



y ganolfan cynllunio iaith
welsh centre for language planning

Welsh Language Evidence Update: April 2024

Carmarthenshire County Council

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Welsh Language Evidence Update

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Introduction

1. This report reviews the evidence provided in the Welsh Language Impact Assessment (WLIA) of the 2nd Deposit revised Local Development Plan (rLDP2). This WLIA was prepared prior to the publication of the 2021 Census of population data pertaining to the Welsh language. The WLIA (henceforth 'updated WLIA') was an updated version of WLIA of the draft deposit rLDP 1 produced in 2019. This report takes on board the detailed results of the 2021 Census of Population published in December 2022.
2. The brief asks us to provide the following:
 - an overview of the Census Data in so far as it is relevant to the WLIA and if and whether the data might affect its findings;
 - identify if there is any data missing from the information published to date, particularly in relation to migration data and where possible use alternative information sources or assumptions;
 - consider if the additional data affects the WLIA findings and how the assessment might differ; and
 - discuss any implications on the policy approach, particularly in relation to the identification of the whole county as an area of linguistic sensitivity.

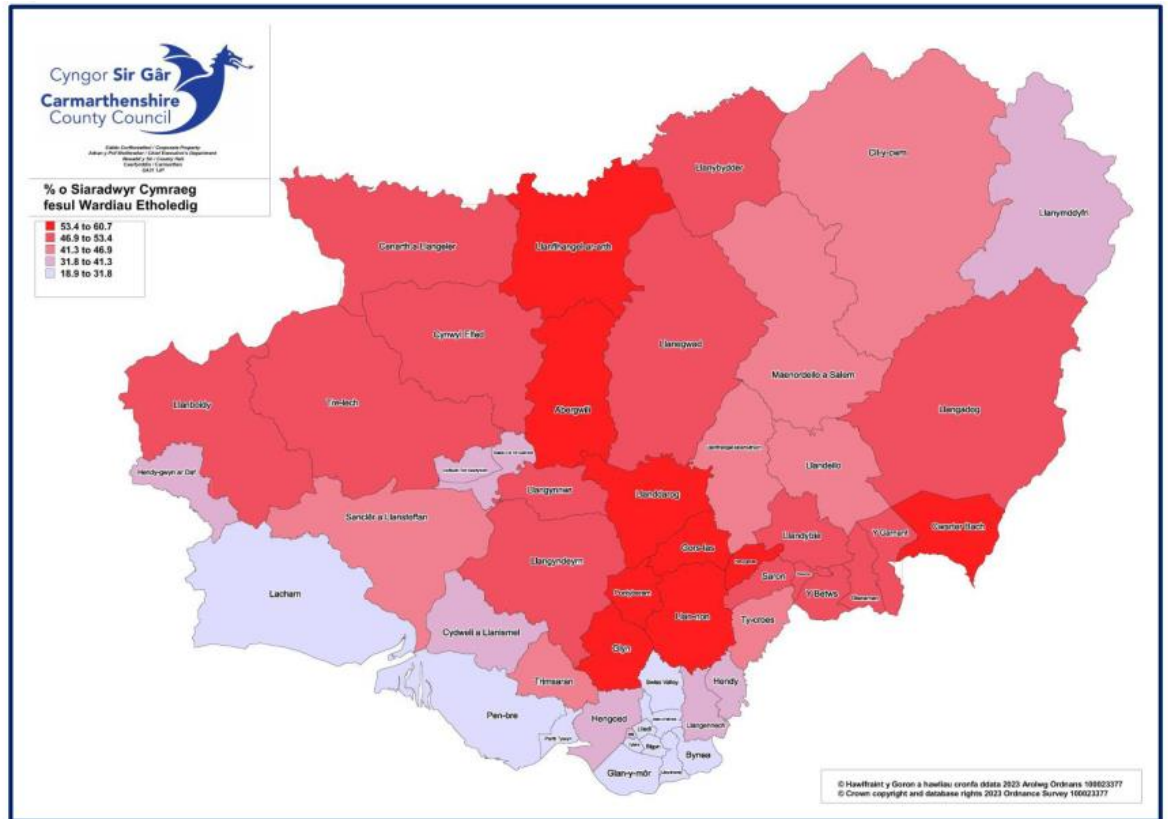
Overview of Relevant Census Data

3. The detailed results of the 2021 Census of population were published on 6 December 2022 shortly after the WLIA of the Second Deposit Revised LDP was completed. The census required adults to self-assess their own language skills, or the skills of others such as children as to whether they could understand Welsh, and speak, read, or write Welsh. People could select a single skill, multiple skills, or no Welsh skills.
4. The main headlines for Carmarthenshire from the published 2021 data are as follows:
 - 72,838 usual residents aged 3 and over reported that they are able to speak Welsh. This is 39.8% of the county's population aged three and over. This represents a decrease of 5,210 people aged three and over since the 2011 Census and a percentage point decrease of 4.0.

- A further 20,036 (just under 11%) residents aged 3 and over can “understand spoken Welsh only”.
- A total of 85,287 residents aged 3 and over have no skills in Welsh which represents a 4.8% increase since 2011.
- Whilst most wards saw a decrease in numbers able to speak Welsh, the following wards saw slight increases:
 - Betws
 - Glan y Môr
 - Gorslas
 - Hengoed
 - Llanddarog
 - Llangynnwr
 - Llangyndeyrn
 - San Clêr.
- At Electoral Ward level, the percentage of residents able to speak Welsh varies between 18.9% for Tyisha to 60.7% for Pontyberem.
- There are 14 electoral wards (out of 51) which have over 50% of their usual resident aged three and over able to speak Welsh. The higher density wards are concentrated in the Aman and Upper Gwendraeth Valleys and the more northerly rural areas of Abergwili and Llanfihangel ar Arth.
- There are 13 wards that have less than a third of their usual residents able to speak Welsh. The lower-density wards are concentrated in Llanelli, the southern coast of Penbre and Talacharn and Llanymdyfri.
- Parents/ guardians recorded that there has been a decrease of 500 children and young people aged 3 – 15 able to speak Welsh over the corresponding figure for 2011. All age groups over 50 years of age recorded a significant decrease in those able to speak Welsh with the largest reduction occurring in the 65 to 74 age group.

Figure 1 reproduces internal analysis prepared by Carmarthenshire County Council showing the percentage of Welsh speakers at Electoral Ward level

Figure 1: 2021 Census of Population Carmarthenshire Density of Welsh speakers (Ward level)



Source: Carmarthenshire County Council (April 2024)

- Due to electoral ward boundary changes it is not possible to compare changes in the number of Welsh speakers between the 2011 Census and the 2021 Census at Ward level.

Table 1 reproduces internal analysis prepared by Carmarthenshire County Council showing the percentage change in the density of Welsh speakers at LSOA level between 2011 and 2021.

Table 1: Changes to the Percentage of Welsh Speakers at LSOA level

% Siaradwyr Cymraeg wrth Ardaloedd Cynnyrch Ehangach Haen Is (LSOAs)														
Enw'r ardal		2011	2021	% newid	Enw'r ardal		2011	2021	% newid	Enw'r ardal		2011	2021	% newid
Glanaman 1		59.4	47.6	-11.8	Cilycwm		46.0	41.9	-4.1	Cilycwm		46.0	41.9	-4.1
Glanaman 2		60.1	48.6	-11.5	Glanymor 2		22.1	18.0	-4.1	Glanymor 2		22.1	18.0	-4.1
Llanbydder 2		61.6	50.7	-10.9	Llansteffan		44.2	40.1	-4.1	Llansteffan		44.2	40.1	-4.1
Llangyndeyrn 1		56.4	45.6	-10.8	Gorllewin Tref Caerfyrddin		41.1	37.1	-4.0	Gorllewin Tref Caerfyrddin		41.1	37.1	-4.0
Cwarter Bach 1		71.8	62.2	-9.6	Llanismel 1		56.8	52.8	-4.0	Llanismel 1		56.8	52.8	-4.0
Cwarter Bach 2		65.8	56.8	-9.0	Llanbydder 1		56.4	52.4	-4.0	Llanbydder 1		56.4	52.4	-4.0
Llannon 1		67.8	59.0	-8.8	Pembre 2		26.8	22.9	-3.9	Pembre 2		26.8	22.9	-3.9
Pontyberem 2		68.8	60.0	-8.8	Gogledd Tref Caerfyrddin 3		37.9	34.0	-3.9	Gogledd Tref Caerfyrddin 3		37.9	34.0	-3.9
Llanegwad 2		44.6	36.0	-8.6	Penygroes 1		59.1	55.3	-3.8	Penygroes 1		59.1	55.3	-3.8
Llangadog		55.7	47.2	-8.5	Llanismel 2		41.0	37.4	-3.6	Llanismel 2		41.0	37.4	-3.6
Trelech		53.5	45.0	-8.5	De Tref Caerfyrddin 2		41.4	37.9	-3.5	De Tref Caerfyrddin 2		41.4	37.9	-3.5
Llannon 2		68.6	60.5	-8.1	Rhydaman 2		51.0	47.5	-3.5	Rhydaman 2		51.0	47.5	-3.5
Penygroes 2		65.6	57.5	-8.1	Bigyn 3		25.1	21.7	-3.4	Bigyn 3		25.1	21.7	-3.4
Saron 1		54.1	46.1	-8.0	Llanymddyfri 2		42.0	38.6	-3.4	Llanymddyfri 2		42.0	38.6	-3.4
Garnant		58.5	50.7	-7.8	Swiss Valley		33.1	29.8	-3.3	Swiss Valley		33.1	29.8	-3.3
Llangeler 1		55.1	47.4	-7.7	Cynwyl Gaeo		46.7	43.4	-3.3	Cynwyl Gaeo		46.7	43.4	-3.3
Cydweli 2		45.3	37.7	-7.6	Lliedi 1		25.5	22.2	-3.3	Lliedi 1		25.5	22.2	-3.3
Hendy 2		44.5	37.4	-7.1	Betws		53.4	50.1	-3.3	Betws		53.4	50.1	-3.3
Sanclêr 2		54.7	47.7	-7.0	Llwynhendy 1		25.7	22.5	-3.2	Llwynhendy 1		25.7	22.5	-3.2
Llangyndeyrn 2		61.1	54.3	-6.8	Cenarth		48.8	45.6	-3.2	Cenarth		48.8	45.6	-3.2
Llwynhendy 2		29.6	22.8	-6.8	Gogledd Tref Caerfyrddin 4		47.9	44.9	-3.0	Gogledd Tref Caerfyrddin 4		47.9	44.9	-3.0
Bynea 2		31.1	24.7	-6.4	Manordeilo and Salem		48.2	45.2	-3.0	Manordeilo and Salem		48.2	45.2	-3.0
Llandybie 1		57.1	50.7	-6.4	Llangynnwr 1		50.5	47.6	-2.9	Llangynnwr 1		50.5	47.6	-2.9
Gorslas 1		67.2	61.1	-6.1	Porth Tywyn 3		35.1	32.4	-2.7	Porth Tywyn 3		35.1	32.4	-2.7
Saron 2		54.7	48.6	-6.1	Llwynhendy 3		22.8	20.1	-2.7	Llwynhendy 3		22.8	20.1	-2.7
Llangennech 2		37.6	31.6	-6.0	Llanegwad 1		60.4	57.7	-2.7	Llanegwad 1		60.4	57.7	-2.7
Llangeler 2		53.8	48.0	-5.8	Felinfoel		28.1	25.5	-2.6	Felinfoel		28.1	25.5	-2.6
Trimsaran 2		45.7	40.0	-5.7	Llanymddyfri 1		38.8	36.2	-2.6	Llanymddyfri 1		38.8	36.2	-2.6
Llanfihangel Aberbythych		51.6	46.0	-5.6	Lliedi 2		35.4	33.0	-2.4	Lliedi 2		35.4	33.0	-2.4
Tyisha 2		22.9	17.3	-5.6	Llanfihangel-ar-Arth 2		58.2	56.1	-2.1	Llanfihangel-ar-Arth 2		58.2	56.1	-2.1
Cydweli 1		43.3	37.8	-5.5	Porth Tywyn 1		32.7	30.6	-2.1	Porth Tywyn 1		32.7	30.6	-2.1
Cynwyl Elfed 2		56.0	50.5	-5.5	Llanddarog		57.8	55.7	-2.1	Llanddarog		57.8	55.7	-2.1
Gorllewin Tref Caerfyrddin 1		31.6	26.1	-5.5	Hengoed 2		32.9	30.9	-2.0	Hengoed 2		32.9	30.9	-2.0
Llanfihangel-ar-Arth 1		56.8	51.3	-5.5	Llangennech 1		43.5	41.6	-1.9	Llangennech 1		43.5	41.6	-1.9
Hendy-gwyn ar Daf		42.4	37.0	-5.4	Porth Tywyn 2		28.9	27.0	-1.9	Porth Tywyn 2		28.9	27.0	-1.9
Llandeilo 2		48.1	42.7	-5.4	Gogledd Tref Caerfyrddin 1		34.1	32.3	-1.8	Gogledd Tref Caerfyrddin 1		34.1	32.3	-1.8
Trimsaran 1		55.2	50.0	-5.2	Llanboidy		48.7	47.4	-1.3	Llanboidy		48.7	47.4	-1.3
Hendy 1		43.2	38.1	-5.1	Llangennech 3		38.4	37.2	-1.2	Llangennech 3		38.4	37.2	-1.2
Llacharn 1		24.2	19.2	-5.0	Ellis 2		24.7	23.6	-1.1	Ellis 2		24.7	23.6	-1.1
Llandeilo 1		52.4	47.4	-5.0	Bigyn 1		26.1	25.1	-1.0	Bigyn 1		26.1	25.1	-1.0
Tygroes		47.1	42.1	-5.0	Glanymor 1		18.8	17.8	-1.0	Glanymor 1		18.8	17.8	-1.0
Gogledd Tref Caerfyrddin 2		30.4	25.5	-4.9	Lliedi 3		24.6	23.6	-1.0	Lliedi 3		24.6	23.6	-1.0
Pontamman 1		50.6	45.8	-4.8	Dafen 1		28.3	27.4	-0.9	Dafen 1		28.3	27.4	-0.9
Glyn		58.9	54.1	-4.8	Abergwili		55.7	55.1	-0.6	Abergwili		55.7	55.1	-0.6
De Tref Caerfyrddin 1		35.5	30.8	-4.7	Pembre 1		34.9	34.3	-0.6	Pembre 1		34.9	34.3	-0.6
Llandybie 2		56.9	52.2	-4.7	Bigyn 4		15.6	15.0	-0.6	Bigyn 4		15.6	15.0	-0.6
Llannon 3		54.4	49.7	-4.7	Tyisha 1		19.4	19.2	-0.2	Tyisha 1		19.4	19.2	-0.2
Dafen 2		25.8	21.2	-4.6	Gorllewin Tref Caerfyrddin		38.8	38.8	0.0	Gorllewin Tref Caerfyrddin		38.8	38.8	0.0
Tyisha 3		22.3	17.7	-4.6	Hengoed		32.5	32.7	0.2	Hengoed		32.5	32.7	0.2
Gorslas 2		60.2	55.8	-4.4	Glanymor 4		16.6	16.9	0.3	Glanymor 4		16.6	16.9	0.3
Cynwyl Elfed 1		52.6	48.2	-4.4	Sanclêr 1		46.6	46.9	0.3	Sanclêr 1		46.6	46.9	0.3
Pontyberem 1		65.8	61.4	-4.4	Ellis 1		33.2	33.6	0.4	Ellis 1		33.2	33.6	0.4
Rhydaman 1		48.6	44.2	-4.4	Llacharn 2		20.1	21.3	1.2	Llacharn 2		20.1	21.3	1.2
Pontamman 2		55.7	51.5	-4.2	Llangynnwr 2		45.9	48.4	2.5	Llangynnwr 2		45.9	48.4	2.5
Bigyn 2		25.8	21.6	-4.2	Glanymor 3		18.7	23.4	4.7	Glanymor 3		18.7	23.4	4.7

Source: Carmarthenshire County Council (April 2024)

- The remainder of this report considers the implications of the 2021 Census data for the WLIA of the Deposit rLDP2.

Summary of the Presumed Scenario for the Deposit rLDP2 WLIA

- The Draft Deposit rLDP2 WLIA (updated WLIA) is predicated on the ISA Framework. This provides the context for decision-making in relation to the rLDP2 with the key issue for

decision makers being “*Will the rLDP encourage the growth of the Welsh language and culture?*”

8. In our updated WLIA (2022) we concurred with the view expressed in the Integrated Sustainability Appraisal (ISA) that there is a **realistic possibility** (our emphasis) that the number and percentage of persons aged 3 and over who can speak Welsh in the county had grown since 2011. **Table 2** reproduces Table 2.4 from the report and shows the ability to speak Welsh in Carmarthenshire extracted from the relevant tables of the Annual Population Survey (APS) on Stats Cymru.

Table 2: Updated WLIA (2022) Table 2.4: Annual Population Survey – Carmarthenshire change in Welsh Language ability over time

Date of Survey	All aged 3 and over	Yes, can speak Welsh	Percentage	Change (%) 2011-2018	Change (%) 2018 – 2022
March 2011	174,600	81,500	46.7		
March 2018	177,200	90,700	51.2	9.6	
March 2022	176,200	95,200	54.0		5.4

Source: Stats Cymru Annual Population Census – Welsh Language ability

9. We caveated this view by noting that the APS results are sample-based, survey estimates and therefore, subject to variability within confidence levels, particularly at local authority level. The APS estimates of Welsh language ability are historically higher than those produced by the Census.
10. As the LDP preparation process progresses, the ISA that accompanies the draft LDP is designed to be revisited and reviewed. An Addendum to the ISA was published for consultation in February 2024 which includes proposed focussed changes to the ISA as a result of the consideration of previous representations and other officer-led amendments. The focused changes include reference and consideration of the results of the 2021 Census of population statistics relating to the Welsh language in Carmarthenshire. As a result, Appendix 1 which includes a list of proposed focused changes includes proposing to amend Table 5 the baseline for ISA11 the Welsh Language from “improving” to “declining”.
11. The view of the updated WLIA at the time that there is a “realistic possibility” of growth was supported by the evidence provided in the Council’s Welsh in Education Strategic Plan 2022 – 2032. The ambition in Carmarthenshire’s Welsh in Education Strategic Plan

(WESP) is that 75% of all Year 1 pupils will receive their education through the medium of Welsh by 2033. This is based upon a target of 75% for nursery-aged pupils (3-4 yrs old) and 78.5% of reception-aged pupils (4-5 yrs old) receiving their education through the medium of Welsh by 2033. By the end of the Plan period, therefore, the ambition is that there would be 698 more pupils per year receiving their education through the medium of Welsh than the baseline figure for 2021, building upon the increase of 4.5 percentage points (around 85 additional pupils) achieved between 2018 and 2021. By 2033, because most pupils will have gone through the Carmarthenshire education system, the updated WLIA (2022) estimated that it is likely that the proportion of Welsh speakers aged 3-15 is highly likely to be at least 75%.

12. In the updated WLIA (2022), we reported that the projected number of pupils aged 3-15 for Carmarthenshire by 2033 is estimated to be 26,158. Should the target of 75% be achieved, this suggests that there is a realistic possibility that 26,158 ($\times 75\% = 19,618$) pupils may be able to speak Welsh by the end of the plan period. This represents a gross increase of 4,104 ($19,618 - 15,414$) over the figure recorded in the 2011 Census.
13. In the updated WLIA (2022), the assumption made for the baseline trajectory (the WG Trajectory) is that by 2031, 55% of pupils aged 15 will be able to speak Welsh. For Carmarthenshire this would represent ($26,158 \times 55\% = 14,387$). The difference represents a gross increase of $19,618 - 14,387 = 5,231$.

Residents aged 3 – 15

14. The annual collection of PLASC (Pupil Level Annual School Census) data recorded each January does allow us to monitor and update the position in relation to pupils aged 5 – 15 and their ability in Welsh, as reported by their parents. While this data needs to be treated with caution regarding its reliability, it does provide an indication of parents' perceived levels of their children's fluency in Welsh. **Table 3** (updated WLIA (2022) Table A2.4-4) summarises the position for Carmarthenshire pupils in January 2019 which corresponds closest to the Second Deposit LDP baseline.

Table 3: Updated WLIA (2022) Table A2.4-4: Pupils aged 5 – 15 with ability¹ in Welsh 2018/2019

Carmarthenshire PLASC data 2018/2019									
Age groups	Fluent in Welsh		Not fluent in Welsh		Cannot speak Welsh		Total	Ability (Fluent + Not Fluent)	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Count	Percentage
5 to 10	4,855	39.8%	3,330	27.3%	4,020	32.9%	12,205	8,185	67.1%
11 to 15	4,075	42.2%	3,190	33.1%	2,380	24.7%	9,645	7,265	75.3%
Totals	8,930	40.9%	6,520	29.8%	6,400	29.3%	21,850	15,450	70.7%

Source: Welsh Government PLASC Data January 2018/19²

15. Whilst it is difficult to compare usual residents aged 3 to 15 at the Census 2011 (all usual residents 26,733) with school rolls (pupils aged 5-15), the PLASC data presented in the updated WLIA (2022) (see **Table 3**) suggested that, against a declining school age population, the ability to speak Welsh had significantly increased from 57.6% (2011 Census data) to 70.7% (2018/19 PLASC data).
16. This trend was reinforced by the PLASC returns for 2021/22 presented which showed that 88.6% of primary pupils and 80.5% of secondary pupils were reported to be able to speak Welsh (**Table 4**). Although there has been a decline since 2021/22, the 2022/2023 PLASC data still indicates that 85% of primary pupils and 79.4 % of secondary pupils can speak Welsh as shown in **Table 5**.

¹ 'Ability to Speak Welsh' & 'Speaking Welsh at Home', as assessed by parents.

² ['Ability to Speak Welsh' & 'Speaking Welsh at Home', as assessed by parents, of pupils aged 5 and over in primary schools by local authority \(gov.wales\)](#) and ['Ability to Speak Welsh' & 'Speaking Welsh at Home', as assessed by parents, of pupils aged 11-15 in secondary schools by local authority \(gov.wales\)](#). The Ability score includes pupils 'fluent in Welsh' and 'not fluent in Welsh'. The data includes all pupils categorised by parents as "Not Applicable"

Table 4: Updated WLIA (2022) Table A2.4-5: Pupils aged 5 – 15 with ability³ in Welsh (PLASC 2021/2022 data)

Carmarthenshire PLASC data 2021/2022									
Age groups	Fluent in Welsh		Not fluent in Welsh		Cannot speak Welsh		Total	Ability (Fluent + Not Fluent)	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Count	Percentage
5 to 10	4,175	34.7%	6,485	53.9%	1,370	11.4%	12,030	10,660	88.6%
11 to 15	4,265	42.3%	3,845	38.2%	1,965	19.5%	10,075	8,110	80.5%
Totals	8,440	38.2%	10,330	46.7%	3,335	15.1%	22,105	18,770	84.9%

Source: Welsh Government PLASC Data 2021/2022

Table 5: Pupils aged 5 – 15 with ability⁴ in Welsh (PLASC 2022/2023 data)

Carmarthenshire PLASC data 2022/2023									
Age groups	Fluent in Welsh		Not fluent in Welsh		Cannot speak Welsh		Total	Ability (Fluent + Not Fluent)	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Count	Percentage
5 to 11	3,875	32.5%	6,270	52.5%	1,790	15.0%	11,935	10,145	85.0%
11 to 15	4,240	41.0%	3,980	38.5%	2,130	20.6%	10,350	8,220	79.4%
Totals	8,115	36.4%	10,250	46.0%	3,920	17.6%	22,285	18,365	82.4%

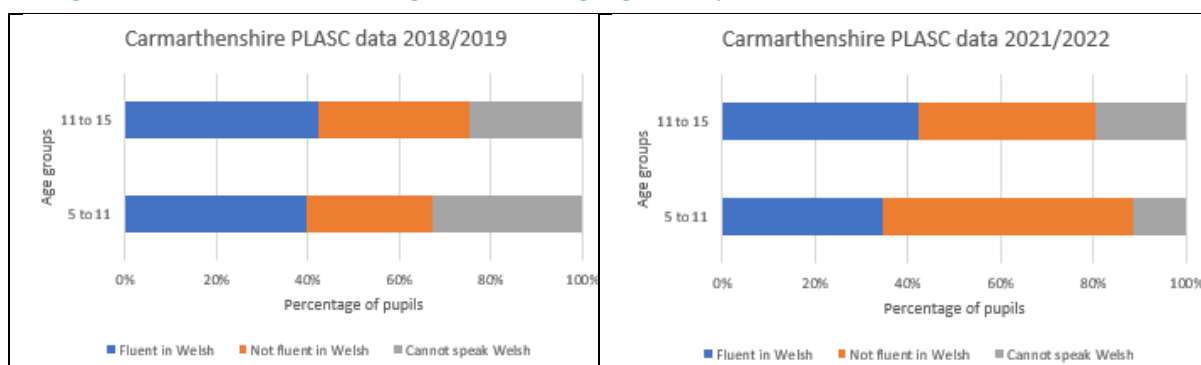
Source: Welsh Government PLASC Data 2022/2023

17. Overall, the number and proportion of pupils aged 5-15 who can't speak Welsh has fallen since 2018/19 as shown in **Figures 2 and 3**. However, the overall numbers of pupils aged 5 -15 who speak Welsh fluently are a cause for concern as this group has declined by 490 from 8,930 (40.0%) in 2018/19 to 8,440 (38.2%) in 2021/22 and 8,115 (36.4%) in 2022/23. Research indicates that children and young people who speak Welsh fluently and speak Welsh at home are likely to be those who use the language outside the classroom and may therefore reflect a decline in the resilience of the language in community use.
18. The ability and fluency of the cohort increases with age, from primary to secondary school age groups (**Figures 2 and 3**). This augurs well in terms of both a growth and spatial strategy that has as one of its main aims an ambition to retain more young people and grow the Welsh language.

³ 'Ability to Speak Welsh' & 'Speaking Welsh at Home', as assessed by parents.

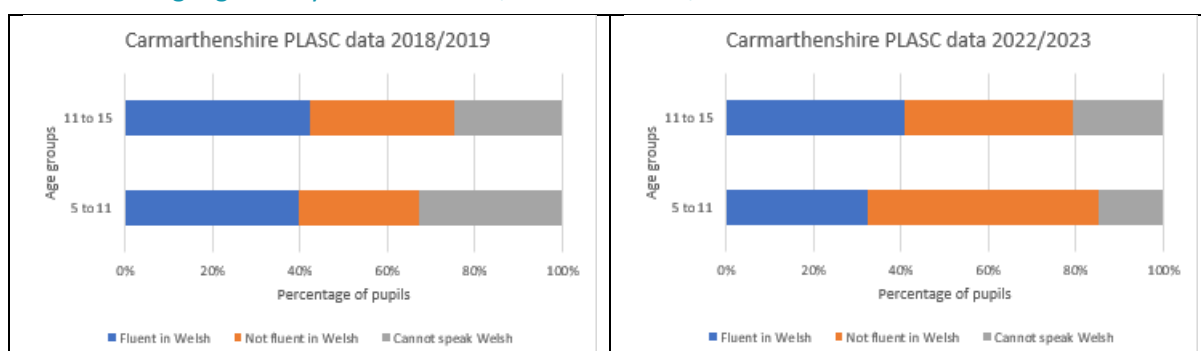
⁴ 'Ability to Speak Welsh' & 'Speaking Welsh at Home', as assessed by parents.

Figure 2: Updated WLIA (2022) Figure A 2.4-4: Change in percentage of Carmarthenshire pupils aged 5-11 and 11-15 according to Welsh language ability between 2018/2019 and 2021/2022



Source: Welsh Government PLASC data, January 2019 and 2022

Figure 3: Change in percentage of Carmarthenshire pupils aged 5-11 and 11-15 according to Welsh language ability between 2018/2019 and 2022/2023



Source: Welsh Government PLASC data, January 2019 and 2023

Review of Assumptions for the Preferred Growth Strategy

19. The Carmarthenshire revised Preferred Growth Strategy (PGS) adopts the Ten-Year Trend Based Projection based on Turley's Housing and Economic Growth report and a Council Tax Vacancy Rate of 3.8%.⁵ This projection forecasts the population aged 3 and over to be 202,036 by 2033 - a population projected increase of 14,468. This in turn leads to the Preferred Strategy's assumption of a housing requirement figure of 8,882 homes (average of +588 p.a.), and a jobs per annum requirement of 276⁶.

⁵ 2nd Revised Deposit LDP (February 2023), pars. 8.7

⁶ Based on Turley (October 2022) *Carmarthenshire Housing and Economic Growth Report*.

20. In summary, the WG Cymraeg 2050 trajectory for the growth of Welsh speakers is calculated using the WG 2014 principal population projection of 22.5%.⁷ Assuming the same assumptions for the growth of Welsh speakers in Carmarthenshire, we posited the following position in the updated WLIA (2022):

*“Applying the same change (22.5%) in the percentage of the population aged 3 and over who speak Welsh to the projected change in the overall percentage figure of Welsh speakers in Carmarthenshire would possibly lead to a growth in the number of Welsh speakers aged 3 and over to $(78,048 * 22.5\%) = 95,608$.*

Based on the WG14 Principal Variant assumption used in the WG’s analysis this would provide an estimated percentage of the population aged 3 and over able to speak Welsh as 52.0%. This compares to 43.9% recorded in the 2011 Census.”

21. The population projections for Wales have been updated since the publication of the Cymraeg 2050 Trajectory Report – the latest being the WG2018 projections. Assuming that the proportion of the population aged 3 and over would be similar to that of the baseline (97.24%), this would give a projected population aged 3 and over (by 2033) of 196,460. This would result in the proportion of the total Carmarthenshire population aged three and over who are able to speak Welsh as $(95,608 / 196,460) = 48.7\%$.

22. The effect of using the WG2018 Principal projection would be a 2.19% percentage point reduction in the proportion of Welsh speakers than would be realised under this trajectory scenario (50.8%) and a 3.3 percentage point reduction in the proportion of Welsh speakers than would be realised under the WG14 based population trajectory scenario (52.0%).

23. The Deposit rLDP2 adopts the 10-year Trend base Projection. We summarised our conclusions relating to adopting the Preferred 10YTBP Growth Scenario for the Welsh language baseline trajectory as:

“Based on assumptions about the characteristics of in-migrants from the 2011 Census, the net change in population scenario figures for 2022 10YTB projection over WG18 and the future success rate of Carmarthenshire’s Welsh Language Education Strategy, the numbers of Welsh speakers could possibly be higher than the WG Trajectory by:

⁷ The WG Cymraeg 2050 Trajectory is based on the 2014 Principal Variant.

Total number of Welsh speakers aged 3+ = 95,608 + 5231-3,194 + 439 = 98,084

Percentage of Welsh speakers aged 3+ = 98,084 divided by 196,460 = 49.9%

*This suggests a realistic possibility of a decrease of 0.9% percentage points over the WG18 Trajectory scenario (50.8%) and a **0.6% percentage point decrease** over the First Deposit rLDP Preferred Strategy (50.5%).*

24. In the updated WLIA (2022), we noted that *“55% of the increase is achieved through the WESP intervention rather than as a result of the Preferred Growth Option, although it is also reasonable to note that policy interventions designed to retain or increase the number of young people are likely to feed into a higher number of school pupils (and post 15 young persons) able to speak Welsh and thus boost the overall proportion”*.
25. We also noted that, based on the analysis of 2019/20 gross migration estimates, *“a high percentage of in-migrants is the result of re-locations from neighbouring counties and from elsewhere in Wales. Should this trend continue, we noted that “The percentage of households where at least one adult and a high proportion of dependent children are likely to be able to speak Welsh, will probably increase over time”*.
26. In addition to assessing magnitude of impact, the other key aspect of Risk Assessment is determining the likelihood of an event occurring. In the updated WLIA, we noted that the evidence supporting this magnitude of event occurring (i.e. 0.6% decrease) is dependant on a number of assumptions and is poorly understood. The key assumptions include past experience of the characteristics and changes found on the basis of the previous Plan being realised, particularly in terms of household formations, employment growth and housing land allocation take-up.
27. We concluded that, due to the evidence being undeveloped, the likelihood of the above scenario being realised is at present relatively weak.

The 2021 Census

28. The 2021 Census records the population of Carmarthenshire as 187,897 and it is estimated that of these, 182,551 are aged 3 and over.⁸ The 2021 Census records the number of Welsh speakers aged 3 and over as 72,838 - a reduction of 5,210 since 2011.

⁸ 1% of the county's population is estimated to live within the Bannau Brycheiniog National Park whilst 1.2% of the county's Welsh speakers were estimated to live within the same area.

29. This compares to the trajected figure of 83,325 used as part of the assumption for achieving 95,608 by 2033. The trajectory assumes that Carmarthenshire would maintain at the same level its proportion of Welsh speakers of the Welsh total within the same age cohort. **Table 6** compares the performance by age cohort.

Table 6: Impact of 2021 census data on trajected growth in number of Welsh speakers, according to age cohort

	2011 Census	2018 Estimate	2021 Census	Actual Difference 2018 – 2021	Trajected Total 2033	Gap to be closed
3-15	15514	17686	15004	-2682	19113	4109
16 – 64	43702	44516	39595	-4921	46146	6551
65 and over	18630	18878	17750	-1128	20027	2277
Total						12937

Source ONS Census 2021

30. The Census 2021 also provides estimates that classify usual residents in Wales aged 3 years and over in Wales by Welsh language skills and country of birth and their Welsh language abilities⁹.

⁹ ONS (March 2023) <https://api.beta.ons.gov.uk/v1/datasets/RM160/editions/2021/versions/1>

31. **Table 7** summarises and analyses the dataset by the usual resident's Welsh language skills.

Table 7: Census 2021 Welsh Language Skills by Country of Birth

Country of Birth	Usual Residents 3+	No Skills in Welsh		Can Speak i), iii) & iv)		Other Skills v) & vi)	
			%		%		%
Cymru/Wales	133725	46379	34.7%	67396	50.4%	16,985	12.7%
England	37876	29538	78.0%	4565	12.1%	3,071	8.1%
Scotland	1227	994	81.0%	117	9.5%	98	8.0%
Northern Ireland	393	316	80.4%	41	10.4%	27	6.9%
Ireland	514	387	75.3%	58	11.3%	56	10.9%
Other Europe	5053	4370	86.5%	360	7.1%	263	5.2%
Africa	927	798	86.1%	66	7.1%	54	5.8%
Middle East and Asia	2136	1880	88.0%	114	5.3%	108	5.1%
Americas	553	429	77.6%	72	13.0%	41	7.4%
Australasia	256	179	69.9%	42	16.4%	28	10.9%
Born Outside Wales	48935	38891	79.5%	5435	11.1%	3,746	7.7%
Totals	182660	85270	46.7%	72831	39.9%	20,731	11.3%

Key

i) Can speak, read and write

ii) Can Speak but cannot read or write

iii) Can speak or read but cannot write

iv) Can speak and other combinations of skills in Welsh

v) Can understand spoken Welsh only

vi) Other combinations of skills in Welsh, not including speaking

Source: ONS (March 2023)

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/methodologies/demographyandmigrationqualityinformationforcensus2021>

32. The key messages are:

- Of the 133,725 residents born in Wales over one third (46,379 - 35%) have no skills in Welsh.
- Of the 48,935 residents born outside of Wales, around one in five (19%) have some combination of Welsh language skills, with one in nine (11%) able to speak Welsh. Of these:
 - Of the residents born in England (37,876) around one in eight (4,565) are able to speak Welsh with a further 3,071 having some other combination of Welsh language skills.

- Of the residents born in the rest of the countries of the British Isles (2,134) around one in ten (10.1%) are able to speak Welsh with a further one in twelve (8.5%) having some other combination of Welsh language skills.
33. ONS advises that caution should be taken in interpreting the results as a person may appear in more than one category depending on which combination of skills they have.
34. The updated WLIA (2022) also took into consideration the analysis of the PLASC data up to 2019. This suggested a slight rise in the number of pupils aged 5 – 15 who were (as reported by parents) able to speak Welsh (either fluently or not fluently) from 13,780 in 2011 to 14,065 by 2018. The data from years 2021 to 2023 suggests that the numbers have increased substantially to 2021 (18,075) but has then declined to 17,500 by 2023.

The impact of net migration

35. The WLIA (2019) and updated WLIA (2022) assessments benefitted from access to Census 2011 data which allowed analysis of the linguistic characteristics of in-migrants into Carmarthenshire who reported that they lived at a different address 12 months previously. At the time of writing this report, this data has not yet been released from the 2021 Census.
36. The Turley report, in analysing gross migration figures for 2019/20, suggested that a large proportion of movements occur with neighbouring authorities. The exception to this is the relatively large number of young people aged 18 – 24 who re-locate to Cardiff (primarily for higher or further education). It is not known whether the linguistic characteristics of these cohorts will be similar or different to the assumptions made in the 2022 updated WLIA.
37. The updated Turley Report (2023) suggests that “the growing net inflow from other parts of the UK appears to have been comprised of people of all ages. This last year included those aged 18 to 24 with the change appearing to have been driven by reduced outmigration.”¹⁰ The report also notes that there is a net inflow movement of people

¹⁰ Turley, op. Cit. Para. 5.4

from Swansea to Carmarthenshire of circa 213 per annum and an undisclosed net inflow from Ceredigion.

38. For the 2022 updated WLIA, the following assumptions were made in terms of the linguistic skills of inward and outward migrants based on people aged 3+ who moved from/to Carmarthenshire one year before to 2019/20 migration figures.

Table 8: Updated WLIA (2022) Table A2.2-5: Crude estimate of Impact of Net Migration on the Number of Welsh Speakers

Estimate of Linguistic Characteristics of Annual Number of Net Migrants (Applying Ratios of Residents Age 3+ who moved from/to address in Carmarthenshire)							
Age Group	In			Out			Net
	From Rest of Wales @33%	From Rest of UK @t 15%	Estimated Welsh speakers	To Rest of Wales @40%	To Rest of UK @ 40%	Estimated Welsh speakers	Welsh speakers
3 - 15	145	36	181	138	45	183	2
16 - 60	932	302	1234	909	538	1446	213
60+	207	79	286	141	116	257	-29
Totals	1284	417	1701	1188	699	1886	186

39. We then analysed the implications for the changes to the number of Welsh speakers.

“Analysis of the gross migration figures show that a significant proportion of net migration in terms of Carmarthenshire (in and out migrants) are internal to Wales.

The analysis of the 2011 Census of Population returns for those persons who moved from an address outside the County during the previous twelve months also suggests that a significant proportion (around a third 33%) of in migrants to Carmarthenshire were from households where at least one adult spoke Welsh.

Similarly, around one in six households (15%) from outside Wales had at least one adult who speaks Welsh.

The analysis suggests, that based on the migration rates reported in 2019/20 and the percentages of those who either moved in or out of Carmarthenshire within 12 months at the time of the Census in March 2011, the net number of Welsh speakers increases by 186 per year. When applied to the remainder of the Plan Period (13 years) this suggests that the number of Welsh speakers could increase by 2,418 as a result of net migration.

Whilst past results are, in themselves, no predictor of future outcomes, the evidence presented does suggest that gross in migration is likely to include a significant proportion of households where at least one adult may be able to speak Welsh and thus provide better foundations to plan for enhancing the resilience and vitality of the Welsh language.”

40. Unless, or until, the 2021 Census tables relating to the linguistic abilities of those persons who moved from an address outside the County during the previous twelve months are published, it will not be possible to update what assumptions should be made regarding the proportion of inward and outward migrant households to the County that have at least one adult able to speak Welsh. However, the figures for the migration patterns for households who lived at a different address 12 months previous to Census Day gives an idea of the level of inflows. **Table 9** analyses inflows by age group.

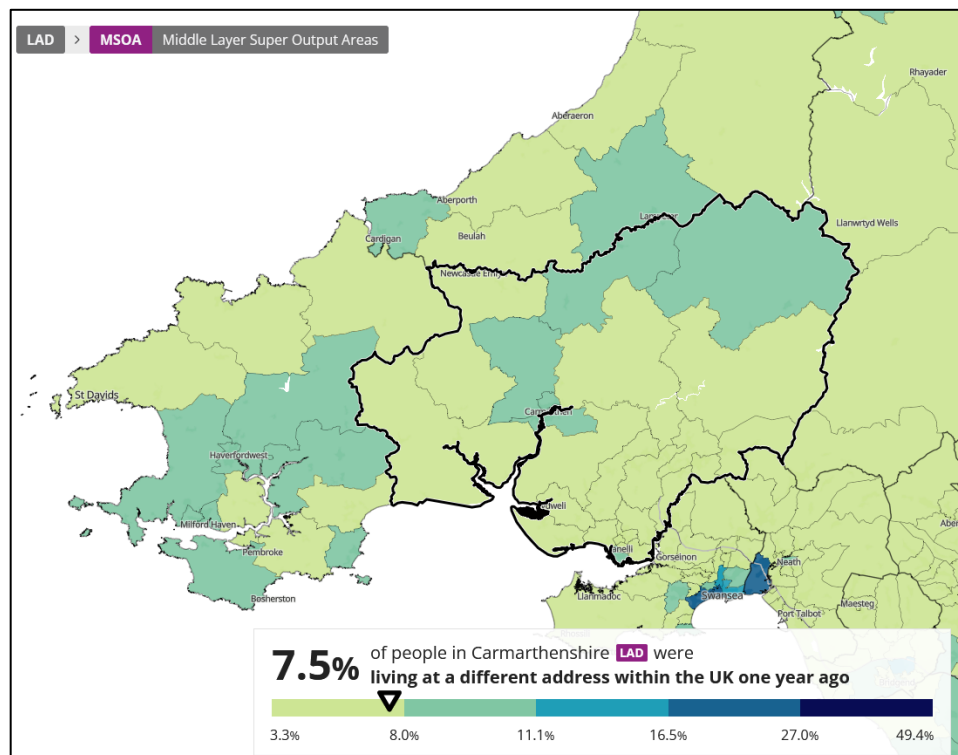
Table 9: Estimates of Net Inflow Migration by Age Group for 12 months prior to 2021 Census day

Oed	Lived at same Address	% age	Inflow from other parts of Carmarthenshire	% age	Inflow from other parts of Wales	% age	Inflow from other parts of the UK	% age	Inflow from outside UK	% age	Total
Age 5 - 15	18569		1420		280		186		37		
16 - 64	105581		6057		2301		1827		459		
65 and over	44003		791		275		321		76		
Totals	168153	92.3%	8268	4.5%	2856	1.6%	2334	1.3%	572	0.3%	182183

Source: ONS (March 2023) Migration by Age Table MIG014EW

41. **Figure 4** also provides a geographical expression of the different levels of households living at a different address within the UK (including other parts of Carmarthenshire) at MSOA level. The dark green areas (where household movements are in the 8 – 11.1% range) include Carmarthen, Cynwyl Elfed, Llanfihangel ar Arth and Llanybydder and Llanyddyfri and their catchment areas.

Figure 4: Estimates of the Proportion of people living at a Previous Address within the UK 12 months prior to 2021 Census day (including addresses within Carmarthenshire)



Source ONS 2021 Census Migration Maps

42. When compared to Welsh speaker density as shown in **Figure 1, Table 1** and the analysis of changes in density since the 2011 Census, the evidence does not appear to suggest that there is a strong geographic correlation between the level of one year household movements between 2019 and March 2020 and the past ten-year changes in linguistic abilities between the Censuses.

Other Evidence

43. Another contributing factor to the influence of the LDP's Growth and Spatial Strategy Options is the relationship between housing completions and overall house sales. It is often asserted that the magnitude of land released for housing annually is likely to influence the magnitude of linguistic shift, particularly at local level, and in linguistically sensitive areas as the host community is unable to absorb the incoming households linguistically.

44. **Table 10** reproduces the annual residential property sales for Carmarthenshire for the period 2018/19 to 2022/23 and compares it to housing completions for the same period. Note that the completion figures for 2021/22 includes completions for the year to March 2020 as the Annual Monitoring Report was not published for 2019/20 due to Covid restrictions.

Table 10: 5-year comparison of Residential Property Sales and Housing Completions

Indicator	Year ending March 31					5 yr. Totals	Average per year
	2019	2020	2021	2022	2023		
Sales	2853	2722	2520	3151	2191	13437	2687.4
Completions	277		1213	490	229	2209	441.8

Sources Sales ONS (2023) House Price Statistics for Small Areas (HPSSAs); Completions Carmarthenshire County Council LDP Annual Monitoring Reports

45. **Table 10** shows that the total number of residential property sales for the five-year period up to March 2013 was 13,437. This compares to the total completions for this period of 2,209, making a ratio of over six between sales and completions. The proposed average build rate for the revised LDP of 588 is likely to increase the completion rate by over 20% but will still represent 22% of the historic average of residential property sales.

Review of Assumptions for the Preferred *Spatial Strategy*

46. The revised Preferred Spatial Strategy (PSS) adopts a hybrid option identified as a 'Balanced Community and Sustainable Growth Strategy'. The Written Statement (WS) notes that *"The majority of the growth would be focussed in the following three areas: Carmarthen and surrounding area; Llanelli Coastal Belt; and Ammanford / Cross Hands area."* The option *"builds on Strategic Option 4 by retaining an approach which reflects the role and function of settlements but seeks to recognise and reflect investment and economic benefits of the City deal and other economic opportunities.... It will also seek to provide opportunities for rural areas."*¹¹

¹¹ Draft Deposit rLDP (2023), para. 8.20

47. The Spatial Strategy sets a settlement four-tier hierarchy within a settlement framework grouped under six clusters. These clusters, and the distribution of growth, focus on sustainable principles, but *“seeks to recognise the respective role, function and contribution each settlement has within its particular clusters. The role of smaller settlements within Carmarthenshire to deliver local and sustainable growth is recognised.”*

48. The updated WLIA (2022) sought to identify whether the hybrid option would, in relation to the existing LDP’s strategy (Option 1 Current LDP Option) and the rLDP2 original strategy, help or hinder the rLDP2 Area’s ability to meet the trajectory target of 95,609. The analysis concluded that there was a realistic possibility (between 55 and 75% probability) of the strategy based on the 10-year trend projection providing minor positive benefits to achieving the trajectory.

49. **Table 11** provides an analysis of the Census 2021 results for each Cluster compared to the position in 2011 and the assumption made for the assumptions made about the 2018 baseline for the 2022 WLIA.

Table 11: Estimate of Number of Welsh Speakers by Cluster and Changes since 2011 Census

Cluster	No. of Speakers 2011	No. of Speakers 2021	Change	Change %	WLIA 2022 2018 baseline assumption	Difference (2021 v 2018)	% Divergence
Cluster 1	15191	14851	-340	-0.02	15597	-746	-4.8%
Cluster 2	22736	20273	-2463	-10.83	23344	-3,071	-13.2%
Cluster 3	24069	22713	-1356	-5.97	24712	-1,999	-8.1%
Cluster 4	6745	5384	-1361	-20.17	6925	-1,361	-19.7%
Cluster 5	5472	5373	-99	-0.18	4869	-504	-10.4%
Cluster 6	4008	4258	+250	+6.23	4115	+143	+3.5%
Total	78221	72852	-5520	-7.12	79562	-7,681	-9.7%

Source: 2011 and 2021 Censuses and authors’ own estimates

50. In relation to the position in 2011, the 2021 census data presented in **Table 11** shows the steepest declines in Cluster 4 (Dyffryn Teifi) and Llanelli and Gwendraeth Isaf. Both Cluster 1 (Carmarthen) and Cluster 5 (Tywi Uchaf) show small comparative declines. Cluster 3 (Aman and Gwendraeth Uchaf), whilst still retaining its prime position as having the highest number and proportion of Welsh speakers, nevertheless shows that there has been a decline of almost 6% in the number of Welsh speakers. Cluster 6 (Western Sir Gâr) shows an increase in the number of Welsh speakers by 6%. Further analysis of the figures for this Cluster, however, estimates that there has been a decline in the proportion of Welsh speakers from 40.4% to 38.9%.
51. There does not appear to be a recognisable pattern to the differences spatially. Both the more urban and more rural clusters show divergences in percentage changes. Both higher density clusters (Aman and Gwendraeth Uchaf and Tywi) and the other medium density clusters have variations in their 2021 performances.
52. Previous analysis of the changes between 2001 and 2011 Census showed weak correlation at LSOA level between development and the performance of the Welsh language.
53. In relation to the 2018 baseline assumptions, Table 11 shows the divergence between the differences in percentage terms between the 2018 baseline and actual 2021 results range from +3.5% (in Cluster 6) to -19.7% (in Cluster 4). The biggest divergence numerically between the 2018 baseline and the 2021 Census outcomes is seen in the Llanelli and Gwendraeth Isaf cluster (-3,701) whilst the biggest divergence in proportional terms is seen in Cluster 4 (Dyffryn Teifi).
54. A key assumption of the model used to allocate future Welsh speakers between clusters is that the increase in households for each cluster will reflect the assumptions made on the following:
- The proportion of the population aged 3 and over remains the same over the period up to 2033 at 97.2%.
 - Average household size remains at 2.26.
 - The relationship between the increase in number of households per cluster reflects the proportion of allocations made to each cluster.

- The proportion of projected Welsh speakers for each cluster by 2033 reflects the proportion recorded at the 2011 Census baseline.

How would this have affected the 2022 WLIA and would the outcome be different?

55. Both the ISA Framework and WLIA are predicated on the key “sustainability” question *“Will the LDP encourage the growth of the Welsh language and culture?”* In other words, will either the growth and spatial strategies adopted, compared to the current “Business as Usual” strategies (i.e. the current LDP), help or hinder the growth of the Welsh language and culture.
56. In the updated WLIA (2022), we concluded that the preferred growth strategy (based on ten-year trend projection and incorporating assumptions about births, deaths, net internal migration and international migration) could have a realistic possibility of having a minor adverse impact on the trajectory objective. However, we also noted that without further evidence and understanding of the relationship between household formations, employment growth and housing land allocation take-up and changes in new Welsh language speakers the level of confidence in the prediction of magnitude of impact is low.
57. The outcomes of the 2021 Census on the number of Welsh speakers strongly suggests that the underlying assumptions of the updated WLIA (2022) in relation to a growth of Welsh speakers in the Plan area since 2011 are not supported. However, the Annual Population Survey suggest that there has been a growth in the proportion of Welsh speakers. Both ONS and the Welsh Government are aware at National level of the significant differences between the 2021 census results and the APS estimates and are in the Process of undertaking Research to better understand the sources of the differences.
58. The PLASC data for January 2022 also suggests that the proportion of pupils aged 5 – 15 able to speak Welsh is higher than the proportion recorded at the Census.
59. The Cymraeg 2050 Trajectory model used to assess the outcome of the WLI assessment for the preferred growth strategy is based on the Welsh Government’s 2014 Population

Principal Variant Projection. Without an updated Cymraeg 2050 Trajectory model it is difficult to draw a conclusion as to whether the magnitude of impact assessed on the trajected number of Welsh speakers of the rLDP2 Preferred Growth Strategy (compared to the current LDP (Business as Usual) Growth Strategy) would be different. However, we have less confidence in the probability or likelihood of outcome. Within the Risk Matrix, given that our confidence level is already at the lower end of the four-scale range this would not have affected our score.

60. For reference, Figure 5 reproduces the updated 2022 WLIA score for the Preferred Growth Strategy.

Figure 5: Matrix and Score for draft Deposit rLDP Preferred Growth Strategy

Figure 2.7 Welsh Language Impact Assessment of Second Deposit LDP Preferred Growth Strategy

WELSH LANGUAGE RESILIENCE RISK MATRIX CARMARTHENSHIRE LOCAL DEVELOPMENT PLAN PREFERRED <u>GROWTH</u> STRATEGY					MAGNITUDE OF IMPACT/CONSEQUENCES OVER PLAN PERIOD				
					Welsh Language Resilience: $I(WLR) = NWS + PWS$ threshold weighted	Major Positive	Minor Positive	Minor Negative	Major Negative
						Increase of 2.5 percentage points, or more in the percentage of projected Welsh speakers in the Plan Area aged three and over above the trajectory	Increase of less than 2.5 percentage points in the percentage of projected Welsh speakers in the Plan Area aged three and over above the trajectory	Decrease of less than 2.5 percentage points in the percentage of projected Welsh speakers in the Plan Area aged three and over above the trajectory	Decrease of 2.5 percentage points, or more in the percentage of projected Welsh speakers in the Plan Area aged three and over above the trajectory
					High	Low	Low	High	
	Probability	Frequency	Score		2	1	-1	-2	
LIKELIHOOD ↑	Experience shows that growth/decline in the population on this scale will make it highly likely in the majority of cases	Evidence to show it occurs at least 8 times out of 10 in the Previous Development Plan	Highly Likely	4	8	4	-4	-8	
	Experience shows that growth/decline in the population on this scale will make it likely in the majority of cases	Evidence to show it occurs at least 5 - 7 times out of 10 in the Previous Development Plan	Likely	3	6	3	-3	-6	
	Experience shows that growth/decline in the population on this scale will make it possible in the majority of cases	Evidence to show it occurs at least 3 - 4 times out of 10 in the Previous Development Plan	Possible	2	4	2	-2	-4	
	Experience shows that growth/decline in the population on this scale will make it highly unlikely in the majority of cases	Evidence to show it occurs at least 1 - 2 times out of 10 in the Previous Development Plan	Highly Unlikely	1	2	1	-1	-2	

Source: Iaith Cyf. And BURUM (December 2022) Revised Carmarthenshire Local Development Plan 2018 – 2033 Draft Second Deposit Welsh Language Impact Assessment

61. Our impact analysis of the rLDP's Preferred Spatial Strategy can be summarised as being based on apportioning the trajected growth in the number of Welsh speakers to each cluster according to our estimate of the proportion of usual residents aged 3 and over for the 2018 baseline and apportioning the housing allocations proposed to each cluster in the Draft Deposit rLDP2 and assuming a similar proportional growth in each cluster. The main impact analysis then compared this with what might have happened under the

current LDP1 Spatial Strategy (Business as Usual) Scenario assuming the distribution of employment and housing reflecting their existing scale in each cluster area.¹²

62. In terms of the Welsh language impact of the current (Business as Usual) Spatial Strategy, we concluded that the rLDP2 Spatial Strategy would have minor positive impact (+1). We caveated our score on the uncertainty surrounding the lack of sub county population projections and the lack of current data available on the WESP targets and gross migration patterns available at cluster level and the assumption that the trajected growth in Welsh speakers would occur in proportion to the estimated 2018 usual residents age 3+ for each cluster.

63. The low level of likelihood given in the Risk Matrix reflects the above uncertainty.



64. Without additional information on the geographic impact of the WESP and a better understanding of the linguistic impact of spatial gross migration patterns, together with an updated Cymraeg 2050 Trajectory model, it is difficult to draw a conclusion as to whether the magnitude of impact assessed on the trajected number of Welsh speakers of the rLDP2 Preferred Spatial Strategy (compared to the current LDP (Business as Usual) Spatial Strategy) would be different. However, we have equally low confidence in the probability or likelihood of outcome. Within the Risk Matrix, given that our confidence level is already at the lower end of the four-scale range this would not have affected our score.

¹² See Iaith Cyf. and BURUM (December 2022) WLIA Update, see Section 2.4.6 for a more detailed discussion).

65. **Figure 6** reproduces the updated 2022 WLIA score for the Preferred Spatial Strategy.

Figure 6: Matrix and Score for draft Deposit rLDP2 Preferred Spatial Strategy

Figure 2.8 Predicted Risk Score for the Preferred Spatial Strategy

WELSH LANGUAGE RESILIENCE RISK MATRIX CARMARTHENSHIRE LOCAL DEVELOPMENT PLAN PREFERRED <u>Spatial</u> STRATEGY					← MAGNITUDE OF IMPACT/CONSEQUENCES OVER PLAN PERIOD →				
					Welsh Language Resilience: f(WLR) = NWS + PWS threshold weighted	Major Positive	Minor Positive	Minor Negative	Major Negative
						Increase of 2.5 percentage points or more in the percentage of projected Welsh speakers in the Plan Area aged three and over above the trajectory	Increase of less than 2.5 percentage points in the percentage of projected Welsh speakers in the Plan Area aged three and over above the trajectory	Decrease of less than 2.5 percentage points in the percentage of projected Welsh speakers in the Plan Area aged three and over above the trajectory	Decrease of 2.5 percentage points or more in the percentage of projected Welsh speakers in the Plan Area aged three and over above the trajectory
					High	Low	Low	High	
	Probability	Frequency	Score		2	1	-1	-2	
 LIKELIHOOD 	Experience shows that growth/decline in the population on this scale will make it highly likely in the majority of cases	Evidence to show it occurs at least 8 times out of 10 in the Previous Development Plan	Highly Likely	4	8	4	-4	-8	
	Experience shows that growth/decline in the population on this scale will make it likely in the majority of cases	Evidence to show it occurs at least 5 - 7 times out of 10 in the Previous Development Plan	Likely	3	6	3	-3	-6	
	Experience shows that growth/decline in the population on this scale will make it possible in the majority of cases	Evidence to show it occurs at least 3 - 4 times out of 10 in the Previous Development Plan	Possible	2	4	2	-2	-4	
	Experience shows that growth/decline in the population on this scale will make it highly unlikely in the majority of cases	Evidence to show it occurs at least 1 - 2 times out of 10 in the Previous Development Plan	Highly Unlikely	1	2	1	-1	-2	

Source: Iaith Cyf. And BURUM (December 2022) Revised Carmarthenshire Local Development Plan 2018 – 2033 Draft Second Deposit Welsh Language Impact Assessment

Implications for the County's status as an Area of Linguistic Sensitivity and Significance

66. Carmarthenshire County Council adopted the following motion at its full Council meeting on 10th July 2019:

“This council believes that the whole of Carmarthenshire is an ‘area of linguistic sensitivity and significance’ and that the planning system has a crucial role to play in supporting the Welsh language across the county. To this end, we believe that the language should be a Material Planning Consideration in all applications for the development of five or more houses in rural areas and ten or more in urban areas in every community, irrespective of the percentage of Welsh speakers.

We maintain that this policy is necessary and justifiable due to:

- *the need to address the severe and unexpected reduction in the number of Welsh-speakers in Carmarthenshire in the 2011 Census*
- *being a contribution towards the Welsh Government’s target of creating a million Welsh-speakers by 2050*
- *complying with the Wellbeing of Future Generations Act, in particular “a Wales of Vibrant Culture and Welsh Language: a society that promotes and protects culture, heritage and the Welsh language...”*

67. This decision was taken before the release of the 2021 Census results for the Welsh language, which again saw a significant and unexpected reduction in the number of Welsh speakers.

68. Since July 2019, there have been three significant changes to the national policy context:

- publication of Editions 11 and 12 of Planning Policy Wales
- publication of Future Wales 2040, and
- the establishment of the Commission for Welsh-speaking Communities.

Planning Policy Wales

69. Revisions to Planning Policy Wales were published in February 2021 and in February 2024. Neither edition has seen any changes to sections 3.25 - 3.29 with the advice remaining the same in terms of the option to require a Linguistic Impact Assessment for all major windfall developments. Neither TAN 20 (published in October 2017) nor the Local Development Plans Manual (published March 2020) have been updated and offer the option for local planning authorities to identify areas of linguistic sensitivity or importance when preparing and/or reviewing their local development plans.

Future Wales 2040

70. Future Wales – The National Plan 2040 was published in March 2021. Whilst it does not contain a specific policy relating to the Welsh language, its Future Wales Outcomes Framework contains an outcome which seeks to realise a “Wales where people live ... in places with a thriving Welsh language”. It also recognises that “the language will be an embedded consideration of all development plans”. It adds “Where Welsh is the everyday language of the community, development will be managed to ensure there are jobs and homes to enable the language to remain central to those communities’ identities. Elsewhere development will be a positive force towards encouraging the

creation of education and social infrastructure to enable the language to develop as a natural, thriving part of communities.”

The Commission for Welsh-speaking Communities

71. The Commission for Welsh-speaking Communities was established by Welsh Government in August 2022 to identify and make public policy recommendations aimed at strengthening Welsh-speaking communities. In its initial position paper, published in June 2023, it identified the need to designate areas of linguistic significance (higher density) and suggested land use planning as one policy area which could benefit from such policy intervention. The Commission is due to publish its report on its findings in August 2024.
72. In our view, none of the changes to the policy context identified above has any significant implications to the whole of the county’s being designated as an *‘area of linguistic sensitivity and significance’*.

Census 2021 Results

73. In addition, we have also considered whether the Census 2021 results in relation to the Welsh language have any implications for the July 2019 decision.
74. Whilst 103 of the 111 LSOA’s saw a decrease in the proportion of Welsh speakers the data at electoral ward level shows that there are significant numbers of Welsh speakers in all wards, ranging from a little over 500 in Talacharn (Laugharne) to over 4,000 in the combined Carmarthen town wards.
75. In our view, we consider that the rationale for the designation of the whole county as an *‘area of linguistic sensitivity and significance’* remains fit for purpose, especially within the context of the Council’s overall strategic direction including its Welsh in Education Strategic Plan and its Welsh Language Promotion Plan.