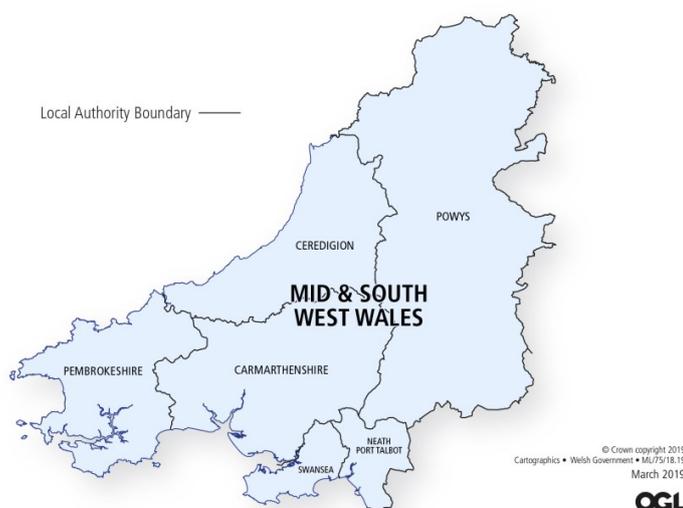


Summary statistics for Welsh economic regions: Mid and South West Wales

30 May 2019
SFR 39/2019

The Mid and South West Wales region comprises the local authorities of Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys and Swansea. The aim of this release is to give a statistical breakdown of the region and to highlight differences that may exist across the region for the nine topics in question.



Key Points

- Mid and South West Wales is the least densely populated of the three regions. It is also the region with the lowest projected population growth over the next ten and twenty years.
- Population data shows that there were more males than females between the ages of 20-30 in the region in 2017.
- Mid and South West Wales had a greater low-carbon energy capacity (MW) in 2017 than the other Welsh regions. 64 per cent of Wales' onshore wind projects, 62 per cent of Wales' biomass projects and 54 per cent of Wales' heat pump projects were based in the region.¹
- 8 per cent of homes and businesses had access to full fibre services in September 2018, this was higher than the UK and Wales averages.
- Household projections indicate that by 2039, the number of one-person households could be around 154,000, of which almost a third (32 per cent) would be in Swansea.

About this release

This release is one of four statistical outputs summarising statistics on nine key topics for Wales and the three Welsh economic regions, as defined in the Economic Action Plan. Together these releases have been prepared to inform regional planning, supporting the National Infrastructure Commission for Wales, the National Development Framework and the Economic Action Plan.

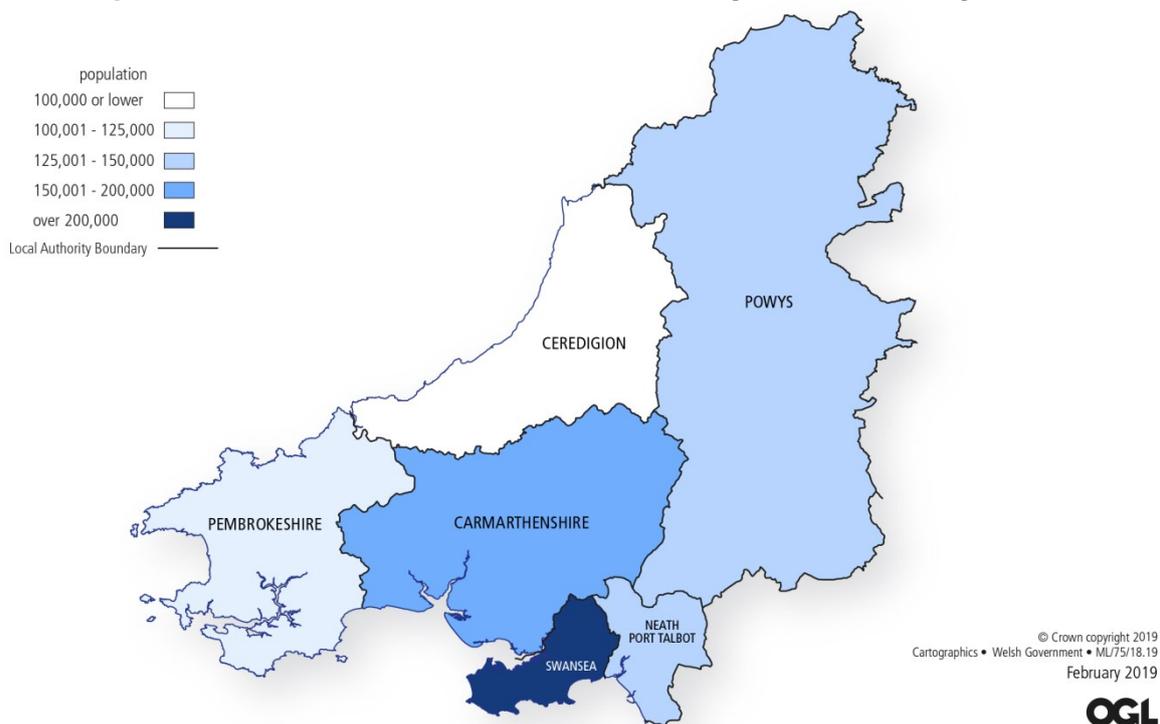
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¹ (r) This paragraph was revised on 23/08/2020

Population

Figure 1: Population in Mid and South West Wales, by local authority, 2017



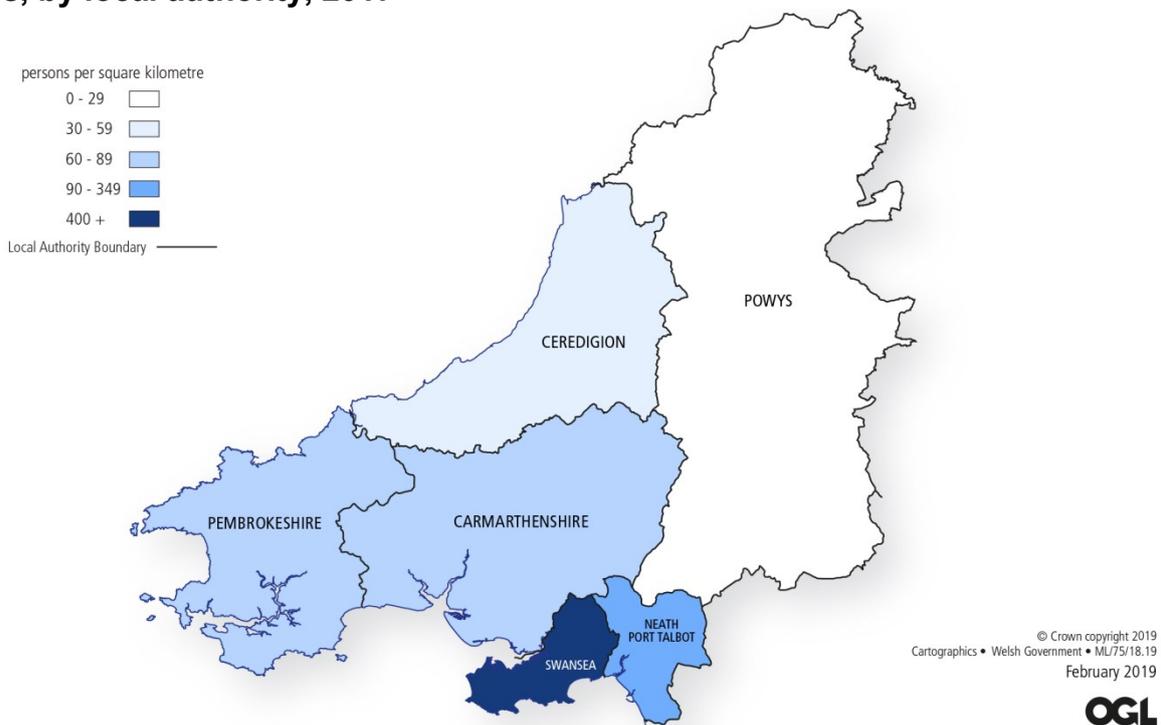
Source: Mid-year population estimates, Office for National Statistics

Mid and South West Wales had a population of [approximately 904,000 persons²](#) in 2017.

The largest authority in this region, in terms of residents, was Swansea, with an estimated population of around 245,000 in 2017. The smallest, on the other hand, was Ceredigion with a population of around 73,000.

² [StatsWales: Population estimates by local authority and year](#)

Figure 2: Population density (persons per square kilometre) in Mid and South West Wales, by local authority, 2017



Source: Mid-year population estimates, Office for National Statistics; Standard area measurements, Office for National Statistics

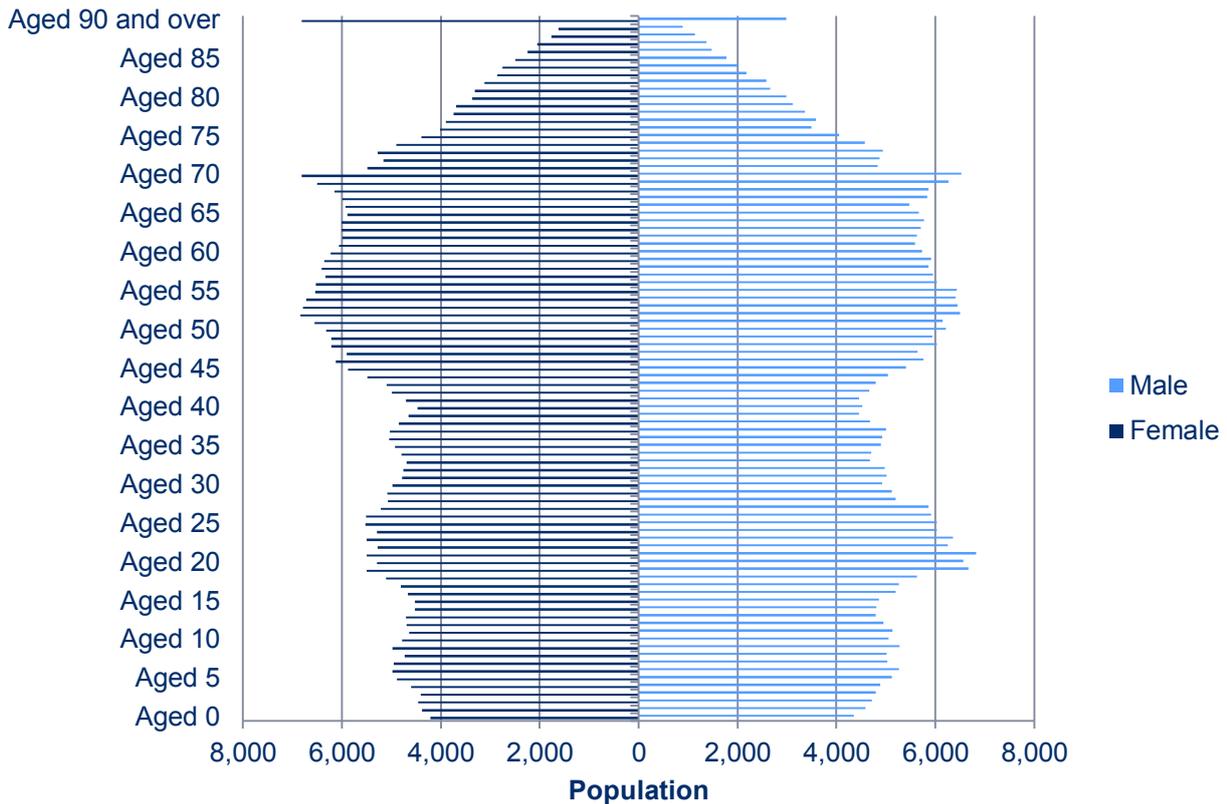
Mid and South West Wales had a [population density](#)³ of 76.8 persons per square kilometre in 2017, the lowest of the three regions in Wales.

Swansea was the most densely populated authority at 646.6 persons per square kilometre. Despite containing Wales' second-largest city, it is only the fifth most densely populated authority in the country after Cardiff, Newport, Torfaen and Caerphilly. Furthermore, 4 of the 5 most sparsely populated authorities in Wales were in the region. The most sparsely populated authority in the region and in Wales was Powys, with a population density of 25.6 persons per square kilometre. Between 2007 and 2017, population density grew by 2.8 per cent in Mid and South West Wales. The authority with the greatest population density growth rate in the region over this period was Swansea, at 5.6 per cent. Ceredigion saw the lowest rate in the region and also in Wales, with population density decreasing by 3.0 per cent from 2007 to 2017.

Welsh Government analysis of 2011 Census data (unpublished) shows that in Mid and South West Wales, both the number and proportion of residents living in settlements classified "sparsest" was higher than in the other two regions, with almost a third of the region's residents living in such settlements.

³ [StatsWales: Population density \(persons per square kilometre\) by local authority and year](#)

Figure 3: Population distribution in Mid and South West Wales by age and gender, 2017



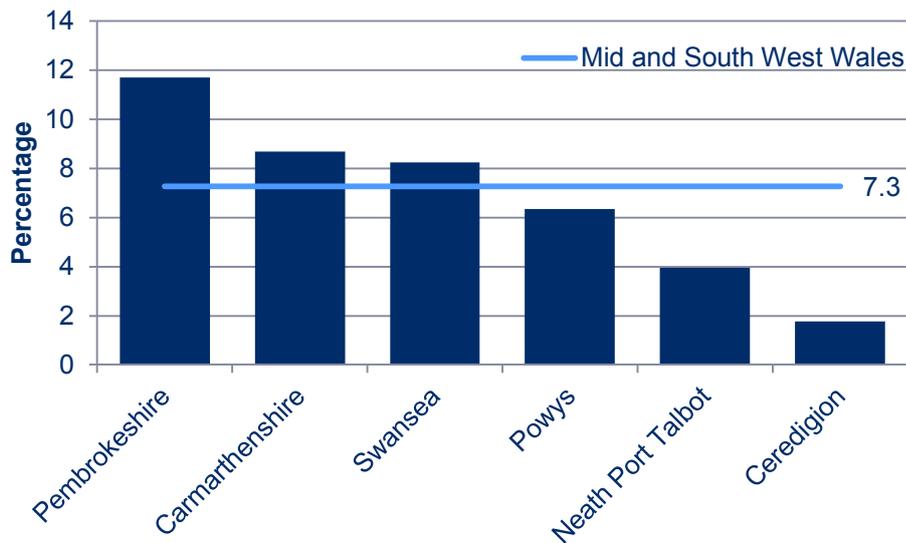
Source: Mid-year population estimates, Office for National Statistics

Mid and South West Wales shows clear signs of an [ageing population](#)⁴ in the region. Between 1997 and 2017, the proportion of the [population aged 65 and over](#)⁵ has increased from 19 per cent to 23 per cent, while the proportion of the population aged 15 and under has fallen from 20 per cent to 17 per cent. The shape of the population pyramid indicates there were more males than females between the ages of 20-30 in 2017.

⁴ [StatsWales: Population estimates by gender and year](#)

⁵ [StatsWales: Population estimates by local authority and age](#)

Figure 4: Percentage population change in Mid and South West Wales, by local authority, 1997-2017



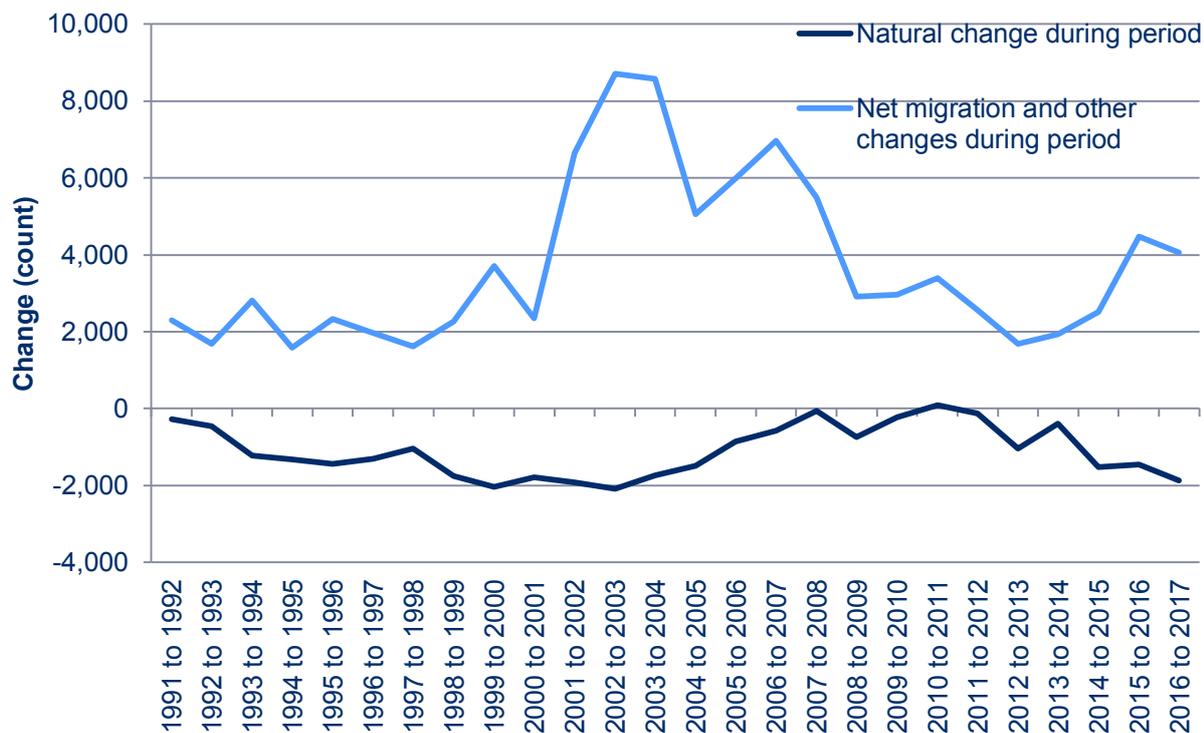
Source: Mid-year population estimates, Office for National Statistics

In Mid and South West Wales, the [regional population change](#)⁶ over the 1997-2017 period was 7.3 per cent. However, on a local authority level, population growth has been variable.

Swansea's population grew by 5.6 per cent between 2007 and 2017, more than any other local authority in the region in this period. Ceredigion's population grew by 4.9 per cent from 1997 to 2007, and then contracted by 3.0 per cent from 2007 to 2017. This was the greatest population contraction in Wales for the 2007-2017 period.

⁶ [StatsWales: Population estimates by local authority and year](#)

Figure 5: Components of population change in Mid and South West Wales over time



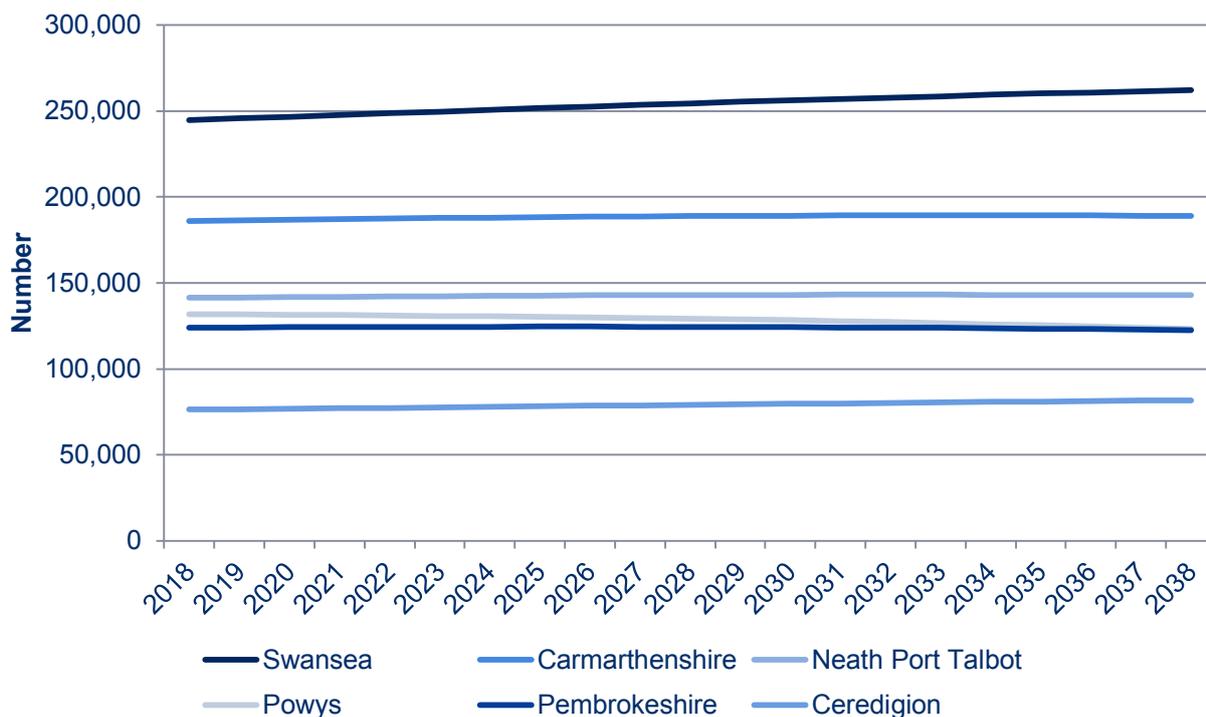
Source: Mid-year population estimates, Office for National Statistics

Looking at data showing [components of population change](#)⁷ across Mid and South West Wales, we see that since the 1991-92 period, more population change is attributable to net migration and other changes than to natural change (births and deaths). Since the 1991-92 period, net migration and other changes have been strictly positive, meaning that more people have been moving into the region than have been moving out, while natural change has been almost entirely negative across the region, meaning that the birth rate has been lower than the death rate.

Looking at local authorities, Swansea saw the largest net change in population due to migration and other changes during the 2016-17 period. We also notice that population change due to net migration and other changes was positive in all authorities during this period, except in Ceredigion, making it the only authority in the region and in Wales where more people are moving away than are moving in. All 6 local authorities experienced negative natural change during this period, meaning the number of deaths was higher than the number of births. Mid and South West Wales was the only region in Wales where this was the case in each of the authorities. The highest level of negative natural change was in Powys.

⁷ [StatsWales: Components of population change, by local authority and component](#)

Figure 6: Projected population change in Mid and South West Wales over time, by local authority



Source: 2014-based projections for local authorities in Wales, Welsh Government

Mid and South West Wales is the region with the lowest [projected](#)⁸ population growth over the next ten and twenty years, with projected growth rates of 1.6 per cent for the 2018-2028 period and 1.9 per cent for the 2018-2038 period.

Figures quoted are based on the principal population projections. However, a number of variant projections are also produced which provide other future scenarios based on alternative assumptions of future fertility, mortality, and migration. These do not represent upper or lower bounds, but do illustrate what the population could look like if, for example, fertility were to become lower than assumed for the principal projection.

Further information on 2014-based local authority population projection variants can be found accompanying the [Local authority population projections release](#)⁹.

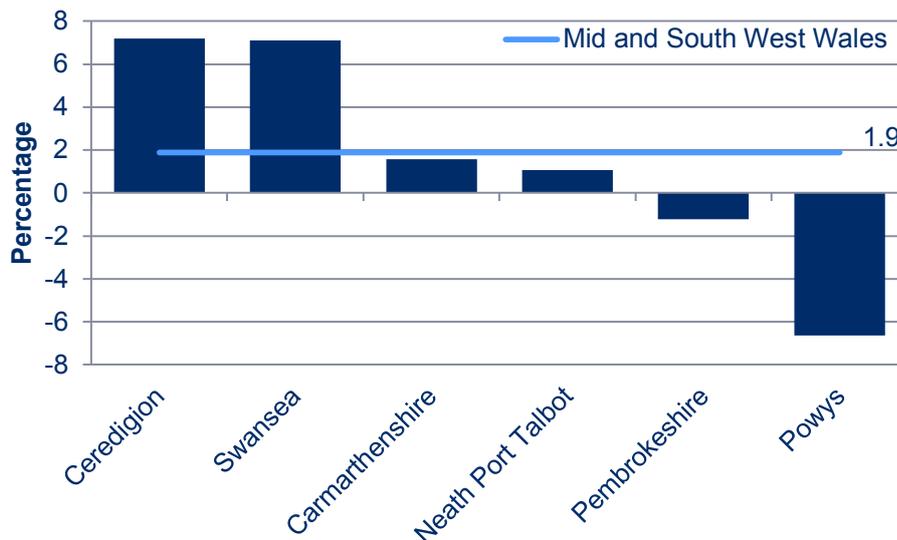
Further information on 2016-based national population projection variants can be found on the [ONS website](#)¹⁰.

⁸ [StatsWales: Population projections by local authority and year](#)

⁹ [Welsh Government: Local authority population projections \(2014-based\)](#)

¹⁰ [ONS: National Population Projections: 2016-based statistical bulletin](#)

Figure 7: Percentage change in projected population in Mid and South West Wales, by local authority, 2018-2038



Source: 2014-based projections for local authorities in Wales, Welsh Government

Swansea’s population is projected to grow the quickest over the 2018-2028 period in percentage terms, closely followed by Ceredigion. Powys’ data suggests a contraction of 2.1 per cent between 2018-2028, decreasing to a 6.6 per cent contraction in the 2018-2038 period. In 2 authorities, Neath Port Talbot and Pembrokeshire, the population is projected to grow in the next ten years, and then contract in the following ten-year period.

As projected net migration is held constant in the subnational population projections, any change in the projected population in future years is due to a change in natural change (i.e. the number of births and deaths). These are, however, based on the local authority 2014-based projections, and should not be treated as forecasts.

Figure 8: Percentage change in projected population of persons aged 65 and over in Mid and South West Wales, by local authority, 2018-2038 (based on 2014 projections)

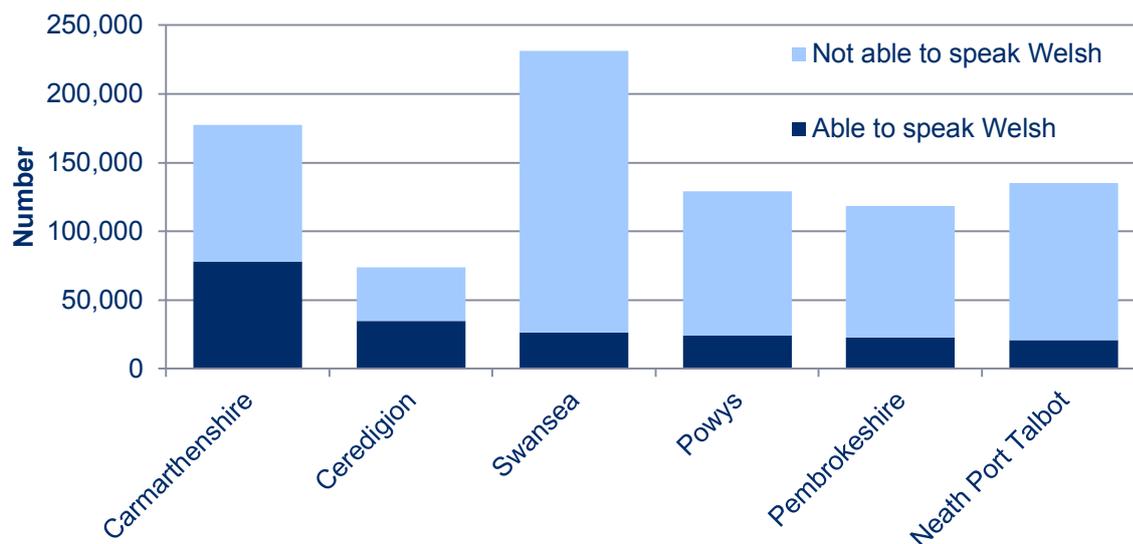


Source: 2014-based projections for local authorities in Wales, Welsh Government

Across Mid and South West Wales, the population of [adults aged 65 and over](#)¹¹ is projected to grow to 246,700 by 2028, an increase of 17.3 per cent on the projected figure for 2018. By 2038, this figure is projected to increase to 274,500, an increase of 30.5 per cent on the projected figure for 2018. The population of adults aged 65 and over is projected to grow at a higher rate than the total population during this period. This data is based on the local authority 2014-based projections, and should not be viewed as a forecast.

¹¹ [StatsWales: Population projections by local authority and year](#)

Figure 9: Stated Welsh-speaking ability of persons aged three and over in Mid and South West Wales, by local authority, 2011



Source: 2011 Census, Office for National Statistics

According to [census data](#)¹², 206,818 persons aged three and over in the region said they could speak Welsh in 2011. Although the number of Welsh speakers may be similar in different areas, it's important to also consider the percentage of Welsh speakers in each area as this may vary considerably due to different population sizes. Swansea, for example, had the third-highest number of Welsh speakers in the region, but the lowest proportion of Welsh speakers as a percentage of the population (11.4 per cent).

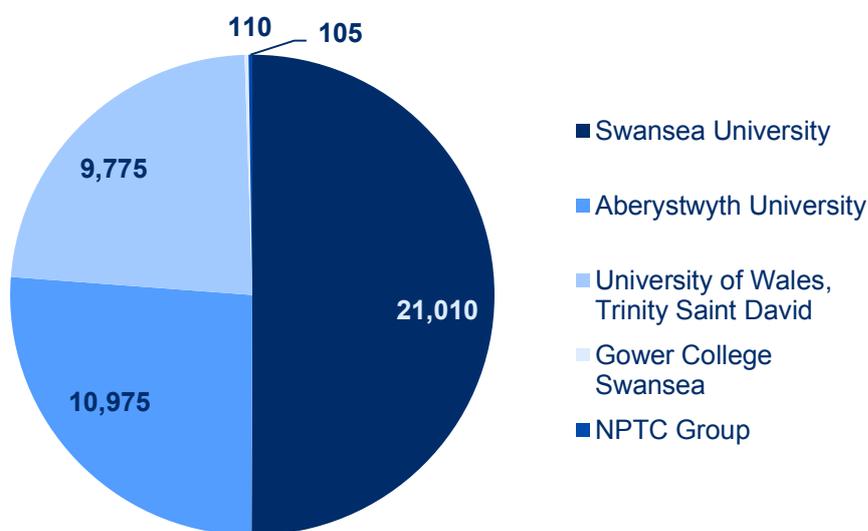
The census is the key source of information about the number of people who can speak Welsh. The National Survey for Wales (NSW) and the Annual Population Survey (APS) also collect information about respondents' Welsh speaking ability and frequency of use (the NSW only collects information for those aged 16 or over while the APS collects information for those aged three and over like the census). Estimates of Welsh language ability from household surveys are historically higher than those produced by the census and it is not known exactly why this is the case. It's likely that differences in how these surveys and the census are carried out affect the estimates. More information can be found in a [blog post by the Chief Statistician](#)¹³ discussing Welsh language data.

¹² [StatsWales: Welsh speakers by local authority, gender and detailed age groups, 2011 census](#)

¹³ [Chief Statistician's update: a discussion about the Welsh language data from the Annual Population Survey](#)

Meanwhile, data from the [Annual Population Survey](#)¹⁴ shows that an estimated 33.6 per cent of the region’s residents over the age of three reported being able to speak Welsh in the year ending June 2018. This represented approximately a 6.1 percentage point increase on data for the year ending June 2008, the highest proportional increase of the Welsh regions over this period. Ceredigion was the authority with the highest proportion of Welsh speakers in the region in June 2018, with a rate of approximately 58.8 per cent of persons over the age of three saying they could speak Welsh. Neath Port Talbot was the authority with lowest rate over the same period, standing at an estimated 22.5 per cent. Regional percentages have been calculated from published rounded data.

Figure 10: Student enrolments to Higher Education Institutions in Mid and South West Wales, 2016-17



Source: Higher education student record, Higher Education Statistics Agency

In 2016-17, there were nearly 42,000 [enrolments on Higher Education \(HE\) courses](#)¹⁵ in Mid and South West Wales, representing over 30 per cent of student enrolments in Wales. Swansea University saw the highest number of HE enrolments in the region, representing around 50 per cent of total enrolments in the region. Please note that percentages have been calculated from published rounded figures.

¹⁴ [StatsWales: Annual Population Survey estimates of persons aged 3 and over who say they can speak Welsh by local authority and measure](#)

¹⁵ [StatsWales: Student enrolments in Wales by institution, level and mode of study](#)

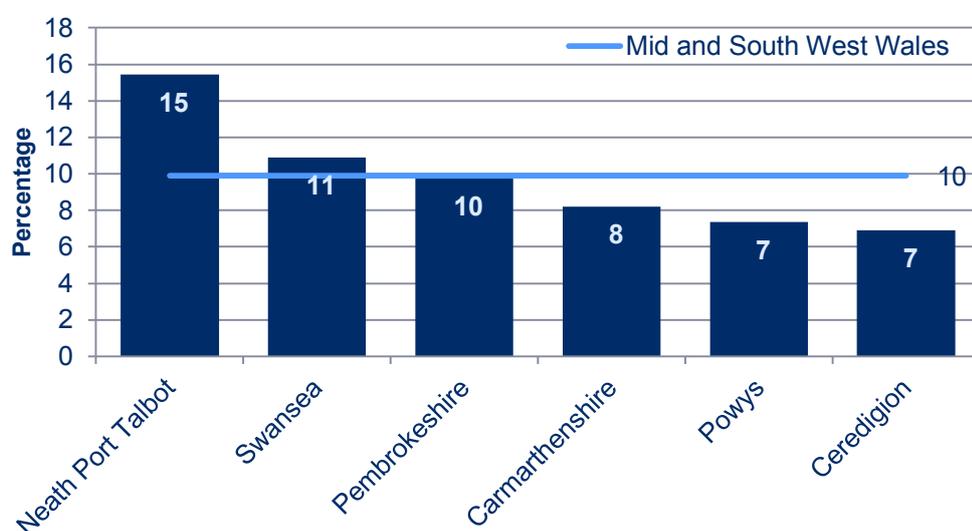
Health

Life expectancy is a measure of how long, on average, people can expect to live using estimates of the population and the number of deaths. Healthy life expectancy estimates the number of years spent in very good or good general health.

[Data from the Office for National Statistics](#)¹⁶ shows that in Mid and South West Wales from 2015-2017, Powys and Ceredigion jointly had the highest female life expectancy for this period.

Ceredigion was the local authority with the highest healthy life expectancy at birth for males, and Powys had the highest male life expectancy at birth and healthy female life expectancy. Across the region, the range in the percentage of life expectancy in good health was 7.3 percentage points for males, and 9.2 percentage points for females.

Figure 11: Adults aged 16 and over showing 0 or 1 healthy lifestyle behaviours, by local authority, 2016-17 and 2017-18* (age standardised)



* The 2016-17 and 2017-18 periods have been combined for data quality purposes

Source: National Survey for Wales

Across Mid and South West Wales in 2016-17 and 2017-18, 10 per cent of adults aged 16 or over showed 0 or 1 of the [five healthy lifestyle behaviours](#)^{17, 18}.

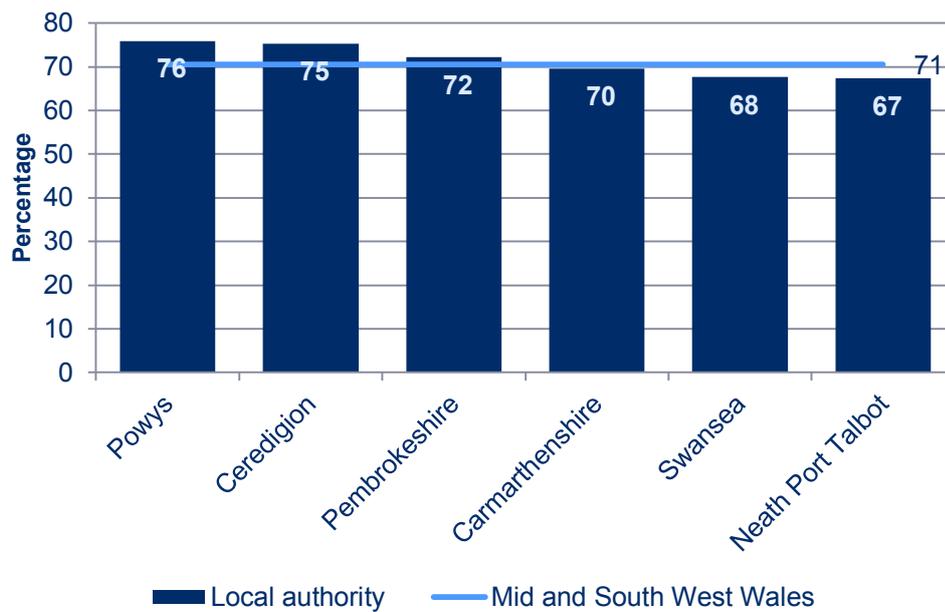
Considering local authorities within the region, Ceredigion and Powys were the authorities with the lowest percentage of reported low levels of healthy lifestyle behaviours (7 per cent), while Neath Port Talbot had the highest proportion of adults aged 16 or over showing 0 or 1 healthy behaviours (15 per cent).

¹⁶ [ONS: Health state life expectancies, UK: 2015 to 2017](#)

¹⁷ [National Survey for Wales: population health](#)

¹⁸ where healthy behaviours are not smoking, average weekly alcohol consumption 14 units or lower, eating at least 5 portions fruit & veg the previous day, having a healthy body mass index, and being physically active at least 150 minutes the previous week.

Figure 12: Percentage of adults aged 16 and over reporting they are in good or very good general health, by local authority, 2016-17 and 2017-18* (age standardised)



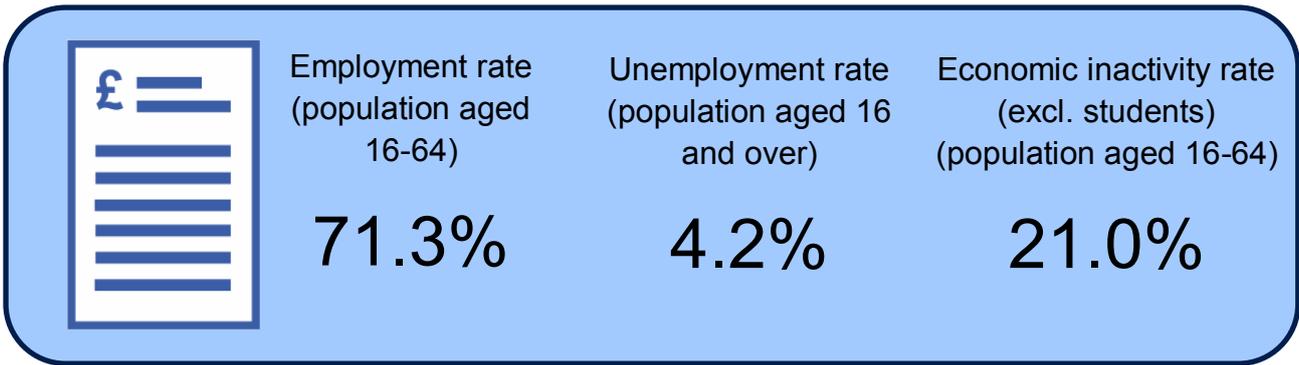
* The 2016-17 and 2017-18 periods have been combined for data quality purposes

Source: National Survey for Wales

Within the region, 71 per cent of adults aged 16 and over reported they were in [good or very good general health](#)¹⁹ in 2016-17 and 2017-18 combined. Breaking the data down by local authority, we see that Powys had the highest level of self-reported health, with 76 per cent of adults aged 16 or over reporting they were in good or very good general health. Neath Port Talbot had the lowest proportion in the region at 67 per cent.

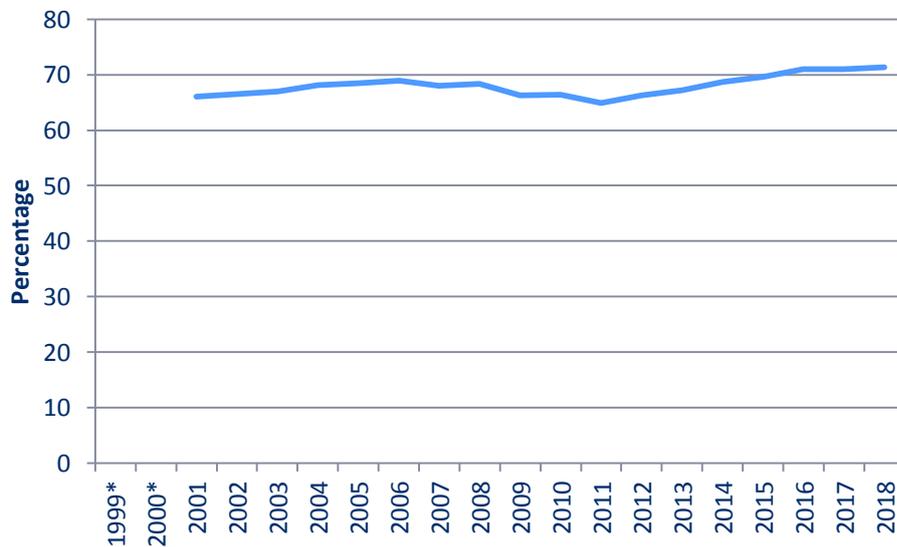
¹⁹ [National Survey for Wales: population health](#)

Employment



Source: Annual Population Survey, Office for National Statistics Data relates to year ending 30 June 2018

Figure 13: Employment rate in Mid and South West Wales, 1999-2018



Notes:

Data for 1999 to 2004 is year ending 28 February. Data from 2005 onwards is year ending 30 June.* 1999 and 2000 data for this geography level were not considered sufficiently robust for publication

Source: Annual Population Survey, Office for National Statistics

The employment level is the total number of people (aged 16+) that are in employment and the [employment rate](#)²⁰ is the percentage of the population (aged 16-64) that is in employment. Of the three regions, Mid and South West Wales had the lowest employment rate the year ending 30 June 2018.

²⁰ [StatsWales: Employment rate by Welsh local area, year and gender](#)

The region also had the greatest range in the employment rate. Powys is the local authority with the highest employment rate in the country, while Neath Port Talbot has the country's lowest employment rate. Since 2001, the region's employment rate has increased by 5.2 percentage points, though this has also varied across local authorities. In Carmarthenshire, the rate increased by 10.2 percentage points, while in Swansea, the employment rate remained relatively stable, decreasing by 0.3 percentage points.

The unemployment level is the total number of people who are unemployed and the [unemployment rate](#)²¹ is the percentage of the economically active population who are unemployed (using the International Labour Organisation's (ILO) definition of unemployment). For the year ending June 2018, the unemployment rate in Mid and South West Wales was 4.2 per cent, a decrease of 1.6 percentage points compared to 2001. Pembrokeshire's unemployment rate saw the most marked change during this period, decreasing by 3.2 percentage points since 2001, twice as much as the regional decrease. Meanwhile, for the year ending 30 June 2018, Powys had the lowest unemployment rate in Wales.

The [economic inactivity rate](#)²² is the percentage of the population who are not working and not seeking nor available to work. Economically inactive people include people looking after the family and / or home, retirees and people with a sickness or disability. For the year ending June 2018, the economic inactivity rate in Mid and South West Wales was 21.0 per cent, a decrease of 5.8 percentage points compared to 2001. This change was slightly less than the change across the whole of Wales. Carmarthenshire's economic inactivity rate saw the most marked change during this period, decreasing by 9.9 percentage points since 2001.

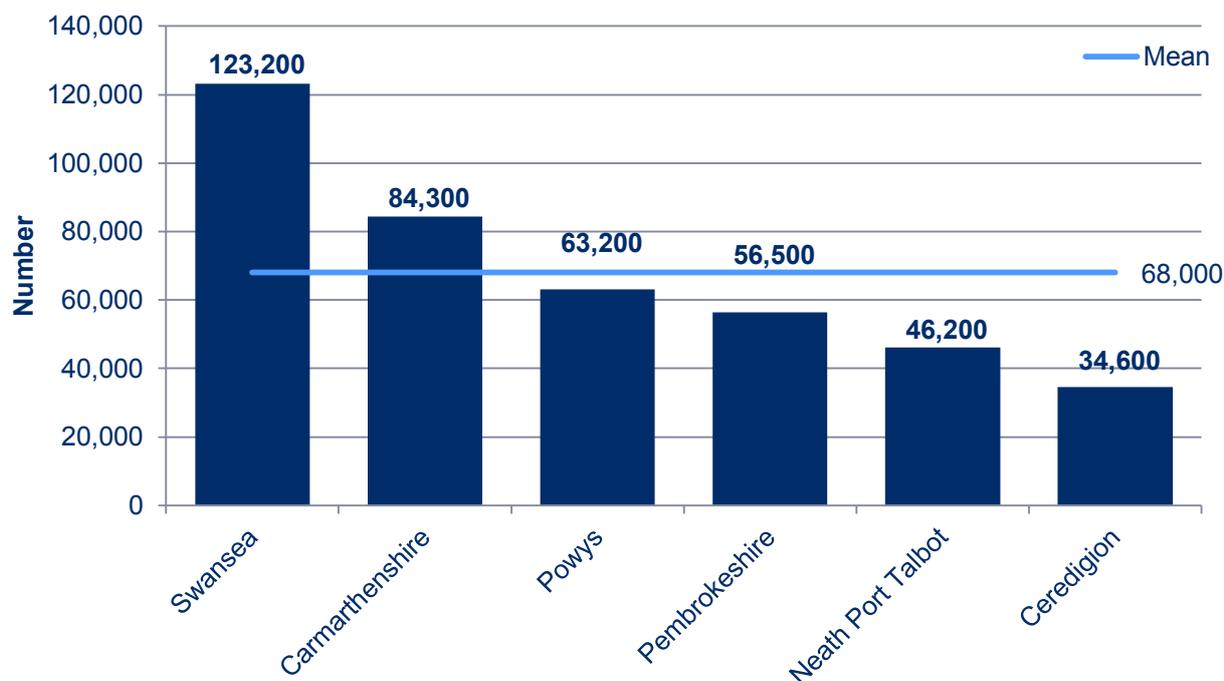
More information on regional economic statistics can be found in the [Welsh Government's regional economic and labour market profiles](#)²³.

²¹ [StatsWales: ILO unemployment rates by Welsh local areas and year](#)

²² [StatsWales: Economic inactivity rates \(excluding students\) by Welsh local area and year](#)

²³ [Welsh Government: Regional economic and labour market profiles](#)

Figure 14: Workplace employment, by local authority, 2017



Source: Annual Population Survey, Office for National Statistics; Business Register Employment Survey (BRES), Office for National Statistics

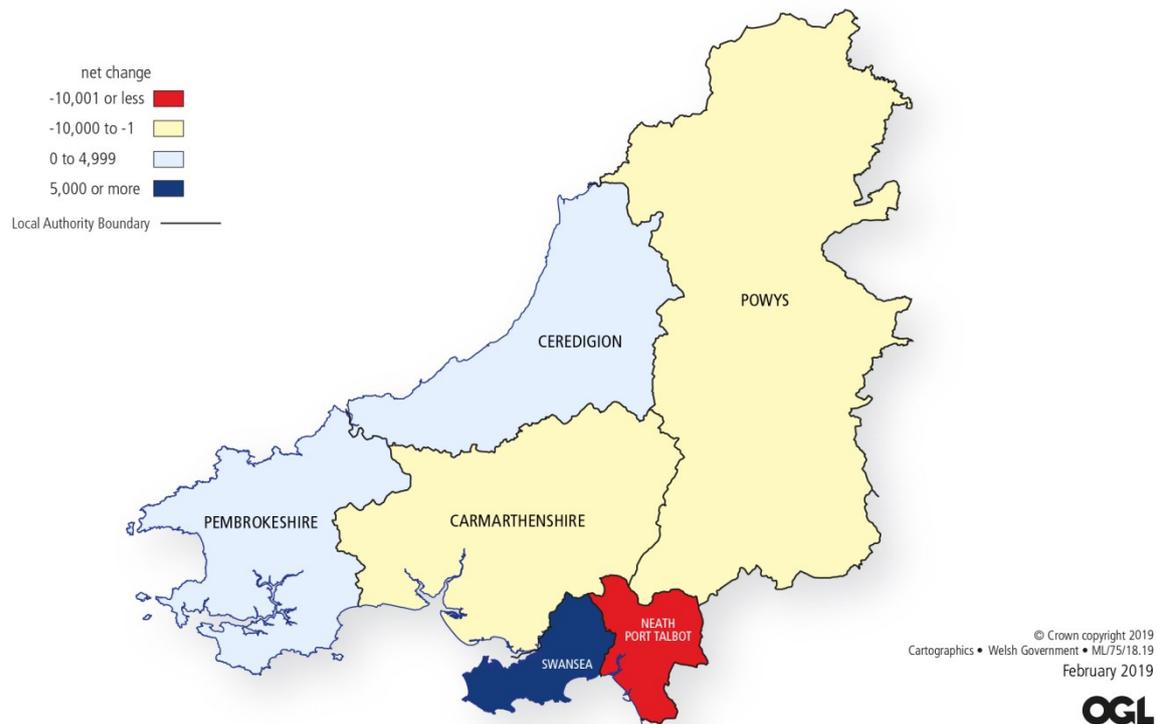
[Workplace employment data](#)^{24,25} shows that in 2017, approximately 408,000 people worked in Mid and South West Wales, over a quarter of which were based in Swansea. The average level of employment across the region's six local authorities was approximately 68,000 persons, but the median level of 59,900 persons was the highest in Wales.

The Information and communication sector saw by far the highest level of growth in workers over the 2007-2017 period, while the construction sector saw the greatest percentage decrease. When considering the number of workers however, it was the Wholesale, retail, transport, hotels and food sector that saw the greatest decrease over this period, with a decrease of around 8,000 workers in the region. Note that percentage changes are based on published rounded data.

²⁴ [StatsWales: Workplace employment by Welsh local areas and broad industry](#)

²⁵ Workplace employment data is collected from businesses through the Business Register Employment Survey (BRES), and focuses on employment and employee data. This is in contrast to the Labour Force Survey (LFS) and Annual Population Survey (APS) data, which is taken from data mainly collected from residents of private households.

Figure 15: Change in local authority populations in Mid and South West Wales due to people commuting in and out for work, 2017



Source: Annual Population Survey, Office for National Statistics

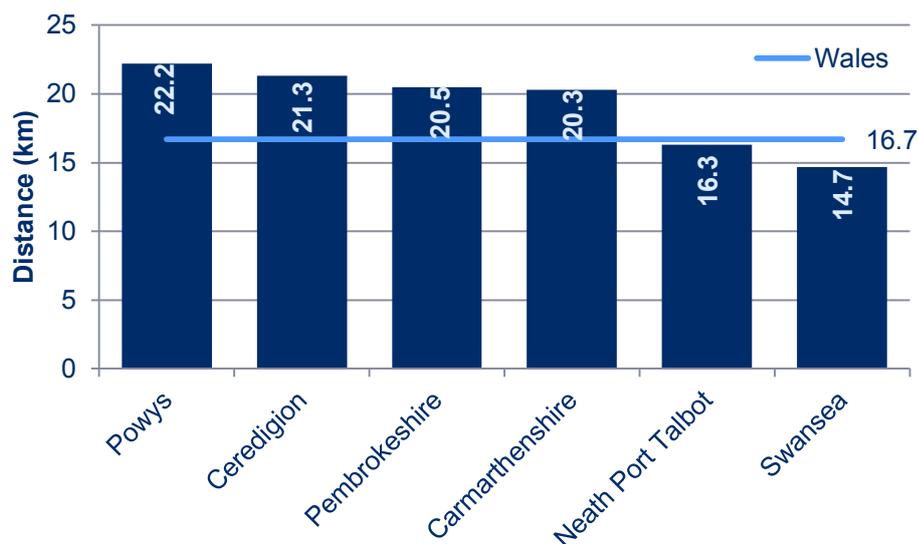
As a whole, the net change in workers across the region was -8,000, indicating that more people commute out of the region than into the region. This includes [commuting across the Welsh border](#)²⁶ into areas such as Shropshire and Herefordshire. Note that net changes and data for the regions have been calculated from published rounded data.

Data from 2017 indicates that the [net worker population change](#)²⁷ was negative in half of the region's local authorities, meaning that in these authorities, more people commute out of the authority to work than commute in from other authorities. Swansea, the most populous local authority in the region, had the greatest influx of workers from other local authorities, while the second and third most populous local authorities, Carmarthenshire and Neath Port Talbot, saw the greatest outflow of workers.

²⁶ [StatsWales: Detailed commuting patterns in Wales by Welsh local authority](#)

²⁷ [StatsWales: Commuting patterns by Welsh local authority and measure](#)

Figure 16: Average distance travelled to work (km) by workers aged 16-74 in 2011, by local authority of residence



Source: 2011 Census, Office for National Statistics

[2011 Census data](#)²⁸ shows that, on average, working residents aged 16-74 in all local authorities in the region, except in Neath Port Talbot and Swansea, had longer distances to commute to work than the Wales average. Powys residents had the longest commutes to work in terms of distance. The region had the smallest range in average commuting distance of any of the Welsh regions.

As in the rest of the country, [2018 data](#)²⁹ shows that the vast majority of enterprises had fewer than 10 employees. The proportion of microenterprises in Mid and South West Wales was higher than anywhere else in the country, whereas the proportion of large enterprises was lower. Percentages are based on rounded data.

In half of the local authorities in the region in the year ending 31st December 2017, the proportion of [men and women aged 18-64 with no qualifications](#)³⁰ was higher than the Wales figure, and 3 of these local authorities, Pembrokeshire, Carmarthenshire and Neath Port Talbot, also had a lower proportion of men and women aged 16-64 qualified to NQF level 2 or above than the Wales figure of 78.5 per cent.

²⁸ [ONS: 2011 Census Analysis, Distance Travelled to Work](#)

²⁹ [StatsWales: Enterprises by industry \(SIC2007\), size-band and area](#)

³⁰ [StatsWales: Highest qualification level of working age adults by region and local authority](#)

Transport

Figure 17: Transport Infrastructure in Mid and South West Wales



Source: Ordnance Survey

Mid and South West Wales' transport infrastructure includes the end of the M4 motorway, as well as 5 of the 9 ports in Wales – more than in either of the other Welsh regions. There are also 2 ferry ports (Fishguard and Pembroke Dock) in the region.

Milford Haven is the [largest port in Wales](#)³¹ and the fourth largest port in the UK by volume of freight, predominantly through oil and gas traffic. It handled 32.0 Mt of traffic in 2017, which was 6.6 per cent of the UK total for 2017. Freight traffic at Milford Haven accounts for 62.0 per cent of all Welsh port traffic.

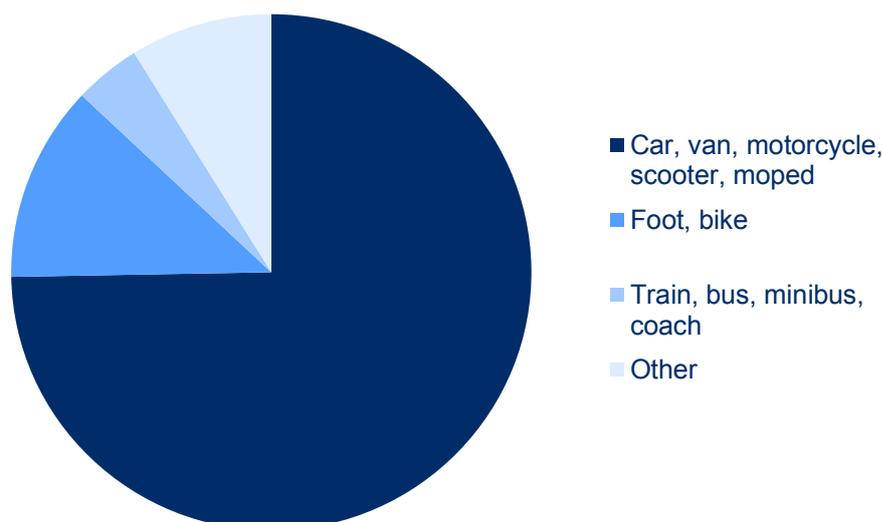
The second most important port in Wales is Port Talbot, which imports iron ore and coal mostly for the adjacent steelworks.

[Research into M4 average speeds](#)³² shows that from April to June 2016, the M4 through Neath Port Talbot had the slowest average speeds in the region during peak times.

³¹ [Welsh Government: Sea transport \(2017\)](#)

³² [Welsh Government: Vehicle speeds on Welsh motorways: April to June 2016](#)

Figure 18: Methods of travel to work among employed Mid and South West Wales residents aged 16-74, 2011



Source: 2011 Census, Office for National Statistics

According to [census data from 2011](#)³³, 74.7 per cent of workers aged 16-74 living in Mid and South West Wales travelled to work by car, van, motorcycle, scooter or moped. This corresponded to around 293,000 persons across the region. 12.3 per cent (48,000 persons), travelled on foot or by bike. 4.1 per cent (16,000 persons) travelled by train, bus, minibus or coach.

In 2017-18 across Mid and South West Wales, adults aged 16 and over in Swansea were most likely to [walk for more than 10 minutes as a means of transport](#)³⁴, with 73 per cent doing so at least once a month. Carmarthenshire was the local authority where this was least likely (51 per cent). In the same period, the local authority with the highest percentage of adults aged 16 and over using a bicycle as a means of transport at least once a month was Ceredigion (17 per cent). The lowest regular bicycle usage was in Carmarthenshire (4 per cent).

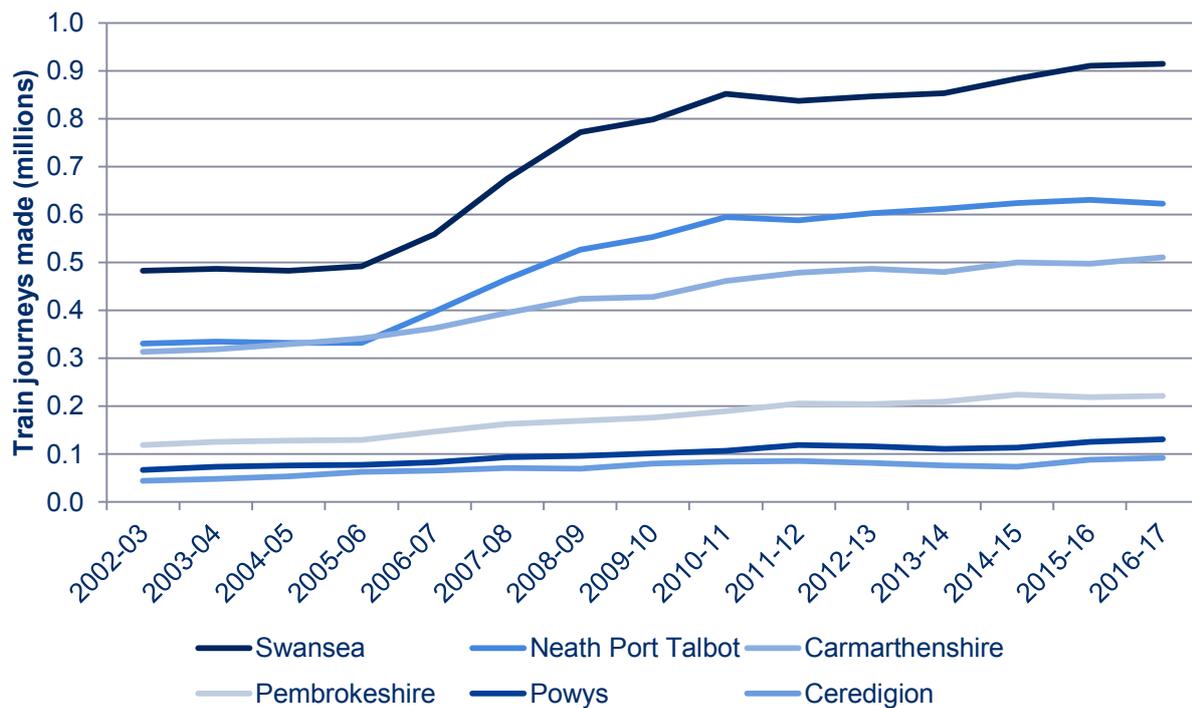
In 2016-17, a majority of secondary school pupils in Neath Port-Talbot travelled to school by car (51 per cent). They, alongside pupils from the local authority of Swansea, were also the most likely in the region to walk on their own or with other children (28 per cent each). In the 4 other local authorities in the region, a majority of pupils took a school bus.

Looking at primary school pupils in the region over the same period, pupils were mainly split between travelling to school by car and walking. Pembrokeshire pupils were most likely to travel by car (76 per cent) and Swansea pupils were least likely (51 per cent). Considering walkers, the proportion was highest in Swansea (51 per cent) and lowest in Ceredigion (21 per cent).

³³ [Nomis, ONS: Method of travel to work \(Table QS701EW\)](#)

³⁴ [Welsh Government: Active Travel: walking and cycling \(April 2017 to March 2018\)](#)

Figure 19: Rail journeys made in Mid and South West Wales over time, by local authority



Source: National Rail Trends, Regional User Profiles, Office of Rail and Road

Across the region, the [number of train journeys](#)³⁵ made in 2016-17 was almost 2.5 million, an increase of almost 875,000 on 2006-07. The number of train journeys increased by 63.4 per cent in Swansea over this ten-year period, accounting for 40.6 per cent of the regional increase in train journeys. Both figures were greater than in any other local authority in the region. Swansea also had the highest share of rail journey starts and/or ends in the authority in Mid and South West Wales in 2016-17, at 36.7 per cent.

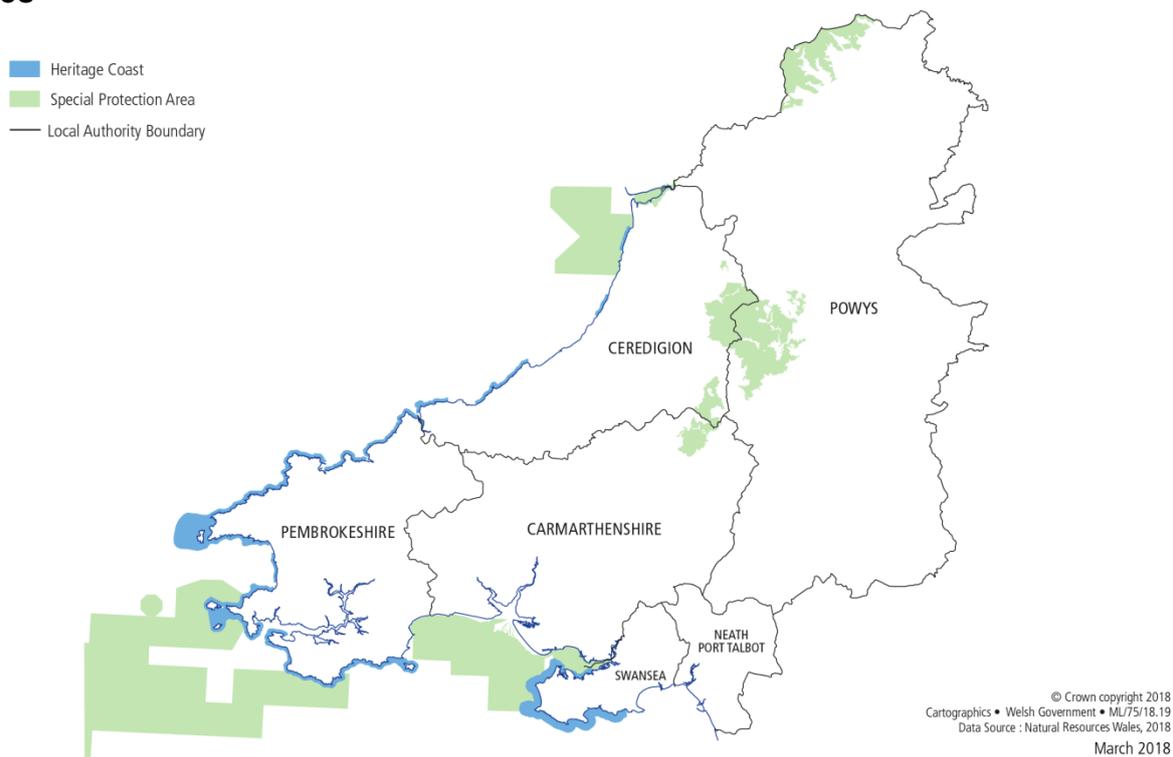
In 2016-17, there were 61 [rail stations](#)³⁶ in Mid and South West Wales. 2 of these, Swansea and Neath stations were among the 20 busiest in Wales by station entries and exits.

³⁵ [StatsWales: Rail passenger journeys by Local Authority and year](#)

³⁶ [Welsh Government: Rail station usage \(April 2016 to March 2017\)](#)

Environment

Figure 20: Heritage Coast and Special Protection Areas in Mid and South West Wales



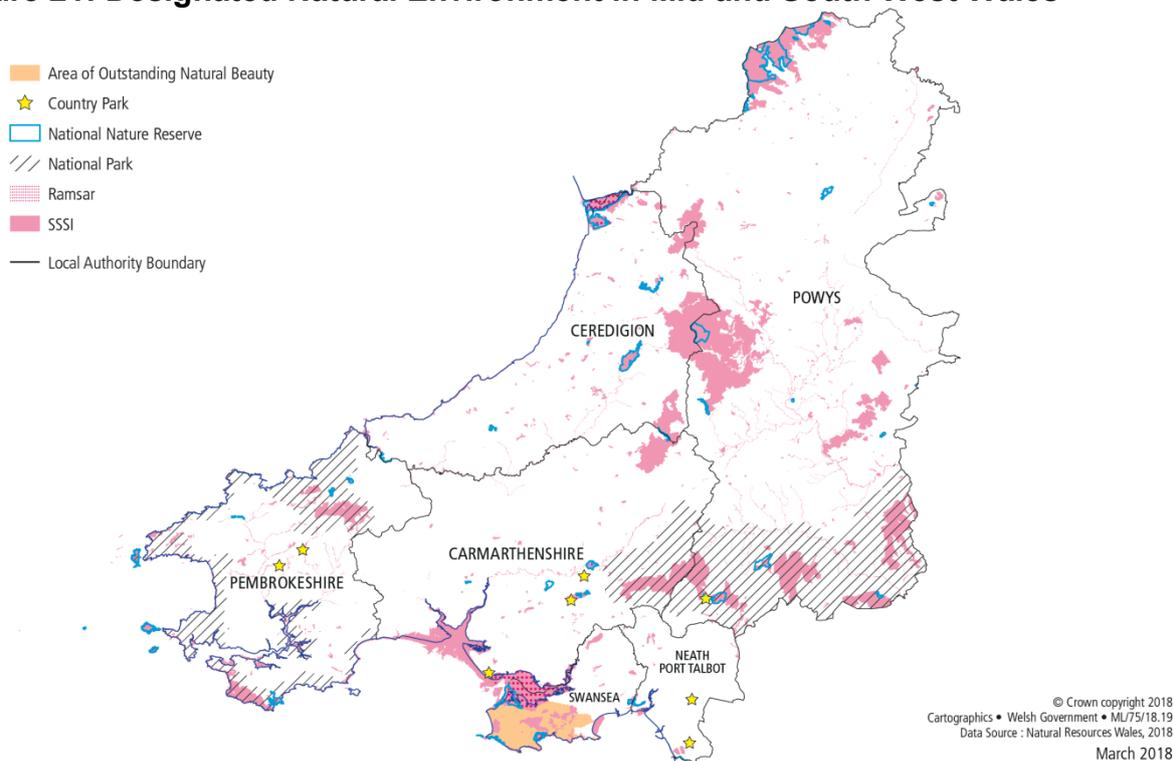
Source: Natural Resources Wales

In Mid and South West Wales, Gower, South Pembrokeshire, Marloes and Dale, St Brides Bay, St. David's Peninsula, Dinas Head, St. Dogmaels and Moylgrove, and Ceredigion coastlines have been designated as [Heritage Coasts](#)³⁷ in order to protect them from insensitive developments. The region is also home to the [Special Protection Areas \(SPAs\)](#)³⁸ of Ramsey and St David's Peninsula Coast; Castlemartin Coast; Skomer, Skokholm and the Seas off Pembrokeshire; Grassholm; Carmarthen Bay; Burry Inlet; Elenydd-Mallaen; and Dyfi Estuary, as well as sections of the Berwyn and Northern Cardigan Bay SPAs. These serve to protect bird species which are either rare or vulnerable, or which, in the case of migratory birds, visit Welsh shores regularly.

³⁷ [Lle: Heritage Coasts](#)

³⁸ [Lle: Special Protection Areas \(SPA\)](#)

Figure 21: Designated Natural Environment in Mid and South West Wales



Source: Natural Resources Wales

Mid and South West Wales is home to the Pembrokeshire Coast and Brecon Beacons [National Parks](#)³⁹, as well as Gower, which has been designated an [Area of Outstanding Natural Beauty \(AONB\)](#)⁴⁰.

Air Quality

Neath Port Talbot had the highest concentration of [nitrogen dioxide](#)⁴¹ in the air in the region in 2017 (10 µg/m³), and the lowest observed concentration was 4 µg/m³ in Ceredigion, as well as in Powys. The observed concentration reduced in all local authorities across the region since 2007.

Energy

In Mid and South West Wales in 2017, there was 1,514 megawatts (MW) of [low-carbon energy capacity](#)⁴², representing 41 per cent of the Wales total, more than either of the other Welsh regions. Swansea was the local authority with the lowest low-carbon energy capacity in the region (62 MW). Each of the other local authorities in this region had a low-carbon energy capacity between 245MW and 358MW. There were a total of approximately 24,900 low-carbon energy projects across the region in 2017. While a large proportion (80 per cent) were for solar energy (photovoltaic or thermal), 64 per cent of Wales' onshore wind projects, 62 per cent of Wales' biomass projects and 54 per cent of Wales' heat pump projects were based in the region.⁴³

³⁹ [Lle: National Parks](#)

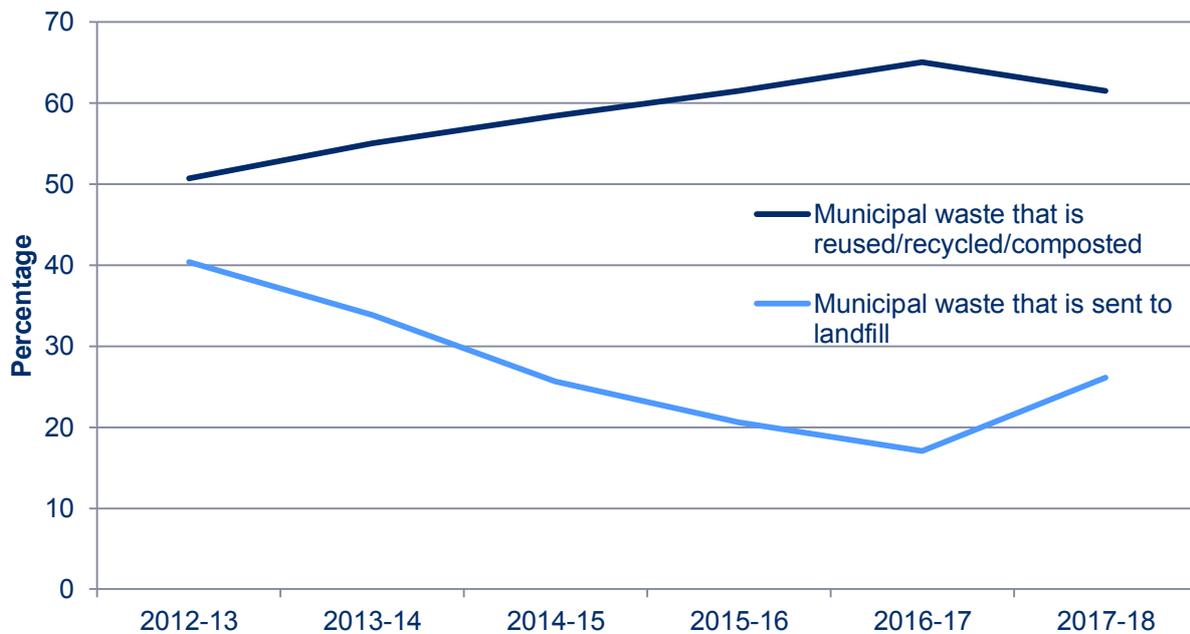
⁴⁰ [Lle: Areas of Outstanding Natural Beauty \(AONB\)](#)

⁴¹ [StatsWales: Air Quality Indicators, by Local Authority](#)

⁴² [StatsWales: Low Carbon Energy Generation by Local Authority and Technology](#)

⁴³ (r) This paragraph was revised on 23/08/2019

Figure 22: Municipal waste treatment in Mid and South West Wales



Source: WasteDataFlow, Natural Resources Wales

In 2017-18, the amount of [local authority municipal waste](#)⁴⁴ that was reused, recycled or composted was 62 per cent in Mid and South West Wales, compared to 51 per cent in 2012-13, the earliest year for which directly comparable data is available.

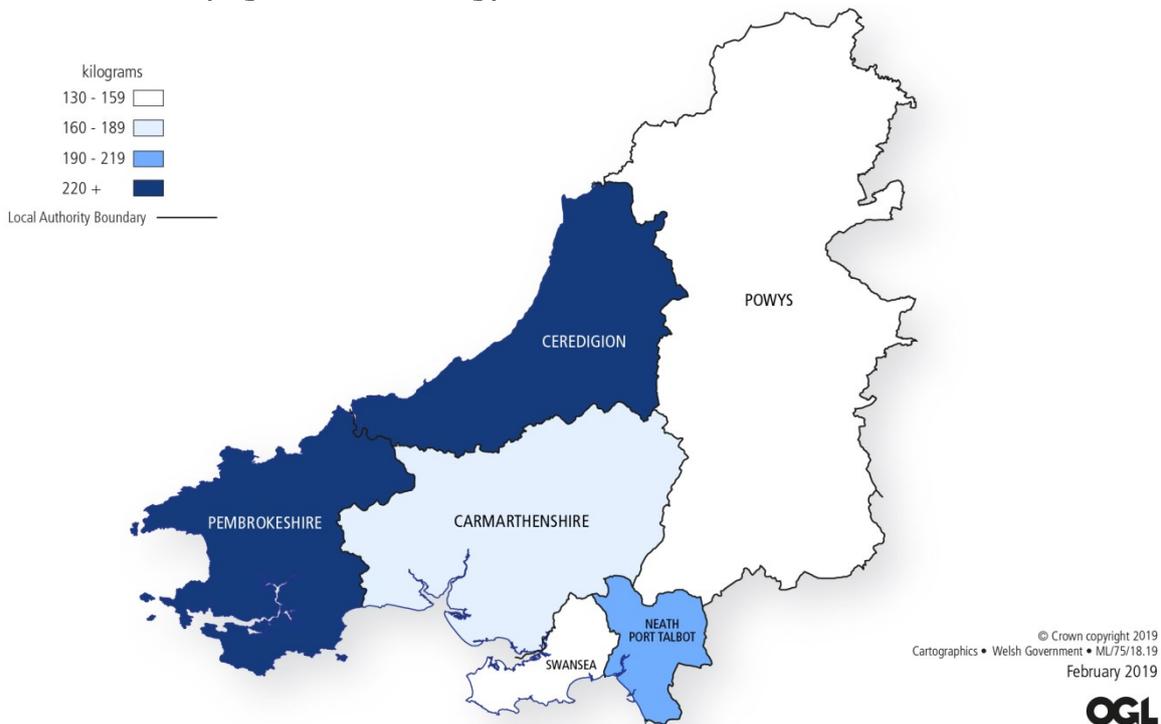
The reported reuse, recycling and composting rate varied across local authorities, from 57 per cent in Pembrokeshire, to 64 per cent in Ceredigion and Carmarthenshire.

The amount of local authority municipal waste sent to [landfill](#)⁴⁵ was 26 per cent in Mid and South West Wales in 2017-18, compared to 40 per cent in 2012-13.

⁴⁴ [StatsWales: Annual reuse/recycling/composting rates by local authority](#)

⁴⁵ [StatsWales: Annual management of waste by management method](#)

Figure 23: Annual residual household waste produced per person (kg) in Mid and South West Wales, by local authority, 2017-18



Source: WasteDataFlow, Natural Resources Wales

The [annual residual household waste](#)⁴⁶ generated across Mid and South West Wales in 2017-18 ranged from 130kg in Swansea to 242kg in Pembrokeshire. Powys saw the greatest reported change in residual household waste generated per person since 2012-13, with a reported reduction of 46 per cent, or 113kg per person. Meanwhile, Ceredigion residents produced on average 61kg more residual household waste in 2017-18 than in 2012-13.

⁴⁶ [StatsWales: Annual residual household waste produced per person \(kilograms\) by local authority](#)

Prosperity

Gross Value Added (GVA) is the value generated by any unit engaged in the production of goods and services. GVA per head is a useful way of comparing regions of different sizes. It is not, however, a measure of regional productivity.

It should be noted that regional GVA figures are subject to limitations, as they can be affected by the impact of factors such as commuting between regions, and differences between regions in demography and types of employment. Further information on this can be found in the following [ONS blog post](#)⁴⁷. In addition, note that the regional figures are apportioned from national totals based on regional indicators. The regional indicators, which include administrative and survey data, are regarded as the most appropriate sources, but may result in imperfect regional allocations.

In Mid and South West Wales, [GVA per head](#)⁴⁸ was £17,616 in 2017⁴⁹; the lowest of the three Welsh regions. All of the local authorities across the region had GVA per head levels that were lower than both the Wales and UK GVA per head values. Swansea had the highest GVA per head in the region (£19,321), and Carmarthenshire had the lowest (£15,870). This means that Mid and South West Wales had the smallest range of GVA per head of the three economic regions in Wales. Across the region, GVA per head grew 1.2 per cent on the previous year, and 71.8 per cent since 1999. Ceredigion saw the largest percentage increase in GVA since 1999 (76.9 per cent). Whereas, Pembrokeshire saw the largest increase compared with 2016, up 7.8 per cent.

In Mid and South West Wales, [Gross Disposable Household Income \(GDHI\)](#)⁵⁰ per head was £15,573 in 2016, the lowest of the three Welsh economic regions. GDHI per head was highest in Powys (£16,303), and lowest in Swansea (£14,911). Across the region, GDHI per head grew by 0.2 per cent on the previous year, and 57.6 per cent since 1999.

In Mid and South West Wales, the [median gross weekly earnings](#)⁵¹ of full-time employees in 2017 (the most recent available regional aggregated data) was £484.90, with median earnings across local authorities ranging from £446.70 in Pembrokeshire to £568.10 in Neath Port Talbot, the only local authority in Wales where earnings exceeded the UK median. In 2018, median earnings grew in all local authorities across the region except in Carmarthenshire, where median earnings decreased by 2.8 per cent, or £14.30. The lowest median earnings were in Pembrokeshire (£457.30), and the highest in Neath Port Talbot (£586.70). Swansea saw the largest percentage increase in median earnings between 2017 and 2018, up 6.9 per cent (£32.80).

⁴⁷ [National Statistical, ONS: Mind the gap: why the UK might not be the most regionally unequal country](#)

⁴⁸ [StatsWales: Gross Value Added by measure, Welsh economic region and year](#)

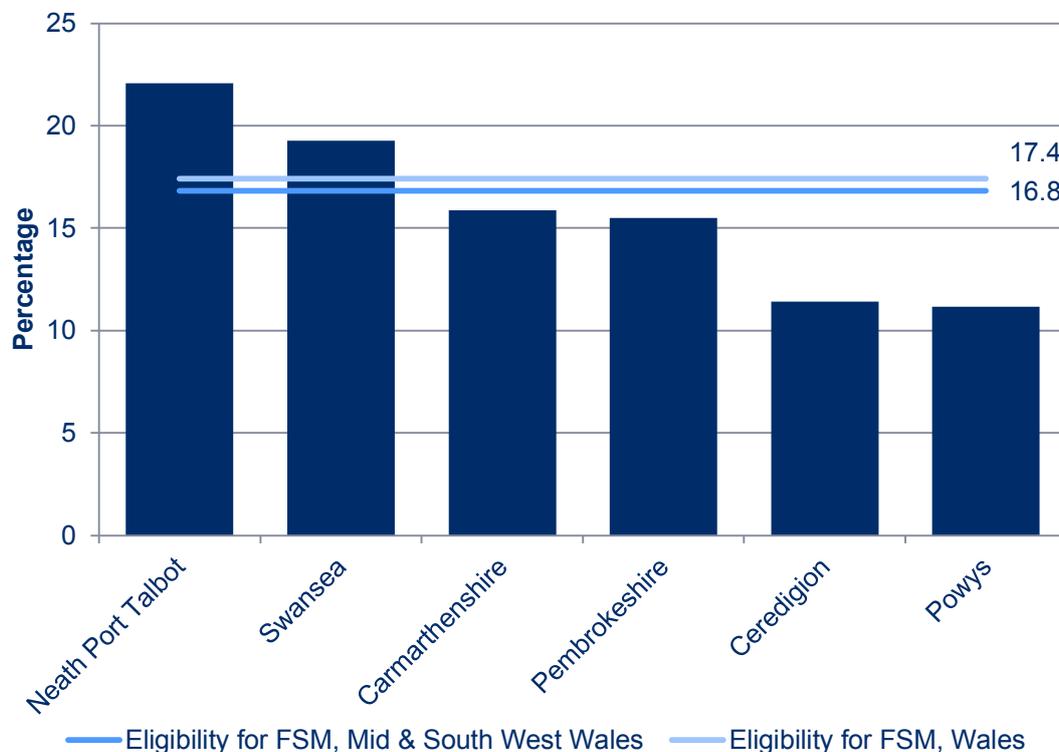
⁴⁹ Data included is the balanced approach for GVA

⁵⁰ [StatsWales: Gross Disposable Household income by measure, Welsh economic region and year](#)

⁵¹ [StatsWales: Average \(median\) gross weekly earnings by Welsh local areas and year \(£\)](#)

[ONS data](#)⁵² estimates the proportion of workers earning below the living wage (£8.75 in 2018, as defined by the Living Wage Foundation). In 2018, results show that across the region, there was a 12.0 percentage point range between local authorities, the lowest percentage being 22.6 per cent in Powys, and the highest being 34.6 per cent in Pembrokeshire. Please note that these local authority estimates vary in quality, mainly reflecting the size of the samples.

Figure 24: Free school meal (FSM) eligibility among pupils aged 5-15 in Mid and South West Wales, by local authority, 2017-18



Source: Pupil Level Annual School Census (PLASC), Welsh Government

In Mid and South West Wales, 16.8 per cent of pupils aged 5-15 were [eligible for free school meals](#)⁵³ in 2017/18, up 0.8 percentage points over the previous 10 years. The highest rate was in Neath Port Talbot (22.1 per cent), while the lowest was in Powys (11.2 per cent). Neath Port Talbot saw a 1.8 percentage point increase in eligibility compared to 2007/08, more than elsewhere in the region.

⁵² [ONS: Annual Survey of Hours and Earnings \(ASHE\) - Estimates of the number and proportion of employee jobs with hourly pay below the living wage, by work geography, local authority and parliamentary constituency, UK, April 2017 and April 2018](#)

⁵³ [StatsWales: Pupils aged 5-15 eligible for free school meals by local authority, region and year](#)

Welsh Index of Multiple Deprivation

The [Welsh Index of Multiple Deprivation \(WIMD\)](#)⁵⁴ is the Welsh Government's official measure of relative deprivation for small areas in Wales. It is designed to identify those small areas where there are the highest concentrations of several different types of deprivation. Deprivation is the lack of access to opportunities and resources which we might expect in our society. This can be in terms of material goods or the ability of an individual to participate in the normal social life of the community.

The Mid and South West Wales region contains 547 Lower Super Output Layers (LSOAs). This is 29 per cent of all the LSOAs within Wales.

Considering the 191 most deprived LSOAs across all of Wales in 2014 – i.e. the 10 per cent most deprived, 41 of them are within Mid and South West Wales. This is 7 per cent of all LSOAs within the region, and 21 per cent of the 10 per cent most deprived LSOAs across all of Wales.

Please note that WIMD is due to be updated in November 2019, including an online tool providing further statistical breakdowns by Welsh economic region.

Enterprises

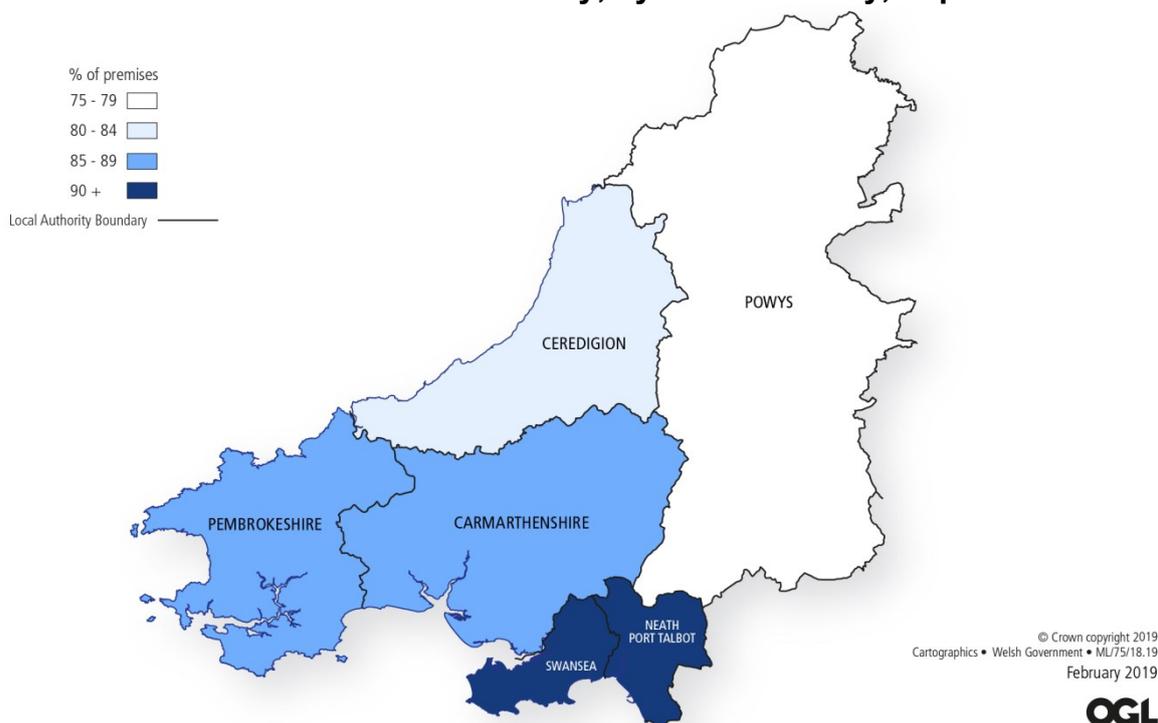
In Mid and South West Wales, 93.3 per cent of [businesses founded in 2012](#)⁵⁵ survived their first year, and 46.0 per cent were still operating after five years. The highest business survival rate in the area for businesses founded in 2012 was in Ceredigion, but it was also the region where the lowest number of businesses were started. Percentages have been calculated from published rounded figures.

⁵⁴ [Welsh Index of Multiple Deprivation](#)

⁵⁵ [StatsWales: Business Survival Rates by area and survival year](#)

Digital Infrastructure

Figure 25: Percentage of homes and businesses in Mid and South West Wales with superfast or ultrafast broadband availability, by local authority, September 2018



Source: Connected Nations Report, the Office of Communications

In Mid and South West Wales in September 2018, access to a [superfast fixed broadband speed \(30Mbit/s or higher\) or an ultrafast fixed broadband speed \(300 Mbit/s or higher\)](#)⁵⁶ was 89 per cent, ranging from 77 per cent in Powys to 98 per cent in Swansea.

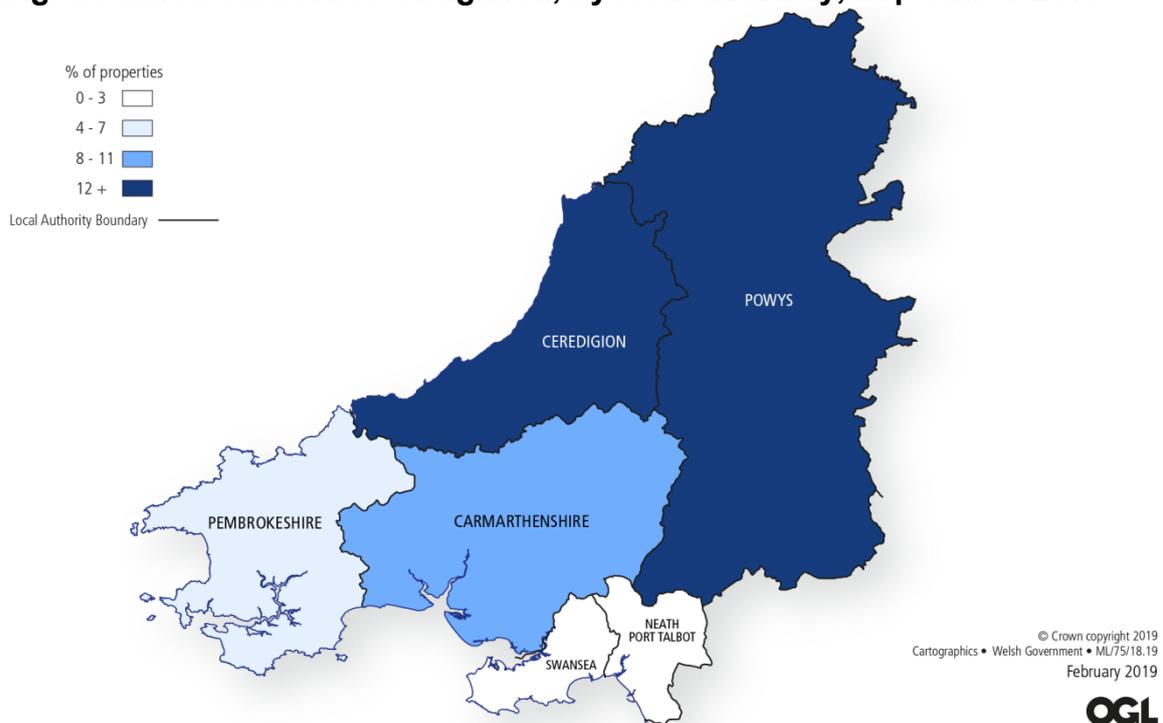
In September 2018, 35 per cent of homes and businesses had access to an ultrafast fixed broadband speed (300Mbit/s or higher). This was 14 percentage points lower than the UK rate of 49 per cent in September 2018. Access ranged from 5 per cent in Pembrokeshire, to 75 per cent in Swansea.

8 per cent of homes and businesses across the region had access to [full fibre services](#)⁵⁷ in September 2018, this was higher than the UK and Wales averages. Full-fibre broadband uses fibre-optic cables to connect homes and businesses to the street cabinet, replacing copper connections. Full-fibre connections provide a better and more reliable service that can deliver speeds of up to one gigabit per second.

⁵⁶ [Ofcom: Connected Nations 2018](#)

⁵⁷ [Ofcom: Building a full-fibre future](#)

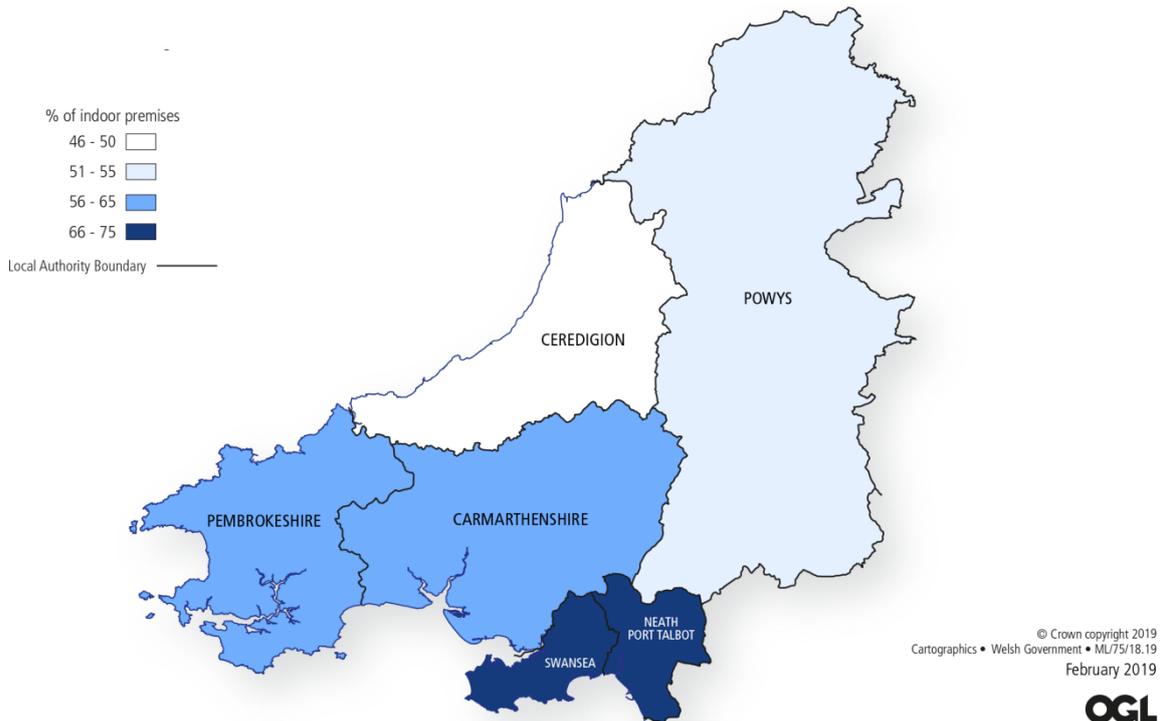
Figure 26: Percentage of homes and businesses in Mid and South West Wales not meeting the Universal Service Obligation, by local authority, September 2018



Source: Connected Nations Report, the Office of Communications

Around 26,000 homes and businesses across the region, or 6 per cent, did not meet the Universal Service Obligation minimum in September 2018, meaning that they were unable to access a download speed of 10Mbit/s and an upload speed of 1Mbit/s. This proportion was above both the UK average (2 per cent) and the Wales average (3 per cent).

Figure 27: Percentage of homes and businesses in Mid and South West Wales with indoor 4G coverage from all four network providers, by local authority, September 2018



Source: Connected Nations Report, the Office of Communications

Looking at 4G services, the percentage of homes and businesses in Mid and South West Wales that had indoor coverage from all four operators in September 2018 ranged from 48 per cent in Ceredigion to 74 per cent in Swansea. The UK average was 77 per cent and the Wales average was 69 per cent.

In terms of geographic coverage, 16 per cent of Ceredigion's area was not covered by any operator, more than in any other local authority in the region. However in Swansea, geographic area not covered was 1 per cent.

Figure 28: Percentage of homes and businesses in Mid and South West Wales with indoor voice call coverage from all four network providers, by local authority, September 2018



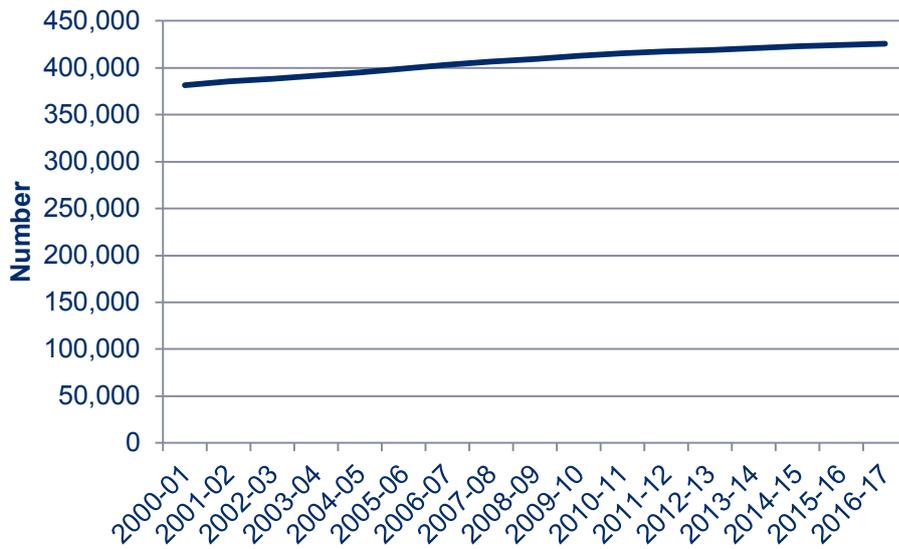
Source: Connected Nations Report, the Office of Communications

For telephone call services in Mid and South West Wales, the percentage of homes and businesses with indoor coverage from all four operators in September 2018, ranged from 69 per cent in Ceredigion to 94 per cent in Neath Port Talbot.

In half of local authorities in the region (Pembrokeshire, Swansea and Neath Port Talbot), the percentage of Mid and South West Wales' geographic area not covered by any operator was 1 per cent or lower, though in Ceredigion this was 9 per cent.

Housing

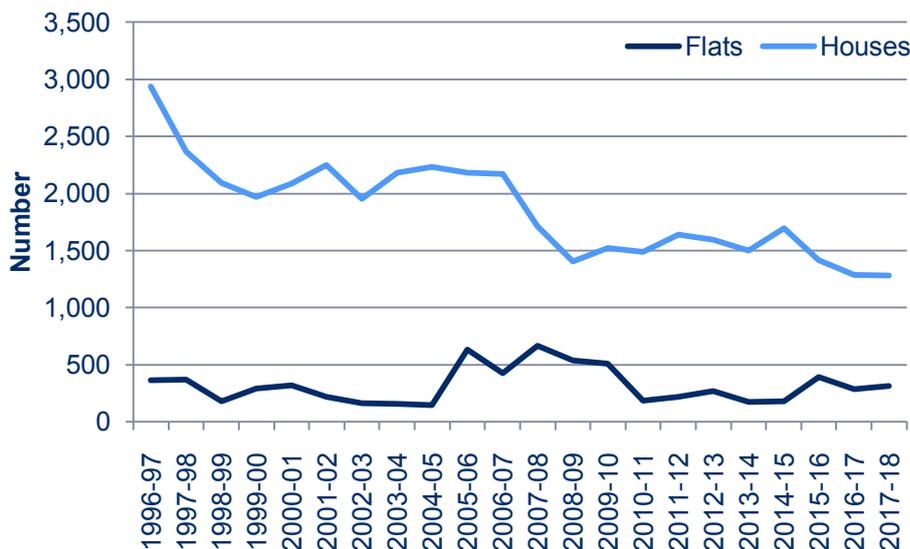
Figure 29: Dwelling stock estimates in Mid and South West Wales over time (all tenures)



Source: Dwelling Stock Estimates, Welsh Government

The total number of [dwellings](#)⁵⁸ in Mid and South West Wales continues to grow steadily with an estimated 426,000 dwellings at 31 March 2017. This represents an increase of 6 per cent over the last 10 years. Swansea was the local authority with the highest number of dwellings (111,300), and Ceredigion had the lowest number (35,300). 14 per cent of all dwellings across the region were privately rented, and 70 per cent were owner occupied, 1 percentage point lower than 5 years previously.

Figure 30: Number of new flats and houses in Mid and South West Wales completed over time



Source: New house building data collection, Welsh Government

⁵⁸ [StatsWales: Dwelling stock estimates by local authority and tenure](#)

Figure 31: Number of new dwellings completed in Mid and South West Wales over time, by tenure



Source: New house building data collection, Welsh Government⁵⁹

1,599 [new dwellings](#)⁶⁰ were completed across Mid and South West Wales over the 2017-2018 period. This is 33 per cent fewer than ten years previously and 42 per cent fewer than 20 years previously. The highest number of new dwellings completed in the 2017-2018 period was in Carmarthenshire (529, or 33 per cent) and the lowest was in Neath Port Talbot (115, or 7 per cent).

[Data from the UK House Price Index](#)^{61, 62} shows that in Mid and South West Wales in September 2018, average house prices ranged from £118,400 in Neath Port Talbot to £191,100 in Powys. Between September 2008 and September 2018, Powys was also the local authority that saw the greatest increase in house prices, rising by £25,500 (or 15.4 per cent) while Pembrokeshire saw the smallest increase, at £400 (or 0.2 per cent). This was also the smallest increase in average house prices of any Welsh local authority.

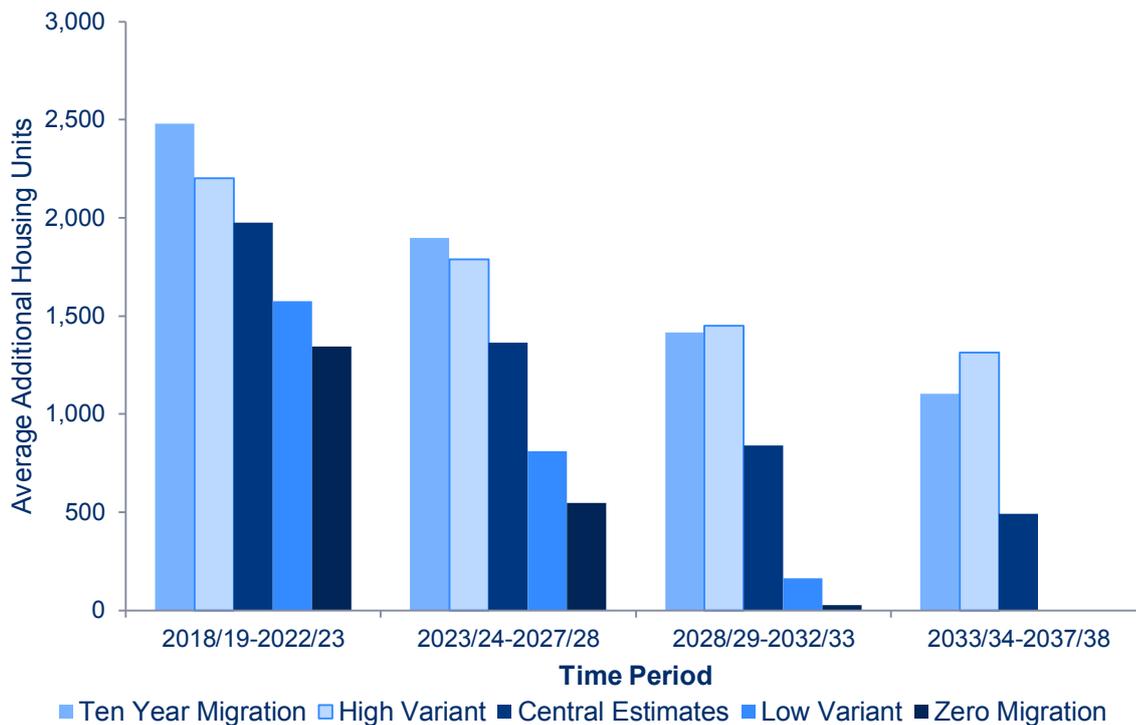
⁵⁹ The figures provided by local authorities and the National House-Building Council (NHBC) are from records kept for building control purposes. It is sometimes difficult for building control officers to identify whether a dwelling is being built for a Registered Social Landlord (RSL) or for a private developer, which may lead to an under-count of RSL new house building and an over-count for the private sector.

⁶⁰ [StatsWales: New dwellings completed by area, dwelling type and number of bedrooms](#)

⁶¹ [Land Registry: UK House Price Index](#)

⁶² Data correct as of the December 2018 publication of the UK House Price Index (UK HPI). The UK HPI is a mix-adjusted index, which mean it is weighted to reflect the actual mix of properties sold in the previous year. The UK HPI is published monthly. All figures in the UK HPI are liable to revisions for up to 12 months.

Figure 32: Average annual estimates of additional housing need, Mid and South West Wales



Source: Estimates of housing need in Wales at a national and regional level (2018-based)

[Estimates of housing need](#)⁶³ show that for the first 5-year period (2018/19-2022/23), between 1,600 and 2,500 additional housing units are required annually in Mid and South West Wales (with a central estimate⁶⁴ of 2,000). For the third period (2028/29-2032/33), the central estimate falls to 1,000 and by the mid to late 2030s (2033/34-2037/38) is less than 400. This reflects a slowdown in the projected household growth from the 2014-based household projections. Please note that housing need estimates by tenure (market and affordable) at the regional level will shortly be published on our [website](#)⁶⁵.

[2014-based household projections](#)⁶⁶ show that by 2028, there could be around 144,000 one-person households in Mid and South West Wales, a 10 per cent increase on the projected level for 2018. By 2039, the projected number is around 154,000, of which almost a third (32 per cent) would be in Swansea.

⁶³ [Welsh Government: Housing need and demand \(2018-based\)](#)

⁶⁴ Based on 2014-based household projections

⁶⁵ [Welsh Government: Housing need and demand](#)

⁶⁶ [StatsWales: Household projections by local authority, household type and year](#)

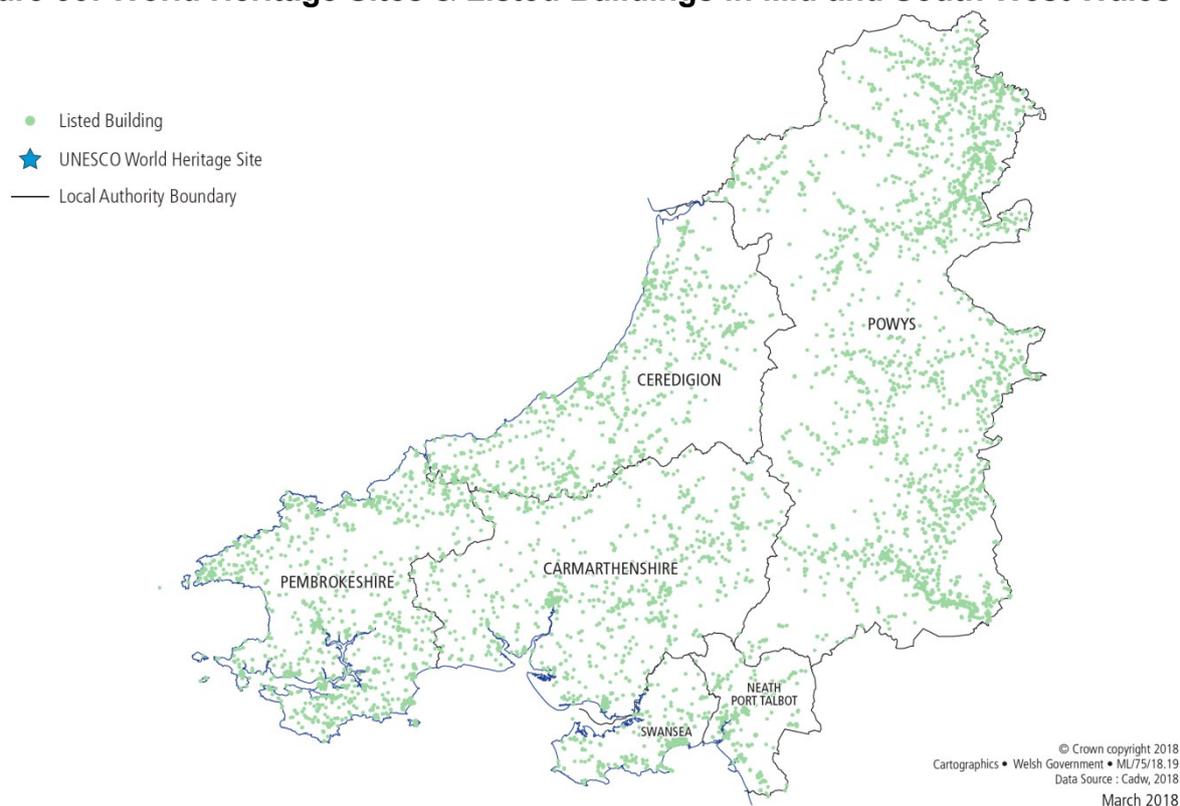
The projected average household size by 2028, ranges from 2.11 in Powys to 2.23 in Neath Port Talbot. It should be noted that these data are projections based on past trends, and should not be used as forecasts.

[Local authorities estimated](#)⁶⁷ that 68 persons were sleeping rough across Mid and South West Wales in the 2 weeks between 16th and 29th October 2017. This is an increase of two-thirds (27 persons) compared with the exercise carried out in October 2016, though the increase may have been influenced by a number of factors, including improved mechanisms for identifying rough sleepers in some local authorities. Over a third (38 per cent) of persons sleeping rough across the region were located in Swansea, though it was Neath Port Talbot that saw the greatest increase (9 persons) compared with the exercise carried out in October 2016.

⁶⁷ [StatsWales: Rough Sleepers by local authority](#)

Culture & Heritage

Figure 33: World Heritage Sites & Listed Buildings in Mid and South West Wales



Source: Cadw

Mid and South West Wales received 39 million [Tourism Day Visits \(TDVs\)](#)⁶⁸ in 2017, resulting in a total expenditure of £1.3 billion. TDVs in the region were most likely to be to small towns, villages or the countryside, more so than in the other Welsh regions.

The [Wales Accommodation Occupancy Survey](#)⁶⁹ shows that Mid and South West Wales had the lowest hotel room occupancy⁷⁰ rate of the Welsh regions in 2017.

When considering the number of [visits to tourist attractions in Wales](#)⁷¹ in 2017, 2 of the top 10 paid attractions were in Mid and South West Wales: LC Waterpark & Leisure Complex, and Folly Farm. These were also the top 2 in the country. Over the same period, 2 of the top 10 free attractions in Wales in 2017 were in Mid and South West Wales; Pembrey Country Park and St David's Cathedral.

⁶⁸ [Great Britain Day Visits Survey \(2017\)](#)

⁶⁹ [Welsh Government: Wales tourism accommodation occupancy surveys \(2017\)](#)

⁷⁰ Room occupancy is the number of bedrooms occupied over a given period as a proportion of total available bedrooms.

⁷¹ [Welsh Government: Visits to tourist attractions \(2017\)](#)

Key quality information

Relevance

This publication is a compendium of key statistics on nine different topics. As such, it brings together data that is already in the public domain at different geographical levels (e.g. Wales, local authority level). Where possible and appropriate, data has been made available at regional level to offer further context on regional differences that may exist in Wales. More information on specific data sources can be found within the individual releases, referenced in the footnotes.

This publication was initially prepared to support policy teams in Welsh Government in preparing and drafting the new [National Development Framework](#)⁷². However, we anticipate that the scope of the usefulness of this publication is further-reaching. It is anticipated that this publication will be used by Welsh Government, local authorities, other public bodies with a regional interest, and the general public, to (i) gain an overview of data collected for Wales and its local authorities and regions on each of the subject areas and (ii) understand differences that may exist between the Welsh regions. Users with a specific interest in one or more of the topics in this report can find a wider range of statistics and data on [StatsWales](#)⁷³.

Accuracy

The statistics included within this release are taken from official statistics sources, though not all of these have been classified as National Statistics. More information about official statistics and National Statistics can be found on the [UK Statistics Authority website](#)⁷⁴. Information about the quality of each of the data sources used can be found within the individual releases, referenced in the footnotes, or within the quality reports that accompany these releases.

Due to the high number of sources included in this publication and the time taken to compile it, more recent data has been published for some sources. This data was known to be the most recently available as at 11/01/2019, though revisions made to data sources, such as the Annual Population Survey (APS) and the Wales tourism performance: January to June 2018 release have been accounted for. Current data is accessible through the links to sources included in the footnotes.

We do not intend to regularly update this report. However, in future, data will be made available on StatsWales and in dashboards, and will be updated as new data is published, ensuring that users are always provided with the latest data.

⁷² [Welsh Government: National Development Framework](#)

⁷³ [StatsWales website](#)

⁷⁴ [UK Statistics Authority: types of official statistics](#)

Timeliness and punctuality

This publication has been prepared to fit in with the timing of the drafting and publication of the [National Development Framework](#). Due to the high number of sources included in this publication and the time taken to compile it, more recent data has been published for some sources. This data was known to be the most recently available as at 11/01/2019.

Accessibility and clarity

Users may access all data included in this release using the links included in the footnotes. The majority of the data underlying the report, including much more detailed breakdowns, are available on StatsWales and through the StatsWales open data services. Quality information and metadata for each of these sources is also available through these links.

This publication is currently available in printable PDF format, but in future, data will be made available as interactive online reports to maximise impact and efficiency using the Welsh Government open data services.

Comparability and coherence

Where different datasets have been used to discuss the same topic (for example in the section on statistics relating to the [Welsh language](#)), an explanation is offered as to the strengths and limitations of each of the sources, and the coherence between them, with further information provided in the sources and links.

Where possible, National Statistics have been used to ensure the data is of high quality and is consistent with statistics on the topics that may be used for other purposes. Further information on the comparability and coherence of each of the sources is available in the sources linked in the footnotes.

Well-being of Future Generations Act (WFG)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators (“national indicators”) that must be applied for the purpose of measuring progress towards the achievement of the Well-being goals, and (b) lay a copy of the national indicators before the National Assembly. The 46 national indicators were laid in March 2016 and this release includes 7 of the national indicators, namely the percentage of adults who have fewer than two healthy lifestyle indicators; levels of nitrogen dioxide (NO₂) pollution in the air; the percentage of adults with qualifications at the different levels of the National Qualifications Framework; Gross Disposable Household Income per head; the capacity (in MW) of renewable energy equipment installed; the percentage of people in employment; and the percentage of people who can speak Welsh.

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

As a national indicator under the Act they must be referred to in the analyses of local well-being produced by public services boards when they are analysing the state of economic, social, environmental and cultural well-being in their areas.

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

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

Further details

The document is available at: <https://gov.wales/summary-statistics-economic-regions-2019>

Other related links

[National Development Framework](#)

Next update

This publication is a one-off release and will not be updated. However, future data will be made available in dashboard format and will be updated as new data becomes available.

We want your feedback

We welcome any feedback on any aspect of these statistics which can be provided by email to Stats.Info.desk@gov.wales.

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