

wavehill™

social and economic research
ymchwil cymdeithasol ac economaidd

Interim report: Developing a strategy for the future

Initial conclusions and recommendations



Wavehill: social and economic research

- Wales office: 21 Alban Square, Aberaeron, Ceredigion, SA46 0DB (registered office)
- West of England office: 12 Orchard Street, Bristol, BS1 5EH
- North of England office: Milburn House, Dean Street, Newcastle, NE1 1LE
- London office: 52 Cecile Park, Crouch End, London, N8 9AS

Contact details:

Phone: 01545 571711

E-mail: wavehill@wavehill.com

Twitter: @wavehilltweets

More information:

www.wavehill.com

<https://twitter.com/wavehilltweets>

© Wavehill: social and economic research

This report is subject to copyright. The authors (Wavehill: social and economic research) of the report should be acknowledged in any reference that is made to its contents.

Authors of the report:

Dr Dyfan Powel

Endaf Griffiths

John Pritchard

Any questions regarding this report should be directed in the first instance to Dyfan Powel (dyfna.powel@wavehill.com)

Document date:

Version: Internal Draft

Client contact details:

Anwen Davies

Contents

Table of tables.....	4
Executive Summary.....	5
1 Introduction	9
1.1 Background.....	9
1.2 This Document	11
1.3 Arfor’s Timing/Timeline	11
1.4 Methodology	12
1.5 Nature of the Issue and Arfor’s Rationale.....	12
2 The Welsh Language and the Economy.....	14
2.1 Summary of the Desk Research	14
3 Further Research.....	23
3.1 Econometric Analysis of the Link between the Economy and the Welsh Language	23
3.2 Stakeholder Interviews	24
4 Profile of the Arfor Area and Baseline	32
5 Interim Conclusions and Initial Recommendations.....	36
5.1 Interim Conclusions.....	36
5.2 Initial Recommendations	39

Table of tables

Table 1: Correlation Coefficient (GVA and Welsh Speakers).....	24
--	----

Executive Summary

Arfor is a programme that works across Anglesey, Gwynedd, Ceredigion, and Carmarthenshire. The aim of Arfor is to develop economic interventions which will have a positive impact on the number of Welsh speakers and the viability of the Welsh language. A budget of £2m was earmarked for the period of 2019–2021, with spending underway at the time of writing this report — Arfor’s current work and spending are not the focus of this document.

This report assesses academic data, evidence, and policy to make recommendations for supporting and expanding the work and impact of Arfor in the future. Originally, the aim was to inform the development of a strategy and identify specific interventions. This document concludes, however, that there is no sufficient basis on which to recommend specific actions or develop a comprehensive strategy. Instead, three avenues of further action are recommended in order to develop economic interventions which have a positive impact on the Welsh language.¹

The lack of data and research on the link between the economy and the Welsh language

There is a consensus among academics, the Welsh Government, and civil society organisations that economic processes and interventions provide a means of ensuring the sustainability of the Welsh language, particularly within Welsh-speaking communities. However, debates surrounding the relationship between the economy and the language often focus on the use of the Welsh language by businesses or the benefit of the language to individuals in the labour market or to businesses in their trading (i.e. the language in the economy).

There is very little discussion regarding economic processes and their detrimental or positive impact on the language (i.e. the economy affecting the language). Indeed, as a recent comprehensive review of data has shown,² there is a lack of evidence and research on the link between economic processes and the language. Moreover, the data suggests that the efforts which have been made thus far have not succeeded in reversing the situation of the Welsh language sufficiently. It is therefore difficult to provide any specific recommendations based on the available research or experience.

Understanding of the ‘problem’ and Arfor’s rationale

The mainstream hypothesis among academics, policymakers and stakeholders is that migration patterns are the main factor having a detrimental impact on the Welsh language. The ‘problem’ is that young people leave the area, which has a damaging effect on the economy — these are individuals with valuable qualifications and who are economically

¹ A ‘positive impact’ may be defined as a contribution towards increasing the number of Welsh speakers and/or the use, sustainability or status of the Welsh language in the area. However, there is scope to develop this definition further as a result of the understanding which will be developed.

² Thomas, H., Duggan, B., Glover, A. and Glyn, E. (2020) *The Welsh language and the economy: a review of evidence and methods*. Cardiff: Welsh Government.

active. Furthermore, this out-migration results in a decline in the number and percentage of Welsh speakers in certain areas, as well as a consequent decline in the viability, vitality and sustainability of the language in those areas.

It is thought that young people desire better jobs and employment opportunities which are unavailable in the Arfor area and, consequently, leave. The logical response is to seek to 'create more jobs and better jobs' in the Arfor area — the stated rationale of the Arfor programme — in a bid to encourage young people to stay. However, the data and research which are available suggest that the 'problem' is more complicated and contradictory and that wider solutions should be considered.

The available data and evidence

Statistical data supports the theory that young people are leaving the Arfor area primarily for England. Furthermore, the data supports the suggestion that migration patterns are detrimental to the economy and likely to be detrimental to the language, as young people (and, therefore, Welsh speakers) leave the area.

Despite this, there is little evidence supporting the hypothesis that young people are leaving the Arfor area solely for employment reasons – though it is a key factor. Nor is there evidence suggesting that young people would refrain from leaving the area if more or better jobs were available locally. Indeed, contrasting evidence suggests that young people's reasons for leaving are varied, complicated, and revolve around issues such as identity and life opportunities. Moreover, studies of out-migration in Wales rarely explore factors related to gender, race or class. The gap between qualifications and the labour market, work and life patterns, as well as deficiencies in the area's infrastructure are further factors to be considered. Furthermore, economic analysis contained in this report casts doubt on any positive relationship between economic development or increasing employment and the Welsh language and speakers. That is to say, the evidence that economic growth has a positive impact on the number of Welsh speakers is, at best, not clear. Simply creating more and better jobs may not necessarily lead to young people staying.

Statistical data also shows that a large number of young people are moving into the Arfor area — probably to study at the universities — and that the number of people above the age of 30 who come into the area every year is higher now than at the beginning of the last decade. However, there is a lack of data providing any detail or an explanation as to these patterns. It is not simply, therefore, a case of young people leaving.

Discussion and conclusions

Although there is evidence supporting the hypothesis that migration is at the heart of the 'problem', there is a lack of evidence entirely supporting the suggestion that creating more and better jobs will resolve the issue. In stepping back from the focus on in- and out-migration, we can see that migration patterns are merely one of a number of economic challenges facing the area, reflecting patterns similar to those observed in any other rural area across the UK. The Arfor area does not face unique economic or demographic challenges.

Thus, the efforts to reverse migration trends from rural to urban areas among young people seek to achieve what few if any other similar rural areas have managed.

This document suggests that the economic challenges faced in the Arfor area are wider than migration alone, and that migration is itself a symptom of wider issues. In turn, the wider challenges in the area present barriers to encouraging young people to remain in or return to the area by creating more and better jobs.

Despite the relative success of the labour market in the area, which has remained similar to Welsh patterns over recent years, the outlook suggests that there are structural weaknesses in the area's economy. The gap between qualifications and the labour market, work and life patterns, as well as deficiencies in the local infrastructure are further factors likely to encourage out-migration. Moreover, the economy of the area is skewed towards sectors which have a lower base value and weaker prospects for growth. What is more, some specific sectors, such as agriculture, are likely to face structural changes following the UK's departure from the EU. Finally, factors such as globalisation and the expansion of labour markets could have an influence on language use.

The solutions and purely economic interventions which are required, therefore, are likely to entail focusing on developing diversity and supporting sectors which are likely to see greater value and higher wages. However, there is no data available to recommend which sectors or ways of working are likely to have a positive impact on the language as well as on the economy.

Efforts to attract people (specifically Welsh speakers) and enable people to move into the area, or to return to the area at a later stage in their lives, may be better and perhaps (in the meantime) more effective ways of compensating for the out-migration of young people. Yet, despite some efforts in the past, there is no wide range of data supporting or promoting specific interventions or programmes.

In the long run, economic interventions must be considered in the wider context. Although the aim of Arfor is to develop economic interventions which have a positive linguistic impact, they will ideally support, and be supported by, a range of wider social policies which enable non-Welsh speakers to acquire the language and facilitate its use. Moreover, improving and developing the appeal and quality of life in these rural areas will be further key components of any approach that tackles the issue of out-migration.

In short, due to the lack of available evidence and research, it is not possible for this report to recommend specific interventions which would achieve the aims of the Arfor programme and reverse the damaging impact of out-migration. An understanding of the link between economic processes and the language needs to be developed, as well as of the types of economic interventions which are likely to have a positive impact on the language and/or out-migration. Having developed a better understanding of the 'problem', recommendations could then be made regarding specific interventions which are most likely to have the required effect.

Recommendations

The aim of this document, therefore, is to present recommendations which will enable Arfor to reach the point at which specific interventions can be identified and promoted which have a positive impact on the Welsh language. The document recommends three actions which are co-related and a fourth relating to the ongoing pandemic:

1. Firstly, to aim to support and continue with Arfor's current work of trialling and, of key importance, evaluating and learning from interventions in the economy and to support businesses.
2. Secondly, it is proposed that a research group be established (including members from further afield than linguistic experts or those who have been associated with this subject for some years), to develop and promote an understanding of the link between the economy and the language. The group's role should be to evaluate the trialling and piloting of interventions, review wider evidence and research, and recommend effective interventions to be mainstreamed and promoted within and by the four counties.
3. Thirdly, and with a long-term period in sight, it is recommended that the work be linked with a formal body which can mainstream and promote successful interventions within the local authorities in the Arfor area as well as externally. In short, the four local authorities should consider continuing to work together formally beyond the lifespan of the programme, and should agree to mainstream and promote successful interventions amongst themselves and beyond.
4. In addition, since the impact of COVID-19 is likely to prevent projects and spending which have been planned for Arfor's current programme, it is recommended that the money be used to develop an understanding of the reasons as to why young people leave or return to the Arfor area, or to evaluate the aims of relevant projects which are implemented outside of the Arfor programme, such as the linguistic impact of developments such as Yr Egin, or to examine the recent anecdotal increase in the number of people returning to the Caernarfon area.

1 Introduction

1.1 Background

The 20th century witnessed a steady decline in the percentage of Welsh speakers in Wales. The second half of the century was a period of efforts made by individuals, civil society and, more recently, the governments of the UK and Wales to try to prevent the decrease and ensure the sustainability of the language. There were a number of successes. Legislation was introduced and the Welsh language was afforded official status, but education came to the fore as one of the main tools with which to revive the language.

Despite these efforts, the threat to the sustainability of the Welsh language remains, and a great deal of attention has been paid by academics, civil society organisations, and governments to the geographical areas which are home to large percentages of speakers, i.e. the 'heartlands'. The counties of Gwynedd, Anglesey, Ceredigion, and Carmarthenshire are often referred to as the heartlands, although a number of counties or areas within other counties share similar characteristics. There is a general consensus that these heartlands share similar social, economic and cultural characteristics, including:

1. A large percentage of Welsh speakers
2. In-migration of older people, out-migration of young people
3. Rural, with a dependence on agriculture, food and tourism
4. Market towns and university towns
5. A large percentage of public sector jobs
6. The lowest wages in Britain, and among the lowest wages in Europe.

In addition to the aforementioned, there is a consensus that the counties face a common problem: **the future of the language, its use and its sustainability in these heartlands is under threat**. There is a consensus in these counties, and farther afield, that the viability and sustainability of the language in these heartlands is vital to the status and future of the Welsh language in general.

As discussed below, there is a further consensus that economic processes have been a factor in and a reason for the decline of the language, and that there is a need to develop economic interventions that can support the language and enable it to thrive. The four local authorities share and support a desire to work in partnership and establish an economic development and language planning framework in order to respond to the challenge.

Despite this, the Welsh Government's 'Prosperity for All' strategy outlines regional structures for developing the economy in Wales in the future, which, in the opinion of many people, does not identify the heartlands as a region which requires specific or alternative economic consideration. This means that the four rural counties, wherein the Welsh language is strong and prominent, are included in economic regions in which English is most prominent and there is an emphasis on urban centres. There is a concern, therefore, that economic-language planning is likely to be sidelined, or downgraded in a regional context of this nature. There has been a call to develop economic language planning which is specific to these heartlands — the Arfor area.

Arfor

Following discussions with the Welsh Government, a budget of £2,000,000 was earmarked for the period of 2019–2021. The money is to be used by the four local authorities in West Wales (as noted above) to work in partnership to trial and evaluate economic interventions in the area.

A portion of the money has also been set aside to develop a strategic plan which would aim to ensure economic growth and economic prosperity in West Wales and, thus, contribute to the sustainability of the Welsh language. In essence, this is this report. However, as noted below, the conclusion was reached that it was not possible to recommend a range of specific actions which were certain of having a positive impact on the Welsh language. This document is therefore an interim report which presents the results of the research and preparatory work for a more detailed strategy. It provides recommendations for further action by the four local authorities to reach the point at which it is possible to identify economic interventions which are likely to have a positive impact on the Welsh language.

In considering the contents and recommendations of the report, it must be acknowledged that this spending is on the economy and on economic interventions, and not on linguistic interventions. This is an important distinction. As noted below, and reflecting the findings of the Revitalise team from Aberystwyth University and wider research, often when discussing and developing interventions regarding the relationship between the economy and the language, the focus is on the use of the language by or within businesses. However, this money has been earmarked for all types of economic development which are required in order to create better and more job opportunities, which, in turn, will contribute to ensuring the prosperity of the Welsh language. Arfor's spending is that of economic spending which aims to secure linguistic as well as economic benefits.

Finally, the data for this report was collected before the COVID-19 crisis and its effects had had an impact on Wales. It is therefore likely that the context, the economic profile, and the opinions of stakeholders will have changed by the time the data sources used here are updated.

1.2 This Document

In the summer of 2019, Wavehill was commissioned to undertake two tasks:

1. Develop a strategy to guide the work of developing economic and linguistic planning in the 'Arfor' region, West Wales (namely Anglesey, Gwynedd, Ceredigion, and Carmarthenshire), beyond the period of the current plan.
2. Assess and provide an evaluation of the impact of the interventions which have been implemented across the region in the initial/current period, by analysing the economic and linguistic impact and the short-term and long-term changes. This report acknowledges the aim of this assessment but focuses on the first step.

This report focuses on the first step and the attempt to develop a strategy for economic interventions in the area. This document is an interim report which concludes that it is not possible to produce a Strategic Plan without further work with regard to trialling and evaluating interventions.

The relationship between this document and the strategy

As the report concludes that there is no evidence base supporting a more detailed strategy or recommending specific interventions, this document replaces such a plan. However, an evaluation report will refer to this document and aim to identify lessons which were learnt from Arfor's current programme that relate to the broader issues discussed here.

This report concludes that there is a need to develop the understanding of the link between economic processes and the language, as well as of the types of economic interventions which are likely to have a positive impact on the language and limit or compensate for the out-migration of young people. Having developed an improved understanding of the 'problem', it would then be possible to recommend interventions which are most likely to have the required effect. The aim of this document, therefore, is to try to present recommendations which will enable Arfor to begin the process of trialling, learning from, identifying and promoting grassroots interventions which have a positive impact on the Welsh language. In short, the aim is to try to establish the steps which will enable the development of a Strategic Plan.

1.3 Arfor's Timing/Timeline

Although the aim of this work is to develop a Strategic Plan, the work was commissioned after Arfor's Steering Board had agreed to spend the £2m. This document and its initial recommendations acknowledge this spending and aim to develop a long-term strategy for the area and its local authorities. As part of this, the document assumes that there is **a commitment and aim within the four local authorities to continue to work in the name of Arfor in the future** towards the same or similar aims. The recommendations at the end of this document relate, therefore, to the period after the current spending window has expired, but consider and include the interventions which have already been financed.

1.4 Methodology

In order to develop a strategy, a range of evidence was collected and primary research conducted. The aim was to draw on expertise and current research as a basis for the strategy. The research included the following key tasks:

- Discussions with Arfor management staff and Board members
- Review of the academic and grey literature
- Review of the policy context
- Assessment of the available economic and linguistic quantitative data
- Economic and statistical analysis
- 43 interviews with stakeholders
- Online questionnaire sent to organisations and individuals
- Discussions with academics, the Revitalise team, and language policy experts
- Workshops with stakeholders, councillors and Arfor officers.

1.5 Nature of the Issue and Arfor's Rationale

The documentation of the Arfor programme clearly reveals the rationale of the intervention as a basis for trying to tackle the decline of the language in the area:

'The purpose of the Programme is to support the creation of more and better paid jobs in the areas with a high proportion of Welsh speakers to encourage resilience and growth of the Welsh Language.'

This rationale is based on the understanding of a problem which is very familiar to those who have an interest in language policy and the history of the Welsh language in the second half of the 20th century: **the future of the language, its use and its sustainability in the traditional heartlands is under threat**. The explanation for this is also very familiar. The argument is that young people leave the strongholds of the language so as to find better jobs and employment in cities in South Wales, England, and farther afield.

Indeed, as shown below, there is statistical evidence supporting this theory. Communities in the Welsh-speaking heartlands are suffering as a result of the effects of economic and linguistic out-migration, whilst being impacted by the in-migration of non-Welsh speakers at the same time. In essence, young, skilled and competent people who are economically active are leaving the area and having a detrimental effect on the economy. A further result of these economic and demographic processes is the consistent decline in the number and/or percentage of Welsh speakers, as well as the decline in the viability, vitality and sustainability of the Welsh language in those areas which were traditional strongholds. It must be noted that these migration patterns are not unique to the Arfor area, but rather reflect trends in other rural areas across Britain and the world. However, the effect is unique, as such migration leads to a decline in the viability of the Welsh language. Migration and the loss of young people who are competent and Welsh-speaking are, therefore, at the heart of the 'problem'.

Arfor presents a response which corresponds to this analysis of the problem. The basic hypothesis which drives Arfor's rationale is that economic growth, notably the creation of 'good jobs', will attract young people and keep them in the area, whereby helping to keep the number of speakers and the use and viability of the language high. In turn, this will protect the status of the Welsh language in the wider population. This principle of creating jobs and wealth is a longstanding claim which is inherently credible, and is a sentiment which has been echoed regularly in interviews and research work for this paper.

However, further research revealed weaknesses in the body of evidence that supports this analysis of the problem. Furthermore, it was evident that the project stakeholders had various opinions regarding the nature of the problem, as well as different definitions of core concepts within the field of study.

2 The Welsh Language and the Economy

2.1 Summary of the Desk Research

This chapter mentions the main points raised in academic literature and sets out the policy context for the Arfor programme. This chapter is not an attempt to provide a detailed overview of the literature on the economy and the Welsh language or a critical analysis of the policy context; instead, it outlines only the main themes which are relevant to the efforts to develop a strategic plan.

2.1.1 Policy context

The role of the Welsh language in economic development — and economic development's impact on the language — has been a topic of discussion for years, with an independent Task and Finish Group preparing a report on the matter for the government in 2014. Its report, much like this report, emphasised the need for further evidence and research in relation to the link between the economy and the language.

The government's Welsh language strategy, 'Cymraeg 2050',³ echoes previous strategies such as 'A living language: a language for living - Welsh Language Strategy 2012 – 2017'⁴ in its assessment of the economic context of the Welsh language in rural areas. While the strongholds of the Welsh language are acknowledged, there is also recognition that these areas are dependent on jobs in the public sector, or on jobs associated with specific 'rural' industries such as agriculture, tourism or the food industries. The current (and legacy) strategy also acknowledges the economic factors that negatively impact the language and its sustainability, most notably the issue of young people leaving the area. Importantly, however, the strategy, echoing the government's 'Prosperity for All: the National Strategy',⁵ acknowledges the need for economic and social change and to develop the economy in a manner that can sustain the language:

'We cannot expect Welsh-speaking communities to remain static while the nature of society is changing. As such, the Welsh Government fully recognises the importance of developing a thriving, sustainable economy in rural areas, including in the areas described previously.'⁶

³ <https://gov.wales/sites/default/files/publications/2018-12/cymraeg-2050-welsh-language-strategy.pdf>

⁴ <https://llyw.cymru/sites/default/files/publications/2018-12/strategaeth-y-gymraeg-2012-i-2017-iaith-fyw-iaith-byw.pdf>

⁵ <https://gov.wales/sites/default/files/publications/2017-10/prosperity-for-all-the-national-strategy.pdf>

⁶ Cymraeg 2050 p.62

However, these national strategies focus primarily on highlighting or maximising the value or impact of the language within or upon businesses, rather than on recognising the economy and economic processes as tools with which to influence the language and its use. This is unsurprising when considering the lack of data that offers evidence or identifies specific economic processes or interventions that have a positive impact on the language (as discussed below). Indeed, the funding of the Arfor programme may be considered the first and most significant effort by the Welsh Government to engage explicitly and directly in exploring and developing economic interventions with the aim of generating a positive impact on the language.

2.1.2 Research on the Welsh language and the economy

This subchapter provides an overview of academic studies on the Welsh language and the economy. The main weakness in this subject area, as noted by the Revitalise team researchers,⁷ is the emphasis placed on the relationship between the language and the economy. Studies tend to focus on the use of the Welsh language by businesses, as well as on the benefit of the language to individuals in the labour market or to businesses as they trade, i.e. the language in the economy (language>economy). There is very little discussion surrounding economic processes and their detrimental or positive impact on the language, i.e. the economy affecting the language (economy>language). As the Revitalise research team noted, drawing on evidence and their research seminar discussions:

‘Whereas there is strong and extensive recognition of the importance of a viable economy to language revitalisation, there has been a lack of comprehensive and detailed research that seeks to understand how and when economic variables or processes impact either positively or negatively upon levels of linguistic vitality.’⁸

‘The most significant research gap identified, however, was the lack of a detailed understanding regarding how economic changes can impact positively or negatively on levels of linguistic vitality.’⁹

Efforts to consider and develop an understanding in this area, as observed in the Welsh Government’s linguistic strategy, also tend to regard these two different relationships (language>economy and economy>language) as a single issue. Thus, there is a tendency for policymakers to turn to interventions which facilitate or promote the use of the language in the economy (language policies>economy), rather than to economic policies which support the language (economic policies>language).

These conclusions echo the review of evidence collated on behalf of the Welsh Government recently.¹⁰

⁷ <http://revitalise.aber.ac.uk/en/>

⁸ Royles, E., (2019). *Workshop Briefing Report 3: Language revitalisation and economic transformation*, <http://revitalise.aber.ac.uk/en/media/non-au/revitalise/Adfywio---Workshop-Report-3---FINAL.pdf> [Online] p.9

⁹ Ibid. p.3

¹⁰ Thomas, H., Duggan, B., Glover, A. and Glyn, E. (2020) *The Welsh language and the economy: a review of evidence and methods*. Cardiff: Welsh Government.

In short, there is a significant lack of research which aims to explain and understand the impact of variables and economic patterns or processes on levels of linguistic vitality or sustainability. The basis for proposing a range of specific interventions and policies within any strategy is therefore weak due to the lack of evidence available.

Despite this, over the past 20 years, some studies have proposed data and evidence to assist the efforts to gain an understanding of the subject, the area, or the development of economic planning which supports linguistic sustainability.

The impact of economic processes on the language

Following a review of the literature relating to the relationship between the economy and the language, a Welsh Government report concluded that the emphasis was more often than not on linguistic processes impacting the economy than on the economic processes impacting the language:

‘Most of the evidence that was included... focused on understanding or assessing the effect of linguistic factors on various economic variables, as opposed to the effect of economic variables on language.’¹¹

Among those who have discussed the economy>language relationship, the focus has mainly been on the labour market or on the relationship between the language and economic outputs:

‘Labour market outcomes or variables are those most commonly examined in the literature, with 23 out of the 57 references exploring the relationship between language and earnings, employment, economic activity or inactivity, skills needs or occupational outcomes.’¹²

In short, the lack of research on the effect of economic processes on the language is a weakness in this field and restricts the ability to recommend specific economic interventions. Some published research provides key points for consideration, e.g. the reports of the Revitalise team, who note that the use of the language by a business or company can have a positive impact on the status and use of the language on a micro-level. Reference was made to a whisky company in Scotland and the way in which ‘their use and normalisation of Gaelic within workplaces has the potential to positively contribute to its wider normalisation within education and society’.^{13,14}

¹¹ Thomas, Hefin; Duggan, Brett; Glover, Alison and Glyn, Eluned (2020) *The Welsh language and the economy: a review of evidence and methods*. Cardiff: Welsh Government, p.84

¹² Ibid. p.33

¹³ Royles, E., (2019) t.10

¹⁴ It is worth noting also that this instance highlights that business-level interventions can have a wider impact on the language in a community, i.e. a language>economy relationship can develop into an economy>language relationship.

It was also noted that researchers in Scotland were of the opinion that employment opportunities which require the skills and use of a minority language are being located outside of areas with the highest density of speakers. Reference was made to the fact that employment opportunities in the creative industry in Scotland, where there is a demand for the skills and use of Gaelic, are being located inside of Glasgow.¹⁵ The opportunity to develop and take advantage of the linguistic labour market in the language strongholds is being lost as a result. In the context of Arfor and Wales, an evaluation of the linguistic effect of a development such as Yr Egin in Carmarthen will provide a valuable contribution to this discussion and will develop the understanding of the value of developing the language-based labour market in the Arfor area.

Beyond the findings of the Revitalise team and the Welsh Government's literature review, one must look further to collect research on the effects of economic processes on the language. The last decades of the 20th century witnessed growth in the tourism and leisure sector in Wales. Commitments are made and specific attention is now paid to the sector in national and local economic strategies. The interviews conducted for this paper reflected the impression that this sector is vital for rural Wales, particularly in terms of employment.

Indeed, 20 years ago, Phillips concluded that there were clear economic advantages to the tourism industry in terms of employment and spending, noting that some £1.3 billion was spent in Wales every year by the end of the 1990s and that the sector employed 100,000 people either directly or indirectly.¹⁶ The picture is similar to the present day. As outlined below, the sector employs a higher percentage than the Welsh average.

Despite this, Phillips raises a key question regarding the cost and long-term impact of such a sector in the area. He presents evidence of the link between tourism and in-migration and refers to studies which found that half of the people who had moved to Llandudno had previously visited the area as tourists¹⁷ and that 59% of summer/holiday home owners intended to retire to the area in the future.¹⁸

'The greatest threat... is the way in which tourism encourages and promotes permanent in-migration of non-Welsh-speaking people to the Welsh heartland areas [author's translation].'¹⁹

One of the key economic sectors in the Arfor area attracts in-migrants, who are unlikely to be able to speak Welsh in great numbers.

¹⁵ Ibid. t.11

¹⁶ Phillips, D. (2000). 'We'll keep a welcome? The effects of tourism on the Welsh language', in Jenkins, G.H. and Williams, M.A. (eds.) *Let's Do Our Best for the Ancient Tongue - The Welsh Language in the Twentieth Century*. Second edition, Wiltshire: CPI Anthony Rowe, 2015, pp. 527-550.

¹⁷ Law, C.M. and Warnes, A.M. (1973). 'The movement of retired people to seaside resorts: A Study of Morecambe and Llandudno', *The Town Planning Review*, Vol. 44, No. 4 (Oct. 1973), pp. 373-390. Not available for this review.

¹⁸ Pyne, C.B. (1973). *Second homes*. Caernarfon County Planning Department.

¹⁹ Phillips, D., and Thomas, C. *The Effects of Tourism on the Welsh Language in North-West Wales*, p. 77. Aberystwyth: University of Wales Centre for Advanced Welsh and Celtic Studies, 2001.

Wavehill and Four Cymru have also published the initial findings of their studies on the sector in Gwynedd. Statistical research found that there was a link between employment growth in the sector and an increase in the number of Welsh speakers, suggesting that the jobs which are created in the sector have a positive impact on the Welsh language.²⁰ Despite this, the long-term effect of the sector, as suggested by Phillips, provides an important context to any short-term gain:

'The report does corroborate circumstantial evidence with hard facts, and offers concrete objective proof that the effects of tourism pose a very serious threat to the language's future. And the most harmful effect by far is the way in which tourism encourages in-migration [author's translation].'²¹

Migration

Over 20 years ago, Blackaby and Drinkwater explored the employment of Welsh speakers who had (apparently) moved from the heartlands to North East or South East Wales:

'Firstly, there do not appear to be vast differences in the occupational composition of Welsh- and non-Welsh-speakers in west Wales. The differences are encountered when the other two areas are considered [South East and North East Wales]. In these areas, Welsh-speakers were far more concentrated within the higher occupations. For example, over 45 per cent of Welsh-speaking males in south-east Wales appeared within the top three occupational classifications, but this was true for less than 27 per cent of non-Welsh-speakers... Similar patterns are observed if social class is considered... 45.4 per cent of Welsh-speakers in south-east Wales were in the professional, managerial and technical social classes, but this only applied to 24.9 per cent of non-Welsh-speakers.'²²

Following on from work conducted by Giggs and Pattie,²³ they attempt to give an explanation for these differences, and argue that Welsh speakers who migrate from the west are more likely to move to areas in the south and south-west (notably Cardiff and Swansea). Welsh speakers are able to gain better employment in predominantly non-Welsh-speaking areas. Moving to Cardiff or a similar area therefore provides improved employment opportunities (in comparison to the west) for those individuals who speak Welsh:

²⁰ <https://www.arsyllfa.cymru/the-effect-of-tourism-on-language-in-Gwynedd/>

²¹ Phillips, D. 'Welcome to Wales?' in:

<http://www.wales.ac.uk/en/CentreforAdvancedWelshCelticStudies/ResearchProjects/CompletedProjects/SocialHistoryoftheWelshLanguage/WelcometoWales.aspx>

²² Blackaby, D.H. and Drinkwater, S.J. (1997). 'Welsh Speakers and the Labour Market', *Contemporary Wales*, Vol. 9 pp. 158-70 [Online], p.167

²³ Giggs, J., and Pattie, C. (1992). 'Croeso i Gymru, Welcome to Wales: But Welcome to Whose Wales?' *Area*, 24(3), 268-282. Accessed April 22, 2020, from www.jstor.org/stable/20003146

'It seems likely that many well-qualified individuals from west Wales have moved to larger cities because of the lack of suitable employment opportunities in rural areas (Giggs and Pattie, 1992), and since Welsh-speakers tend to have a greater cultural attachment to their homeland, Welsh-speaking migrants from west Wales are more likely to choose cities such as Cardiff and Swansea over those outside the Principality... It is found that 58.5 per cent of Welsh-speaking migrants who moved a distance of 30 kilometres or more within Wales possessed a higher education qualification. This was over double the percentage from non-Welsh-speakers (28.2 per cent). Therefore, it seems likely that a large percentage of highly educated Welsh-speakers are moving within Wales in order to further their careers... For whatever reason, Welsh-speakers appear to do better in the Welsh labour market than their non-Welsh-speaking counterparts. It is found that Welsh-speakers experienced sizeably lower unemployment rates than non-Welsh-speakers in 1991... The occupational advantage of Welsh-speakers was most noticeable in areas where only a small minority of the population were able to speak Welsh.'²⁴

It could be suggested that the authors are theorising that Welsh speakers are choosing cities in Wales because of the cultural link. Family links, university, and friendship circles could be other possible motives. However, the data supports the argument that they are moving and, in the main, are gaining better employment (which pays better), whatever the reason. It must be noted, however, that the data and argument date back to 1997 — there has not been any update or response since then.

Jones provides a further and strong basis for the traditional narrative and rationale relating to migration patterns in areas such as Arfor,²⁵ although he acknowledges that there are shortcomings in this subject area and there is a lack of research into the relationship between out-migration and the Welsh language. He claims that the majority of individuals who left the heartlands of West Wales did so for reasons relating to employment:

'It needs to be borne in the mind that economic factors... may be even more important for individuals' decisions concerning migration than their own personal characteristics.'²⁶

Jones' research, as well as the bulk of the general narrative regarding outward migration from the west (which was often repeated in interviews conducted for this work), focuses on economic and employment reasons as factors which motivate people to move. In short, young people are leaving the Arfor area and the west to look for work and better wages in Cardiff or Swansea. Yet, there is very little research which examines the narratives and stories of individuals and their reasons for leaving and this is an area in which there is almost no data whatsoever, and almost no qualitative data. This can be problematic, given the personal and objective nature of migration at an individual level.

²⁴ Blackaby & Drinkwater (1997). pp.167-168

²⁵ Jones, H. (2010), 'Welsh Speakers: Age Profile and Outmigration', in Morris, D. (ed.), *Welsh in the Twenty First Century*, (Cardiff: University of Wales Press).

²⁶ Jones, H. (2010), p.123

Recent work undertaken by Cunnington Wynn is an exception in this respect. After conducting a series of interviews with individuals in towns in North and West Wales, she concludes that people's reasons and motivations for migrating are multilayered and complex. Although economic and employment reasons for migrating are clear, the discussion surrounding employment tended to be superficial, but discussions regarding matters relating to identity and a feeling of belonging were important considerations for the young people:

'The research found that out-migration among young people from the Welsh heartlands was dependent on a number of complex and multi-layered factors, and this does not support the work of Jones (2010) who asserts that young people leave the traditional 'Welsh' communities for economic reasons only. Indeed, the reverse was found to be true, namely that these young people's choices were dependent on their feeling of belonging and their integration patterns in the communities under consideration. Here, there is a discussion on the importance of considerations regarding the Welsh language, culture and nationality in relation to their feeling of belonging and their integration patterns [author's translation].'²⁷

Examining the evidence from other parts of Britain, we see conclusions similar to those made by Cunnington Wynn. In a publication in 2020, the Social Mobility Commission and the Institute for Employment Studies attempted to understand and explain individuals' motivation for leaving disadvantaged and rural areas.²⁸ The report presents evidence which shows that out-migrants are much more likely to move in their early twenties and if they have a degree or higher-level qualification. What is more, it found that females were more likely to move than males — findings which reflect migration patterns in the Arfor area, too. Economic and employment motives are important to these out-migrants, albeit not the only reasons for moving. The benefits mentioned by out-migrants are related to a range of factors, such as better healthcare, better education, better and more affordable public transport, as well as social activities which tend to be more common and attractive in urban areas. These are all factors which relate to living standards, and are not economic factors. Indeed, out-migrants acknowledge that living costs are higher after moving to cities and that this is one of the negative consequences of out-migration. However, in the opinion of the out-migrants, it is a price worth paying, given the wider benefits.

The report also suggests that people do not remain in their native areas for economic reasons. The viability of social connections and cultural, personal and familial reasons are all influential factors. This is important, given that the main policy response to out-migration from Welsh rural areas has focused on economic factors and employment, which are not seen to be factors that induce people to remain in their native areas.

Some studies and, again, Dylan Phillips' work have explored the linguistic and economic impact of in-migration:

²⁷ Cunnington Wynn, L., "'Beth yw'r ots gennyf i am Gymru?": Astudiaeth o allfudo a dyheadau pobl ifanc o'r bröydd Cymraeg', *Gwerddon*, 28, March 2019, 43–63, p.60

²⁸

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/902943/Moving_out_to_move_on_report.pdf

'As for the effect of in-migration on the Welsh language, the research clearly revealed that the greater the number of non-Welsh-speaking inhabitants within a community, the more the use of the Welsh language was curtailed. Welsh-speaking inhabitants in the three communities studied used their mother tongue extensively in a wide range of local community activities such as *eisteddfod*, *noson lawen* or *gymanfa*, and were members of societies such as *Merched y Wawr*, the *Urdd*, and the Young Farmers. But the greater the number of non-Welsh speaking in-migrants living in the community, the greater the pressure on Welsh speakers to turn to the use English [author's translation].'²⁹

Although there is some evidence supporting the general narrative relating to out-migration from the west, there is also evidence suggesting that individuals' motives for leaving areas such as Arfor are multilayered and complex. Furthermore, there is a consensus among the few academics and researchers who have studied the link between out-migration and the Welsh language that there is a lack of research and discussion. The reasons for leaving the Arfor area could, therefore, be economic or related to identity, culture or wider reasons. In the meantime, the evidence regarding the effect of in-migration suggests that it is detrimental to the language when substantial numbers of non-Welsh-speaking people move to communities in which the Welsh language is strong.

The relationship between specific sectors and the language

Wavehill and Four Cymru have published the findings of initial research into economy>language issues. In addition to the findings relating to the tourism sector (see above), work has been presented on the agricultural sector³⁰ and the public sector³¹ in Gwynedd. The research found that there is no statistical relationship between the agricultural sector and the language, and one should not expect that an increase in employment in the sector will have a significant impact on the language and number of speakers. However, the work was keen to stress the indirect role of the sector as a key part of the infrastructure of communities in the rural areas of Wales which support the language through the social connections and patterns promoted by the sector.

Further research regarding the impact of employment in the public sector on the language found that the statistical relationship was a negative one; in other words, as employment in the sector increased, particularly between 1994 and 2003, the number of Welsh speakers has decreased. Since 2003, the relationship between the employment data and the language has been weak, suggesting little to no significant relationship. The findings are unexpected and instinctively difficult to accept, and explaining the negative relationship is even more difficult without further research. However, it is worth considering that although the number of Welsh speakers in the public sector in Gwynedd is relatively high, it is possible that the sector is creating a demand which attracts these Welsh speakers from other sectors in the economy; in other words, the sector itself does not encourage more Welsh speakers to live and work in the area, but rather displaces them or 'sucks' them away from other sectors in the county.

²⁹ Phillips, D. 'Croeso i Gymru'

³⁰ <https://www.arsyllfa.cymru/agriculture-and-the-welsh-language/>

³¹ <https://www.arsyllfa.cymru/language-and-the-public-sector/>

Paucity or lack of research

Whilst reviewing the literature it became apparent that there is a lack of research that evaluates the impact of programmes and public spending in the field of the economy and the sustainability of the language. As a result, one obvious challenge to this work is the lack of methodology relating to measuring the effect of economic activity on linguistic sustainability. The Revitalise team have started the debate and drawn attention to the need to recognise the micro- or macro-impact, for example;³² clearly, however, there is scope to develop methods for evaluating the linguistic impact of economic interventions. In addition to the lack of methodological consensus, there is very little evidence that activities which have been implemented in the Arfor area have had a positive or negative effect on the linguistic vitality of the area.

³² Royles, E., (2019)

3 Further Research

In an attempt to develop a body of data which would provide a foundation for the efforts to develop Arfor's Strategic Plan, data was collected and analysed. As noted in the introduction, several research tasks were undertaken, including:

- Assessment of the available economic and linguistic quantitative data
- Econometric analysis of the link between the economy and the Welsh language
- 43 interviews with stakeholders
- Online questionnaire with organisations and individuals
- Discussions with academics, the Revitalise team, and language policy experts
- Workshops with stakeholders, councillors and Arfor officers.

Pertinent data and conclusions are presented in this chapter.

3.1 Econometric Analysis of the Link between the Economy and the Welsh Language

Econometrics involves applying statistical analysis methods to quantitative economic data in order to identify and highlight economic relationships. The aim was to try to explore the basic hypothesis which is at the heart of the project's aims and rationale. Specifically, we set out to **test the relationship between economic development and growth or sustainability in the numbers of Welsh speakers**. GVA growth alongside a number of variables (including employment and wage data) were lagged for 1 and 2 years to examine any delayed effect. However, given the time and resource constraints in proving the principle, these results should be regarded as merely preliminary findings. **The following should not be regarded as far-reaching and comprehensive.**³³ Furthermore, this work was not undertaken in the conventional format for work of this nature, which is to use regression analysis to reach a theoretical assumption; this data was analysed without any preconceptions.

A score of +1 in Table 1 below shows a perfect relationship between variables, i.e. that the number of speakers increases as GVA increases. A score close to zero indicates that there is no meaningful relationship between GVA and the number of speakers, whilst a score of -1 indicates a perfect negative relationship, i.e. as GVA increases, the number of speakers decreases.

³³ In trying to prove a statistical relationship between the economy and the language, as well as the effect of one on the other, it was clear that there was a lack of suitable data with which to conduct a thorough and comprehensive statistical analysis. It was only possible to scratch the surface. Imperfect statistics and data are the best that are available. The number of Welsh speakers is neither a good measure of language vitality or sustainability nor a good measure of language use within a community. Nor are GVA and employment perfect measures for economic development. However, this is the historical data which is available.

As shown in Table 1 below, having lagged GVA growth by 1 year, only in Gwynedd do we observe a significant and positive relationship, although it is not particularly strong. It is clear that there is not a very positive relationship between the growth of GVA and the number of Welsh speakers.

Table 1: Correlation Coefficient (GVA and Welsh Speakers)

	Baseline	Lagged after 1 year	Lagged after 2 years
Gwynedd	0.029	0.145	-0.201
Anglesey	-0.522	-0.607	-0.661
Ceredigion	-0.325	-0.240	-0.129
Carmarthenshire	-0.132	-0.089	0.059
Arfor	-0.360	-0.264	-0.319

Data: ONS / Wavehill

Indeed, in three of the four local authorities, the opposite is true. It appears that there is a negative correlation between the growth of GVA and the Welsh language. In the case of Ceredigion and Carmarthenshire, this negative relationship tends to weaken over time, but in Anglesey the negative situation consolidates over time.³⁴ Similar or slightly less negative results are generated when employment is included as a variable in the regression analysis. The logistical regression of the ‘Understanding Society’ data for 2009–2011³⁵ suggested that there was no meaningful relationship between economic activity and the Welsh language.

The limitations of this assessment must be noted and it is vital not to draw any far-reaching or sweeping conclusions on this basis. However, the data presents new considerations and the understanding of the problem and the rationale for the Arfor programme. **The data does not support the rationale that economic development, specifically the creation of more jobs, is always linked with an increase in the number of Welsh speakers.** Indeed, it is suggested that economic growth of the type observed in Anglesey and, to an extent, in Ceredigion and Carmarthenshire since 2005 corresponds to a linguistic decline. It must be stressed that the evidence does not support the suggestion that economic development *causes* a decline in the number of speakers, but there is a statistical *relationship* between the economic development in places such as Anglesey and a decline in the number of speakers. **The nature of this relationship is one that needs to be further explored and it is central to the rationale and aims of Arfor.**

3.2 Stakeholder Interviews

Twenty-nine semi-structured interviews were held with stakeholders, individuals and societies in Wales. The stakeholders were identified by the Arfor Board and Officers and the research team and chosen on the basis of their activity, interest or research in the field of language policy, the economy, or the Arfor areas. Moreover, organisations, societies and individuals were invited to contribute and share their views and ideas via a questionnaire. This subchapter deals with the main themes of the interviews and the questionnaire, but

³⁴ The R-squared value is also 0.43 in this instance, which suggests a reasonable fit.

³⁵ 1st wave data which is not repeated, unfortunately.

every quotation is presented anonymously, in accordance with the terms of the interviews. Many have also been translated.

The nature of the issue and Arfor's rationale

Arfor's rationale was presented to the stakeholders while quoting the programme's official documentation:

'The purpose of the Programme is to support the creation of more and better paid jobs in the areas with a high proportion of Welsh speakers to encourage resilience and growth of the Welsh Language.'³⁶

Stakeholders tended to vary in their responses when asked for their opinion on the rationale. Over half understood and concurred with Arfor's rationale, but a substantial minority sought to challenge it.

Those who agreed expressed their satisfaction and often repeated the consistent and familiar narrative in relation to the problem at the heart of the programme. They highlighted the problem of out-migration, particularly among young people, and suggested that creating employment or 'good jobs' in the area was a factor which could prevent young people from leaving. Indeed, such comments revealed that the presumed 'end result' of the Arfor programme is that of improving employment opportunities for young people in the area, implying that this will inevitably have a positive effect on the linguistic situation:

'The rationale is completely clear because the survival of the Welsh language in the heartlands is important [author's translation].'

'Having a workplace which is Welsh-speaking is clearly going to strengthen the Welsh language socially [author's translation].'

'Job opportunities in the rural areas are important to keep young Welsh speakers in the area [author's translation].'

'We need to give young people a reason to stay in the Welsh rural areas and to live and prosper where they are. The depopulation is shocking. The statistics are shocking. We're blind to it. But it's a serious problem. We need to see the language grow and keep our people [author's translation].'

'With regard to having an impact, because the overarching aim is to stop young people leaving the county, we have to look at what measures are going to be put in place to look at that.'

³⁶ <https://www.rhaglenarfor.cymru/index.en.html>

‘The main focus should be to undo the process of the outward movement of young people. That would be one of the most important measures of Arfor’s success over the next 10 years [author’s translation].’

However, a minority of stakeholders were more prepared to challenge the programme’s stated rationale as well as the nature of the problem which Arfor seeks to address. Some drew attention to the geographical area under consideration and the problematic conceptualisation of the ‘*Fro Gymraeg*’ which is often used when trying to develop policy interventions whilst avoiding defining the ‘end result’:

‘It’s based on wishy-washy definitions of the “*Fro Gymraeg*”. What are we trying to create or recreate here [author’s translation]?’

Others stressed the tendency for many who are active in the field of language policy to focus on the role of the Welsh language within business and the economy, rather than on the effect of economic processes on the language. Although evidence supports the fact that there are benefits when the Welsh language is used and displayed by businesses, contributors noted that there was very little evidence with which to steer economic processes and interventions which are sensitive to the language. Furthermore, the public and policy discussions were thought to revolve around the role of the Welsh language within the economy, rather than around the role of the economy and its processes having an effect on language use patterns. In the opinion of these stakeholders, consideration should be given to the effects of economic processes on the language, rather than to the effects of the language on the economy and business.

Reference was also made to wider factors that are thought to contribute to the decline of the Welsh language. Some stakeholders believed that the side effects of globalisation and the expansion of labour markets are factors which influence the use of language, as well as motivating young people to leave their native areas. Others were keen to emphasise factors that limit life and work opportunities in the area, and often focused on the weaknesses of the transport, housing and digital infrastructure.

Some stakeholders also questioned the rationale of the programme by challenging the definition of ‘better jobs’. These suggested that there was no clear definition of the meaning of a ‘better job’ and that a ‘better job’ could be defined according to the wage level, the quality of life or its contribution to the sustainability and viability of the language. Others also challenged the idea that Welsh speakers find it more difficult to obtain ‘better jobs’. What is more, a few suggested that there was no causal link between a lack of ‘better jobs’ in the area and the language. Rather, it was merely a coincidence that there was a lack of ‘good jobs’ in an area in which the Welsh language is strong:

‘That’s suggesting people who speak Welsh don’t have as good jobs as those who [only] speak English. Creation of more jobs is good, but I’m not sure if that ties to Welsh language capability — don’t think Welsh speakers are more disadvantaged. The reverse is probably true, particularly in the public sector.’

Some stakeholders criticised the rationale of the project and were suspicious of the understanding of the ‘problem’ at the heart of the rationale, i.e. that young people are leaving the area so as to look for ‘better jobs’. Whilst acknowledging out-migration as a significant issue, these stakeholders suggested that there was a need to examine a wider range of factors that encourage out-migration, and that there was a need to consider shifting the focus of Arfor towards wider goals such as attracting people back to the area:

‘It’s much more complex than just work. That’s the “official line” — you have to say that it’s lack of jobs. But it’s far more complex: [out-migrants] don’t feel part of the community ... they don’t want to be “Welsh” if that means being a farmer. Migration is part of the pattern of life. And they feel that they should go — it’s a measure of success. That will never change [author’s translation].’

Finally, some turned their attention to the years of work and support given to businesses and economic sectors. Providing support to economic sectors in these areas in order to create more jobs was not succeeding in keeping young people from leaving.

‘The model is not working. What they are doing isn’t working. There’s no significant change after everything that’s been offered. We have truly missed an important point by putting all our efforts into creating jobs and the idea that better jobs will attract people back or stay. We’re talking about poor areas that are not desirable. We haven’t got the fundamentals right in this respect and there’s a real lack of understanding about what people are like on grassroots level. The last 20 years haven’t worked — we’re not in a better situation now... We need to make the areas better places to live in order to attract more people back [author’s translation].’

One possible conclusion from such an argument is that continuing with interventions such as those which have existed up to now is likely to further improve the situation.

Lack of research

A consistent and clear theme raised during the interviews, particularly by researchers and policymakers, was the lack of research and robust data available to assess, develop and draw up effective evidence-based policy in the field. Some academics and policymakers have focused on the lack of datasets available that may enable quantitative and statistical analysis in the field, while other researchers have highlighted the lack of research analysing the link between the economy and its impact on the language. Others suggested that there was neither a wide body of evaluative work available in relation to the impact of the economy on the language nor enough evidence to explain trends that have been observed in Wales over the past decades:

‘There isn’t a clear idea about what they want to do. They don’t have clear objectives and measures to look at improvement — it’s starting from a shaky premise because no evidence, and not particularly capturing evidence as we go through, so it’s all a bit woolly.’

‘There’s not enough work on the effect of the economy on the language. Which sectors should we be developing? What type of initiatives are going to create better jobs? What type of larger economic developments are going to help [author’s translation]?’

‘Regarding having an impact, because the overarching aim is to stop young people from leaving the county, what measures are going to be put in place to look at that? There are social issues around outward migration. Perhaps research should be done on why people leave. We don’t have any baseline to start from. So the issue is it isn’t measured appropriately, so won’t be able to demonstrate what it has achieved.’

Strategic action

There was considerable consensus among the stakeholders regarding the need to take action on a strategic level as well as for local or grassroots interventions and support for specific businesses. However, there was no consensus regarding the ideal focus of the strategic action. The ideas often lacked detail and were also experimental and ambitious in nature. Another consistent theme which became evident in the comments on strategic action was the need for or the advantage of having the four local authorities working and acting together — an issue which is discussed below.

One group of responses focused on universities, for example, and the possible role of the four institutions located within the area. Indeed, attention was drawn to the extraordinary fortune of having three universities located within adjacent and rural local authorities. Stakeholders believed that there is potential to bring the universities closer and for them to be more involved in the economic planning and development of the workforce within the area. The Arfor concept was seen to be a possible means of steering the work of the universities:

‘The universities have a role to play. As they contract due to the financial situation, are they going to be able to contract and return to their core values and be a part of the community rather than businesses — recreate their vision? Bangor was established to educate the local area and provide a bridge to the world locally. The connection is not strong enough at all now [author’s translation].’

Others argued that Arfor, as it represented the views of four counties, could influence national policy. Planning regulation was a particular and consistently raised issue alongside the belief that the system did not ‘fit’ the rural economy or the linguistic situation of the Arfor area:

‘One of the things that frustrates me is the minor rules regarding countryside planning — it’s fairly simple to develop in a town compared with a rural area. All types of businesses have failed to develop because of the planning system [author’s translation].’

Several stakeholders had far-reaching and ambitious visions regarding the long-term economic aims and effect of the concept. For some, the aim should be to transform the economic horizons and the nature of the labour market in the area:

‘The creation of a regional labour market within Arfor is important, where people from the south-west of the region think that they can move to the north-west for a period. It would become part of people’s natural choices [author’s translation].’

‘The most ambitious thing... [is] the idea of creating a railway along the west. Creating a dual carriageway along the Heads of the Valleys road has cost about £1bn, so it’s not beyond reason for four local authorities who are close together to see this as a way of connecting the region... [author’s translation].’

Developing the Arfor area as a formal actor

A number of stakeholders recognised the possible benefits of the four local authorities working as one, and were keen to see Arfor act in a strategic manner as an actor seeking to influence governmental policies and regional economic planning, particularly in the context of the development of city regions and growth deals. These stakeholders hoped to see Arfor by capitalising on the combined influence of four local authorities, ensuring that issues such as out-migration, rural infrastructure, and the Welsh language were on the agendas of economic policymakers.

Several stakeholders also saw potential in adding other local authorities to Arfor in the long term in order to strengthen the influence and power of the region as an actor, and (in their opinion) there was no reason as to why Pembrokeshire, Conwy and possibly Powys and parts of the Clwyd could be included. In short, a concept such as Arfor was seen to be a means of multiplying the influence of rural local authorities that face similar economic, demographic and linguistic challenges, and to increase the opportunities to promote good practice and direct wider strategies, policies and interventions:

‘We need to work with the county councils. There are models for those types of things. Establish a joint committee if necessary. The Heads of the Valleys have come together to lobby together and to get the “Heads of the Valleys” road. This depends on a willingness to cooperate, of course [author’s translation].’

‘The problem is if you go on a county-by-county basis, you tend to see that they try hard. You see in Carmarthen a commitment to change things and fight for the language. But when you look at the list of specific items that they’re trying to achieve, it looks like business as usual. Similarly for Arfor, there has to be an ambition which is greater than in the counties separately. It looks to me as though the four counties are doing their own thing. So we need an ambition to connect the four counties together more, given them some power to argue for a response from the government to fight market failure... [author’s translation].’

‘One thing is to be clear about the aims of promoting the general narrative of supporting the economy in Welsh-speaking areas. But how much of the work to achieve this can be drawn from Arfor’s spending and how much happens as a result of the ability to influence other places? We need to use leverage in order to do that effectively. There needs to be a clear aim about what is required and how to achieve it in the long term. How does Arfor work as a whole? If they could work with a common aim with other [local] governments, then Arfor could achieve so much more. But that’s really challenging.’

‘If the budget is £2m, that isn’t much to leave a significant footprint. The other way to do it could be to influence others to take action, which could leave a greater long-term legacy. There should be long-term aims. We need to create a cultural and political change which is far more challenging but a lot more effective. The WDA, for example, had regional targets for jobs and a regional economic planning method 10 years ago which was more sensitive to the needs of Welsh-speaking areas. The city regions just don’t give any consideration to the language [author’s translation].’

‘Arfor could be promoting the mainstreaming of the language within economic planning — not just acting on that but as a powerful influence [on others] also [author’s translation].’

A minority also acknowledged the political context and saw Arfor as a means of developing and justifying the argument for additional and prolonged support for the area:

‘Research is needed to support the argument and put meat on the bones of the argument that we need a rural deal for Wales. The case needs to be made for an economic rural deal ... I hope that what we are doing and achieving with Arfor provides a means of approaching the Welsh Government and demanding the continuation and development of the programme. A rural deal would be great, but at least [justify] continuing as Arfor.’

Specific interventions

There were plenty of ideas about programmes and interventions which stakeholders believed could be financed through Arfor. These suggestions can be divided into three categories, as well as into a fourth group of responses that called for funding further research and to evaluate existing interventions.

Firstly, some argued that there should be more funding for existing programmes. Specific programmes and sectors were named, such as Llwybrau’n Lleol, the food sector in

Carmarthen and the tourism sector in the north. The justification for this was that of economic pressure, the lack of funding with which to support these sectors, and the fact that they had been identified as key sectors in the area.

Another group of stakeholders were keen to see Arfor investing in innovative interventions and programmes and examining alternative types of support. Often the justification for this was the argument that funding already existed for interventions and key sectors. Some stakeholders also proposed that economic sectors such as agriculture, which employ relatively small numbers and add less value than do other key sectors, should not be supported.

Other stakeholders were more ambitious, several of whom — though often aware of the limitations of the funding which is available — suggested that the focus should be on developing the digital infrastructure of the area as a means of reducing or diminishing the impact of the geographical and economic remoteness of the area:

‘I think that we have to be open-minded when it comes to jobs. After working with Terry Matthews, [I believe] that one of the things is that we make sure that we are connected. The digital infrastructure is more important than road and rail infrastructure — it connects us to the world.’

4 Profile of the Arfor Area and Baseline

This chapter discusses the socioeconomic situation in the Arfor area.

Arfor area

Arfor is a hybrid area encompassing four local authorities: Gwynedd, Anglesey, Ceredigion, and Carmarthenshire. The area comprises over one third of the land area of Wales. However, the population of Arfor is just over 450,000, which is about 14% of the total population of Wales. The population density is much lower than the Welsh average.

The area can be described as a rural one, but has unique characteristics which make it different from other rural areas in the UK. It is home to three universities, as well as a port which provides an international link. On the whole, the four local authorities face a similar situation and similar challenges.

Despite this, the transport infrastructure and commuting patterns weaken the suggestion that the four counties can be regarded as an economic region. There is no north–south infrastructure link which compares with the west–east links, and commuting and work patterns between the two northern counties and the two southern counties are weak. Furthermore, commuting and work patterns tend to move from west to east, and whilst many live and travel to work within Bangor–Caernarfon–Menai Bridge and its surrounding area, no such living and working patterns exist to the same extent between Gwynedd and Ceredigion or Carmarthenshire.

The area is also home to the highest proportion of Welsh speakers in the country. Just over 50% of the population speak Welsh and the area is home to just over 40% of all Welsh speakers in Wales. Given its characteristics, the area is therefore suitable for trialling economic interventions which have linguistic aims.

4.1.1 Profile of the Arfor area

Arfor's economic area

A baseline analysis of the economic area of Arfor has identified the following:

1. On the whole, Arfor has witnessed positive growth, particularly before the last recession (2008/9). Although this would have varied across the four local authorities, in general there were strong performances across some of the key socioeconomic indicators.
2. Since the recession, there has been some divergence in economic performance in comparison with the rest of Wales, which will have implications for the Arfor area in the future.
3. GVA growth had been higher than the Welsh average up until the recession, but since then it has weakened and the outlook suggests that it is an area in which growth is expected to be lower than the Welsh average over the next 10 years. This weakness is

evident across a number of other key indicators such as GVA per head, gross household income, and population.

Although the labour market in the area has remained similar to national patterns over recent years, the outlook suggests that it would perform worse than the Welsh average and be likely to continue to do so.

Population and migration

4. Population growth is expected to slow down over time, possibly as a result of the last recession, wherein there was a break with statistical trends that had previously followed the Welsh average. Some of this slowing-down in population growth could also be associated with net negative migration, particularly among individuals aged 20–30.
5. Young people are leaving the Arfor area. The majority move to England, but large numbers also move to other parts of Wales. There is some migration between local authorities in the Arfor area and some migration from the rest of Wales to the Arfor area. Almost as many people migrate to the Arfor area as leave, most likely to study in the universities, but around half are in the older age bracket, aged above 30.
6. There is not much data with which to explain these patterns, aside from the few articles that were discussed above. There is a particular paucity of research in relation to the migration of individuals above the age of 30 to the Arfor area.

Young people are leaving the Arfor area. This is one of the structural weaknesses of the area's economy. The loss of young and economically active people means a loss of Welsh speakers, too. However, there is very little data available to explain these individuals' motives. Alongside this out-migration, consideration must be given to the similar numbers who come into the area. There is no understanding of the motives of migrants in the 25–44 age group who move to the area. What is more, there is no data on the language profile of those individuals who move to the area.

Labour market and the nature of the economy

7. The labour market in this area continues to perform relatively successfully. Employment, unemployment, skills/qualifications, and economic inactivity have generally performed at around the Welsh average (if not above) since the recession of 2008.
8. The qualification levels of individuals in the Arfor area are increasing, although they are somewhat behind the Welsh average. However, there is a notable exception among individuals who gain a level 4 or higher qualification in the area, which is up to five times the Welsh average. These individuals are very likely to be associated with the universities. Further data and research are needed in order to analyse the effect or possible effect of these individuals on the economy in the future, or the gap between this skilled workforce and the local labour market.

9. The location quotient (LQ)³⁷ analysis further highlights the structural weakness in the area's economy. These deficiencies are evident when comparing the LQ with Wales, but they would be much more evident in comparison with the rest of the UK. Key strengths in agriculture, tourism and the public sector are all evident in the analysis. Despite this, sectors such as agriculture, and possibly tourism, face challenges following the UK's departure from the EU or as a result of the effects of COVID-19.
10. In addition to these long-term challenges in sectors in which performance is strong, the analysis highlights a further structural weakness in the economy of the area. The sectors which have important growth and high-value characteristics are underrepresented in this part of Wales. This supports the projections made in relation to GVA. Structures tend to remain constant over the short and mid-term, enabling relatively positive projections, but the situation is more uncertain for the further future because sectors which add value grow more slowly in the Arfor area than in the remainder of Wales and the UK.

Since the labour market is comparable with the national average, but the data and wealth indicators are declining, it could be assumed that the value of the economy is weakening structurally in the area. The data suggests that the economy of the area has been skewed towards sectors which have a lower base value and weaker growth prospects. Moreover, these sectors (notably the agricultural sector) face specific challenges following the UK's departure from the EU and as a result of COVID-19. The sectors which are associated with key growth and higher value are less evident in the area. The fewer employment opportunities in the high-value growth sectors are a characteristic of the economy in the Arfor area.

The Welsh language

11. Although there are significant pockets, the proportion of the population who can understand (and can speak) Welsh across the area is much lower than the threshold of 70–80%, which is required for the linguistic sustainability of an area.
12. There is no strong statistical evidence that there is a positive relationship between economic growth and growth in the sustainability of the language.³⁸ Indeed, the analysis presented above suggests that the relationship is a negative one in some areas. More data and research could improve the understanding of the link between economic trends and the language or give a clearer understanding of the aspects or economic processes which have a negative impact on the Welsh language and which have a positive impact.
13. There is a lack of employment opportunities in the high-value growth sectors, but there is no data suggesting that this is or is not a factor that encourages young people to leave the area.

³⁷ The location quotient (LQ) compares one region with another region, or with a larger region (in this instance, the Arfor area with Wales). The comparison gives a picture of the 'size' of the sector as part of the economy in comparison with the wider average (in this instance, Wales).

³⁸ The limitations of the data and, therefore, the analysis must be noted here, too.

The number of Welsh speakers in the Arfor area has dropped below the threshold required for sustainability in many localities, which in itself justifies the rationale for interventions to improve the situation. However, there is insufficient evidence and data to draw clear conclusions regarding the link between the economy and the language. Furthermore, there is no data on the types of developments, the trends or the economic interventions which have an effect on linguistic patterns, be it negatively or positively. Although young people are leaving the area, there is not much evidence linking such migration with the (slightly) fewer job opportunities in high-value growth sectors in the area. Data supporting the argument that focusing on creating high-quality jobs for young people will encourage them to remain in the area is therefore weak.

5 Interim Conclusions and Initial Recommendations

5.1 Interim Conclusions

Nature of the problem and the rationale

The rationale underpinning the Arfor concept is that young people leave in order to find better employment. The logical conclusion is that the most effective response would be to create more and better jobs in the Arfor area so that young people will choose to remain in the area. The data shows that young people leave the Arfor area in their thousands every year, mainly to England but also to other parts of Wales, including other areas within the Arfor area. However, similar numbers of young people are coming into the area, though these are likely to remain only for short periods of time, studying at the universities.

Although the labour market in the area has remained aligned with national patterns over recent years, the outlook suggests that out-migration is one of the structural weaknesses of the area's economy, which is likely to mean that it will become weaker in the future. In addition to the migration, the economy of the area has been skewed towards the sectors associated with a lower base value and weaker growth prospects. It can be presumed that there will be fewer jobs with higher wages as a result of this.

Data supports the basic hypothesis, therefore, that migration is one of the main economic-linguistic challenges within the area. However, wider research challenges the detail of this hypothesis and, consequently, the responses which have been proposed thus far.

There is very little evidence, for example, supporting the hypothesis that young people leave the Arfor area for merely employment reasons. Indeed, contrasting evidence exists which suggests that the reasons as to why young people leave are mixed and complex. What is more, there is little data supporting the notion that young people would stay if more or better jobs were available locally.

Key stakeholders of the programme question the aim of keeping young people in the area, which is, in essence, an attempt to control and influence internal migration patterns. Some propose that the programme should focus instead on trying to encourage individuals to return to the area at a later stage in their lives.

Moreover, evidence supporting the hypothesis that there is a positive relationship between economic development and the language in every case is weak, i.e. that creating jobs supports the language (by keeping young people from leaving). Indeed, the analysis above suggests that there is a negative relationship between the economy and the language at times and that language indicators weaken as the economy, and employment, grows in some areas. Furthermore, data hints towards a negative relationship between specific sectors (public sector) of the economy and the Welsh language, or no relationship at all (agriculture), while a positive relationship with the Welsh language in other sectors (tourism) must be understood

in the context of the harmful long-term impact. Compounding matters further, there is no clear definition of 'better jobs', nor is there evidence suggesting what types of 'better jobs' would encourage young people and Welsh speakers to remain within or return to the area.

Finally, the range of interventions and support which have been available up to now have not had the desired effect on the situation. It is difficult to see how interventions similar to those which have been implemented over the past decades will affect the situation in a different way.

The data analysed in this document suggests that the problem at the heart of the programme is more complex than is presented within the rationale of the programme. There is a need for a better understanding of this problem before moving towards solutions with confidence and evidence.

The need to develop understanding

Despite the evidence supporting the hypothesis that migration is at the heart of the 'problem', there is a lack of evidence entirely supporting the suggestion that creating more and better jobs will resolve the issue. There is scope to further develop our understanding of the problem. Key research questions such as the following may support this process:

- Who is migrating from the area and to the area (i.e. a more detailed profile of out-migrants)?
- What motivates people to move out of the Arfor area?
- What motivates people to move to the Arfor area or back to the area?
- What type of action would, as a result, lead to less out-migration and encourage in-migration which is beneficial to the language?
- What type of job attracts people to remain within or return to a rural area?
- What impact does economic activity have on the number of speakers and on language use and acquisition?

Further questions arise as a result of examining the issues above, namely:

- Should policy focus on preventing young people from leaving the area or on attracting people back/to the area?
- Should the focus be on developing specific sectors of the economy or avoiding interventions in some sectors?
- Would purely economic support and interventions have the best effect? Or would there be more benefit and impact as a result of wider interventions which aim to improve the quality of life?
- What impact do wider factors have on the language, specifically issues relating to globalisation; the expansion of labour markets; deficiencies regarding social or leisure facilities; deficiencies in transport, housing or digital infrastructure; and the Welsh language?

Having answered these questions, it would be possible to gain a better understanding of the 'problem', and recommendations for interventions which are most likely to have the required effect can be made with more confidence.

Defining Arfor's aims and role

Due to the lack of evidence and data, there is no sufficient basis on which to develop a strategy or specific and long-term work programme for interventions to be supported and promoted by Arfor.

There is, however, an opportunity to redefine Arfor's aims and role for the future — in the opinion of many stakeholders, there is a need for this. Three possible avenues were highlighted during the discussions with the stakeholders:

1. There was considerable consensus in favour of using Arfor's capacity to trial innovative interventions as well as evaluating them. Arfor has an opportunity to start a systematic process of trialling, evaluating and developing grassroots interventions with businesses and to explore their impact on the economy and the language. Furthermore, this process is an opportunity to develop an understanding of the types of interventions and processes which are detrimental to the Welsh language.

There is no reason in principle to confine the evaluative work to Arfor-funded projects. Evaluating wider interventions and processes provides a means of developing insight and understanding without the cost of trialling and piloting from scratch. Indeed, some economic processes and interventions are likely to have a more far-reaching and more notable impact on the language than those of pilot programmes. For example, the 'Yr Egin' development in Carmarthen, the city regions or the Mid Wales Growth Deal, and even the expansion of Welsh-medium nurseries and of childcare provision are all likely to have impacts on the language that offer opportunities for insight and learning.

2. The four local authorities that are part of Arfor share similar characteristics, as well as economic and linguistic challenges. The evidence and research suggest that there is a basis for the Arfor councils to work together and develop responses to the common economic and linguistic challenges which they face. In doing so, there will be a greater desire and opportunity for these authorities to share good practice and mainstream successful interventions internally.
3. There is also an opportunity to take advantage of Arfor's status in strengthening the influence of the four local authorities to promote good practice and influence external economic strategies and policies. A long-term aim could be to try to mainstream interventions and good practice more widely than merely within the Arfor area, as well as to emphasise the need to support the language through economic planning.

The need to develop insight and understanding overlaps with each of these options. Collecting, analysing and evaluating data and building on the knowledge which is acquired over time will make it possible to develop these three avenues. Improved data and effective evaluation support efforts to develop innovative interventions, building a foundation for joint action within the Arfor area, and the process of collecting, evaluating and analysing supports efforts to make representations and influence externally. The process of coordinating and managing the development of this understanding is one which should be given constant and continued attention.

5.2 Initial Recommendations

The data and evidence which are available highlight the programmes or interventions which are certain to have a positive effect on the economy and the language. The challenge of understanding the effect of economic interventions and processes on the language remains. Despite this, actions can be recommended which would start the process of developing that understanding and would identify the types of interventions which are likely to have a positive effect on the language.

These recommendations suggest possible avenues for the short term as well as over a longer time period. The aim of this section, therefore, is to present recommendations which will enable Arfor to reach the point at which grassroots interventions **which have a positive effect on the Welsh language** can be identified and promoted.³⁹

Short-term recommendations

Recommendation 1: Ensuring an Effect

Aim: To ensure that innovative interventions are trialled *and* evaluated.

Short term: Innovative economic interventions should continue to be commissioned and piloted with the aim of ensuring a positive impact on the Welsh language. Consideration should be given to trying to identify wider funding sources, outside of the Arfor grant, in order to ensure that these activities continue. The expertise of the 'Research Group' (Recommendation 2) should be drawn upon when trying to identify sources in addition to developing criteria for this piloting work.

As a result, Arfor (and the Research Group in particular) will collect a bank or database of plans and interventions which have a positive effect on the Welsh language. Arfor's current projects could be considered a starting point for this process of collecting the database. Thorough evaluations of the effect of these projects are a key step in the success and influence of the good practice database.

³⁹ A 'positive effect' could be defined as a contribution towards increasing the number of speakers and/or the use, sustainability or status of the Welsh language in the area. However, there is scope to develop this definition further as a result of the understanding which will be developed.

Recommendation 2: Establish a Research Group

Developing an understanding of the economic factors and variables which have a positive or detrimental effect on the number of speakers and the linguistic vitality is a vital step before developing grassroots and strategic interventions. Consideration should be given to establishing a '**Research Group**' or observatory to manage the database and research on the relationship between the economy and the language. What is more, consideration should be given to widening the membership of this group, such as to researchers, academics and practitioners in the field of the economy and the language. However, consideration should also be given to drawing on the expertise of individuals from alternative backgrounds, as well as to creating opportunities for new voices and ideas in the field.

The panel should evaluate innovative projects which are associated with Arfor. Wherever possible, however, an attempt should be made to identify suitable funds and funding sources so as to trigger further pilot and innovative programmes in the field, and to commission further research work outside of the Arfor area, but which are likely to have an effect on the economy and language in the area. The panel should be regarded as a forum which will introduce information and recommendations to Arfor, promoting opportunities and interventions to be mainstreamed.

Short-term aim: By evaluating grassroots projects, the Arfor Board will develop an understanding of the link between the economy and the language, and of the types of interventions which have a positive or negative effect on language vitality. Consideration should be given to a range of duties, such as:

- Evaluating grassroots projects⁴⁰
- Reviewing the wider evidence and research on economy>language issues
- Reviewing past projects (e.g. Llwybro)
- Commissioning research where possible, and collecting wider data
- Developing methodology with which to evaluate the effect of economic processes on the language
- Identifying strategic opportunities to successfully influence and mainstream within the Arfor area and farther afield.

Long-term aim: Over time, the aim should be to develop the Research Group as a source of good practice and effective interventions in the field of economy>language. What is more, it should have a role as an advisory group which proposes recommendations to Arfor authorities regarding interventions to be mainstreamed or to be promoted more widely.

Consideration should be given to developing the understanding of the problem and of the factors which are detrimental to the Welsh language. In addition to the challenge of young people migrating, there is scope to examine weaknesses in the economy, infrastructure, and labour markets in the area. Furthermore, consideration should be given to the need to consider ways of responding to the effect of economic globalisation on the use of minority

⁴⁰ Arfor's current programmes will be evaluated as part of the project, but it is proposed that consideration be given to evaluating projects, programmes, developments and economic interventions which are wider than Arfor.

languages, as well as examining the need to align with linguistic, educational and social policies.

Long-term recommendations

Recommendation 3: Develop and Ensure a Strategic Impact

Aim: Consideration should be given to formalising Arfor's structures in the long term in order to achieve the aims of the programme. The aim of formalising the structures would be to:

- 1) Share experiences, good practice, understanding, data, and information within the Arfor area.
- 2) Identify and develop the ability of the four counties to take advantage of opportunities to influence externally.

Consideration should be given to using the Research Group as a source of information, evaluative data, and expertise, which, in turn, would enable the four counties to influence policies and strategies in the Arfor area and farther afield in order to mainstream successful interventions. The long-term formal structure of Arfor could consider:

- Targeting amendments to strategies and linguistic or economic interventions; rural development; and the individual authorities corporately.
- Developing a regional approach to the economic-linguistic challenges where appropriate.
- Identifying and promoting possible cross-county investments and developments which are likely to have a positive effect on the economy and the language.

Long term: In the long term, empowered by a greater understanding of the link between economic development and the language, the Arfor area will be better placed to consult with and influence external bodies and wider economic and linguistic strategies. The Arfor area can weigh up the need to develop the cause for further funding in the future in order to trial programmes and innovative or experimental plans. In the future, Arfor could target:

- Welsh Government linguistic and economic strategies
- Preparations and plans for the programme which will follow the RDP
- Regional Skills Partnerships and training and education suppliers
- Swansea Bay City region and the Mid Wales Growth Deal
- Modifications and developments to the National Development Framework
- Attracting more money to develop and continue with Arfor's work.

Wider recommendations

Recommendation 4: The Effect of COVID-19 on Arfor Spending

Given the impact of the COVID-19 crisis on spending and the spending ability of grant recipients of the current Arfor programme, there is a danger that there will be an underspend during the period of the programme's implementation. In this instance, consideration should be given to commissioning evaluations or further research work in order to develop the understanding relating to the key questions which were identified at the beginning of this chapter. It could be possible to take advantage of the opportunity, for example, to learn about young people's reasons for leaving the Arfor area or returning to it, to evaluate wider economic developments such as the linguistic impact of Yr Egin, or to examine the recent anecdotal growth in the number of young people who are returning to the Caernarfon area.

wavehill™

social and economic research
ymchwil cymdeithasol ac economaidd

01545 571711

wavehill@wavehill.com

wavehill.com

