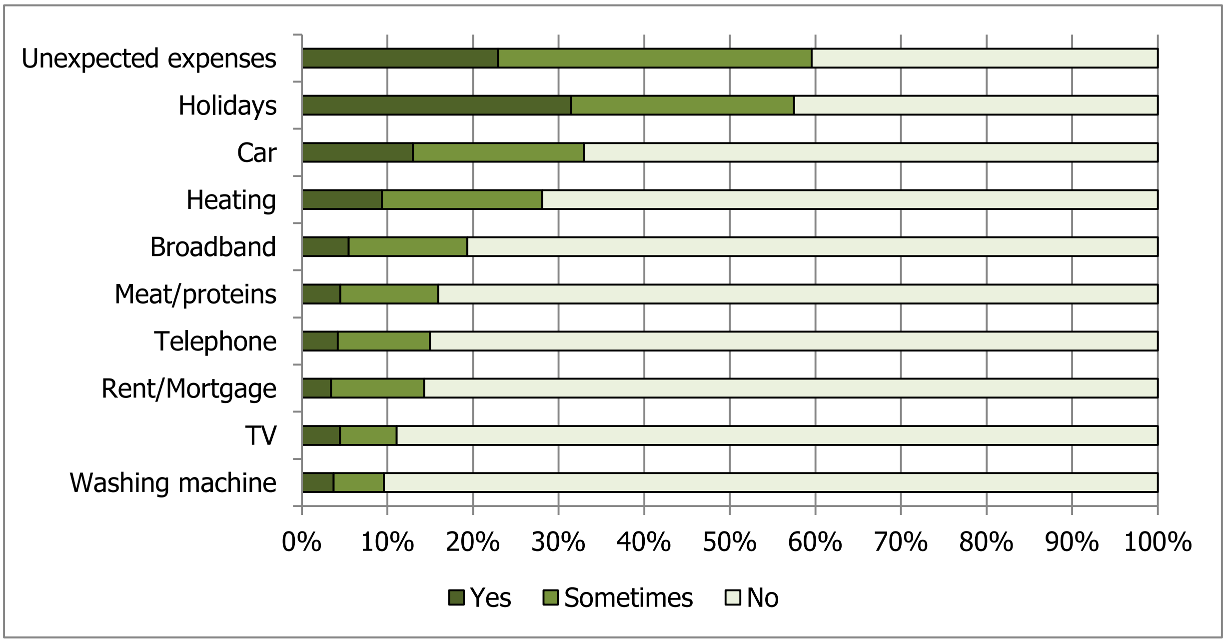


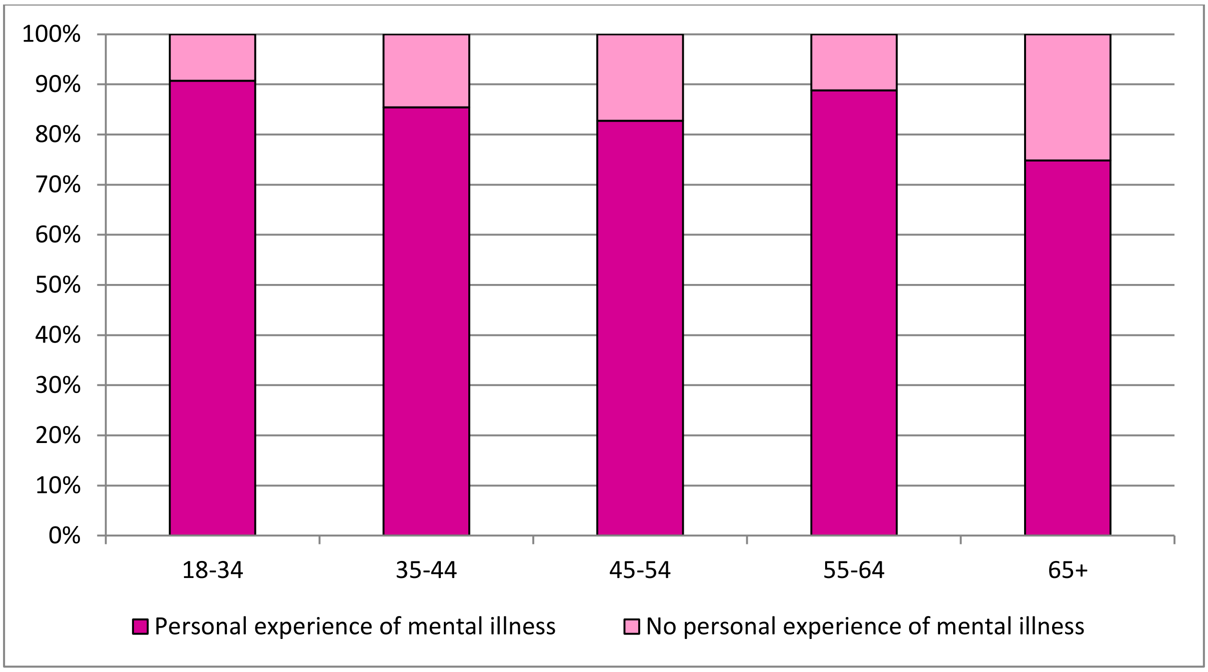
Fig. 61: *Difficulty affording household expenses, 2017*



Mental Health

A significant majority of respondents (84%) indicate that they personally know someone who has ever experienced a mental health problem. Respondents who are beyond the age of retirement are proportionately less likely to report personal experience with mental health problems, which may be indicative of lower public awareness or social stigma among this age group. Similarly, men are nearly 20% more likely than women to indicate that they do not personally know someone who has experienced a mental health problem.

Fig. 62: *"Do you personally know someone who has ever experienced a mental health problem?", by age group*



Respondents were asked two attitudinal questions regarding social proximity to and authoritative trust of individuals who may be experiencing an unspecified mental health issue. These questions were drawn from the Scottish Social Attitudes Survey 2013. Respondents were asked to indicate their level of agreement with the following two statements: "*I would not want to live next door to someone with a mental health problem*" and "*People with mental health problems should not be allowed to do important jobs such as doctors, politicians, or teachers*". Disagreement with these statements indicates a higher level of tolerance.

SA17 respondents indicate generally tolerant attitudes to mental health issues in their neighbours, although they are less tolerant of mental health issues in trusted professionals. Only 16% of respondents 'agree' or 'strongly agree' that they would not want to live next door to someone with mental health problems, but in reference to professionals in positions of care or authority, that proportion nearly doubles, and approximately one in three respondents (30%) indicate the attitude that individuals with mental health problems should not be allowed to do important jobs.

Fig. 63: *"I would not want to live next door to someone with a mental health problem."*

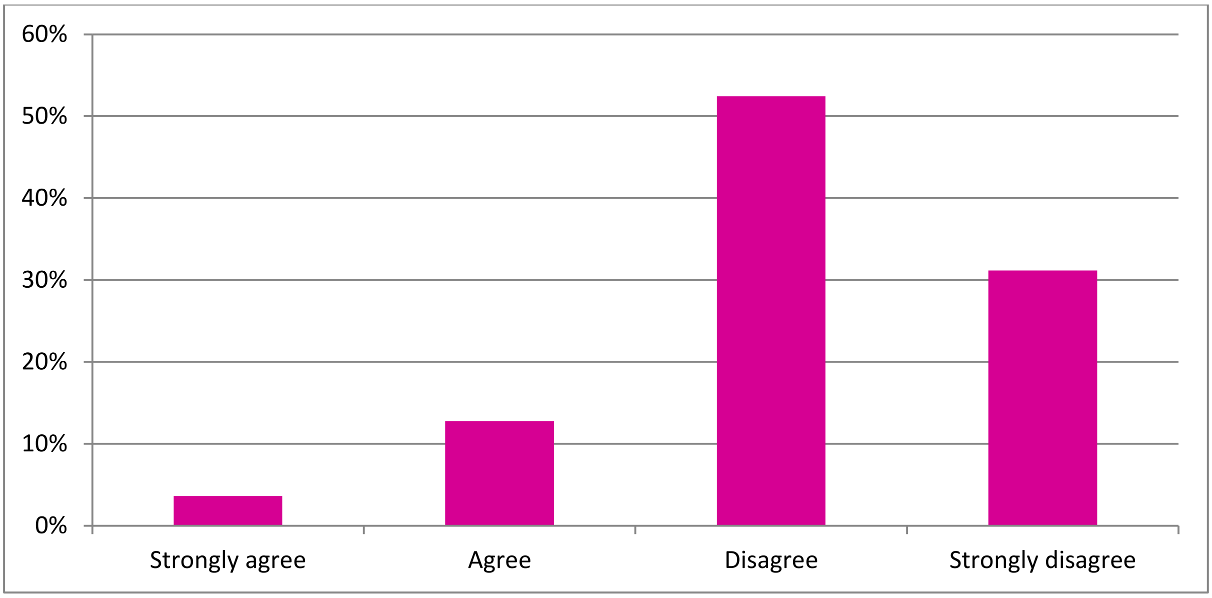
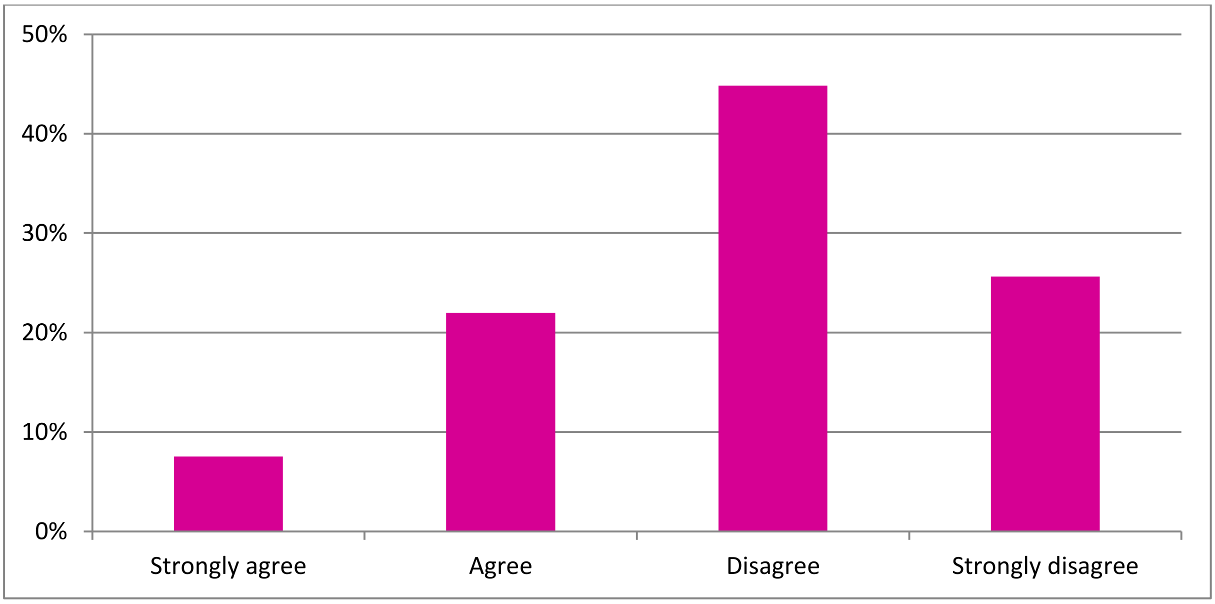
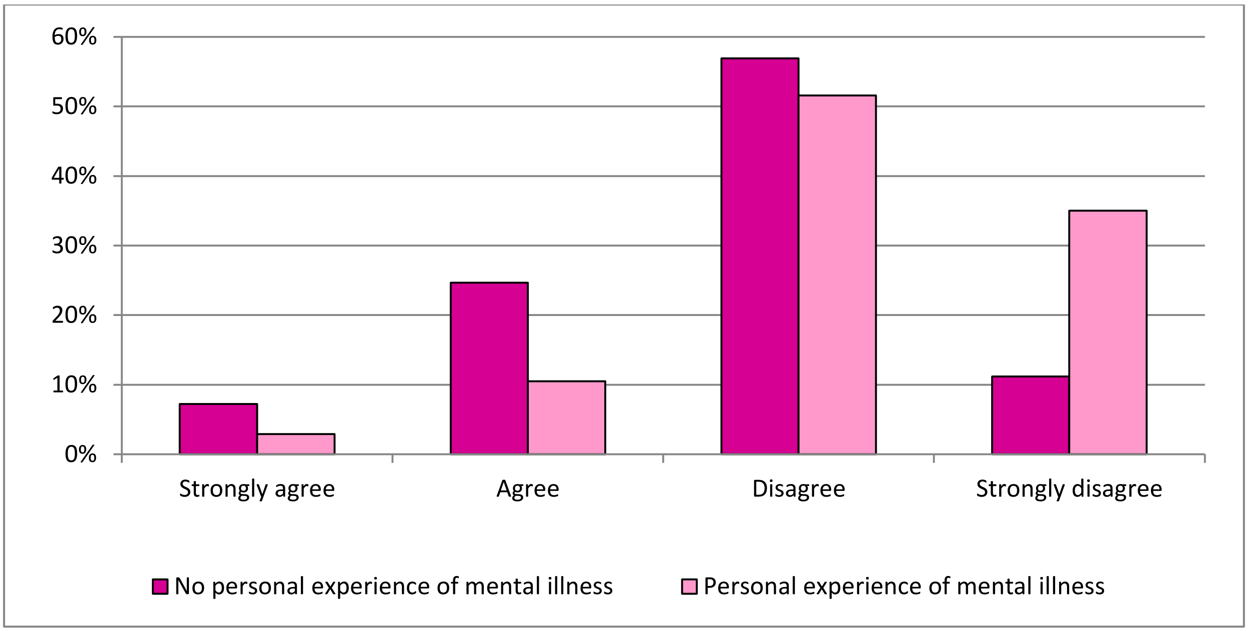


Fig. 64: *"People with mental health problems should not be allowed to do important jobs such as doctors, politicians or teachers."*



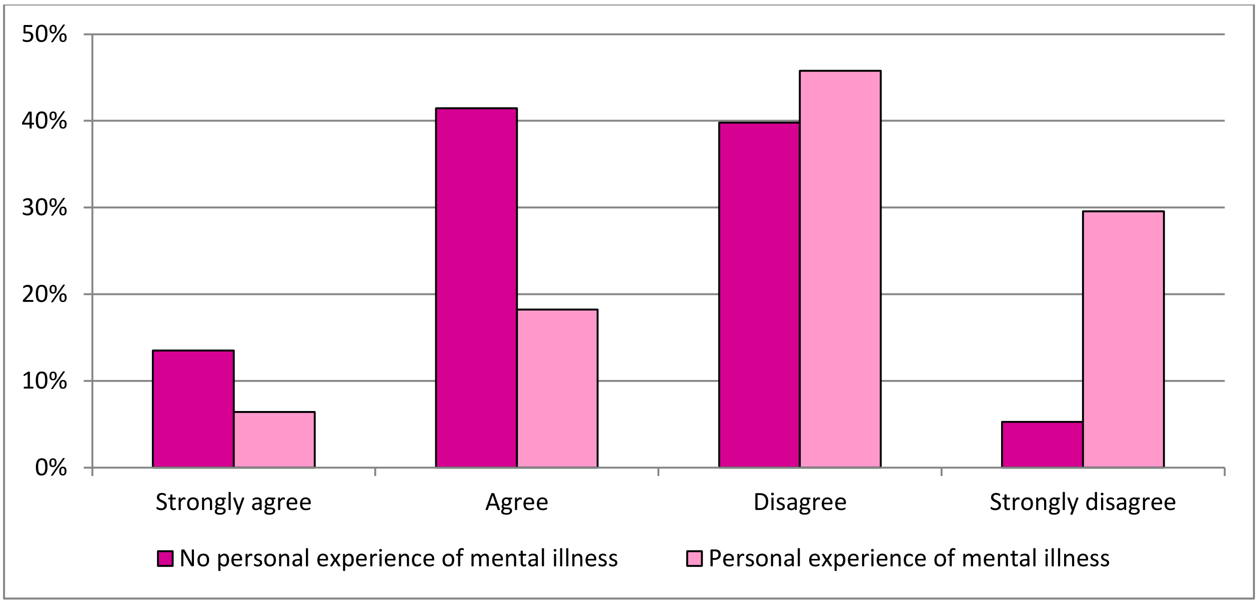
The best predictor of tolerance for mental health issues in either neighbours or trusted professionals is personal experience of mental health issues. As stated above, the great majority of SA17 respondents report personally knowing someone was has ever experienced a mental health problem, but those who have no personal experience or familiarity with mental illness are twice as likely to indicate that they would not want to live next door to someone with a mental health problem.

Fig. 65: *"I would not want to live next door to someone with a mental health problem", by personal experience of mental illness*



This effect is even more prevalent in regard to tolerance of mental illness in professionals. More than half (55%) of respondents who have no personal experience of mental illness report the attitude that individuals with mental health problems should not be allowed to do important jobs.

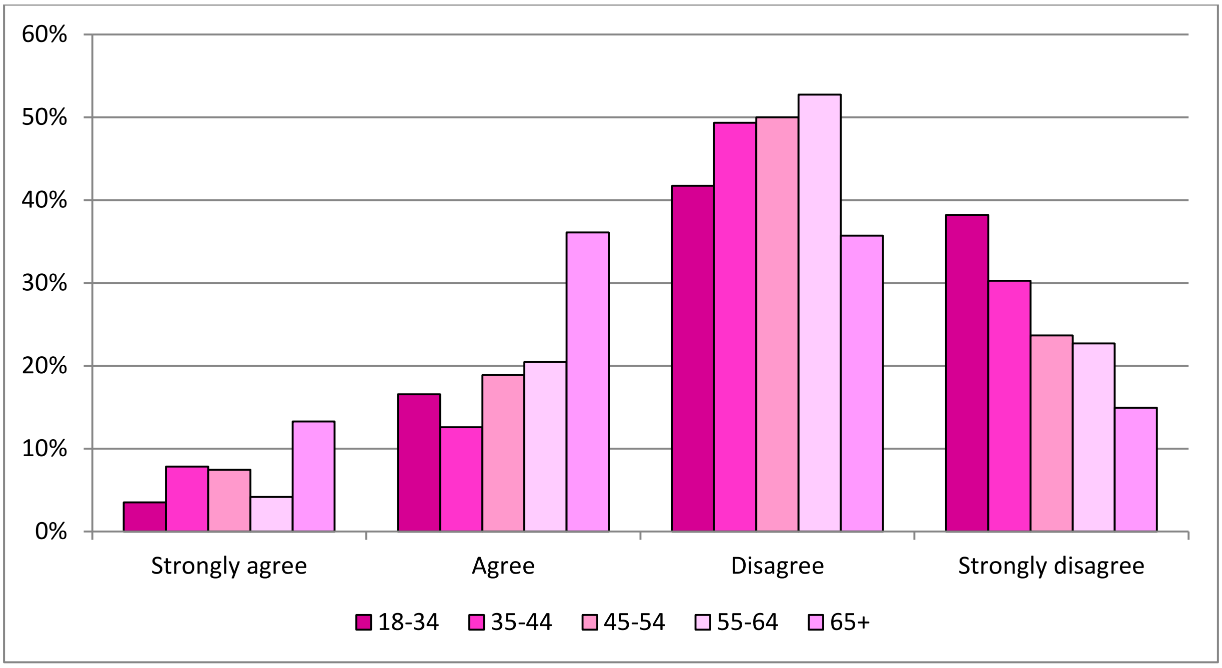
Fig. 66: "*People with mental health problems should not be allowed to do important jobs such as doctors, politicians or teachers", by personal experience of mental illness*



Other statistically significant correlates of attitudes to mental health are age and gender. When it comes to neighbours, although respondents of all age groups return similar tolerance scores on average, the youngest group (18-34) are disproportionately likely to 'strongly disagree', while respondents past the age of retirement are among the least likely to hold highly tolerant attitudes (42% vs 28%, respectively).

However, age is a stronger factor in attitudes to the mental health of trusted professionals. Half (49%) of respondents aged 65+ 'agree' or 'strongly agree' that people with mental health problems should not be permitted to hold important jobs, while only one in five respondents aged 18-34 indicate a similar attitude. Highly tolerant attitudes to professionals with mental health issues – the 'strongly disagree' group – show a steadily declining slope correlating to increased age.

Fig. 67: "*People with mental health problems should not be allowed to do important jobs such as doctors, politicians or teachers", by age group*



Finally, females are more likely to profess tolerant attitudes to mental illness than males. The margin of difference, though statistically significant, is small in the case of neighbours: only 12% of female respondents would not want a neighbour with mental health problems, as compared to 21% of men. However, as seen above with other correlative factors, the tolerance gap widens in the case of professionals: 22% of female respondents are intolerant of mental health issues in trusted professionals, while nearly one in four (37%) of male respondents indicate low tolerance.

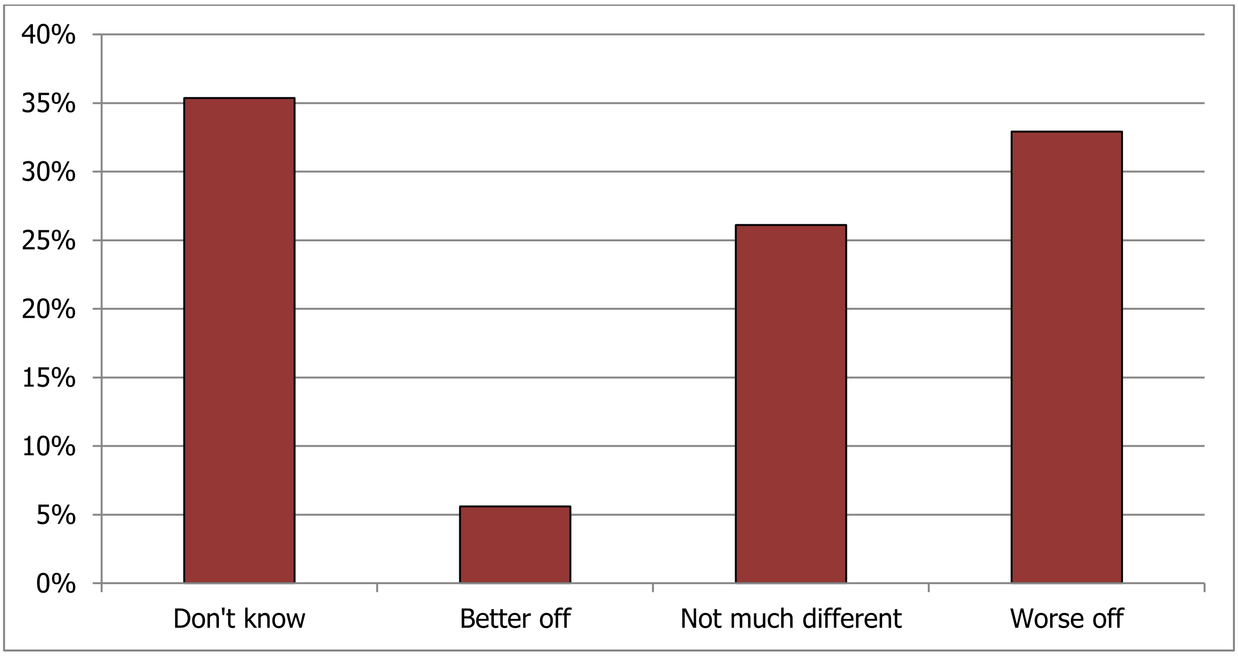
Social and Political Attitudes

SA17 respondents were asked a series of questions exploring a wide range of social and political issues on the Isle of Man. Numerous items were carried over from the previous year's survey, some were new to 2017, and a few were drawn from the 2002 Isle of Man Quality of Life Survey for a fifteen-year comparison.

Brexit, population, and immigration

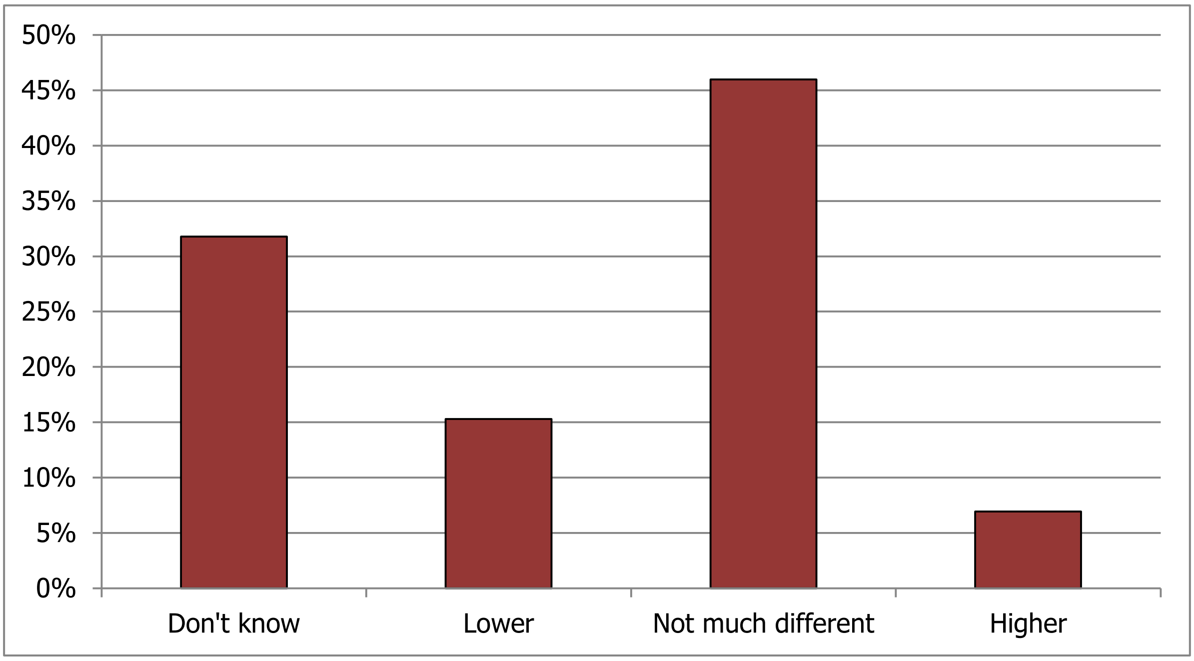
When asked about the impact of Brexit on the Island's economy, more than one in three respondents (35%) don't know what the impact will be. Another third of respondents feel that the economy will be worse off. One in four feel that the impact will not leave the economy much different, and a slim minority (6%) feel the Island will be economically better off.

Fig. 68: *"When Britain leaves the EU, the Isle of Man's economy will be…"*



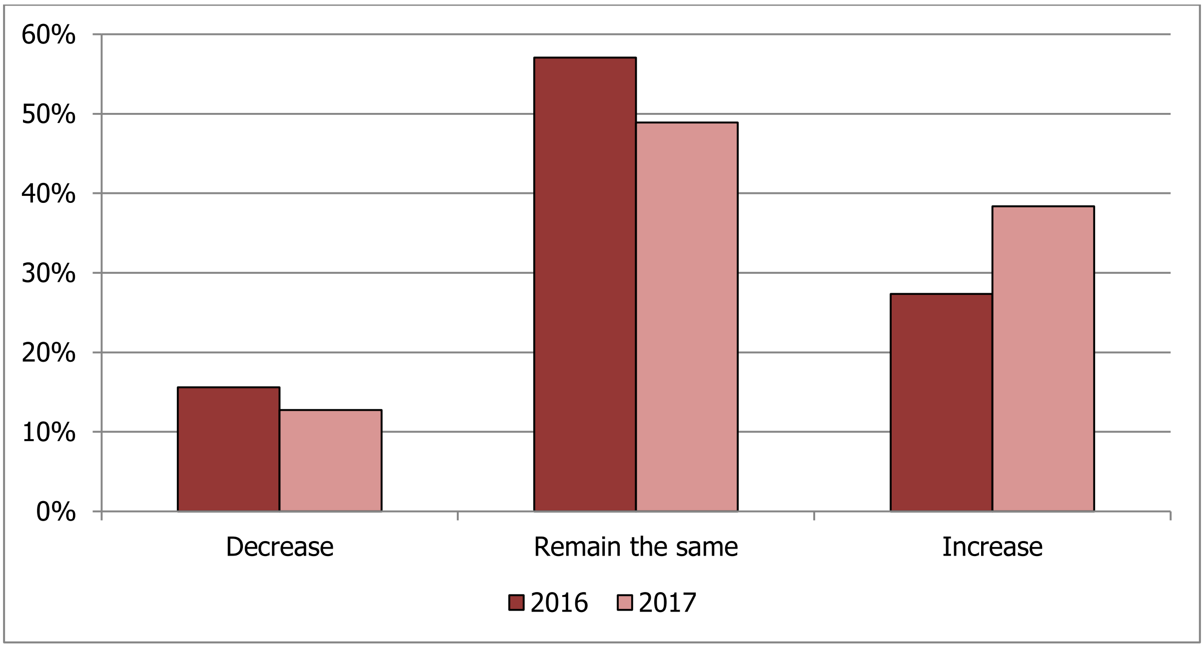
In general, SA17 respondents do not perceive a strong connection between economic change and migration flows. As with the previous question, one in three 'don't know' what impact Brexit might have on immigration to the Island, but the proportion of respondents who feel Brexit will not have much impact rises from 26% in the case of the economy to 46% in the case of immigration.

Fig. 69: *"When Britain leaves the EU, immigration to the Isle of Man will be…"*



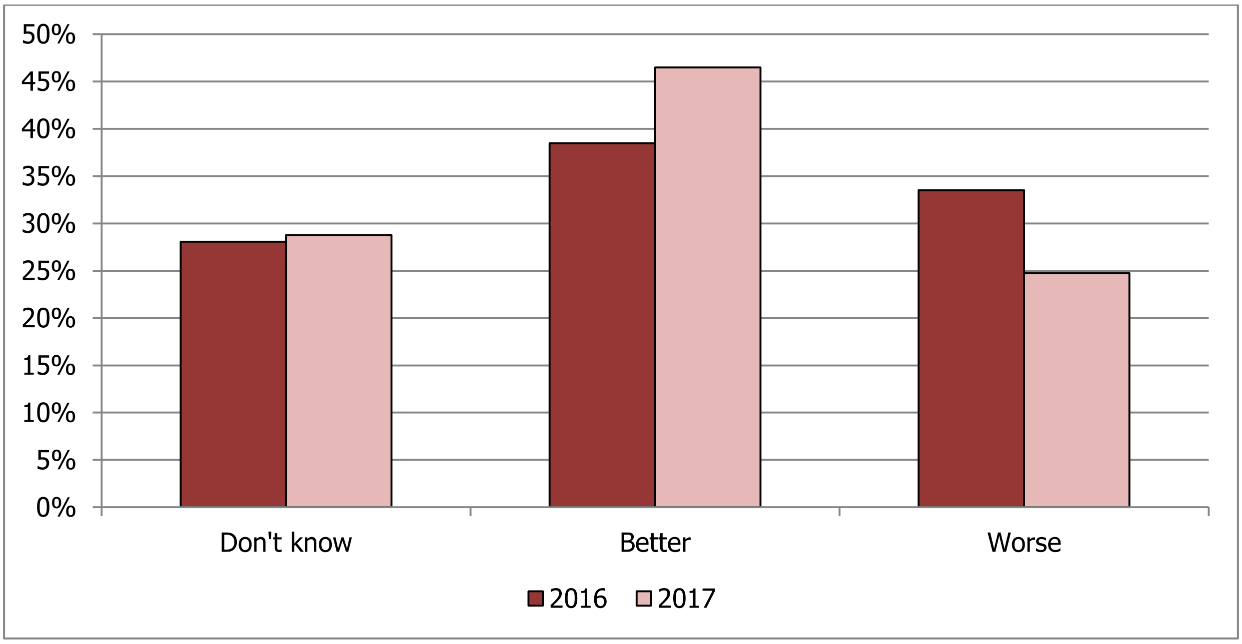
However, respondents are more likely to take a positive view of potential population increase in comparison to one year ago. While the proportion of respondents who feel that the Island's population should decrease has not changed substantially, those who feel that the population should remain static has dropped by 8% and those who feel it should increase has risen by 11%.

Fig. 70: *"Do you believe the Isle of Man's population should …"*



When asked about the impact that immigration to the Isle of Man has on quality of life on the island, respondents are 8% more likely than one year ago to indicate that immigration makes the quality of island life better. The proportion of respondents who feel that immigration worsens the quality of life has dropped by a corresponding amount.

Fig. 71: *"Do you believe that immigration into the Isle of Man makes the quality of life here…"*



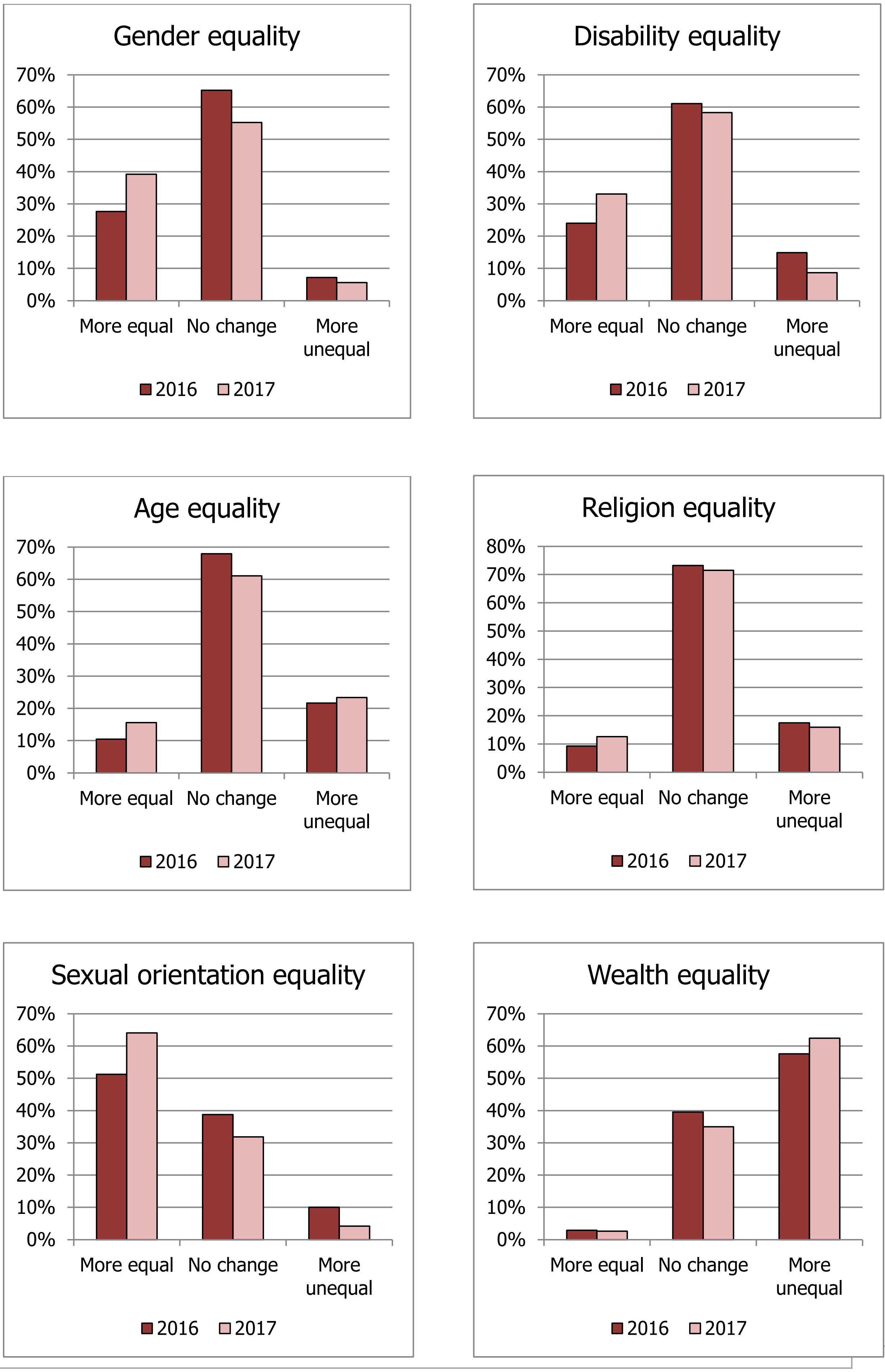
Social Equality

In line with the Government's commitment to an inclusive and caring society, the Social Attitudes Survey monitors public opinion on six domains of social equality, asking respondents whether the Isle of Man has become more or less equal over the past 5 years in terms of gender, disability, age, religion, sexual orientation, and wealth.

Sexual orientation equality is perceived by the majority of respondents (64%) to have shown the largest gains, compared to 51% in 2016. Perceived gender equality has increased by 11% from one year ago, disability equality has improved by 9%, and equality of religion and age have both improved by small margins (3% and 5%, respectively).

The sole exception to this general rising trend is the perception of wealth equality. More than half of respondents (58%) in 2016 indicated the opinion that wealth inequality has increased over the past five years, and in 2017 this proportion rose slightly, to 62%.

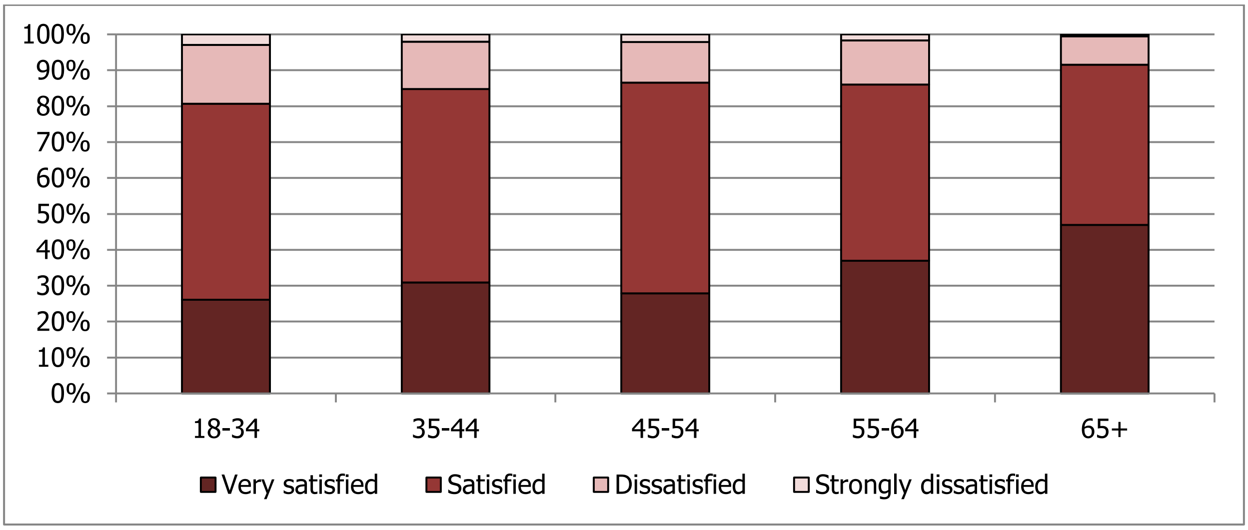
Fig. 72: *Dimensions of social equality, 2016/17*



Life Satisfaction and Happiness

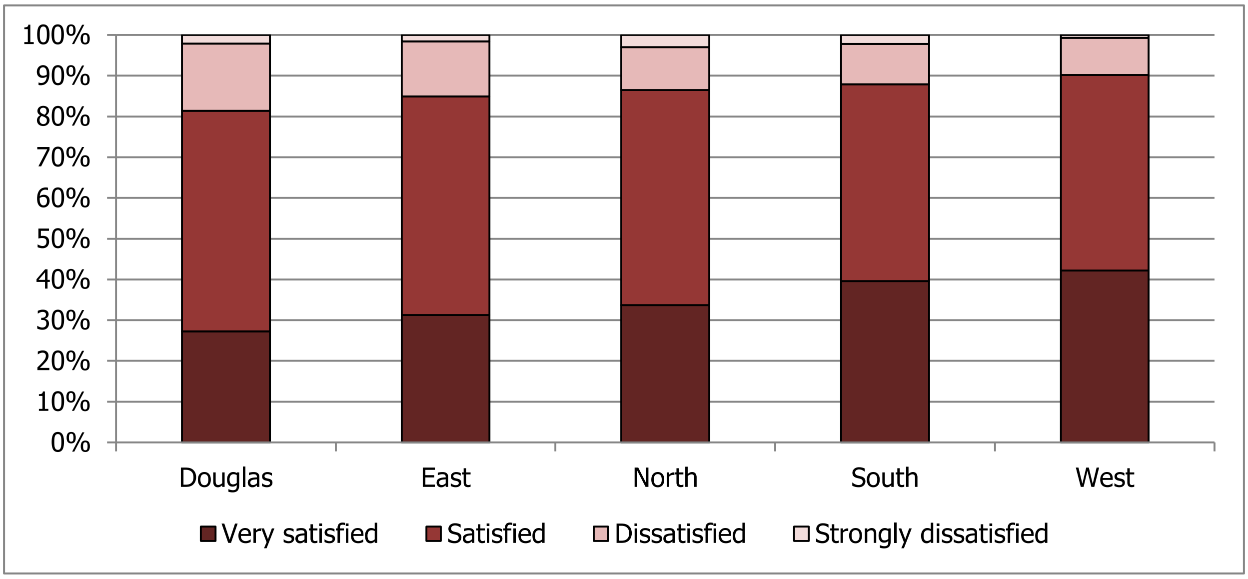
The great majority (86%) of SA17 respondents are 'satisfied' or 'very satisfied' with the Isle of Man as a place to live. Satisfaction with the Isle of Man as a place to live is related to age, income, and area of residence. Although the categorical differences are relatively small, satisfaction with the Isle of Man is higher for older respondents than for younger respondents, and rises steadily with age. At the same time, 79% of respondents indicate that they would recommend the Isle of Man to others as a place to live, and this opinion is equally prevalent for all age groups.

Fig. 73: *Satisfaction with the Isle of Man as a place to live, by age group*



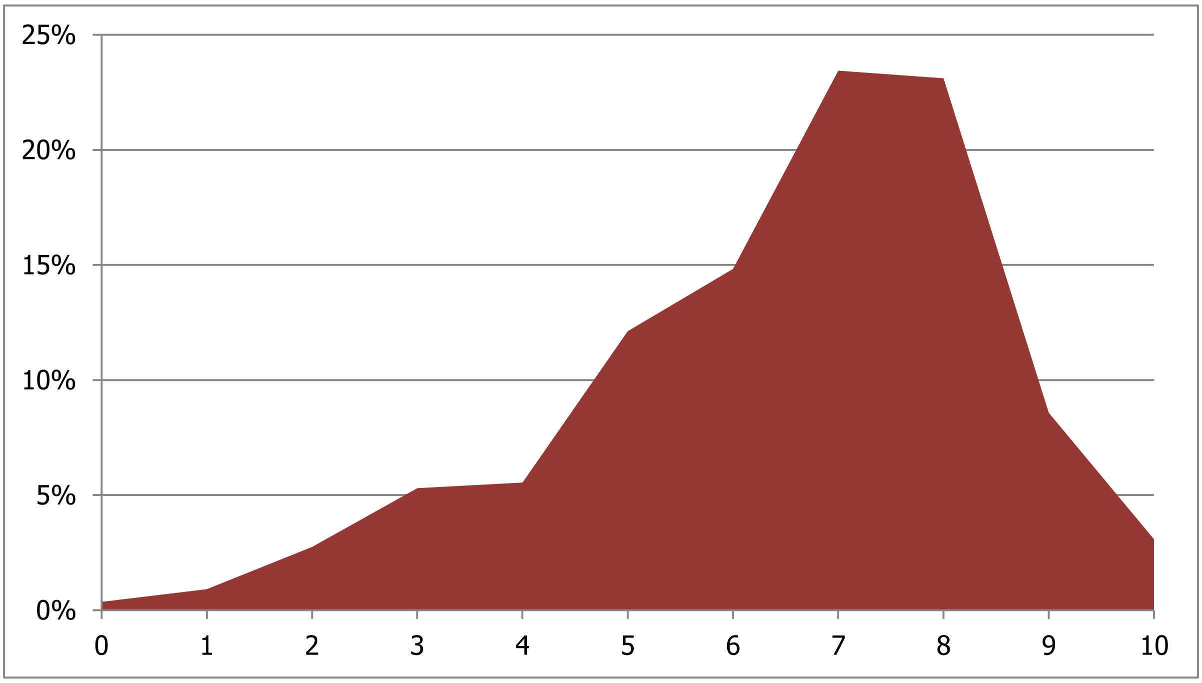
The respondents who are least satisfied with the Isle of Man as a place to live reside in Douglas (81% 'satisfied' or 'very satisfied'), and those most satisfied are located in the South and West (88% and 90% 'satisfied' or 'very satisfied', respectively).

Fig. 74: *Satisfaction with the Isle of Man as a place to live, by area*



The SA17 survey included a question borrowed from the World Happiness Study, asking respondents to place themselves on a scale of zero to ten, where zero represented the worst possible life for them and ten represented the best possible life. The average score on the Island is 6.43/10, slightly lower than the UK average score of 6.7 (2015-2016). A score of 6.43 would rank the Isle of Man at approximately #34 out of the 155 countries worldwide who participate in the World Happiness Study. The happiest country is Norway, with a score of 7.54, and the least happy country is the Central African Republic with a score of 2.69.

Fig. 75: *Happiness score (out of 10), World Happiness Index*



SA17 respondents were asked to describe what they feel are the best and worst things about living on the Isle of Man. No coded categories were presented to respondents, and all answers were collected as open-text data. These questions were also asked in the Quality of Life Surveys in both 1991 and 2002, providing us with a public opinion trend that encompasses 26 years.

What the results tell us is that the perceived benefits of living on the Isle of Man have not altered significantly in public opinion since 1991, and that the perceived drawbacks have not changed at all. The benefits or 'best things' have included the countryside or the natural environment, as well as a sense of personal safety (with frequent specific references to the safety of children), since 1991. Personal safety has risen in 2017 to the most frequent response, and for the first time, the notion of the Isle of Man's culture and sense of community has entered into the top three responses.

Table 3: *Best thing(s) about living on the Isle of Man, 1991-2017*

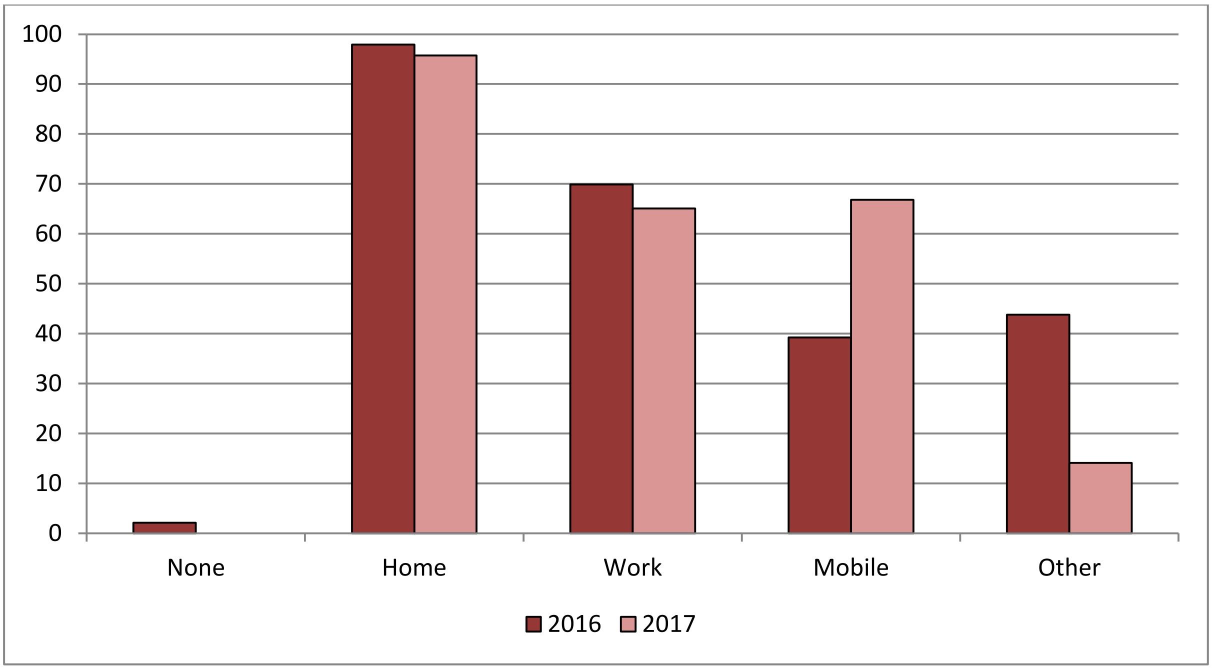
Survey	Quality of Life Survey 1991	Quality of Life Survey 2002	Social Attitudes Survey 2017
#1 response	Peace and quiet	Beautiful countryside	Safe environment/low crime
#2 response	Quality of the countryside	Good for bringing up children	Clean natural environment
#3 response	Safety/ low crime	Safe environment	Island culture/community

The perceived 'worst things' about life on the Isle of Man have seen no change in the top two most frequent responses since 1991: the cost of travel off-island is the top answer, and the high cost of living is the second. 2002 saw 'drugs and alcohol abuse' overtake 'lack of entertainment options for third place, but in 'lack of entertainment options' trailed by only 2% in that year.

Table 4: *Worst thing(s) about living on the Isle of Man, 1991-2017*

Survey	Quality of Life Survey 1991	Quality of Life Survey 2002	Social Attitudes Survey 2017
#1 response	Cost of travel off-island	High cost of travelling off-Island	Cost/inconvenience of travel off-Island
#2 response	High cost of living	High cost of living (housing, or in general)	High cost of living (housing, utilities, or in general)
#3 response	Lack of shopping/ leisure options	Drugs and alcohol abuse	Lack of entertainment/ leisure options

Fig. 76: *Proportionate internet access, 2016/17*



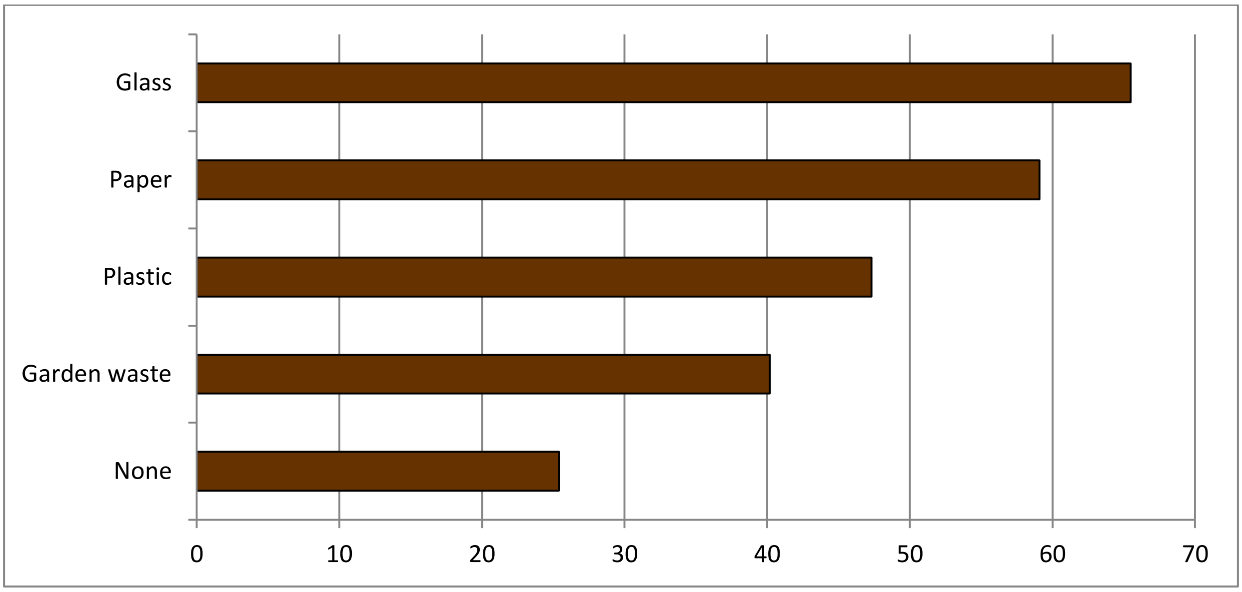
Respondents were asked about their ability to access the internet at home, at work, on mobile access, or by any other means. Respondents selected all modes of access that applied to them, and consequently the proportions of all responses add up to more than 100%.

100% of SA17 respondents indicate that they have internet access by some means. The frequency of mobile access has increased by 28% since the 2016 Social Attitudes Survey.

Waste and Recycling

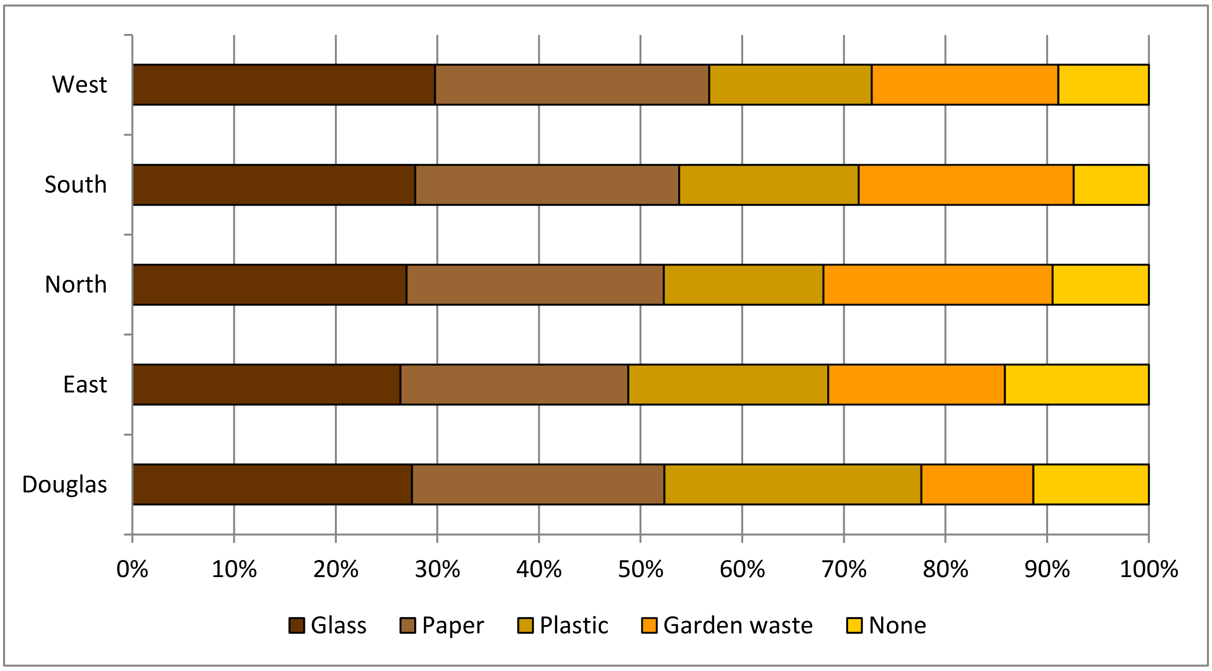
Three-quarters (75%) of all respondents indicate that their household recycles one or more of plastic, paper, glass, and/or garden waste. The most commonly recycled item is glass (66% of households), followed by paper, plastic, and garden waste.

Fig. 77: *Household recycled materials*



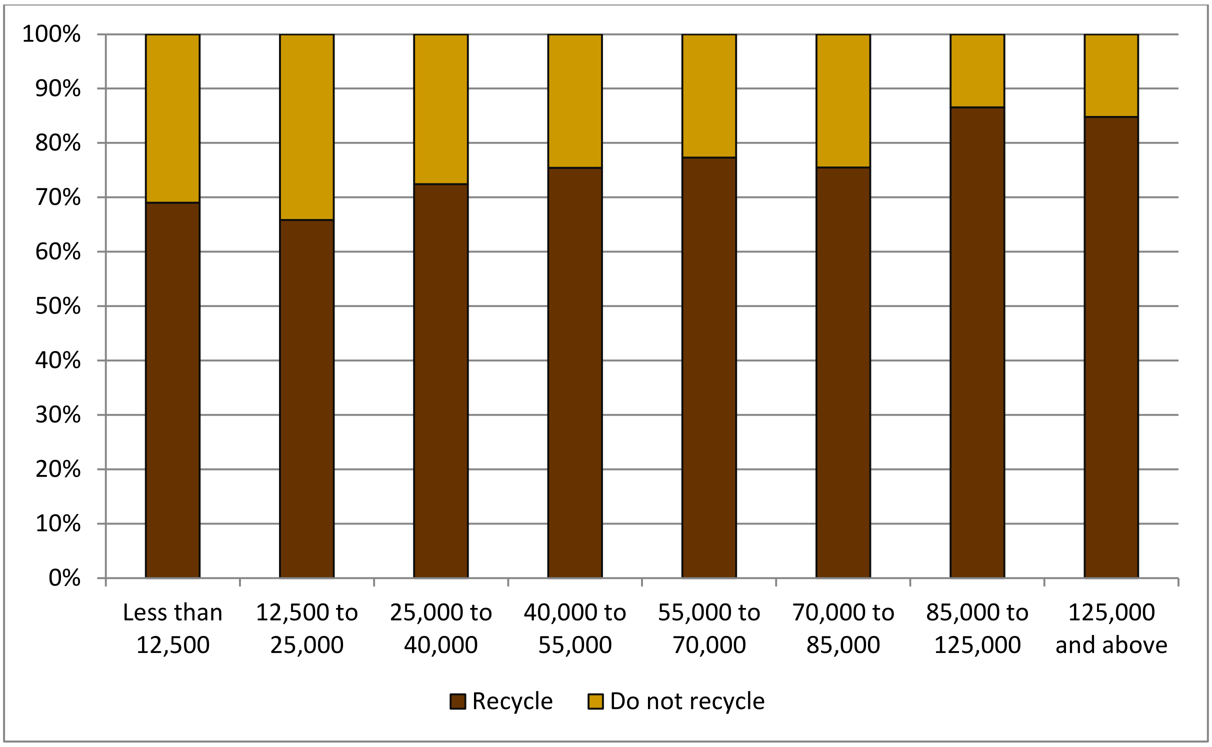
Self-reported recycling behaviours do not greatly vary across the Island. Douglas residents are the least likely to recycle garden waste, which likely arises from the proportion of people living in apartments or flats. Conversely, Douglas residents are the most likely to recycle plastic.

Fig. 78: *Household recycled materials, by area*



There is a statistically significant correlation between recycling behaviour and gross household income. One in three households (33%) with annual income less than £25,000 do not recycle, while at the highest levels of income (£85,000+) the proportion of non-recycling households drops below one in six (14%).

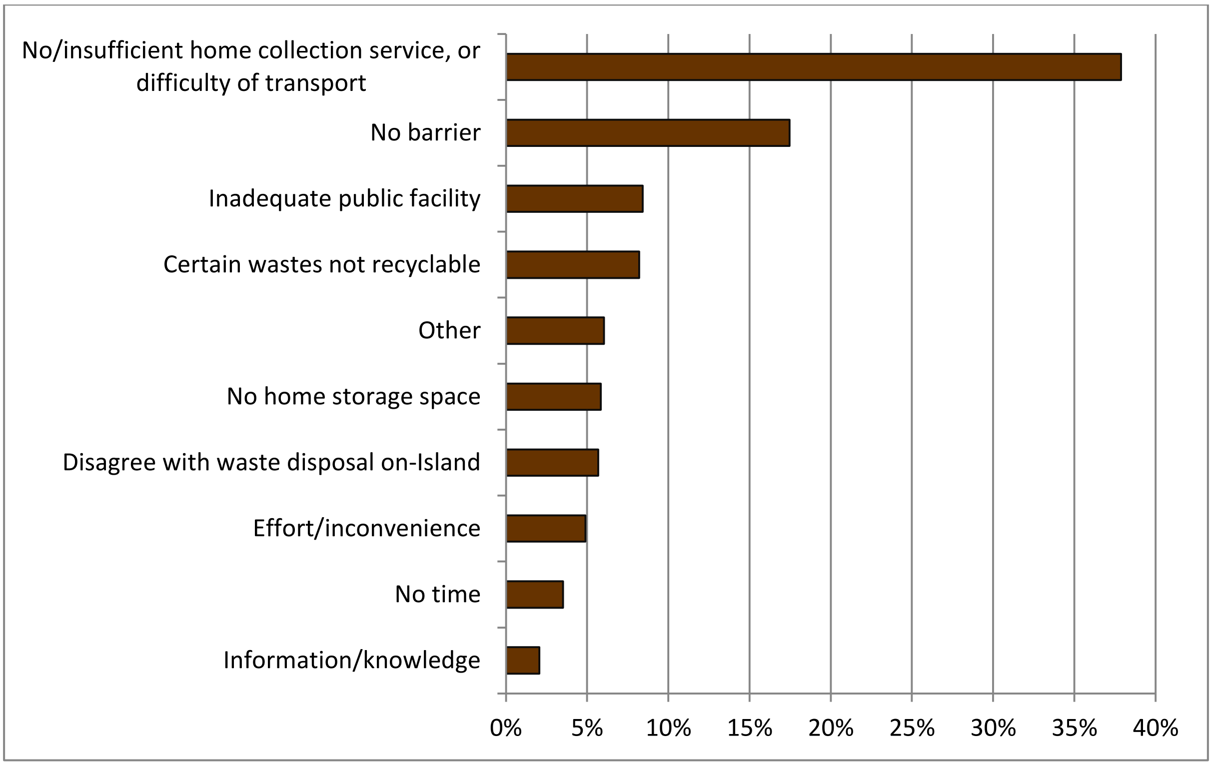
Fig. 79: *Household recycling, by gross annual household income*



All SA17 respondents were asked about what was the biggest barrier to household recycling. The most frequent response by a wide margin refers to one or both of "difficulty of transport to recycling facility" or "no kerbside collection service" – these two ideas are very closely linked in respondents' open-text comments, and were often referenced simultaneously.

The next most frequent comment is that there is no barrier; 17% of respondents feel that recycling is or would be easy. Those respondents who do not recycle because they disagree with waste disposal on the island commonly indicate the perception that recycled materials are incinerated as fuel in the Richmond Hill energy-from-waste facility.

Fig. 80: *Barriers to recycling*



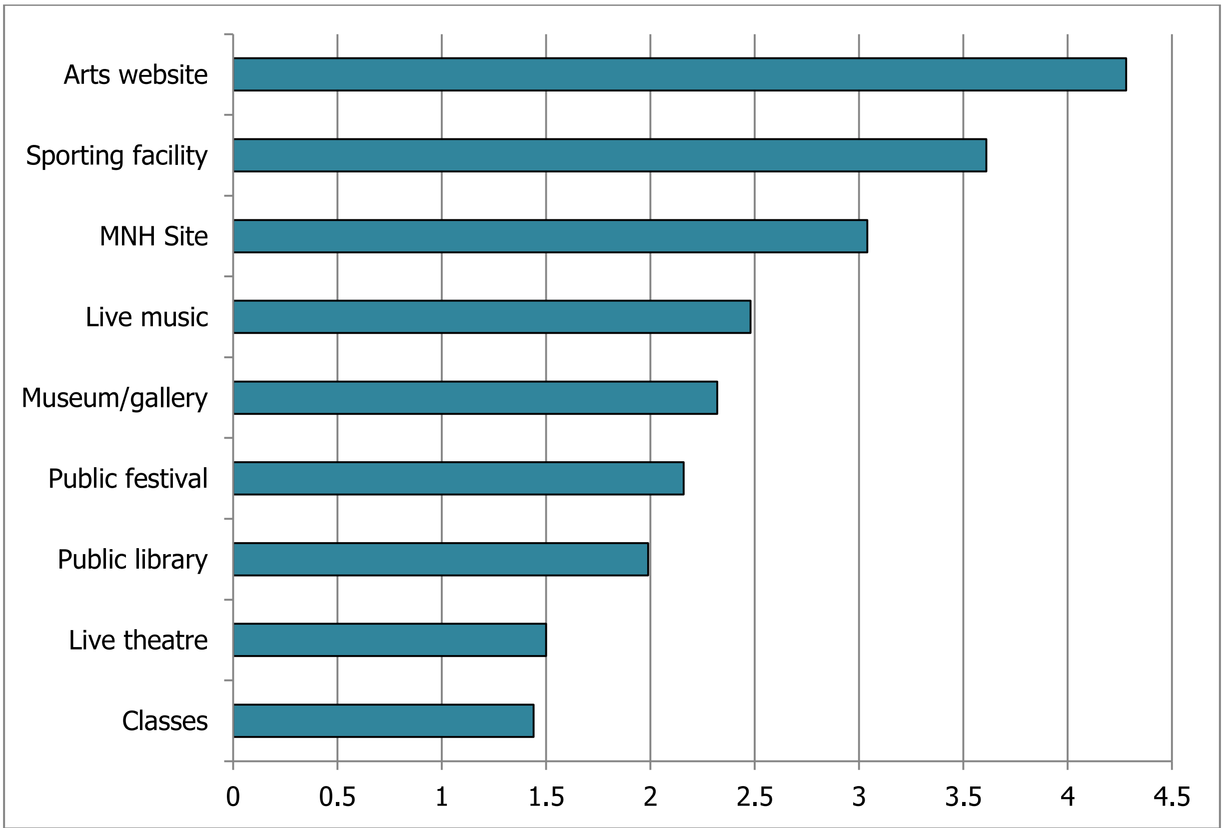
Recreation and Leisure

SA17 respondents were asked about their arts and cultural activities, their club membership, and their recreational activities in outdoor sites around the Island. In the 2016 Social Attitudes Survey a limited range of these questions were asked with compressed categories, but this section was expanded for SA17.

Respondents were asked approximately how many times in the past year they visited an arts or cultural site on the island, attended a variety of types of live performance, or undertook other arts and culture activities such as classes or lectures, use of sporting facilities, or visits to local arts and culture websites.

On average, arts and cultural websites are the most frequently used (mean response 4.3 website visits per year). The next most frequent activity is the use of Government sporting facilities including the NSC, regional swimming pools or sports pitches, followed by the Manx National Heritage sites. The least frequent activities are attendance at live theatre performances and attendance at classes and lectures, although frequency of attendance in these cases may be affected by availability.

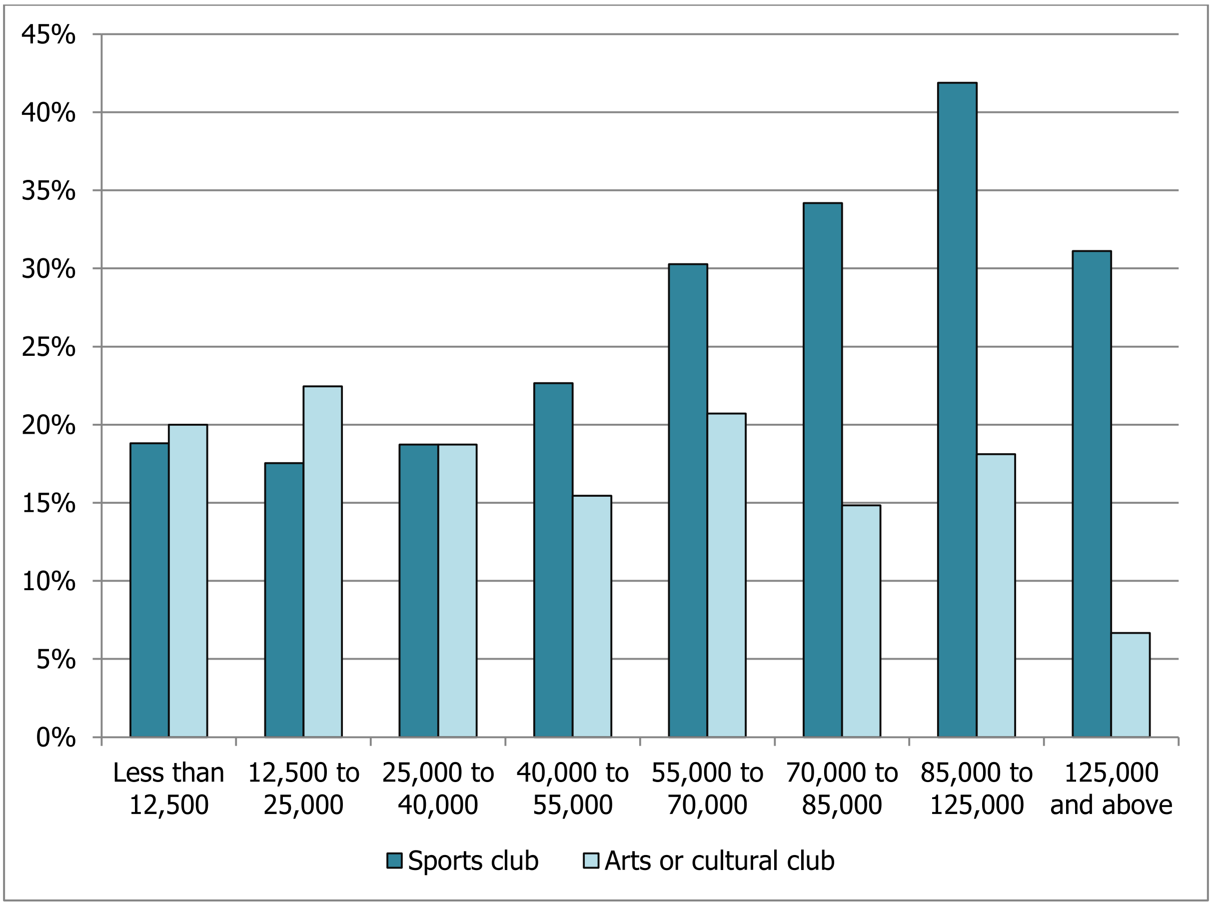
Fig. 81: *"In the past 12 months on the Isle of Man, how many times have you visited/attended …"*



18% of respondents belong to an arts and cultural club on the Island, and 24% belong to a sporting club. 4% belong to both types of club.

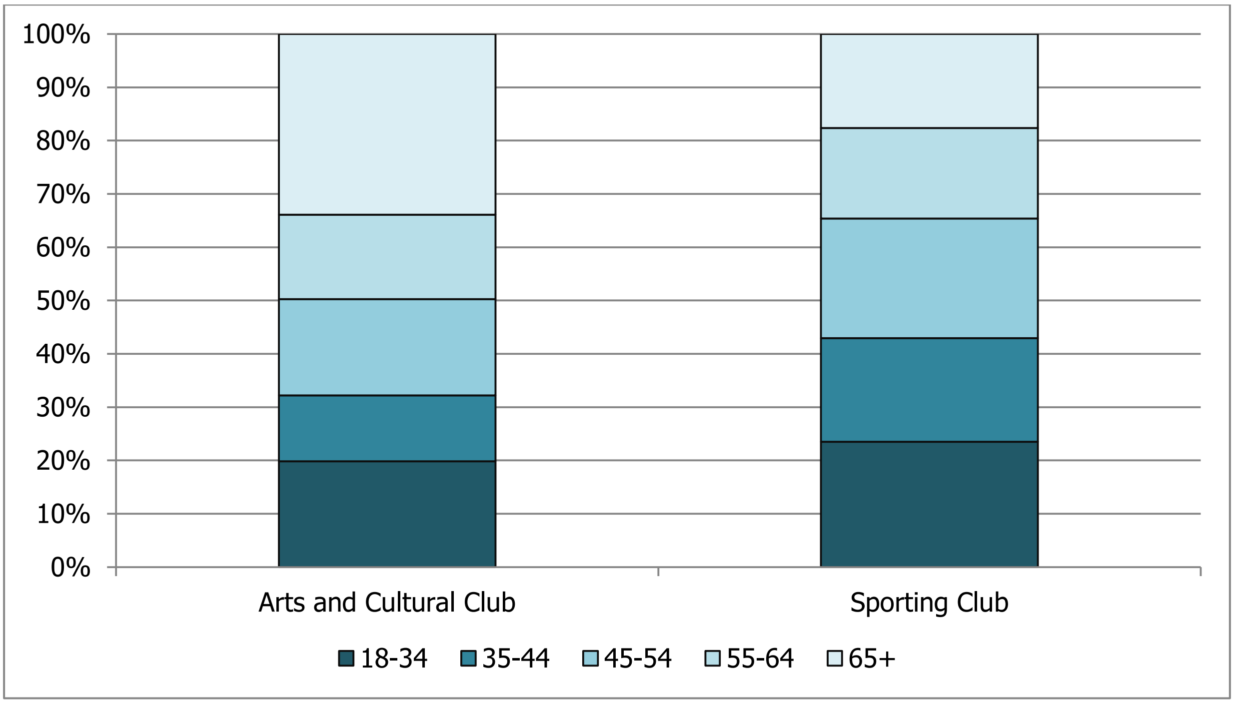
Type of club membership is significantly determined by annual household income. For respondents below the median annual income category of £40,000-£55,000, arts clubs are slightly more prevalent than sporting clubs. As income rises beyond the median category, the disparity between types of club membership widens considerably, indicating the possibility that sporting club membership is associated with expenses that could be prohibitive to lower income segments of society.

Fig. 82: *Sports or Arts/Cultural club membership, by gross annual household income*



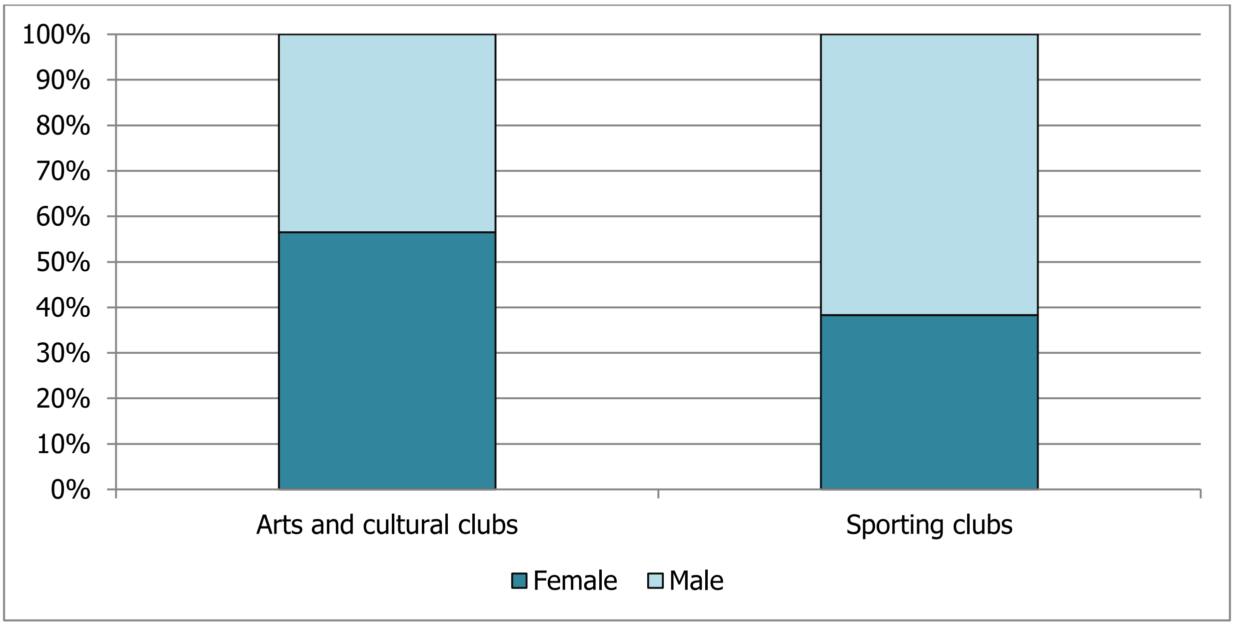
Additionally, there are significant age differences in club-based leisure pursuits, as sporting club members tend to be younger, while arts and cultural clubs are predominantly comprised of older respondents.

Fig. 83: *Sports or Arts/Cultural club membership, by age group*



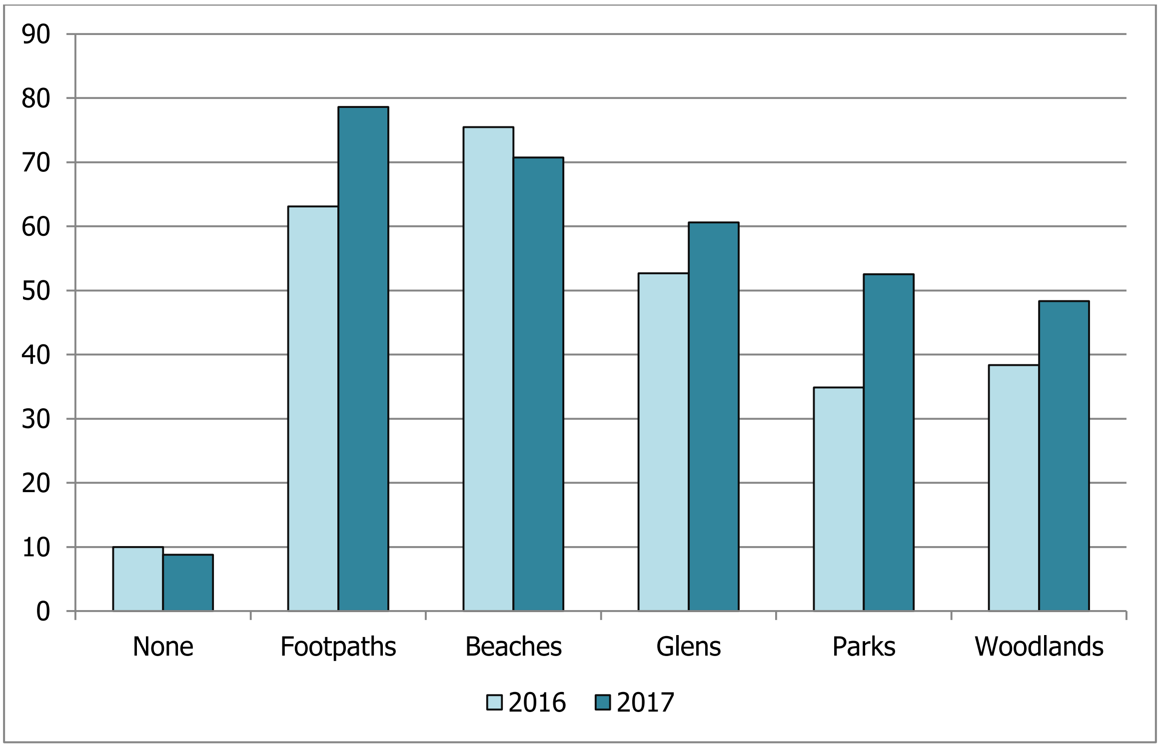
Moreover, gender parity in club membership is more imbalanced in sporting clubs (a 12% parity gap) than in arts and cultural clubs (6% parity gap).

Fig. 84: *Sports or Arts/Cultural club membership, by gender*



When asked about their use of natural environments on the Island, 79% of respondents report the use of footpaths, an increase of 16% from one year ago. SA17 respondents also indicate increased usage of glens, parks, and woodlands when compared to the results of the 2016 survey. Respondents were asked to describe all natural environments that they use at least monthly, and so responses across categories sum to more than 100%.

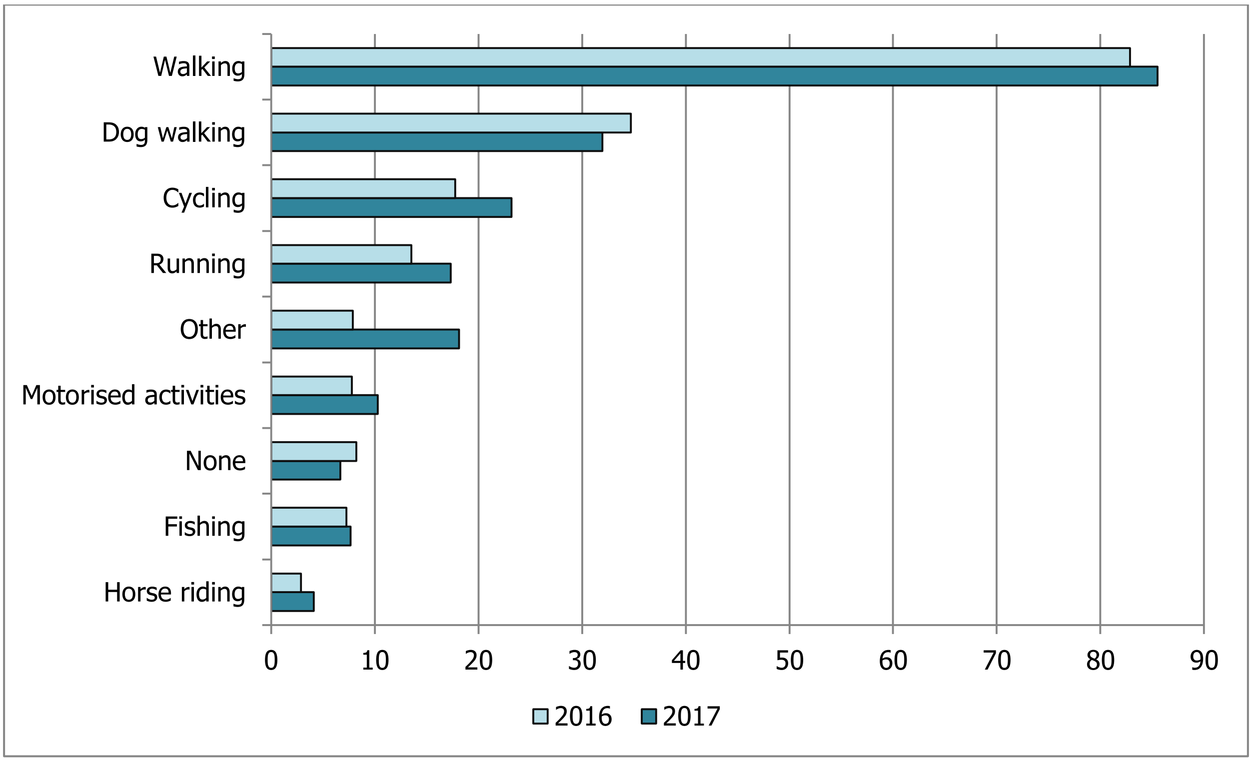
Fig. 85: *Use of natural outdoor environments, 2016/17*



Prevalent activities in outdoors environments have not significantly changed in the past year. Walking is still the most widespread activity by a margin 50% greater than the next most popular activity, dog walking. Cycling, running, and other activities have increased by small margins over the past twelve months.

One observation of interest is the proportionate doubling of 'other activities' from 8% in 2016 to 18% in 2017. Though respondents were not asked to specify what they meant by 'other activities', SA17 findings show that 'other' activities are most closely associated with beaches (84%) and footpaths (82%).

Fig. 86: *Outdoors activities, 2016/17*



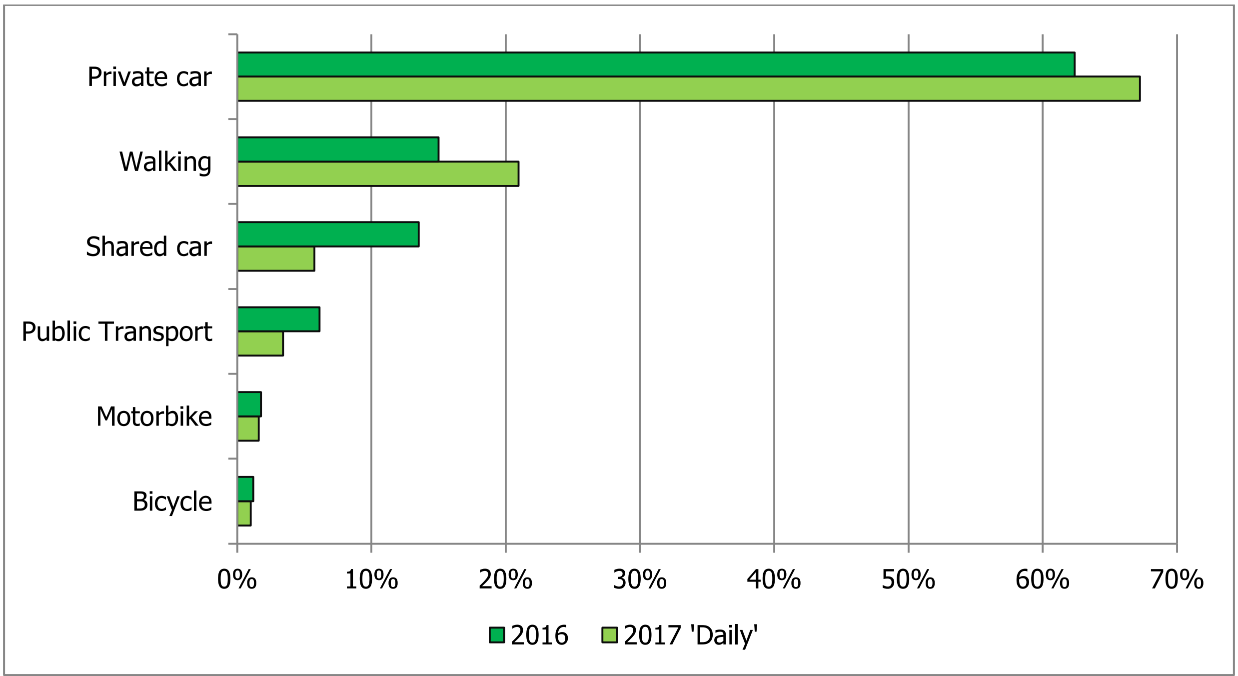
Transport and Travel

SA17 respondents were asked a range of questions about their mode of transport to work, perceived barriers to active transport, and opinions regarding Isle of Man air and sea transport links.

In the 2016 Social Attitudes survey, respondents were asked to describe their primary mode of transport to work. The 2017 version of the survey expanded on these questions to further probe the frequency of various modes of commuter transport.

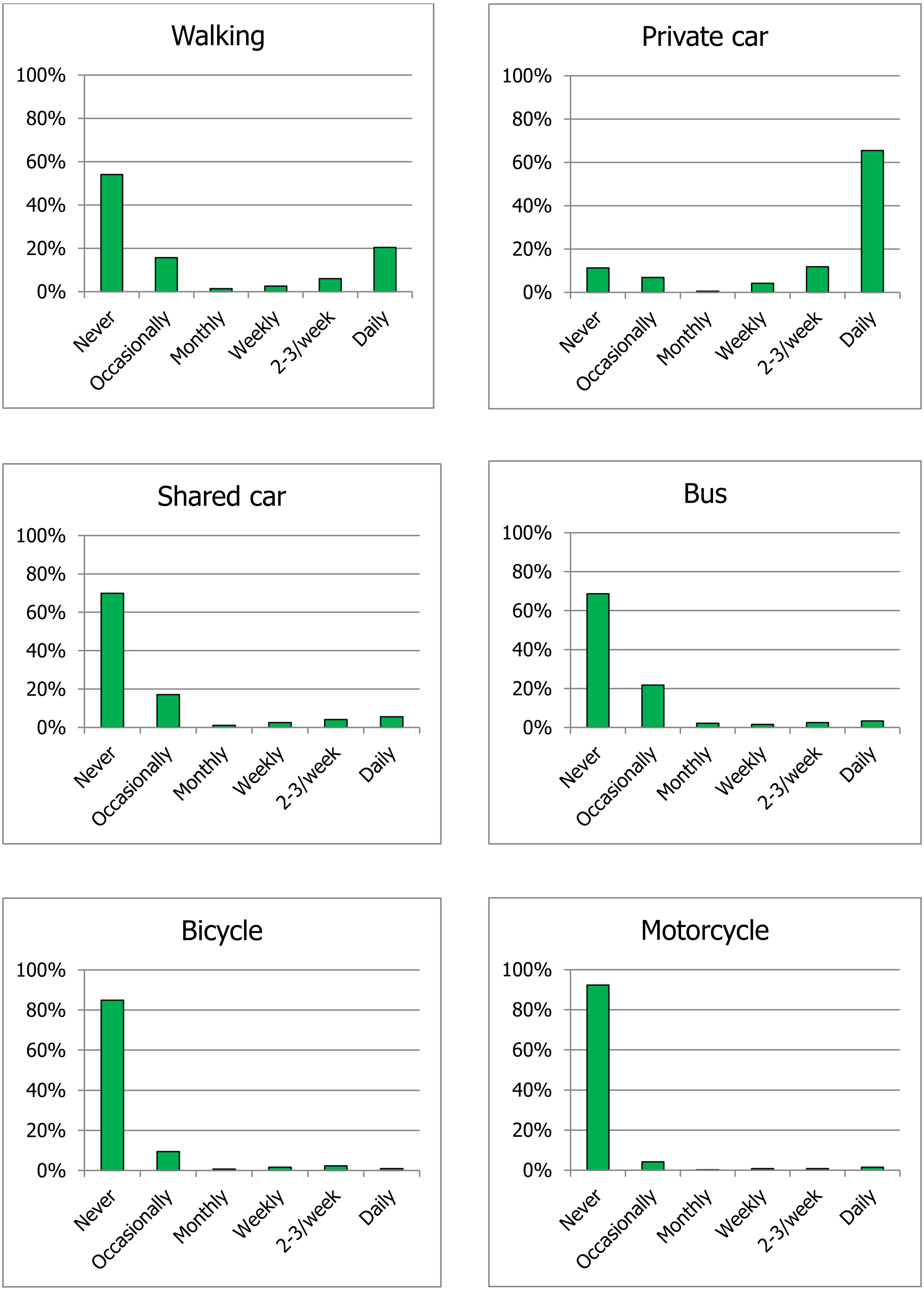
Summary comparisons between the two slightly different sets of questions are made by comparing 2016's primary mode of transport, to the mode of transport described in 2017 as 'Daily'. SA17 respondents are slightly but not significantly more likely to travel to work in a private car (+4% in 2017), and less likely to travel in a shared car. There has been a 6% reported increase in the proportion of respondents who walk to work, and a decline in the proportion who take public transport (6% in 2016 to 3% in 2017).

Fig. 87: *Transport to work, 2016/17*



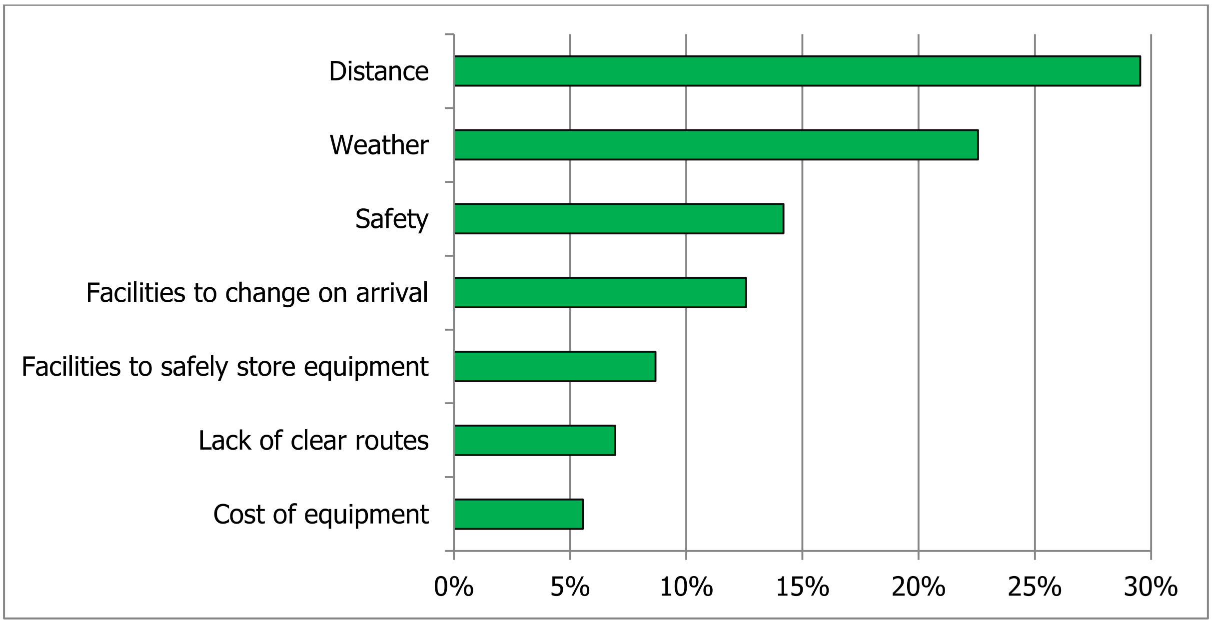
The most variable modes of transport are walking and use of a private car. While 54% of respondents never walk, one in six (16%) do walk occasionally, and one in five walk daily. Daily private car commutes account for 65%, but the remaining third of respondents show greater flexibility in their car commute. Bicycle transport to work is relatively infrequent, as 85% of employed respondents never cycle. 69% never use bus services, and only 7% take the bus once per week or more.

Fig. 88: *Frequency of active transport, by transport mode*



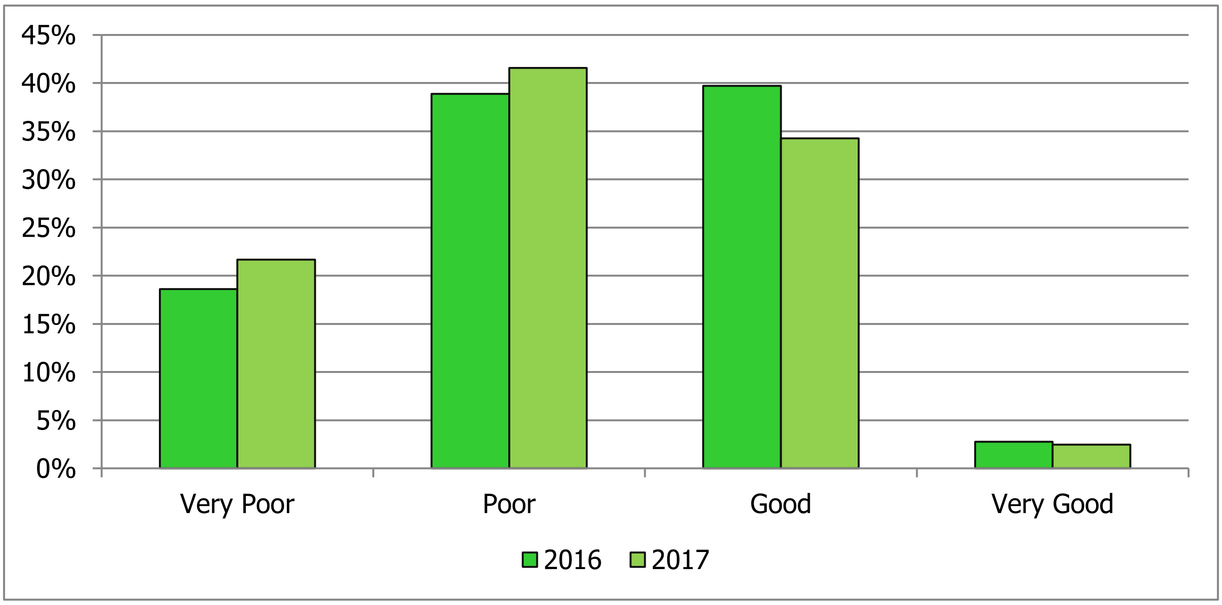
SA17 respondents who do not walk or cycle to work were asked what things prevent them from doing so. The most prevalent response is 'distance' (30%), followed by 'weather' (23%), both of which are objective conditions that have no obvious policy response. One in seven respondents indicate that safety is a barrier to active transport, and a similar proportion state that they lack facilities to change clothing upon arrival at work. The least frequent response is lack of clear routes (7%).

Fig. 89: *Barriers to active transport*



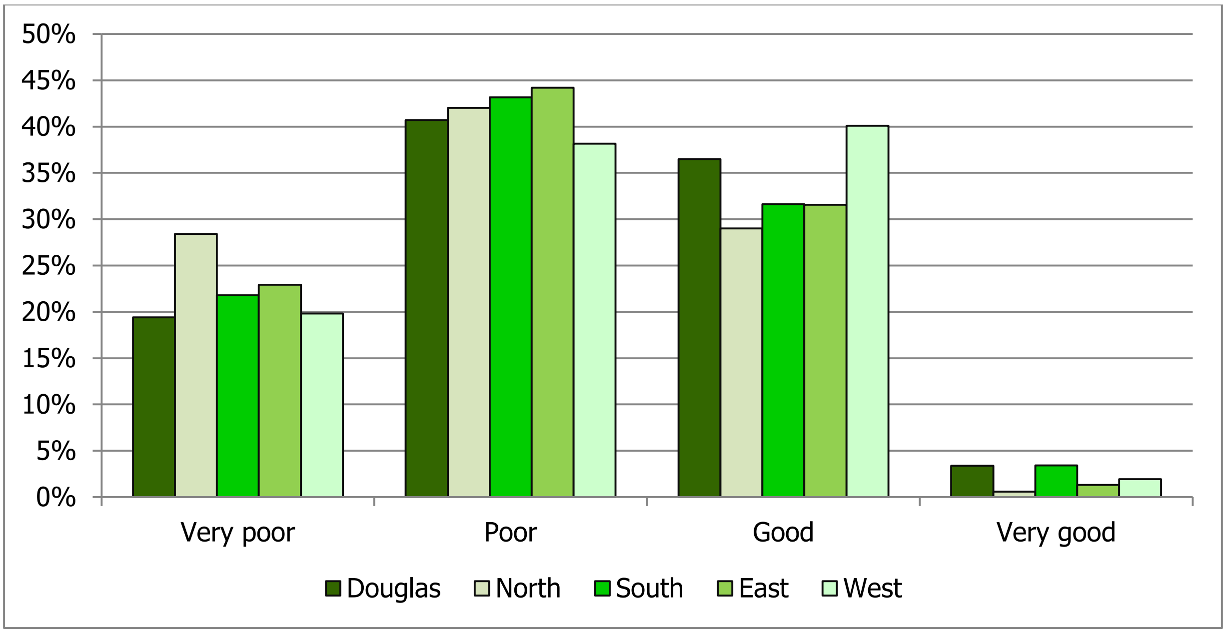
The majority of respondents (64%) are dissatisfied with the quality of roads on the Island, which is a slight increase in dissatisfaction (58%) from one year ago.

Fig. 90: *Satisfaction with road quality, 2016/17*



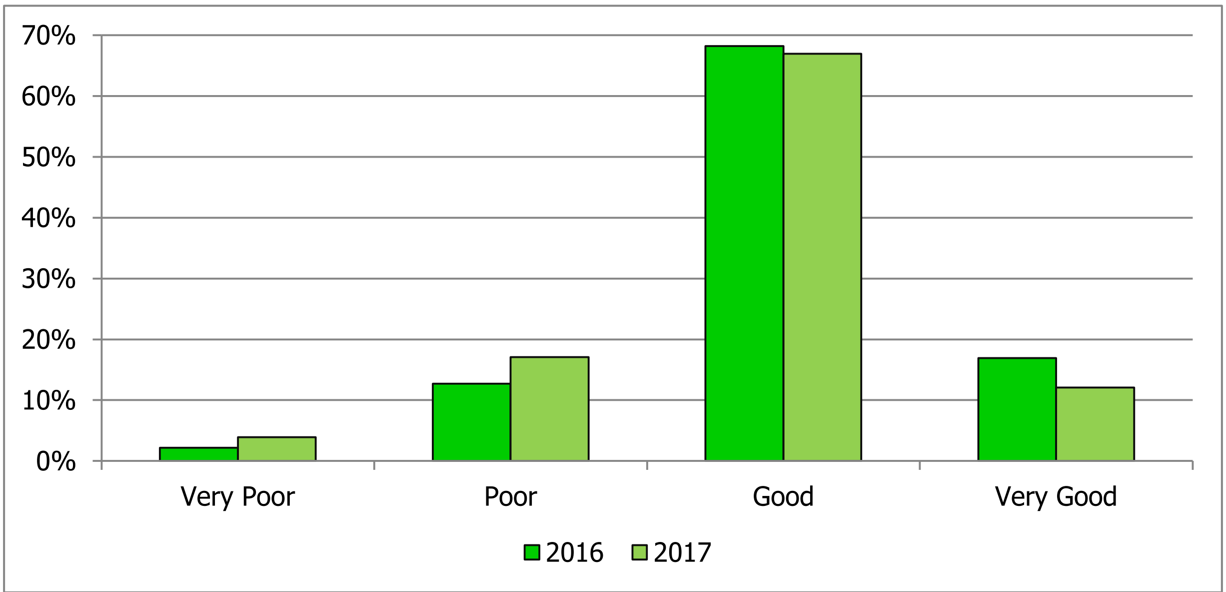
Satisfaction with road quality varies by region of residence. Respondents living in the North of the Island were most likely to rate the quality of roads as 'poor' or 'very poor' (70%), while residents of the West were somewhat more likely than average to rate the quality of roads as 'good' or 'very good' (42%, against an average of 37%).

Fig. 91: *Satisfaction with road quality, by area*



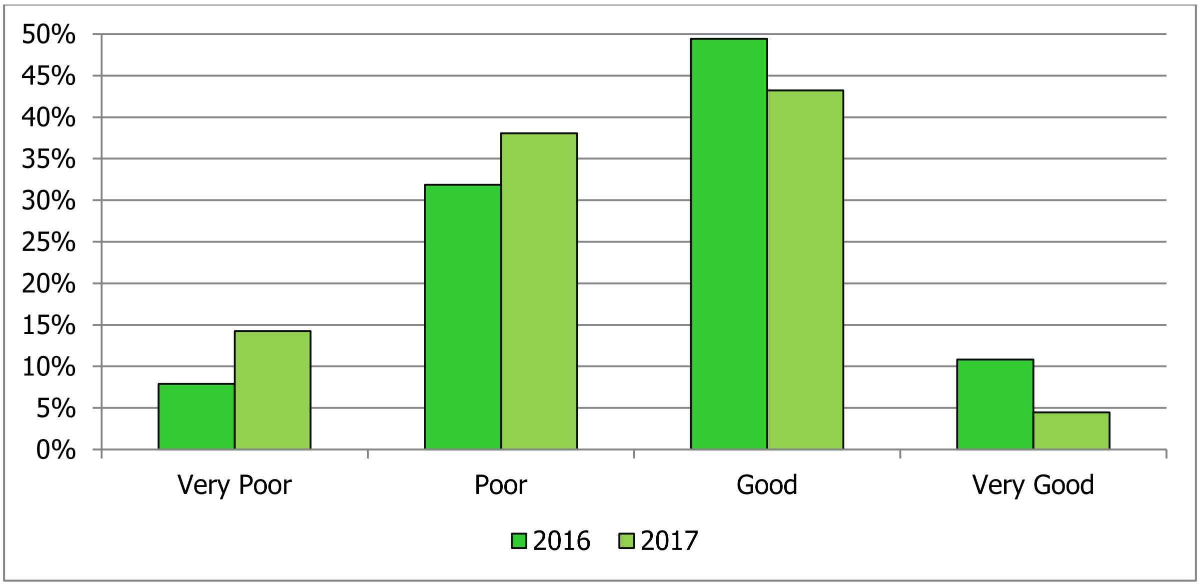
The great majority of respondents (79%) indicate the opinion that the safety of their journey into work is 'good' or 'very good'. This public opinion has declined slightly in the past year, from 85% in 2016, and bears no statistically significant correlation to area of residence or to age.

Fig. 92: *Satisfaction with safety of journey to work, 2016/17*



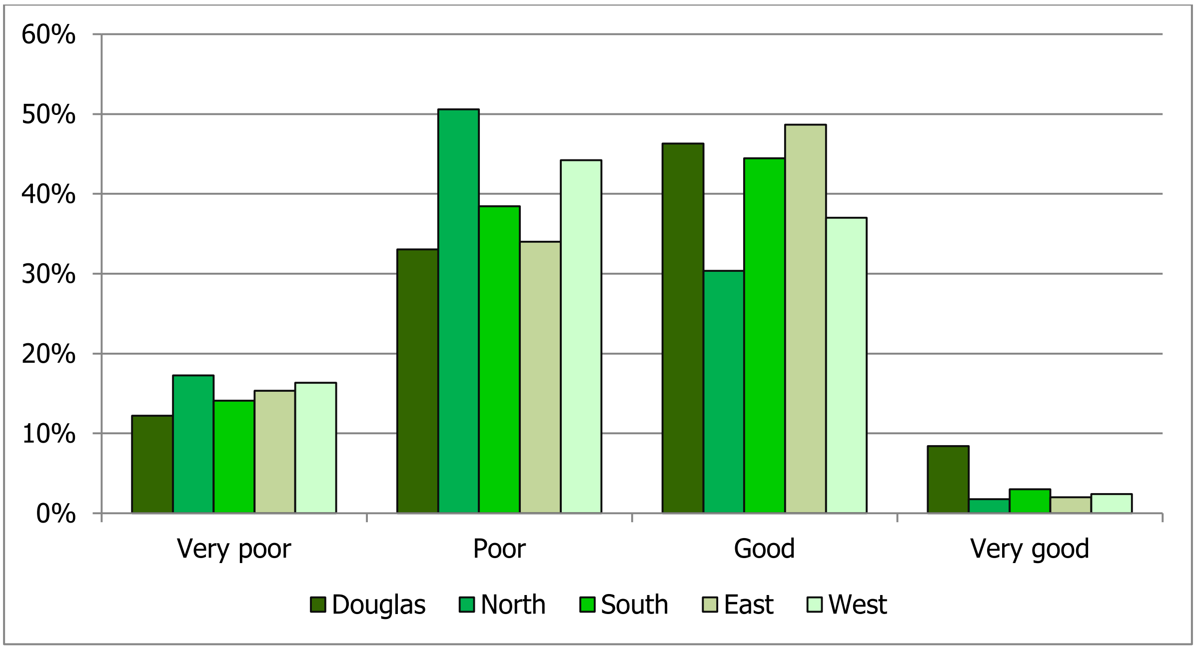
Nearly half of respondents (48%) rate the quality of pavements as 'good' or 'very good', which is a statistically significant decline from 2016, when the approval rating was 60%.

Fig. 93: *Satisfaction with pavement quality, 2016/17*



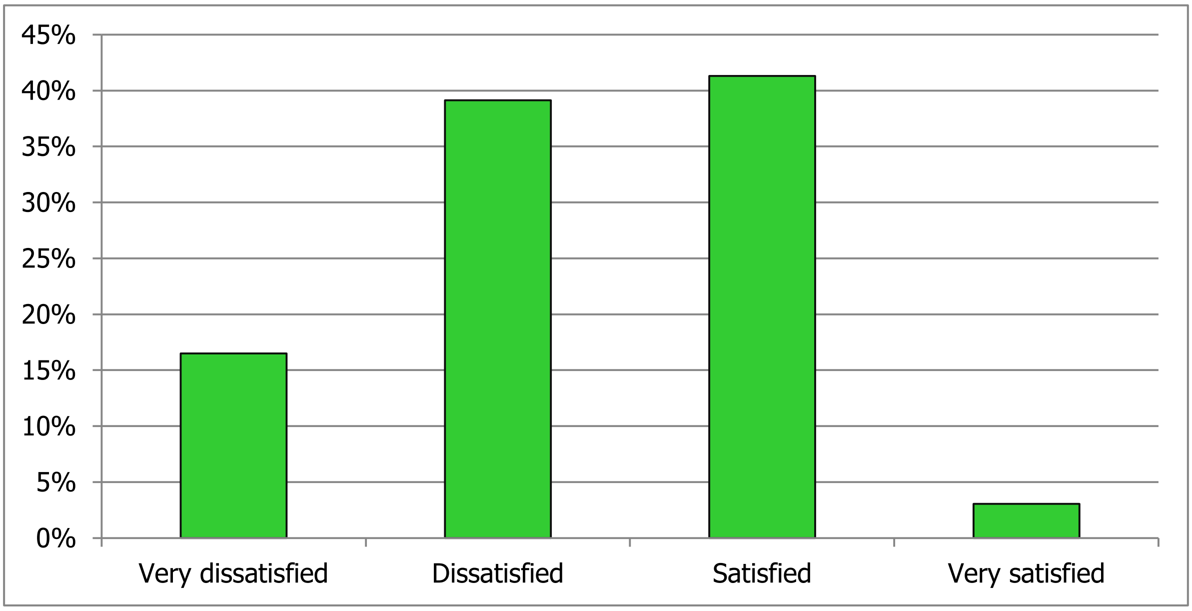
As with quality of roads, the issue of pavement quality has a distinct regional dimension. The highest levels of satisfaction with pavement quality are associated with residents of Douglas (54%), while the lowest satisfaction occurs in the North of the Island (32%).

Fig. 94: *Satisfaction with pavement quality, by area*



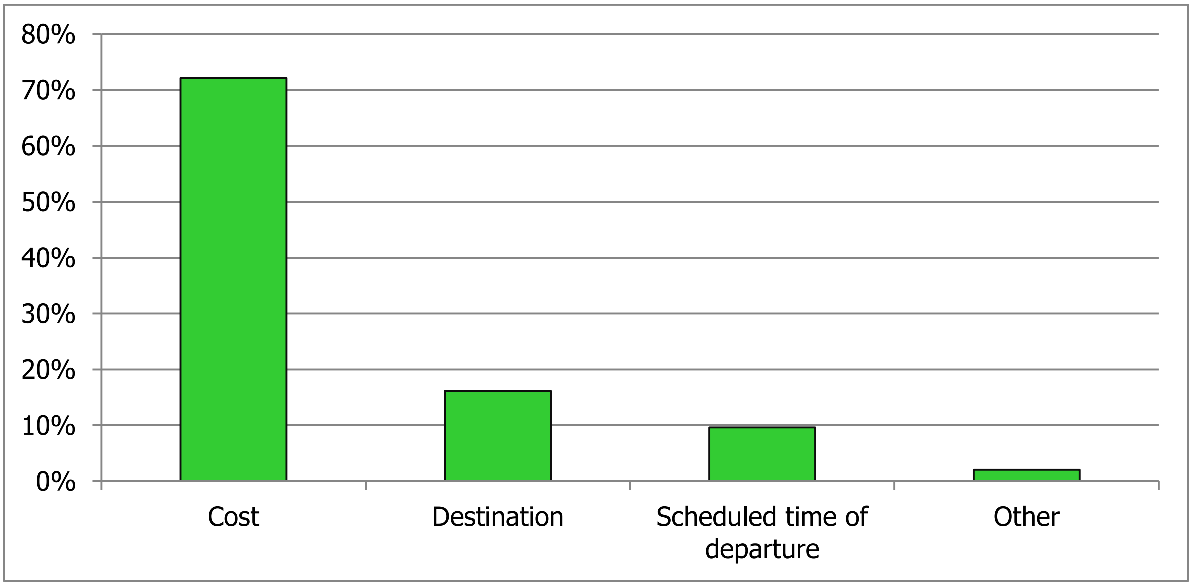
SA17 respondents were asked a series of questions about air and sea travel links on and off the Island. The majority of respondents (56%) indicate that they are 'dissatisfied' or 'very dissatisfied' with air and sea links.

Fig. 95: *Satisfaction with Isle of Man air and sea links*



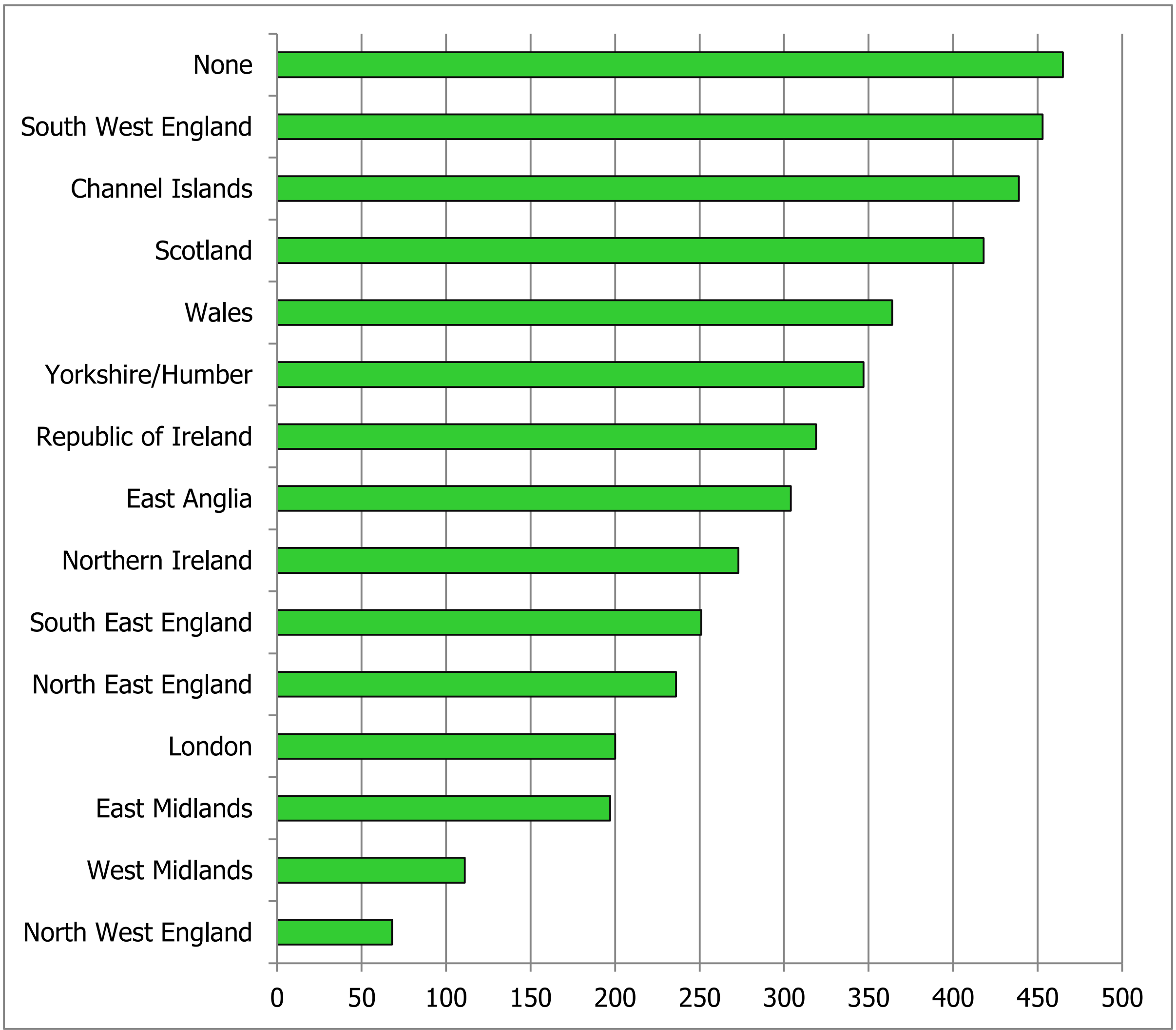
When asked "What is the most important factor when choosing to travel off the Island?", three out or four respondents (72%) indicate *Cost*.

Fig. 96: *Most important factor in choosing to travel off-Island*



SA17 asked respondents to indicate areas in the UK that they regarded as particularly difficult to access. While the most frequent response was 'None', the next three most frequent responses were South West England, the Channel Islands, and Scotland. (Flights to Glasgow were introduced at Ronaldsway Airport while the Social Attitudes 2017 survey was in process.)

Fig. 97: *Areas in the UK perceived as difficult to access*



SA17 respondents were also asked if there was a particular airport in the UK to which they would like an Isle of Man transport link. Slightly more than half of respondents (54%) answered the question, and over 50 different airports were suggested. The most frequently suggested airport was Heathrow (16%), followed by Southampton (7%).

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