

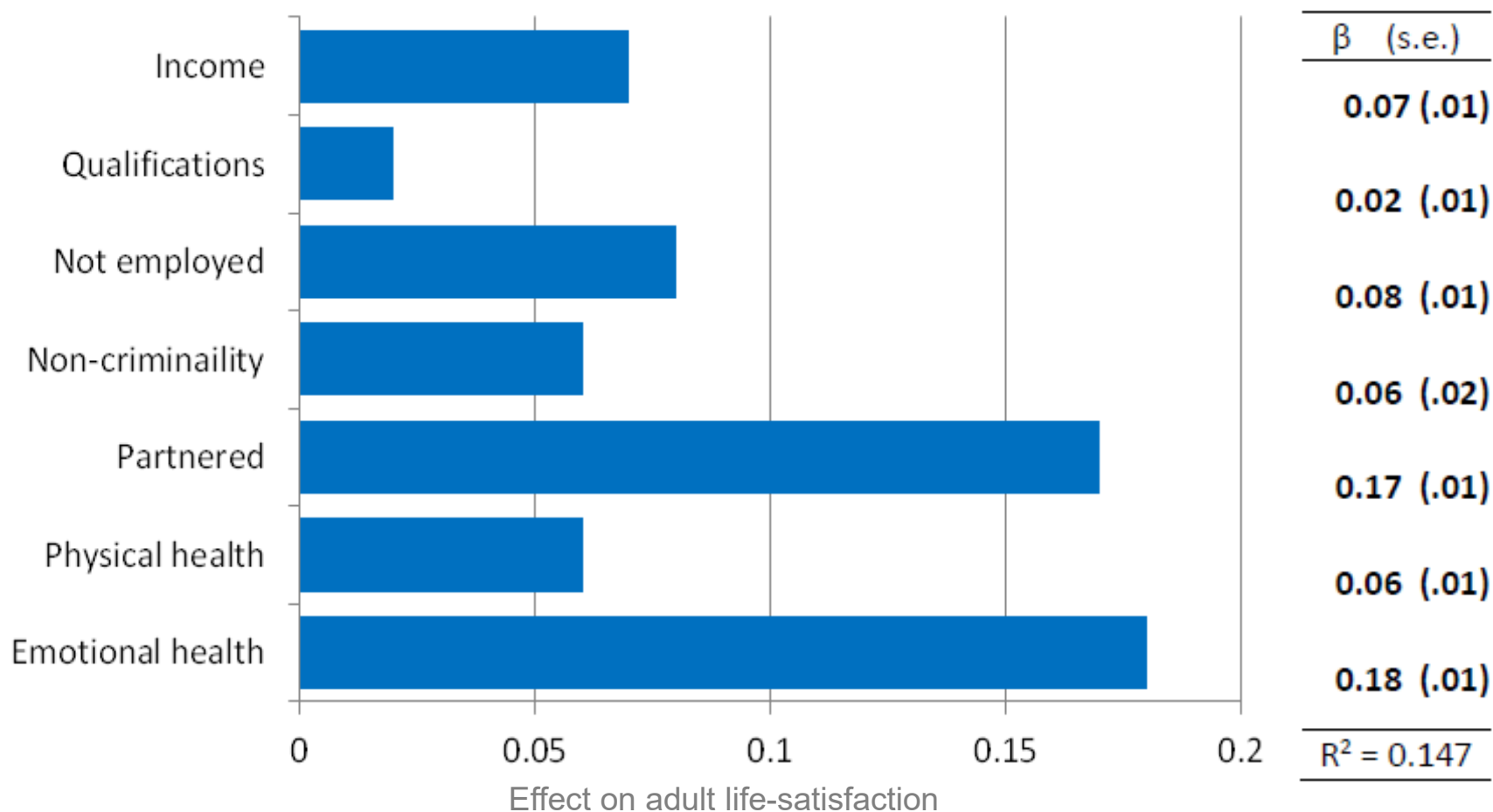
Welsh Government Future Trends Report 2017 – Society & Culture Theme data slides

The following slides provide background data
and graphs used for the Culture theme in the
Future Trends Report 2017

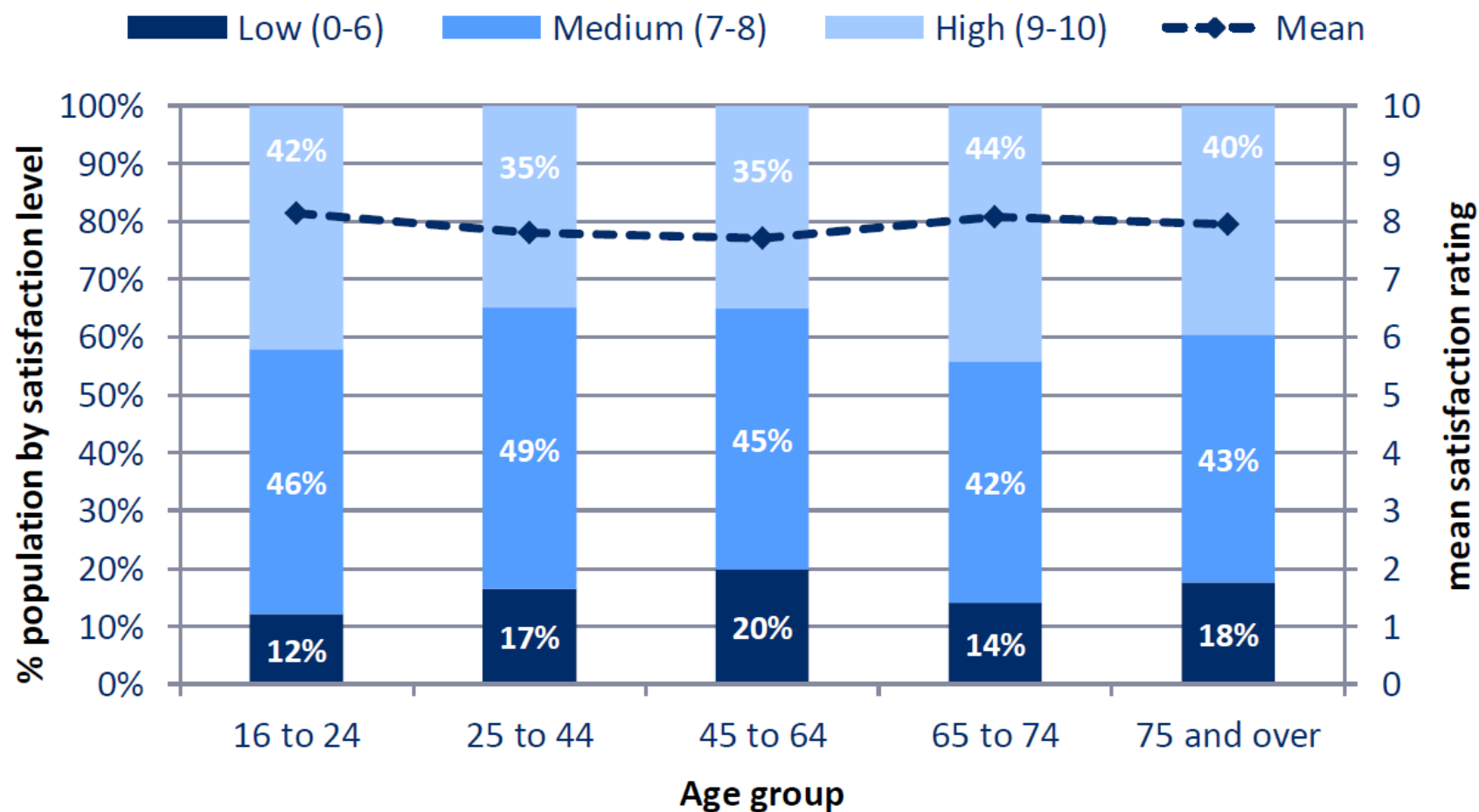
Factors that influence well-being

- Well-being increasingly seen as an over-arching outcome for public services
- Diverse and growing evidence base but reasonable agreement internationally on the important factors
- Inequalities in well-being are driven by a range of personal characteristics, social factors and economic factors.

Longitudinal studies highlight the importance of good mental health, personal relationships, employment and income

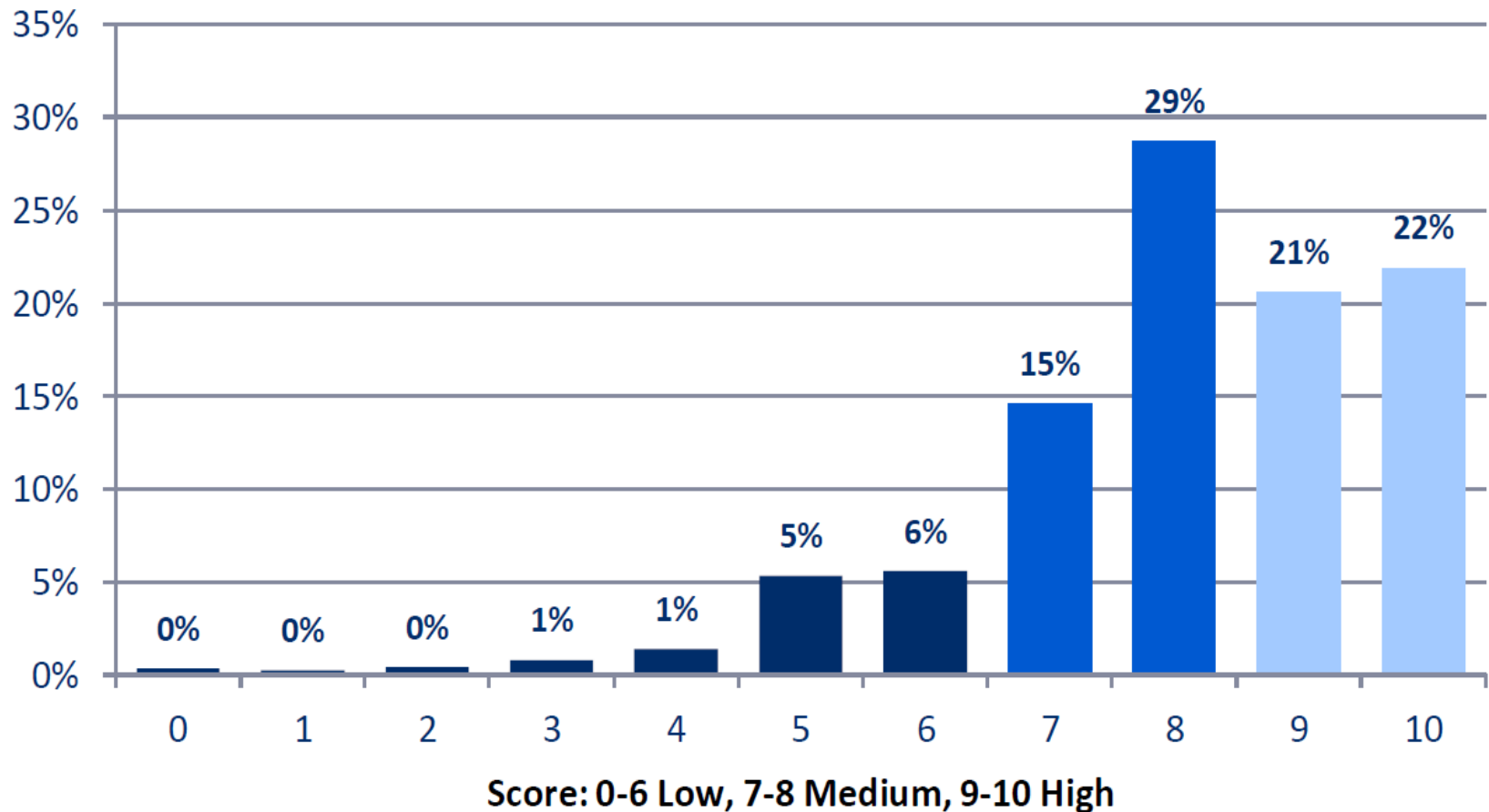


In Wales 83 per cent of people were satisfied with their lives in 2014/15, with variations across age-groups, in line with other evidence



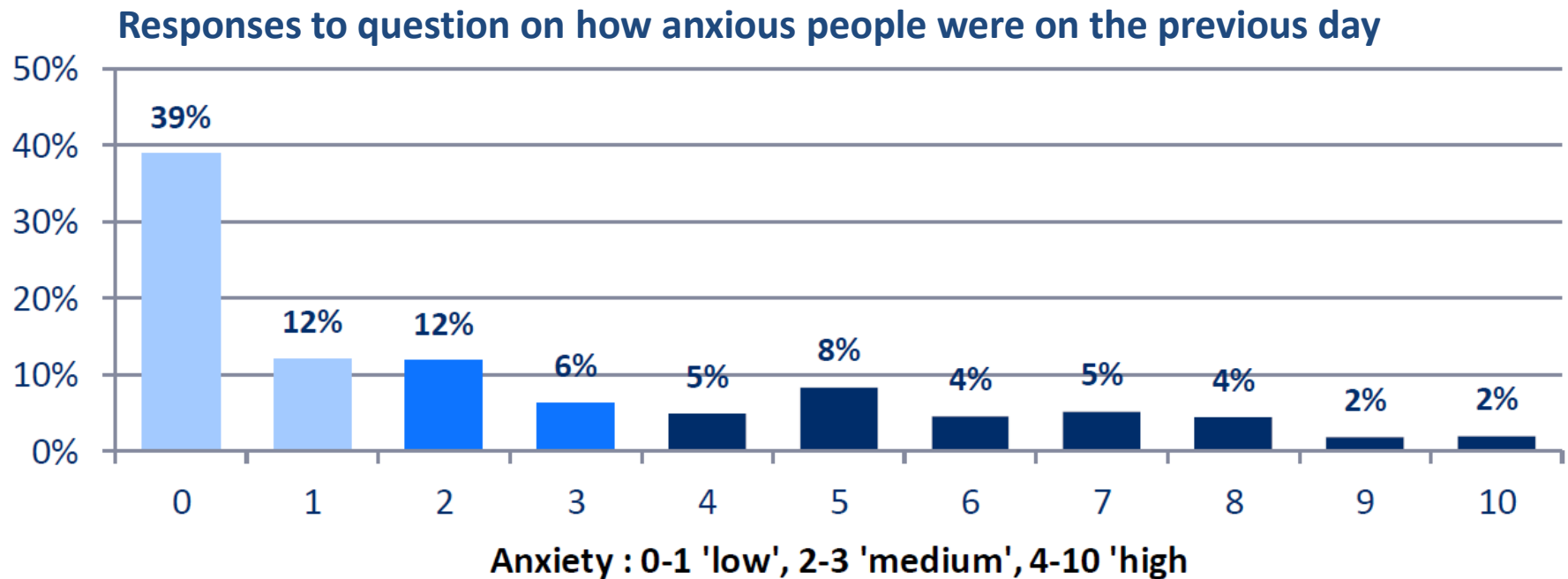
People feeling the things they do in their lives are worthwhile is important for well-being. On a scale of 0-10, the average score in Wales was 8.1 in 2013/14

Extent of feeling that things done in life are worthwhile



For the emotional side of well-being, feelings of happiness and anxiety are important measures

- In relation to how happy people felt on the previous day, the average rating was 7.7, on a scale of 0-10, in 2014/15 .
- In relation to how anxious people felt on the previous day, 51 per cent stated low levels of anxiety.



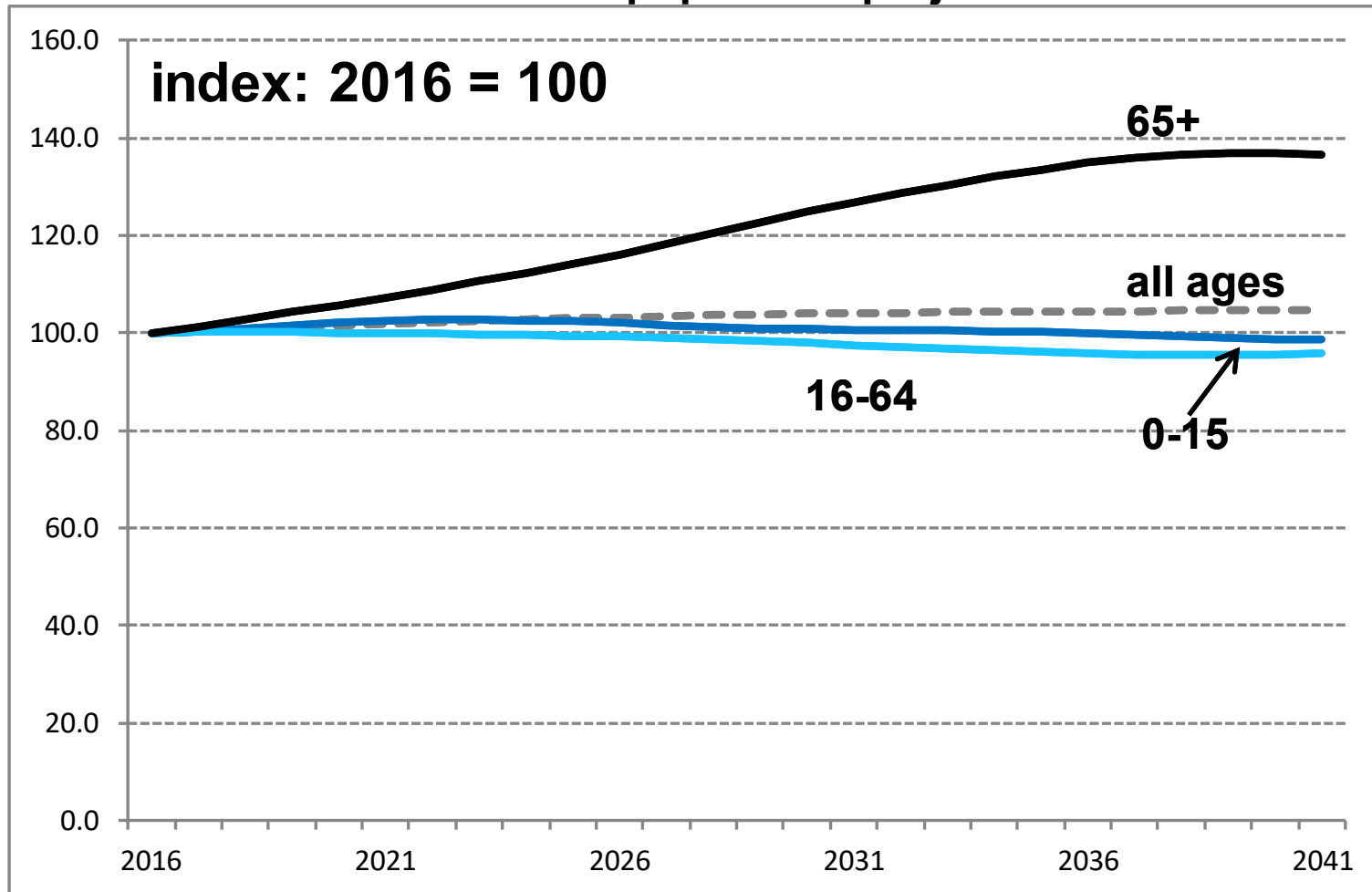
Some areas in Wales have the highest inequalities in well-being

Ten most equal				Ten most unequal		
	Local authority	Mean Standard Deviation	Average of 4 ONS questions	Local authority	Mean Standard Deviation	Average of 4 ONS questions
1	Enfield	1.8	7.62	Blaenau Gwent	2.5	7.24
2	Cheshire East	1.8	7.74	Liverpool	2.4	7.11
3	Harrow	1.8	7.49	Neath Port Talbot	2.4	7.36
4	Eilean Siar, Orkney & Shetland	1.8	8.05	Merthyr Tydfil	2.4	7.26
5	Warwickshire	1.9	7.75	Knowsley	2.4	7.13
6	Wokingham	1.9	7.66	Sunderland	2.4	7.36
7	Falkirk	1.9	7.68	Rotherham	2.4	7.30
8	Lambeth	1.9	7.33	Kingston Upon Hull	2.4	7.34
9	Aberdeenshire	1.9	7.76	Inverclyde	2.4	7.33
10	Barnet	1.9	7.67	North Ayrshire	2.3	7.29

Table 1: Ten most unequal and most equal local authorities in 2014-15, based on average standard deviation of four wellbeing questions 14

And an ageing population poses societal challenges in terms of individual well-being and what it means for communities and public services.

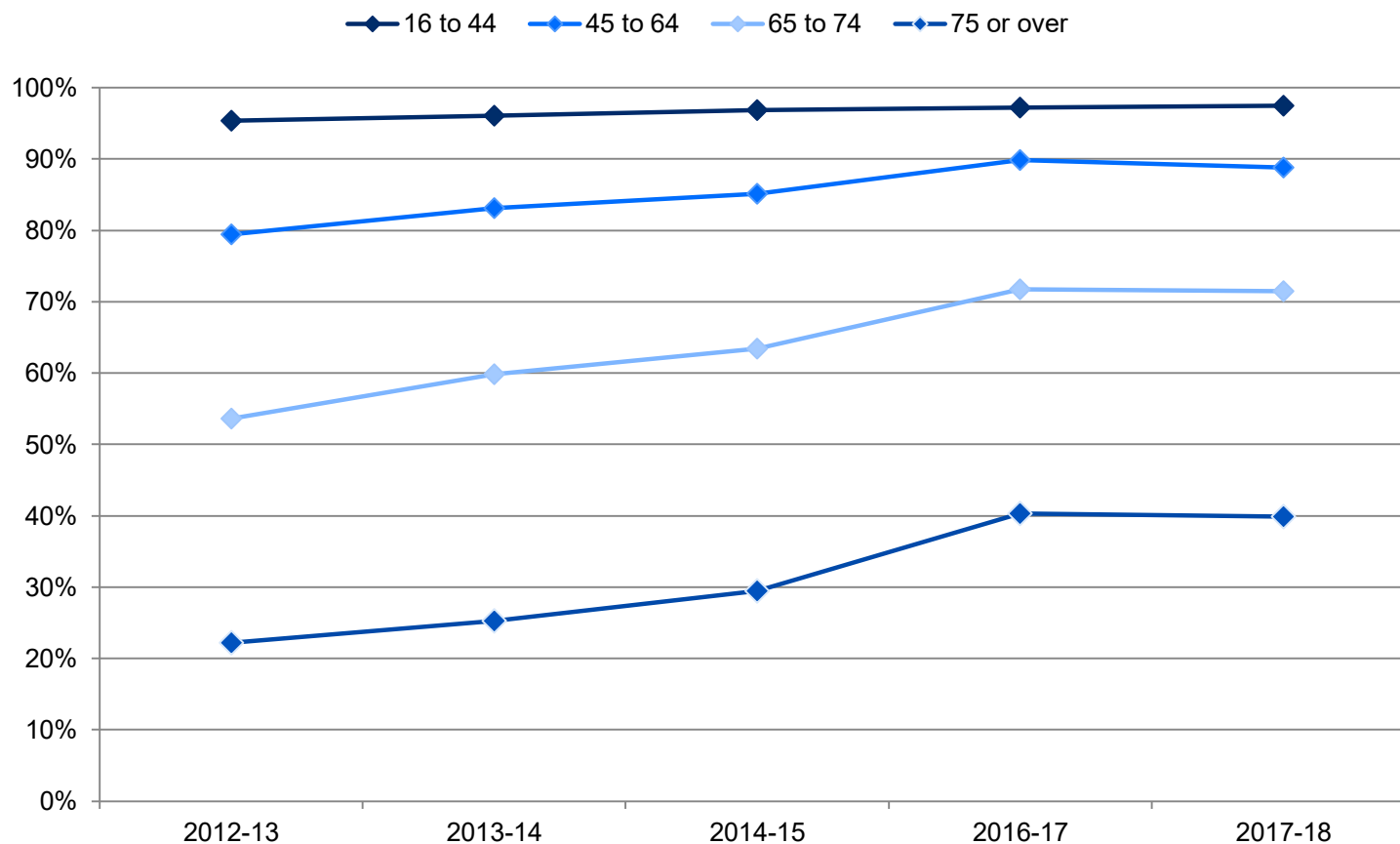
Wales: national population projections



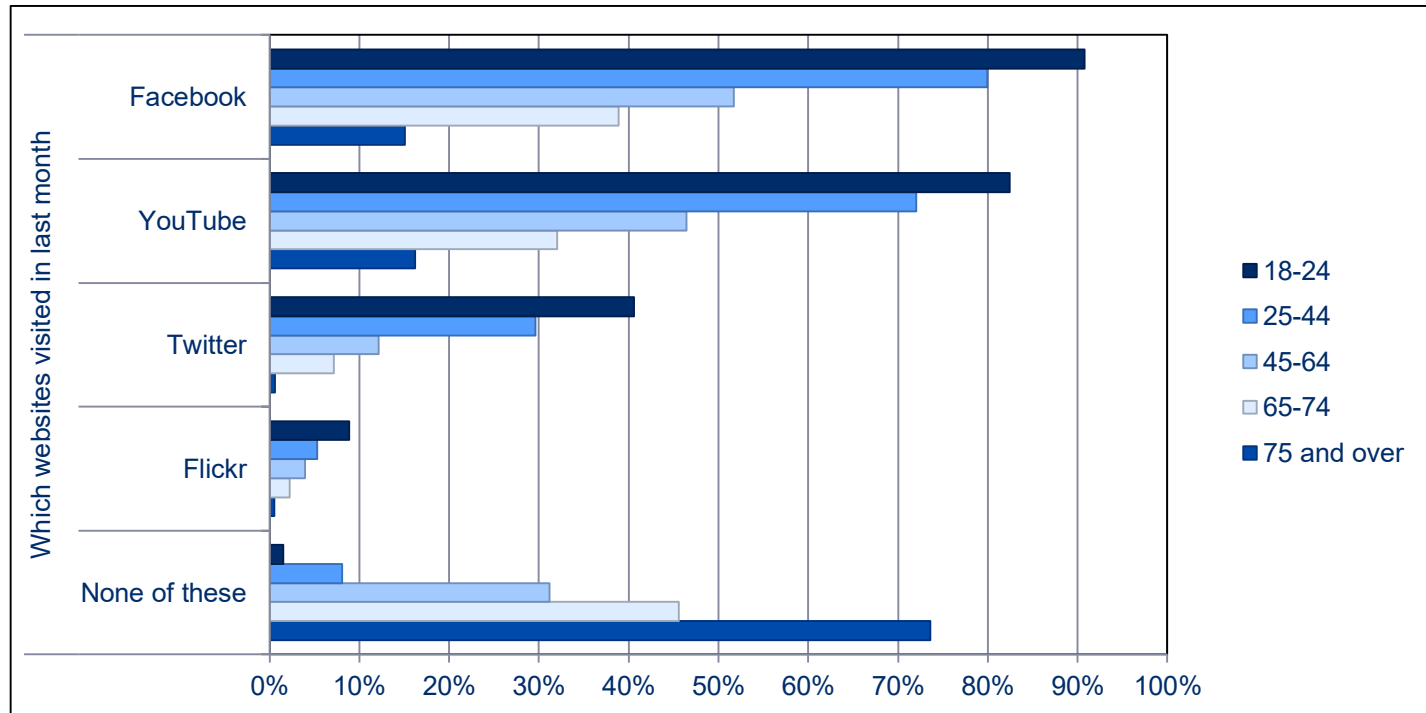
Source: StatsWales

Use of the internet increased across all age groups from 2012 to 2017 and remained constant in 2018. There is still significantly lower usage amongst older age groups.

Personal Internet use, 2012 to 2018



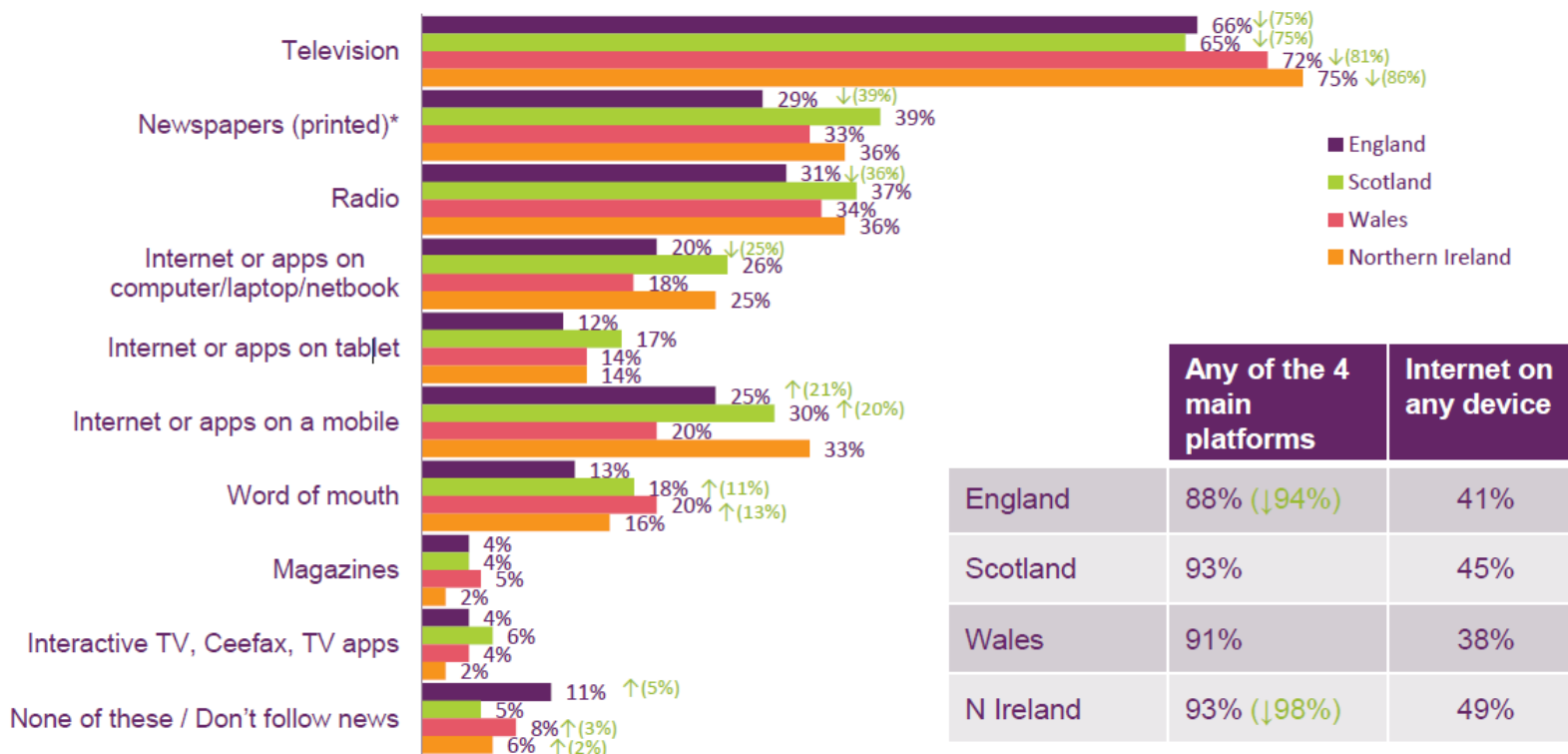
Social networks are increasingly important, particularly for young people



And people are more likely than ever to be receiving their news through less traditional platforms

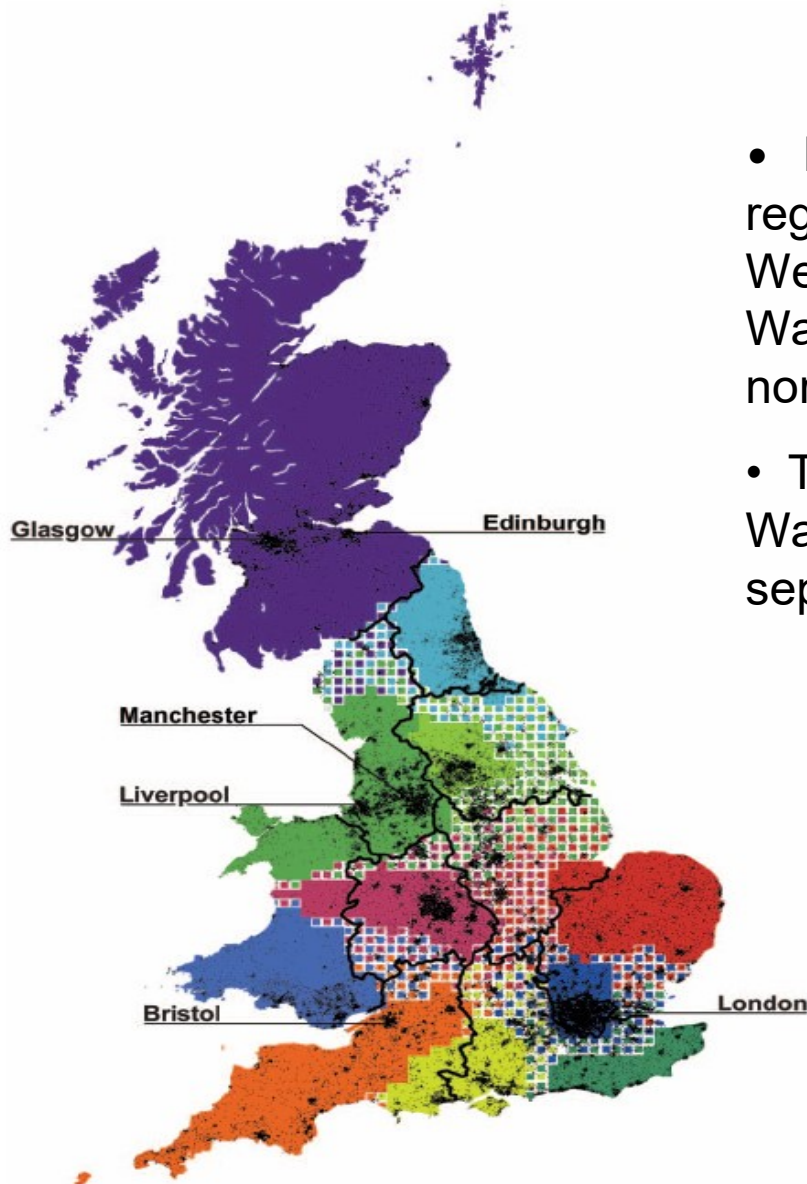
Platforms used for news 'nowadays', by nation

The use of TV for news has decreased across the UK as a whole, while using mobiles for news has increased in England and Scotland and word of mouth has increased in Scotland and Wales.



Brackets in green indicate differences of statistical significance between 2014 and 2015

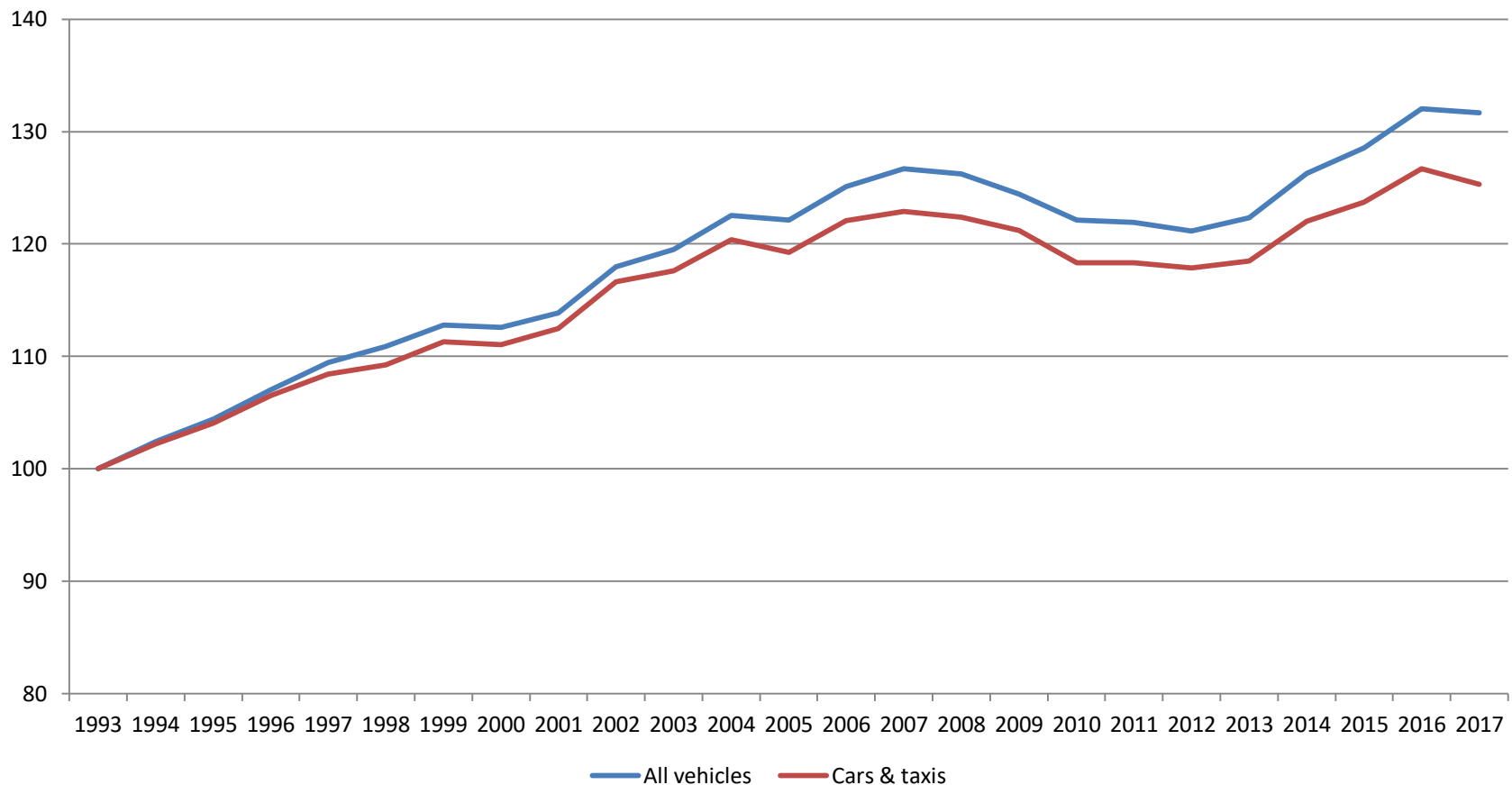
Patterns of phone calls show Wales is much more linked in to England than Scotland:



- Parts of Wales are closely linked into regions dominated by the major cities of the West Midlands and North West (and “South Wales” incorporates part of Gloucestershire north of the Severn).
- The difference between Scotland and Wales is striking, with Scotland very separated from the rest of Great Britain.

No real sign of growth in road use stalling across Wales prior to recession; traffic peaked in 2008, before falling back and then recovering.

Road traffic, Wales, 1993=100



Note: decline for Wales in 2017 is provisional and reflects a reduction only on minor roads where data is volatile

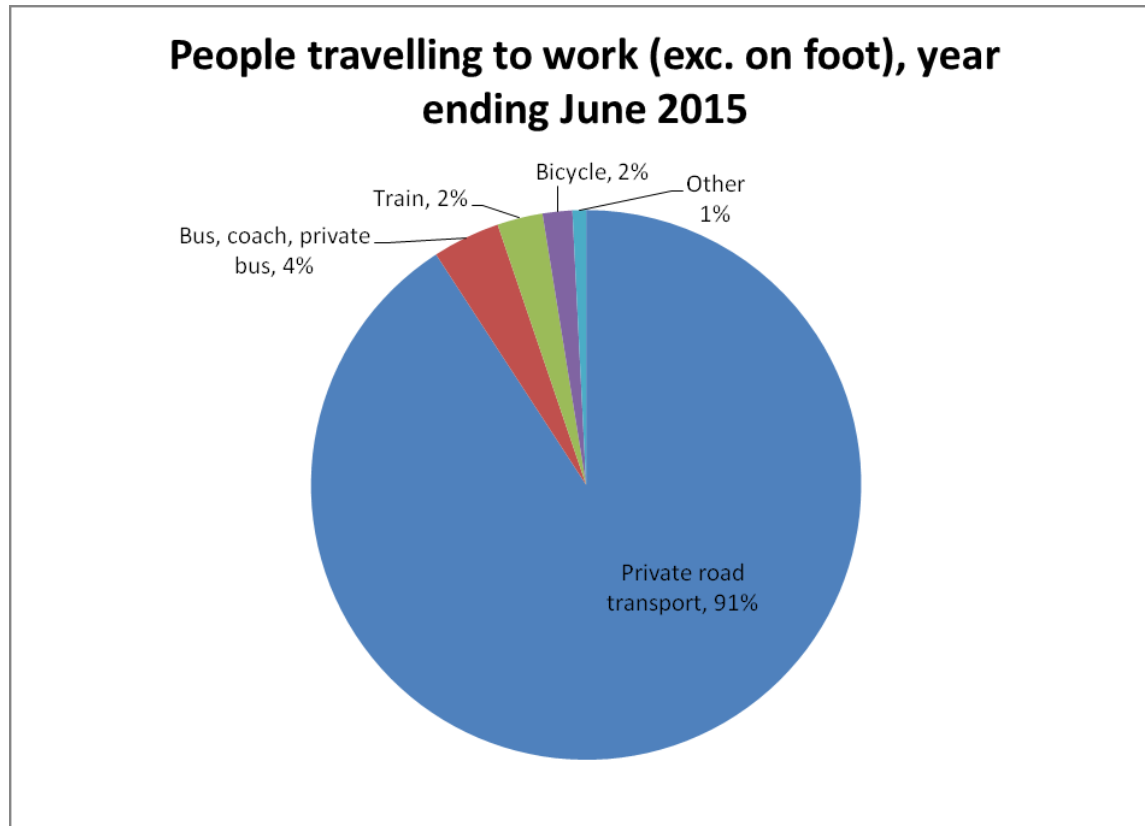
Key uncertainties for the future: Uber; home working; home delivery of goods and services; (semi) autonomous vehicles; zero emission vehicles

Source: Department for Transport

Traffic growth continued

- Growth in traffic in Wales has been rather higher than much of the rest of UK
- Within Wales, Cardiff had the slowest growth in traffic.
- Car ownership level in Wales is typical amongst UK countries and regions.
- The development of autonomous, semi-autonomous and low carbon vehicles could affect vehicle use in ways that are difficult to predict.

Private transport is the dominant mode in Wales (as elsewhere):

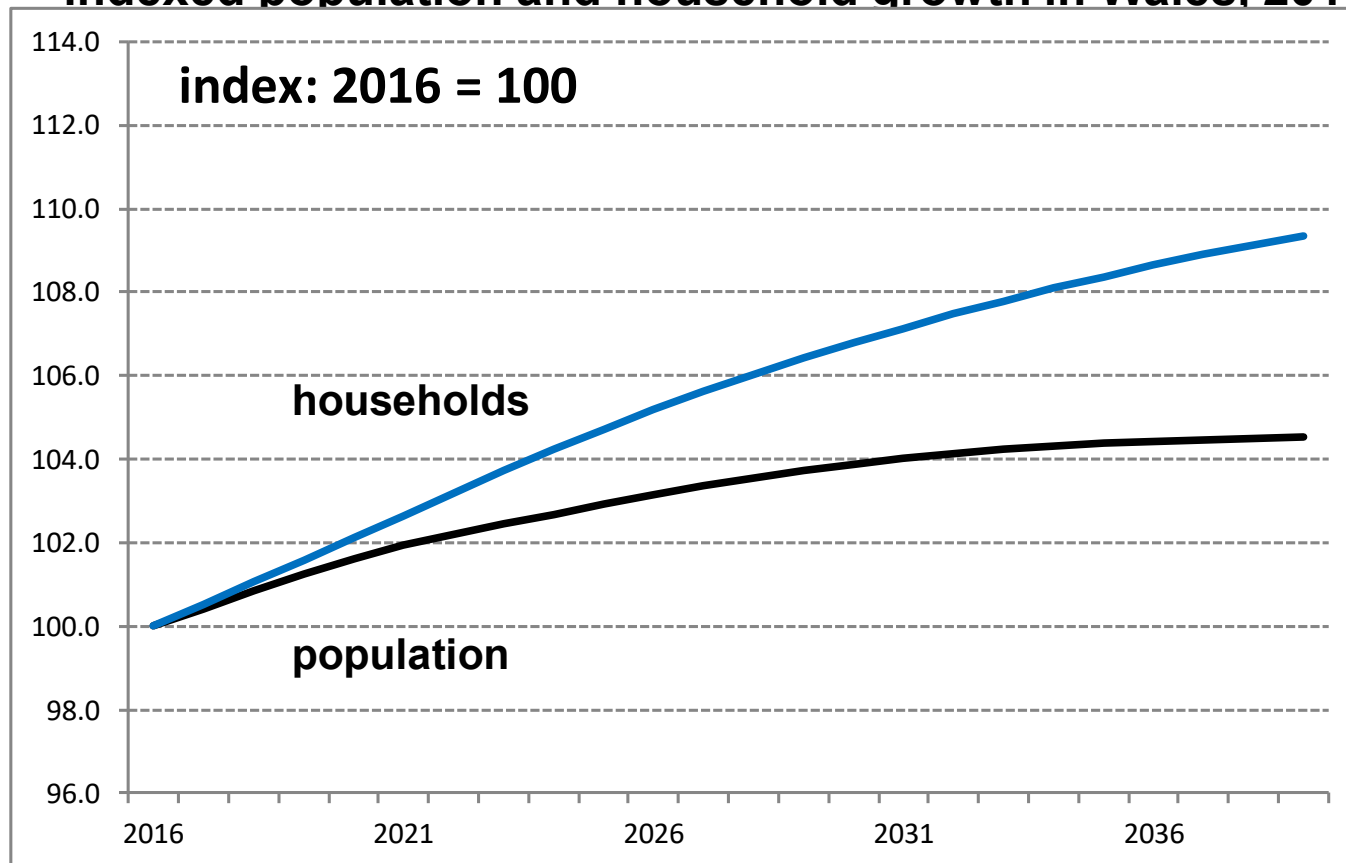


- Private transport use tends to be higher in less densely populated areas
- Studies suggest that public transport improvements alone achieve only limited modal shift

Demographic change will influence housing demand, particularly when combined with changes in household composition.

In Wales the number of households is projected (2014-based) to grow faster than the population between 2016 and 2039.

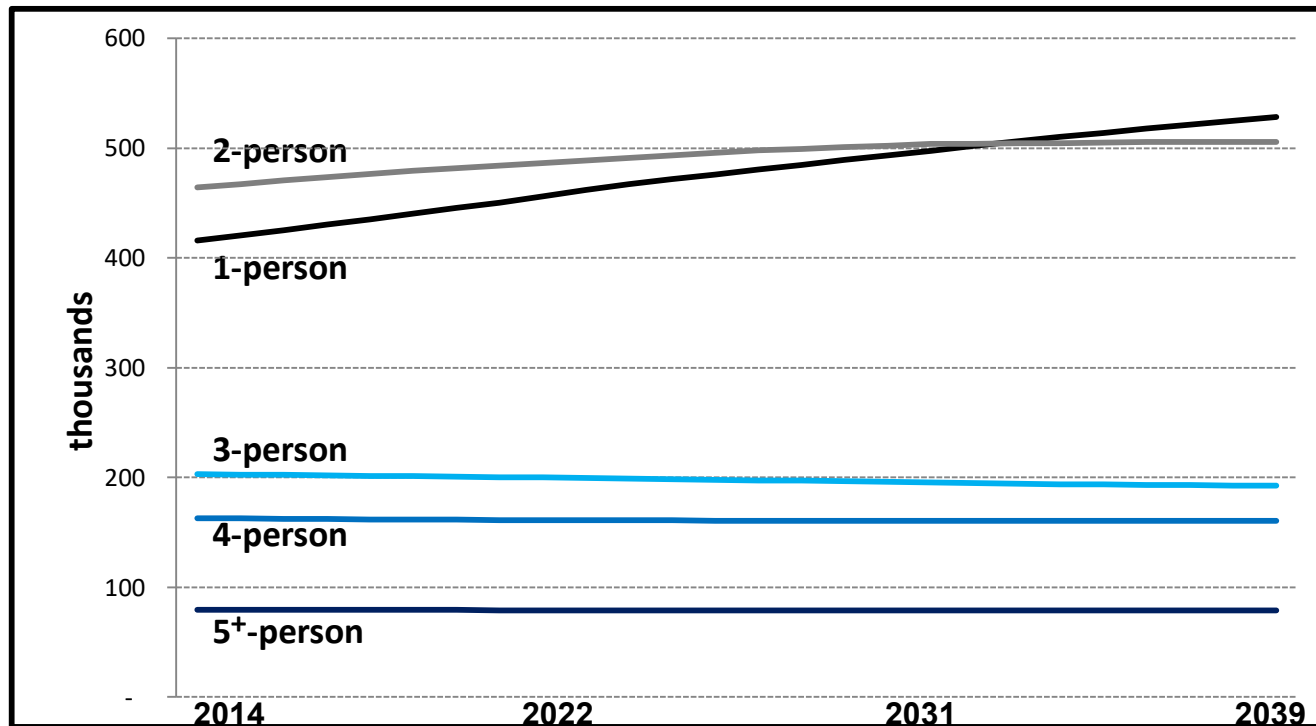
indexed population and household growth in Wales, 2016-2039



Source: StatsWales

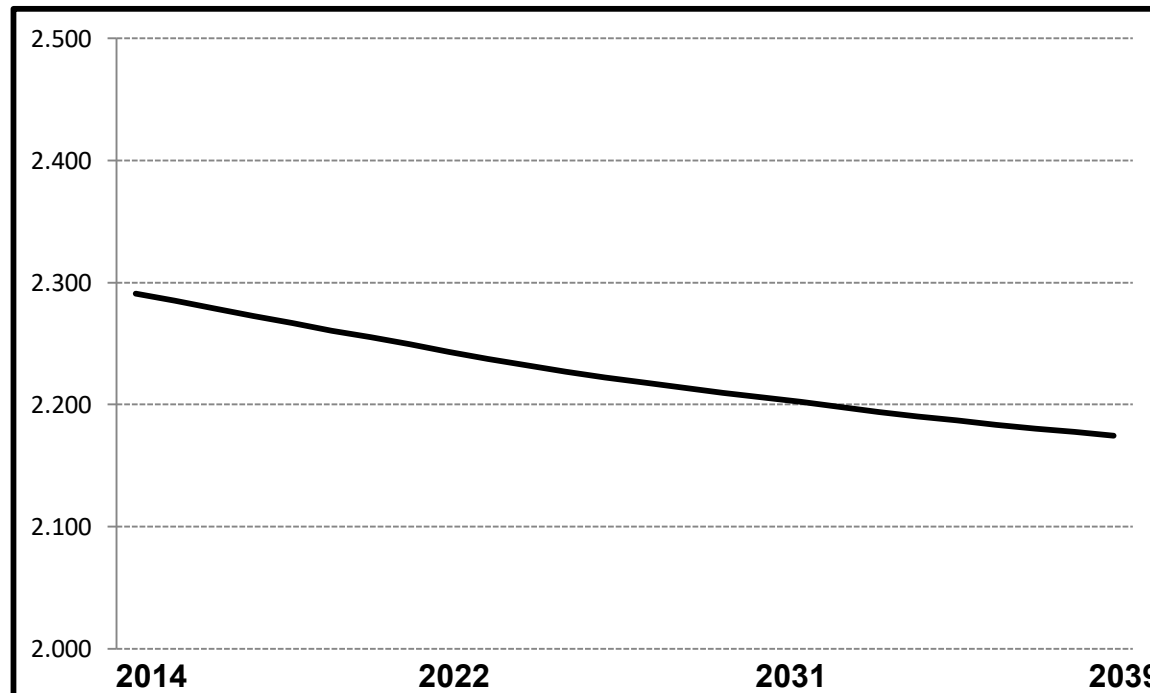
The number of 1-person households is projected to increase more than (and overtake) the number of 2-person households

projected numbers of households in Wales (by type), 2014-2039



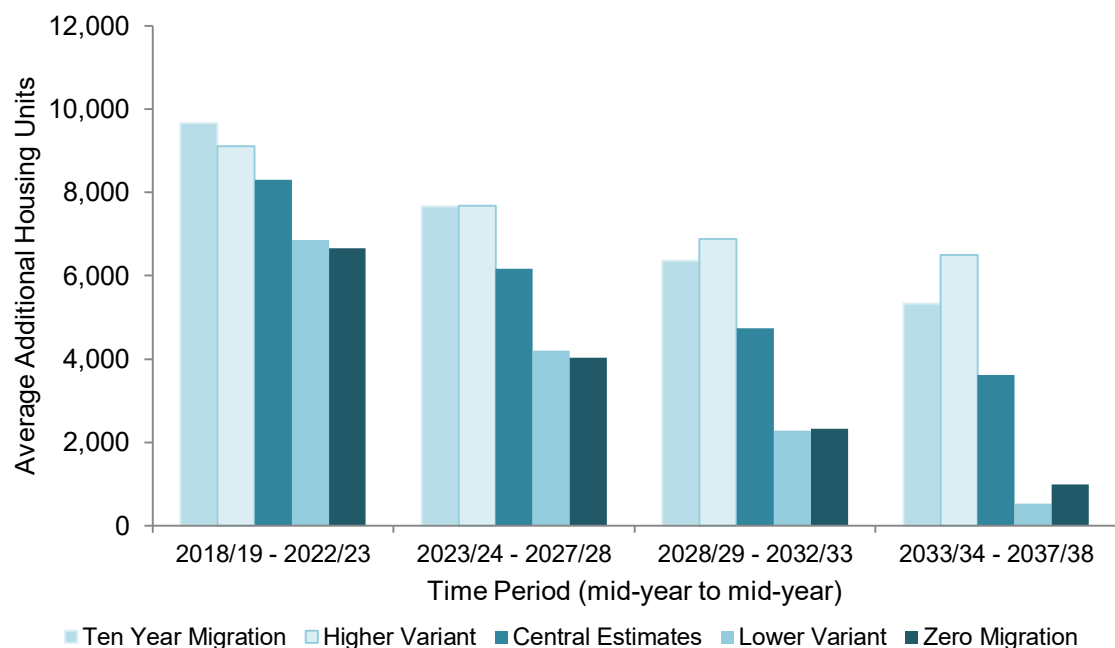
And as a result the average household size is projected (2014-based) to decrease steadily between 2014 and 2039.

projected average household size in Wales, 2014-2039



Central estimates of housing need show we need an average of 8,300 houses each year for the next five years (until 2022/23)

Average annual estimates of additional housing need (Wales)

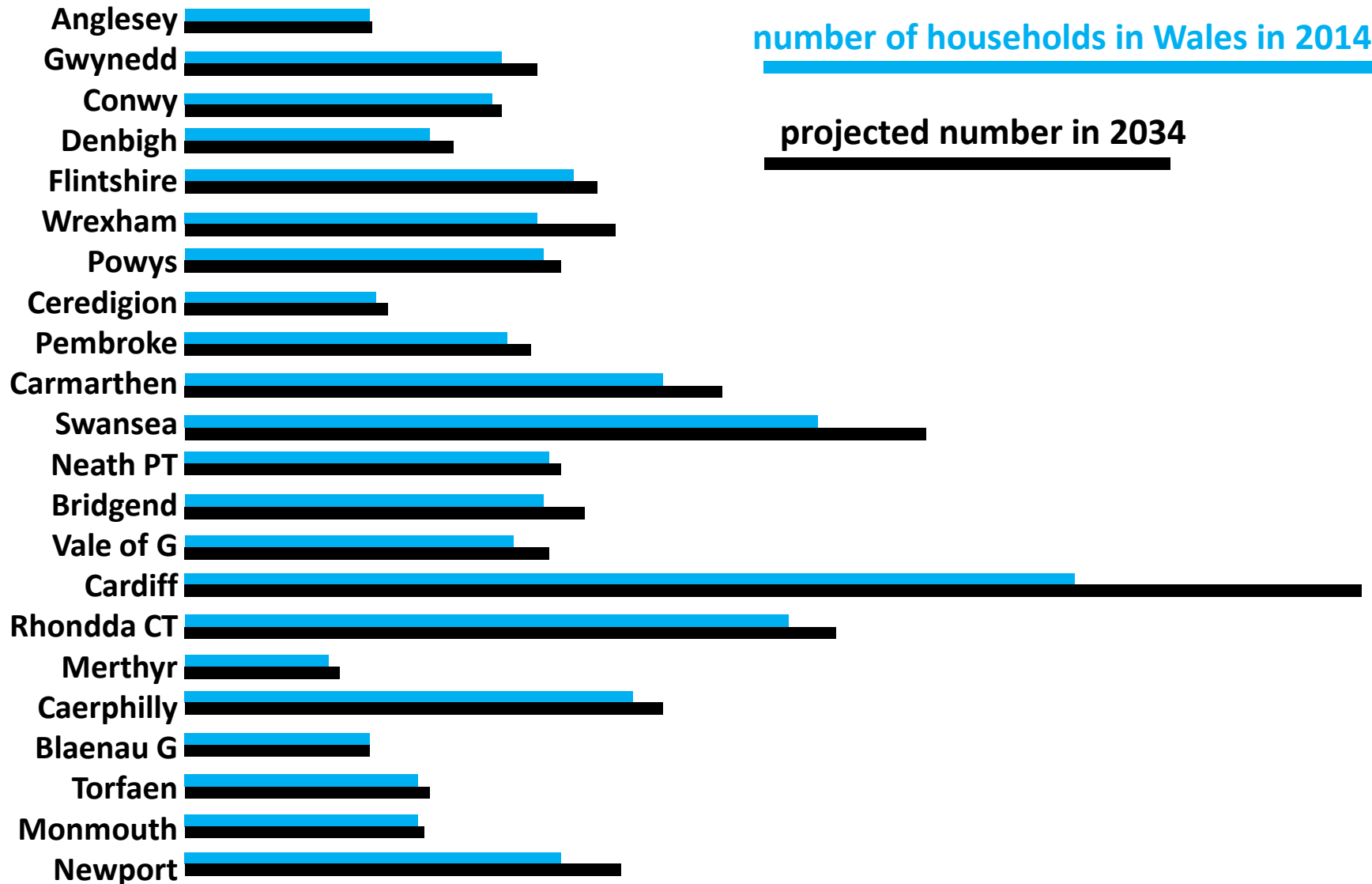


Sources: WG 2014-based household projections , Homeless Households in Temporary accommodation, 2011 census

It is estimated that on average, between 6,700 and 9,700 additional housing units will be required annually during the first 5 years with a central estimate of 8,300 (central estimates of housing need are calculated from 2014-based principal household projections).

By the mid 2030s, it is estimated that up to 6,500 additional housing units will be required annually (with a central estimate of below 4,000). This reflects the growth in 2014-based household projections.

Growth in household projections are not uniform across Wales

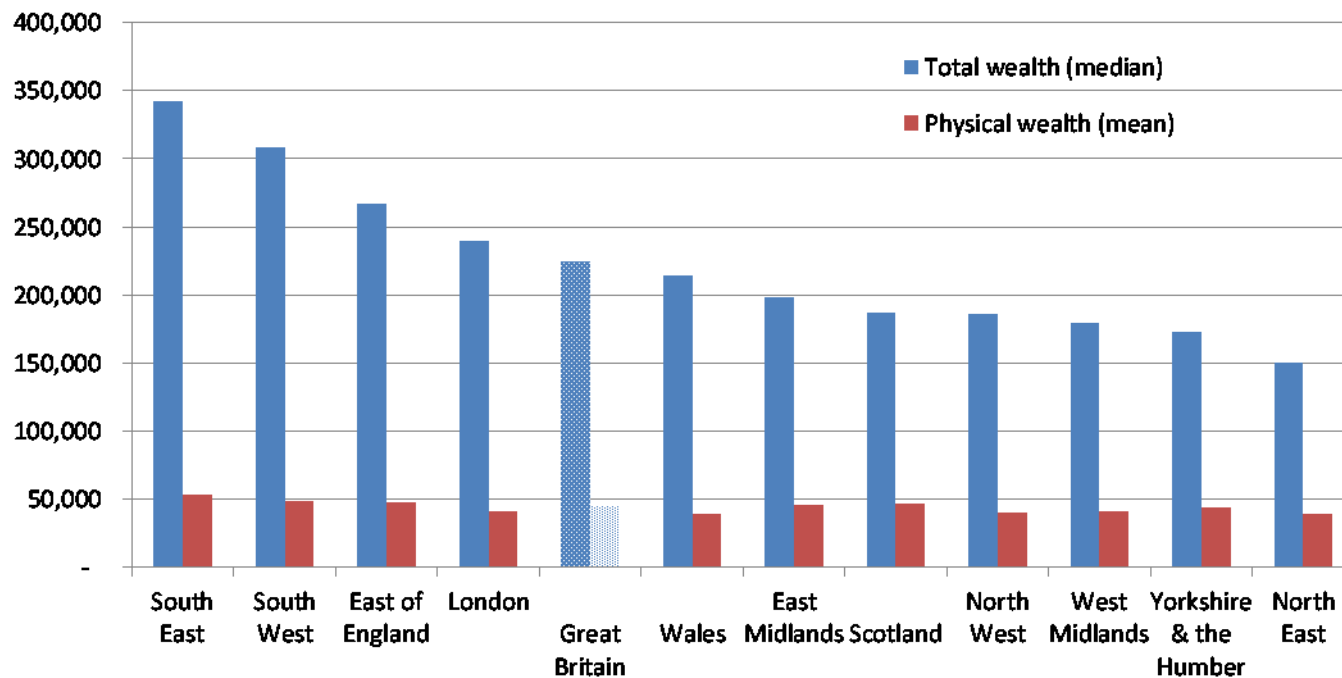


Percentage increase in the projected number of households (2014-2024)

- 32% for Cardiff
- 21% for Wrexham
- 17% for Newport and Swansea
- 11% for Carmarthenshire, Bridgend and the Vale of Glamorgan
- 5-10% for Gwynedd, Denbighshire, Rhondda Cynon Taf, Ceredigion, Pembrokeshire, Merthyr Tydfil, Powys, Caerphilly and Flintshire
- 1-5% for Torfaen, Neath Port Talbot, Monmouthshire, Conwy and Isle of Anglesey
- No change for Blaenau Gwent

Wealth in Wales is similar to the rest of the GB and higher than most areas outside the South of England

Regional distribution of total and physical wealth, 2012-14



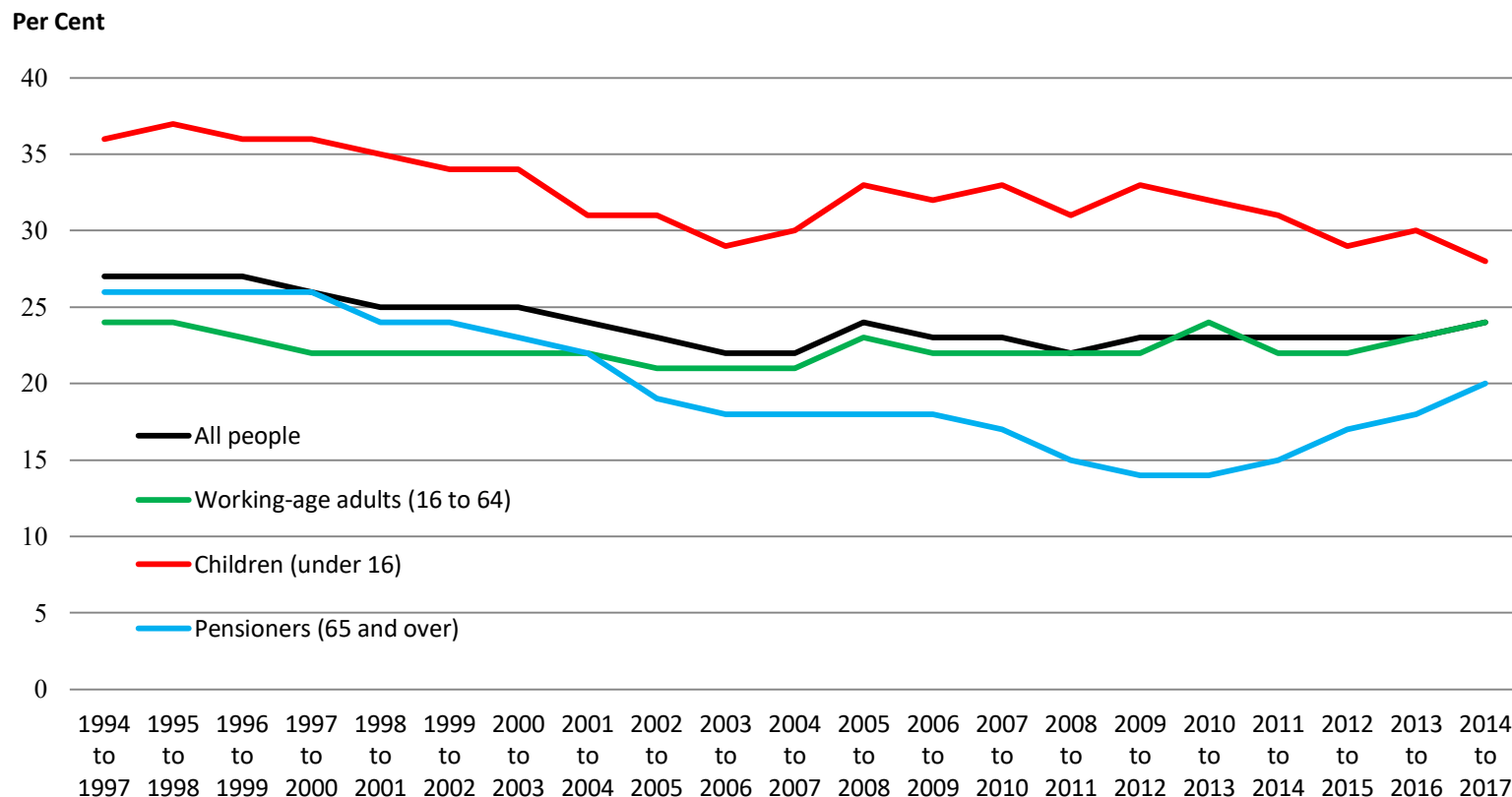
As people get richer, patterns of expenditure change in predictable ways

		<div> <div></div> <div>Spending tends to increase slower than income (slower increase, darker shade)</div> </div> <div> <div></div> <div>Spending tends to increase similarly to income</div> </div> <div> <div></div> <div>Spending tends to increase faster than income (faster increase, darker shade)</div> </div>			
Basic food	Bread, vegetables, meat etc				
Discretionary food and drink	Alcohol, tea, coffee, tobacco				
Personal property and services	Clothing				
	Footwear				
	Personal care				
	Jewellery				
Transport and communication	Bus				
	Rail				
	Cars				
	Air				
	Post				
	Telecoms equipment				
	Telecoms services				
Services	Financial				
	Education				
	Hospital inpatient				
	Hospital outpatient				
	Social care				
	Insurance				
Leisure and entertainment	Hotels				
	Catering				
	Audio equipment				
	Cultural services				
	Printed media				
	Package holidays				

Source: AT Kearny Consumer Wealth and Spending

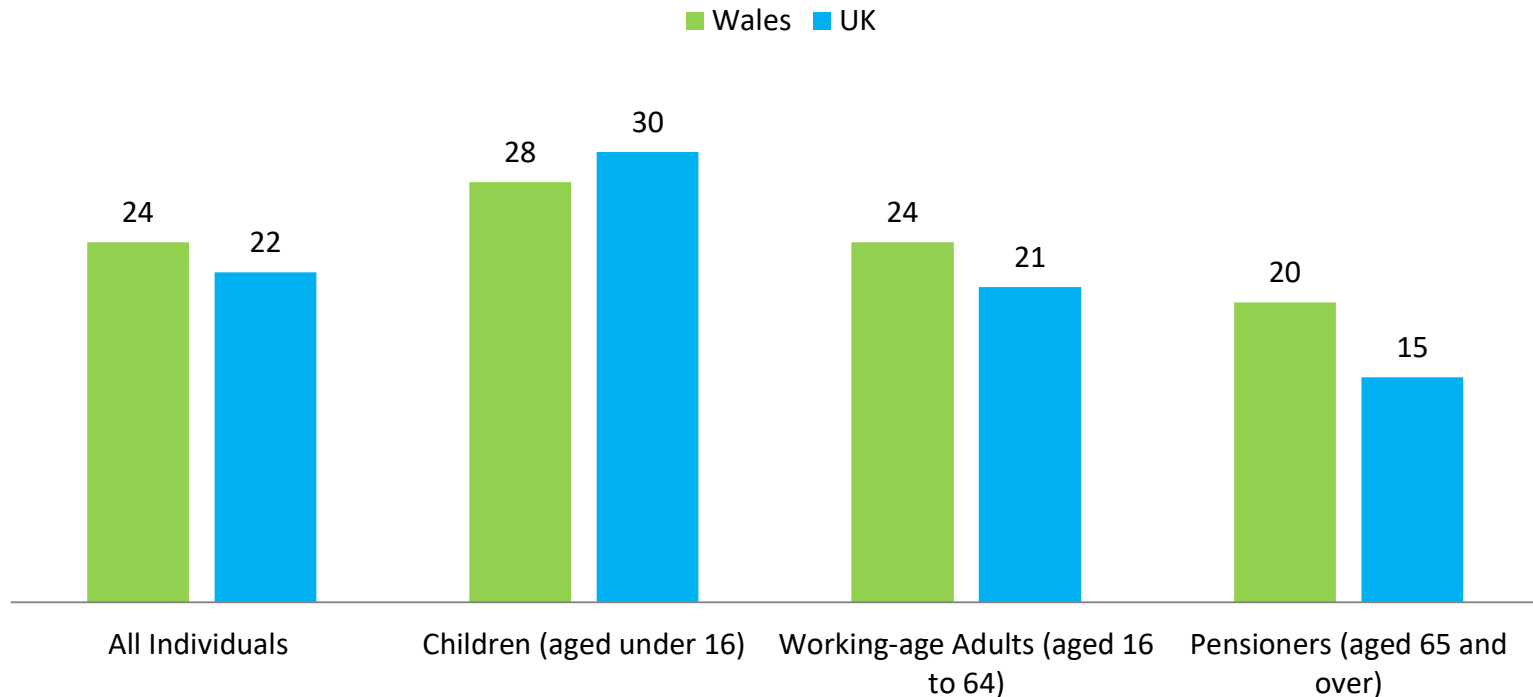
Poverty levels remain stubborn, particularly for the working age. However, there has been a long term decrease in child poverty (albeit a volatile series). Despite a slight increase in pensioner poverty in recent years, this age group remains the least at risk of being in poverty.

Percentage of different groups of people living in relative income poverty after housing costs are paid, Wales, three year moving averages: 1994 to 1997 to 2014 to 2017



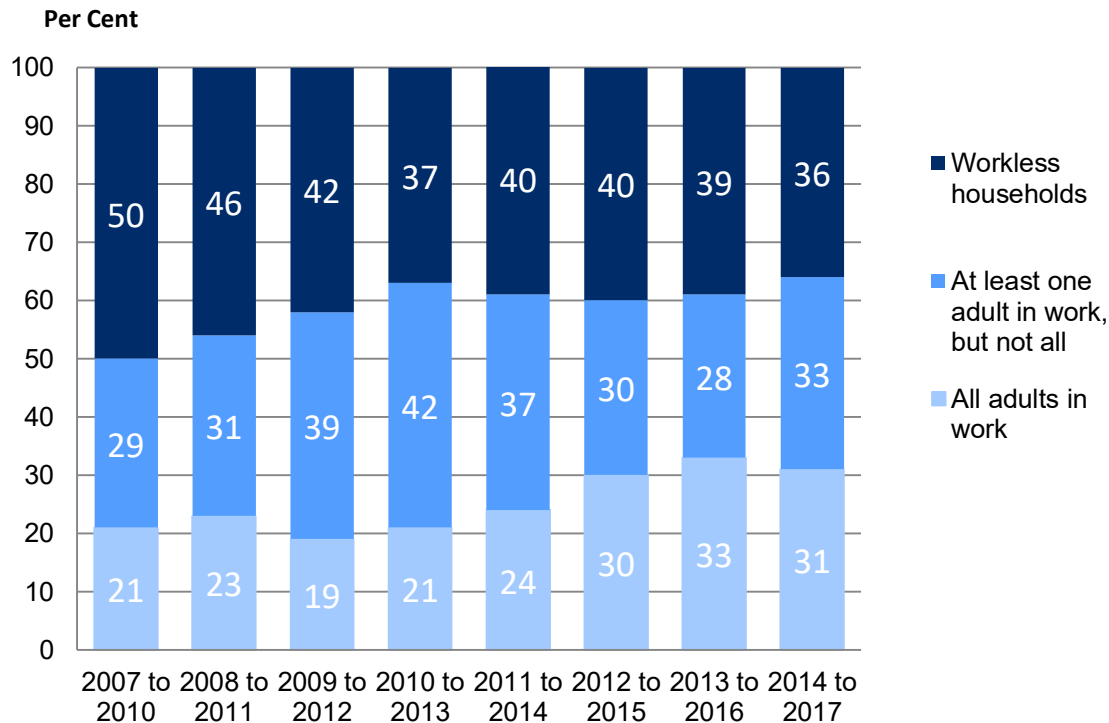
Poverty rates in Wales remain the highest outside London and higher than the UK as a whole (although the reverse is true for children in the most recent period).

Percentage of different groups of people living in relative income poverty after housing costs are paid, Wales and UK, three year averages: 2014 to 2017



In work poverty is becoming a bigger part of the picture, with 64 per cent of poor children living in working families and 60 per cent of poor working age people living in working families in the three years from 2014 to 2017.

The children in Wales who were living in relative income poverty (after housing costs), by economic status of household, Wales, three-financial-year averages



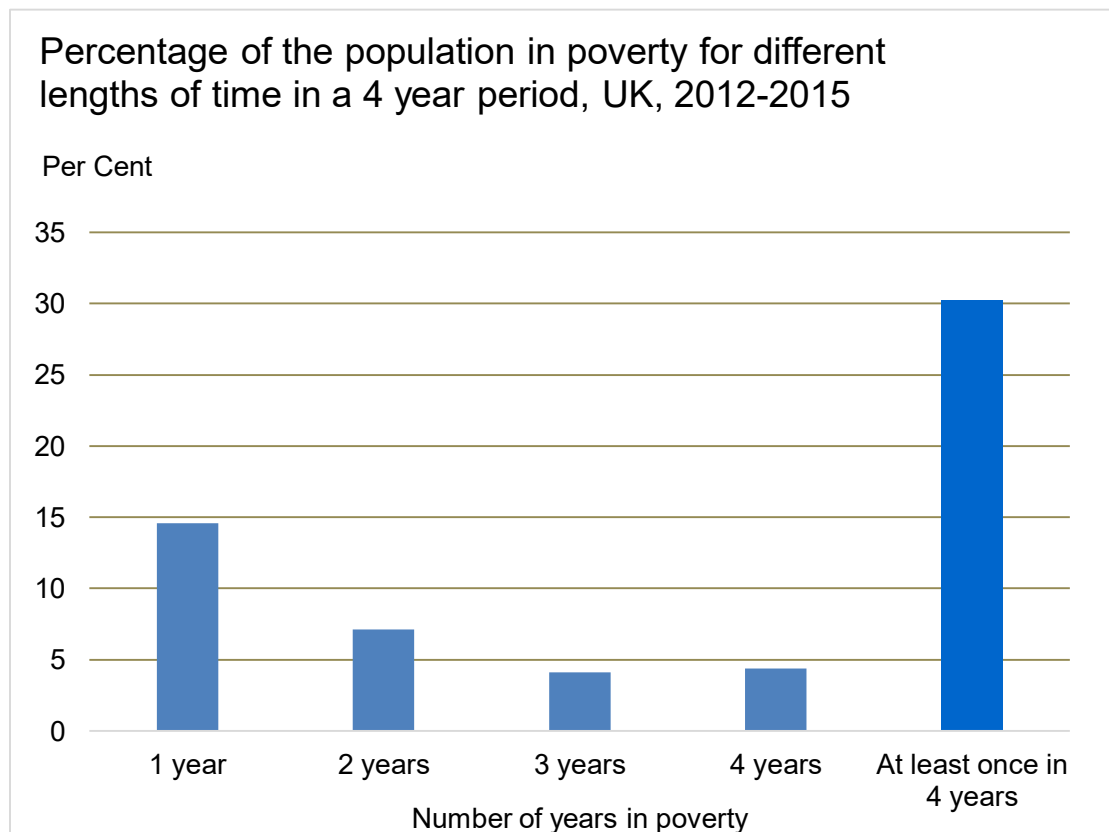
However, when considering all children in Wales, the likelihood of being in relative income poverty is much greater, and the gap is increasing for those living in a workless household compared to living in a working household (where at least one of the adults is in work).

72 per cent of children living in a workless household were in relative income poverty compared to 21 per cent living in a working household in 2014 to 2017.

It is generally agreed that persistent poverty has a much more detrimental effect on individuals and families than experiencing a low income for short periods of time.

- The ONS estimated that 16.7 per cent of people in the UK were in relative income poverty in 2015 and 7.3 per cent were in persistent poverty (defined as being in relative income poverty in 2015 as well as at least two out of the three preceding years)
- However, looking at the number of years spent in poverty over a four year period, reveals that a much higher percentage of the population are in relative income poverty at least once (30.2 per cent) than the above headline poverty rates capture.

- This research also shows that people in the UK who do experience relative income poverty, are likely to experience it for a shorter period of time than in most other EU countries (exit rates are relatively high)



Source: [Persistent Poverty in the UK and EU: 2015](#)

Some projections suggest increases in relative poverty for some groups in the short term

Poverty projections (after housing costs)

- The Institute for Fiscal Studies (IFS) has published projections for living standards, inequality and poverty in the UK through to 2021–22. Projections are not provided at a Wales level due to small sample sizes.
- Relative poverty is projected to rise by 2.3 percentage points from 21.3% in 2014–15 to 23.6% in 2021–22. The direct impact of tax and benefit reforms explains about one-third of this projected increase, as cuts to working-age benefits primarily affect low-income households. But most of the increase is explained by earnings growth benefiting middle-income households more than lower-income ones.
- Low-income households with children are set to fare worse than other households. As a result, relative child poverty is projected to rise significantly from 29.0% (or 3.9 million children) in 2014–15 to 35.7% (or 5.1 million children) in 2021–22.
- Absolute poverty is projected to fall slightly, from 20.3% to 19.8% between 2014–15 and 2021–22. But absolute child poverty is projected to rise from 27.5% in 2014–15 to 30.3% in 2021–22. This increase is entirely explained by the impact of tax and benefit reforms.
- On the other hand, falls are projected in absolute poverty rates among pensioners (from 12.8% to 10.9%) and working-age adults without children (from 17.6% to 15.6%).

Large numbers of deprived individuals live outside the ‘hot spots’ of deprivation, and not all people in those areas are deprived

- There can be individuals in deprived areas that would not be considered deprived; and there can also be individuals that would be considered deprived in the least deprived areas.
- This is important to remember when targeting resources, as targeting those ‘most deprived’ areas leads to some households in those areas who may not be deprived being included and many deprived households living in less deprived areas missing out.

	% of all income deprived people	% of all employment deprived people
10% most deprived LSOAs in Wales	22	20
20% most deprived LSOAs in Wales	38	36
20 % least deprived LSOAs in Wales	7	8

Concentration of income deprived people:

- The table shows us that 22% of all income deprived people in Wales were living in the 10% most deprived LSOAs in Wales in 2014
- But what this also means is: 78% of income deprived people in Wales were **not** in the 10% most deprived LSOAs in Wales in 2014
- In fact, 7% of income deprived people in Wales were living in the 20% **least deprived** LSOAs in Wales

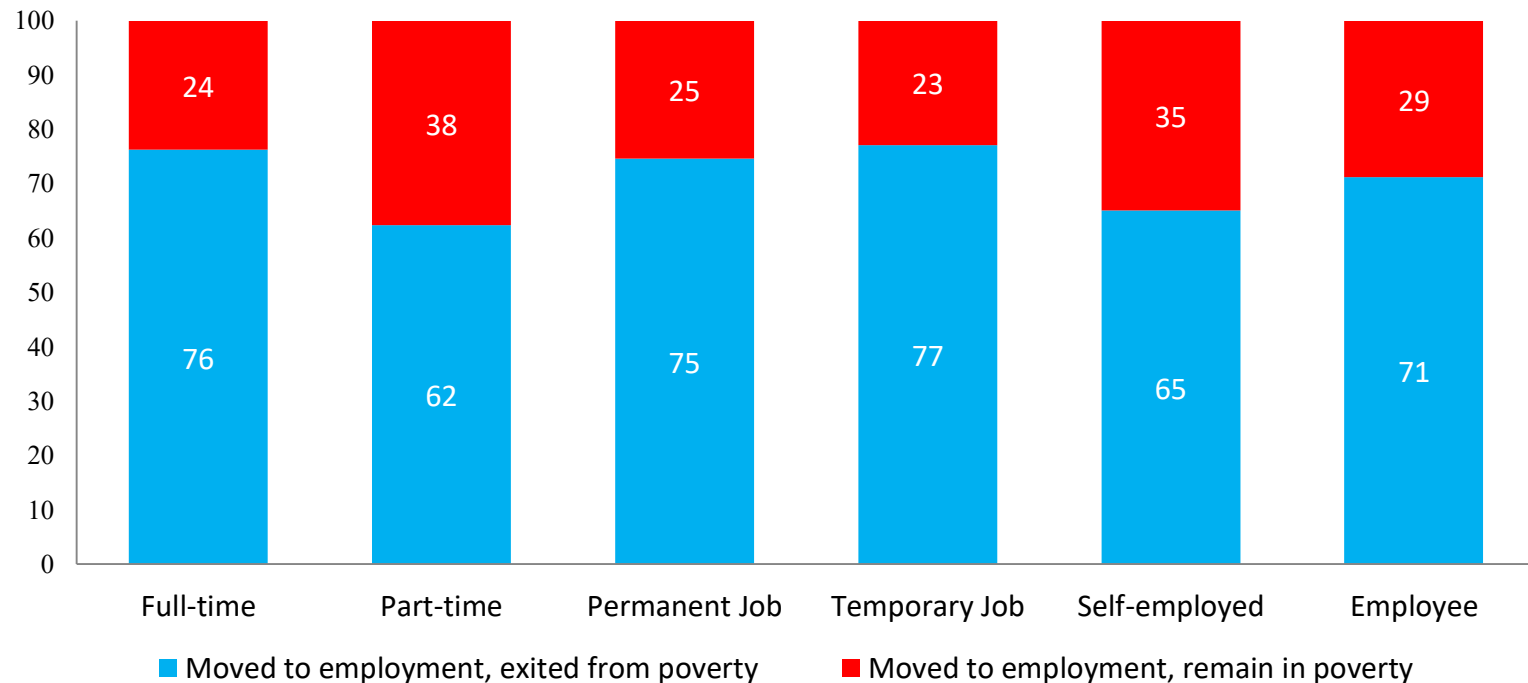
Concentration of employment deprived people:

- The table shows us that 20% of all employment deprived people in Wales were living in the 10% most deprived LSOAs in Wales in 2014
- But what this also means is: 80% of employment deprived people in Wales were **not** in the 10% most deprived LSOAs in Wales in 2014
- In fact, 8% of employment deprived people in Wales were living in the 20% **least deprived** LSOAs in Wales

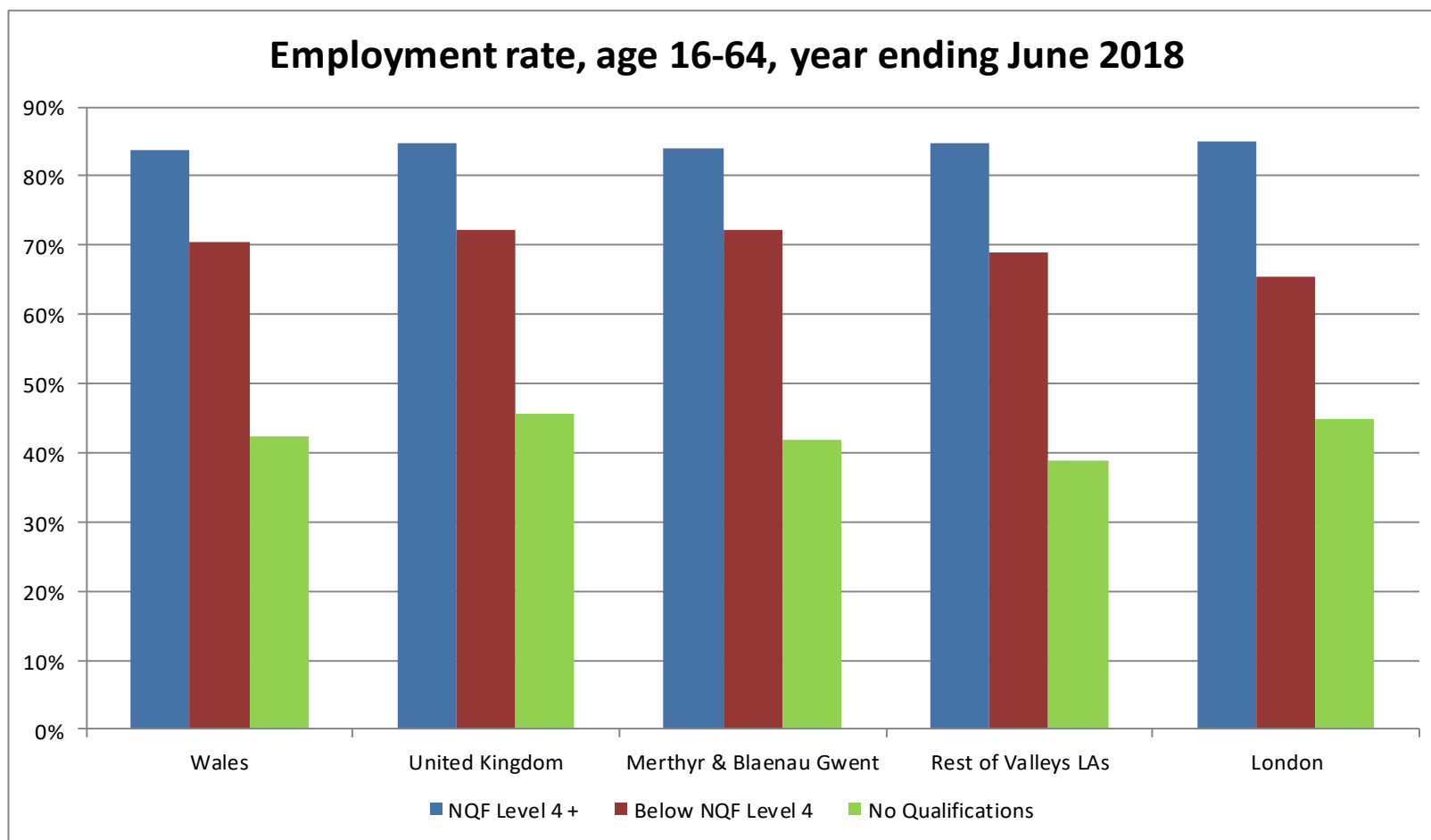
Entering employment is the most common reason for leaving poverty, however jobs have not always succeeded in lifting people out of poverty

- Academic research has consistently shown that over the period 2007 to 2012, 70% of people aged 18 to 59 who were not working and living in relative income poverty who moved into employment, exited poverty. The other 30% remained in relative income poverty despite entering employment.
- The likelihood of whether or not a person moves out of poverty when they enter employment depends on what kind of work he or she moves into.

Poverty exit rates for people moving into work by characteristics of employment, UK, 2007 to 2012



Individual and family characteristics are more important for people's outcomes than geography – e.g. employment rates link more strongly to qualification levels than to area

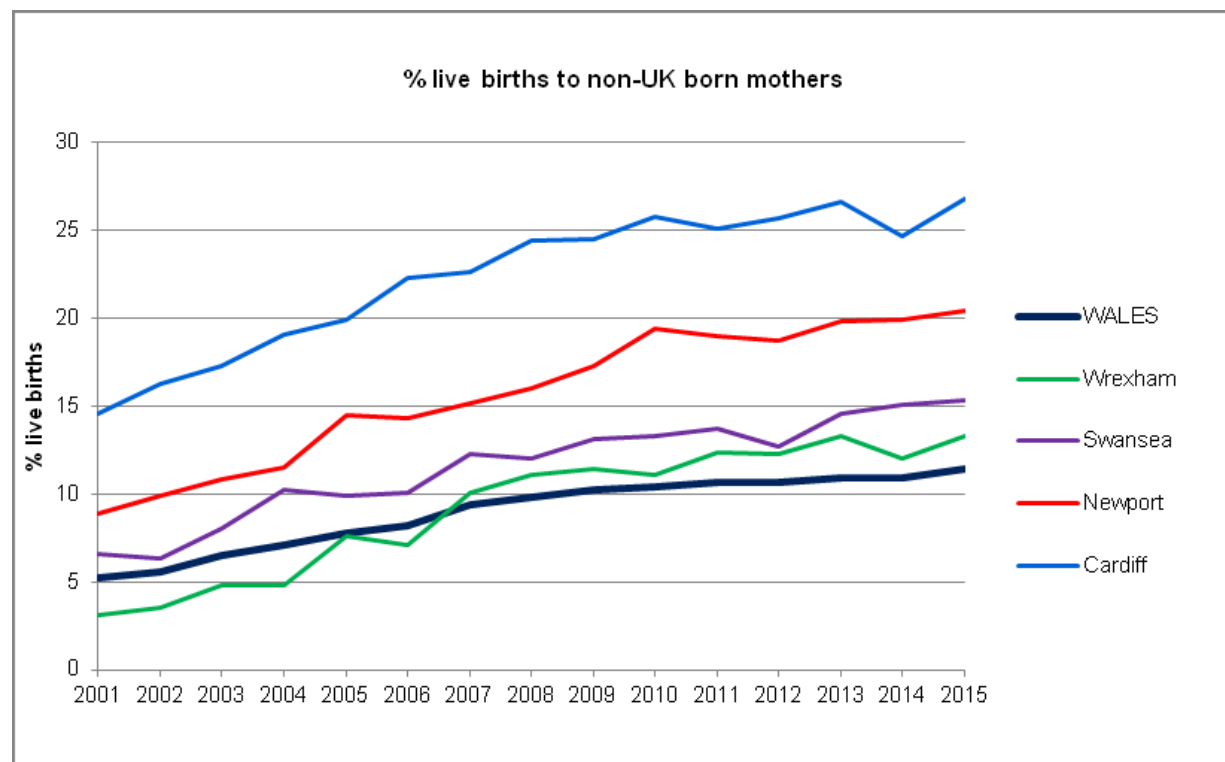


Source: Annual Population Survey

The proportion of the population of Wales born in Wales is slightly but steadily decreasing with the proportion born outside the UK steadily increasing.

	Wales	rest of UK	non-UK
1991	77.2	20.1	2.7
2001	75.4	21.5	3.2
2004	74.0	22.6	3.4
2005	73.5	22.8	3.7
2006	73.3	22.6	4.1
2007	72.2	23.3	4.4
2008	72.0	23.4	4.6
2009	72.1	23.0	4.9
2010	71.9	23.0	5.1
2011	71.8	23.1	5.2
2012	71.3	23.5	5.2
2013	71.4	23.2	5.4
2014	71.0	23.2	5.9
2015	71.0	23.4	5.6

The proportion of births to mothers born outside the UK has nearly doubled in the last decade, driven by growth in urban centres - but not exclusively



Selected authorities 2005-15:

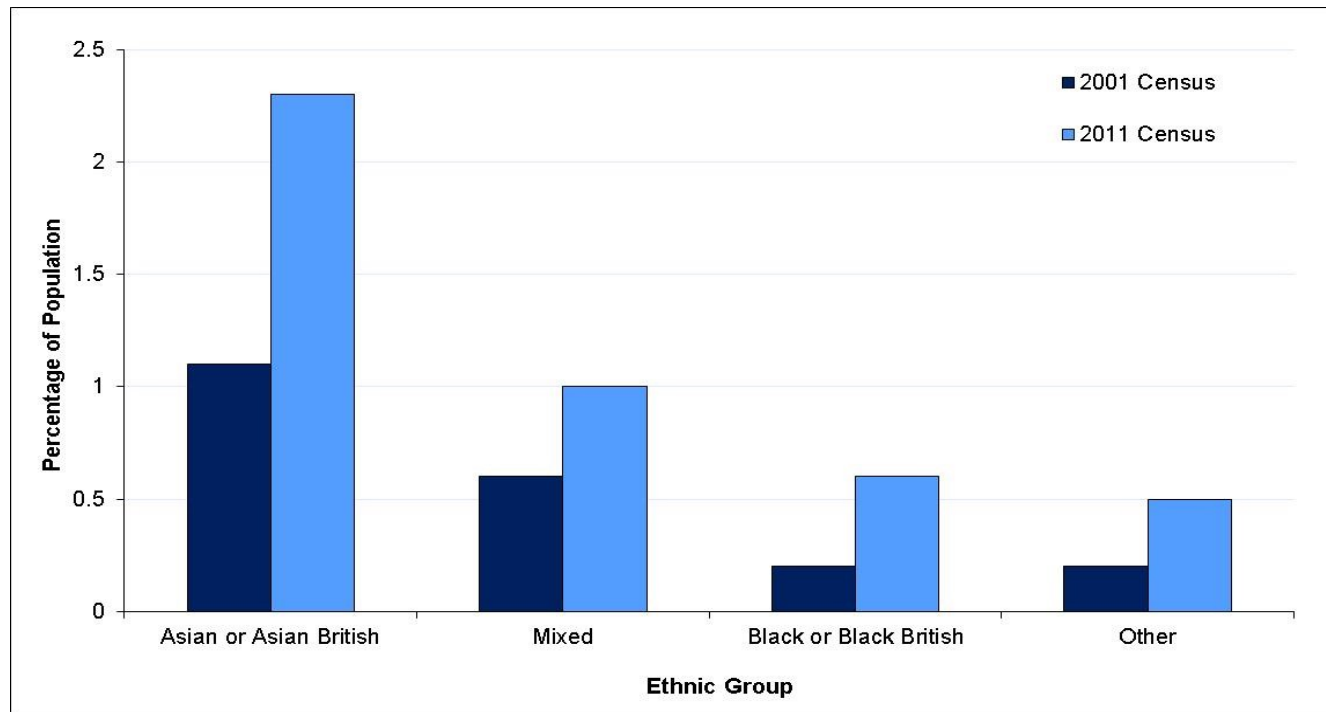
	2005	2015
Gwynedd	5.3	8.4
Flintshire	4.2	11.8
Wrexham	7.6	13.3
Powys	6.0	9.2
Carmarthenshire	5.0	8.9
Swansea	9.9	15.3
Bridgend	4.3	6.8
Merthyr Tydfil	4.5	8.7
Torfaen	2.8	4.7

The authorities shown are those with the highest proportionate increases 2005 to 2015.

Around 11 per cent of live births to Welsh residents in 2015 were to non-UK born mothers. This proportion has risen by 4 percentage points in the last decade and by 6 percentage points since 2001. In 2015 the highest proportions were seen in the large urban centres although authorities such as Flintshire and Merthyr Tydfil have also seen recent increases. In nearly all local authorities growth has slowed in recent years.

Wales is becoming more diverse

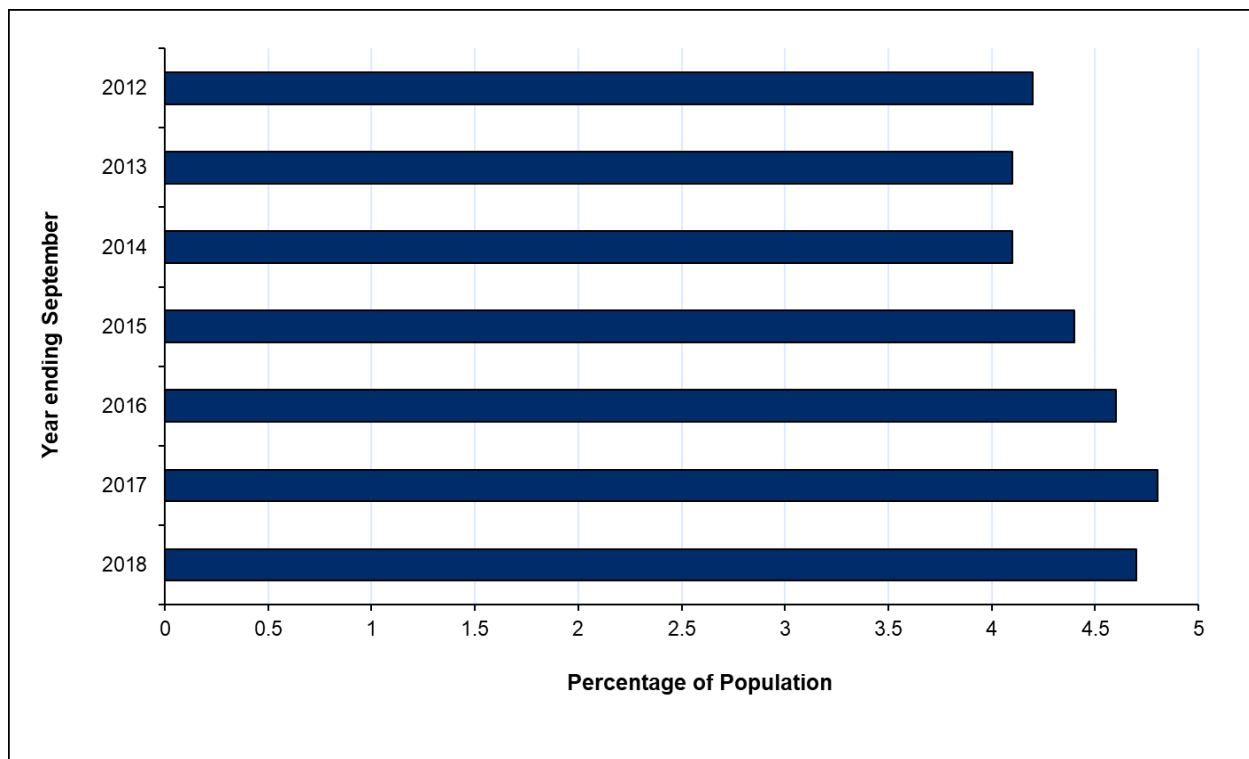
Non-white (including mixed) ethnic groups represented 4.4 per cent of the population in 2011, up from 2.1 per cent in 2001. However, across the England regions and Wales, Wales was the least diverse area, followed by the South East and the North East.



Although survey data is relatively static in more recent years

Since the 2011 Census, estimates from the Annual Population Survey show that the percentage of the population who say they are from a non-white background has remained relatively static.

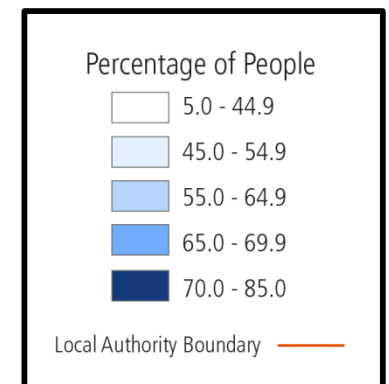
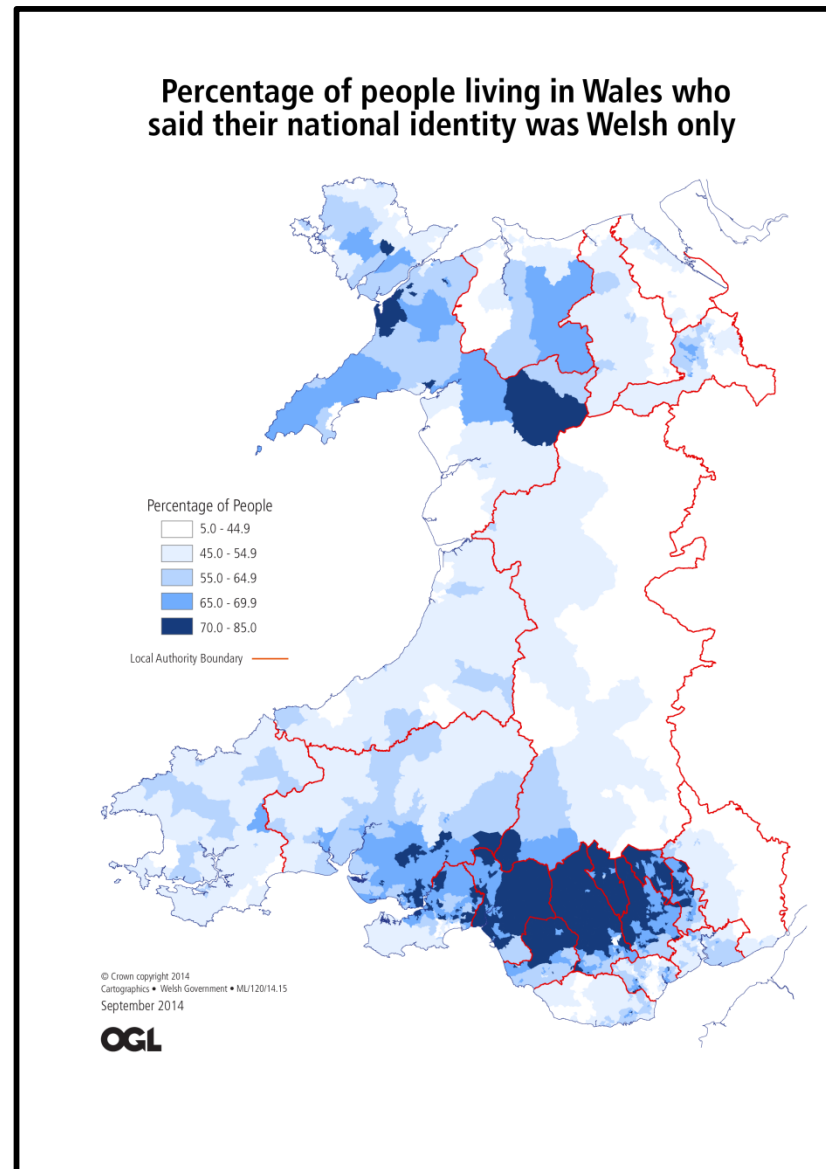
Percentage of population from a non-white background, Wales



Source: Annual Population Survey

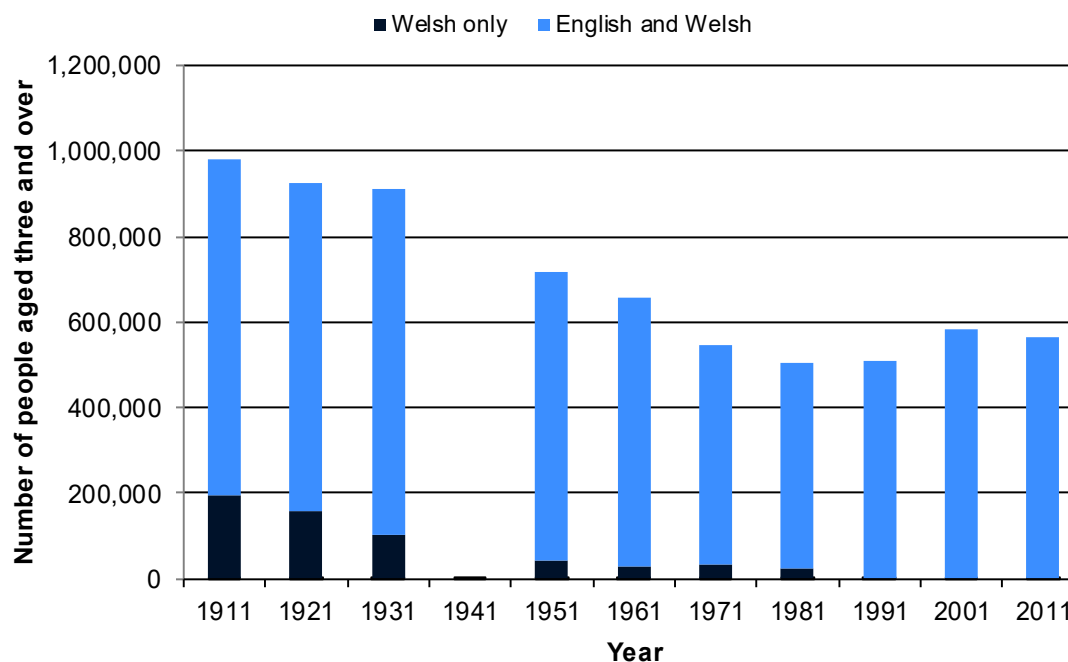
<https://stats.wales.gov.wales/Catalogue/Equality-and-Diversity/Ethnicity/ethnicity-by-year-ethnicgroup>

Around two-thirds of the population identify themselves as Welsh, although identity is not evenly spread geographically



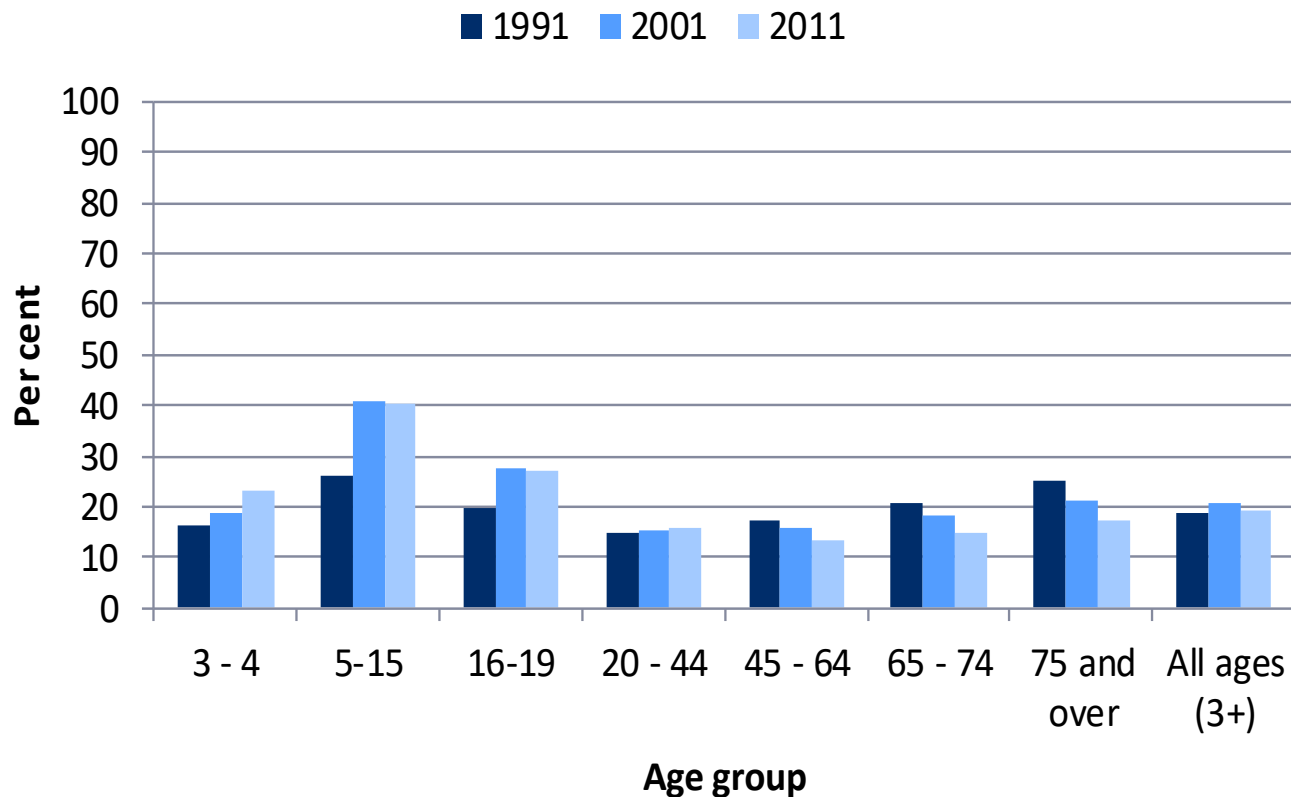
One in five people speak Welsh, but there was a decline between the last two Censuses

- Long-term decline over the last century in Welsh speakers, but the figures are higher than in 1991
- 19 per cent of the population could speak Welsh in 2011, down from 20.8 per cent in 2001; this is equivalent to 20,000 fewer people
- Decline in 2011 is down to migration, fewer children, ageing population and loss of skills between censuses
- Estimates suggest a loss of 1,200 – 2,200 fluent speakers per annum



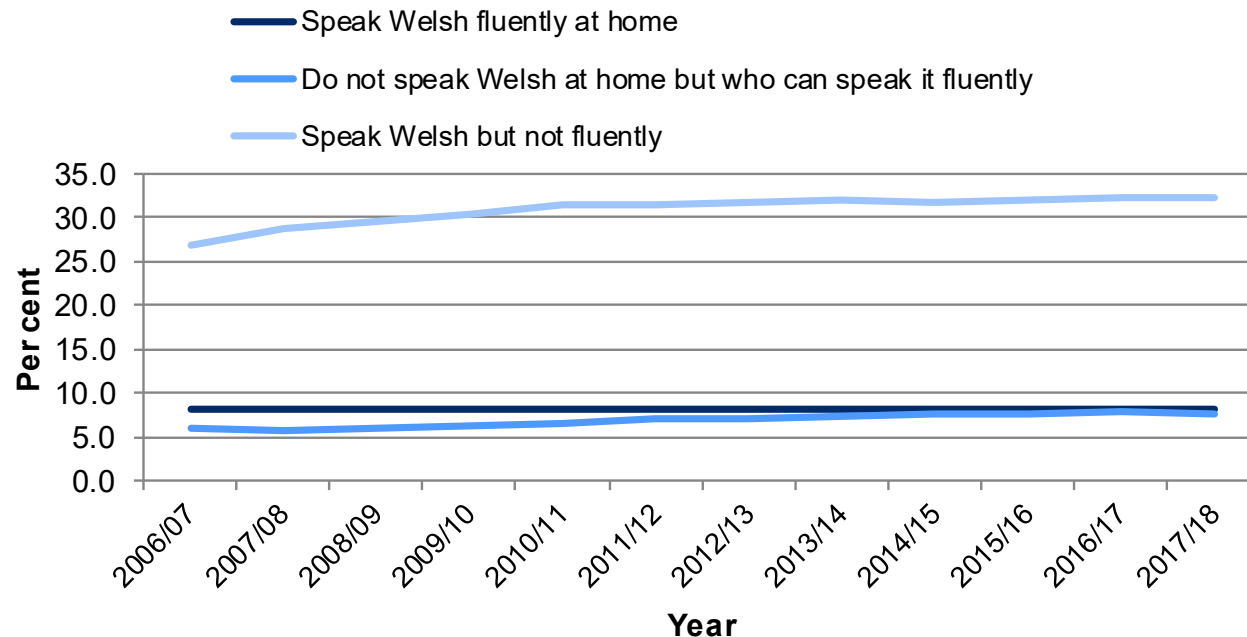
Much of the growth in 2001 was due to increases in younger age groups, but the challenge is to maintain skills post-compulsory education

Percentage able to speak Welsh by age



There has been an increase in speaking Welsh among school children, although not reflected in speaking Welsh at home

Pupils aged five and over in maintained schools by ability to speak Welsh as assessed by parents (a)

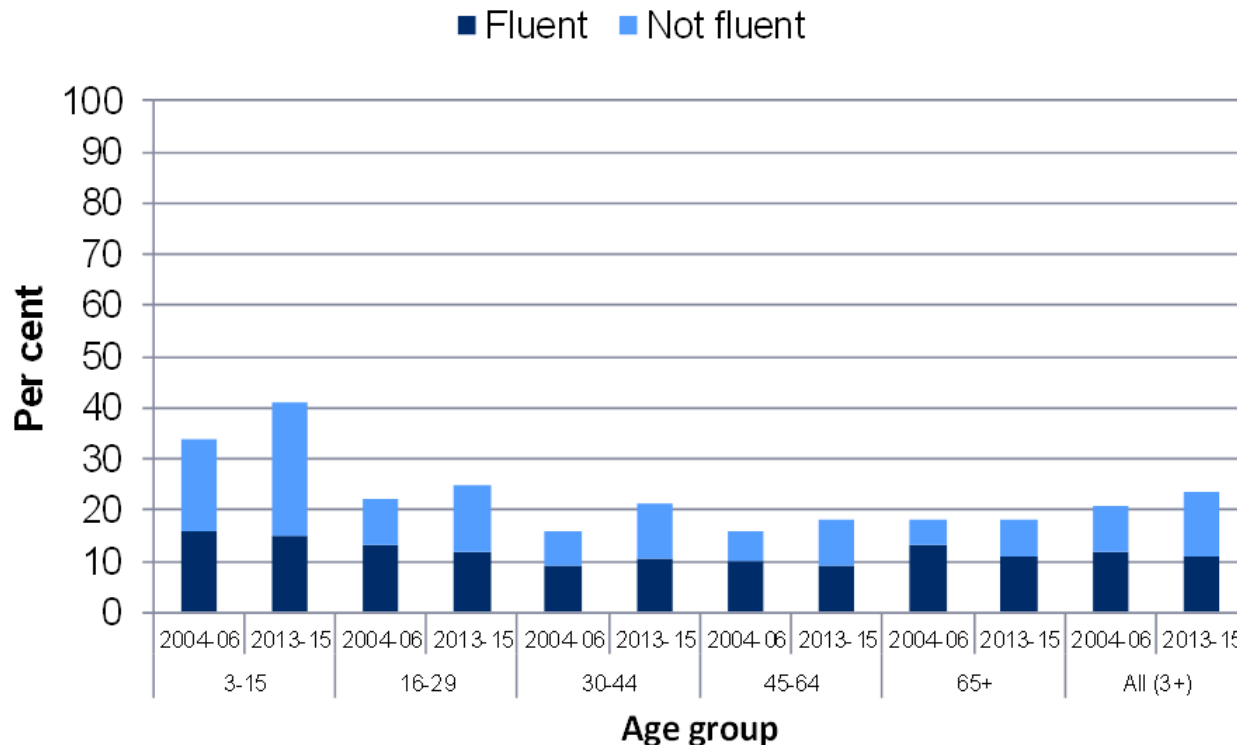


(a) The data mainly represents parents' perceptions of their children's fluency and will not necessarily be the same as the ability shown by the pupil in their school work.

More recent data suggest an increase in non-fluent Welsh speakers, with over half of Welsh speakers now not fluent

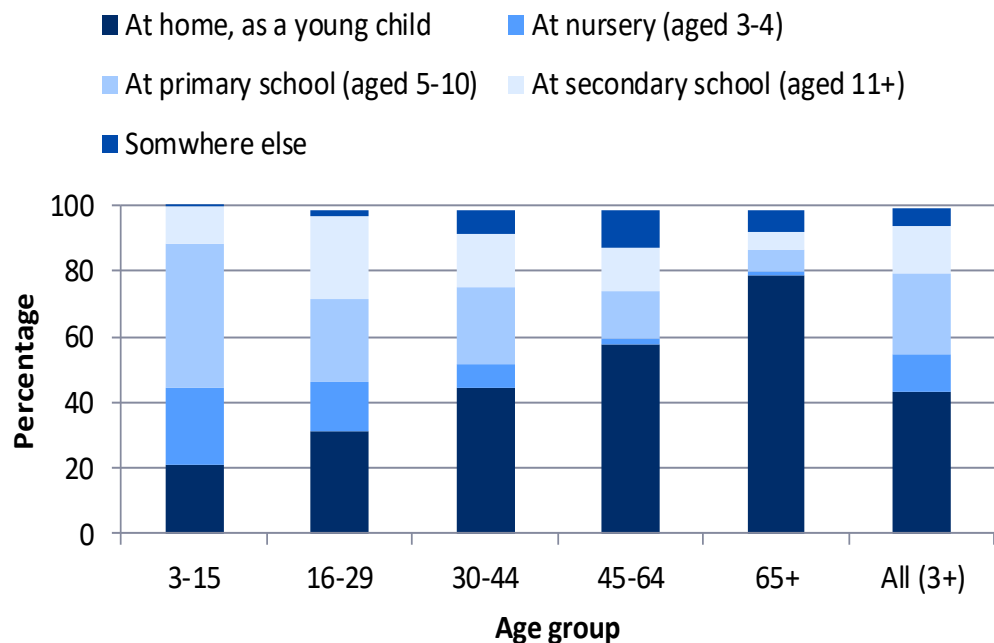
- Both the percentage and the number of Welsh speakers are fairly similar to those in the Welsh Language Use Surveys of 2004-06, although 130,700 more people now say that they speak Welsh but not fluently

Percentage of people who speak Welsh by fluency and age



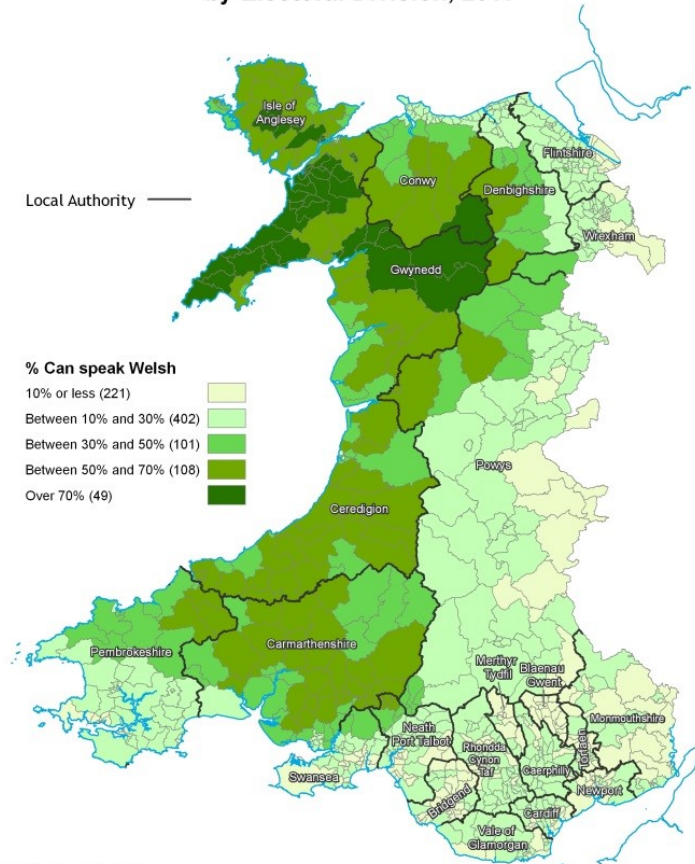
Rates of parental transmission mean that the future of the language cannot be taken for granted, and new Welsh speakers are far more likely than adults to have learnt Welsh in school

- Where two adults could speak Welsh, around 18 per cent of three to four year olds did not speak Welsh – a figure that has remained stable in 2001 and 2011. Where one adult spoke Welsh, just 45 per cent of three to four year olds also did so. (*Census*)
- The proportion of households that were entirely Welsh-speaking decreased from 11.1 per cent in 2001 to 9.4 per cent in 2011. (*Census*)
- Young Welsh speakers are more likely to have learnt to speak Welsh at school than anywhere else. Older Welsh speakers are more likely to have learnt Welsh at home as a young child than anywhere else. (*Welsh Language Use Survey*)



Despite declines in the north and west, it is still possible to identify a Welsh speaking 'heartland'...and there are increasing numbers of Welsh speakers in the south-east

Proportion of people (aged 3 and over) able to speak Welsh,
by Electoral Division, 2011



Source: 2011 Census

Biggest falls in Welsh speaking 2001-2011:

Carmarthenshire	-6 percentage points
Ceredigion	-5 percentage points
Gwynedd	-4 percentage points

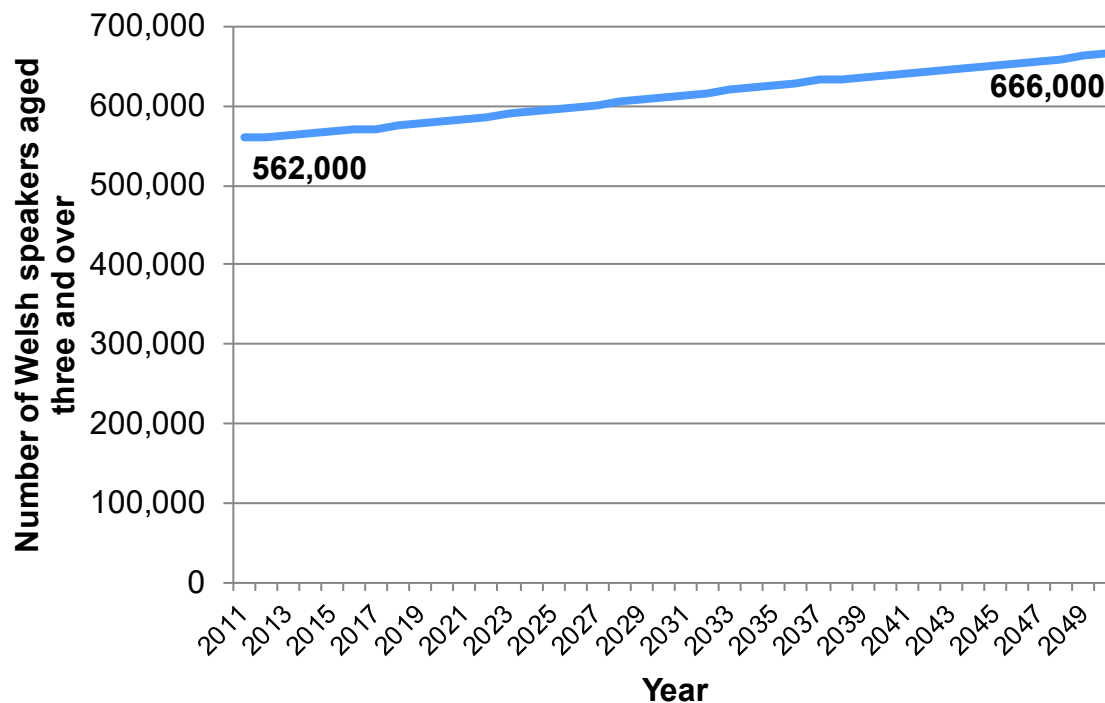
Largest growth in Welsh speakers 2001-2011:

Cardiff	+4,231
Monmouthshire	+1,092
Caerphilly	+1,014

The Welsh Government has set its ambition to reach a million Welsh speakers by 2050.

- Projections for the number of Welsh speakers, previously calculated by the Welsh Language Board but now [updated with 2011 Census data](#) by the Welsh Government, project that under recent demographic trends alone there would be around 666,000 Welsh speakers aged three and over by 2050.

Projected number of Welsh speakers aged three and over, 2011 to 2050



For more information on the Welsh Government Future Trends Report 2017, please visit the following address:

<http://gov.wales/statistics-and-research/future-trends/>

Background data slides are also available on the website for the other Themes of the Future Trends Report: Population; Health; Economy & Infrastructure; Climate Change; and Land Use & Infrastructure.