

Rural Wales Youth Survey

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Rural Wales Youth Survey

Executive Summary

This report presents the findings from a survey of over a thousand young people aged between 14 and 25 living in rural Wales, conducted between July and September 2021. The survey was administered online, with participants recruited through a social media campaign. A total of 1056 useable responses were received. Analysis of the survey results has been complemented by insights from seven discussion sessions with groups of young people in Ceredigion, Pembrokeshire and Powys, facilitated by local authority youth services teams.

The **headline findings** are:

- 75% of young people **enjoy living** in rural Wales.
- Only 22% of young people agree that **employment opportunities** in their local area are good.
- 61% of young people are concerned about being able to **find a suitable job** in their local area.
- 59% of young people are concerned about being able to **afford to buy a house** in their local area.
- Only 26% of young people agree that **public services** in their local area meet their needs; 50% think that they do not.
- Only 27% of young people agree that **social and cultural opportunities** in their local area are good, 56% disagree.
- 27% of young people would **prefer to continue to live in their local area** for all of their life, but 50% disagree.
- 40% of young people in rural Wales say that they would **prefer to live in a larger town or city**, but a similar proportion disagree.
- 81% of young people think that they will **need to move away** from their local area **for education, training or work**.
- 48% of young people think that they will **need to move away** from their local area in order **to find suitable, affordable housing**.
- 57% of young people would like to **move back to their local area** later in life if they move away.
- Only 18% of young people anticipate that they will **continue living in their local area** over the next five years; 42% expect to **move outside Wales** in this period.

The large sample covered by the survey enables these aggregate results to be broken down to produce a more nuanced picture. Gender, age, education or employment status, Welsh language ability, and where young people live all can make a difference to their perceptions about life in rural Wales and their future intentions.

The **key insights** produced by the disaggregation of overall results include:

- **Young women** tend to be more dissatisfied than young men with employment, social and cultural opportunities in their local area, and slightly more likely to consider that they will need to move away for education, training or employment. Young men tend to be more inclined to want to live in their local area all their life than young women.
- **First language Welsh speakers** are generally more positive than young people as a whole about life in their rural area, especially about public services and social and cultural opportunities, and are more likely to want to continue living in their local area or to return if they move away. Nonetheless, the majority of first language Welsh speakers think that they will need to move from their local area for employment, education or housing, with a third anticipating that they will move outside Wales in the next five years.
- There are notable differences in the views and expectations of first language Welsh speakers and fluent speakers of Welsh as a second language, especially in relation to social and cultural opportunities and employment opportunities, suggesting that cultural identity and being part of a Welsh-speaking community through family ties are more important in shaping outlooks than language competence.
- Young people who **do not speak Welsh** at all tend to be more dissatisfied with social, cultural and employment opportunities in rural Wales. They are less inclined to want to return to their local area if they move away.
- The views of young people also vary by **age group**, evolving as young people progress through education and into employment. Decisions about staying in or leaving rural Wales are closely tied with decisions about higher education. For many, going to university is an opportunity for a different, often more urban experience, including in cities in England. The capacity of graduates to return to their home areas after studying is coloured by perceptions of employment opportunities, with many **current students** believing that they will need to move outside Wales to find appropriate graduate-level jobs in their field.
- Young people who are **currently in work** tend to be more likely to intend to continue living in their local area, but many have concerns about career progression and housing affordability. A substantial number of young people working in rural Wales believe that they will need to move from their local area to find jobs or housing, either to destinations within rural Wales or outside.
- Older respondents, **aged 22 to 25**, have generally made a conscious decision to remain in or return to their local area. They tend to be more positive about rural life and more settled, but are more likely to be dissatisfied with public services and concerned about housing. Many still think that they will need to move for employment or housing.
- There are **geographical differences** in views on public services and social and cultural opportunities, concerns about housing and employment, and the hopes of young people to move back to the area later in life if they move away. Concerns about affordable housing are highest in Pembrokeshire (69% of respondents) and lowest in

Powys (49%), whilst respondents in Pembrokeshire (68%), Conwy (67%) and Carmarthenshire (66%) have the greatest concerns about finding a job locally.

- Young people in Conwy are most likely to think that they will continue living in their local area over the next five years (29%), and those in Ceredigion the most likely to think that they will move away (only 14% anticipating that they will stay). Young people in Conwy (67%) and Pembrokeshire (64%) are most likely to want to return if they move away, and young people in Monmouthshire the least likely to return (44%).

From the survey analysis, young people in rural Wales can be categorised into three groups according to their hopes, concerns and expectations around migration:

- **‘Likely stayers’**, who either would prefer to continue living in their local area all their life or neutral about doing so and also do not think that they will need to move away for employment, education or housing. These comprise about one in ten young people completing the survey. Compared with survey respondents as a whole, this group is disproportionately male and about twice as likely to be currently working rather than in education.
- **‘Intending leavers’**, who want leave their local area, at least for a period, with two thirds preferring to live in a large town or city. About half of young people completing the survey fall into this group. Students in school, sixth form or college are over-represented in this group, and first language Welsh speakers are under-represented. Around a third of this group want to leave their local area permanently, but the majority are open to moving back later in life, including around a third who express a desire to do so.
- **‘Potential stayers’**, who would prefer to continue living in their local area, or are neutral about remaining, but believe that they will need to move away for employment, education and/or housing. More than two-fifths of survey respondents fall into this category, with first language Welsh speakers and respondents currently in work over-represented. Some of this group anticipate being able to stay in their local area in the short-term, with nearly a third envisaging that they will not move in the next five years, but most consider that they will leave in this period. Almost all would hope to return to their local area later in life if they move away.

The sizeable group of potential stayers implies that are a substantial number of young people in rural Wales that would be responsive to policy interventions to try to stem out-migration. The **main lessons for policy** to be drawn from the study are:

- Initiatives aimed at increasing the availability of affordable housing, improve pay levels, and expand the range of available jobs in rural Wales are most likely to have an impact in enabling the group of potential stayers to remain.
- Efforts to enhance entertainment and leisure facilities and to improve transport connections with towns and cities are likely to make a difference for the likelihood of young people more broadly choosing to stay in rural areas.

- Diversification of the economy in rural Wales and strategic targeting of new and growing sectors such as green technology, biotechnology and hi-tech manufacturing can help to broaden employment opportunities and increase pay. However, there is a challenge in aligning these priorities for economic development with the career aspirations of young people in rural Wales. Strategic investment in these areas needs to be accompanied by promotion of these sectors in schools and colleges to raise interest and provision of appropriate training locally.
- Strategies to support creative industries and to strengthen training opportunities in healthcare could also help to retain young people in rural Wales, as would targeted support to assist entry to farming.
- The post-pandemic expansion of remote and home working is not in itself likely to lead to more young people choosing to remain in rural areas, with fewer than one in ten survey respondents selecting working from home as their preferred working environment.
- There is significant interest in self-employment and entrepreneurship among young people in rural Wales, especially young men, which could create opportunities to enable young people to live and work in rural areas if nurtured through strategic initiatives.

Background

The out-migration of young people from rural Wales is a long-standing trend and has been the focus of renewed concern in recent years. Participants in workshops, surveys and meetings that contributed to the Rural Vision for Wales produced by Aberystwyth University and the Welsh Local Government Association Rural Forum as part of the ROBUST project frequently cited youth out-migration as a key challenge facing the region.¹ Youth out-migration was commonly attributed to limited employment opportunities and pressures on housing availability and affordability and linked to concerns about the demographic ageing of rural communities, the sustainability of rural services including village schools, the weakening of community identities, and the use of Welsh in everyday life.

The statistical evidence provides qualified support for the perception of young people leaving rural Wales, although the picture is clouded by the student populations in Aberystwyth, Bangor and Carmarthen. Figures on migration flows by age are not yet available for the 2021 Census, but in the year preceding the 2011 Census there was a net outflow of young people from all nine of the predominantly rural local authorities in Wales, except for Ceredigion and Gwynedd (Table 1).² Students moving to university produced a net inflow in Ceredigion and Gwynedd, but if the university towns of Aberystwyth, Bangor and Lampeter are excluded the remaining areas of these counties are also likely to have experienced a net outflow of young people. The margins are however quite small, ranging from a net loss of 123 young people in Anglesey to a net loss of 678 young people in Powys.³ Similarly, the proportion of young people aged between 16 and 24 moving away to another local authority area in the year 2010 to 2011 ranged from 9.0% in Carmarthenshire to 15.3% in Monmouthshire.

More recent mid-year population estimates by the Office of National Statistics indicate that the number of young people aged between 16 and 24 living in the nine predominantly rural counties decreased by around 10% (or just over 10,000 individuals) between 2010 and 2020, despite the total population of rural Wales increasing by 2.4% over the same period.⁴ However, this trajectory is shaped by long-term demographic trends as well as migration, with the number of young people aged 16 and 24 also decreasing in Wales as a whole and the UK as a whole over the same period. Yet, the decline in rural Wales has been sharper and has accentuated an already uneven age profile in many rural communities. Most wards in rural Wales have a smaller proportion of their population aged between 18 and 29 than the Wales average, with the disparity especially acute in parts of southern Powys, Carmarthenshire, Pembrokeshire and Monmouthshire (Figure 1).

¹ [A Rural Vision for Wales: The Evidence Report](#), Aberystwyth University and WLGA, 2021

² Carmarthenshire, Ceredigion, Conwy, Denbighshire, Gwynedd, Isle of Anglesey, Monmouthshire, Pembrokeshire, and Powys

³ Census 2011: Migration by Age and Sex, from NOMIS.

⁴ Mid-year Population Estimates, from StatsWales

	16-24 Age Group			Outflow as % of
	Inflow	Outflow	Net	total 16-24 age group
Carmarthenshire	1582	1758	-176	9.0%
Ceredigion	4209	1947	+2262	14.9%
Conwy	867	1222	-355	11.2%
Denbighshire	847	1146	-299	11.4%
Gwynedd	3112	2079	+1033	12.8%
Isle of Anglesey	579	702	-123	10.1%
Monmouthshire	717	1361	-644	15.3%
Pembrokeshire	821	1285	-464	10.1%
Powys	984	1662	-678	13.1%

Table 1: Migration in and out of rural counties in Wales by young people aged between 16 and 24 between April 2010 and April 2011.

Source: NOMIS (2011 Census data)

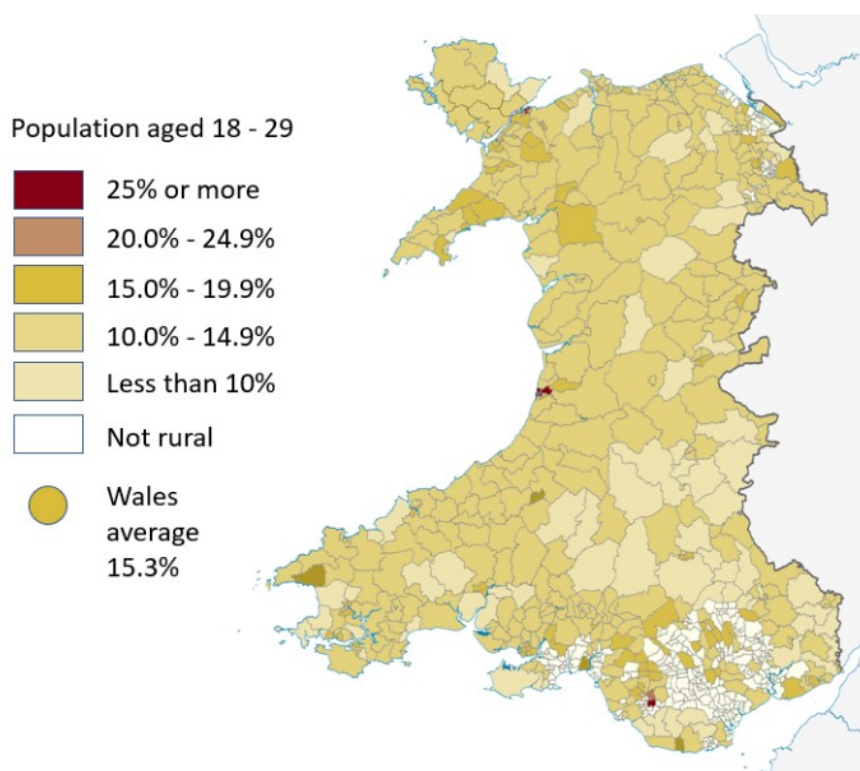


Figure 1: Population aged 18 to 29 in rural wards in Wales, 2019 (Rural counties plus 'rural wards' eligible for RDP. Source: Stats Wales)

Research by the Wales Rural Observatory in 2013, focused on case studies of six rural communities, indicated that young people's aspirations and migration decisions were informed by a mix of considerations. These included access to employment and education, increasing concerns about housing affordability, and quality of life issues, such as leisure and

entertainment opportunities. Participants in the study were generally positive about local service provision, with the notable exception of public transport. At the same time, many young people also expressed a strong attachment to their home community and indicated that they would hope to return later in life if they moved away. The WRO report concluded that, “rural communities across Wales will continue to face a net loss of young people to larger population centres in the foreseeable future. Comments from the young people and the young families who participated in the discussion groups confirmed that much of this outflow can be attributed to a combination of educational, employment, financial and social factors. However, many of these same individuals also expressed a desire to return to their home communities at some point in the future, if these communities could be made more attractive to young people”.⁵

Later research conducted by Ffion Storer Jones for the Rural Youth Project in 2020 reinforced and expanded the findings of the WRO study, highlighting both a strong sense of belonging among young people in rural Wales and concerns about pressures that may necessitate moving away from home communities. Drawing on a survey responses from 263 young people aged between 16 and 28 and focus groups with a further 20 participants, the report found that whilst 89% of respondents still lived in the place where they grew up (perhaps reflecting that majority were aged 16-18), 60% had considered moving to a town or city where employment opportunities were better, and 68% agreed that it was difficult to find work close to where they lived. Overall, 61% were optimistic about the future, but only 11% thought that they had a say in the way that decisions were made about rural Wales.⁶

The WRO and Storer Jones studies both provide insights into the experiences of young people in rural Wales and how these inform dynamics around migration. Yet, both were based on fairly small numbers of participants and have limitations in capturing the full diversity of youth experiences, opinions and plans across the different counties of rural Wales and across gender, age and cultural context. As such, the evidence base available in addressing concerns about youth out-migration in the Rural Vision for Wales was partial. Moreover, the ROBUST research team working on the Rural Vision were conscious that there had been little direct input into the Vision by young people themselves (an attempt to organize an online workshop with young people had not recruited sufficient participants to be viable).

The survey reported here was accordingly undertaken as a follow-up to the Rural Vision within the ROBUST project in order to assemble a more extensive evidence base to inform the implementation and development of the Rural Vision by rural local authorities and other bodies, and in particular to explore the potential impact of policy interventions that had been proposed in the Rural Vision statement.

⁵ [The Experiences and Aspirations of Young People in Rural Areas](#), Wales Rural Observatory, 2013.

⁶ [Wales Rural Youth Research](#), Ffion Storer Jones, 2020.

Methodology

The survey was conducted through an online questionnaire containing a mix of closed multiple-choice questions, Likert-scale questions, and free text answers. The questionnaire was available in both English and Welsh and respondents could opt to complete the survey in either language. The survey was aimed at young people aged between 14 and 25, living in rural Wales, with a target of 1,000 responses. The survey opened on 12th July 2021 and closed on 30th September 2021.

Four Cymru were commissioned to publicise the survey through a social media campaign as the primary mechanism for participant recruitment, with campaign materials featuring a direct link to the online survey. The survey was also promoted through local authority youth services teams, supported by the WLGA. Responses to the questionnaire are anonymous, but on the completion of the survey respondents had the option of clicking on a link to an entirely separate website on which they could enter a prize draw. Just over half of the respondents chose to enter the draw. The draw was administered by Four Cymru and the identities of the entrants and the prize winners have not been disclosed to the survey research team.

As the survey respondents were self-selecting the potential for bias was mitigated by monitoring responses on a weekly basis by gender, age and geographical distribution, and adjustments made to the targeting of the social media campaign to encourage participation from under-represented groups. The final profile of respondents is detailed in the next section.

In parallel with the survey, a template for a group discussion was distributed to youth workers through local authority youth services teams for use with youth clubs or similar groups. The template was structured around three questions – ‘What is important to you about living in your local area?’, ‘What are some of the challenges or problems facing you living in your local area?’, and ‘What are some of things that could help you to stay in or return to live in the local area?’. Summaries were reported back from discussions with seven groups including Brecon Youth Project, Pembrokeshire Youth Assembly, the Dewis Youth panel in Ceredigion, schools in Aberaeron, Aberystwyth and Llandysul, and an online discussion with 14 year-old males in Ceredigion. These have been drawn on as qualitative data to inform interpretation and discussion of the quantitative survey results.

Respondents

A total of 1056 useable responses to the survey were received, though not all respondents answered every question. Of these, 971 questionnaires were completed in English and 85 in Welsh. Two-fifths of respondents were women, compared with just over a third who were men, and 4% who identified as non-binary (Figure 2). This gender distribution is similar to that achieved by Storer Jones, but substantially under-represents men, who constituted 53% of the 16-24 age cohort in rural Wales in 2020.⁷

Respondents ranged in age from 14 to 25, with a mean age of 18.7. Respondents aged 16 and 17 are over-represented relative to the total population, providing 28% of survey responses, whilst respondents aged over 21 are under-represented at 30% of responses (Figure 3). The age distribution is also reflected in the current educational or employment status of respondents, with 42% in school, sixth-form or college, 25% at university, and 15% working full-time.

Almost all respondents (96%) lived in one of the nine predominantly rural local authority areas, with the remainder living in rural areas in other parts of Wales, including in Flintshire, Neath Port Talbot, and Wrexham. Gwynedd (184 responses), Powys (181), Carmarthenshire (119), Ceredigion (103) and Pembrokeshire (102) provided the largest number of survey responses (Figure 4). Relative to the total distribution of the 16-24 cohort in rural Wales, Gwynedd, Powys, and Isle of Anglesey are over-represented in survey responses, and Carmarthenshire, Conwy and Denbighshire are under-represented. Just under a quarter of respondents indicated that they live away from home for part of the year, primarily as students at university. Two-fifths of respondents described their home residence as a village, slightly fewer as a town, and around a fifth as open countryside (Figure 5).

Nearly a quarter of respondents described themselves as first language Welsh speakers, with a further 21% indicating that they were fluent second language Welsh speakers. Only 14% of respondents indicated that they do not speak Welsh at all (Figure 6). These figures are not directly comparable with other statistics on Welsh language ability and use but suggest that Welsh speakers are over-represented in the sample relative to the total 16-24 age cohort in rural Wales.

⁷ Population estimates by local authority and age, StatsWales, 2020.

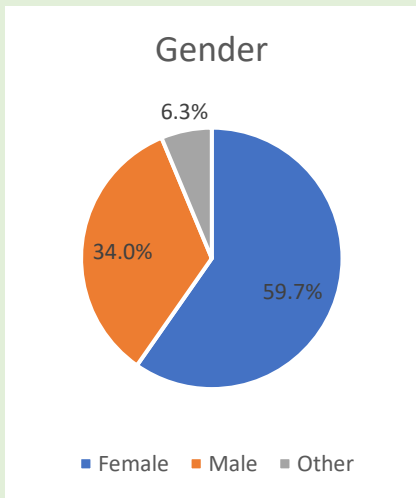


Figure 2: Gender of survey respondents

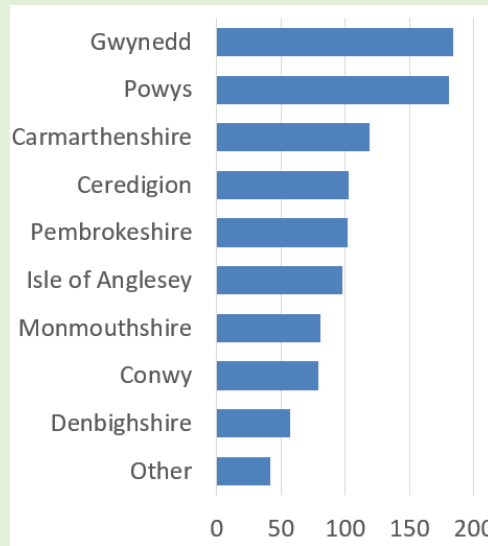


Figure 4: Survey responses by local authority area

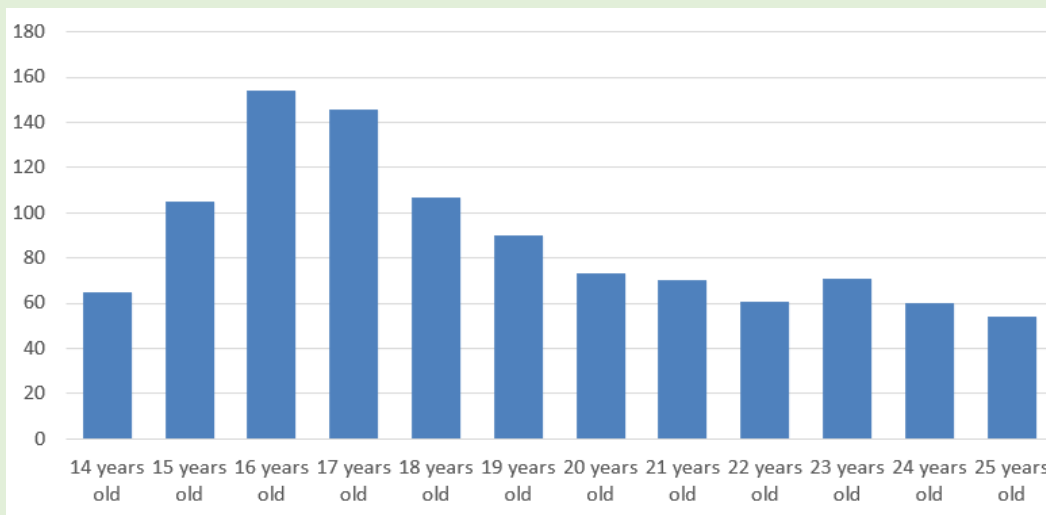


Figure 3: Age distribution of survey respondents

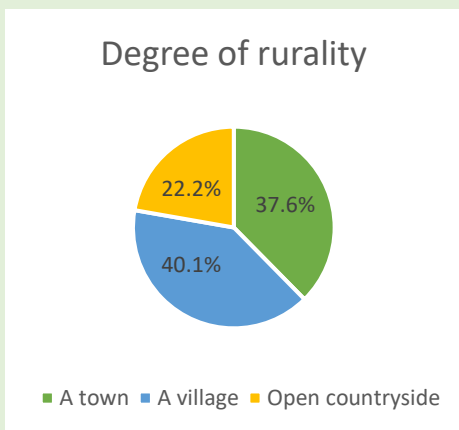


Figure 5: Home location of respondents

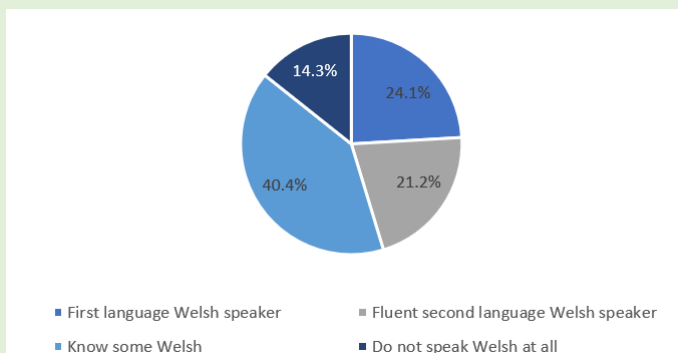


Figure 6: Welsh language proficiency of respondents

Living in Rural Wales

The survey reveals the mixed feelings of many young people about living in rural Wales. Overall, young people demonstrate a strong affinity with rural Wales, and over 75% of respondents stated that they enjoy living in rural Wales, with only 11.5% disagreeing. Yet, when asked about satisfaction with specific aspects of life in their local area, including the quality of public services, social and cultural opportunities, and access to employment and housing, far greater discontent is registered. Only 26% of respondents agreed that public services in their local area met their needs, only 22% agreed that there were good social and cultural opportunities for them in their area, and only 21% agreed that employment opportunities in the local area are good (Figure 7). A majority of respondents disagreed with each of these statements. Similarly, nearly 60% of respondents were concerned about being able to afford to buy a house in their local area.

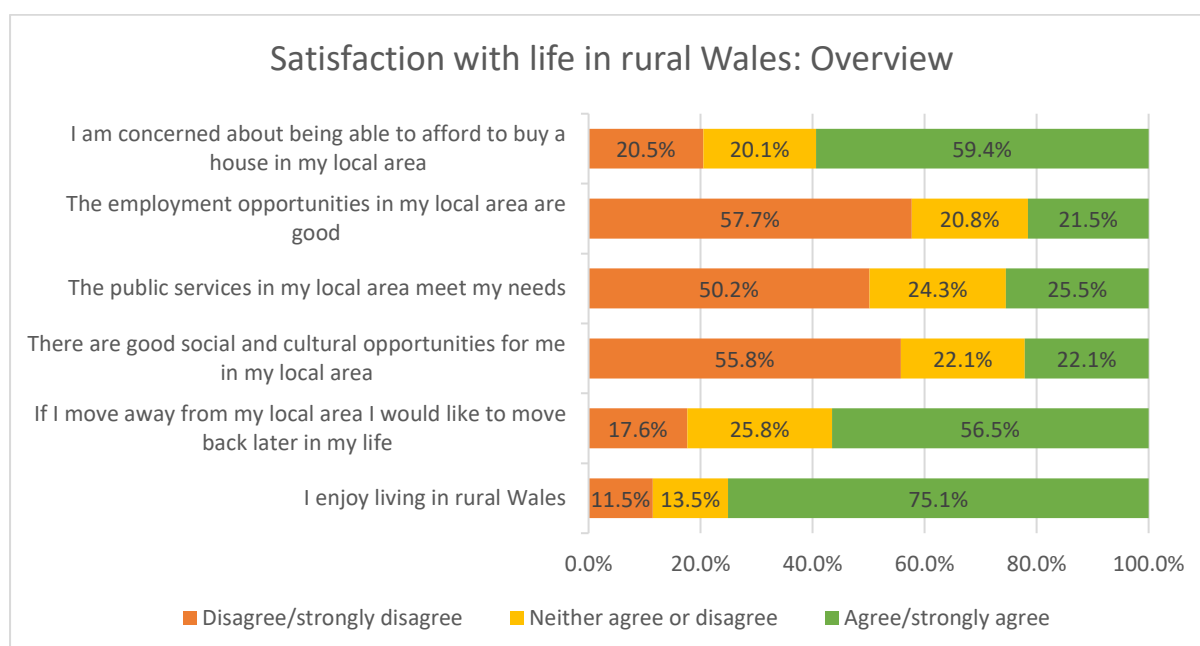


Figure 7: Responses to statements on satisfaction with life in rural Wales

The overall enjoyment of living in rural Wales is fairly consistent across genders, age groups and counties, although there are notable underlying variations. Young people in Denbighshire are most likely to agree that they enjoy living in a rural area (84%), whilst those in Monmouthshire are most likely to disagree (18.5%) – closely followed by Carmarthenshire (16%) and Ceredigion (14.6%). Those living in open countryside are more likely to say that they enjoy life in rural Wales than those living in villages (83% to 72%), and first language Welsh speakers are substantially more likely to enjoying living in rural Wales (87%) than respondents who do not speak any Welsh (62%).

Respondents aged 22 and over were similarly more likely than younger age cohorts to enjoy living in rural Wales (with 82% agreeing), perhaps reflecting that they were also more likely to have moved away and made a conscious decision to return (Figure 8). Yet, the gap between overall enjoyment of rural life and dissatisfaction with specific services and opportunities is also most pronounced for this group, again possibly reflecting experiences of having lived elsewhere, but also a more direct interest in employment opportunities and housing. For instance, 59% of respondents aged 22 and over disagreed that public services in their local area met their needs compared with 40% of 14-16 year olds (Figure 9).

Women are more likely to be dissatisfied with public services than men, and discontent with public services is notably higher among respondents living in open countryside than in towns or villages (Figure 10). Dissatisfaction with social and cultural opportunities in the local area is similarly highest among women and respondents aged 22 or over, but also varied significantly between different parts of Wales. The proportion of respondents agreeing that social and cultural opportunities were good ranged from 15% in Pembrokeshire to 30% in Conwy.

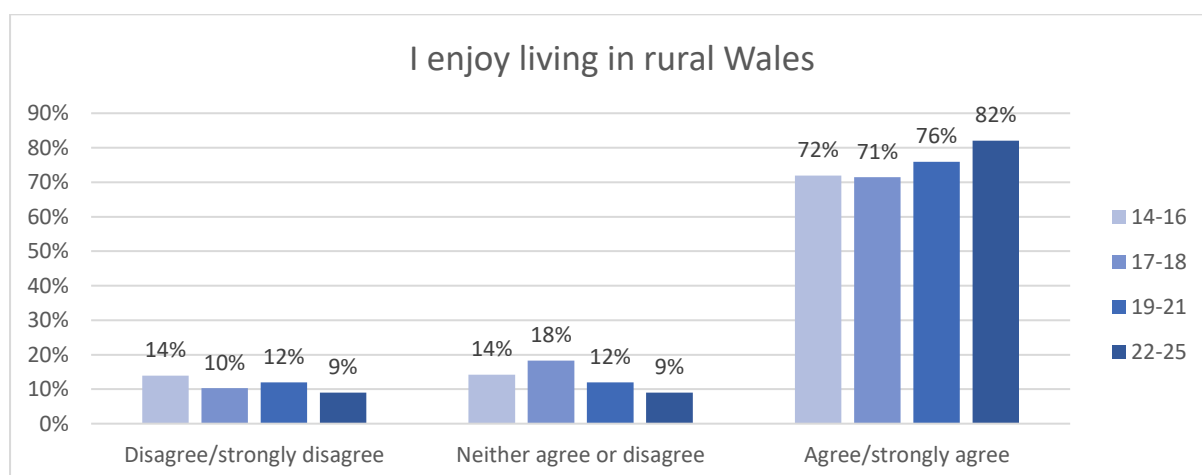


Figure 8: Responses to the statement 'I enjoy living in rural Wales' by age group (n=1055)

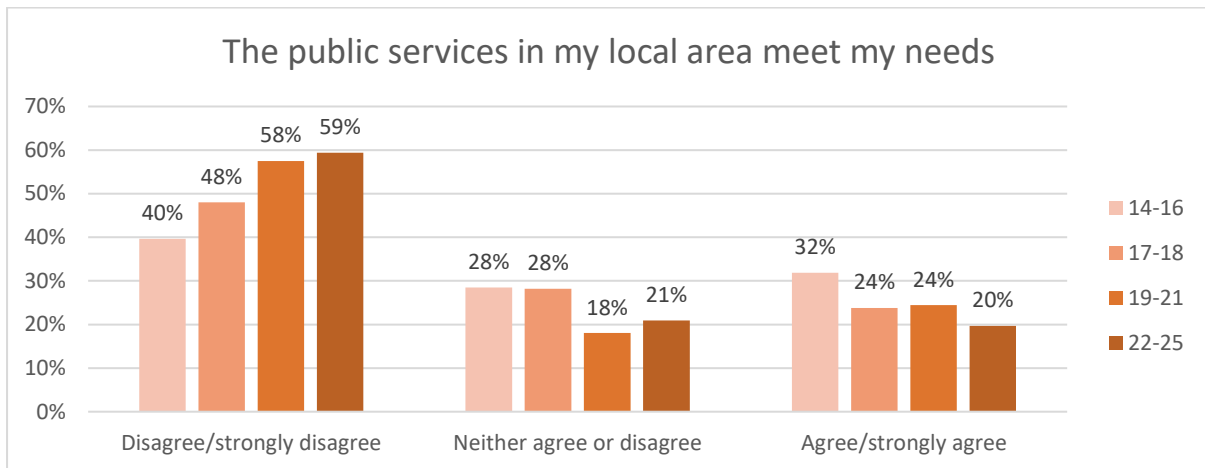


Figure 9: Responses to the statement 'The public services in my local area meet my needs' by age group (n=1052)

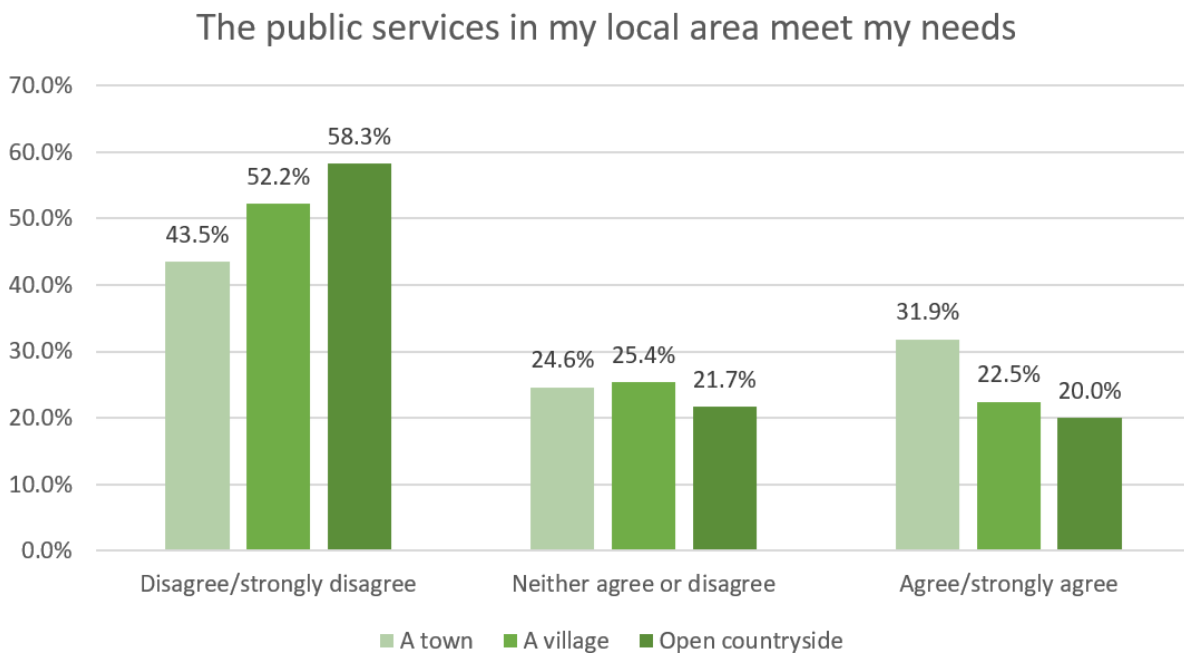


Figure 10: Responses to the statement 'The public services in my local area meet my needs' by type of area of residence. (n=1052)

Free text answers provided by respondents to the question of what they like about living in rural Wales further illuminate the contrast between generally positive overall feelings towards rural life and largely negative attitudes towards specific aspects of service provision and social and economic opportunities. The examples given by respondents of what they like about living in rural Wales commonly relate to attributes of the rural landscape and environment, opportunities for outdoor recreation, personal safety, and the sense of community, for example (see also Figure 11):

Several survey respondents directly contrasted these positive features of rural life to experiences or perceptions of life in urban areas:

I love being surrounded by the countryside- it's quiet, with low levels of light, sound and noise pollution. The community is more trustworthy than in a town and I feel less preyed upon (as a woman I've known friends to be inappropriately approached/touched etcetera).(Female, Carmarthenshire)

The calmness, the scenery on my doorstep. I moved to Newcastle for university which I loved but I am definitely more of a quiet life kind of person (Female, Isle of Anglesey)

Feeling free in terms of not being trapped in a city, being able to go walking whenever I like. Beautiful views. (Female, Denbighshire)

I love the views, the quiet, knowing most people in my area, and the feeling of community you don't get in cities. I do not find people in cities as friendly (Female, Pembrokeshire)

It's very peaceful and quiet without disturbance of anti-social, disobedient "townies" It's a much nicer more friendly environment. (Male, Carmarthenshire)

It's very peaceful with beautiful scenery, amazing natural environment with the best opportunities for hiking, climbing, wild swimming etc. Also a much stronger sense of community here compared to living in a big city such as Manchester or Leeds. (Male, Gwynedd)

I used to live in a city, feels safer than that. (Female, Powys)

Privacy, fresh open air, less social pressure than the big cities. (Female, Isle of Anglesey)

For some participants, these contrasts had been accentuated by the COVID-19 lockdowns, with appreciation expressed for the access to green space, community solidarity and relatively lower incidence of COVID-19 experienced by spending lockdown in their rural home community:

I really appreciated the space we have in rural Wales during the stricter covid lockdowns having returned from studying in a city where I would have felt trapped. (Female, Pembrokeshire)

I enjoy the peace and quiet I get from living in rural Wales, especially during COVID. I definitely feel that I have been safer and haven't been massively affected by lockdowns due to living in the countryside and having been able go outside without seeing anyone. It has made me appreciate the space and sense of community that comes with living in a small area. (Female, Powys)

I love the scenery, the local area, and the strong sense of community. Everybody knows everyone and people always help each other out when in need. This was strongly felt during the first lockdown. (Male, Isle of Anglesey)

Freedom- I was able to go outside and on walks during lockdown without seeing anyone (Ceredigion)

Conversely, examples of what respondents do not like about living in rural Wales tend to focus on social relations, service provision and the economy, with these usually being framed in terms of the *absence* of opportunities or facilities, as signified by the prominence of the word 'lack' in the word cloud in Figure 12. Issues of limited public transport, broadband and mobile

connections, and social and leisure facilities were commonly cited, with many emphasizing the resulting challenges for socialising and contributions to feelings of isolation:

I feel isolated from the outside world, feels like a bubble in a rural community. I am far away from my friends. There isn't much excitement or opportunity to do things as you get in a city. (Female, Ceredigion)

More often than not, I end up travelling across the border for social activities with friends as there isn't the same facility in rural Wales (Female, Conwy)

The local transport links are horrendously problematic with bus services never aligning properly and most of the transport network cutting off at 5pm (Male, Conwy)

Nowhere to go to theatres, museums, science centres, no classes to take after school or in holidays. terrible transport. (Female, Ceredigion)

Barely any job opportunities. Easy to feel stale seeing the same people all the time (Female, Powys)

I can't drive and I live on a mountain in the middle of nowhere so when I'm back from university after a period of time I can feel stranded very quickly as public transport is practically non-existent where I am (Female, Carmarthenshire)

I feel extremely socially and culturally isolated and limited, as there are less people living in my area and I cannot go anywhere without driving/limited public transport. I feel sheltered and unable to expand my adult experiences. I also feel limited in opportunities moving forward in life. (Female, Gwynedd)

No local shop, no jobs, no hope in young people for the future, no ambition to achieve. Only things to do socially are drink and eat at unhealthy chain restaurants. Antisocial young people. (Female, Carmarthenshire)

Connectivity with mobile signal and broadband is very poor, so it's more difficult to stay connected or enjoy my hobbies (e.g. online gaming with friends) (Female, Pembrokeshire)

Internet connectivity is terrible, making it difficult to work from home/do paperwork or coursework online (it takes significantly longer to research and submit work for uni) and it can limit your social life somewhat. It can be more restrictive when you want to socialize with friends as you need to have access to transport, especially when you want to have a few drinks (Female, Ceredigion)

I don't like the lack of independence I have as a young person here. Everything about living is more difficult because of weaker infrastructure and a lack of investment which limits leisure activities as well as employment. I have fewer friends here and it's more difficult to see them and we have fewer things to do (M, Ceredigion)

I don't have signal or a strong WiFi where I live and this day and age it's a must have. You get punished and made to feel stupid in schools because you can't use the homework format. I have actually been called a "liar" in front of my friends and family because I said I don't have WiFi or signal (Female, Monmouthshire)

We can't get like just eat/uber eats etc lol and there's nothing you can do like if you were bored and not going out for the day then there's nothing in walking distance, I'd have to get a lift everywhere. (Female, Monmouthshire)

The lack of take-away options, gyms and other things people in the city take for granted (Male, Powys)

Tourists flock to my area only to disrespect the environment and have no understanding that the locals have to work (Female, Pembrokeshire)

I don't like all the holidaymakers who come here and don't know how to behave properly in the countryside because no one's taught about the countryside code at school. The roads are too busy with people who don't know how to drive in rural areas and it makes me scared to leave the house, so I can't enjoy the area I live in during school holidays. (Female, Pembrokeshire)

Small towns are overcrowded in summer with second home owners and holiday makers which causes anyone working in hospitality to be overworked and underpaid (Male, Pembrokeshire)

Again, the survey responses were reflected in the group discussion, with challenges or problems identified with living in their local rural area tending to focus on limited jobs and public transport, a lack of shops, pressures from second homes and tourism, and the difficulty of socialising with friends and meeting new people.

Negative experiences and perceptions of rural life contribute to decisions by young people to move away from rural areas of Wales, yet there is also recognition that out-migration has an intensifying effect on demographic ageing of rural communities increasing the isolation of young people, especially for those who stay when contemporaries leave for university or work:

At times I find it difficult to find opportunities to socialise. A lot of my peers have moved away. (Female, Gwynedd)

I feel isolated from most people my age - my village is full of people my parents age or older (Female, Pembrokeshire)

THERES NO ONE HERE. I am the only person below 20 and above 15 in a 5 mile radius at least (Female, Monmouthshire)

My school friends all moved away to cities to study and work. And there isn't a great deal of places to socialise such as bars. (Female, Powys)

Everyone is old and dying. All the youth that can leave, do leave, for University or work. The only youth who are left are here because they don't have the capability to leave. (Male, Carmarthenshire)

There aren't many young adults about, so making friends can be hard and there are not a lot of opportunities in terms of activities and hobbies. (Female, Pembrokeshire)

For some young people, difficulties of socialising with friends and feelings of isolation, not only fuel negative sentiments towards living in rural Wales, but have contributed to problems with mental health, as a few survey respondents described:

It is very isolating at times. I do not have any friends my age that live any closer than an hour to me. I am the only one of my friends who has transport. It is very lonely and oftentimes I am pretty depressed. (Female, Monmouthshire)

I like the peace but having less people in my area, especially young people has made me vulnerable to loneliness during the pandemic and could do the same should I move back in the future. (Female, Carmarthenshire)

Other individuals mentioned mental health issues arising from the closeness of rural communities, or expressed dissatisfaction with mental healthcare services, or support for special learning needs or hidden disabilities. Only a few respondents cited more positive aspects of rural life for mental health, including lower stress, space for mindfulness, and benefits for sufferers from social anxiety.

Interestingly, a substantial number of both positive and negative opinions on life in rural Wales were values-based. On the one hand, appreciation of the natural environment and wildlife reflecting pro-environmental values, although a couple of respondents cited difficulties buying eco-friendly goods locally as a negative. A few respondents similarly cited a perceived absence of class stratification or less intensive consumerism as things they liked about living in rural Wales. On the other hand, the lack of diversity in the rural population and perceptions of closed-minded attitudes, homophobia and xenophobia were given as negative aspects of life in rural Wales by survey respondents, for example:

Political views etc tend to be more conservative, people are not as tolerant of minorities typically in rural areas (Female, Gwynedd)

The people can be a bit backward thinking, racist against non-Welsh, narrow minded. (Non-Binary, Conwy)

There is little opportunity to see the rest of the world and have experiences with different cultures/people as most people who are born in my village will live, work and die there, so it limits the connections the village has with communities outside of its own. (Monmouthshire)

How easily you can be shut out socially for not knowing the right people. And how closed of places can be to outsiders. (Male, Isle of Anglesey)

Many people near me are bigoted and close minded when it comes to minorities and things that are different than the norm (Male, Powys)

It's not very diverse and a lot of people have very backward views. (Female, Powys)

Homophobic, Transphobic, no good internet, inadequate services, inadequate employment opportunity, xenophobic nationalism, poorly run education. (Female, Powys)

Transphobia, homophobia, even just the idea that the majority of people I walk past when I go into town just don't know what these things are (Male, Powys)

There is a lack of diversity in age, genders, religions, beliefs. It tends to be backwards in comparison to the city. There's more racism, sexism and homophobia. (Female, Carmarthenshire)

A few respondents recounted personal experiences of discrimination due to their sexuality, or cited difficulties accessing LGBTQ+ support services or events:

Tend to experience hostility in the local community for being LGBT+ and have been an outsider (Female, Denbighshire)

I also don't like the fact that I sometimes feel more judged because I don't fit in because I'm transgender. (Male, Powys)

I need to travel quite a long way to attend LGBTQ+ events, festivals and concerts as well. (Female, Pembrokeshire)

One respondent, however, articulated a contrasting perspective, noting that:

My like of living in rural Wales comes specifically from being queer - feeling like you're occupying the space differently to how some might expect you to. In this sense, my like of rural Wales is hugely personal and to do with my own lived experience as opposed to an objective list of things about rural Wales itself as an environment. There is a sense of potentiality to living in rural Wales which I enjoy - in a way, the lack of social opportunities is what makes you value the ones you do have - or the serendipitous ones you do make - all the more special. (Male, Carmarthenshire)

Notably, the opinions on living in rural Wales of the survey respondents who identified as non-binary or were unsure of their gender did not differ significantly from those of the sample as a whole, with 70% agreeing that they enjoyed living in rural Wales and only 10.5% disagreeing.

For a significant number of young people, enjoyment of living in rural Wales is closely tied to Welsh identity and to the everyday use of the Welsh language. Over two-fifths of survey respondents indicated that they preferred to live in a Welsh-speaking community (Figure 13), including 60% of first-language Welsh-speakers, but only 20% of fluent second-language Welsh speakers (Figure 14). Of the respondents who expressed a preference to live in a Welsh-speaking community, 96% said that they enjoyed living in rural Wales and the association was further reflected in free text answers to the question of what they liked about living in rural Wales, for example:

Friendly community, Welsh-speaking community, know everyone, kind locals. (Female, Gwynedd)

Being able to live through the medium of Welsh. The local culture that I have grown up with. A quieter life, enjoying nature (Female, Gwynedd)

I love the nature, the views and the Welsh language. It all means a lot to me, and I'll always be thankful for growing up in such a beautiful area. (Female, Gwynedd)

I like the fact that it's a majority Welsh speaking area, and a strong sense of Welsh nationalism. (Male, Ceredigion)

The community I have with other people who are in touch with their Welsh identity and history (Male, Powys)

The countryside has deep history and helps provide a connection to Welsh culture (Non-Binary, Ceredigion)

The quietness, the presence of the Welsh language, the community, feeling safe (Female, Ceredigion)

Tranquillity, a close-knit (and Welsh-speaking) community, greenery, getting to know nature and our country better. (Male, Gwynedd)

Quiet and a place to walk and get some fresh air. The Welsh community element is also important. (Male, Carmarthenshire)

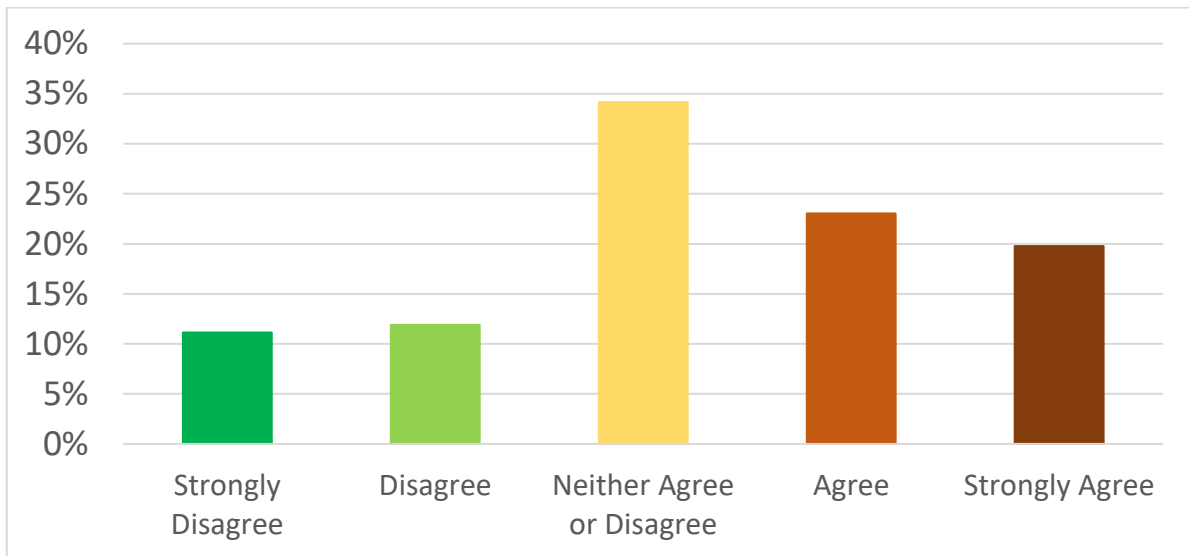


Figure 13: Survey responses to the statement 'I would prefer to live in a majority Welsh-speaking community' (n=1042)

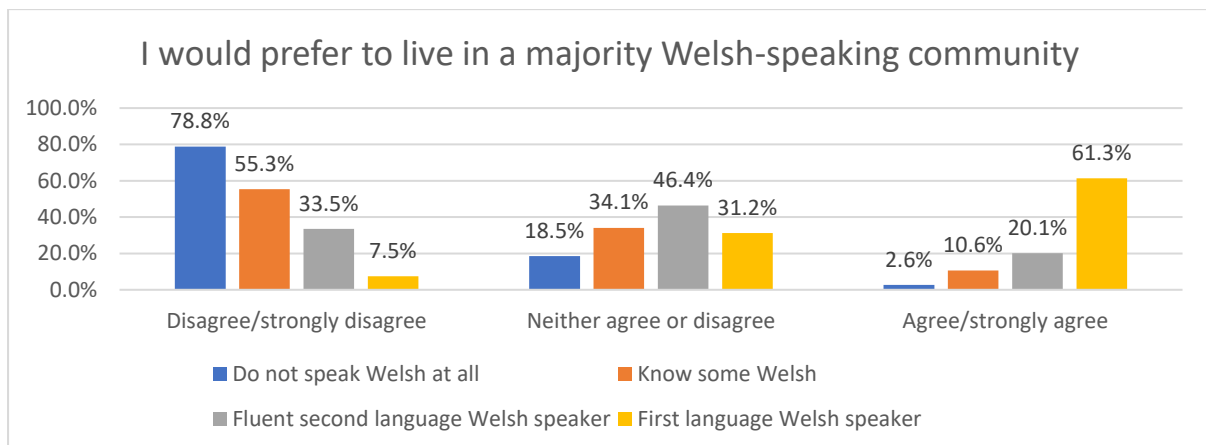


Figure 14: Preference for living in a Welsh-speaking community by language competence

First language Welsh speakers are more likely than young people as a whole to enjoy living in rural Wales, to want to stay in their local area all their lives, to plan to move back later in life if they have to move away, and to think that employment opportunities, public services and social and cultural opportunities in their local area are good. A third of first language Welsh speakers agreed that public services in their local area met their needs, compared with a quarter of respondents overall (Figure 15); even more strikingly, more than a third of first language Welsh speakers agreed that there were good social and cultural opportunities for them in their local area, compared with less than a fifth of other respondents (Figure 16). The difference between first language Welsh speakers and fluent second language Welsh speakers is especially notable, suggesting that language competence per se is not the

differentiating factor, but rather that first language is part of a cultural community identity that affects sense of belonging and perceptions of life in the Welsh countryside.

Equally, it is important to note that 14% of young people living in rural Wales responding to the survey do not know any Welsh. This group are less likely than the sample as a whole to enjoy living in rural Wales, less likely to think that there are good social and cultural opportunities for them locally, less likely to want to return to their local area if they move away, more likely to be concerned about finding a job locally, and more likely to say that they would prefer to live in a larger town or city. There is an unsurprising overlap between this group and those not wanting to live in a majority Welsh-speaking community, and it is noteworthy that respondents who strongly disagreed with the statement ‘I would prefer to live in a majority Welsh-speaking community’ are the most dissatisfied with rural life, with only 50% saying that they enjoy living in rural Wales and 26% disagreeing.

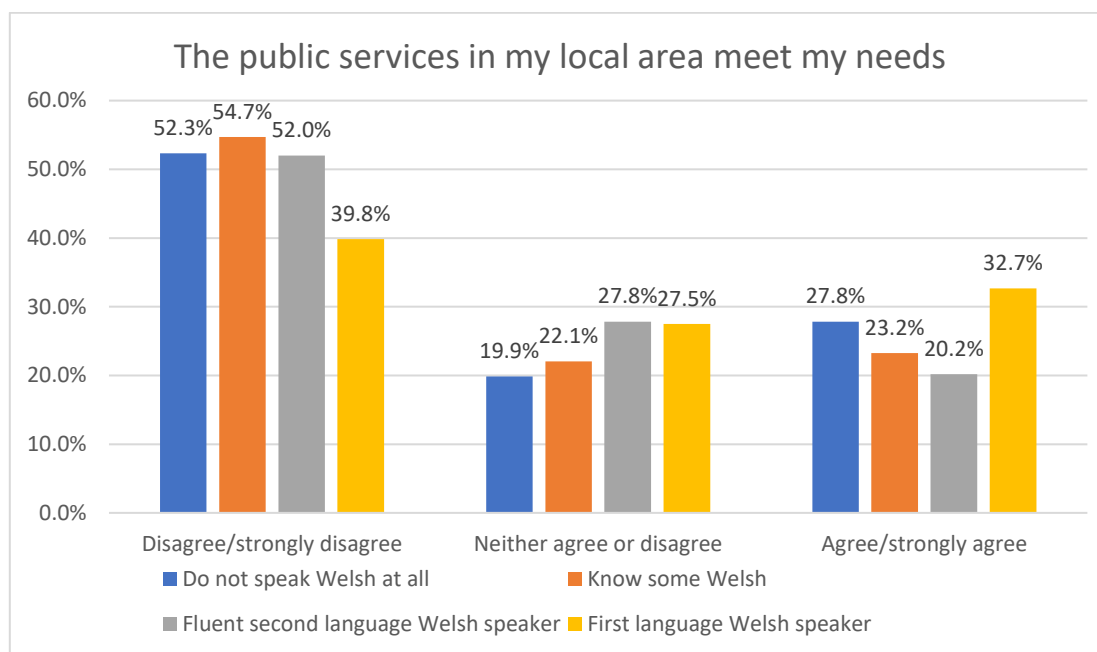


Figure 15: Survey responses on public services in their local area by language competence (n=1055)

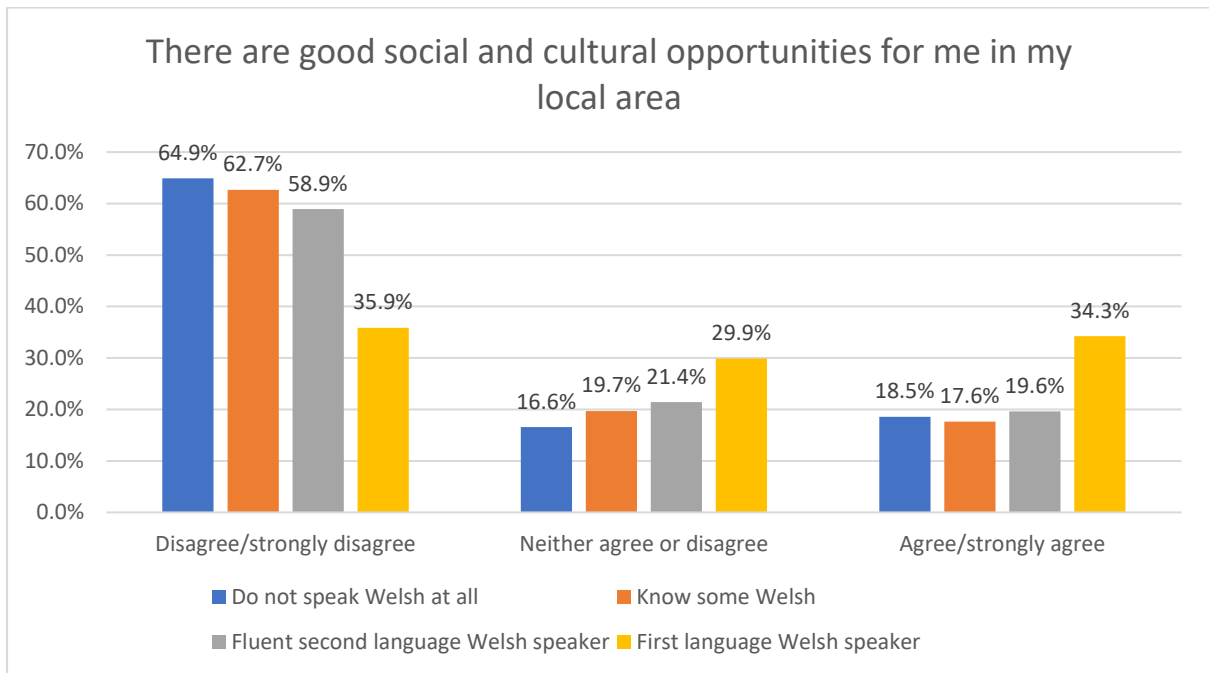


Figure 16: Survey responses on social and cultural opportunities by language competence (n=1054)

Housing and the Labour Market

Employment opportunities and access to housing are commonly cited as critical push-factors in debates over youth out-migration from rural Wales and were frequently cited by survey respondents in relation to what they did not like about living in rural Wales. Overall, 59% of respondents stated that they were concerned about being able to afford to buy a house in their local area, while only a fifth were not concerned (Figure 17). The highest levels of concern are among respondents aged 22 or over (69%), first-language Welsh-speakers (69%) and young people living in open countryside (64%), as opposed to villages or small towns (Figures 18 and 19).

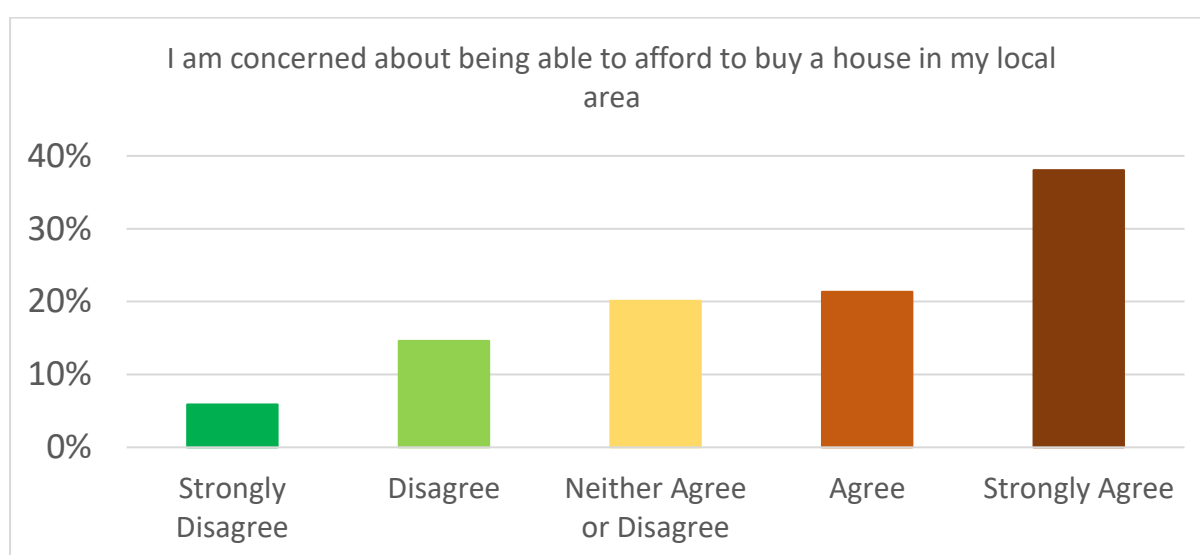


Figure 17: Survey responses to the statement 'I am concerned about being able to afford to buy a house in my local area' (n = 1054)

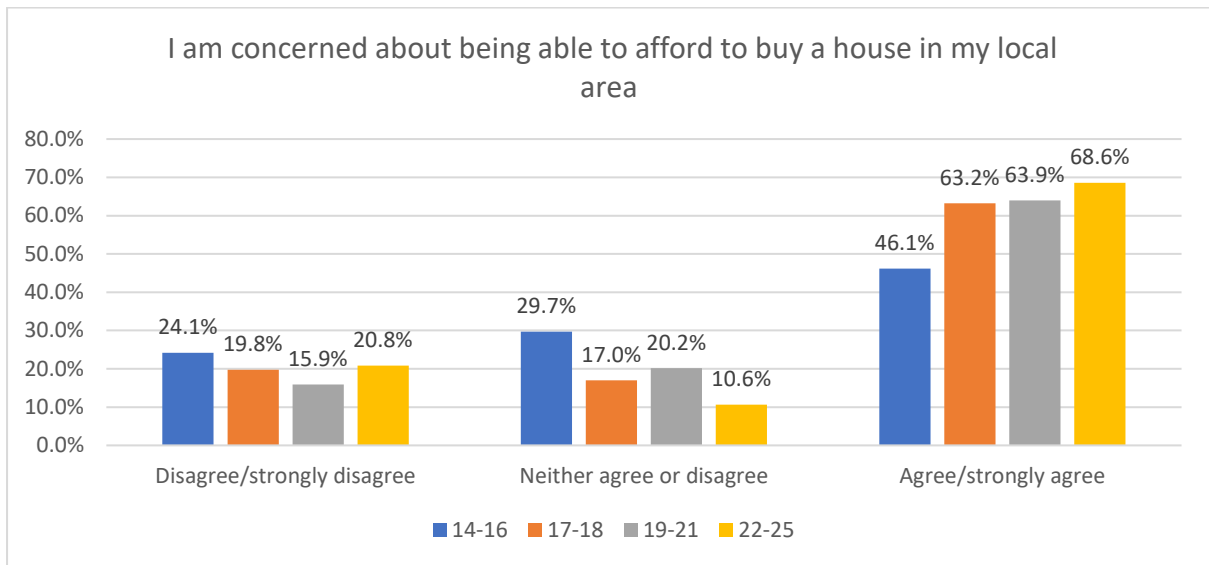


Figure 18: Survey responses on concerns about housing affordability by age group

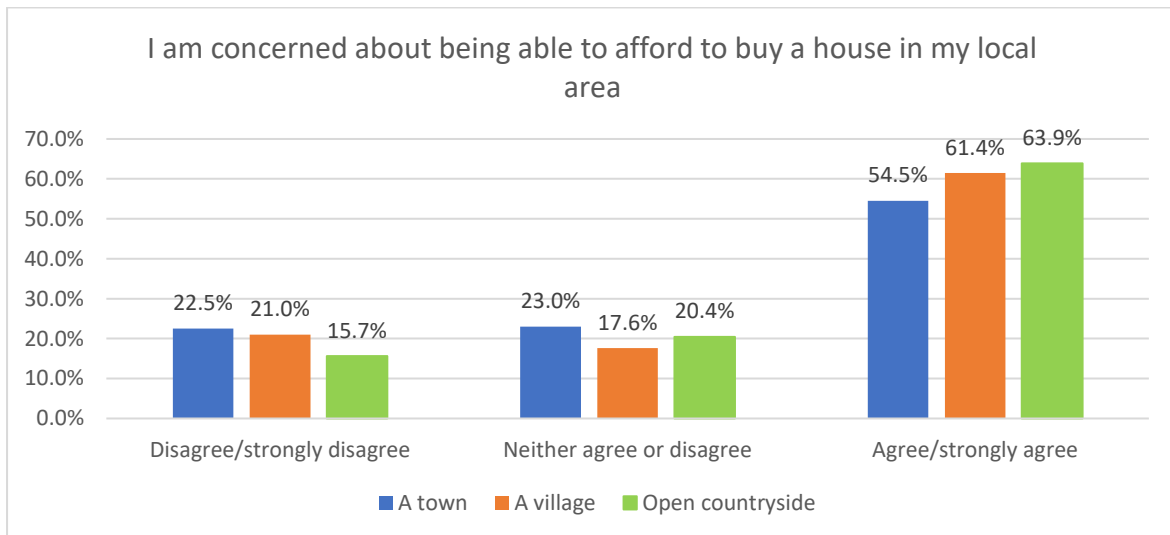


Figure 19: Survey responses on concerns about housing affordability by location of home

Concerns about housing affordability are held by a majority of young people in most parts of rural Wales, but there are some variations between counties. The most widespread concern is in Pembrokeshire, where 69% of survey respondents agreed that they were concerned about being able to afford to buy a house in their local area, and Conwy (68%). Powys is the only county where fewer than half of respondents agreed that they were concerned about housing affordability, at 49% (Figure 20).

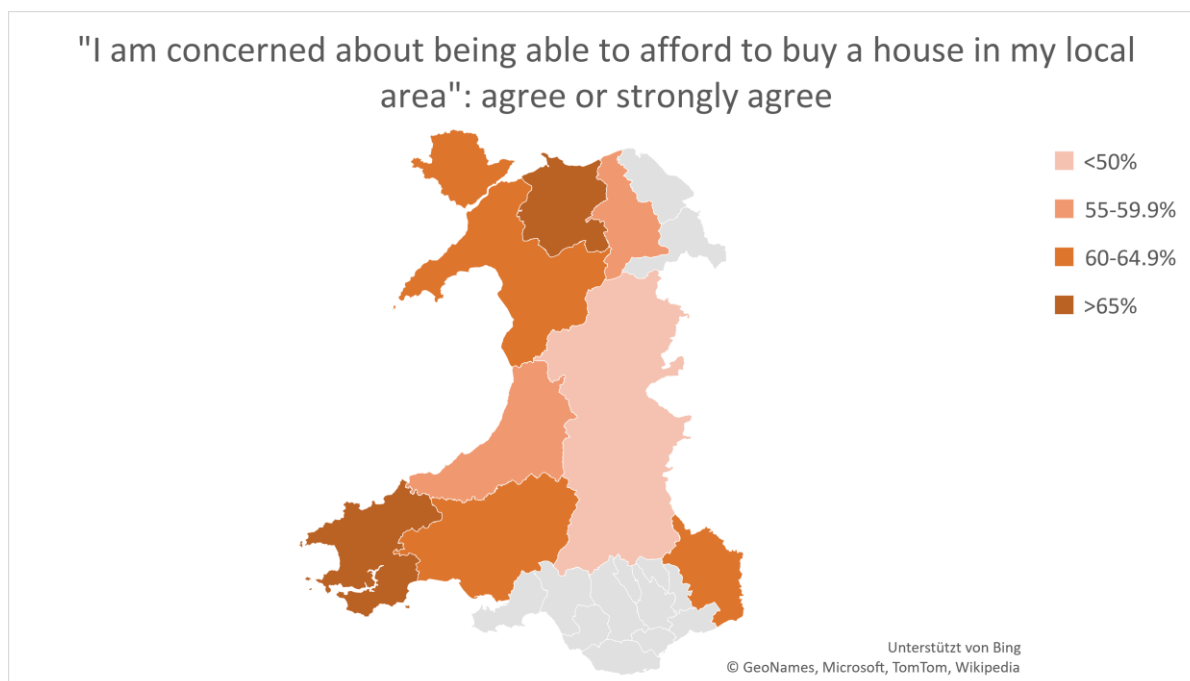


Figure 20: Survey responses on concerns about housing affordability by county

Intriguingly, geographical variations in young people's concerns over housing affordability do not correspond with variations in either median house prices or the ratio of house prices to local earnings, as Table 2 shows. Conwy has the second highest level of concern about housing affordability, but only the 6th highest house prices out of the nine predominantly rural counties in Wales. Ceredigion, conversely, has the second least affordable ratio of prices to earnings, but the proportion of survey respondents saying that they were concerned about housing was third from bottom. Powys registered the lowest level of concern about housing among survey respondents but has the second highest median house prices in rural Wales, and the fourth worst ratio of house prices to earnings.

As such, young people's concerns about housing are not just shaped by property prices, but also by housing supply – explaining the higher concern among respondents living in open countryside – and by discourses circulating in local media and politics around housing and especially the impact of in-migration and second homes. These ideas were reflected in comments about what survey respondents didn't like about living in rural Wales:

Entitled tourists. Landlords make it impossible for local folk to pull themselves from poverty and available houses are just bought by more landlords, or English folk looking to make quick money off AirBnB. (Non-Binary, Gwynedd)

No affordable housing now that it's becoming a more desirable holiday destination and a second home owner haven. It feels like residents are forced to head South or to England, even if they'd like to buy here. (Female, Ceredigion)

	% of survey respondents concerned about housing affordability	Median house price, August 2021 (£)	Ratio median house price : median earnings, 2019
Pembrokeshire	68.6%	210,647	7.10
Conwy	68.4%	200,292	6.84
Monmouthshire	63.8%	313,167	8.74
Carmarthenshire	61.3%	184,900	5.46
Gwynedd	60.9%	189,112	6.63
Isle of Anglesey	60.8%	211,474	6.77
Ceredigion	59.2%	220,291	7.32
Denbighshire	57.8%	181,413	5.65
Powys	49.2%	221,646	6.90

Table 2: Survey respondents agreeing with the statement that they are concerned about being able to afford to buy a house in their local area by county, compared with median house prices and housing affordability ratio. (Sources: Land Registry, ONS)

Housing prices have also rocketed, more so over COVID, being bought up by past holiday makers and would be holiday rentals. It just simply is not affordable. (Female, Powys)

I feel some houses in the area are actually advertised for people to buy as holiday home, or to rent as AirBnB at times. (Female, Gwynedd)

Although 21% of survey respondents indicated that there were not concerned about being able to afford to buy a house locally, only one respondent mentioned ‘cheap housing’ as among the things that they liked about living in rural Wales. More commonly, comments by respondents attributed their fears about housing to the combination of relatively high prices and relatively low wages in the local economy:

No opportunities and house prices are out of my reach and I work full-time (Male, Gwynedd)

Lack of job opportunities and opportunities to earn an affordable and dignified living. I want to earn enough that I can take out a mortgage on a property, to be able to travel. Any job I could get at home just would not be able to do this for me and there are a significant lack of opportunities to do so. (Female, Powys)

It also makes it difficult to think of buying a house with prices in my area so high in price. We currently rent, and the thought of trying to save a deposit for a house in the same village actually causes stress and anxiety for me. very unrealistic prices compared to the wage and price of living in this area. They do not match. (Female, Gwynedd)

More broadly, only 22% of survey respondents agreed that employment opportunities in their local area were good, and 63% were concerned about finding a suitable job locally (Figures 21 and 22). Men tend to be slightly more positive than women about both the local labour market overall and their own individual job prospects. First language Welsh speakers are more positive about local labour markets than young people overall, with 28% agreeing that employment opportunities are good in their local area (and 46% disagreeing), and slightly less concerned about their individual job prospects, with 58% saying that they are concerned

about finding a suitable job in their local area (Figure 23). Perceptions of local employment opportunities are most positive in Monmouthshire and Powys, where a quarter of respondents think they are good, contrasting with Denbighshire, where only 16% of respondents agreed. Slightly fewer respondents in Monmouthshire and Powys were relatedly concerned about finding a suitable job locally, with the highest levels of concern in Pembrokeshire (68% of respondents), Conwy (67%) and Carmarthenshire (68%) (Figure 24).

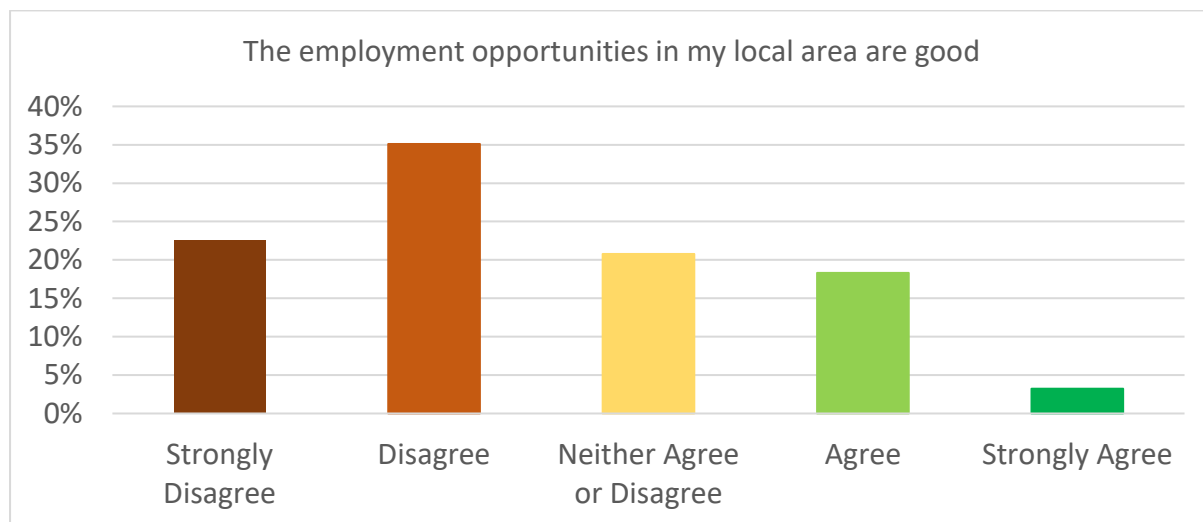


Figure 21: Survey responses to the statement ‘The employment opportunities in my local area are good’ (n=1054)

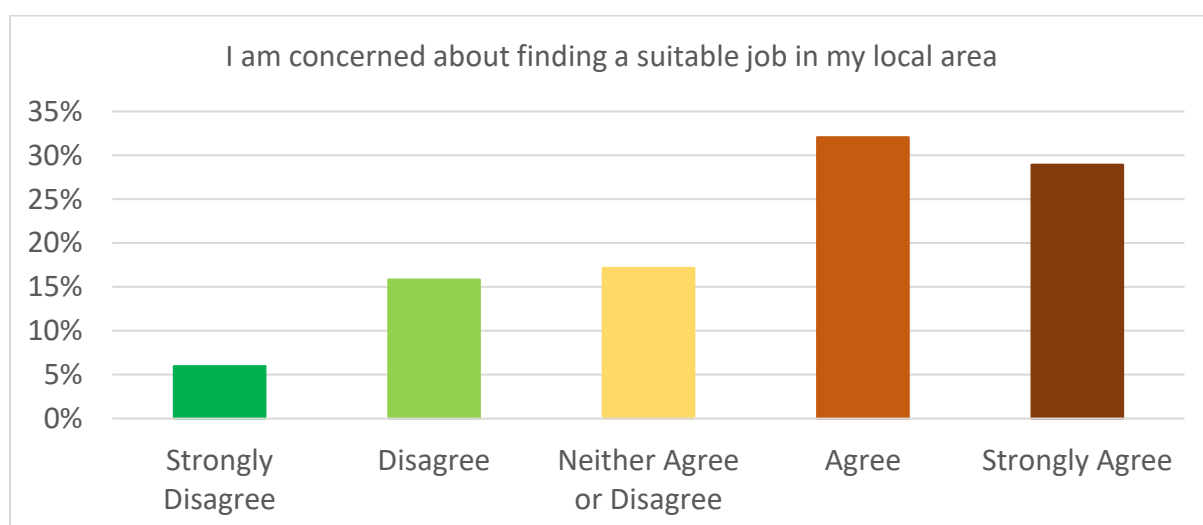


Figure 22: Survey responses to the statement ‘I am concerned about finding a suitable job in my local area’ (n=1054)

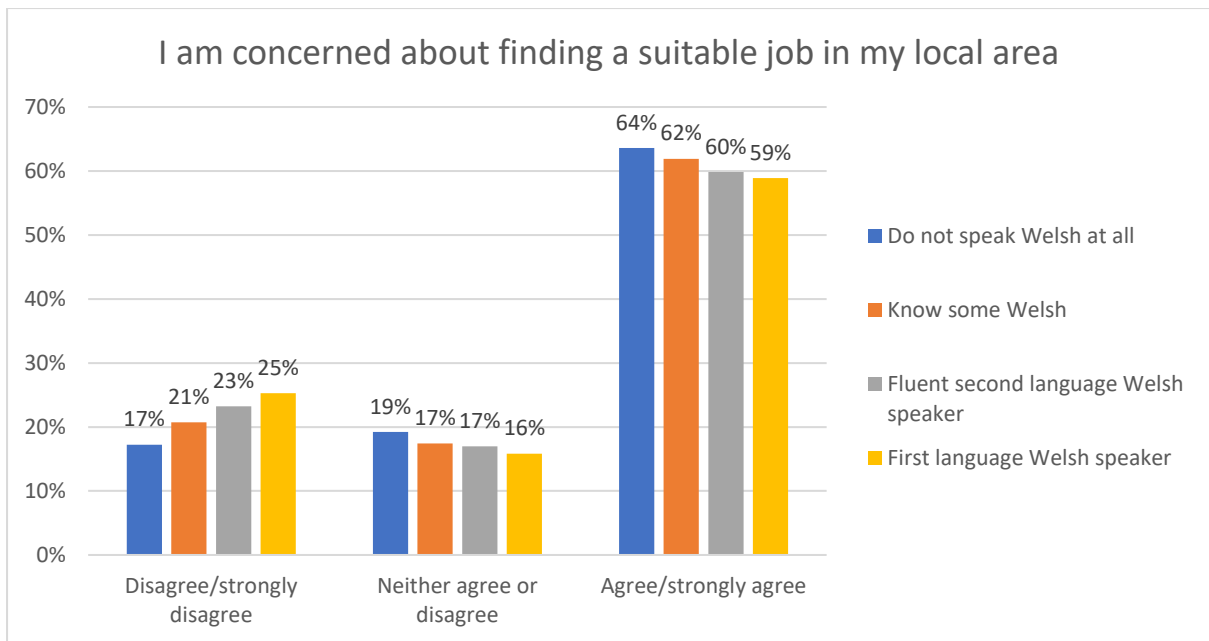


Figure 23: Concerns about finding a suitable job locally by language competence

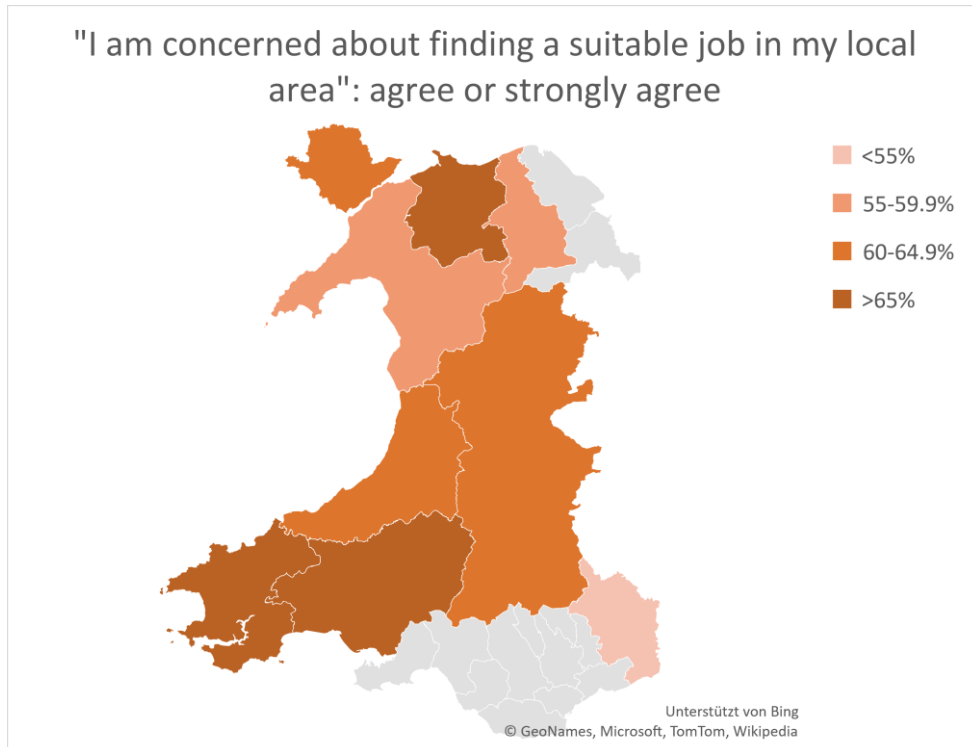


Figure 24: Survey respondents expressing concern about finding a suitable job in their local area, by county.

Concerns about finding suitable employment are also differentiated by age, education and the economic sector of interest to the respondent. A few survey respondents identified opportunities in relevant jobs for their interests as positive aspects of living in rural Wales, including one in Conwy who noted that there were “lots of job opportunities - currently work part time in tourism and learning farming”. A participant in a group discussion session in Ceredigion similarly felt that as they were pursuing a career in catering there were good work opportunities available to them locally. At the same time, there was also awareness of the precarity of jobs in sectors such as tourism and hospitality, as well as the narrowness of jobs offer:

The only downside of living in a rural area is that opportunities in all areas are limited here and to get a job we usually have to travel. I'm in a full time job at the moment but when the contract ends I am worried about finding work I want to be in that is local - which is sad because I never want to leave here. (Female, Gwynedd)

Zero career progression unless you want to be a teacher or farmer (Female, Powys)

In particular, limited opportunities for graduate-level employment and jobs in creative industries were cited as negative aspects of living in rural Wales by survey respondents:

There are few job opportunities for somebody that has been through higher education. When applying for jobs it often seems to be more about who you know in the local area rather than your skills or experience (Female, Pembrokeshire)

The lack of opportunities for artists, a lack of careers rather than part time jobs. I can't put my degree to use here. (Female, Pembrokeshire)

Current students in higher education completing the survey tended to be more critical of employment opportunities in their home area and more pessimistic about their individual job prospects than respondents as a whole, with 73% saying that they are concerned about finding a suitable job in their local area (Figure 25). More than 88% of current HE students agreed with the statement that they would need to move away from their local area for education, training, or employment – whilst some may have interpreted this as including their present studies at university, it also likely reflects that suitable graduate-level jobs will not be available in their home area.

However, it is not only graduate level jobs that are an issue. The only group more negative about the rural labour market than university students were respondents currently in other form of training, such as apprenticeships or vocational training. Only, 14% of this group thought that local employment opportunities were good, with 71% disagreeing; 86% were concerned about finding a suitable job in the local area; and 86% think that they will need to move away for employment or training.

At the same time, although respondents currently in employment (and not also studying) were generally less negative than peers about their job prospects, 65% still disagreed that local employment opportunities were good, 57% were concerned about finding a suitable job, and two-thirds still thought that they would need to move away for employment, pointing to problems with the quality and security of jobs in rural Wales more than the quantity (only 4%

of survey respondents were unemployed, below the Wales and UK averages). This includes graduates who have returned to their home area after university, as well as young people who have gone into work rather than higher education. Indeed, 72% of respondents aged 21 or over agreed with the statement that they would need to move away from their local area for education, training, or employment.

In contrast, respondents who were still at school were the most positive about local employment opportunities and the least concerned about finding a suitable job, either because the issue is less immediate to them, or because they interpreted the question in relation to finding part-time work, with tourism provided some options for seasonal or weekend employment.

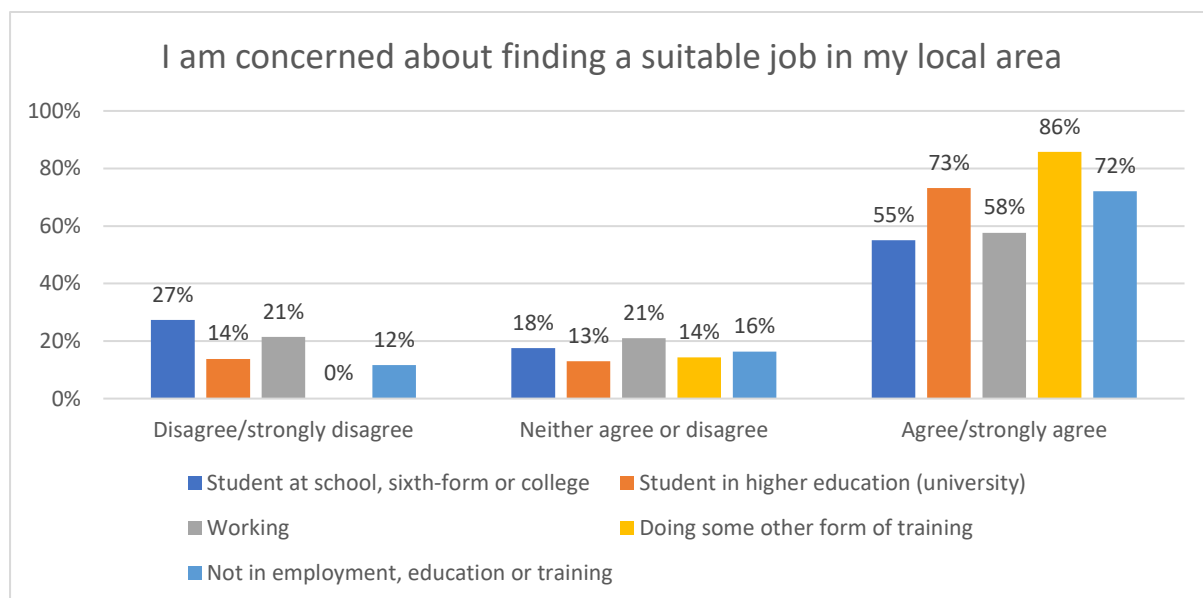


Figure 25: Concerns about finding suitable employment by current education or work status (n=1051)

Migration and Future Plans

Young people's experiences of living in rural Wales and their concerns around finding work and housing feed into their decisions about whether to stay in their local area or to move away. More than eight in ten survey respondents think that they will need to move away from their local area for work, education, or training, with only 8% believing that they will not need to move (Figure 26). Housing is a little less significant as a driver of out-migration, with just under half of respondents believing that they will need to move to find suitable, affordable housing, and just under a quarter disagreeing (Figure 27).

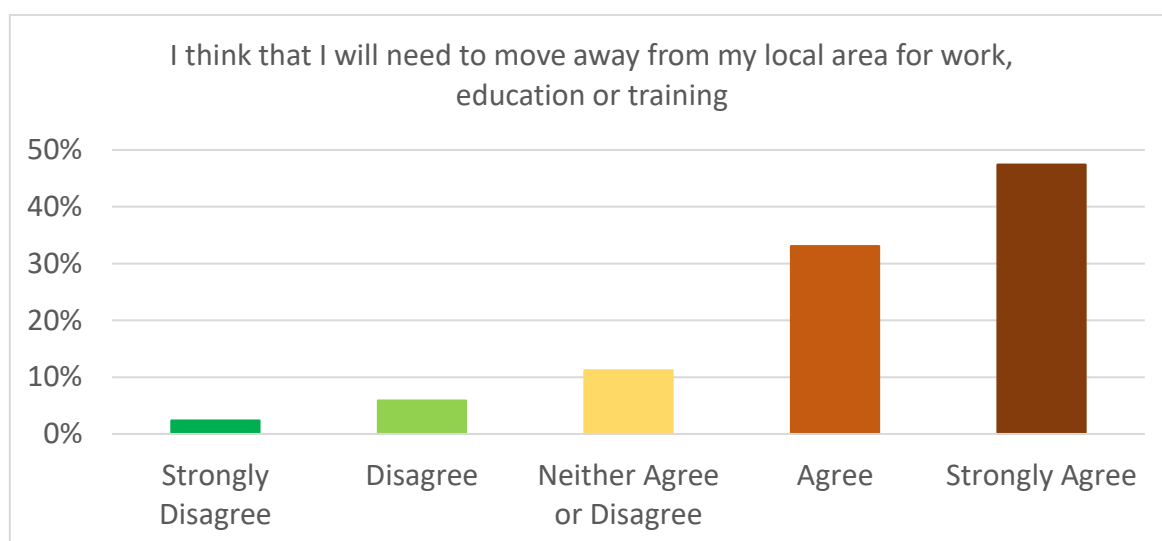


Figure 26: Survey responses to the statement 'I think that I will need to move away from my local area for work, education or training' (n=1052)

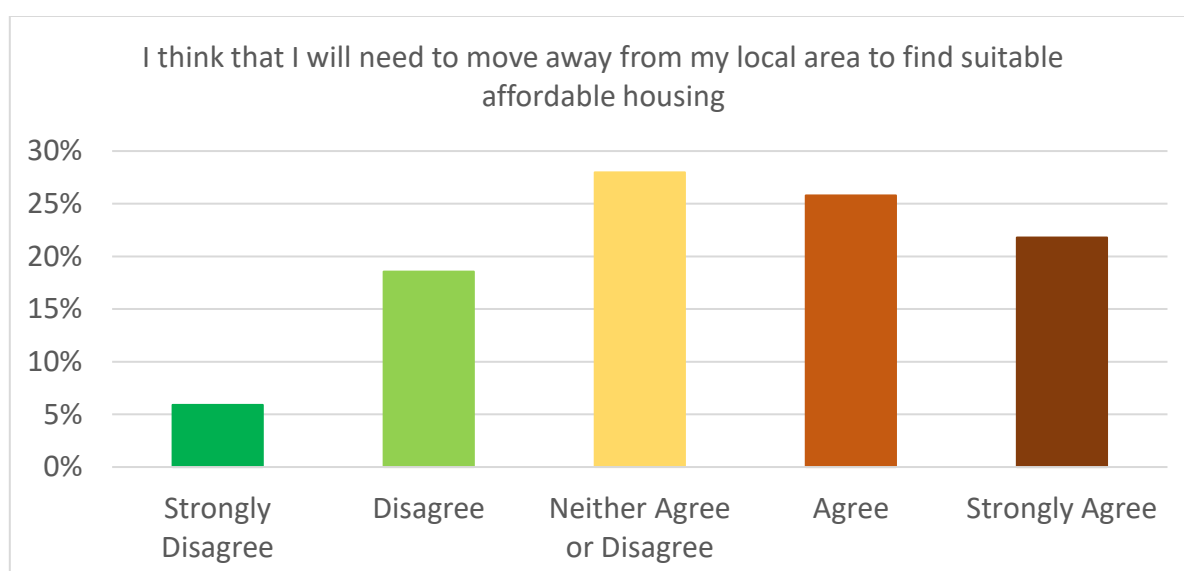


Figure 27: Survey responses to the statement 'I think that I will need to move away from my local area to find suitable affordable housing' (n=1051)

The perceived need to move away for employment, education and training is fairly universally held across all sub-groups. Indeed, noting that survey respondents were asked to score their response to the statement on a scale of 1 (strongly disagree) to 5 (strongly agree), this was the question in the survey where answers were mostly heavily weighted towards the ‘strongly agree’ category (Figure 28). In contrast, responses to the statement ‘I think that I will need to move away from my local area to find suitable, affordable housing’ were weighted more towards the ‘agree’ (4) and ‘neither agree nor disagree’ (3) options.

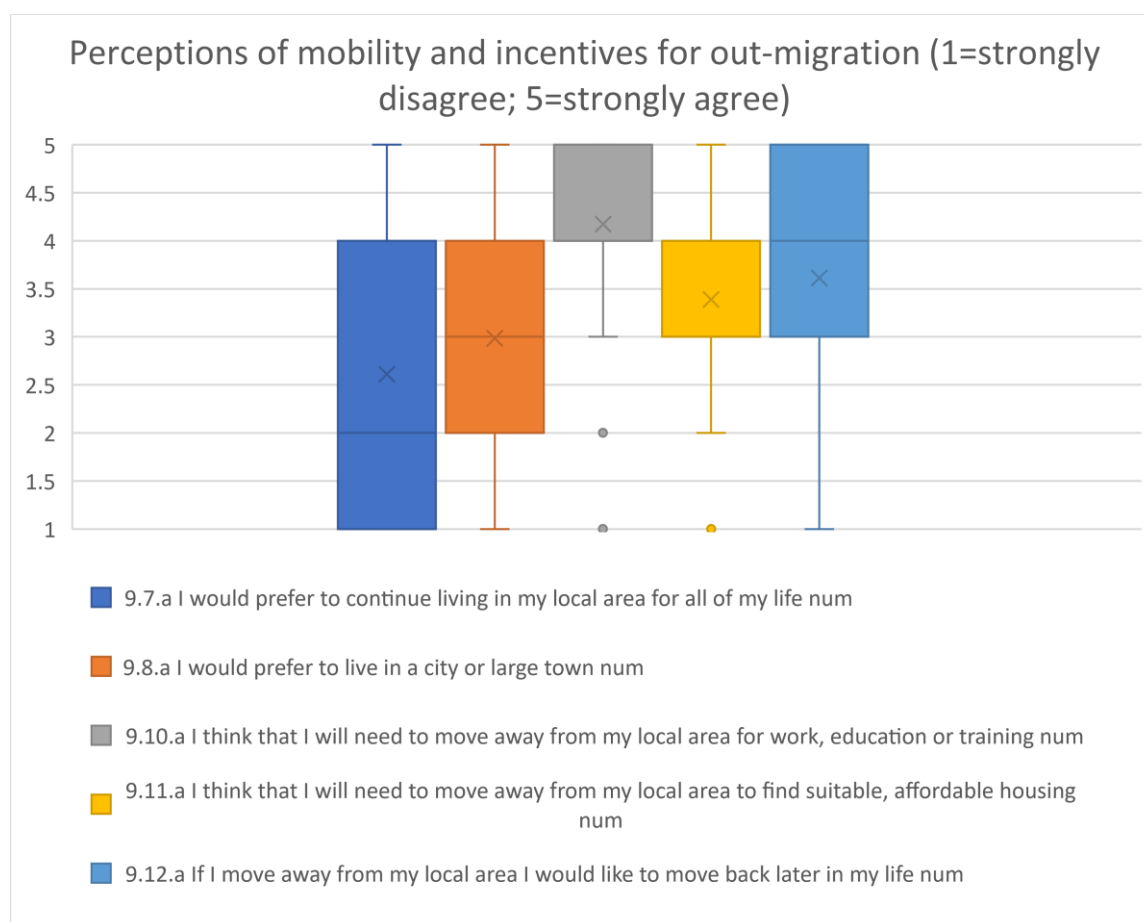


Figure 28: Weighting given by survey respondents to answers on statements concerning migration

Women are slightly more likely to think that they will need to move for employment, education, or training than men, and unsurprisingly, young people aged between 17 and 21, concurrent with study in sixth form or at university, are more likely to agree than respondents who are older or younger. Nearly nine in ten respondents (88%) who are currently studying at university think that they will need to move from their local area for employment, education, or training, but so do 85% of respondents in other forms of training, such as

vocational training (Figure 29). Conversely, respondents aged 22 or older were less likely to think that they would need to move for work, education, or training, as were respondents in employment – although, notably, two-thirds of respondents currently working in rural Wales still thought that they would need to move away for employment, education, or training.

First language Welsh-speakers are slightly less likely to think that they will need to move away for employment, education, or training than fluent second language speakers or those who know some Welsh (but not respondents who do not speak Welsh at all). Geographical differences are slight, with the highest proportions of respondents believing they will need to move away in Pembrokeshire (87%) and Monmouthshire (86%) and the lowest in Anglesey (77%) (Figure 30).

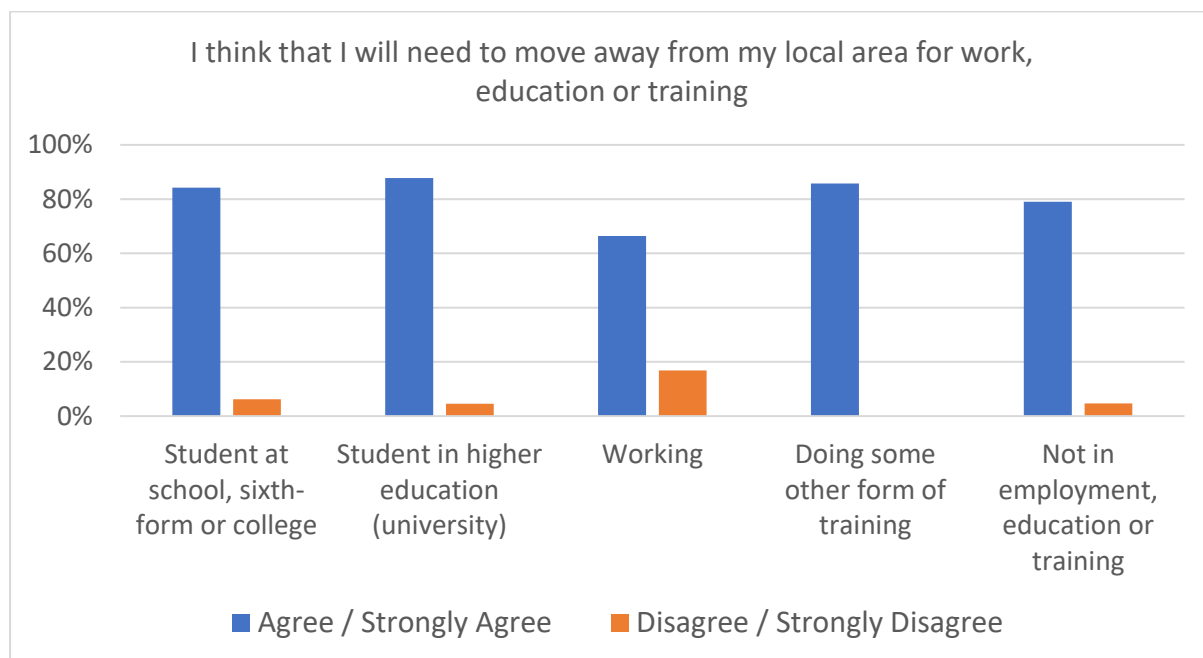


Figure 29: Responses to the statement ‘I think that I will need to move away from my local area for work, education or training’ by current employment/education status (n=1052)



Figure 30: Survey respondents agreeing that they will need to move away for work, education or training, by local authority area.

Perceptions around housing as a reason for out-migration are more differentiated geographically and reflect concerns about being able to afford to buy a house in the local area, reported in the previous section. Survey respondents agreeing that they will need to move away from their local area to find suitable affordable housing range from 62% in Pembrokeshire and 57% in Monmouthshire, to 43% in Ceredigion and 38% in Powys (Figure 31). Indeed, in Powys, whilst 38% agreed that they would need to move away for housing, 34% disagreed, a margin of only 4%, whereas in Pembrokeshire the gap is 41%. More than half of the respondents living in villages or open countryside think that they will need to move to find suitable affordable housing, compared with 42% of the respondents living in towns.

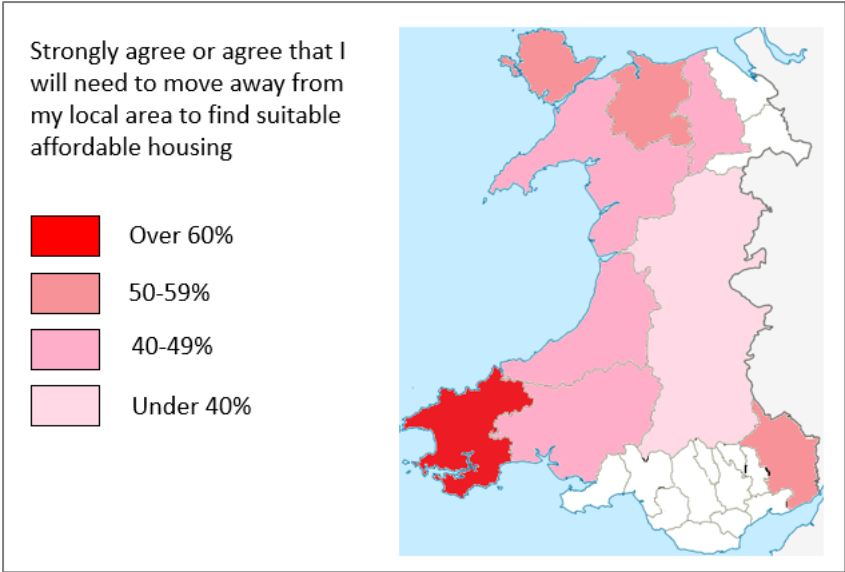


Figure 31: Survey respondents agreeing that they will need to move away to find suitable affordable housing, by local authority area.

There is also a notable difference in responses to this question by the current education or employment status of young people. Fewer than half of the respondents who are currently students in school, college or university think that they will need to move away to find housing, compared with more than half of those currently working or not in employment, education, or training, and nearly three-quarters of those doing some other form of training (Figure 32). This may indicate that thinking about long-term housing is a less immediate concern for young people who are still studying, or it may reflect expectations about future earnings, with those either currently experiencing or anticipating lower earnings believing that they will be priced out of rural housing markets.

Interestingly, given concerns in public debates around links between housing affordability and the erosion of majority Welsh-speaking communities, first language Welsh speakers are slightly more likely than other respondents to believe that they will need to move away from their local area to find suitable affordable housing (Figure 33). In contrast, young people who do not speak Welsh were broadly as likely to disagree with the statement that they would need to move for housing than agree with it.

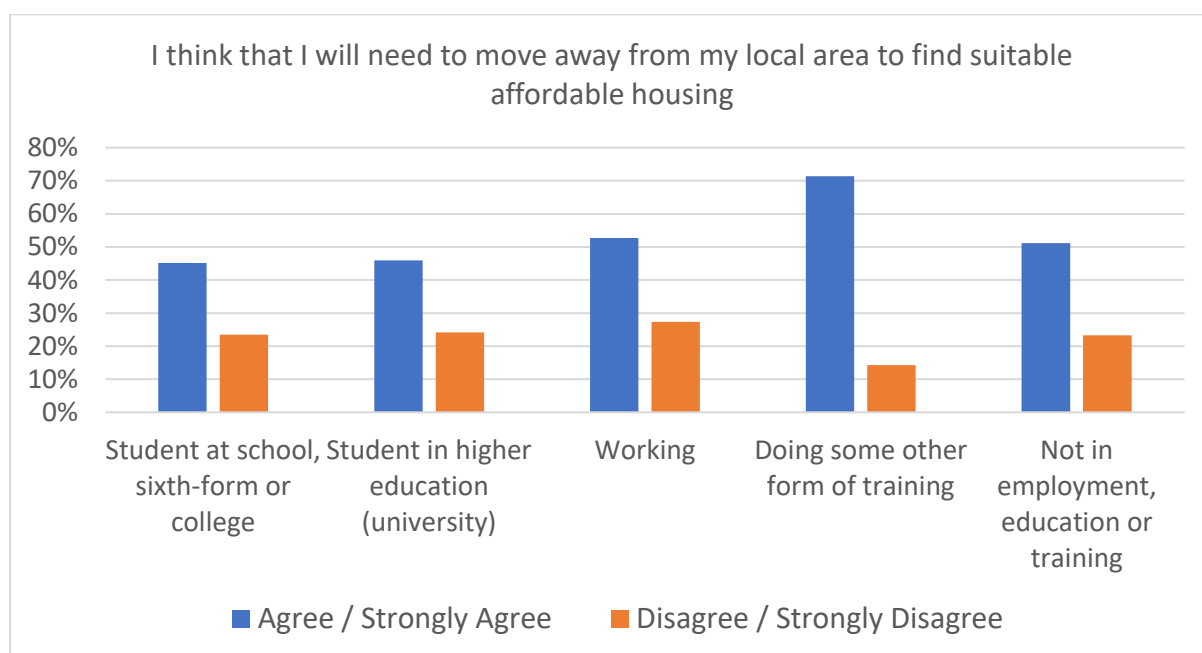


Figure 32: Responses to the statement ‘I think that I will need to move away from my local area to find suitable affordable housing’ by current employment/education status (n=1052)

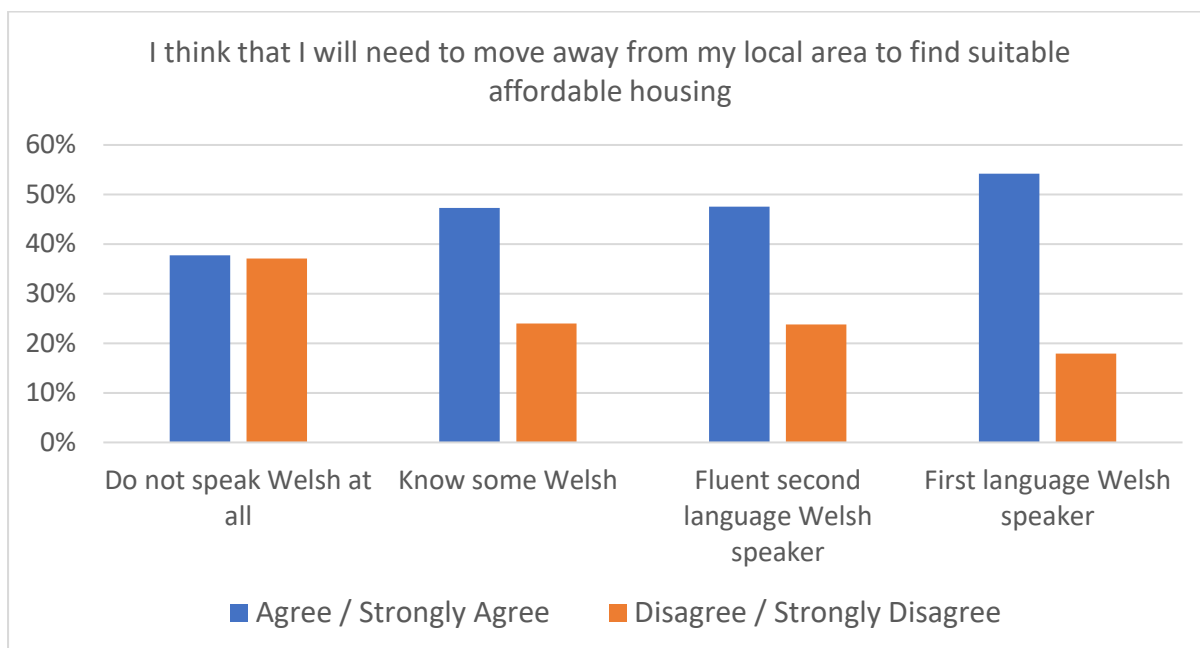


Figure 32: Responses to the statement ‘I think that I will need to move away from my local area to find suitable affordable housing’ by language competence (n=1052)

The survey findings that most young people enjoy living in rural Wales but that a majority believe that they will need to move away in order to find work or housing, or for education or training, may suggest that youth out-migration is to some degree involuntary and that most would stay if the right opportunities were available. However, this interpretation only partially captures the full picture and dismisses the extent to which many young people who enjoy living in rural Wales nonetheless *want* to move away, at least for a period.

When asked about their preferences for places to live, only a quarter of survey respondents agreed that they would prefer to live in their local area for all of their life, compared with half who disagreed (Figure 33). From the contrasting perspective, two in five respondents indicated that they would prefer to live in a large town or city, with a similar proportion disagreeing (Figure 34). A small number of respondents, 8%, do not want to live in the local area all their lives, but also do not want to live in a large town or city, which may show a preference for moving to a different rural area.

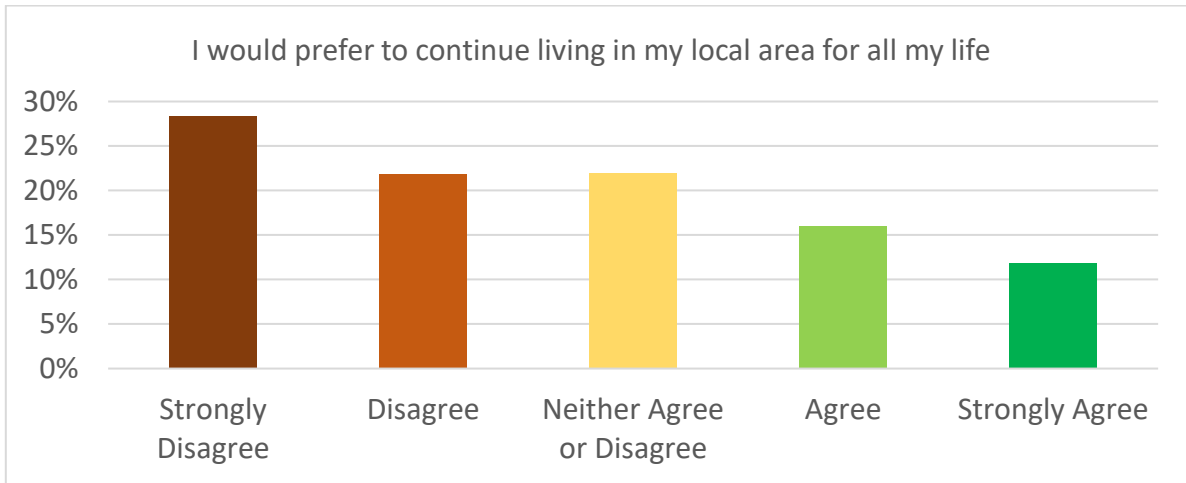


Figure 33: Survey responses to the statement 'I would prefer to continue living in my local area for all my life' (n=1052)

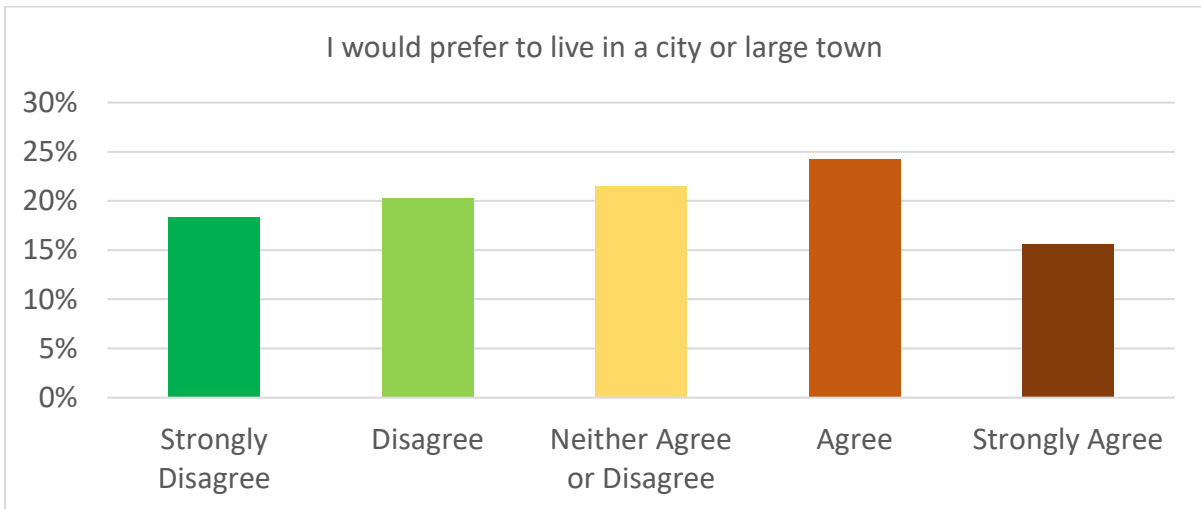


Figure 34: Survey responses to the statement 'I would prefer to live in a city or large town' (n=1052)

Preference for staying in the local area increases with age, with 38% of respondents aged 22 or older agreeing (largely because many peers wishing to move have already done so), compared with 21% of 14-16 year olds. Men are slightly more likely than women to want to stay in the local area, as are respondents who live in the open countryside compared with those who live in villages or towns. First language Welsh speakers are almost twice as likely to want to continue living in the local area than other respondents (Figure 35). There are also significant geographical variations, with 57% of respondents in Conwy preferring to stay in the local area, but only 16% of respondents in Monmouthshire (Figure 36).

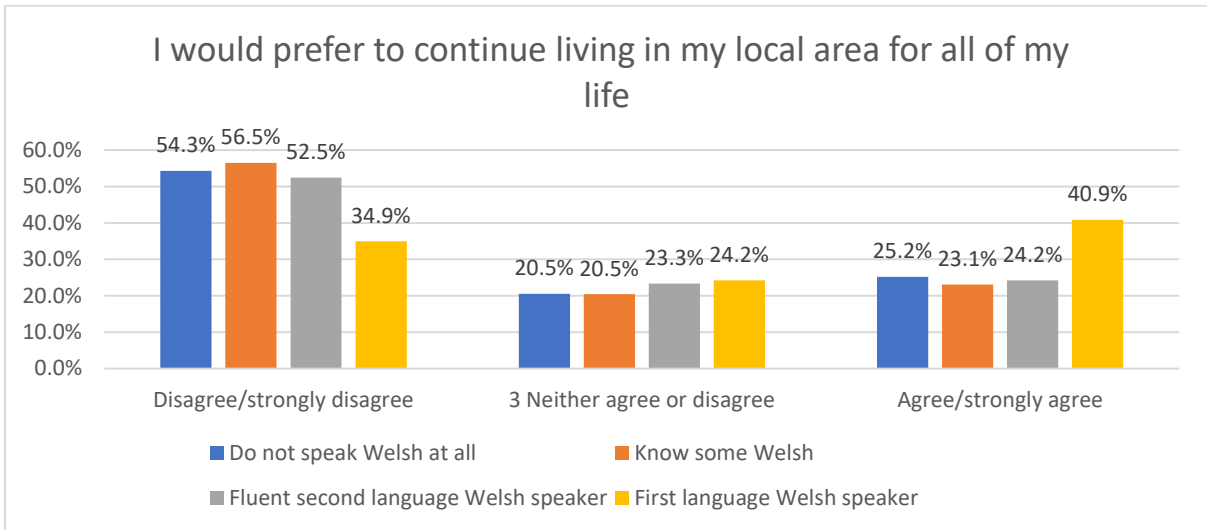


Figure 33: Survey responses to the statement 'I would prefer to continue living in my local area for all my life' by language competence (n=1051)

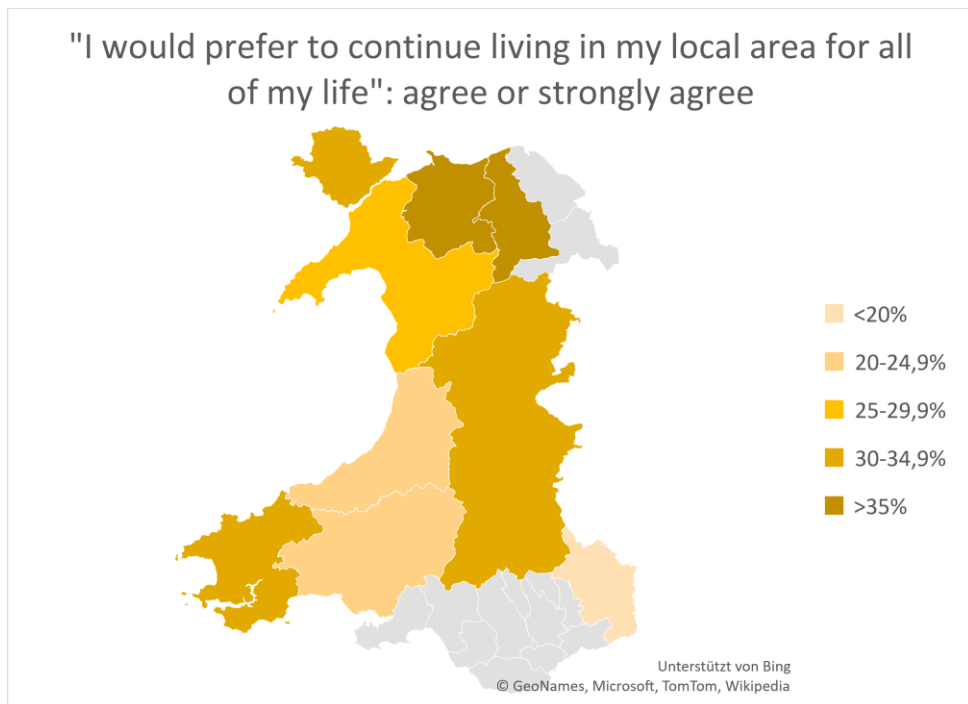


Figure 34: Survey responses with preference to stay living in their local area, by county

Preference for living in a large town or city is highest among young people who identify as non-binary or are unsure about their gender (49%), non-Welsh speakers (48%) and respondents who are in school, sixth form or college (45%). Respondents who live in the open countryside (26%), first language Welsh speakers (31%), and those who are in other forms of training (14%) are least likely to say that they would prefer to live in a large town or city. There is also an evident north-south divide, with around half of respondents in Ceredigion,

Monmouthshire and Pembrokeshire stating that they would prefer to live in a large town or city, compared with around a quarter in Conwy and Denbighshire (Figure 37).

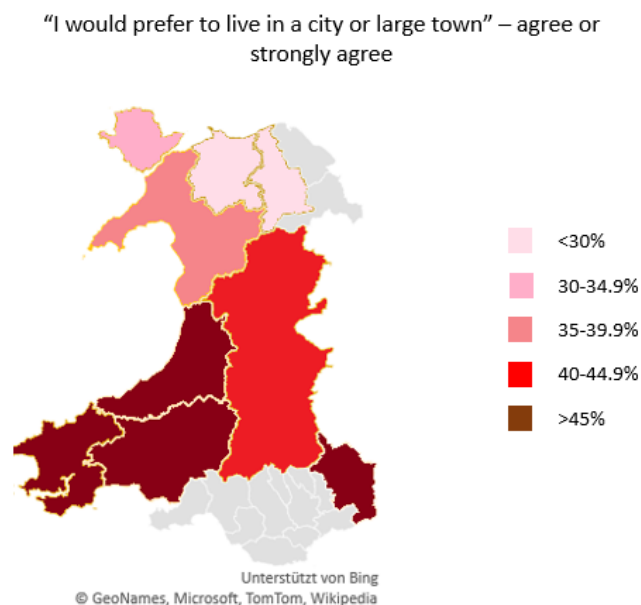


Figure 35: Survey responses with preference to live in a city or large town, by county

The survey figures on migration preferences and expectations can be combined to produce a more nuanced overview of the potential mobility of young people in rural Wales, as shown in Figure 36. Only 6% of young people both would prefer to stay in their local area and don't think that they will need to move away for work, education, or housing. A further 4% are neutral about staying in their home area, but similarly don't think that they will need to move away. Together these form a group of **'likely stayers'** that constitutes around one in ten young people currently living in rural Wales. At the other extreme, half of survey respondents do not want to stay in their local area, forming a group of **'intending leavers'**. About two-thirds of these (or one third of the overall sample) would ideally prefer to live in a city or large town. In the middle are young people who would prefer to remain in their home area but believe that they will need to move for work, education and/or housing. These constitute about 22% of the survey respondents and may be described as **'reluctant leavers'**. As they would likely opt to remain in their home area if the appropriate opportunities were available, they additionally form a group of **'potential stayers'** together with 19% of the sample who are neutral about staying in their home area but feel that they will need to move for work, education or housing. If the survey respondents are representative of young people in rural Wales overall, the total pool of **'potential stayers'** is around 41,000 young people, who at present are likely to move away from their local area but who could stay if appropriate conditions were created.

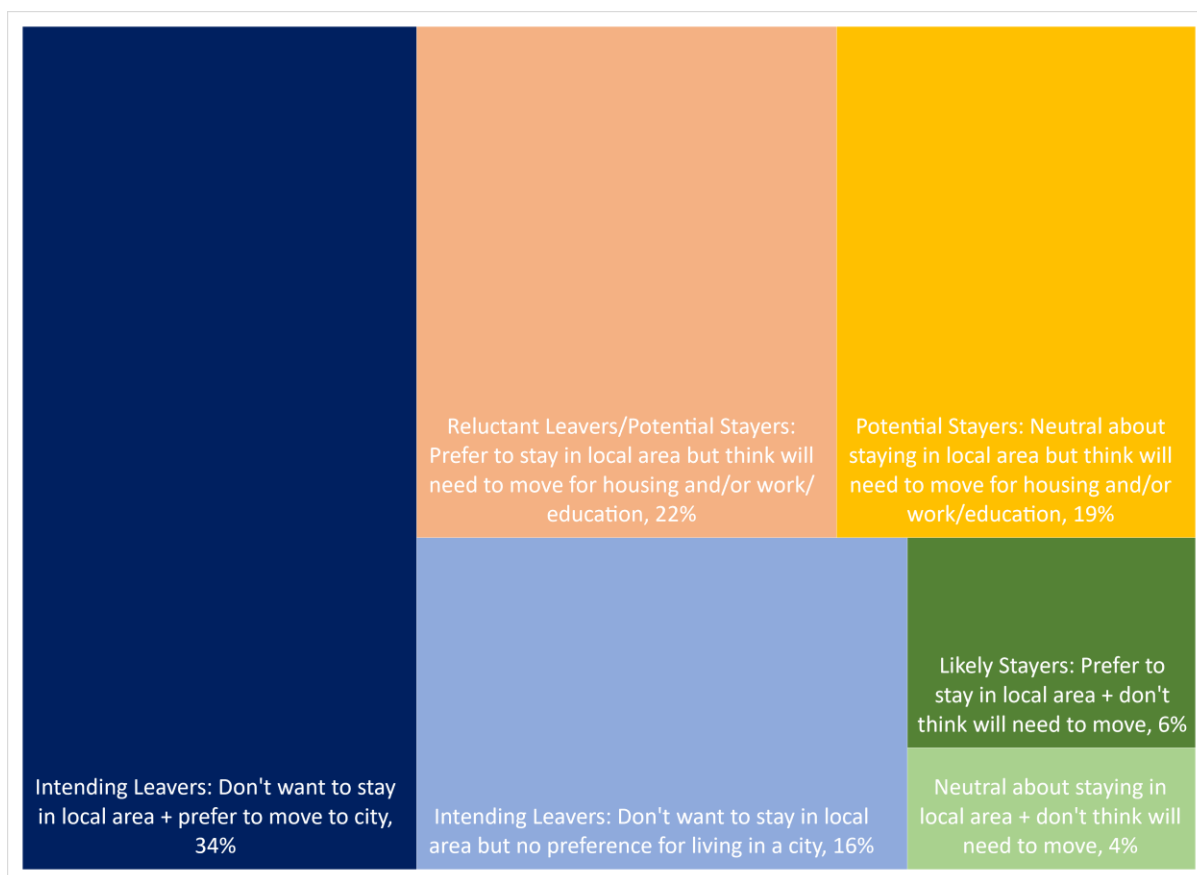


Figure 35: Model of potential mobility of young people in rural Wales (% of survey respondents, n = 1045)

The fairly large group of ‘reluctant leavers’, or at least of ‘potential stayers’, is also reflected in openness to moving back to the local area later in life, but this sentiment also extends to some expressing a preference for living in a city or large town, perhaps indicating that many young people want to experience urban life but not necessarily as a lifelong commitment. Over half of all survey respondents (57%) agreed that if they moved away from their local area they would like to move back later in life, with just 18% disagreeing (Figure 36). This includes 37% of those respondents who said that they would prefer to live in a city or large town, as well as 92% of the ‘potential stayers’ group. Current students at university are more likely to agree (51%) than those in school or FE college (50%), and respondents in north Wales and south west Wales are more likely to want to move back if they move away than those in mid Wales or Monmouthshire (Figure 37). Over two-thirds of first language Welsh speakers intend to move back later in life if they move away (68%), but less than a third of respondents with no Welsh agree (31%).

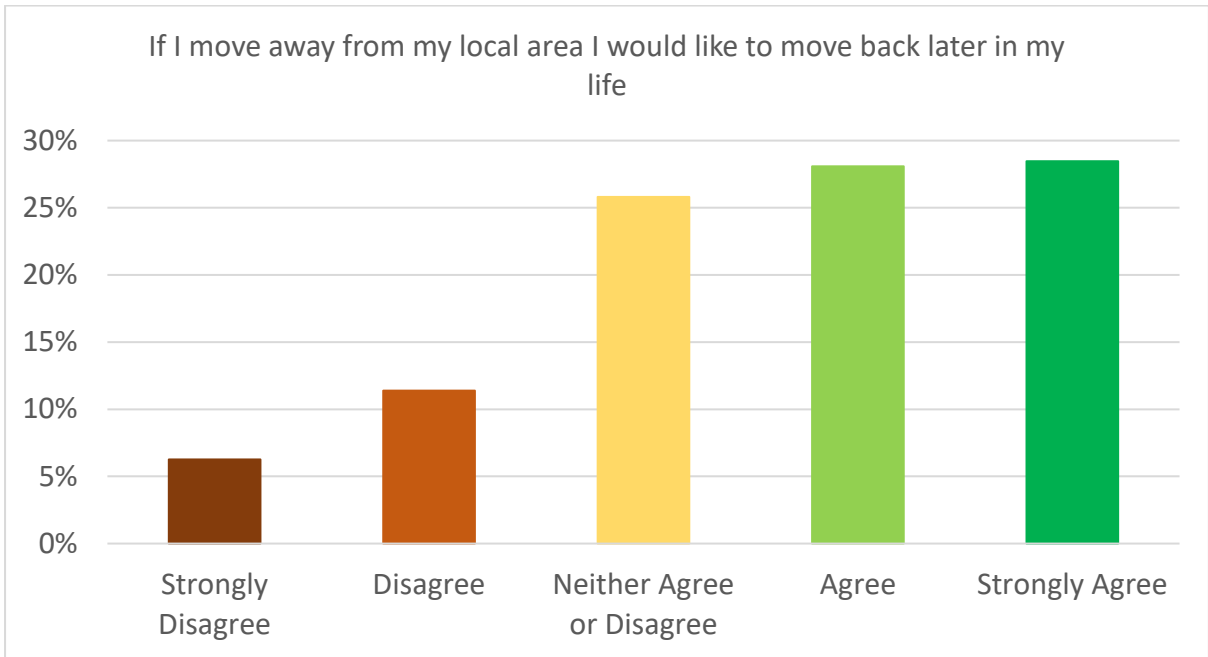


Figure 36: Survey responses to the statement 'If I move away from my local area I would like to move back later in my life' (n=1054)

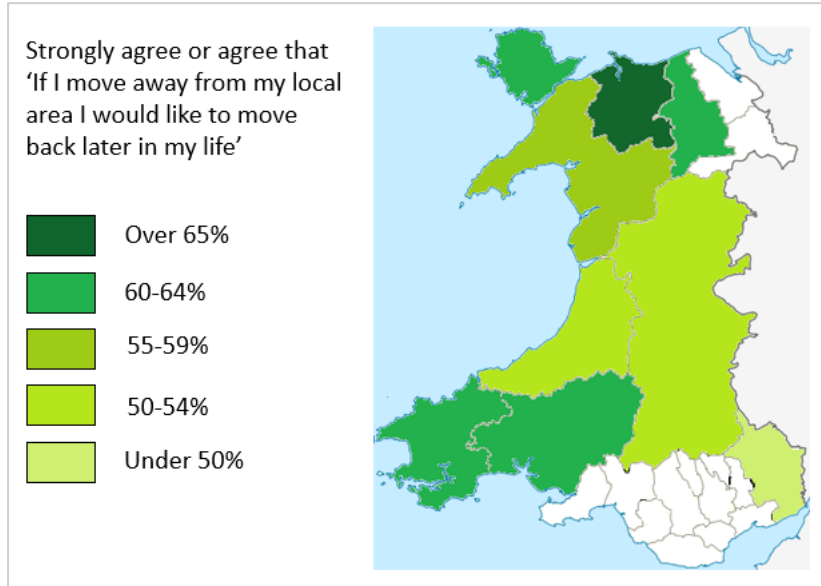


Figure 37: Survey respondents with preference to move back to local area if they move away, by county

Survey participants were also asked about what they think that they will actually do in the next five years, which aimed to focus on more concrete plans as opposed to the aspirations and concerns captured in the questions discussed above. Only 18% of respondents thought that they would continue to live in their local area through the next five years, with two-thirds thinking that they would move away (around a sixth of respondents replied that they didn't know). Most of those indicating that they would move away think that they will leave Wales,

with smaller numbers envisaging moving to cities or large towns in Wales, or to other places in rural Wales (Figure 38).

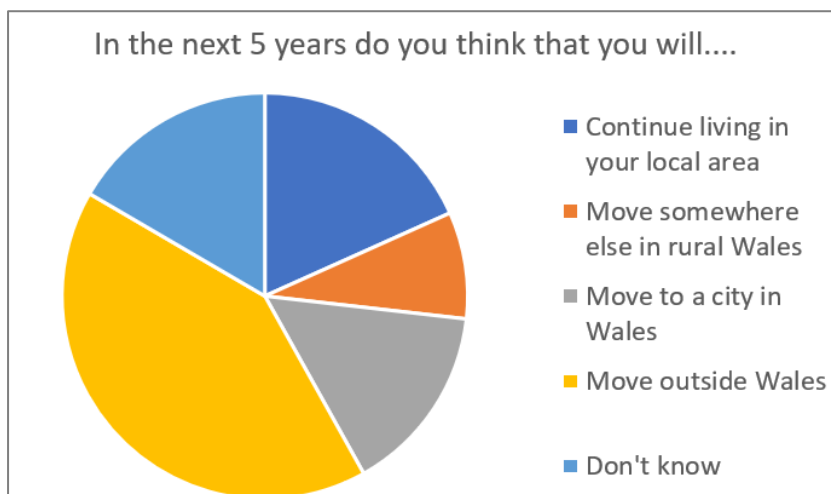


Figure 38: Survey responses on anticipated migration in the next five years (n = 1055)

In total, 42% of young people completing the survey thought that they would move outside Wales in the next five years, including nearly a third (32%) of first language Welsh speakers. This finding corresponds with a broader trend of net out-migration of young people from Wales, highlighted by the Welsh Government in October 2021.⁸ Moving away from Wales was the scenario most frequently selected by respondents in every local authority area, though numbers range from around a third of respondents in Denbighshire and Pembrokeshire, to nearly half in Monmouthshire and the Isle of Anglesey (Table 3). A significant number of young people in south Wales anticipate moving to a city or large town in Wales – including 30% of respondents in Pembrokeshire – reflecting proximity to Cardiff and Swansea, whereas this is an option considered by few respondents in north Wales, who are more likely to envisage moving to another part of rural Wales, for example to university in Bangor or Aberystwyth.

There is a predictable correlation between these expectations and the categorization of respondents into groups of ‘likely stayers’, ‘potential stayers’ and ‘intending leavers’. More than two-thirds of likely stayers think that they will still be living in their local area in five years time, with a further 15% anticipating moving elsewhere in rural Wales. Only 7% of this group think that they will move away from rural Wales in the next five years (Figure 39). Conversely, nearly two-thirds of ‘intending leavers’ think that they will move outside Wales, with a further 18% anticipating moving to a city or town in Wales. Fewer than one in twenty think that they will still be living in their local area in five years time. The ‘potential stayers’ group is more divided, with nearly a third thinking that they will continue living in their local area, and only 35% expecting to move outside rural Wales. As such, these figures suggest that concerns about needing to move for housing, education or work may be long-term, and that many

⁸ [Wales’ bid to stop brain-drain of young people](#), BBC News,

individuals with these concerns are nonetheless likely to find ways of staying in their local area in the immediate future.

In the next five years do you think that you will....					
	Continue living in your local area	Move outside Wales	Move to a city or large town in Wales	Move elsewhere in rural Wales	Don't know
Carmarthenshire	17%	41%	18%	8%	16%
Ceredigion	14%	45%	18%	7%	17%
Conwy	29%	37%	10%	10%	14%
Denbighshire	26%	32%	5%	18%	19%
Gwynedd	20%	38%	9%	11%	22%
Isle of Anglesey	18%	48%	8%	13%	12%
Monmouthshire	16%	49%	17%	4%	14%
Pembrokeshire	16%	34%	30%	2%	18%
Powys	15%	45%	17%	7%	16%
All respondents	18%	42%	18%	9%	17%

Table 3: Survey respondents anticipated migration in next 5 years, by local authority area.

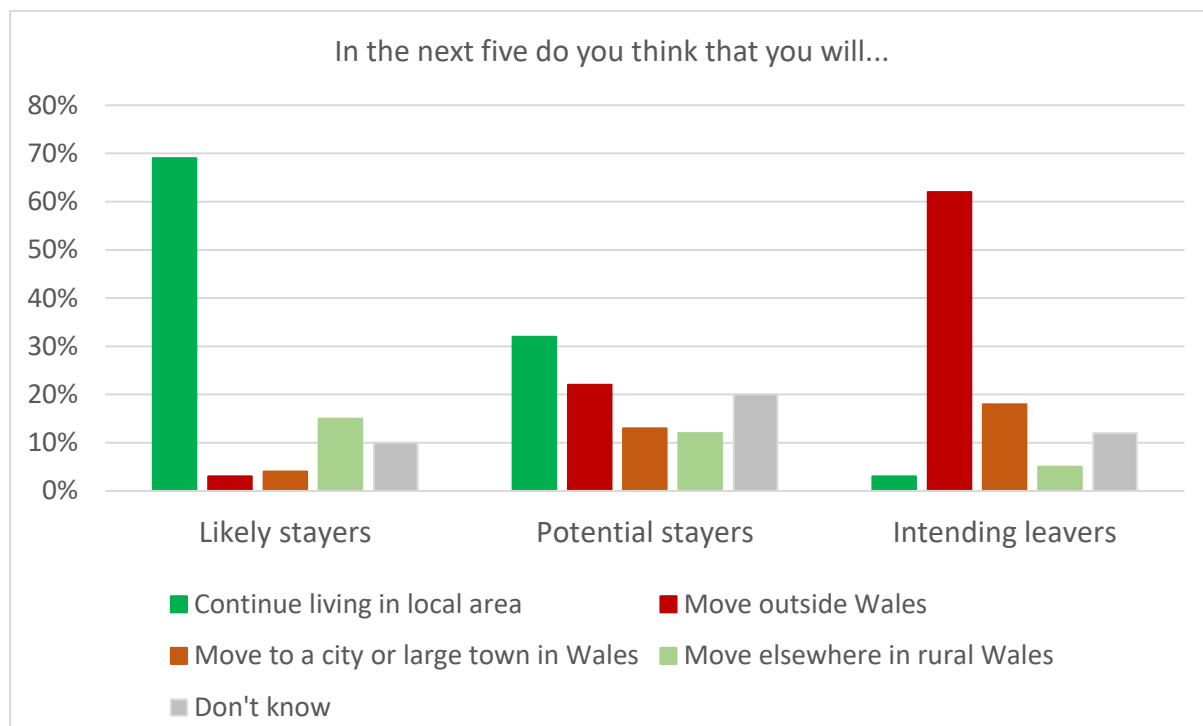


Figure 39: Anticipated migration in the next five years by group

Young people’s expectations around migration are inevitably closely tied to decisions about higher education. Over 70% of survey respondents aged 17 or 18, and over 60% of those aged

between 14 and 16, expect to move away from their local area in the next five years and in most cases this is in order to study at university. Overall, at least a third of respondents expecting to move outside Wales volunteered going to university as a reason, along with a similar proportion of respondents anticipating moving to a city in Wales, or within rural Wales. Of the survey respondents who are current full-time students in higher education, just over half are either at a university in Wales or are studying from home in rural Wales (52%), 45% are at a university in England, and around 2% are at universities in Scotland, Northern Ireland or the United States (Figure 40).

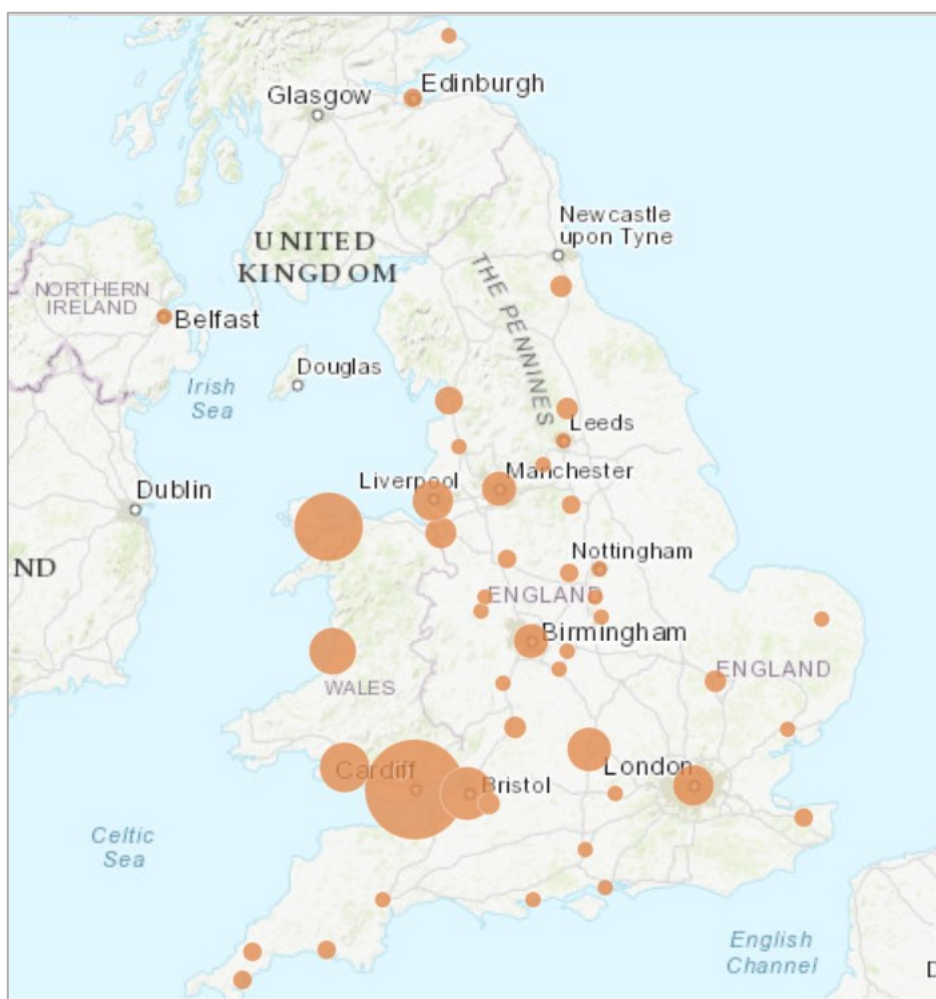


Figure 40: Term-time residence of survey participants in full-time Higher Education studying away from home. Smaller circles = 1 individual. Largest number, Cardiff = 28 respondents. Basemap: ESRI.

Whilst some respondents indicated that they planned to go to Aberystwyth or Bangor university in order to remain close to home, more frequently participants described a decision to opt for a city-based university in order to experience urban life. For at least one respondent in north Wales, that means leaving Wales as universities in north west England are more accessible than those in south Wales:

I love Wales but I've never been able to experience life in a big bright city. There is Cardiff but I think I would probably like to go to a city a bit closer to home as it would be my first time living elsewhere. Cardiff is much further for me than Chester or Bristol. (15 year old, Gwynedd)

More frequently, respondents explained choices to go to university in England in relation to the selection of courses, post-graduation opportunities, or a fairly widespread perception that universities in Wales were not of as high a standard, which some indicated was reinforced by some schools:

My school encourages us towards schools in England like Durham, Oxford and Cambridge not much is discussed about Welsh universities or opportunities that are at them. (15 year old, Monmouthshire)

Anticipated moves outside Wales were also commonly framed with reference to perceptions of limited economic and social opportunities in Wales:

There are more opportunities for my career in larger cities outside of Wales (16year old, Powys)

Wales feels very small as someone who wants to experience living in a bigger city at uni. I also feel I will have access to a wider range of career options elsewhere (17 year old Carmarthenshire)

Unfortunately, due to the rising housing prices and lack of good paying careers locally, I can see myself moving to a city such as Liverpool or Manchester in order to find work. I would rather stay locally, but it's uncertain whether it is economically viable. (16 year old, Isle of Anglesey)

I believe a city in England would provide me with more opportunities and connections to the wider world in my future. I would like to move to London and experience a busy and thrill seeking life rather than life on a seaside town (17 year old, Pembrokeshire)

A few non-Welsh speaking respondents specifically mentioned their lack of Welsh as limiting job opportunities in Wales. A small number cited perceptions of homophobia, racism, or in a couple of cases, anti-English sentiment, as push-factors for moving away from Wales. A few said that they planned to move to England in order to connect with larger LGBT+ communities and social opportunities:

Other places are more convenient for commuting+more public services+Better education+more diverse cultures+less homophobia+less racism (16 year old, Powys)

I want to move to Manchester because it's got good unis, cheap apts and is just a really nice place in general. Wales is just so homophobic and unaccepting (14 year old, Conwy)

Finding job/career opportunities and more social opportunities (esp. meeting other LGBTQ+ people) (20 year old, Carmarthenshire)

Apart from assessments of relative economic and social opportunities, for some young people a hope of moving away from rural Wales stems simply from a desire to experience differences and cultures, in some instances with a long-term expectation of returning:

After school, I would like to go to a university outside of Wales (still in the uk) in order to experience new environments, meet new people, and live in a more central area. (14 year old, Gwynedd)

I would like to explore places unknown to me and learn from new environments, though I am likely to return to live in North Wales some day. (16 year old, Gwynedd)

I enjoy living in rural Wales but I want to see more of the world before I come home. (16 year old, Pembrokeshire)

Want to experience different cultures (15 year old, Pembrokeshire)

I'd like to travel and experience life outside my local area. (16 year old, Ceredigion)

Sixteen respondents specifically stated that they planned or would like to move outside the UK in the next five years.

A number of respondents articulated an expectation that going to university in England would mean staying there after graduation. This assumption is to some extent supported by the responses of current students and recent graduates several of whom stated that they planned to stay in the city or region in which they studied, in part for employment opportunities, but also having developed an affinity with the city, or because their friends were now predominantly in England. Only 15% of students currently in higher education think that they will continue or return to live in their home area over the next five years and half think that they will move outside Wales (including students remaining in their university city after graduation). Individuals explained their plans in terms of limited opportunities in their home area and perceived greater opportunities outside Wales:

There are few jobs for young people in my local area and virtually no opportunities to start a job that could turn into a career. I feel forgotten about, when I visited family in a big city I was shocked at how much opportunity and choice there was for young people, jobs /education / nurturing hobbies + community, and accessible transport to get there too. I will have to start my career in England, probably London, Manchester or Bristol as they are the main cities for jobs in the subject I am studying at Uni and for what I want to do for the rest of my life. Even though I am in love with the Welsh language and my heritage I feel pushed out of Wales if I want to do well for myself in life. (20 year old, Powys)

I love where I'm from, which is just outside Aberystwyth. However, there are nowhere near enough employment opportunities. I'd like to move outside of the UK in the future. (23 year old, Ceredigion)

My social life at home is incredibly limited and the employment opportunities for graduates are very limited. (21 year old, Gwynedd)

I find there's a lot more job opportunities in England and I am already studying and living in England part time so it is what I am used to. I also find rural areas in England also have more services and opportunities than in a rural Wales area (19 year old, Powys)

Having been to university outside of Wales, most of my friends are living in England. Because of the limited social opportunities at home especially and in Wales generally, I will be much happier elsewhere for the time being. I would eventually like to move back to Wales, but probably to an urban centre first to be able to get better work and access more diverse social circles (21 year old, Ceredigion)

Many specifically anticipated needing to move outside Wales in order to find appropriate graduate-level employment in the fields in which they have studied or intended careers, with fields such as engineering, computing and creative industries frequently mentioned:

I am studying medicine in Liverpool. I think the career prospects and postgraduate training options are better in England. (22 year old, Denbighshire)

I have to move to London for job opportunities in the acting industry. It is the last thing I want to do. I would live in Wales for my whole life if I could. Aberystwyth has an incredible theatre community that needs funding and supporting. (22 year old, Powys)

There are very limited job opportunities for me in Wales, I'm studying Games Art and I want to work in a games studio (19 year old, Isle of Anglesey)

When I finish my degree I more than likely won't be able to find employment in Wales due to the nature of my job (21 year old, Pembrokeshire)

I will soon be a qualified primary school teacher and, due to not speaking enough basic Welsh even for an English primary school, I will be unable to work in Wales. (23 year old, Powys)

I'd like to work in health and genetics research so will have to go where there are jobs and funding – when I've previously looked there have been limited opportunities in Wales (22 year old, Isle of Anglesey)

I have a Biology degree and want to put it to use and really struggle to find technician jobs in my area (21 year old, Powys)

Having recently graduated uni with a good degree grade I'm looking to start a career ... Having been searching for graduate jobs I have come to realise if I want to find a decent career in near enough any field I need to move out of north Wales, which is really sad (22 year old, North Wales)

There are no jobs in this area for the field I graduated in. I'm currently staying with my parents and working a temporary job to make ends meet while I look for something more permanent. Sadly, this is likely to lie outside of Wales. (23 year old, Pembrokeshire)

Respondents who are currently in work are the group mostly likely to remain in their local area, with 30% thinking that they will continue to live in their local area over the next five years, but half nonetheless think that they will move in the next five years, including 29% who anticipate moving outside Wales. Comments from individual respondents indicated that these respondents tend either to be in jobs that are not in their preferred field, or feel that they need to move in order to progress their careers within their profession or industry:

This is mostly to do with my career choice (concept art for movies, TV, video games etc) not having much/any presence in Wales apart from some small industry connections in places like Cardiff. Though I must add that if I was able to build this career on a self-employment basis, I'd reconsider my answer for this question. (25 year old, Powys)

For the field of work I'm in, I find that there are more opportunities outside of Wales. (24 year old, Self-employed, Monmouthshire)

Lack of career prospects here; will need to leave to progress in my career (25 year old, Gwynedd)

There are a lot more opportunities for my type of work in England (23 year old, Pembrokeshire)

Rural Wales does provide the opportunities needed to go further in my career. (25 year old, Powys)

The opportunities in Wales are limited, the renewable sector in which I work has many more options if I move out of Wales. I have enjoyed my job in Pembrokeshire but there isn't much to do to meet young people (23 year old, Pembrokeshire)

There's no job opportunities in Wales for the specialist field I'm trained in (24 year old, Isle of Anglesey)

Move away to progress my career and find a better paying job in the maritime industry (23 year old, Gwynedd)

Young people between 22 and 25 are nonetheless the age group most likely to stay in their local area and for many this reflects a conscious decision to remain or return and a process of 'settling down', having found an appropriate job, invested in housing, and/or committed to a partner:

My partner wishes to stay where we are due to his job. (21 year old, Ceredigion)

Bought a house with affordable housing scheme so won't be moving soon. Prefer to live rurally. (24 year old, Carmarthenshire)

I work in translation so there are many job opportunities for me locally. I also prefer living in a rural Welsh-speaking area. (23 year old, Gwynedd)

I have recently bought a house with my boyfriend on Anglesey. I moved from the Wrexham area to live here and am currently learning Welsh. I enjoy living here but the job options are reduced massively. I am currently working from home so am seeking other options like this. (23 year old, Isle of Anglesey)

Have plans to stay in Rural Wales and improve the area by creating new businesses and jobs (21 year old, Powys)

Now that I have a stable job I will not be moving away. (25 year old, Conwy)

In a reverse of the trajectory anticipated by many young people, these older 'stayers' include individuals who came to university in towns such as Aberystwyth or Bangor from outside rural Wales and have stayed after graduation:

I initially went to university having lived all my life in London. I stayed. (24 year old, Ceredigion)

I studied countryside conservation at Aberystwyth University. I have since found work in this sector in Radnorshire and Montgomeryshire. I plan on living and working in this part of Wales for some time if the jobs continue. (24 year old, Ceredigion)

For younger respondents planning to stay in their local area, remaining is often linked to not going to university and finding work locally, including in some cases a commitment to entering farming:

I'm going into my first year of college and would like to stay in the area while and after I qualify to be an electrician. I know the area well and have many contacts that could be potential clients. (16 year old, Carmarthenshire)

Coz I live in a farming family and I'm likely the next generation to own the farm. (16 year old Gwynedd)

Because it's where I grew up in and if there is a job nearby I will take the opportunity to do whatever I can to make up I of money savings and buy myself a house nearby to my family. (15 year old, Gwynedd)

I have a job and don't want to go to university yet as not sure what I want to do with my life (17 year old, Pembrokeshire)

I'm hoping to continue living and working on the farm. (21 year old, Ceredigion)

I've started an apprenticeship for three years at a local HGV recovery garage and plan to stay their and become fully trained and gain my level 3 qualification (17 year old, Powys)

Similarly, some respondents had made a conscious decision to study at a local college or from home online in order to remain in their home are:

I will be attending college not too far away and will not be leaving home (17 year old, Isle of Anglesey)

I'm living with my parents while doing my degree so I don't need to move. I worry that if I want to go further e.g. do a masters or PhD I'll have to move away because there isn't anywhere I could do it near enough for me to live at home, but I don't plan on doing that within the next 5 years. I don't want to live anywhere else other than here, towns and cities stress me out and I'd miss the countryside too much. (19 year old, Pembrokeshire)

Because, as of right now, I will not be attending university and therefore will continue to live at home and work part time as I do qualifications online (17 year old, Powys)

Access to employment opportunities and career progression can be a reason for moving within rural Wales, including moving from more remote rural areas to closer to larger towns such as Aberystwyth or Bangor:

I'd like to live in a rural area that isn't far from a town so that I'd have better work and social opportunities. (21 year old, Conwy)

I am eager to live within a rural Welsh community, however to find suitable and well paid job in the rural and agricultural industry would mean having to move away from my local area (21 year old, Conwy)

I think it is likely I will have to move from the countryside where I live to a larger town, ie Aberystwyth, to ensure myself and my partner can both find work within a reasonable commuting distance. (22 year old, Powys)

A few respondents however expressed an intention to move to a *more remote* rural location, including for example, an individual living in a village in Neath Port Talbot district who stated that they “want to live somewhere more rural so I can start up my own community farm as well as be a teacher”.

Housing is also cited as a reason for moving within rural Wales, as well as away from the region. Overall, housing was less frequently mentioned by respondents as an explanation for their likely mobility over the next five years than employment or education. The availability of affordable housing was mentioned by a significant number of respondents as a factor in why they expected to move from their local area but was rarely given as justification for moving *to* a particular area. With the exception of one respondent who stated that they would move to Chester as property was cheaper than in their rural community in north Wales, the few examples tended to involve moves within rural Wales, including moving from popular tourist areas and more accessible rural districts with higher property prices to more remote rural localities with lower house prices:

I would like to move to a more rural location in North Wales. My local area is a popular tourist destination and as a result is busy and houses are unaffordable (22 year old, Denbighshire)

Properties in my area are very expensive and marginalises low income families like mine. There also isn't as many job opportunities in my field of work (19 year old, Monmouthshire)

In contrast with the widespread concern of young people that they will need to leave their local area to find suitable, affordable housing, a small number of respondents gave housing as a reason why they expect to remain in their local area over the next five years, including being unable to afford to move out of the family home, anticipation of inheriting property, and in one case the statement that, “I find that the only housing I will be able to afford is in rural Wales” (19 year old, Powys).

Potential Policy Interventions

The sizeable group of ‘potential stayers’ identified by the survey – young people who would prefer to remain in rural Wales, or at least are neutral about staying, but consider that they will need to move away for employment, education or housing – indicates that there is scope for policy interventions to make a difference in reducing youth out-migration from the region. The survey asked participants to select potential changes that would make it more likely that they would stay living in their local area, or return after studying, from a list provided, with the ability to select multiple options. As Figure 41 shows, there is no one ‘silver bullet’ that in itself would drastically cut out-migration, but great job opportunities relevant to intended careers, better transport connections to larger towns and cities, more entertainment and leisure facilities, better paid jobs, and more affordable housing would all make a difference for more than half of the respondents. Only 3% of respondents said that none of the indicated changes would make a difference.

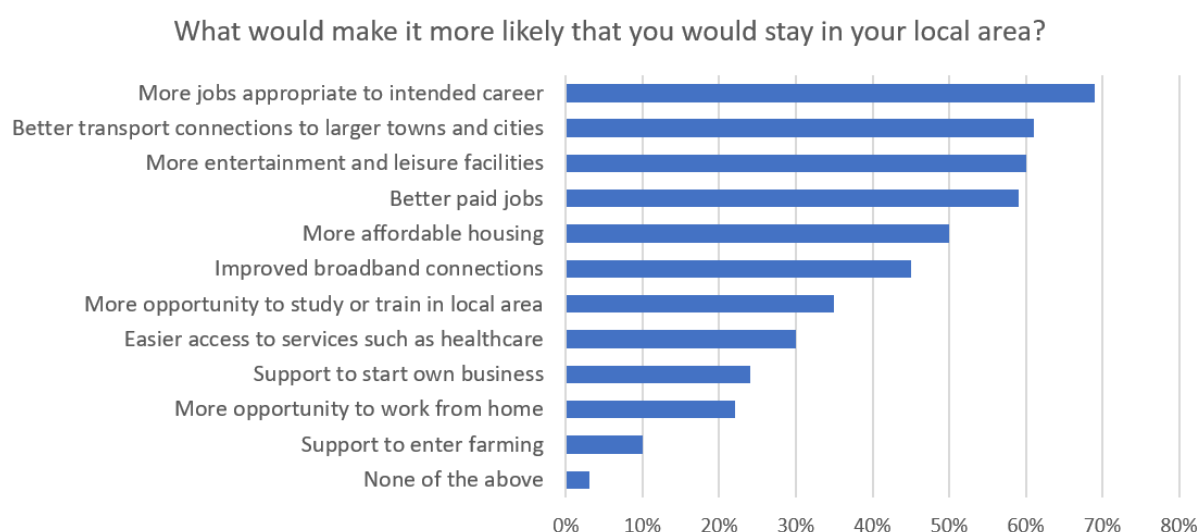


Figure 40: Survey responses on potential changes that would make it more likely that the respondent would stay in (or return to) their local area (n=1056)

The relative importance of the different measures is fairly consistent across the various sub-groups in the sample, but there are some exceptions where individual changes are either likely to have a significantly wider impact with a particular sub-group or are viewed as significantly less important by a sub-group, as shown in Table 4. For example, more appropriate job opportunities could help 69% of respondents overall stay in their local area, but this rises to 81% in Pembrokeshire and 82% in Powys; better transport connections would make a difference for 74% of respondents in Powys and 71% in Carmarthenshire, compared with 61% overall; better paid jobs are especially important to respondents aged over 22, those in other forms of training, and those living in Anglesey or Pembrokeshire; and more affordable housing would make a difference for 50% of respondents overall, but 61% in Pembrokeshire. Of the less selected options, better access to healthcare is important for 44% of respondents in Powys and 43% in Pembrokeshire, compared with 30% overall; and more opportunity to study or train in the local area would make a difference for 46% of respondents in Denbighshire and 43% in Pembrokeshire, compared with 35% overall.

	Average	More important	Less important
Appropriate job opportunities	69%	Aged 19-21 (78%) Denbighshire (75%) Pembrokeshire (81%) Students in HE (82%)	Monmouthshire (56%)
Better transport connections	61%	Carmarthenshire (71%) Powys (74%)	Aged 14-16 (53%) Men (53%) Conwy (53%) Gwynedd (45%) In other training (43%) First Language Welsh (44%)
More entertainment and leisure facilities	60%	Pembrokeshire (72%) Powys (70%) Live in a town (68%) Do not speak Welsh (68%) Know some Welsh (69%)	Gwynedd (41%) Live in open countryside (50%) NEET (49%) First Language Welsh (40%)
Better paid jobs	59%	Aged 22-25 (67%) Isle of Anglesey (69%) Pembrokeshire (71%) In other training (71%)	Monmouthshire (37%)
More affordable housing	50%	Pembrokeshire (61%)	Do not speak Welsh (42%)
Improved broadband connections	45%	Carmarthenshire (55%) Live in open countryside (52%)	Ceredigion (38%) Gwynedd (29%) In other training (29%) NEET (35%) First Language Welsh (36%)
More opportunity to study or train in local area	35%	Denbighshire (46%) Pembrokeshire (43%)	Monmouthshire (23%) First Language Welsh (26%)
Easier access to services such as healthcare	30%	Aged 22-25 (39%) Conwy (42%) Pembrokeshire (43%) Powys (44%) NEET (40%)	Aged 14-16 (21%) Ceredigion (20%) Denbighshire (18%) Monmouthshire (16%) Live in open countryside (21%) Student in school (24%) First Language Welsh (18%)
Support to start own business	24%	Carmarthenshire (34%) Denbighshire (30%) In employment (31%)	Monmouthshire (14%) In other training (14%)
More opportunity to work from home	22%	Aged 22-25 (33%) Carmarthenshire (29%) Student in HE (28%) In other training (29%) Do not speak Welsh (28%)	Aged 14-16 (16%) Conwy (15%)
Support to enter farming	10%	Aged 22-25 (15%) Live in open countryside (14%) In other training (14%)	Ceredigion (5%) Denbighshire (6%)
None of the above	3%	Carmarthenshire (8%) In other training (14%)	Denbighshire (0%)

Table 4: Changes that are notably more or less important than average for specific sub-groups of survey respondents

Notably, the availability of affordable housing is more important for respondents in the ‘potential stayers’ category than for the sample as a whole, with 66% saying that more affordable housing would make it more likely that they would stay in their local area, second only to more appropriate job opportunities (73%). Potential stayers also place more emphasis on better paid jobs (selected by 62%) and on support to start their own business (32%) (Figure 42).

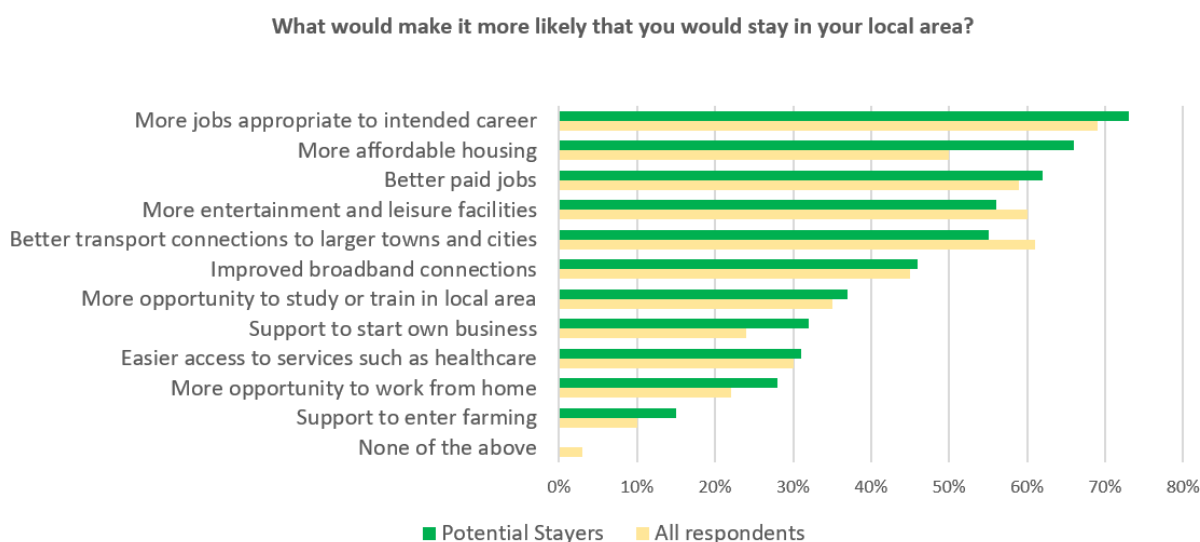


Figure 41: ‘Potential stayers’ selection of changes that would make it more likely that the respondent would stay in (or return to) their local area (n=424)

The survey results are reinforced by feedback from the group discussion sessions with young people in Ceredigion, Pembrokeshire and Powys in answer to the question of ‘what things could help you stay or return to live in the local area’, as the narrative summary provided by one youth worker in Box 1 illustrates. Affordable housing was mentioned by participants in five of the seven groups and improved public transport and better job opportunities (including ‘international jobs’) were raised in more than one group. Perhaps reflecting the younger age profile of the participants in these sessions, a strong emphasis was also put on entertainment and leisure opportunities, notably cinemas but also specific suggestions such as a youth hub or a racing track – as one group put it, “more fun”. Support to start a business was mentioned in the discussion in Brecon.

The WLGA Rural Forum’s Rural Vision for Wales includes a number of proposed measures that correspond with the priorities identified by survey participants and the group discussions. These include creating STEM Centres of Excellence in rural counties to develop the skills of young people and provide more opportunities for study and train; support to expand apprenticeship schemes; initiatives to develop entrepreneurial skills and to promote self-employment as an aspirational career path; more flexible housing policies to reflect demands from communities and the needs of young people; exploring opportunities for cooperative housing schemes; and demand-led public transport; as well as the broader strengthening and diversification of the economy, with an emphasis on emerging industries.⁹

⁹ [A Rural Vision for Wales](#), WLGA Rural Forum, 2021.

What are some of the things that could help you stay or return to live in the local area?

A priority for them would be more buses that were more regular therefore, improved public transport was important to them and would support them to stay local. Getting better transport links would help them to move around the county and access more services.

It was also discussed that housing needs to be affordable to young people in order for them to get onto the property ladder. An example was provided where a house in the local village was recently for sale but it was too expensive for local young people to afford.

Improvement in digital connectivity was vitally important to one of the young people as they wanted to pursue a career in IT. They felt that poor connectivity could hinder their prospects of returning to work in their local area, as their chosen career would be dependent on good digital connectivity.

They felt that access to cinemas and theatres was also quite poor, although by travelling to Aberystwyth or Carmarthen they could potentially gain access to such services. They felt it would be beneficial if there were more opportunities for them to socialise and enjoy activities such as going to the cinema with their peers locally.

It was also discussed that accessing Health Care such as the GP or Dentist is also quite challenging with 'not enough around', as they would need to travel to gain access. There was a belief that this was challenging not only for them but for their families and members of their community.

Box 1: Summary report by youth worker on discussion session with young people in Ceredigion

The availability of more jobs that are appropriate to their intended career was the item most frequently selected by survey participants as a factor that could help them to remain in their local area but is one of the most difficult to action because every individual has a different idea of what it means in practice reflecting their diverse career aspirations. The Rural Vision highlights new and expanding sectors such as biotechnology, green technology, food science, digital agriculture, and advanced manufacturing as priorities for investment and growth in rural Wales, aimed at creating higher skilled, higher paid and graduate-level jobs. Yet, the survey responses identify a risk that there could be a mismatch between these strategic priorities for regional development and the career interests and aspirations of young people in rural Wales, producing a gap that would be likely to be filled by the in-migration of skilled workers as occurred in earlier periods of regional development in Wales. When asked about their interest in selection of industries and sectors, only 13% of respondents expressed an interest in working in green technology or renewable energy, 12% in information technology or computing, 8% in biotechnology, 6% in hi-tech manufacturing, 4% in food processing or marketing, and 3% in digital agriculture (although some of these figures are skewed by the under-representation of men in the sample – 22% of male respondents expressed an interest in IT and computing, 18% in green technology and renewable energy, and 12% in hi-tech manufacturing) (Figure 42). As such, if these sectors are to be the focus for economic development strategies in rural Wales, investment needs to be accompanied by efforts to promote careers in these fields to local young people and opportunities for relevant training. The responses of potential stayers are very close to those of the sample of a whole.

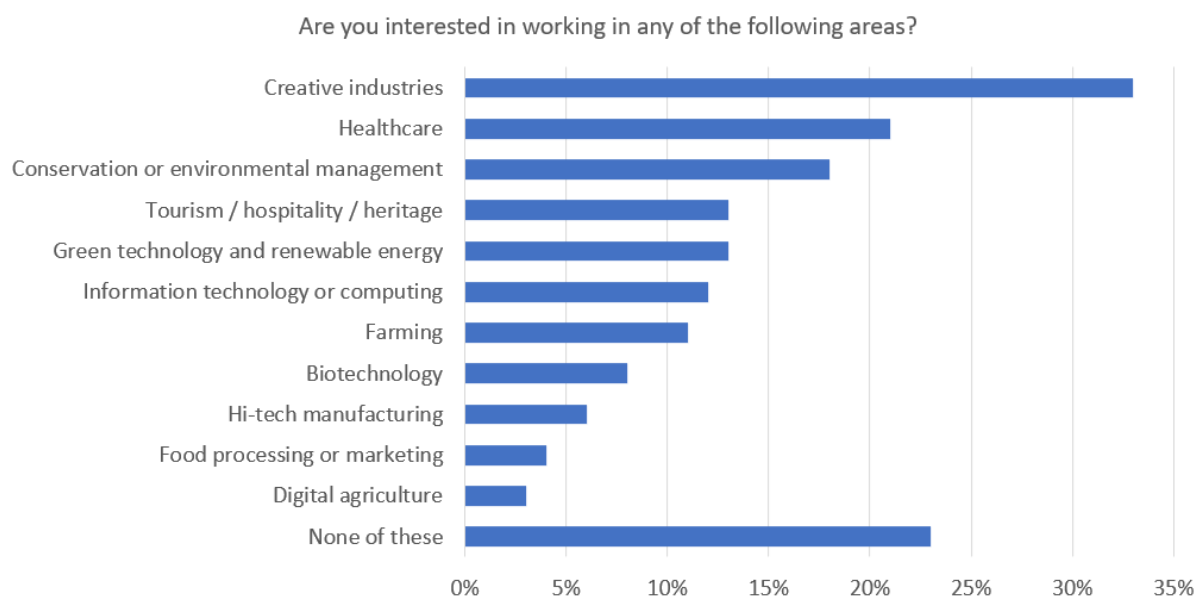


Figure 42: Interest of survey respondents in working in selected sectors (n = 1055)

The most popular sector is the creative industries, with a third of respondents expressing an interest, especially older respondents aged over 21. ‘Creative industries’ is a broad category, with examples of ‘ideal jobs’ cited by respondents including, for example, TV production, music, journalism, video game design, illustrator, artist, film, sound design, animation, graphic design, photography, publishing, writing, fashion, and craftwork. Research in other parts of the world has shown that creative industries can provide means of enabling young people to remain in rural areas, potentially in combination with seasonal or part-time work in tourism or self-employment in agricultural or food ventures. This potential is recognised in the Rural Vision with proposals to establish ‘creative hubs’ in rural small towns, modelled on Yr Egin in Carmarthen, but each with a focus on a different sector.¹⁰ The success of Yr Egin may possibly explain why interest in the creative industries is highest in Carmarthenshire, where 45% of survey participants expressed an interest.

The survey responses to this question contain three further points of note. First, just over a tenth of respondents (and 15% of male respondents) expressed an interest in farming as a career. This is higher than the current level of agricultural employment in the workforce of rural Wales (7.4%) and as such suggests that the problem of farm succession is not one of declining interest in farming by young people, but of matching interested young people with opportunities and providing support for new entrants to agriculture. Second, over a fifth of respondents indicated an interest in working in healthcare, including 28% of female respondents. This level of interest is promising with respect to challenges of recruitment to health professions in rural Wales, especially as examples of ‘ideal jobs’ given by respondents include nurse, GP, midwife and paramedic along other specialist roles, but highlights the need for appropriate training routes. The development of a Nursing School at Aberystwyth

¹⁰ [A Rural Vision for Wales: The Evidence Report](#), Aberystwyth University and WLGA, 2021

University and a North Wales Medical School at Bangor University, flagged in the Rural Vision Evidence Report, could help to address this need. Third, work in conservation and environmental management is the third most popular sector, with 18% of survey respondents expressing an interest, and is a field in which employment opportunities exist in rural Wales, but is a sector often associated with relatively low pay.

Nearly a quarter of survey respondents stated that they were not interested in any of the listed sectors, with other careers cited multiple times as 'ideal jobs' including law, finance, teaching, policy, real estate, civil service, forensic science, and marine biology, as well as trades including carpenter, mechanic, electrician and welder.

The development of the Rural Vision coincided with the first months of the COVID-19 pandemic and participants in workshops and scenario-testing identified both potential negative and positive impacts for rural Wales. Among the potential positive impacts was an anticipation that the normalisation of remote working and home working could remove some of the need for young people to move away from rural Wales for employment, allowing more to remain in or return to their home areas. The survey however presents at best equivocal evidence on this prospect. Just over a fifth of survey respondents indicated that more opportunity to work from home could make it more likely that they would stay in or return to their home area, including a third of respondents aged 22 or over, 28% of those in higher education, 28% of non-Welsh speakers, and 29% of respondents living in Carmarthenshire. However, when asked directly about their preferred working environment, only 9% of respondents said that they would ideally prefer to work from home for a large company or organization (Figure 43). The most popular option is still to work for a large company or organization in an office or other workplace, selected by a quarter of respondents, followed by being self-employed, and working for a small business. Interestingly, the results show a clear gender reference, with nearly a third of young men expressing preference to be self-employed or to run their own business, compared with just 17% of young women. The level of interest in self-employment demonstrates the potential significance of schemes to encourage and support entrepreneurship among young people, as identified in the Rural Vision, such as the Llwyddo'n Lleol 2050 initiative in north-west Wales.¹¹

¹¹ [A Rural Vision for Wales: The Evidence Report](#), Aberystwyth University and WLGA, 2021

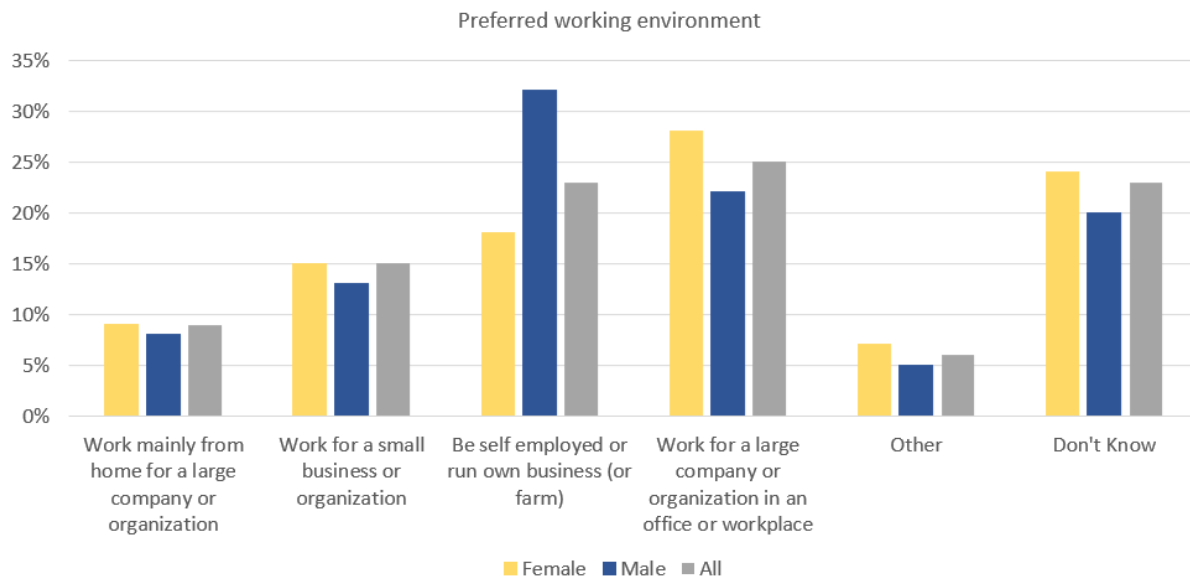


Figure 43: Survey responses to the statement, 'In your main career would you prefer to...'
(n=1056)

Conclusions

The survey results reinforce the findings of earlier research that reveal a tension between the generally positive attitudes of young people towards living in rural Wales, and a strong sense of place attachment for many, and widespread dissatisfaction with specific aspects of service provision, employment opportunities and access to housing. Like previous studies, it finds that the majority of young people consider that they will need to move away from their local area in order to find appropriate jobs and/or suitable, affordable housing, in many cases against a preference to continue living in their home area.

The large sample size of the survey, with over a thousand respondents, enables us to move beyond previous studies by drilling down into the detail, disaggregating larger trends and producing a more nuanced picture. Gender, age, education or employment status, Welsh language ability, and where young people live all can make a difference to their perceptions about life in rural Wales and their future intentions.

There are geographical differences, for example, in views on public services and social and cultural opportunities, concerns about housing and employment, and the hopes of young people to move back to the area later in life if they move away. Concerns about affordable housing, for example, are significantly greater among young people in Pembrokeshire than in Powys; whilst the perception that they will need to move away for employment, education or training is more prevalent among young people in the southern counties of Pembrokeshire, Carmarthenshire and Monmouthshire than in mid or north Wales. Young people in south Wales and in north Wales also look in different directions when it comes to moving away from rural Wales. Young people in north Wales tend to look towards cities in north west England, such that moving out of their rural area in effect means leaving Wales. Young people in south Wales have a greater likelihood of moving to Cardiff or Swansea, but there are also strong draws to Bristol, London and parts of the English Midlands.

For a significant group of young people, living in rural Wales is strongly associated with Welsh identity and language, reflecting concerns in broader debates that youth out-migration is detrimental to the sustainability of Welsh as an everyday language in communities. First language Welsh speakers are generally more positive than young people as a whole about life in their rural area, especially about public services and social and cultural opportunities, and are more likely to want to continue living in their local area or to return if they move away. Nonetheless, the majority of first language Welsh speakers think that they will need to move from their local area for employment, education, or housing, with a third anticipating that they will move outside Wales in the next five years.

There are notable differences in the views and expectations of first language Welsh speakers and fluent speakers of Welsh as a second language, especially in relation to social and cultural opportunities and employment opportunities, suggesting that cultural identity and being part of a Welsh-speaking community through family ties are more important in shaping outlooks than language competence per se. The 14% of young people in the survey sample who do not

speaking Welsh at all also form a distinct group, tending to be more dissatisfied with social, cultural and employment opportunities in rural Wales than other young people and much less inclined to return to their local area if they move away.

The views of young people also vary by age group, evolving as young people progress through education and into employment. The youngest respondents, aged between 14 and 18, can express general discontent with aspects of rural life and a desire for wider experiences, but concerns around housing and employment tend to be less immediate and less sharply articulated. There is more of an emphasis on social dimensions, such as access to entertainment and shops, public transport, and the difficulty of meeting up with friends, as captured in the discussion sessions with groups of young people in Ceredigion, Pembrokeshire, and Powys.

For many young people, decisions about staying or leaving their local area are closely tied with decisions about higher education. Although Aberystwyth and Bangor are among the most popular universities selected by young people in rural Wales, most see going to university as an opportunity to get a different, and often urban, experience with many opting for universities outside Wales. This decision can translate into a long-term move, as young people choosing to stay in England, or in cities in south Wales, after graduation, due to job opportunities or because of the social connections that they have made. Current students in HE are among the groups most critical of employment opportunities in their home area, with even those who would prefer to return home after graduation believing that they will need to move away to find appropriate graduate-level jobs in their field.

Decisions about HE also mark a bifurcation between those young people who go to university and those who go into employment or some other form of training. A significant number of respondents who plan to continue living in their local area explained that they do so because they have found a job in the area that they like or are in vocational training that could enable them to stay. Yet, the affordability of housing is a key concern for this group, possibly because they anticipate lower earnings, and employment opportunities in the local area are still a worry for many, especially those in vocational training. Several articulated expectations that they will need to move within rural Wales to find suitable employment or housing.

The oldest group of survey respondents, aged between 22 and 25 and including graduates who have returned to their home area after studying, have views that are shaped by their conscious decisions to stay in or return to rural localities. As such, they tend to be among the most positive about living in rural Wales, and among the most committed to staying, but are also the group most dissatisfied with public services – perhaps due to comparisons made with urban areas where they have lived, or because they have started thinking about raising families. This age group is also the most concerned about affording to buy a house in the area, and although the majority are in employment many still consider that they will need to move away in order to advance their preferred career.

The analysis of the survey data allows for young people in rural Wales to be categorised into three groups according to their hopes, concerns, and expectations around migration. The first group are **'likely stayers'**, who either would prefer to continue living in their local area all their life or neutral about doing so and also do not think that they will need to move away for employment, education or housing. These comprise about one in ten young people completing the survey. Compared with survey respondents as a whole, this group is disproportionately male and about twice as likely to be currently working rather than in education.

The second group as **'intending leavers'**, who want leave their local area, at least for a period, with two thirds preferring to live in a large town or city. About half of young people completing the survey fall into this group. Students in school, sixth form or college are over-represented in this group, and first language Welsh speakers are under-represented. Around a third of this group want to leave their local area permanently, but the majority are open to moving back later in life, including around a third who express a desire to do so.

The third group are **'potential stayers'**, who are arguably the key group for reducing youth out-migration from rural Wales. These are young people who would prefer to continue living in their local area, or are neutral about remaining, but believe that they will need to move away for employment, education and/or housing. More than two-fifths of survey respondents fall into this category, with first language Welsh speakers and respondents currently in work over-represented. Some of this group anticipate being able to stay in their local area in the short-term, with nearly a third envisaging that they will not move in the next five years, but most consider that they will leave in this period. Almost all hope to return to their local area later in life if they move away.

The sizeable group of potential stayers implies that are a substantial number of young people in rural Wales that would be responsive to policy interventions to try to stem out-migration. Initiatives aimed at increasing the availability of affordable housing, improve pay levels, and expand the range of available jobs in rural Wales are most likely to have an impact in enabling this group of potential stayers to remain, with efforts to enhance entertainment and leisure facilities and to improve transport connections with towns and cities likely to make a difference for young people more broadly. However, the survey also points to challenges in aligning priorities for economic development in areas such as green technology, biotechnology, and hi-tech manufacturing with the career aspirations of young people in rural Wales, such that strategic investment in these areas needs to be accompanied by promotion of these sectors in schools and colleges to raise interest and provision of appropriate training locally. Strategies to support creative industries and to strengthen training opportunities in healthcare could also help to retain young people in rural Wales. In spite of some expectations, the post-pandemic expansion of remote and home working is not in itself likely to lead to more young people choosing to remain in rural areas, however the survey reveals significant interest in self-employment and entrepreneurship, especially among young men, which could create opportunities if nurtured through strategic initiatives.

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