Contents

1 Introduction 1
   1.1 Study Context 1
   1.2 Stakeholder Involvement 2
   1.3 Purpose 3
   1.4 Structure 3

2 Arrangements and Attendees 4
   2.1 Details 4
   2.3 Agenda 4
   2.4 Presentation 5
   2.5 Activities 5
   2.6 Participants 6

3 Results of Activity 1 - ‘sticky-dot’ exercise 8
   3.1 Defining Rural Areas in Wales 8
   3.2 Fostering Rural Areas in Wales 9
   3.3 Additional Contributions 10

4 Results of Activity 2 - SWOT 11
   4.1 Social and Cultural 11
   4.2 Economic 13
   4.3 Environmental 15
   4.4 Summary: Regional Overview 18

Appendices

Appendix A
Mid & South West Wales Rural Workshop Presentation

Appendix B
Sticky Dot Activity Outputs

Appendix C
SWOT Activity Photos

Appendix D
Mid & South West Wales Rural – Event Register
1 Introduction

1.1 Study Context


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.

![NDF Regions](image)

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:

<table>
<thead>
<tr>
<th>Location</th>
<th>Llandeilo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Venue</td>
<td>The Plough Inn</td>
</tr>
<tr>
<td>Date</td>
<td>30\textsuperscript{th} November 2018</td>
</tr>
<tr>
<td>Time</td>
<td>13.30 – 16.00</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introductions</td>
<td>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.</td>
</tr>
<tr>
<td>The Study</td>
<td>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.</td>
</tr>
<tr>
<td>Data and trends</td>
<td>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.</td>
</tr>
<tr>
<td>Data definitions and issues</td>
<td>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.</td>
</tr>
<tr>
<td>Item</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>SWOT</td>
<td>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.</td>
</tr>
<tr>
<td>Next steps</td>
<td>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.</td>
</tr>
</tbody>
</table>

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:

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

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:

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

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
2. 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

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Cultural identity</td>
<td>• Distance to work</td>
</tr>
<tr>
<td>• Welsh language speaking areas</td>
<td>• Rail infrastructure and routing</td>
</tr>
<tr>
<td>• Early retirement age (55+) as an asset for communities</td>
<td>• Mental health</td>
</tr>
<tr>
<td>• Responsiveness and proactiveness of rural communities</td>
<td>• Service access and provision</td>
</tr>
<tr>
<td>• Lifestyle</td>
<td>• Loss of sense of communities through declining facilities or centres e.g. chapels</td>
</tr>
<tr>
<td>• Young Farmer’s movement and similar groups</td>
<td>• Patterns of travel to school – impact on health and well-being</td>
</tr>
<tr>
<td>• Strong networks in existing and longstanding communities</td>
<td>• Employment opportunities and equality</td>
</tr>
<tr>
<td>• Perceived time to reflect and make better decisions (benefit to community planning)</td>
<td>• Commuter hubs over communities</td>
</tr>
<tr>
<td>• Tourism</td>
<td>• Out-migration of young people (24-30s)</td>
</tr>
<tr>
<td>• Community-based case studies</td>
<td></td>
</tr>
<tr>
<td>OPPORTUNITIES</td>
<td>THREATS</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>• Tourism and provision of a ‘new offer’/diversification</td>
<td>• Fuel prices and the impact on the rural economy</td>
</tr>
<tr>
<td>• Community-based renewable schemes</td>
<td>• Social care for the elderly</td>
</tr>
<tr>
<td>• Social innovation and entrepreneurship</td>
<td>• 16+ access to schools</td>
</tr>
<tr>
<td>• SME business hubs</td>
<td>• Patterns of travel to school – impact on health and well-being</td>
</tr>
<tr>
<td>• Technology and transport (e.g. EVs)</td>
<td>• Employment opportunities and equality</td>
</tr>
<tr>
<td>• Resource of early retired community (55+)</td>
<td>• Commuter hubs over communities</td>
</tr>
<tr>
<td>• Improving digital accessibility and 5G</td>
<td>• Out-migration of young people (24-30s)</td>
</tr>
<tr>
<td>• Place-planning to sustain communities</td>
<td>• Brexit, including the influence of Irish ports and the connection with Europe</td>
</tr>
<tr>
<td>• Business mentorship</td>
<td></td>
</tr>
<tr>
<td>• Tourism tax</td>
<td></td>
</tr>
<tr>
<td>• Localised energy generation</td>
<td></td>
</tr>
<tr>
<td>• Location of ‘futuristic services’ due to space in rural areas</td>
<td></td>
</tr>
<tr>
<td>• New ways of working e.g. work from home</td>
<td></td>
</tr>
<tr>
<td>• Modernisation of schools</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism</td>
<td>Domination of tourism</td>
</tr>
<tr>
<td>History and heritage assets (physical and otherwise)</td>
<td>Service provision</td>
</tr>
<tr>
<td>International appeal</td>
<td>Accessibility and modal choice</td>
</tr>
<tr>
<td>Rural hubs and satellites</td>
<td>Access to services and facilities</td>
</tr>
<tr>
<td>Way of life</td>
<td>Critical mass for social infrastructure to maintain viability of settlements and communities</td>
</tr>
<tr>
<td>Sense of community</td>
<td>Seasonality of tourism</td>
</tr>
<tr>
<td>Well-being/health</td>
<td>Large land mass</td>
</tr>
<tr>
<td>Artisan skills</td>
<td>Bus passes stop at the border</td>
</tr>
<tr>
<td>Brecon historically as a growth area</td>
<td>Low wage employment</td>
</tr>
<tr>
<td>Agricultural industry</td>
<td>Transport and the need to drive</td>
</tr>
<tr>
<td>Universities</td>
<td>Ageing population demographic</td>
</tr>
<tr>
<td>Land management skills/stewardship</td>
<td>Land values – agricultural and other</td>
</tr>
<tr>
<td></td>
<td>Housing delivery, particularly affordable housing</td>
</tr>
<tr>
<td></td>
<td>Lack of housing and choice which creates challenge for retention of families</td>
</tr>
<tr>
<td></td>
<td>Diseconomy of sale</td>
</tr>
<tr>
<td></td>
<td>University of the ‘Third Age’</td>
</tr>
</tbody>
</table>
### OPPORTUNITIES

- 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

### THREATS

- 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

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism</td>
<td>Uncertainty around future of farming and knock-on effects on land management</td>
</tr>
<tr>
<td>Marine environment</td>
<td>Capacity issues within tourism</td>
</tr>
<tr>
<td>Built heritage</td>
<td>Public transport</td>
</tr>
<tr>
<td>Resources</td>
<td>Accessibility</td>
</tr>
<tr>
<td></td>
<td>Suitability of rural areas for EV infrastructure</td>
</tr>
<tr>
<td></td>
<td>Water pollution</td>
</tr>
<tr>
<td></td>
<td>Tourism ‘hot-spots’ – congestion and landscape impacts</td>
</tr>
<tr>
<td></td>
<td>Grid connectivity</td>
</tr>
<tr>
<td></td>
<td>Over-reliance on the private car</td>
</tr>
<tr>
<td>OPPORTUNITIES</td>
<td>THREATS</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>• Tourism tax to benefit local areas</td>
<td>• Industrialisation of farming – pollution slurry and environmental</td>
</tr>
<tr>
<td>• Housing</td>
<td>impact</td>
</tr>
<tr>
<td>• Reservoirs as attractions</td>
<td>• Future of agriculture vs. impact on environment</td>
</tr>
<tr>
<td>• Offshore renewable energy</td>
<td>• Water pollution</td>
</tr>
<tr>
<td>• Circular economy – using waste to benefit</td>
<td>• Fishing</td>
</tr>
<tr>
<td>• Balancing renewable energy generation with landscape</td>
<td>• Protection of non-designated areas via policy</td>
</tr>
<tr>
<td>• Community energy generation</td>
<td>• Air pollution and the carbon impacts of farming</td>
</tr>
<tr>
<td>• Major events to showcase the environment</td>
<td>• Perceptions and misconceptions of farming/agriculture operation (i.e land-based farming vs. wider activities)</td>
</tr>
<tr>
<td>• Diversification of tourism e.g. Outdoor activities as unique products – more than tourism accommodation</td>
<td>• Loss of sheep farming and impact on uplands vegetation</td>
</tr>
<tr>
<td>• Transport infrastructure for long distance travel</td>
<td>• Financing of the grid and its operation</td>
</tr>
<tr>
<td>• Energy infrastructure</td>
<td></td>
</tr>
<tr>
<td>• Car sharing and parking infrastructure</td>
<td></td>
</tr>
<tr>
<td>• Lifestyle tourism</td>
<td></td>
</tr>
<tr>
<td>• Sustainable transport</td>
<td></td>
</tr>
</tbody>
</table>
| 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
1. Introductions
2. The Study
3. Data and trends
4. Data definitions and issues

Break

5. SWOT
6. Next steps
7. Close
Introductions

- Project team
- Stakeholders
- Housekeeping
- Study
The Study

- National Development Framework (NDF)
- NDF Consultation
- Scope of Research
- NDF Regions
- Rural Areas
- Study to be completed in February 2019
# Data and Spatial Maps

<table>
<thead>
<tr>
<th>Economic</th>
<th>Social and Cultural</th>
<th>Environmental</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment</td>
<td>Population</td>
<td>National Parks</td>
</tr>
<tr>
<td>Unemployment</td>
<td>Access to services</td>
<td>Designations</td>
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<tr>
<td>GVA</td>
<td>WIMD</td>
<td>AQMAs</td>
</tr>
<tr>
<td>GDP</td>
<td>Welsh language</td>
<td>Listed Buildings</td>
</tr>
</tbody>
</table>

**Work in primary sector:**
- Fishing
- Farming
- Minerals extraction
- Mining

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<thead>
<tr>
<th>Method of travel to work</th>
<th>Flood risk areas</th>
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</thead>
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<tr>
<td>Educational attainment</td>
<td>Renewables</td>
</tr>
<tr>
<td>Road and rail</td>
<td>Agricultural land</td>
</tr>
</tbody>
</table>
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.

Characteristics – Mid & West Wales

- 6% decrease in Age 0-15
- House Prices up 11%
- 18,000 jobs in agriculture
- 24% speak Welsh
- 78 jobs for 100 people
- 14% work from home
Trends – Comparison across Welsh Regions

**Age Structure 2001-2017**

- South East Wales: 25.4%
- Mid & West Wales: 28.0%
- North Wales: 30.6%

**Employment in Agriculture**

- North Wales: 3,700 enterprises, 8,183 jobs
- Mid & West Wales: 8,300 enterprises, 18,184 jobs
- South East Wales: 1,395 enterprises, 3,329 jobs

**Annual Pay - Gross**

- North Wales: £25,486
- Mid & West Wales: £25,040
- South East Wales: £27,369

**Percentage able to speak Welsh**

- South East Wales: 31%
- Mid & West Wales: 24%
- North Wales: 11%

**House Prices 2013-2018**

- South East Wales: 20%
- Mid & West Wales: 11%
- North Wales: 14%

**Work mainly at or from home**

- South Wales: 8%
- Mid & West Wales: 14%
- North Wales: 12%
1. Indicators that could help define rural areas

2. The most important infrastructure;
   • Economic
   • Social and cultural
   • Environmental

   to 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....
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

![National Development Framework Timeline](image-url)
Thank you

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

Sticky Dot Activity Outputs
NDF
Rural Areas Workshop
Activity Pack

Mid & South West Wales
30 November 2018
### 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.

<table>
<thead>
<tr>
<th>Dangosyddion / Indicators</th>
<th>Dewisiadau / Choices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dwysedd poblogaeth / teneurwydd trefol</td>
<td><img src="image1.png" alt="Choices" /></td>
</tr>
<tr>
<td>Population density / urban sparsity</td>
<td><img src="image2.png" alt="Choices" /></td>
</tr>
<tr>
<td>Dwysedd cyflogaeth</td>
<td><img src="image3.png" alt="Choices" /></td>
</tr>
<tr>
<td>Employment density</td>
<td><img src="image4.png" alt="Choices" /></td>
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<td>Pellter i gefnffordd</td>
<td>Distance to trunk road</td>
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<td>Signal band eang</td>
<td>Broadband coverage</td>
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<tr>
<td>Maint cwmniaw / cyfran y busnesau bach a chanolig</td>
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<tr>
<td>Company size / proportion SMEs</td>
<td></td>
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</tbody>
</table>
Cyllid yr UE / Buddsoddiad cyfalaf / NUTS3
EU Funding / Capital investment / NUTS3

Tlr amaethyddol
Agricultural land

Topograffi
Topography

Livestock density

Land Use Classification (2017 map)

Farmscape / Wildscape / Marginal Fringe

LANDMAP
<table>
<thead>
<tr>
<th>Mynediad i Wasanaethau MALIC</th>
<th>WIMD Access to Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sectorau cyflogaeth gwledig</td>
<td>Rural sectors of employment</td>
</tr>
<tr>
<td>Pellter a deithiwyd i'r gwaith / ardaloe dd teithio i'r gwaith</td>
<td>Distance travelled to work / travel to work areas</td>
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</tbody>
</table>

Accessible rail travel.
Meithrin Ardalodd 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 llywddiant ardalodd 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 mhos un o’r rhesi sy’n cynrhychioli eich dewis.

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

<table>
<thead>
<tr>
<th>Mynediad i... / Access to...</th>
<th>Dewisiadau / Choices</th>
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<tbody>
<tr>
<td>Tai fforddiadwy</td>
<td><img src="image" alt="Stickers for Tai fforddiadwy" /></td>
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<tr>
<td>Affordable housing</td>
<td><img src="image" alt="Stickers for Affordable housing" /></td>
</tr>
<tr>
<td>Cymorth a chyllid busnes</td>
<td><img src="image" alt="Stickers for Cymorth a chyllid busnes" /></td>
</tr>
<tr>
<td>Business support and funding</td>
<td><img src="image" alt="Stickers for Business support and funding" /></td>
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<tr>
<td>Mynediad l... / Access to...</td>
<td>Dewisiadau / Choices</td>
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<td>Education</td>
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<td>Gofal lechyd</td>
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<td>Healthcare</td>
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<td>Band eang cyflym</td>
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<td>High speed broadband</td>
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<td>Mynediad i... / Access to...</td>
<td>Dewisiadau / Choices</td>
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<td>Marchnadoedd rhyngwladol</td>
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<td>International markets</td>
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<tr>
<td>Cyflogaeth/swyddi lleol</td>
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<tr>
<td>Local employment / jobs</td>
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<td></td>
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<tr>
<td>Trafnidiaeth gyhoeddus</td>
<td></td>
</tr>
<tr>
<td>Public transport</td>
<td></td>
</tr>
<tr>
<td>Mynediad i... / Access to...</td>
<td>Dewlsladau / Choices</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Siopau a gwasanaethau (e.e. siop gyfleus, swyddfa bost a banc ac ati)</td>
<td><img src="image1.png" alt="Choices" /></td>
</tr>
<tr>
<td>Shops and services (e.g. convenience store, post office and bank etc.)</td>
<td><img src="image2.png" alt="Choices" /></td>
</tr>
<tr>
<td>Cefnffyrdd</td>
<td><img src="image3.png" alt="Choices" /></td>
</tr>
<tr>
<td>Trunk roads</td>
<td></td>
</tr>
</tbody>
</table>
Defining and Fostering Rural Areas in Wales

Hoffem wybod a ydych chi'n ystyried unrhyw wahanol ffydd o ddiffinio ardaloedd gwledig yn eich rhanbarth, a ph'un a ydych chi'n ystyried bod unrhyw fathau eraill o seiliwth cymdeithasol, diwyliannol 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.

Gnewch nodyn ar ein map isod neu ysgrifennwch eich sylw ar nodyn gludio a'i osod rwyte yma.

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

SWOT Activity Photos
ECONOMIC WEAKNESSES

- Service "sweet spot"
- Tourism dominates
- Is there enough?
- Low wages
- Large buses
- Tend to have
- Dis-economy of scale
STRENGTHS

- HISTORY
- PHYSICAL
- OTHERWISE
- Tourism
- INT'L APPEAL
- (past
- NOW)
- ARTISAN
- SKILLS
- RURAL
- HUBS+
- SUSTAIN

OPPORTUNITIES

- GROWTH
- VENK
- CAREERS
- EDUCATIONAL
- QUALIFICATIONS
- B2C
- HISTORY
- AS A GROWTH
- AREA
- WELLBEING/
- HEALTH
- SENSE OF
- COMMUNITY
- WAY OF
- LIFE
- DIGITAL
- COMMUNITY
- TOURISM+
- DIVERSIFICATION
- SATELLITE
- COMMUNITIES
- PROVIDE
- MORE
- GROWTH
- FOR NEW
- BUSINESS
- DIRECTORS
ECONOMIC
WEAKNESSES

- Access to services/facilities
- Service "sweet spots"
- Tourism dominates
- Disconnected
- Housing recovery/rental issues

- Unit of the time age
- Social infrastructure (critical mass)
- Large land mass
- Is there enough?
- Low wages
- Land use is reduced
- NEEDED TO DRIVE

THREATS

- Needs to be protected
- AGA + low employment
- NAPC
- Brexit
- Will everything go to the SE?
- EC funding children in rural areas
- RNP
- NAPC
- NAPC
- MNC
- EU funds
- NAPC - Dublin
PLANNING LEVERS / BARRIERS

- Enterprise Zones
  - How defined (e.g., Local Enterprise Zones)
- Rural Enterprise Zone
- Rural issues vary by LPA
- Capacity
  - Need
  - Opportunity
- Weight of evidence base
- Business support
- Wales' budget hole
- Do we want pop'n growth?
- Do you think planning
- Rural sustainability
- It's a trade-off - economy vs.
- S4+59
  - IMP of diversification & land use
- MAPing issues - for community
- Priorities
  - PN in the 'middle'
  - Convene the RSC as well as the ASET
  - What is our approach to...
  - Where are our businesses selling to?
  - RAN6 revamp?
ENVIRONMENTAL

WEAKNESSES

Surrounding

Suitability of rural areas for current EV infrastructure

tourist 'n grid

Congestion
<table>
<thead>
<tr>
<th>STRENGTHS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism opportunities → not in self-catering</td>
</tr>
<tr>
<td>Resource rich</td>
</tr>
<tr>
<td>tourism contribution to the economy</td>
</tr>
<tr>
<td>marine environment</td>
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<tr>
<td>Built Heritage</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism tax → for benefit of local area</td>
</tr>
<tr>
<td>Housing</td>
</tr>
<tr>
<td>Community energy generation.</td>
</tr>
<tr>
<td>outdoor activities/adventure. Unique Products not just accommodation.</td>
</tr>
<tr>
<td>reconsideration of transport infrastructure for long distance travel.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Major Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reservoirs for an attraction.</td>
</tr>
<tr>
<td>linking in to energy infrastructure + creating apps for it.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Circular economy - using waste to benefit.</th>
</tr>
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<tbody>
<tr>
<td>Offshore renewable energy</td>
</tr>
<tr>
<td>Balancing renewable energy generation w/ landscape.</td>
</tr>
<tr>
<td>tourism opps. linked to lifestyle</td>
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<tr>
<td>tourism + heritage</td>
</tr>
<tr>
<td>environmentally friendly travel.</td>
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<tr>
<td>Car sharing - needs parking infrastructure.</td>
</tr>
</tbody>
</table>
ENVIRONMENTAL
WEAKNESSES

Uncertainty surrounding future of farming.
- Knock on effects to land management.

Capacity issues within tourism.

Public Transport

Accessibility

Suitability of rural areas for current EV infrastructure

Tourist 'hot spots'
- Congestion + landscape impact

Reliance on the private car

Grid connectivity

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)

Policy only applicable to designated areas
- Protection of areas

Air pollution & carbon impact of farming
- Limitations of the grid - who pays to keep it in operation?

Loss of sheep farming
- Impact on uplands vegetation

Water pollution

Fishing
**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

Strong environment = more enviro. assessment
- Policy
- Limitations of the planning system to solve all problems
- Strategic level planning for electricity infrastructure

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

---

**Priorities**

- Rural Wales for everyone
- Economic growth vs. protection
- ‘Finding the Balance’
  - Who benefits?
- Electric car infrastructure
- Innovation vs. protection
  - Prioritisation

Planning for different areas/different types of farming activities
- Balance between developing rural areas and preventing isolation/inaccessibility
- Grid connectivity & energy infrastructure - national level
Socio-Cultural Weaknesses

- Loss of Church for sense of community
- Employment
- Commuter, hubs
- Service, access, provision
- Failure infrastructure, routing
- Distance to work
- Loss of younger people
Appendix D

Mid & South West Wales Rural
– Event Register
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.
<table>
<thead>
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<th>Wyn Thomas</th>
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</table>

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.
**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**

<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>MIKE ELLERY</td>
<td>ANEURIN BEGYN H/BORAD</td>
</tr>
<tr>
<td>IAN SANDFORD</td>
<td>WPD</td>
</tr>
<tr>
<td>DAVID JAMES</td>
<td>MONMOUTHSHIRE H.A</td>
</tr>
<tr>
<td>Rachel Jones</td>
<td>Carmarthenshire C.C.</td>
</tr>
<tr>
<td>ADRIAN</td>
<td>WALES TOURISM ALLIANCE</td>
</tr>
</tbody>
</table>

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.