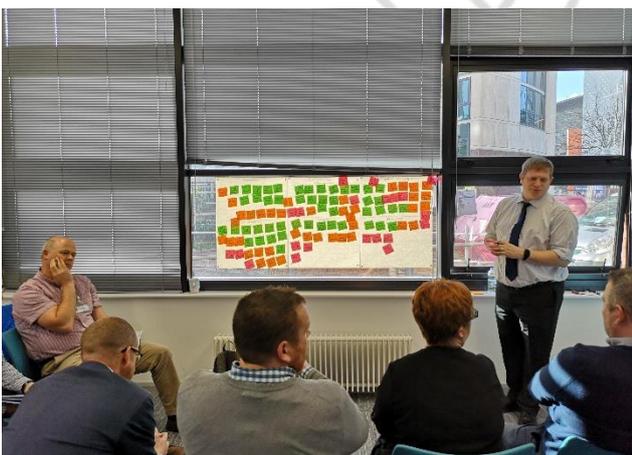


7. Rural Workshop Report – Mid & South West Wales

Llandeilo, 30 November 2018

January 2019



Llywodraeth Cymru
Welsh Government

ARUP

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Appendix A

Mid & South West Wales Rural Workshop Presentation

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Mid & South West Wales Rural – Event Register

1 Introduction

1.1 Study Context

Following the consultation on the National Development Framework (NDF) Preferred Option in the summer of 2018, the Welsh Government will commence preparation of the Draft NDF in the winter of 2018/9. Consultation on the Draft NDF is planned for July 2019.

As set out in the Preferred Option, it is proposed the NDF will include both national and regional policies across the defined regions. The three regions will cover North, Mid and South West and South East Wales. These regions reflect the regions identified by the Welsh Government's Economic Action Plan and can be seen in Figure 1.

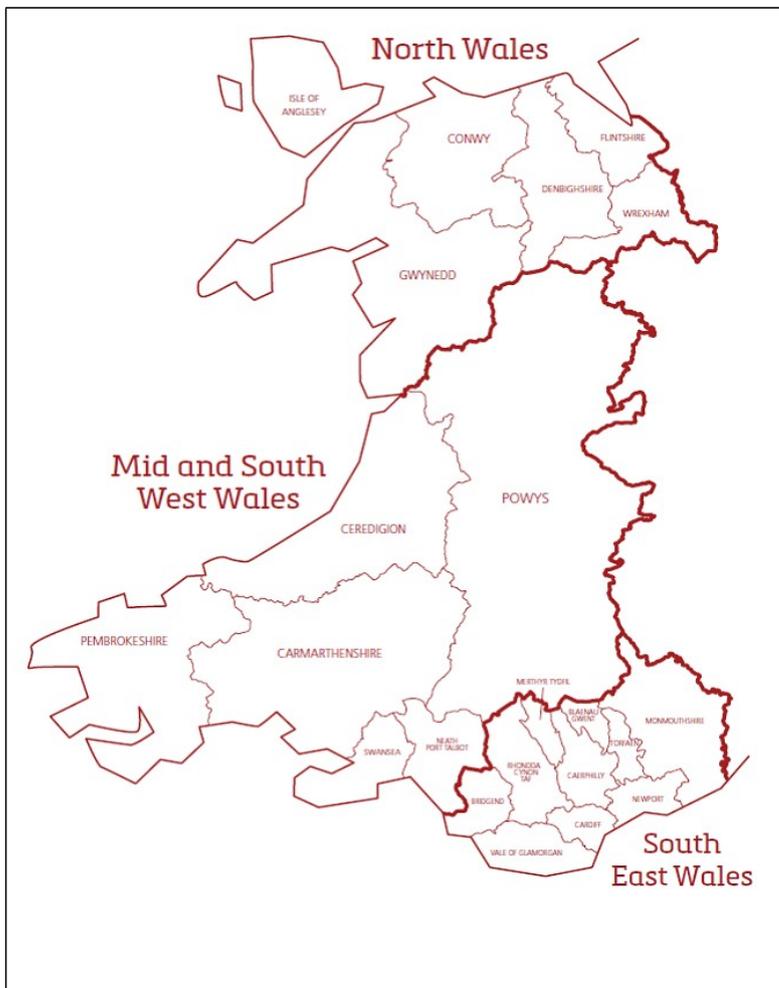


Figure 1 NDF Regions

During the engagement work to date on the NDF, the future of rural Wales has emerged as a key theme. There are concerns that on leaving the European Union, there is the potential for the biggest impacts to be felt in rural areas.

Another theme that has emerged, relates to the perceived role of the planning system in rural areas. To generalise, in urban areas the planning system is viewed as one of many factors that influences outcomes as part of a complex, dynamic interaction of people, policies and decisions taken by a range of actors. In rural areas, the point has been expressed repeatedly, that the planning system is much more influential in shaping outcomes and it is perceived as being a barrier stopping things that would otherwise happen.

The Welsh Government is keen, through this research, to understand what the planning system can do through the NDF over and above Planning Policy Wales and Technical Advice Note 6 ‘Planning for Sustainable Rural Communities’ to support rural areas. Views have also been expressed that national planning policy already supports rural economies, diversification and providing for housing in rural areas and it is not apparent what else could be provided for.

The intention of the research is to achieve a better spatial understanding of areas that are predominantly rural in nature and which rurally focussed policies could support. The research is required to develop a NDF methodology that draws on existing approaches, to set out how rural areas can be identified and then to apply this broadly to identify rural Wales for the purpose of this stage of the NDF process.

Part 1 of this research is based on the three defined regions that will be used to structure the NDF. The rural areas to be identified through this research are not ‘regions’. It is not anticipated that there will be a rural region in the NDF. The rural areas that will be identified will sit within the three regions and rural areas may cross these regional boundaries. The anticipated outcome is the development of NDF policies which relate to rural areas nationally and/or rural focussed policies that are specific to particular rural areas.

1.2 Stakeholder Involvement

As part of the study, Arup has led two approaches to stakeholder involvement:

1. As part of the data / information gathering, Local Planning Authorities in Wales have been contacted to request quantitative information they hold to inform this research. This includes, for example local employment, housing and environmental data; and
2. As part of the SWOT process and in seeking to identify rural priorities, 123 organisations were invited to attend a series of workshop events, representing those interested in the economy, society, culture and environment in Wales. The workshops focused on exploring a range of policy areas and issues, as well as discussions about the strengths, weaknesses, opportunities and threats (SWOT) within each region with a focus on rural areas.

1.3 Purpose

The data / information gathered as part of the study will be presented within the Study Report. This Workshop Report provides the results of the Mid & South West Wales Rural event and provides a factual account of the event, its discussions and initial findings.

Separate Rural Workshop Reports have been prepared for the North Wales, Mid & West and South East Wales rural events.

A SWOT analysis is provided within the full Study Report.

1.4 Structure

This Workshop Report is presented in the following sections:

- Section 2 describes the details of the workshops and those involved;
- Section 3 provides the results of the first stakeholder activity, helping consider which indicators best help define rural areas and which types of economic, social, cultural and environmental infrastructure are most important to the function and success of rural areas in the region;
- Section 4 provides the results of the second stakeholder activity, involving focused discussions about the region's social, cultural, economic and environmental strengths, weaknesses, opportunities and threats – focusing on rural issues.

2 Arrangements and Attendees

2.1 Details

A range of locations, venues, dates and times were explored and those decided upon best reflect the limitations and requirements of the study, considering capacity, accessibility and programme. The details of the Mid & South West Wales event were:

Location	Llandeilo
Venue	The Plough Inn
Date	30 th November 2018
Time	13.30 – 16.00

2.2 Welsh Language

All event materials were supplied in both Welsh and English languages and attendees were invited to participate in the language of their choice.

To facilitate this, Arup were supported by Trosol who provided written translation services.

During group activities at the workshops, any person that wished to communicate in Welsh was able to thanks to a simultaneous translation service, also provided by Trosol.

2.3 Agenda

The structure of the workshop was focused around the following items:

Item	Description
Introductions	The project team were introduced and stakeholders were asked to identify their name and organisation in turn, to help the participants appreciate the diversity and range on interests involved. Housekeeping was also outlined.
The Study	The Welsh Government set the context for the study, providing the background to the NDF, its consultation, the scope of the Arup research, approach to the rural research and programme.
Data and trends	Arup explained the types of ways rural areas can be defined as well as high level economic, social and cultural and environmental information, characteristics and spatial maps that have been sought and help inform the study. Useful trends to show comparisons across the Welsh regions set the context of the study area in advance of the stakeholder activities.
Data definitions and issues	Activity 1 – ‘Sticky-dot’ exercise – helped stakeholders share their views about defining and fostering rural areas, as important considerations for the development of the NDF.

Item	Description
SWOT	Activity 2 – Strengths, Weaknesses, Opportunities and Threats exercise – facilitated discussions around economic, social, cultural and environmental issues pertinent to the rural areas within and beyond the region.
Next steps	Arup and the Welsh Government closed the event by thanking participants for their involvement, explaining how they could stay involved and the next steps for the study and NDF. This included that there would be a shared factual Workshop Report, future focused stakeholder meetings about projects and plans, data collection for publication via the Lle Portal, a Study Report and timeline for the publication of the NDF.

2.4 Presentation

A PowerPoint presentation complemented the above agenda items, providing prompts and helpful text and images. A copy is attached at Appendix A.

2.5 Activities

Stakeholders were asked to participate in two activities as part of the workshop, which are described in turn below.

2.5.1 Activity 1 – ‘Sticky-dot’ exercise

In order to establish the rural policy areas and issues of most interest within the region and whether or not the NDF is the appropriate mechanism to help address these, an interactive session involved stakeholders being asked to help:

- Select different indicators that could best help define rural areas in the context of the region;
- Identify different economic, social, cultural and environmental infrastructure that is the most important to the function and success of rural areas in the region; and
- Whether there are any other ways to define rural areas or valued infrastructure to those identified by Arup and the Welsh Government.

These involved participants being provided with an exact number of sticky dots to place on a series of activity sheets, to record their choices and preferences accordingly.

A copy of the completed activities is provided at Appendix B.

Further explanation alongside a summary of the results is provided in Chapter 3 of this report.

2.5.2 Activity 2 – SWOT

Attendees formed three groups who in turn discussed rural issues pertinent to the region in relation to all of the following broad themes, which reflect the four pillars of sustainable development in Wales:

1. Social and Cultural;
2. Economic; and
3. Environmental.

The sessions were facilitated and scribed to help encourage discussion and record the issues as they were raised.

Each group spent between 20 and 30 minutes discussing each of the themes.

Photographs of the exercise and records of the outputs are provided at Appendix C, with a summary of the discussions provided in Chapter 4 of this report.

2.6 Participants

2.6.1 Attendees

21 participants attended the workshop, representing the following organisations:

- Mid Wales Housing Association
- Brecon Beacons National Park Authority
- Dyfodol i'r Iaith
- Powys County Council
- Ceredigion County Council
- Pembrokeshire Coast National Park Authority
- Aberystwyth University
- National Infrastructure Commission for Wales
- Swansea Bay City Economic Strategy Board
- Campaign for the Protection of Rural Wales
- Mid & South West Wales Fire Service
- Pembrokeshire Coastal Forum
- Persimmon Homes West Wales
- Natural Resources Wales
- Office of the Future Generations Commissioner
- Monmouthshire Housing Association
- Carmarthenshire County Council
- Wales Tourism Alliance
- Aneurin Bevan Health Board
- Western Power Distribution

A copy of the event register is included at Appendix D.

2.6.2 Apologies

Those invited but unable to attend included:

- Community Transport Association
- Neath Port Talbot Council
- Dŵr Cymru Welsh Water
- Associated British Ports
- Institute of Civil Engineers
- Network Rail
- Sport Wales
- Welsh Language Commissioner
- Welsh Sports Association

3 Results of Activity 1 - ‘sticky-dot’ exercise

All outputs from this activity can be found in Appendix B, whilst a summary is provided below.

3.1 Defining Rural Areas in Wales

Participants were asked to place their sticky dot within a row to best represent their choice as to which indicators best help define rural areas in Mid & South West Wales. Participants were able to choose their preferred five from eleven options.

The results, as shown in full at Appendix B, show all of the different options were selected at least once but with evident consensus that some types of indicators are considered to be more important than others for the participants.

For the purposes of this report, a total count has been provided to illustrate the choices. This seeks to help inform the Welsh Government which best reflect indicators that best define rural areas in the region. This is shown below:

Indicators	Number of times selected
Population density / urban sparsity	17
Employment density	5
WIMD Access to Services	4
Rural sectors of employment	11
Distance travelled to work / travel to work areas	10
Distance to trunk road	8
Broadband coverage	8
Company size / proportion SMEs	3
EU Funding / Capital investment / NUTS3	1
Agricultural land	14
Topography	6

The top five indicators that best define rural areas in the region include:

1. Population density / urban sparsity;
2. Agricultural land;
3. Rural sectors of employment;
4. Distance travelled to work / travel to work areas; and
5. Distance to trunk road and Broadband coverage, which were equally selected.

3.2 Fostering Rural Areas in Wales

Participants were asked to place their sticky dot within a row to best represent their choice as to which different economic, social, cultural and environmental infrastructure is the most important to the function and success of rural areas in Mid & South West Wales. Participants were able to choose their preferred five from thirteen options.

The results, as shown in full at Appendix B, show all but one of the different options were selected at least once but with evident consensus that some types of infrastructure are considered to be more important than others for the participants.

For the purposes of this report, a total count has been provided to illustrate the choices. This seeks to help inform the Welsh Government about what types of infrastructure are most valued or prioritised within rural areas in the region. This is shown below:

Access to...	Number of times selected
Affordable housing	15
Business support and funding	6
Education	9
Healthcare	11
High speed broadband	5
International markets	1
Local employment / jobs	14
Public transport	9
Private housing	2
Regional markets in UK and Ireland	2
Rented accommodation	3
Shops and services (e.g. convenience store, post office and bank etc.)	12
Trunk roads	2

The top five types of infrastructure that are considered to be the most important to the function and success of rural areas in the region include:

1. Affordable housing
1. Local employment / jobs
3. Shops and services (e.g. convenience store, post office and bank etc.)
4. Education
5. Healthcare

3.3 Additional Contributions

Participants were encouraged to share any further thoughts about any indicators or infrastructure that could help define or foster rural areas. The results are shown in full at Appendix B and stakeholders scribed the following points in response:

1. Livestock density
2. Farmscape / Wildscape / Marginal Fringe land maps
3. Accessible and reliable rail travel
4. Forestry
5. Land Use and Agricultural Land Classification
6. Cash machines
7. Community facilities
8. Youth Groups
9. Frequency of change to house ownership
10. Proportion of houses bought without access to a mortgage
11. Sense of place as remote (in a qualitative measure, as opposed to proximity)
12. Land use and landscape cover

4 Results of Activity 2 - SWOT

People were encouraged to consider Strengths / Weaknesses as ‘Current’ and Opportunities / Threats as ‘Future’.

SWOT discussions were facilitated, and notes were taken to help capture all of the points raised and shared. These are presented in the sections below.

The analysis of the SWOT is provided in the separate Study Report.

Photographs of the outputs and discussions are provided in Appendix C.

Section 4.4 provides a summary and regional overview.

4.1 Social and Cultural

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Cultural identity • Welsh language speaking areas • Early retirement age (55+) as an asset for communities • Responsiveness and proactiveness of rural communities • Lifestyle • Young Farmer’s movement and similar groups • Strong networks in existing and longstanding communities • Perceived time to reflect and make better decisions (benefit to community planning) • Tourism • Community-based case studies 	<ul style="list-style-type: none"> • Distance to work • Rail infrastructure and routing • Mental health • Service access and provision • Loss of sense of communities through declining facilities or centres e.g. chapels • Patterns of travel to school – impact on health and well-being • Employment opportunities and equality • Commuter hubs over communities • Out-migration of young people (24-30s)

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Tourism and provision of a ‘new offer’/diversification • Community-based renewable schemes • Social innovation and entrepreneurship • SME business hubs • Technology and transport (e.g. EVs) • Resource of early retired community (55+) • Improving digital accessibility and 5G • Place-planning to sustain communities • Business mentorship • Tourism tax • Localised energy generation • Location of ‘futuristic services’ due to space in rural areas • New ways of working e.g. work from home • Modernisation of schools 	<ul style="list-style-type: none"> • Fuel prices and the impact on the rural economy • Social care for the elderly • 16+ access to schools • Patterns of travel to school – impact on health and well-being • Employment opportunities and equality • Commuter hubs over communities • Out-migration of young people (24-30s) • Brexit, including the influence of Irish ports and the connection with Europe

Planning Levers and Barriers were also discussed (being opportunities, mechanisms or constraints to a successful planning policy and development management system), with the following issues raised (all levers):

- Support for local delivery of energy
- Taxation incentives and planning
- Land allocation for community facilities and sustainable renewables
- Place-planning to sustain communities
- Education strategy
- Transport plan
- Need for joined-up policy between different spatial policy spheres

Priorities for the NDF were discussed and the following key points emerged:

- Flexible development
- Create ‘liveability’ to sustain communities
- Linkages to towns and urban centres
- Investment support for development
- Strategic support for local services
- Improved housing stock and typography
- Focus on the retention of singular community facilities and retain existing hubs e.g. village halls
- Support for innovative schemes in rural areas

4.2 Economic

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Tourism • History and heritage assets (physical and otherwise) • International appeal • Rural hubs and satellites • Way of life • Sense of community • Well-being/health • Artisan skills • Brecon historically as a growth area • Agricultural industry • Universities • Land management skills/stewardship 	<ul style="list-style-type: none"> • Domination of tourism • Service provision • Accessibility and modal choice • Access to services and facilities • Critical mass for social infrastructure to maintain viability of settlements and communities • Seasonality of tourism • Large land mass • Bus passes stop at the border • Low wage employment • Transport and the need to drive • Ageing population demographic • Land values – agricultural and other • Housing delivery, particularly affordable housing • Lack of housing and choice which creates challenge for retention of families • Diseconomy of sale • University of the ‘Third Age’

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Growth Deal • Careers/education and brokering qualifications • Digital connectivity and communication • Diversification of tourism • Small and medium developer employment of local people • Retail/commercial town centres • Regional universities and satellite campuses • Bringing in new business directors 	<ul style="list-style-type: none"> • Need for protection • Communities becoming stagnant or stuck in the past • Low employment • Agriculture and the relationship with Brexit • Expense related to service provision • Challenge getting infrastructure financed • Management of growth whilst maintain culture • Super Ferry Dublin and its impact on trade and the regional economy • Movement of services and population to the south east of Wales • Aspirations of children in rural areas • NPT and EU funds

Planning Levers and Barriers were also discussed, with the following issues raised:

Levers:

- Mid Wales growth deals and business support
- Rural sustainability
- Weight of evidence base
- Rural issues that vary by LPA, with resultant impact on capacity, need and opportunity
- Relaxed planning
- The importance of diversification and Welsh language
- Revamping TAN 6
- Rural Enterprise Zone

Barriers:

- Peripherality and the vulnerability of such areas
- Trade-off between economy and the environment

Priorities for the NDF were discussed and the following key points emerged:

- Focusing on population in the middle of the region
- Conservation of the setting of rural areas as well as the asset
- Mapping issues to ensure commonality
- Housing delivery
- Infrastructure and services
- Adaptation to changing needs and demands of rural areas
- Diversification and resilience of rural areas

4.3 Environmental

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Tourism • Marine environment • Built heritage • Resources 	<ul style="list-style-type: none"> • Uncertainty around future of farming and knock-on effects on land management • Capacity issues within tourism • Public transport • Accessibility • Suitability of rural areas for EV infrastructure • Water pollution • Tourism ‘hot-spots’ – congestion and landscape impacts • Grid connectivity • Over-reliance on the private car

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Tourism tax to benefit local areas • Housing • Reservoirs as attractions • Offshore renewable energy • Circular economy – using waste to benefit • Balancing renewable energy generation with landscape • Community energy generation • Major events to showcase the environment • Diversification of tourism e.g. Outdoor activities as unique products – more than tourism accommodation • Transport infrastructure for long distance travel • Energy infrastructure • Car sharing and parking infrastructure • Lifestyle tourism • Sustainable transport 	<ul style="list-style-type: none"> • Industrialisation of farming – pollution slurry and environmental impact • Future of agriculture vs. impact on environment • Water pollution • Fishing • Protection of non-designated areas via policy • Air pollution and the carbon impacts of farming • Perceptions and misconceptions of farming/agriculture operation (i.e land-based farming vs. wider activities) • Loss of sheep farming and impact on uplands vegetation • Financing of the grid and its operation

Planning Levers and Barriers were also discussed, with the following issues raised:

Levers:

- Agricultural and farming Permitted Development
- Valuing of environment – e.g. environmental capital
- Subsidisation and incentivisation for people to take ideas such as the circular economy seriously
- Increased and strengthened environmental assessment
- Strategic-level planning for electricity infrastructure

Barriers:

- Limitations of planning system to resolve all problems and challenges
- Policy vs. practice

Priorities for the NDF were discussed and the following key points emerged:

- A rural Wales for everyone
- Economic growth vs. need for environmental protection
- Finding the balance in who benefits
- Electric vehicle infrastructure
- Innovation vs. protection
- Planning for different areas and types of farming activities
- Grid connectivity and energy infrastructure at the national level
- Balance between developing rural areas and preventing isolation and inaccessibility

4.4 Summary: Regional Overview

4.4.1 Key points

Ten key points raised by stakeholders with an interest in rural areas within the Mid & South West Wales region were:

1. There is a clear need to balance economic growth and innovation with protection of environmental assets
2. Welsh language is a strong cultural asset in rural communities but is under threat with population changes and reduced access to Welsh-speaking schools
3. There is an opportunity for community involvement and led developments / initiatives and entrepreneurship which could be supported through the planning process
4. There is a strong community resilience, but this is under threat from second homes, out-migration and influx of the commuting population, of which create 'Commuter Hubs' over genuine communities
5. The high quality natural environment is valued and both designated and non-designated areas need to be protected into the future with climate change
6. Housing needs to be better connected to community facilities and services, and more should be delivered by local builders and people
7. Tourism is an important economic driver and the sector presents several regional opportunities related to diversification, including enviro-tourism
8. There is a reliance on the private car and a need for electric vehicle charging infrastructure in rural areas in the future
9. Isolation, loneliness and access to health services need to be addressed given changes in aging population and lack of funding to support social care / community facilities and services
10. There are opportunities to diversity with the circular economy including through waste and ample opportunities within regional renewable energy generation

4.4.2 How the NDF could or should help the rural areas

Stakeholders suggested that the NDF could or should mainly help rural areas in the following ten ways:

1. The need for sustainable transport infrastructure to improve connectivity to urban centres and towns, including via rail and electric vehicle infrastructure
2. Concern regarding loss of communities due to commuting patterns and out-migration of younger generation, alongside the need to deliver a housing stock and typology that meets the demands of the region and functions to retain existing communities
3. The need to deliver better, high-wage employment opportunities and improve service access and provision
4. Recognition of the region's strong cultural identity and Welsh language presence, however, concern that development needs to help protect and increase use of the Welsh language
5. High quality environmental and heritage assets, including the marine environment
6. Tourism strength and opportunities to create a 'new offer' within the region via diversification, and to generate regional economy gains e.g. through tourism tax
7. Opportunities for social innovations and entrepreneurship in rural areas, and the potential for these to be supported by planning system and investment
8. Need for planning and land allocation for community facilities to create 'liveability' and create sense of place
9. Threat associated with Brexit on agriculture as well as the potential for international ports within Ireland competing for future trade
10. Importance of expanding renewable energy, including via offshore and community-led renewable schemes, and develop a Low Carbon economy within Mid & South West Wales

Appendix A

Mid & South West Wales Rural Workshop Presentation

NDF Rural Areas Workshop

Mid & West Wales / 30 November 2018



Llywodraeth Cymru
Welsh Government

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Agenda

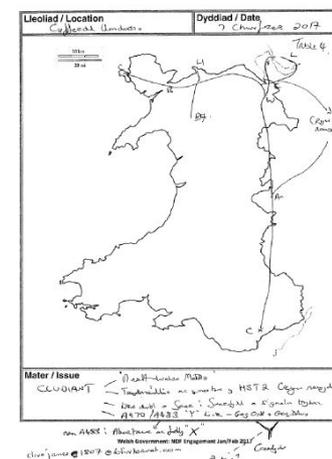
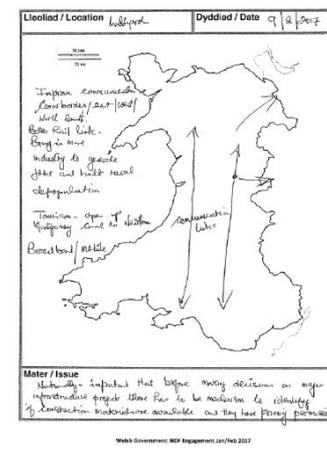
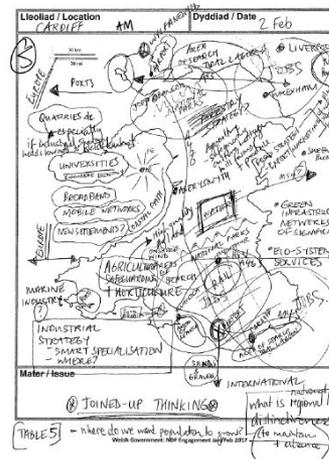


1. Introductions
2. The Study
3. Data and trends
4. Data definitions and issues



Break

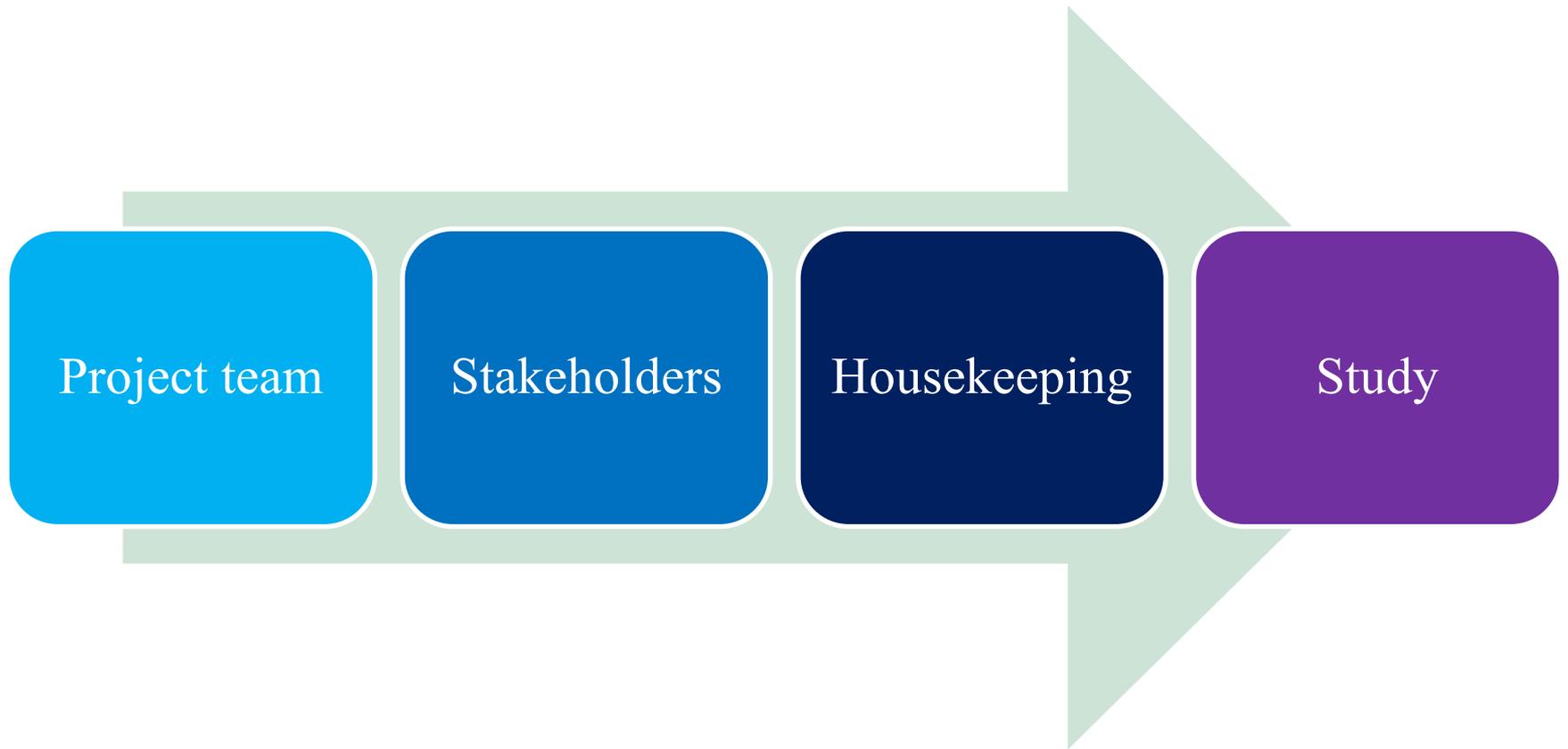
5. SWOT
6. Next steps
7. Close



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Introductions



The Study

- National Development Framework (NDF)
- NDF Consultation
- Scope of Research
- NDF Regions
- **Rural Areas**
- Study to be completed in February 2019



Polisi Cynllunio Cymru
Fframwaith Datblygu Cenedlaethol
Planning Policy Wales and the
National Development Framework

Planning in Wales



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Welsh Government

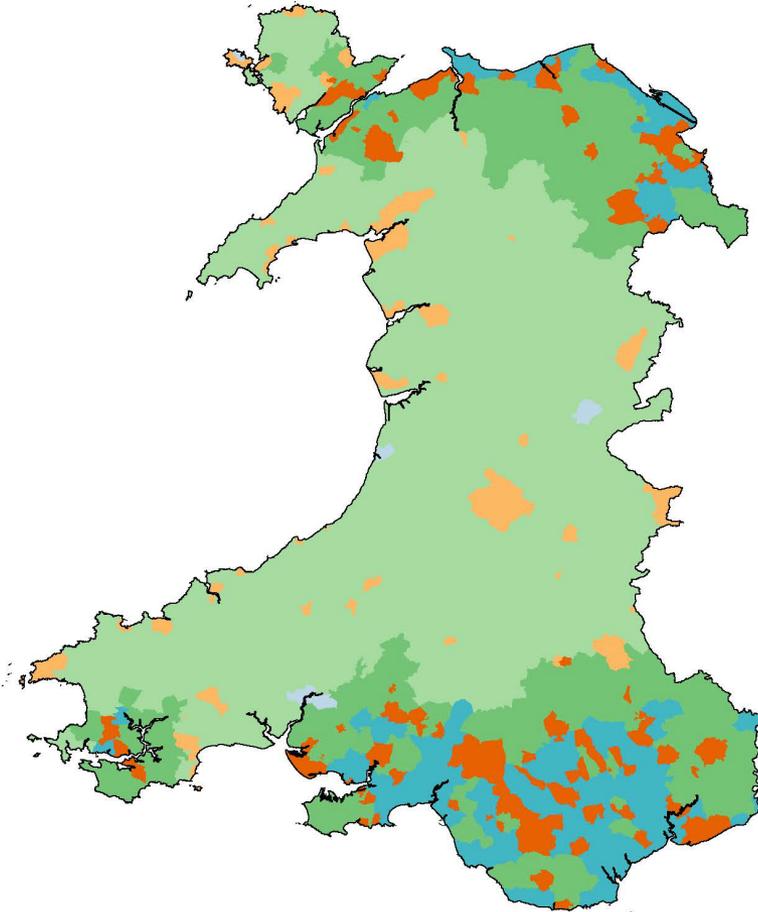
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Data and Spatial Maps

Economic	Social and Cultural	Environmental
Employment	Population	National Parks
Unemployment	Access to services	Designations
GVA	WIMD	AQMAs
GDP	Welsh language	Listed Buildings
Work in primary sector: <ul style="list-style-type: none"> ○ Fishing ○ Farming ○ Minerals extraction ○ Mining 	Method of travel to work	Flood risk areas
	Educational attainment	Renewables
	Road and rail	Agricultural land

Rural-Urban Classification for Lower Layer Super Output Areas (LSOAs), 2011

Wales

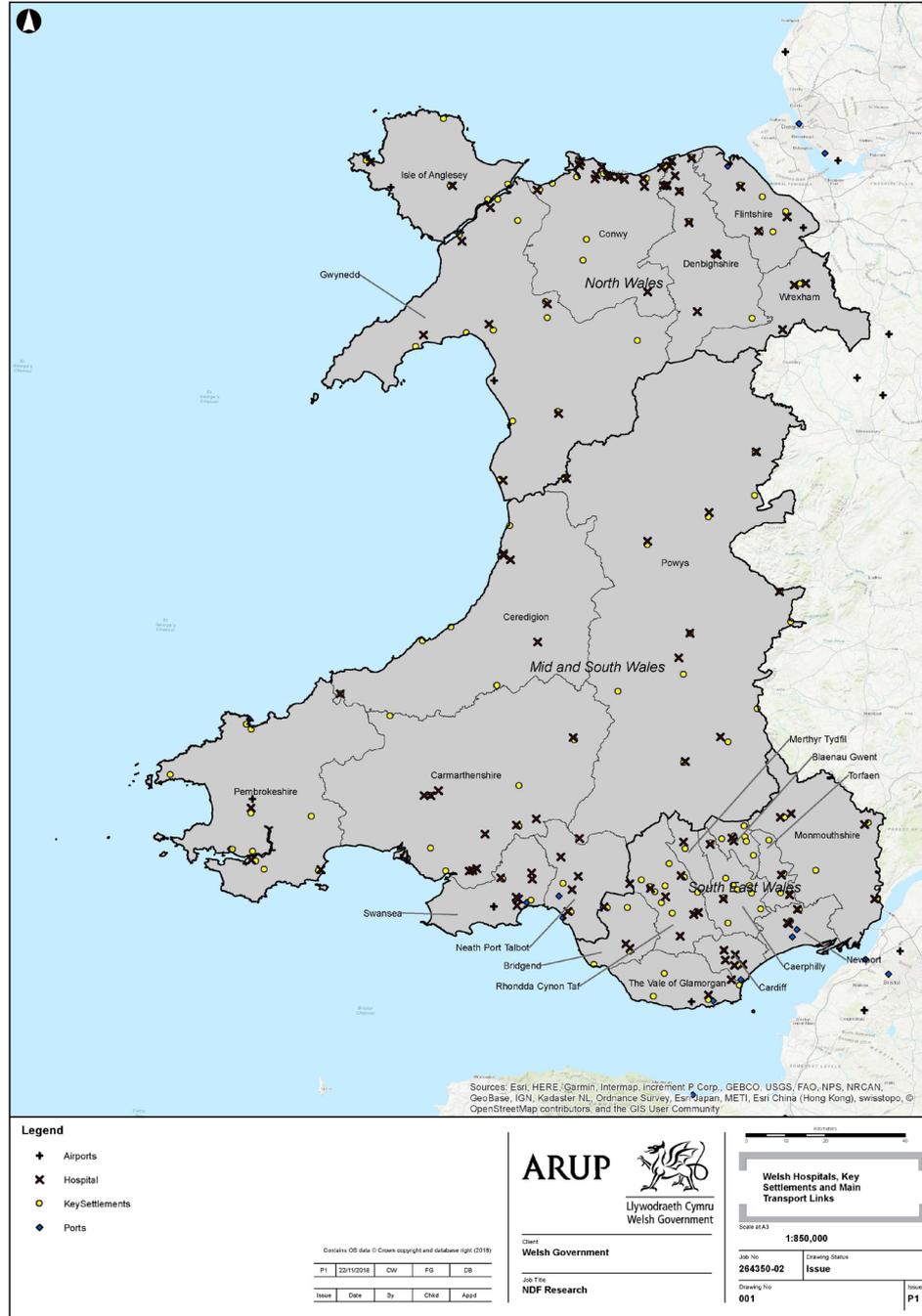


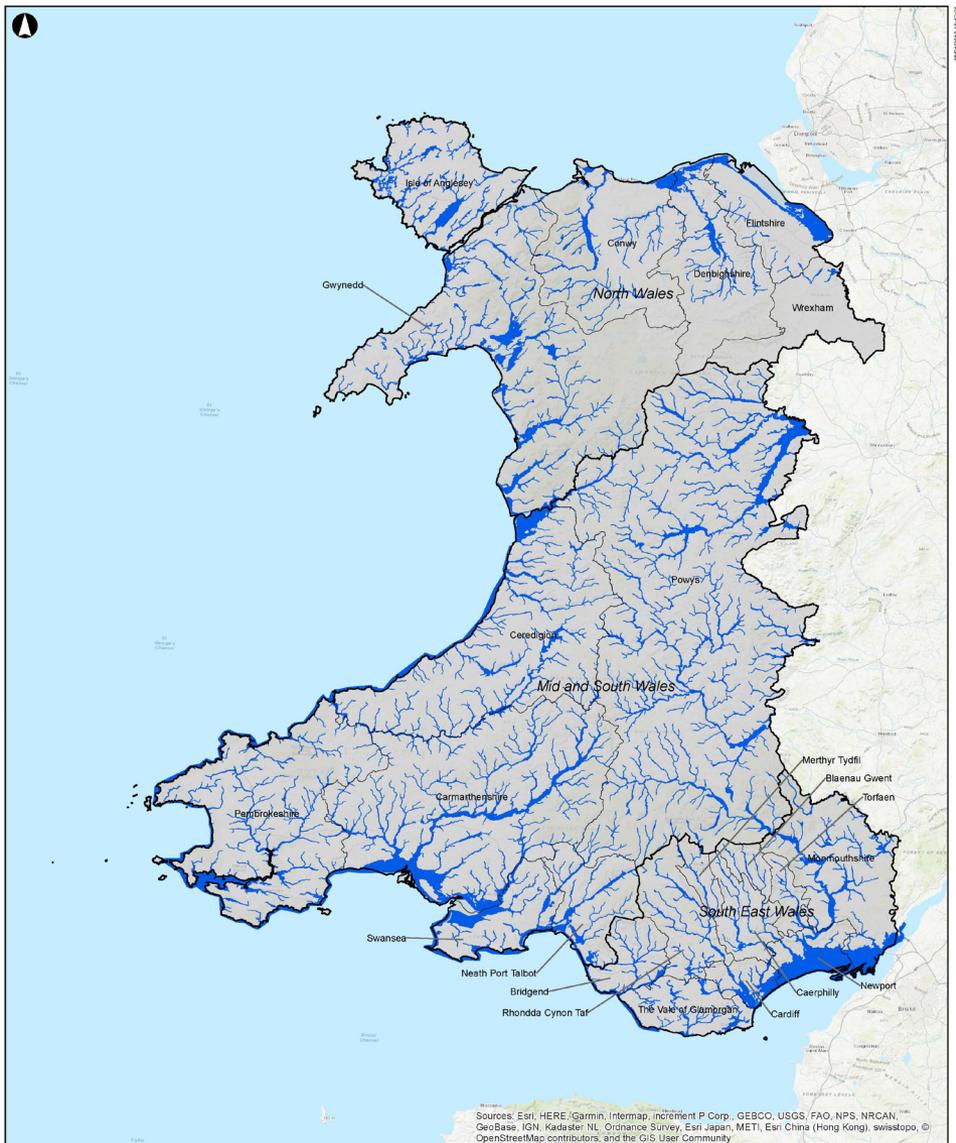
Rural-urban classification

Urban major conurbation	Rural town and fringe
Urban minor conurbation	Rural town & fringe in a sparse setting
Urban city and town	Rural village
Urban city & town in a sparse setting	Rural village in a sparse setting

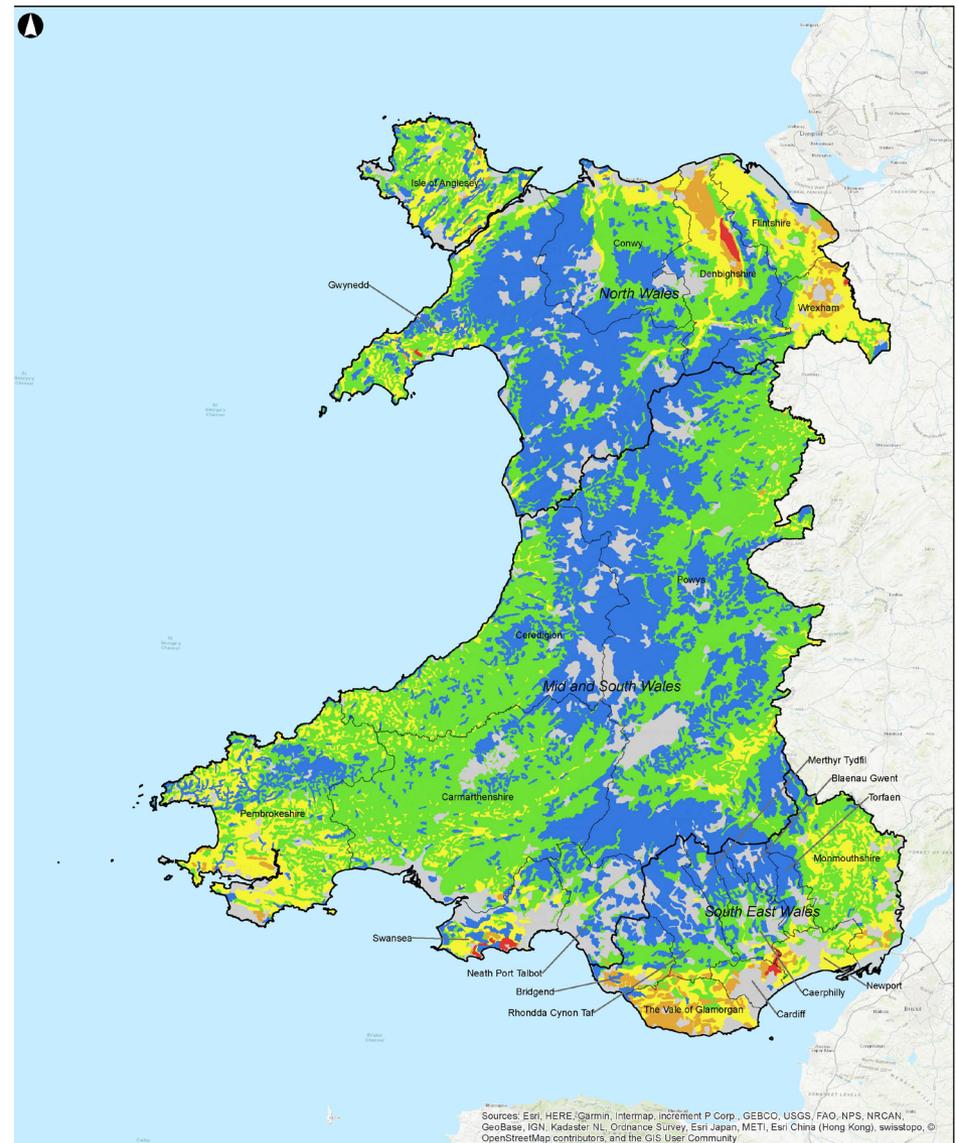
The Rural-Urban Classification is a Government Statistical Service product developed by the Office for National Statistics; the Department for Environment, Food and Rural Affairs; the Department for Communities and Local Government; and the Welsh Assembly Government, in collaboration with Sheffield and Nottingham Universities.

A3





Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, OpenStreetMap contributors, and the GIS User Community



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, OpenStreetMap contributors, and the GIS User Community

Legend

- Flood Alert Area
- Welsh Regions
- Welsh County

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P1	21/11/2018	CW	FG	DB
Issue	Date	By	Check	App'd

ARUP
Llywodraeth Cymru
Welsh Government

Flood Alert Areas

Scale at A3: 1:850,000

Client: **Welsh Government**

Job No: **264350-02**

Drawing Status: **Issue**

Job Title: **NDF Research**

Drawing No: **001**

Issue: **P1**

Legend

- Non-Agricultural
- Grade 1
- Grade 2
- Grade 3
- Grade 4
- Grade 5

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P1	21/11/2018	CW	FG	DB
Issue	Date	By	Check	App'd

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Welsh Government

Welsh Agricultural Land Classification

Scale at A3: 1:850,000

Client: **Welsh Government**

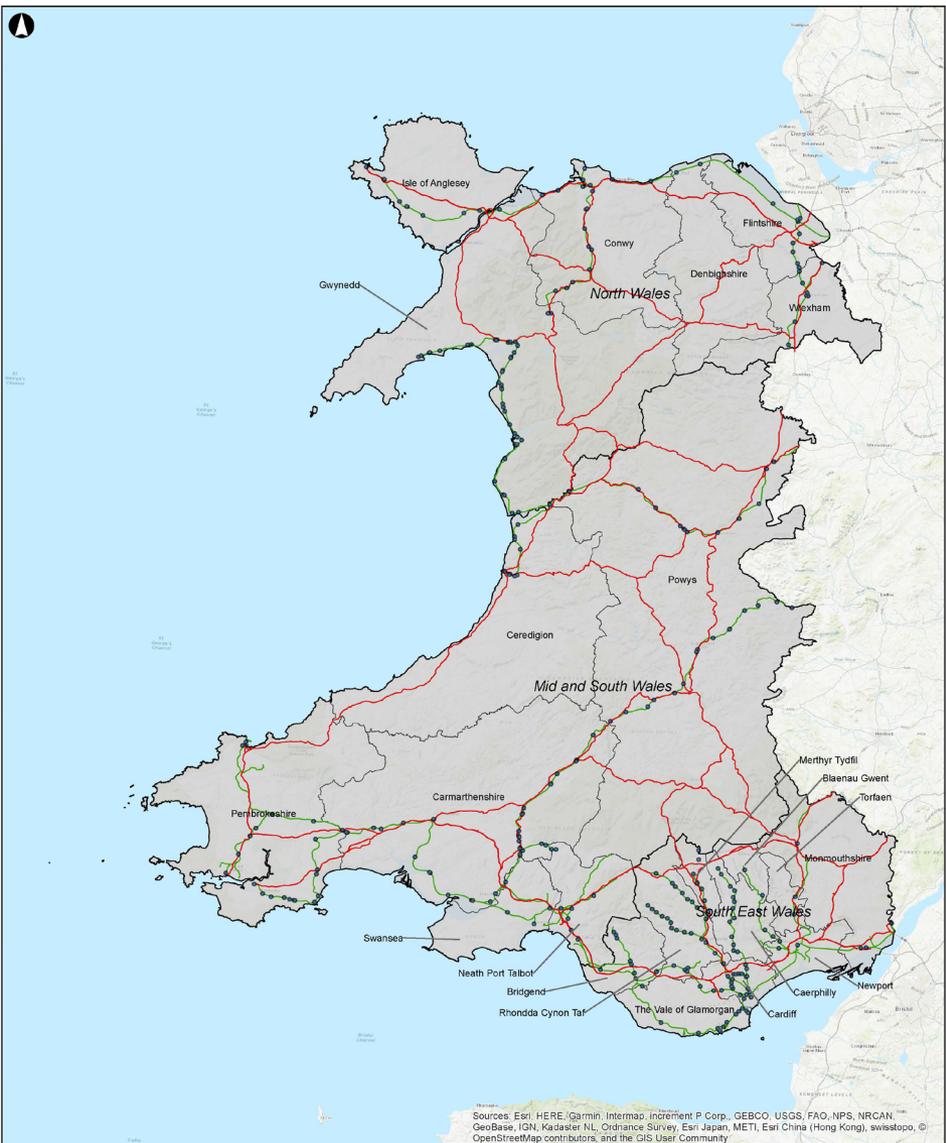
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Drawing Status: **Issue**

Job Title: **NDF Research**

Drawing No: **001**

Issue: **P1**



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community

Legend

- Railway Station
- Trunk Road
- Railway
- ▭ Welsh Regions
- ▭ Welsh County

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P1	21/11/2018	CW	FG	DB
Issue	Date	By	Chkd	Appd

ARUP
 Llywodraeth Cymru
 Welsh Government

Client
Welsh Government

Job Title
NDF Research

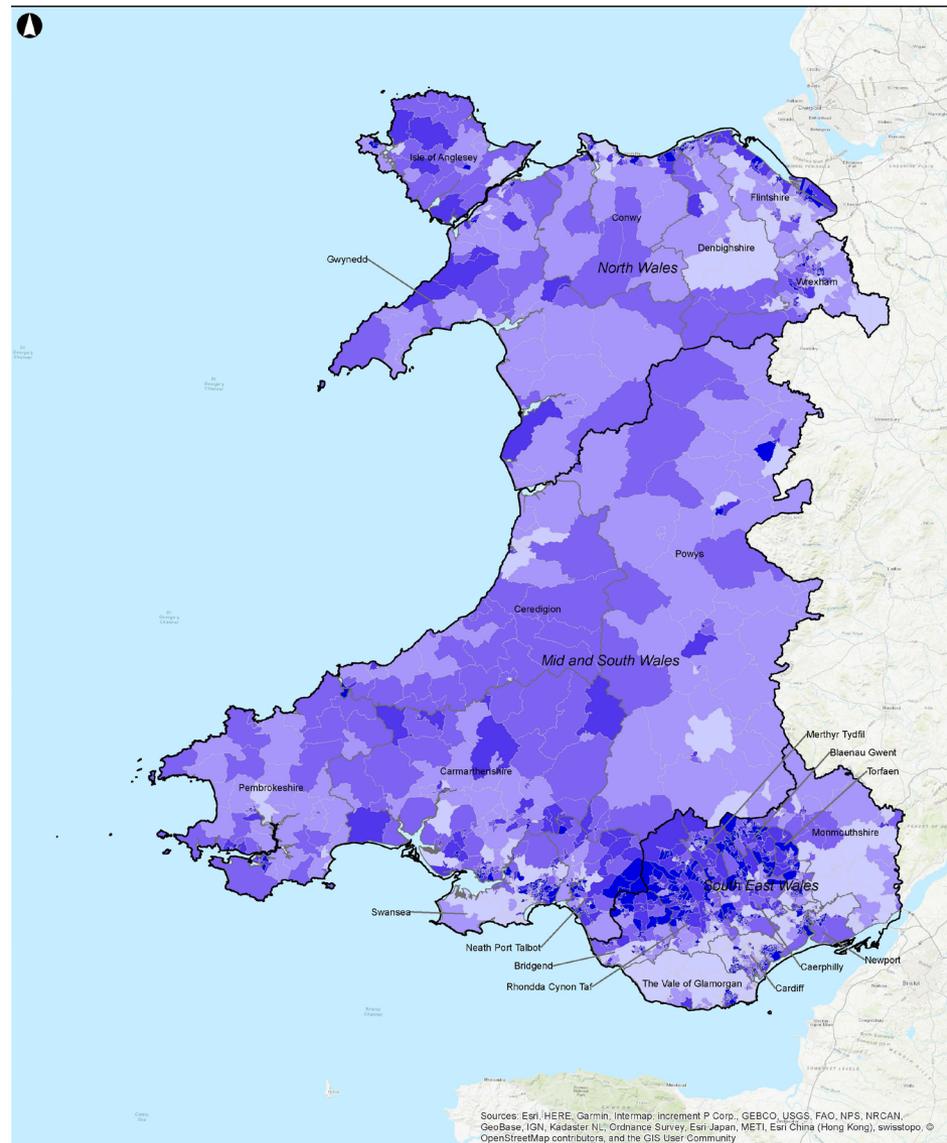
Scale at A3
1:850,000

Job No
284350-02

Drawing Status
Issue

Drawing No
001

Issue
P1



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community

Legend

Welsh Index of Multiple Deprivation

- Most Deprived
-
-
-
-
- Least Deprived

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P1	20/11/2018	CW	FG	DB
Issue	Date	By	Chkd	Appd

ARUP
 Llywodraeth Cymru
 Welsh Government

Client
Welsh Government

Job Title
NDF Research

Scale at A3
1:850,000

Job No
284350-02

Drawing Status
Issue

Drawing No
001

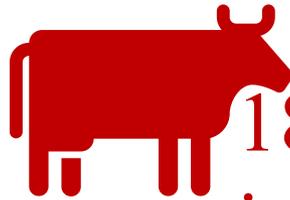
Issue
P1

Characteristics – Mid & West Wales



6%↓

Age 0-15



18,000
jobs in
agriculture



House Prices ↑ 11%

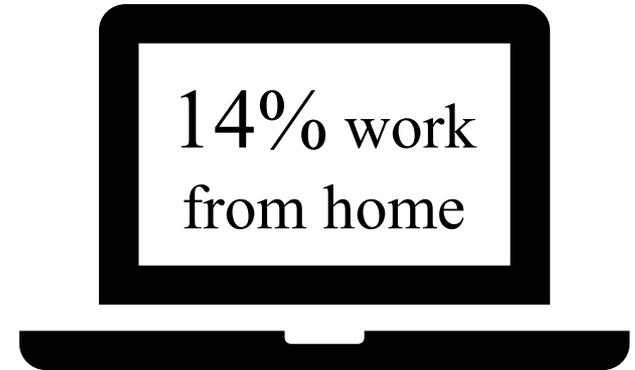
24%

Speak
Welsh



78 jobs for
100 people

14% work
from home



Trends – Comparison across Welsh Regions

Age Structure 2001-2017



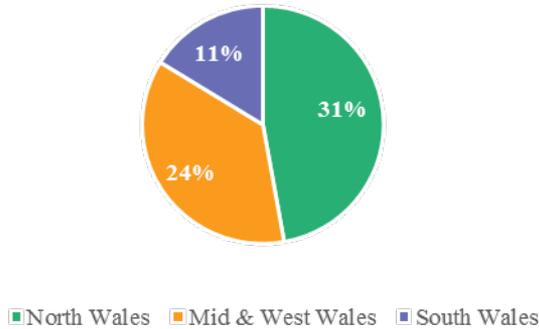
Employment in Agriculture



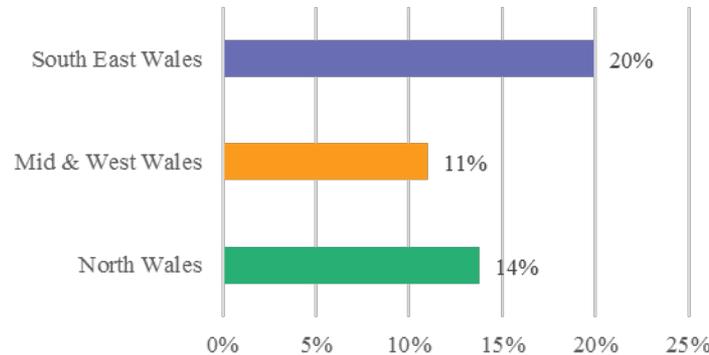
Annual pay - gross



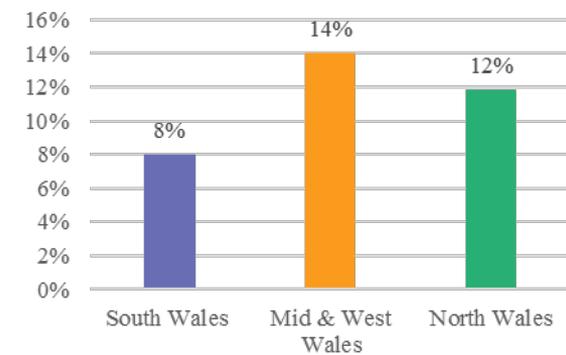
Percentage able to speak Welsh



House Prices 2013-2018



Work mainly at or from home



Definitions and Issues

1. Indicators that could help define rural areas
2. The most important infrastructure;
 - Economic
 - Social and cultural
 - Environmentalto the function and success of rural areas in your region

Please place a sticker in the area that best represents your choices.

Anything else please tell us....



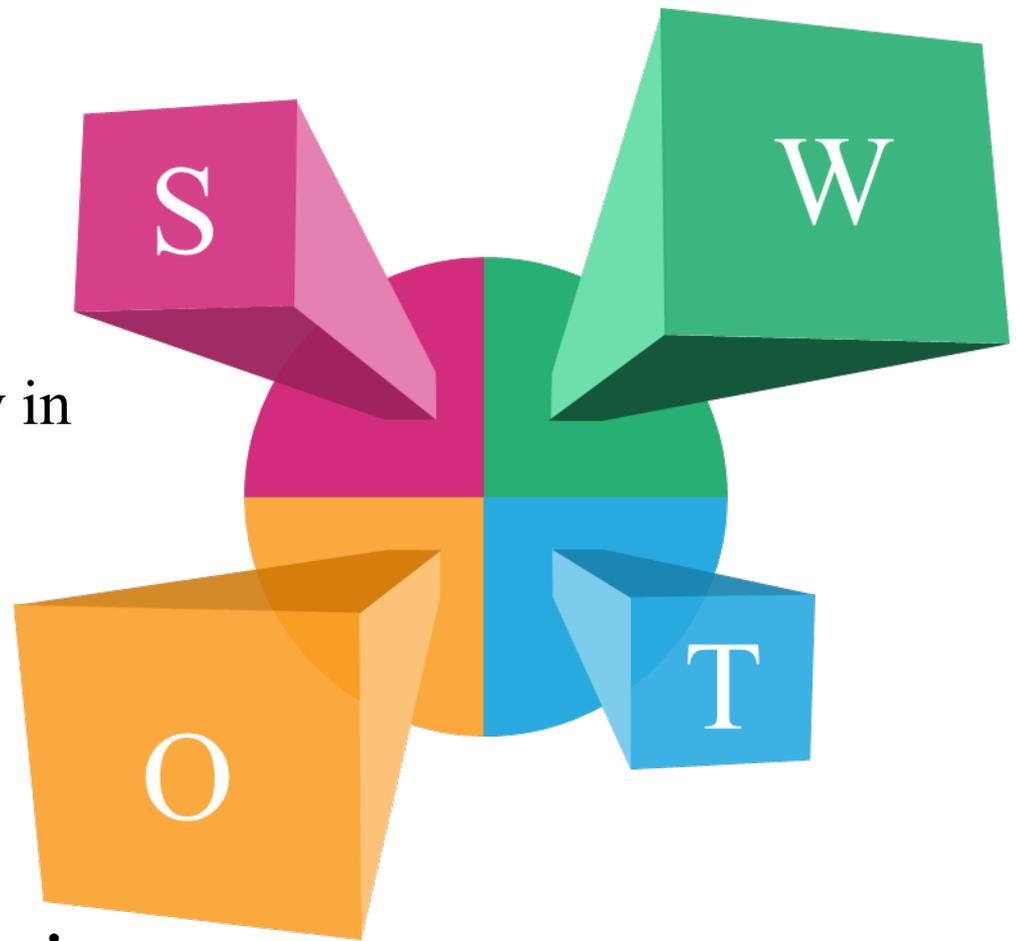
SWOT

Facilitated stakeholder activity in three groups:

1. Economic
2. Environmental
3. Social and cultural

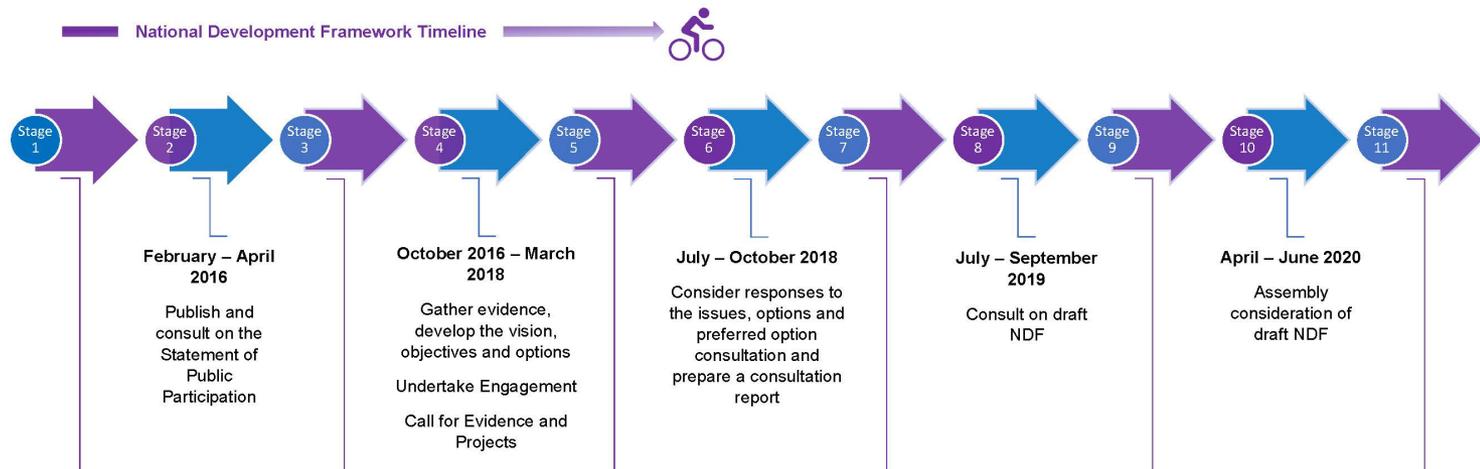
Structured around

- a) SWOT for the NDF
- b) Planning levers and barriers**
- c) Priorities for the region – focusing on **rural areas** and issues at the **national scale**



Next Steps

- Factual Workshop Report
- Focused stakeholder meetings about projects and plans
- Data collection for publication via Lle Portal
- Study Report
 - SWOT to support the development of national planning policy
 - Provide direction for planning in rural areas
- Publication of the NDF



Thank you

For further information contact:
Russell.Dobbins@gov.wales



Llywodraeth Cymru
Welsh Government

ARUP

Appendix B

Sticky Dot Activity Outputs

NDF

Rural Areas Workshop

Activity Pack

Mid & South West Wales
30 November 2018



Llywodraeth Cymru
Welsh Government

ARUP

Diffinio Ardaloedd Gwledig yng Nghymru

Isod, mae ystod eang o ddangosyddion posibl a allai helpu i ddiffinio ardaloedd gwledig.

Yn eich barn chi, pa bump dangosydd yw'r gorau, neu'r mwyaf defnyddiol?

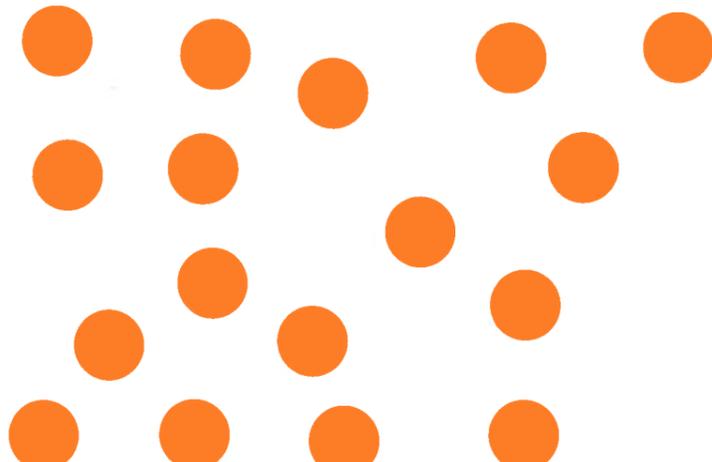
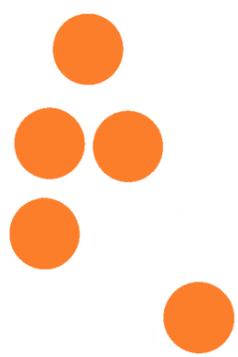
Rhowch sticer mewn hyd at bump rhes sy'n cynrychioli eich dewis.

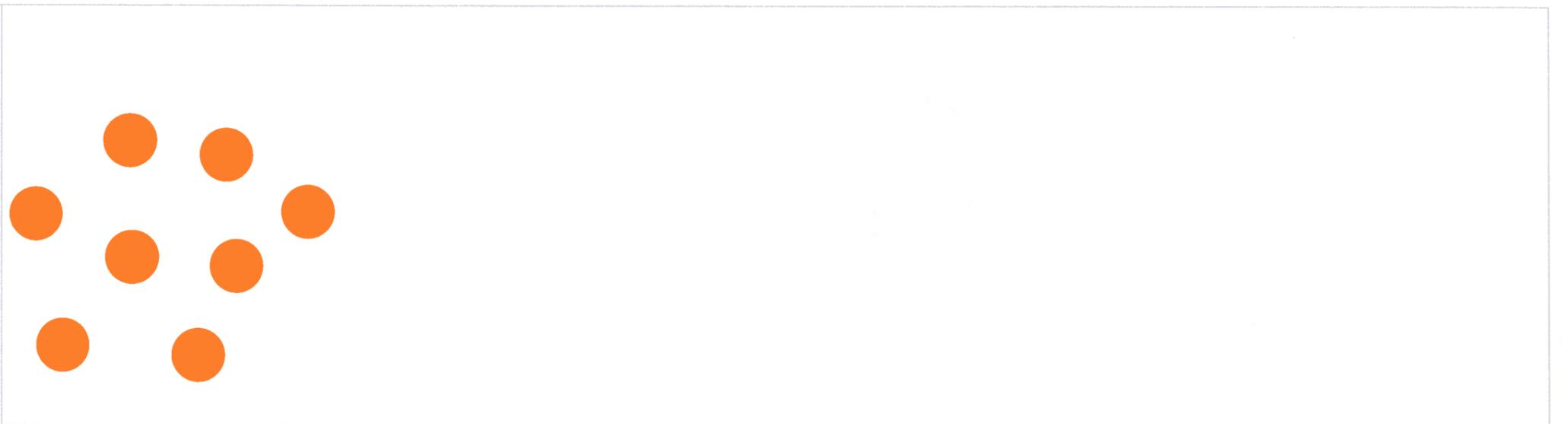
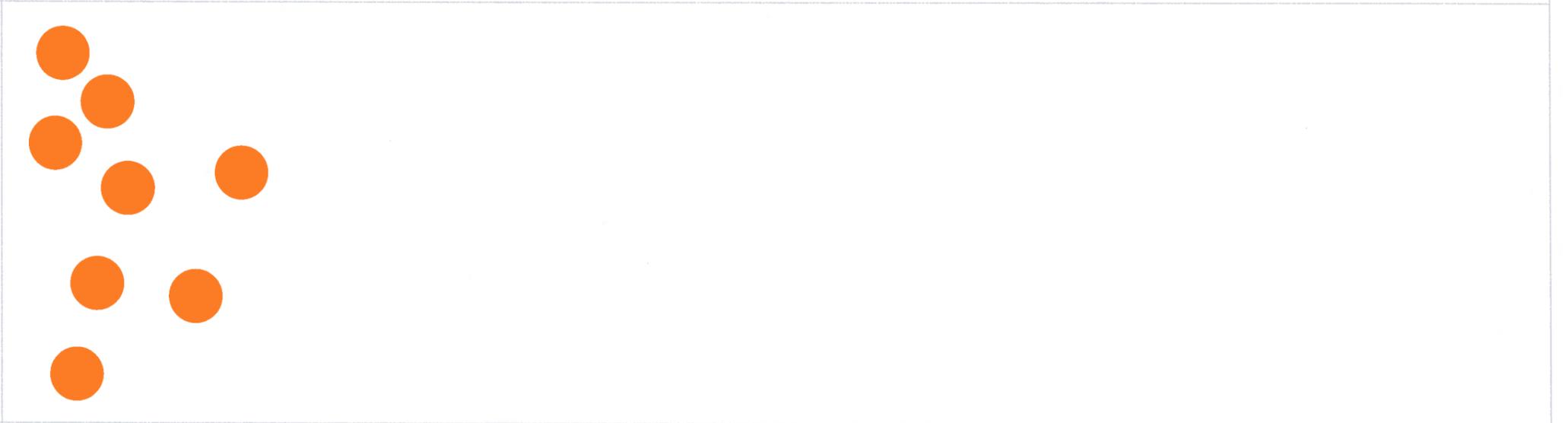
Defining Rural Areas in Wales

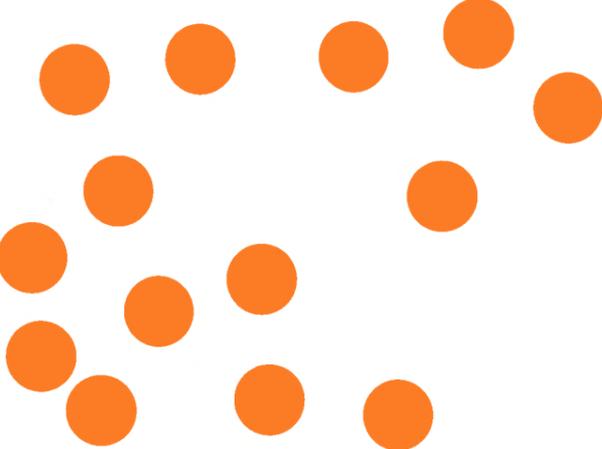
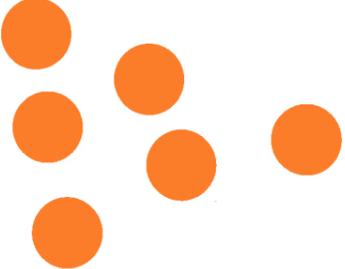
Below is wide range of potential indicators that could help define rural areas.

Which five indicators do you consider to be the best or most useful?

Please place a sticker in up to five row(s) that represents your choice.

Dangosyddion / Indicators	Dewisiadau / Choices
<p>Dwysedd poblogaeth / teneurwydd trefol</p> <p>Population density / urban sparsity</p>	
<p>Dwysedd cyflogaeth</p> <p>Employment density</p>	

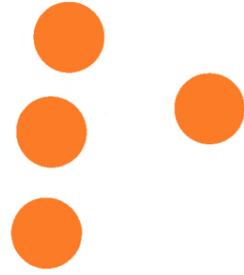
<p>Pellter i gefnffordd Distance to trunk road</p>	 <p>A scatter plot with 10 orange circular data points. The points are clustered in the upper-left quadrant of the plot area, indicating a high value for the y-axis variable and a low value for the x-axis variable.</p>
<p>Signal band eang Broadband coverage</p>	 <p>A scatter plot with 10 orange circular data points. The points are clustered in the upper-left quadrant, similar to the first plot, indicating high values for the y-axis variable and low values for the x-axis variable.</p>
<p>Maint cwmnïau / cyfran y busnesau bach a chanolig Company size / proportion SMEs</p>	 <p>A scatter plot with 3 orange circular data points. The points are vertically aligned on the left side of the plot, indicating low values for the x-axis variable across different values of the y-axis variable.</p>

<p>Cyllid yr UE / Buddsoddiad cyfalaf / NUTS3</p> <p>EU Funding / Capital investment / NUTS3</p>	
<p>Tir amaethyddol</p> <p>Agricultural land</p>	 <div data-bbox="1605 674 2148 1213" style="background-color: #ff69b4; padding: 10px; display: inline-block;"> <p>Livestock density</p> </div> <p>stry,</p> <p>Use</p> <p>ture land</p>
<p>Topograffi</p> <p>Topography</p>	 <p>Classification (2017 map)</p> <p>{ Farmscape / wildscape / Marginal Fringe</p>

LANDMAP

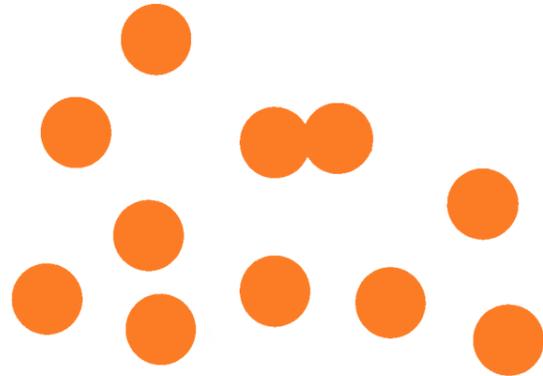
Mynediad i Wasanaethau MALIC

WIMD Access to Services



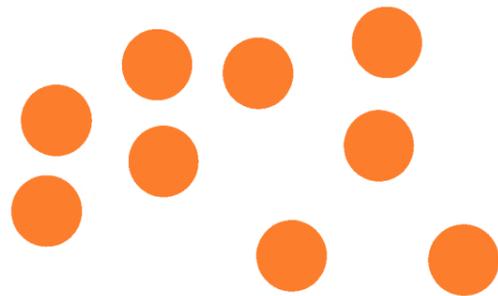
Sectorau cyflogaeth gwledig

Rural sectors of employment



**Pellter a deithiwyd i'r gwaith /
ardaloedd teithio i'r gwaith**

**Distance travelled to work / travel to
work areas**



Accessible +
reliable rail
travel.

Meithrin Ardaloedd Gwledig yng Nghymru / Fostering Rural Areas in Wales

Isod, mae rhestr o wahanol seilwaith economaidd, cymdeithasol, diwylliannol ac amgylcheddol.

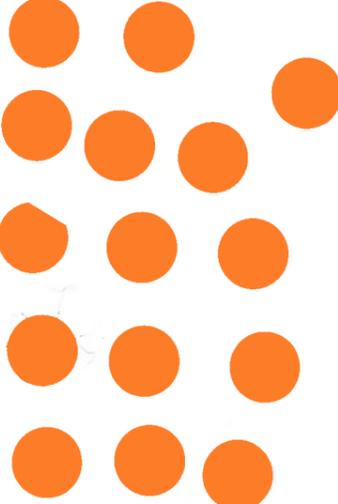
Below is a list of different economic, social, cultural and environmental infrastructure.

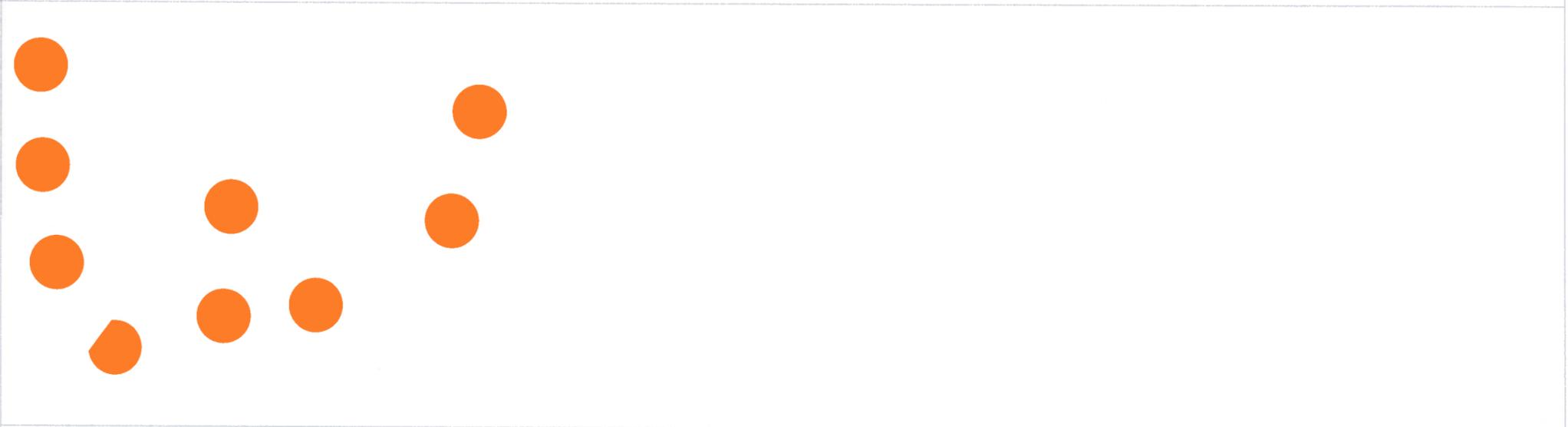
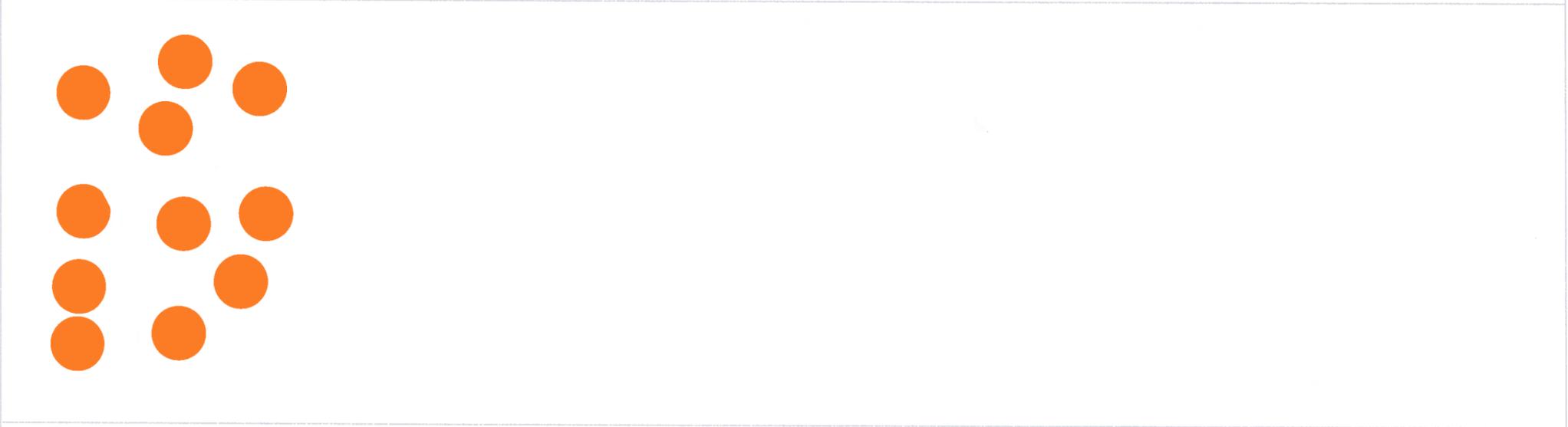
Yn eich barn chi, pa bump sydd bwysicaf ar gyfer swyddogaeth a llwyddiant ardaloedd lleol yn eich rhanbarth?

Which five do you consider to be the most important to the function and success of rural areas in your region?

Rhowch sticer ym mhob un o'r rhesi sy'n cynrychioli eich dewis.

Please place a sticker in each of the rows that represents your choice.

Mynediad i... / Access to...	Dewisiadau / Choices
Tai fforddiadwy Affordable housing	
Cymorth a chyllid busnes Business support and funding	

Mynediad i... / Access to...	Dewisiadau / Choices
Addysg Education	 A scatter plot for the 'Education' category. It features 8 orange circular data points. The points are distributed across the horizontal axis, with a concentration on the left side and a few points extending towards the right. The vertical positions of the points vary, creating a sparse, irregular pattern.
Gofal iechyd Healthcare	 A scatter plot for the 'Healthcare' category. It features 11 orange circular data points. The points are clustered in the left half of the plot, with a higher density in the middle-left area. There are fewer points extending towards the right side.
Band eang cyflym High speed broadband	 A scatter plot for the 'High speed broadband' category. It features 5 orange circular data points. The points are tightly clustered in the left half of the plot, with a slight spread in vertical position. There are no points extending towards the right side.

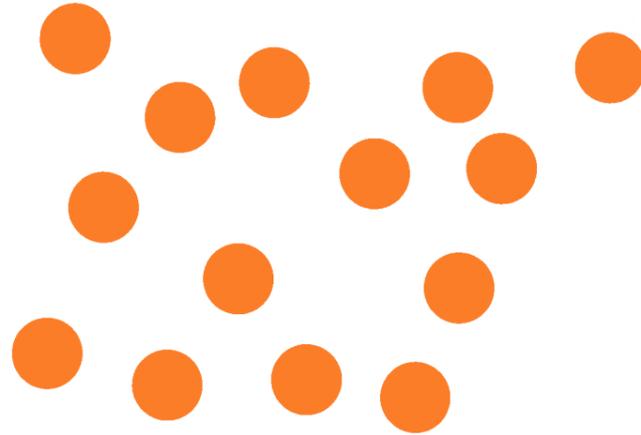
Mynediad i... / Access to...

Dewisiadau / Choices

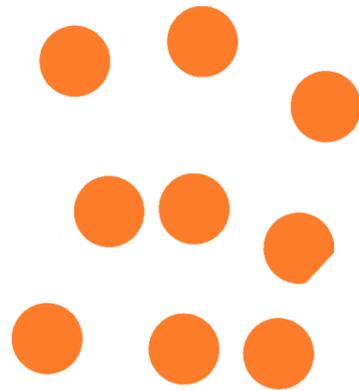
**Marchnadoedd rhyngwladol
International markets**

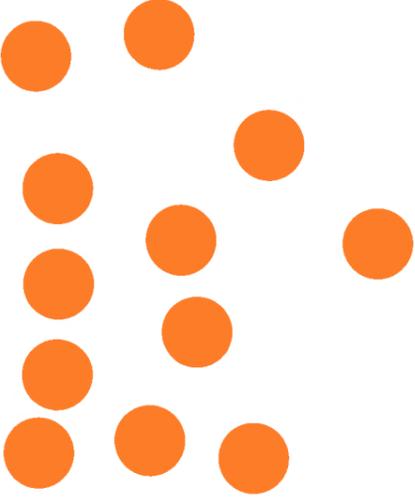


**Cyflogaeth/swyddi lleol
Local employment / jobs**



**Trafnidiaeth gyhoeddus
Public transport**



Mynediad i... / Access to...	Dewisiadau / Choices
Siopau a gwasanaethau (e.e. siop gyfleus, swyddfa bost a banc ac ati) Shops and services (e.g. convenience store, post office and bank etc.)	
Cefnffyrdd Trunk roads	

Diffinio a Meithrin Ardaloedd Lleol yng Nghymru

Defining and Fostering Rural Areas in Wales

Hoffem wybod a ydych chi'n ystyried unrhyw wahanol ffyrdd o ddiffinio ardaloedd gwledig yn eich rhanbarth, a ph'un a ydych chi'n ystyried bod unrhyw fathau eraill o seilwaith cymdeithasol, diwylliannol ac amgylcheddol yn werthfawr i chi yn eich ardal wledig.

We would like to know if you consider there to be any different ways you define rural areas in your region, and whether you consider there to be any other types of social, cultural and environmental infrastructure that you value in your rural area.

Gwnewch nodyn ar ein map isod neu ysgrifennwch eich sylw ar nodyn gludiog a'i osod rywle yma.

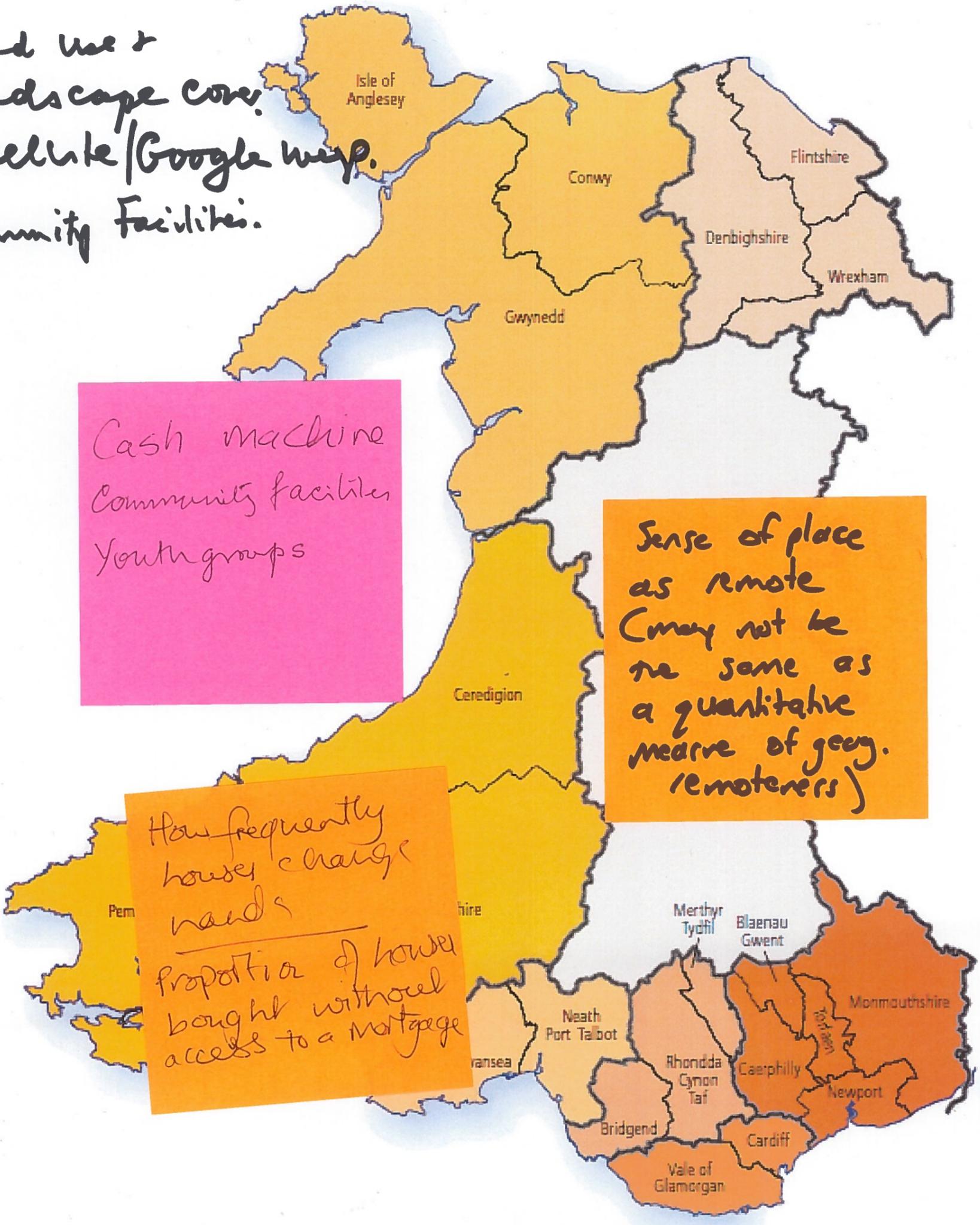
Please annotate our map below or write your comment on a post-it-note and place it somewhere here.

Land use & landscape cov.
Satellite/Google map.
Community facilities.

Cash machine
Community facilities
Youth groups

Sense of place
as remote
(may not be
the same as
a quantitative
measure of geog.
remoteness)

How frequently
houses change
hands
proportion of houses
bought without
access to a mortgage



Appendix C

SWOT Activity Photos



ECONOMIC

WEAKNESSES

SERVICE
"SWEET
SPOT"

TOURISM
DOMINATES

DISECONOMY
OF
SCALE.

IS THERE
ENOUGH?

LOW
WAGES

LARGE

BUS PASSES

TEND TO
HAVE

STRENGTHS

HISTORY -
PHYSICAL +
OTHERWISE

TOURISM -

10%
COMMITTED
SUM
IN AREA OF
ON SITE

INT'L
APPEAL
(WBA)
(AUS/NZ)

ARTISAN
SKILLS

RURAL
HUBS +
SATELLITE

BRECON
HISTORICALLY
AS A
GROWTH
AREA

WELLBEING/
HEALTH.

SENSE
OF
COMMUNITY

WAY OF
LIFE

OPPORTUNITIES

GROWTH
DEVELOPMENT

CAREERS
EDUCATION/
BROKENING/
QUALIFICATIONS

DIGITAL
COMMS

TOURISM -
DIVERSIFICATION

S + M
DEVELOPERS
EMPLOY
LOCAL
PPC

RETAIL/
COMMERCIAL/
TOWN
CENTRES

UNI'S
BRANCHING
OUT -
LOCALS/
QUALIFICATIONS

DIGITAL
CONNECTIVITY

ANALYTICS -
GROWTH
COMPANY.

USE
UNI'S
BETTER

BRINGING
IN NEW
BUSINESS
DIVERSITY

SATELLITE
CAMPUSES

PROVIDE
MORE
LOCALLY OR
REFER
TO OTHERS

ECONOMIC

WEAKNESSES

ACCESS SERVICES / FACILITIES

SERVICE "SWEET SPOT"

TOURISM DOMINATES

DISCREPANCY OF SALE.

HOUSING DELAY / OVER INFLATION.

UNI OF THE THIRTY AGE.

IS THERE ENOUGH?

LOW WAGES

LAND VALUES - AGRICULTURE OTHER

SOCIAL INFRA CRITICAL MASS

LARGE LAND MASS

BUS PASSES STOP AT THE BORDER

TEND TO HAVE OLDER POP

NEED TO DRIVE

THREATS

NEEDS TO BE PROTECTED

AGRIC LOW EMPLOYMENT NOS

AGRIC / BREXIT

WILL EVERYTHING GO TO THE SE?

HOW LINK? CHILDREN IN OTHER NATIONS ADAPTATIONS

DON'T CONTINUE PPL. TO STAY IN THE PAST

PROVIDING SERVICES IS MORE EXPENSIVE

HARD TO GET INFRA PAID FOR

MANAGE GROWTH WHILE MAINTAINING CULTURE

NOT JUST WAGES - PROXIMITY TO WATERS.

NAT - EU FUNDS

SUPER FERRY - DUBLIN

PLANNING LEVERS / BARRIERS

ENTERPRISE ZONES
|
HOW DEFINED
(LOOSE DEFIN)

RURAL ISSUES VARY BY LPA

→
- CAPACITY
- NEED
- OPPORTUNITY

DO WE WANT POP'N GROWTH?

DO YOU NEED PLANNING

RURAL ENTERPRISE ZONE

WEIGHT OF EVIDENCE BASE

BUSINESS SUPPORT

WAGES' BUDGET HOLE

PERMEABILITY

RURAL = SUSTAINABLE

IT'S A TRADE OFF - ECON V ENV

S4 + S9
IMP OF DIVERSIFICATION + LANGUAGE

TANG REUAMP?

PRIORITIES

PPL IN THE 'MIDDLE'

CONSERVE THE SETTING AS WELL AS THE ASSET

WHAT IS OUR APPROACH TO ...

WHERE ARE OUR BUSINESSES SELLING TO?

MAPPING ISSUES - FOR COMMONALITY

ENVIRONMENTAL

WEAKNESSES

mounting

ng.

and
t.

Suitability
of rural areas
for current EV
infrastructure

tourist in
→ congest

rel
pr

Grid

STRENGTHS

Tourism opportunities → not in self-catering!

Resource Rich.

tourism contribution to the economy

marine environment.

Built Heritage

OPPORTUNITIES

Circular economy - using waste to benefit.

Tourism tax → for benefit of local area

offshore renewable energy

Housing

Reservoirs for as an attraction.

Balancing renewable energy generation w/ landscape.

Community energy generation.

Linking in to energy infrastructure + creating apps for it.

tourism opps. linked to lifestyle

outdoor activities / adventure. Unique products not just accommodation.

tourism + heritage. environmentally friendly travel.

reconsideration of transport infrastructure for long distance travel.

Major Events - showing off environment.

Car sharing - needs parking infrastructure.

ENVIRONMENTAL

WEAKNESSES

Uncertainty surrounding future of farming.

↳ knock on effects to land management.

Capacity issues w/in tourism.

Public Transport

Accessibility

tourist 'hot spots'
→ congestion + landscape impact.

Suitability of rural areas for current EV infrastructure

reliance on the private car.

Grid connecting

water pollution.

THREATS

Industrialisation of farming.

↳ Pollution, slurry + environmental impact.

future of agriculture vs. impact on environment.

Misconceptions of farming / agriculture operations - land based farming vs. wider activities
extracting resources for urban areas

Loss of sheep farming
→ impact on uplands vegetation
water pollution

Fishing

rural areas getting left behind on EV.
- often based on density of population etc.

policy only applicable to designated areas
→ protection of other areas

Air pollution
carbon impact of farming

limitations of the grid - who pays to keep it in operation?

PLANNING LEVERS / BARRIERS

agriculture/farming PD.

'Valuing' the environment
Policy vs. practice.

Knowing the facts - finding the balance.

Benefits from policies →
local areas.

Subsidies. - impact
of subsidisation.

Incentivisation needed
too for people to take
ideas e.g. circular
economy seriously.

Strong environment =
more enviro. assessment.

Policy

Limitations of the
planning system to solve
all problems.

Strategic level planning
for electricity infrastructure

PRIORITIES

Rural Wales for everyone.

Economic growth vs. protection.

'Finding the balance

Who benefits?

Electric car
infrastructure.

Innovation v. protection.
↳ prioritisation

planning for different
areas / different types
of farming activities.

Balance between developing
rural areas + preventing
isolation / inaccessibility.

Grid connectivity &
energy infrastructure -
national level.

SOCIO-CULTURAL
WEAKNESSES

DISTANCE
TO
WORK
~~TRAVEL~~

RETAIL
INFRASTRUCTURE
+
ROUTING

MENTAL
HEALTH
- R

LOSS OF
CHAPELS
FOR
SENSE OF
COMMUNITY

SERVICE
ACCESS/
PROVISION

WAYS
LEVEL
2016

EMPLOYMENT

COMMUTER,
HUBS

TS

COMMUNITY
COHESION
MENTAL
HEALTH

LOSS OF
YOUNGER
PEOPLE
(24-30)

STRENGTHS

EARLY RETIREMENT (SS+)
AS ASSET TO COMMUNITIES

ABILITY TO GET THINGS DONE - RESPONSIVENESS

CULTURAL IDENTITY
WELSH LANGUAGE

STRONG NETWORKS IN EXISTING/CONVULSED COMMUNITIES

LIFESTYLE

YOUNG / FARMERS MOVEMENT / GROUP

TIME TO REFLECT & MAKE DECISIONS (MAYBE PARTIAL)

TOURISM

OPPORTUNITIES

COMMUNITY CASE BASED STUDIES

RESOURCE & EARLY RETIRED COMMUNITY

COMMUNITY BASED RENEWABLE SCHEMES

SM & BUSINESS HUBS

TECHNOLOGY & TRANSPORT OPPORTUNITIES

EDUCATION OPPORTUNITIES ACCESS

SCIENCE MODERNISATION - CLOSURE OF COMMUNITY SCHOOLS

SOCIAL INNOVATION / ENTREPRENEURSHIP

BUSINESS MENTORSHIP

IMPROVING DIGITAL ACCESSIBILITY

ADAPTATION OF SERVICE PROVISION / COVERAGE

LOCALISED ENERGY GENERATION

TOURISM TAX

PLACE - PLANNING SUSTAINABLE COMMUNITIES

5G

ENTHUSIASTIC SERVICES SPACE

PROVISION OF A NEW TOURISM OFFER

FLEXIBLE WORKING OR FUTURE

WORK FROM HOME

INFLATION / HEALTH IMPLICATIONS

SOCIO-CULTURAL WEAKNESSES

LIMIT
GET
US
SENSITIVENESS

STYLE

NE TO
SELECT &
MAKE
DECISIONS
(policy maker)

RESOURCE
LY
TIRED
COMMUNITY

IMPROVING
DIGITAL
ACCESSIBILITY

76

WORK
FROM
HOME

ISOLATION/
HEALTH
IMPLICATIONS

PATTERNS
OF TRAVEL
TO SCHOOL
- WELLBEING
HEALTH IMPACT

EMPLOYMENT
OPPORTUNITIES
EQUALITY

SCHOOL
MODERNISATION
- CLOSURE
of
COMMUNITY
SCHOOLS

ADAPTATION
OF
SERVICE
PROVISION/
COVERAGE

BREXIT
- IRISH
POINTS &
CONNECTION WITH
EUROPE

LOSS OF
CHAPELS
FOR
SENSE OF
COMMUNITY

COMMUTER,
'HUBS'
OVER
COMMUNITIES

SERVICE
ACCESS/
PROVISION

COMMUNITY
COHESION
- HEALTH
IMPAIRS

FUEL
PRICES ON
RURAL
ECONOMY.

LOSS OF
YOUNG
PEOPLE
(24-30s).

SOCIAL
CARE FOR
ELDERLY

16+
ACCESS
TO SERVICES

RAIL
INFRASTRUCTURE
ROUTING

DISTANCE
TO
WORK
TRAVEL

MENTAL
HEALTH
- FARMING

TS

PLANNING LEVERS / BARRIERS

SUPPORT FOR LOCAL
OBJECTIVES
OR ENERGY

~~LOCAL~~
TAXATION
INCENTIVES
&
PLANNING

LAND
ALLOCATION
FOR COMMUNITY
FACILITIES
& SUSTAINABLE
RENEWABLES

PLACE
PLANNING
SUSTAINING
COMMUNITIES

EDUCATION
STRATEGY &
TRANSPORT
PLANS
- MORE FARMERS

~~SPACE~~
PLACE PLANS
TO FOCUS
ON PLACE
FOR RENEWABLE
ENERGIES

COMMUNITY
FACILITIES

PRIORITIES

KEEP
VILLAGE
HALLS OPEN
- CENTRE OF
ACTIVITIES

FOCUS
RETENTION
ON SINGULAR
FACILITIES

HOUSING
STOCK /
TYPOGRAPHY

OFFER
OR HOUSING
CHOICES
FOR ELDERLY
TO AVOID
ISOLATION

INVESTMENT
SUPPORT
↓
DEVELOPMENT

LINKAGES
TO
TOWNS /
URBAN
CENTRES

IMPACTS OF
TRAVEL
TO
SCHOOL -
RURAL
AREAS

FLEX.
DEVELOPMENT

STRATEGIC
SUPPORT
FOR LOCAL
SERVICES

" CREATE
LIVABILITY"
↓
CREATE
SUSTAINABLE
COMMUNITIES

INNOVATIVE
SCHEMES
IN
RURAL
AREAS

Appendix D

Mid & South West Wales Rural – Event Register

National Development Framework: Research into Regions and Rural Areas (Mid and West Wales Region)

Location: The Plough, Llandeilo

Date: 30th November 2018

Regional Workshop – 10:00 – 12:30pm

Name	Organisation	Also attending Rural workshop (✓)
1 Craig Mitchell.	WLGFA	✓
2 Martina Punne.	Pembrokeshire Coast.	✓
3 Gail Hister.	" "	✓
4 Carl Comerford	Neath Port Talbot Council	✓
5 Jonathon Scott	NRW	✓
6 Geoffrey Sibelair	CPRW	✓
7 Sean Lloyd	Fire Service	✓
8 Rhion Phillips	Carmarthenshire Council	✓
9 Peter Morris	Pemys Council	✓
10 Kate Harrison	Perrisymmer Homes	✓
11 Rhodri Evans	Ceredigion Council	✓
12 Huwel Manly	NRW.	✓
13 Geraint Roberts	mid wales housing	✓
14 Ian Hewelwyn.	Carmarthenshire Council	✓
15 Naomi Davies	Brecon Beacons NPA	✓
16 Phil Williams	Future Generations Commission	✓
17 Helen Lucy	Brecon Beacons NPA.	✓
18 Jesse Heley	Aberystwyth Uni	✓
19 Bryony	Aberystwyth Uni	✓
20 Cate Ranson	Ceredigion Council.	✓

A factual, bilingual and anonymised Workshop Report will be produced to record the events.
Some photographs may be taken of this event.
Should you have any concerns, please contact a member of the project team.

21	Wyn Thomas.	Pafodolier iaith.	✓
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National Development Framework: Research into Regions and Rural Areas (Mid and West Wales Region)

Location: The Plough, Llandeilo

Date: 30th November 2018

Rural Workshop – 1.30 – 4:00pm

Name	Organisation	
1	MIKE ELLERY/	ANEURIN BEVAN H/BOARDS.
2	IAN SANDFORD	WFD
3	DAVID JAMES	MONMOUTHSHIRE H.A.
4	Rachel Jones	Carmarthenshire C.C.
5	ADRIAN	WALES TOWNSHIPS ALLIANCE
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A factual, bilingual and anonymised Workshop Report will be produced to record the events.

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Should you have any concerns, please contact a member of the project team.