Vale of Glamorgan Well-being Assessment

Evidence Report

Maximising Opportunities and Attainment

Note

The evidence reports produced to accompany the Vale of Glamorgan Well-being Assessment are intended to be used as ongoing working documents rather than public and as such are not edited in a final format.

The Vale of Glamorgan Well-being Assessment is comprised of a number of components as outlined below. We recognise that this is a large document and it is intended to form the evidence base for the Well-being Assessment which is published as an overview document. This document provides a place to set out the evidence used in the main assessment rather than to provide comprehensive interpretation and analysis.

It should be noted that sources of the information included can be found in the evidence and research directory that forms part of the package of documents that comprise the Vale of Glamorgan Well-being Assessment. The directory can be used to find further information in relation to the evidence presented here where it has not been included i.e. for other time periods, comparisons to other areas and the metadata that accompanies the dataset.

Vale of Glamorgan Well-being Assessment Components

In order to ensure the information produced is useable by a variety of audiences the Vale of Glamorgan assessment is comprised of a range of constituent parts to form a package of information as below:

- **An overview document** – This acts as the main document and is what the PSB considers to be the Well-being Assessment. It forms a summary of findings across the various sections of the assessment and makes links between them. This document also summarises potential areas for further 'response' analysis to inform the Well-being Plan in 2018, as determined by the PSB.
- **A detailed evidence report for each of the four sections**– These are longer more detailed documents bringing together a range of the data and information used to inform the main overview document and are intended to set out the evidence base used to inform the assessment rather than provide a comprehensive analysis.
- **An evidence and research directory** – A directory of links to the various resources used to inform the assessment should users wish to access even more information and raw data on a topic. This document should be used to find the source of information used in the detailed evidence reports. The Common Data Set and National Indicators have also been incorporated into this directory.
- **'Let's Talk' Engagement Findings Report** – A detailed analysis report of the findings from the 'Let's Talk' engagement exercise.
- **Three community area based reports** on each of the community areas used within the assessment – Barry, Eastern Vale and Western Vale.

Maximising Opportunities and Attainment Key Findings

This section of the assessment focuses on education, employment, business, culture and tourism. By ensuring residents of the Vale of Glamorgan are able to maximise the opportunities available to them the Vale PSB will contribute towards achieving the following national well-being goals: a Prosperous Wales, a More Equal Wales, a Wales of Cohesive Communities, a Wales of Vibrant Culture and Thriving Welsh Language, a Healthier Wales and a Resilient Wales.

Evidence within this section should also be considered in relation to findings within other sections of this assessment as links are found between a range of other aspects of having good well-being. For example the impact of tourism and the natural environment on increasing the economic well-being of the area, good transport and IT infrastructure on remaining part of a community and avoiding social isolation and a good quality education in the early years on future mental and physical well-being.

The links between the various sections of this assessment are perhaps best demonstrated through Dahlgren and Whitehead's model referenced earlier in this assessment which highlights a causal relationship between individual lifestyle factors, social networks, working and living conditions and economic, political and environmental factors, globally, nationally and locally.

Education

- Gaps in development between children from affluent and deprived families are already marked by the age of 3; international evidence suggests the biggest opportunities for changing life chances lie in the pre-school years, although action at every stage of a child’s life is important.

- The Foundation Phase Assessment for 4-5 year olds is made up of four Areas of Learning – Personal and Social Development; Language, Literacy and Communication; Mathematical Development; and Physical Development. In 2015/16 in the Vale of Glamorgan the percentage of children reaching the expected outcome or above across all of these areas of development combined was 91.2%. This was the highest across the Central South Education Consortium Area and was the 2nd highest in Wales behind Monmouthshire (91.7%).

- The percentage of children in need reaching the expected outcome at the foundation phase assessment was also higher than the Welsh average.

- In the Vale 11.8% of primary and secondary school pupils are eligible for free school meals. This compares to the Welsh figure of 17.3% for primary schools and 15.6% for secondary schools.

- For the 2015/16 academic year 67.1% of pupils aged 15 in the Vale achieved the Level 2 threshold including a GCSE grade A*-C in English/ Welsh First Language and Maths. The Welsh average was 60.3%. Although the Vale well above average it is important to consider that we should be aiming to be on par with English authorities of similar socio-economic profiles.

- While overall the Vale of Glamorgan performs well at Level 2 when compared to others in Wales, levels of attainment vary greatly. Based on a three year average, 2010/11 to 2012/13, it ranges from 21% in the 'Gibbonsdown 4' LSOA to 97% in the 'Plymouth (VoG) 3' LSOA.

- Overall, standards have improved in all key education performance indicators and in nearly all cases the rate of improvement has been greater in the Vale than in the Wales average. School attendance remains in the top quartile of performers in Wales for both secondary and primary schools.

- In the Vale 11.8% of primary and secondary school pupils are eligible for free school meals. This compares to the Welsh figure of 17.3% for primary schools and 15.6% for secondary schools.

- The performance of pupils entitled to free school meals has improved since 2012, albeit not always at the same rate as their peers.

- The difference in the Foundation Phase Outcome Indicator (FPOI) performance for those pupils entitled to free school meals (eFSM) and those that are not (non FSM) was 13.7% in the 2015-16 academic year.

- The difference in the Core Subject Indicator (CSI) performance between eFSM and non FSM at KS2 has decreased to 17.3% to 14% for the 2015-16 academic year.

- The gap between eFSM and non FSM at KS3 increased slightly for the 2015-16 academic year although the performance for FSM eligible pupils is rapidly increasing and this widening gap is therefore attributed to the performance of non-FSM pupils also increasing.

- At KS4, for the level 2+ threshold, the difference in performance between eFSM and non FSM shows a marginal narrowing.

- Based on eligibility from FSM, the Vale of Glamorgan's indicative ranking for educational attainment is 5th in Wales,that is that the Vale would be expected to have the 5th best performance for attainment indicators in Wales based upon the number of FSM eligible pupils in the cohort. The Vale performed above 5th for all indicators across all key stages in the 2015-16 academic year.

- At March 2016, 65% of children aged 16 in the Vale in care left care with at least one qualification.

- There are still variations in the attainment of children in need for example in 2015 only 37% achieved 5 or more GCSE passes at A*-G compared to 58% in 2014. However it is important to remember these percentages are based on small numbers.

- The percentage of year 11 pupils who become NEET continues to decrease year on year and remains below the Welsh average for 2015-16. The Vale has performed well at all age groups for 2015/16 with 1.5% of year 12 leavers NEET compared to the Welsh average 1.6%. At year 13, 2.92% of leavers were NEET in the Vale compared to the Welsh average of 3.76%.

- The National Survey for Wales showed that parents qualified to NQF level 4 or above were 20% more confident to help children with their writing than those without any qualifications and 22% more confident in their maths ability to help children with their maths work than those without a qualification.

- Qualifications levels for those aged 16-64 in the Vale are above the Welsh Average.

- The success rate for adult and community learning courses for priority learners in the Vale of Glamorgan was 86%. The success rate across the Cardiff and Vale partnership for priority learner groups was 91% in this period. Data for the 2015-16 academic year is unlikely to become available until Summer 2017

- In response to a question on training opportunities in the Let's Talk survey, people raised concerns about costs, age restrictions and about a lack of opportunities for part time employees. However others quoted supportive employers and good support from Careers Wales.

Economy, Employment and Business

Economy

- The Let's Talk survey results showed that the majority of respondents felt their economic well-being would decrease over the next 5 years with the EU referendum results consistently highlighted as the reason for their answer.

- Gross Value Added is higher in the Cardiff and Vale region than other parts of Wales although this has fallen in recent years.

- Gross Disposable Household Income is also higher in the Cardiff and Vale Region than the Welsh average but lower than the UK average even when London and the South East are excluded.

- Average weekly earnings in the Vale are higher than the Welsh and UK average, latest data shows the average gross weekly pay for full time workers in the Vale to be £607 compared to the Welsh average of £498.

- Gross average weekly pay is higher for male full-time workers than females in the Vale although hourly pay rates show females earn slightly more per hour than their male counterparts, suggesting women in the Vale work fewer hours.

- Despite high average earnings overall, differences in income can be observed within the Vale of Glamorgan. Median household incomes in Barry are significantly lower than areas of the Eastern and Western Vale. Differences also still exist within these communities with households in Llantwit Major and St Athan having lower incomes than other parts of the Western Vale and Llandough, Cornerswell and Stanwell having lower median household incomes than other parts of the Eastern Vale.

- Across Wales 17% of the population are experiencing income deprivation compared to 14% in the Vale. At LSOA level Dinas Powys 1 had the lowest percentage experiencing income deprivation (4%), compared to Gibbonsdown 2 with the highest at 41% - more than double the Wales figure.

- The Vale is part of the Capital City Region and five priorities have been identified for economic growth; connectivity, digital, innovation, skills, business support and regeneration.

- A number of infrastructure projects will help support economic growth in the Vale and wider region including, the Great Western mainline electrification, Cardiff Capital Region Metro and the Cardiff Airport Enterprise Zone.

- A comprehensive programme of regeneration is being implemented across the Vale including, the Rural Local Development Strategy, Town Centres Framework, Penarth Esplanade, Barry Waterfront including the Barry Island Link Road, Barry Island and links between Penarth Haven and the Town Centre.

Employment

- Of those who are economically active in the Vale 74% are in employment, slightly higher than the Welsh and UK average. 4% are unemployed which is lower than the Welsh and UK averages.

- The percentage of males in the Vale who are self employed is also above the Welsh and UK average whereas the percentage of females self employed is below both the Welsh and UK average.

- Of those who are economically inactive, the highest percentages (25.4%) are looking after the family/home or are students (24.9%). Only 13.7% were economically inactive due to retirement compared to a Welsh average of 15%. 21% were economically inactive due to long-term sick compared to the Welsh average 28.5%.

- Of those who are economically inactive in the Vale 28.2% want a job, slightly higher than the Welsh and UK average.

- The highest percentage of Vale residents in employment were employed in major group 1-3 positions which include managers, directors and senior officials, professional occupations or associate professional and technical. A higher proportion of Vale residents are employed in these occupations compared to the Welsh and UK averages.

- The Let's Talk survey results showed that most respondents were either very or fairly satisfied with their job.

- Areas of the Vale which observe the lowest household incomes are also those with the lowest employment rates.

- The percentage of working age people claiming job seekers allowance has increased recently in the Vale and is now in line with the Welsh average whereas it has previously been below. However this is attributed to the Welsh average falling rather than the rate in the Vale significantly increasing.

- The highest percentages of working age people claiming JSA can be found in Barry and in St. Athan in the Western Vale.

- The percentage of JSA claimants who are aged 17-24 in the Vale has previously been in line with the Welsh average but began to increase above average in September 2015. An increase in September has also been observed in previous years which could be attributed to young people leaving education and claiming JSA. Given the overall low numbers of JSA claimants in the Vale the increase could therefore be more pronounced. The Vale also has lower than average NEET figures so further analysis would be required to understand this trend.

- The Vale has a lower than Welsh average percentage of workless households and children living in workless households.

- More females in the Vale are enrolled on apprenticeships than males particularly with regards to higher level apprenticeships. The highest numbers of those undertaking apprenticeships were in the 20-24 year old age band. A considerably higher number of females aged 50 and over were enrolled on apprenticeships than males aged 50 and over.

- The Financial Inclusion Strategy recognises the impact of welfare reform and issues relating to in work and out of work poverty.

- When considering the gap in those with long-term health conditions classed as employed compared to those without a condition and employed, the Vale had one of the smallest gaps in Wales and was significantly below the Welsh average.

- The percentage of working aged people aged 50+ in employment is higher in the Vale than the Welsh average.

- The latest Childcare Sufficiency Assessment for the Vale of Glamorgan (2016/17) found that there are a total of 6,367 places offered during term time and 2,603 vacancies (41%) across the Vale of Glamorgan. During school holidays the number of places reduces to 2,056 and vacancies are only available with childminders and out of school care.

- The Western Vale has the highest number of childcare places during term time and 44% of these are vacant. During the school holidays, childcare is more evenly spread across the three community areas. The most saturated area for childcare providers is Barry with a total of 103 (42%) although as above the Western Vale has the highest amount of childcare places during term time (41%) and 44% are vacant. This is due to a day nursery in Cowbridge that states a capacity for 966 childcare places. The majority of holiday provision is in the East Vale (54%).

Business and Industry

- The number of active business in the Vale has increased in recent years although the rate of new active businesses has decreased but remains above the Welsh average.

- When considering business survival rates, the Vale had the highest rate of businesses reaching 5 years trading in Wales.

- The largest industries in the Vale are retail trade and the health and social care sector.

- When considering the projected change in jobs by industry in 2020 compared to 2014, the biggest losses are projected to be in public administration and defence, and the manufacture of plastics industries. The largest projected increases in jobs are predicted to be in the residential care and restaurants and mobile food service industries.

- Attractiveness of places is recognised as one of the most important factors to help businesses thrive.

Infrastructure

- A sustainable transport infrastructure and services can contribute to reducing negative impacts that cars have on the environment, reducing congestion, improving health and wellbeing, better access to employment, health and education and other facilities and reduce the risk of road accidents.

- Objectives in the Vale's Local Transport Plan which complements the Local Development Plan are, increasing the number of cycle trips, increasing the number of park and ride spaces and users, reducing congestion and improving air quality at strategic junctions and improving accessibility to bus services.

- In response to the Active Travel (Wales) Act 2013 the Council is seeking to address the transport issues in areas of inactivity within the Communities First cluster area in Barry as well as other centres of population. In rural locations where Active Travel Schemes cannot be achieved, community transport and bus service provision will be promoted to support improvements in accessibility for the more vulnerable user groups.

- There are a number of community transport services in the Vale including Greenlinks.

- Transport was often raised as a topic during the engagement undertaken for the assessment. Respondents wanted improvements to public transport in particular the frequency of buses and trains in rural areas although some felt there were good services. The condition of roads and pavements was also a frequently raised issue.

- In terms of the Let's Talk survey 31.9% of respondents reported being either concerned or fairly concerned about transport costs. 18% of respondents answered that they were fairly dissatisfied, or very dissatisfied, with their “access to public transport”. Respondents in the Western Vale recorded a higher rate of dissatisfaction with “access to public transport” than the other areas of the Vale of Glamorgan.

- 48.6% of residents have access to two or more cars/vans compared to 37.7% who have access to one car/van and 13.7% who have no access.

- According to the 2015 annual population survey there are 58,800 working residents in the Vale of Glamorgan. 28,500 residents work in the area and 30,300 commute out of the area. 14,300 people commute into the area. The majority commuting out of the area work in Cardiff and much smaller numbers are commuting to Bridgend and RCT.

- Most people (64.5%) travel to work by driving, this is slightly higher than the Welsh average (63.8%). A higher proportion of people use public transport (8.8%) and work from home (10.1%) than is seen on average across Wales. Use of public transport is highest in areas served by a train line e.g. Dinas Powys and Barry. Car ownership and the levels of commuting by car are highest in the rural, northern communities with less access to public transport.

- The percentage of the population travelling less than 10km to work is highest in St Athan, Penarth, Llandough, Barry, Dinas Powys and Llantwit Major. The common factor is close proximity to sources of employment.

- The metro vision for the capital region is for a multi-modal rapid transit network integrating all transport modules offering the passenger a single ticket ‘turn up and go’ experience. The metro project has been allocated £62 million for planning work and delivery of other improvements to public transport in the region.

- ICT has a significant potential contribution to reducing carbon e.g. reducing the need to travel but has itself a carbon footprint second only to the aircraft industry.

- Take up of broadband by the public in Wales is lower than England, but this mainly reflects the demographic profile rather than limited access.

- Residents and businesses in the Vale will be amongst the first in Wales to benefit from the pioneering multimillion pound programme Superfast Cymru, bringing nationwide fibre broadband to Wales.

- The Vale Public Opinion Survey undertaken in 2014 showed 80% of residents use the internet which is an increase from 72% in 2010. The biggest difference was by age with 95% of those aged under 55 using the internet but only 54% of those aged 55+ doing so.

- There are a range of projects being undertaken to improve digital skills and digital access across the Vale of Glamorgan.

Culture and Tourism

- The total number of visitors to the Vale of Glamorgan for tourism purposes continues to increase. Since the STEAM Tourism report was first produced in 2003 to 2014, there has been an 18.2% increase in visitors. In addition there has been a 65.9% increase in the economic impact of tourism in the Vale of Glamorgan during this time period and a 17.5% increase in total employment supported by the tourism industry.

- The Vale benefits from a wide range of natural assets that are valued by residents and visitors alike.

- The natural environment was consistently highlighted by residents as what's good about living in the Vale during the Let's Talk Engagement Campaign with beaches and parks consistently being mentioned.

- The National Survey for Wales showed that when considering whether residents have participated in arts events, visited historic places or visited a museum in Wales, the Vale ranked highly compared to other areas in Wales across all three activities showing good participation rates in cultural activities.

- People in the Vale of Glamorgan visit libraries on average slightly more times than the Welsh average.

- The Let's Talk Survey asked respondents to consider how often they participated in activities such as sport, recreational activities and arts and cultural activities. Arts and cultural activities was the category respondents were least likely to say they participated in daily with most saying they participated once or twice a month. Time was highlighted as the biggest factor that stopped respondents participating more, followed by money. This was the case across all age groups with the exception of 18-24 year olds where money was the biggest barrier.

- A higher proportion of Let's Talk respondents identified arts and cultural activities as fairly or very important than those who said these activities were not important.

- The highest proportion of Let's Talk respondents felt their cultural well-being would stay the same over the next 5 years, with lower percentages feeling it would either increase or decrease.

- The Vale's proximity to Cardiff and the cultural opportunities the capital city brings was highlighted as an asset during the engagement campaign.

- The Vale has a lower percentage of residents who can speak Welsh than the national average. The rate of Welsh speakers varies across the Vale with lowest rates being observed in areas of the Eastern Vale in addition to St Athan and Llantwit Major which may be attributed to the transient population in this area due to the RAF base.

- Let's Talk respondents were asked to consider how important a range of aspects were to them including religion, arts and culture, sport, Welsh language and Welsh culture and heritage. Welsh language was the issue that most respondents felt was not important at all and the issue that least respondents thought was fairly or very important. However Welsh culture and heritage was identified as being fairly or very important to a high number of respondents. It is interesting to note that the survey was live during Wales' Euro 2016 football campaign.

Maximising Opportunities and Attainment – Where we need to increase our evidence base?

The well-being assessment must be seen as an on-going process of better understanding our communities in order to improve our residents' well-being and contribute to achieving the national well-being goals. The PSB will consider how it can ensure our evidence base can be kept 'live' and become a dynamic resource for everyone.

We will also continue to enhance the findings presented in this section of the assessment and recognise that further information is needed in relation to the following, either because robust data is unavailable at the present time or because analysis is still on-going.

- We have identified that some areas experience lower levels of educational attainment, and lower incomes and employment levels. More evidence is being collected to understand the experiences of those who are experiencing financial exclusion such as food and fuel poverty and access to mainstream finance products.
- Digital skills and access is an area where relatively little evidence and data exists at a local level.
- Data and evidence on cultural well-being is currently focused on a more traditional definition of cultural well-being. We recognise that the meaning of culture can be very different to different population groups and more research would be needed to understand this.
- Updated educational attainment comparisons to areas of England would help identify how the Vale is currently performing in relation to those areas of a similar socio-economic profile. Further research would also be needed to examine the trends we can expect to observe in the future when comparing to areas in other countries particularly given the recent 2016 PISA results for Wales.
- Evidence in relation to traffic volumes on the Vale's road network and the pressures that could arise from any future developments in terms of road congestion and the affects on air and noise pollution.
- More local evidence in relation to the impact of poor health on economic well-being.
- More local evidence in relation to agriculture and the rural economy in the Vale of Glamorgan.

Our Findings

Education – Our Findings

In order to ensure our population are given the best possible chance to maximise their opportunities having a good education is of up most importance. Education acts as the key foundation for the economic success of not only individuals but of the area as well. It has been stated that "educational attainment has the largest impact on the likelihood of being in poverty and severely materially deprived as an adult…holding all else equal, in the UK, those with a low level of education attainment are almost five times as likely to be in poverty now and 11 times as likely to be severely materially deprived as those with a high level of education".[1]

At a national level, the Welsh Government Understanding Wales' Future[2] report highlights that Wales is under-performing internationally in educational attainment, which has implications for the economy, health and the general life chances of our people. Therefore, although our analysis of education attainment compares success in the Vale of Glamorgan to the Welsh average it is important to consider that the Welsh average may not be the best comparator. Our ambition is that education outcomes in the Vale of Glamorgan are the best in Wales and match those of the most successful authorities in England with similar socio-economic profiles.

The impact of education at a young age cannot be underestimated. Understanding Wales' future highlights how international evidence suggests the biggest opportunities for changing life chances lie in the pre-school years with the factors that lead to educational under-attainment starting very early in childhood. The report demonstrates the links between level of cognitive skills and socio-economic background. The impact of a child's socio-economic status on cognitive development and resulting life chances are clear and demonstrates the importance of success in the early years, not only for the generation themselves but the impact this will have on the socio-economic circumstances their children's generation.

The Foundation Phase Assessment for 4-5 year olds is made up of four Areas of Learning – Personal and Social Development; Language, Literacy and Communication; Mathematical Development; and Physical Development. In 2015/16 in the Vale of Glamorgan the percentage of children reaching the expected outcome or above across all of these areas of development combined was 91.2%. This was the highest across the Central South Education Consortium Area and was the 2nd highest in Wales behind Monmouthshire (91.7%).

[1] http://webarchive.nationalarchives.gov.uk/20160105160709/http://www.ons.gov.uk/ons/rel/household-income/intergenerational-transmission-of-poverty-in-the-uk---eu/2014/blank.html

[2] http://gov.wales/statistics-and-research/understanding-wales-future/?lang=en

Children are also assessed at the end of the Foundation Phase (aged 7) and the percentage reaching the expected level of development is again above average with the Vale of Glamorgan having the second highest percentage across Wales. The percentage of children in need reaching the expected outcome at the foundation phase assessment was also higher than the Welsh average.

Within the Vale of Glamorgan there are 45 local authority primary schools and 7 secondary schools. Class sizes in the Vale of Glamorgan are slightly larger than average and the percentage of pupils who are eligible for free school meal is below average. For the 2015-16 academic year, school attendance remained in the top quartile of performers in Wales for both secondary and primary schools.

For the 2015/16 academic year 67.1% of pupils aged 15 in the Vale achieved the Level 2 threshold, 5 GCSEs at grade A*-C including a GCSE grade A*-C in English/ Welsh First Language and Maths. The Welsh average was 60.3%. However, inequalities exist within the Vale of Glamorgan with levels of attainment lowest in the most deprived areas of the Vale. This is further evidenced in the achievement gap between pupils in the Vale in receipt of free school meals and those who are not. One of the Council's 2015-16 improvement objectives was to reduce the achievement gap between pupils in receipt of free school meals and those who are not. The performance of pupils entitled to free school meals has improved since 2012, albeit not always at the same rate as their peers. The achievement gap at KS4 slightly narrowed for the 2015-16 academic year, however reducing this gap further remains a key focus for improvement and a priority for Council in the long term.

Previous analysis undertaken through the 2015 Vale of Glamorgan Tackling Poverty Report[3] found there was no link between travel to school times and pupil attendance rates. As stated school attendance rates in the Vale are amongst the highest in Wales with attendance at school influencing attainment levels. The analysis in relation to travel times to school having no influence over attendance levels is supported by analysis of achievement levels with areas in the Western Vale having some of the highest achievements levels despite pupils in these areas having some of the longest travel times to school due to the rural nature of the area.

Although overall the Vale of Glamorgan performs well above average across the key stages, it is important to consider that we should be aiming to be on par with English authorities of similar socio-economic profiles. Previous analysis undertaken by the Local Government Data Unit identified a 'family' of local authorities of similar socio-economic profile to the Vale of Glamorgan – Flintshire, East Sussex, Norfolk and Solihull. Previous analysis undertaken in 2013 showed that when considering teacher assessments at KS2 and KS3 the Vale performed either in line or above the authorities within this 'family'. However, at KS4

[3] LGDU Vale of Glamorgan Tackling Poverty Report 2015

performance in the Vale of Glamorgan was below that of the English authorities within this group although care must be taken when comparing these figures due to differences in examination arrangements. Further work would be required to undertake this analysis using the most recently available data.

The Understanding Wales' Future Report identified that pupils in Wales feel much more pressured by school work than 15 year olds in other countries with higher attainment. Pupils across the Cardiff and Vale Health Board area were in line with the Welsh average when asked whether they felt pressured by the school work they had to do. The percentage of pupils in the Cardiff and Vale region who reported liking school a lot was above Welsh average although only 26% of pupils reported doing so. The 2013 Vale of Glamorgan School Pupil Needs Assessment asked a range of questions in relation to how pupils felt about school and their preferred methods of learning. A survey is currently being undertaken throughout schools in the Vale which asks a range of similar questions, the findings of which will be available in the Spring 2017.

Selfie (Social and Emotional Learning for Improvements elsewhere) is a unique web based system, developed through collaboration between the University of Sussex, the Vale of Glamorgan Council and the software developer Viewpoint.

A number of Vale schools are currently involved and each school can decide to survey the whole school or to pick individual year groups. The survey looks at two areas, 'my feelings' and 'my class'. The survey helps to gain an insight into the social and emotional climate of the school from the perspective of all members of the school community.

From the results staff can identify

- those pupils who need additional support and target interventions
- areas that the school is strong
- areas for development
- differences in the perceptions between staff and pupils

Since the introduction of SELFIE in October 2015, in excess of 9000 children in Vale schools have been surveyed. This has helped identify children with lower levels of well-being and helped target action plans to improve their well-being. It has been possible to identify whole school issues with bullying, worry, and social experience, and work with head teachers to explore this further.

Over the coming year an on-line assessment system will be used to help establish how pupils feel about themselves and others. The information will be used to help plan what schools can do to improve all pupils' well-being. This will include linking the pupils' responses with other information such as attainment, attendance, FSM status, SEN status, EAL status, ethnicity and first language. This will help identify if there are any patterns within schools which will help to improve pupils' well-being, learning and attendance and whether some pupils would benefit from extra support.

The 2016 Schools Super Survey also asked children and young people in the Vale a range of questions regarding how they feel about the future. The survey asked pupils to consider how confident they felt that they would get a job after leaving school/ college. Of the 943 responses to this question, 85% were either fairly or very confident about finding a job in the future.

We have already highlighted that education is of crucial importance for social and economic outcomes and at a national level, Wales has relatively low post-16 staying on rates when compared to other countries. In the Vale of Glamorgan the percentage of year 11 pupils who become NEET continues to decrease year on year and remains below the Welsh average for 2015-16. The Vale has performed well at all age groups for 2015/16 with 1.5% of year 12 leavers NEET compared to the Welsh average 1.6% . At year 13, 2.92% of leavers were NEET in the Vale compared to the Welsh average of 3.76%. The Youth Engagement and Progression Framework has been implemented and provision brokered using intelligence from the early identification tool. This has resulted in targeted interventions being successful and young people 16-18 making successful transitions into EET.

Educational attainment can not only influence an individual's own opportunities but impacts on children's development and learning. National level data collected through the National Survey for Wales showed that parents qualified to NQF level 4 or above were 20% more confident in their own writing skills to help children with their writing than those without any qualifications. Similarly those qualified to NQF level 4 or above were 22% more confident in their maths ability to help children with their maths work than those without a qualification. The Vale has a lower than average percentage of the adult population with no qualifications and a higher than average percentage of the population qualified at NQF level 4 and above, either a degree or equivalent. When considered by gender the Vale had the highest percentage of males qualified to level 4+ in Wales and the 3rd highest percentage for females.

Again differences can be observed within the Vale of Glamorgan with Census 2011 data showing there are clear differences within the Vale with more adults in the Barry area (25.5%) having no qualifications than in the Eastern Vale (17.9%) and Western Vale (16.3).

A range of programmes are in place in order to increase skills amongst adults including Adult and Community Learning courses. When considering the location of Welsh Government funded ACL skills and employability course venues from the 'Get Back on Track' programme in the Vale of Glamorgan, venues are located in the most deprived areas of the Vale as according to WIMD 2014 with the aim of improving skills within our more deprived communities where levels of adult qualifications tend to be lower.

Education – Our Evidence

> *"Educational attainment has the largest impact on the likelihood of being in poverty and severely materially deprived as an adult... Holding all else equal, in the UK, those with a low level of educational attainment are almost five times as likely to be in poverty now and 11 times as likely to be severely materially deprived as those with a high level of education."*

Intergenerational transmission of disadvantage in the UK & EU, ONS 2014

The Understanding Wales' Future Report shows that at a national level Wales is under-performing in educational attainment, which has implications for the economy, health and the general life chances of our people. This was emphasised by the 2016 PISA results which showed that Wales performs below England, Scotland and Northern Ireland.

The Understanding Wales' Future Report highlights that:

•Neither expenditure nor socio-economic circumstances can explain this.

•We need to shift the whole distribution curve of attainment upwards, *and* also target help on those at the bottom end: the same as the Marmot message on health.

•The largest proportionate gains (but not necessarily the easiest) are likely to come at the bottom end.

•Gaps in development between children from affluent and deprived families are already marked by the age of 3: international evidence suggests the biggest opportunities for changing life chances lie in the pre-school years, although action at every stage of a child's life is important.

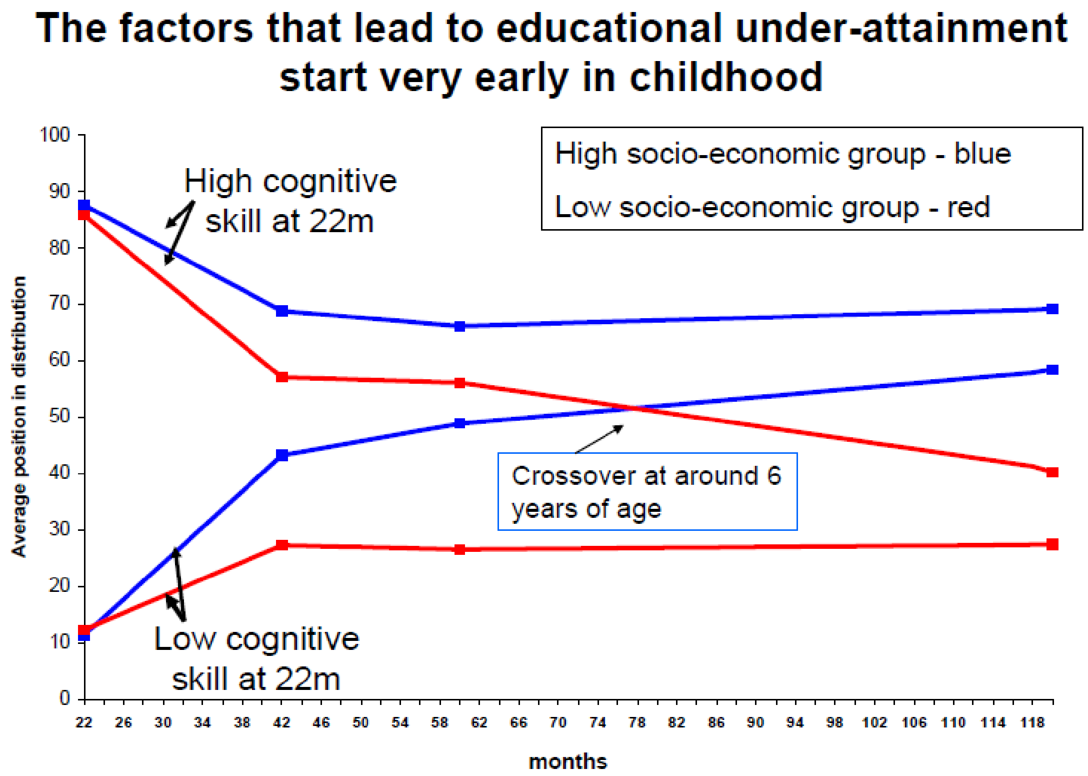
•Fewer young people from poor backgrounds go on to Higher Education, but this is largely due to their general school attainment.

Wales is more reliant on overseas students than Higher Education in most UK regions: this presents a vulnerability and an opportunity. We need to consider impact of the 2016 EU Referendum results.

The evidence presented below sets out the findings for the Vale of Glamorgan in relation to educational attainment and the effects this can have on well-being**.**

Early Years

International evidence suggests that the biggest opportunities for changing life chances lie in the pre-school years.



Source: Feinstein (2003) 'Inequality in the Early Cognitive Development of British Children in the 1970 Cohort', *Economica*

B.4.1

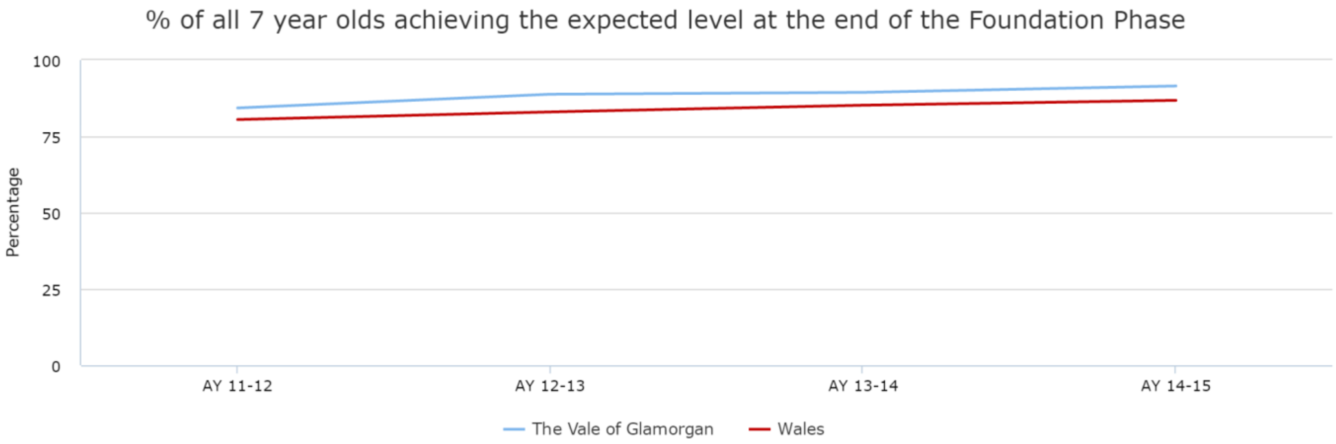
The Foundation Phase Assessment for 4-5 year olds was introduced for the academic year 2015/16 and assesses the development of children in Reception Year. It is made up of four areas of learning – Personal and Social Development (PSD); Language, Literacy and Communication (LLC); Mathematical Development (MD); and Physical Development (PD). The Foundation Phase Indicator is used to demonstrate the percentage of children reaching the expected outcome (outcome 5 or above) of development in PSD, LLC and MD combined.

In 2015/16 in the Vale of Glamorgan the percentage of children reaching the expected outcome or above across all of these areas of development combined was 91.2%. This was the highest across the Central South Education Consortium Area and was the 2nd highest in Wales behind Monmouthshire (91.7%). Slight differences can be observed when breaking the percentage reaching the expected outcome down by area of learning, with the Vale of Glamorgan ranking 1st for the percentage reaching the expected outcome for Mathematical Development. The lowest percentage reaching the expected outcome in the Vale was observed in the Language Literacy and Communication area and this is a trend that is also observed in other areas of Wales. In addition, within the LLC area of learning, a higher percentage reach the expected level of development for Welsh as opposed to English both in the Vale of Glamorgan and across other areas of Wales.

Differences can also be observed by gender. For boys, the area of learning where the highest percentage reached the expected outcome was PSD with 95.3% reaching this level, the 2nd highest in Wales. For MD, 93.4% of boys reached the expected outcome, the highest in Wales. Levels reaching the expected outcome in LLC were lower than the other areas of learning for boys.

For girls the area of learning where the highest percentage reached the expected outcome was also PSD with 98% reaching this level. However, as opposed to boys, for girls the percentage reaching the expected outcomes for LLC in English and Welsh was in line with the percentage reaching the expected outcomes for MD.

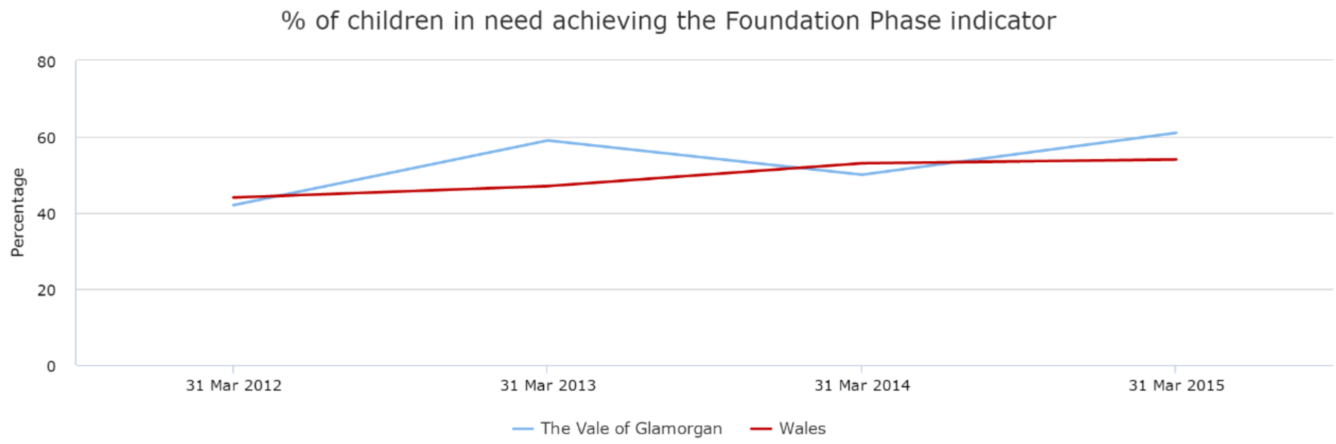
Children are also assessed at the end of the Foundation Phase aged 7.



	The Vale of Glamorgan	Wales
AY 11-12	84.3	80.5
AY 12-13	88.8	83.0
AY 13-14	89.4	85.2
AY 14-15	91.5	86.8

Source: Welsh Government (WG)

Figures show the Vale remains above Welsh average for academic year 2015-16 with 91.2% of 7 year olds achieving the expected level – the 2nd highest in Wales.



	The Vale of Glamorgan	Wales
31 Mar 2012	42	44
31 Mar 2013	59	47
31 Mar 2014	50	53
31 Mar 2015	61	54

Source: Welsh Government (WG)

The percentage of children in need achieving the Foundation Phase Indicator in the Vale of Glamorgan is also above the Welsh average.

At a local authority level, for 2012/13, the difference between seven year olds achieving the expected level at the end of the Foundation Phase entitled to Free School Meals (FSM) and not entitled to FSM was 21.5 percentage points. This was the second highest gap for local authorities in Wales. This supports earlier evidence in relation to cognitive development and the influence of socio-economic factors. Narrowing the gap in attainment between FSM and non-FSM pupils has been a focus for the local authority in recent years and was set as an improvement objective. In the 2015-16 academic year the gap at the Foundation Phase was 13.7%.

Schools Aged Pupils

The below tables set out a range of key statistics in relation to pupils in the Vale of Glamorgan.

Usual resident population of school age		
	The Vale of Glamorgan	**Wales**
Number of people aged 3 - 4 (30 Jun 2015)	3,061	73,470
Number of people aged 5 - 10 (30 Jun 2015)	9,265	213,626
Number of people aged 11 - 15 (30 Jun 2015)	7,246	165,741
Number of people aged 16 - 19 (30 Jun 2015)	6,073	151,380

Source: Office for National Statistics

Key data for primary schools		
	The Vale of Glamorgan	**Wales**
Number of primary schools (AY 15-16)	45	1,310
Number of pupils in primary schools (AY 15-16)	12,575	276,954
Primary school pupil teacher ratio (AY 15-16)	20.9	21.6
Average KS2 class size in primary schools (AY 15-16)	25.9	25.7
% of half day sessions missed in primary schools due to all absences (AY 14-15)	4.7	5.1
% of primary school pupils who are eligible for free school meals (AY 15-16)	11.8	17.3

Source: Welsh Government

Key data for secondary schools		
	The Vale of Glamorgan	**Wales**
Number of secondary schools (AY 15-16)	7	205
Number of pupils in secondary schools (AY 15-16)	8,104	178,669
Secondary school pupil teacher ratio (AY 15-16)	16	16.3
Average size of year 7-11 classes in secondary schools (AY 15-16)	22.8	21.8
% of half day sessions missed in secondary schools due to all absences (AY 15-16)	5	5.8
% of secondary school pupils who are eligible for free school meals (AY 15-16)	11.8	15.6

The Vale has one of the largest average class sizes for year 7-11. When considering the high educational attainment results achieved in the Vale, this may suggest that socio-economic factors have a bigger influence over attainment than class sizes.

Attainment

For the 2015/16 academic year 67.1% of pupils aged 15 in the Vale achieved the Level 2 threshold, 5 GCSEs at grade A*-C including a GCSE grade A*-C in English/ Welsh First Language and Maths. The Welsh average was 60.3%.

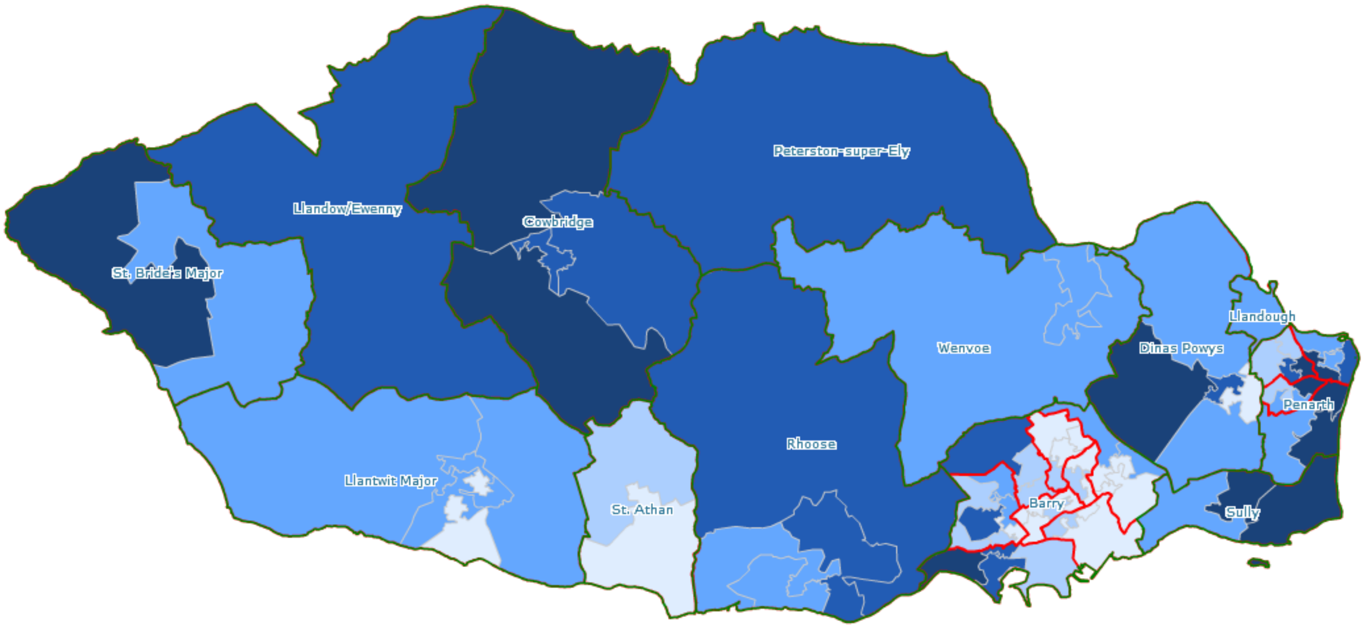
Overall the Vale performs well at all key stages in relation to educational attainment. Based on eligibility from FSM, the Vale of Glamorgan's indicative ranking for educational attainment is 5th in Wales,that is that the Vale would be expected to have the 5th best performance for attainment indicators in Wales based upon the number of FSM eligible pupils in the cohort. The Vale performed above 5th for all indicators across all key stages in the 2015-16 academic year.

Although overall the Vale of Glamorgan performs well above average across the key stages, it is important to consider that we should be aiming to be on par with English authorities of similar socio-economic profiles. This is emphasised by the 2016 PISA results which showed that Wales lags behind England, Scotland and Northern Ireland with regards to educational attainment and therefore comparing the Welsh average cannot always be considered an indication of excellent performance. Previous analysis undertaken by the Local Government Data Unit identified a 'family' of local authorities of similar socio-economic profile to the Vale of Glamorgan – Flintshire, East Sussex, Norfolk and Solihull. Previous analysis undertaken in 2013 showed that when considering teacher assessments at KS2 and KS3 the Vale performed either in line or above the authorities within this 'family'. However, at KS4 performance in the Vale of Glamorgan was below that of the English authorities within this group although care must be taken when comparing these figures due to differences in examination arrangements. Further work would be required to undertake this analysis using the most recently available data.

Although the Vale performs well when educational attainment is considered at a local authority level, as has been the case throughout this assessment, inequalities exist within the Vale of Glamorgan with levels of attainment lowest in the most deprived areas of the Vale.

Average point score at Key Stage 2 is included as a Welsh Index of Multiple Deprivation (WIMD) indicator. Average point scores for pupils in KS2 are assessed by teachers in Year 6 (final year of primary school). A 3-year average is used to reduce the impact of having small numbers of pupils at LSOA level. Because not all children are assessed in Welsh as a first language at Key Stages 2 and 3, the highest score in English and Welsh was taken along with the score in Mathematics and Science, to provide comparability across Wales. The indicator only includes maintained schools.

The map below shows this indicator for the Vale with the darker areas showing a higher average point score. The map shows that attainment is lower in the more deprived areas particularly to the east of Barry and pockets in St Athan and Llantwit Major.



The areas with the lowest attainment levels at Key Stage 4 are very similar to those areas of greatest overall deprivation, as measured by WIMD 2014. All 4 of the LSOAs in the Vale which are in the 10 most deprived LSOAs as measured by WIMD 2014 are also included in the 5 LSOAs in the Vale with the lowest levels of attainment.

The inequalities found within the Vale of Glamorgan are also shown by the difference in attainment levels between those pupils eligible for Free School Meals and those who are not. At a local authority level, for 2012/13, the difference between seven year olds achieving the expected level at the end of the Foundation Phase entitled to FSM and not entitled to FSM was 21.5 percentage points. This was the second highest gap for local authorities in Wales. A large gap in attainment was also found at other key stages and the Vale of Glamorgan Council therefore made narrowing this difference one of it’s improvement objectives.

In all the main performance indicators across all phases, the performance of pupils entitled to free school meals has improved since 2012, albeit not always at the same rate as their peers. Since 2012, in the Foundation Phase and at key stage 3, the performance of pupils entitled to free school meals in the authority has improved at a greater rate than that of their peers. This has narrowed the difference in performance between pupils entitled to free school meals when compared with their peers.

It is recognised however that the standards achieved by children entitled to free school meals do not yet meet those of other children in all key stages and the level of exclusions needs to reduce and these remain a key focus for improvement and a priority for Council in the long term.

The difference in the Foundation Phase Outcome Indicator (FPOI) performance for those pupils entitled to free school meals (eFSM) and those that are not (non FSM) was 13.7% in the 2015-16 academic year, a large decrease from 2012. In addition:

- The difference in the Core Subject Indicator (CSI) performance between eFSM and non FSM at KS2 has decreased to 17.3% to 14% for the 2015-16 academic year.

- The gap between eFSM and non FSM at KS3 increased slightly for the 2015-16 academic year although the performance for FSM eligible pupils is rapidly increasing and this widening gap is therefore attributed to the performance of non-FSM pupils also increasing.

- At KS4, for the level 2+ threshold, the difference in performance between eFSM and non FSM shows a marginal narrowing.

- Based on eligibility from FSM, the Vale of Glamorgan's indicative ranking for educational attainment is 5th in Wales,that is that the Vale would be expected to have the 5th best performance for attainment indicators in Wales based upon the number of FSM eligible pupils in the cohort. The Vale performed above 5th for all indicators across all key stages in the 2015-16 academic year.

Attainment of children in need in the Vale of Glamorgan

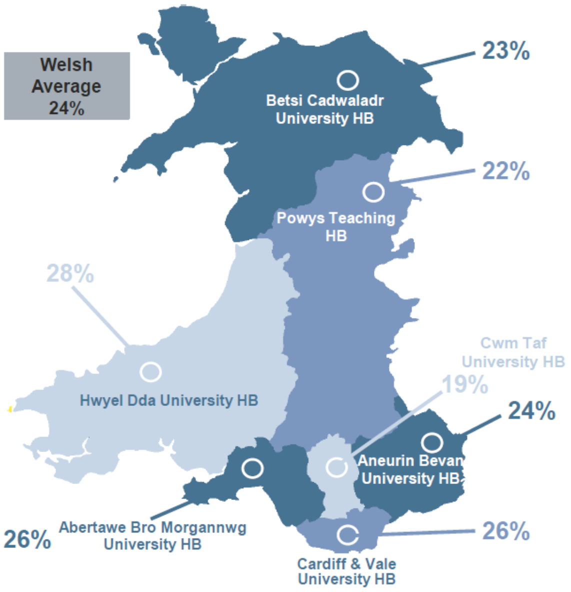
At March 2016, 65% of children aged 16 in the Vale of Glamorgan in care left care with at least one qualification. 35% left care with no qualifications although it should be recognised that these percentages are based on low overall numbers.

Children in Need	2010	2011	2012	2013	2014	2015
Percentage of children achieving the foundation phase indicator	..	..	42	59	50	61
Percentage of children achieving the core subject indicator at key stage 1	50	61	..	..	..	..
Percentage of children achieving the core subject indicator at key stage 2	33	54	58	56	50	67
Percentage of children achieving the core subject indicator at key stage 3	29	15	35	32	45	46
Percentage of children achieving the level 1 threshold	50	55	59	48	74	74
Percentage of children achieving 5 or more GCSE passes at A*-G	47	43	51	36	58	37
Percentage of children achieving the level 2 threshold	15	24	41	30	58	48
Percentage of children achieving the level 2 threshold including English/Welsh and Mathematics	*	14	17	15	*	22
Percentage of children achieving 5 or more GCSE passes at A*-C	*	14	27	*	*	19
Percentage of children achieving the core subject indicator at key stage 4	*	14	17	*	*	22

Feelings about school

Children in the Cardiff and Vale UHB area are more likely to say they like school than other areas.

How do you feel about school at present?



% Like a lot

	Boys	Girls
Abertawe Bro Morgannwg	25%	27%
Aneurin Bevan	27%	21%
Betsi Cadwaladr	22%	23%
Cardiff & Vale	28%	24%
Cwm Taf	18%	19%
Hwyel Dda	23%	33%
Powys	19%	24%

Base: *All respondents aged 11 to 16 stating an answer surveyed between November 2013 and March 2014 (8,934)*

Source: Ipsos MORI

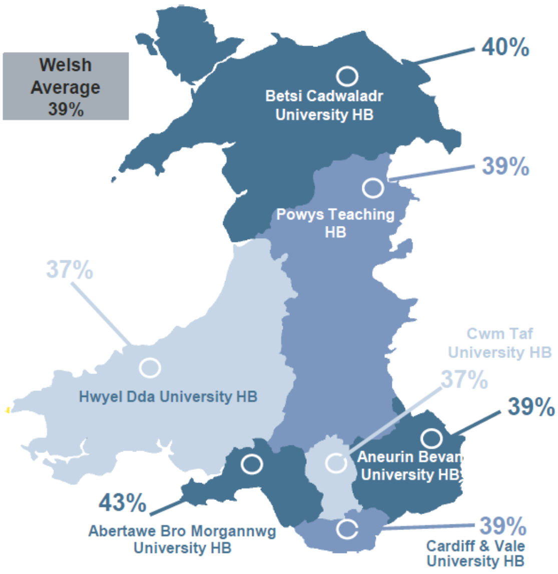
There is a statistically significant relationship between liking school a lot and LHB

Ipsos MORI
Public Affairs Slide 173

Source: Health Behaviours in School Aged Children

However the Understanding Wales' Future Report identified that pupils in Wales feel much more pressured by school work than 15 year olds in other countries with higher attainment.

How pressured do you feel by the schoolwork you have to do?



% Lot/some

	Boys	Girls
Abertawe Bro Morgannwg	38%	47%
Aneurin Bevan	34%	43%
Betsi Cadwaladr	35%	46%
Cardiff & Vale	32%	45%
Cwm Taf	33%	43%
Hwyel Dda	33%	42%
Powys	37%	41%

Base: *All respondents aged 11 to 16 stating an answer surveyed between November 2013 and March 2014 (8,929)*

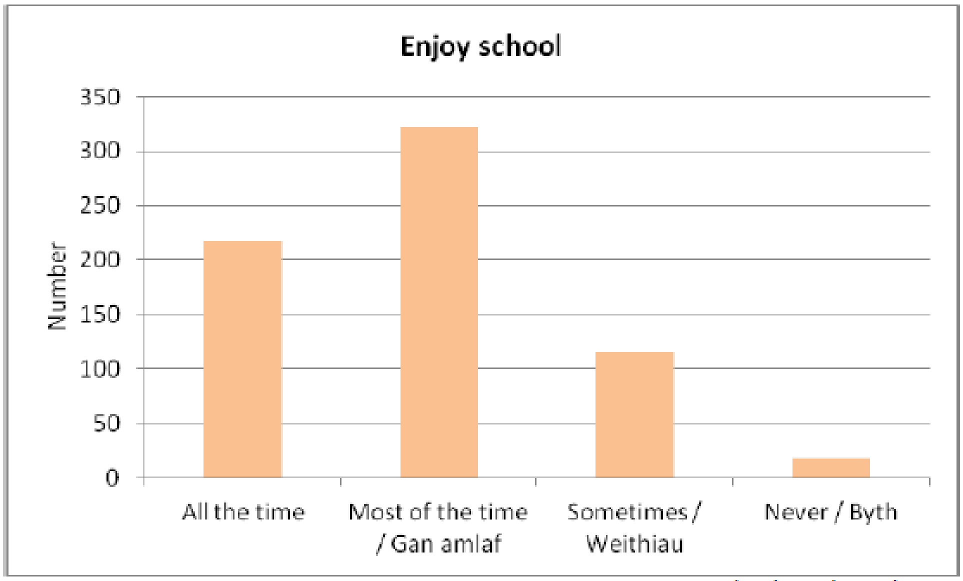
Source: Ipsos MORI

At a Vale of Glamorgan level, the surveys used to inform the School Pupil Needs Assessment 2013 asked pupils a range of questions regarding how they felt about school with regards to making transitions between schools, what they enjoy about school and their preferred methods of learning.

Primary school pupils were asked how they felt about starting their new school and most pupils stated that it was 'fun' or 'scary'. A high number of pupils also stated that they cannot remember and this may because they are older pupils which make up the majority of pupils completing the survey. With regards to what had helped them settle at their new school, the most common answer for primary school pupils was that they had 'made new friends' followed by a 'teacher helped me'.

With regards to secondary school pupils, 916 (72%) pupils stated that the transition to secondary school was easy or very easy. 182 (14%) found it difficult and 79 (6%) found it very difficult. Help making new friends, visiting and being shown around the school before hand and getting to know the teachers were stated as the methods of support given during the transition from primary to secondary school and were also stated as things that would have helped to make the transition easier.

The table below shows the responses given by primary school pupils in relation to whether they enjoy school.



Source: School Pupil Needs Assessment 2013

Primary school pupils were also asked to state what the best and worst things about school were. Friends (including making new friends), playtime and learning new things were given as the top three best things about school and boring lessons/subjects, falling out with friends/having arguments and Maths were given as the top three worst things about school.

Secondary school pupils were asked about the options available to them and 733 (59%) pupils stated they were able to choose the options they wanted for learning or training, 222 (18%) had not been able to choose all the options they wanted. Regarding whether secondary school pupils were able to attend their preferred places of learning, there was an almost equal divide between those able to go to their preferred place of learning and those who were unable to.

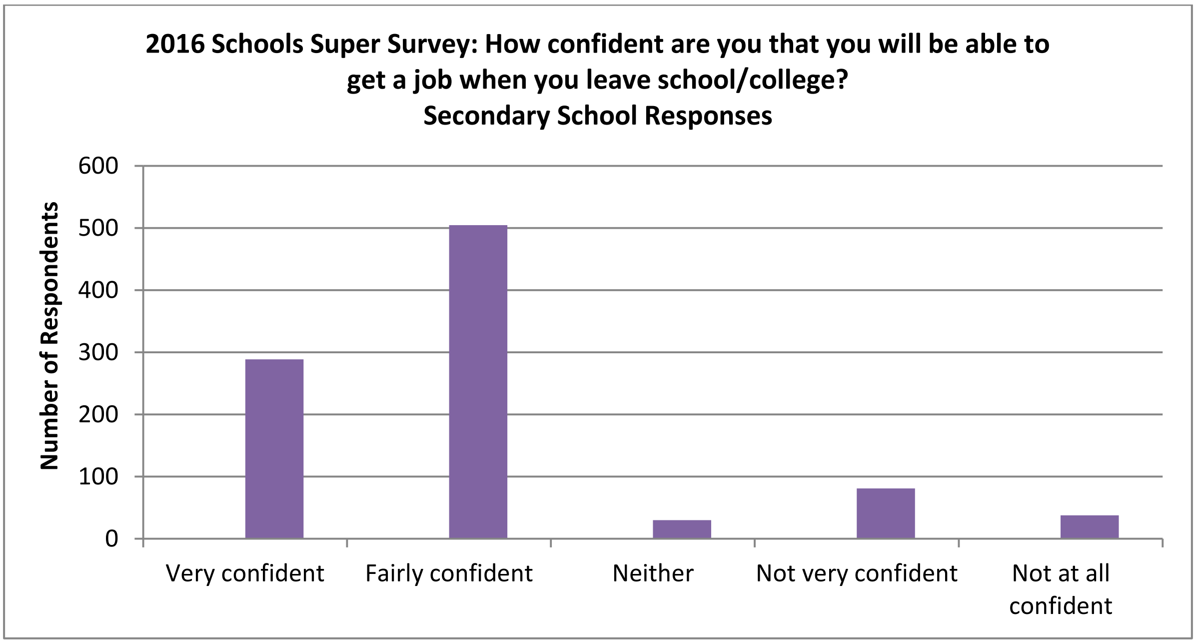
338 pupils (27%) stated they were not doing what they wanted in terms of education training or work, while 588 (48%) stated they were mostly doing what they wanted with 309 (25%) definitely doing what they wanted.

199 pupils (16%) stated that they have don't have individual help with school training or work, 270 (22%) stated they had not much help, and 324 (26%) stated that they didn't need help.

Secondary school pupils were also asked what their preferred methods of learning were. 'Writing things down' and 'listening to someone' were the most common answers.

An updated version of the survey was undertaken in 2016 (Schools Super Survey) and detailed results in relation to the above are currently being analysed. The updated data will be included here once available.

The 2016 Schools Super Survey also asked children and young people in the Vale a range of questions regarding how they feel about the future. The survey asked pupils to consider how confident they felt that they would get a job after leaving school/ college. Of the 943 responses to this question, 85% were either fairly or very confident about finding a job in the future.



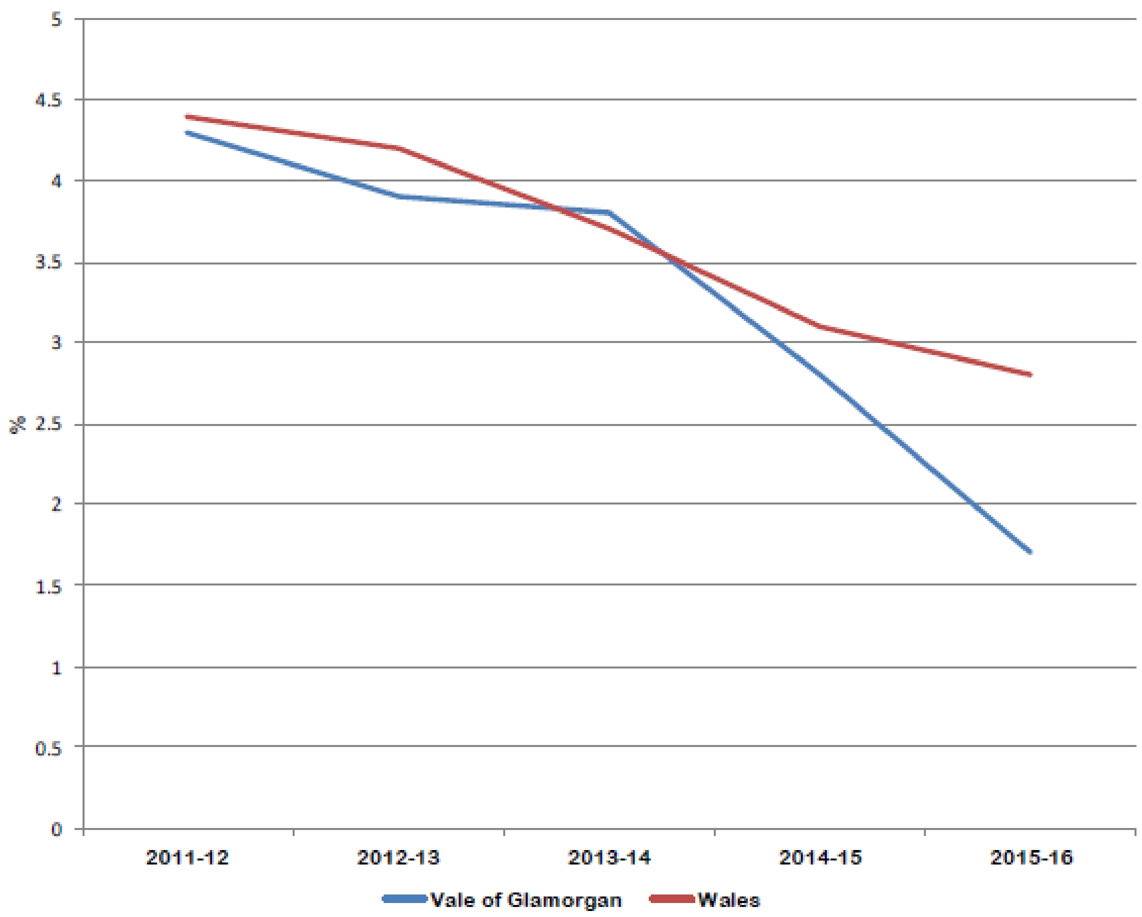
Source: 2016 Schools Super Survey

NEETs

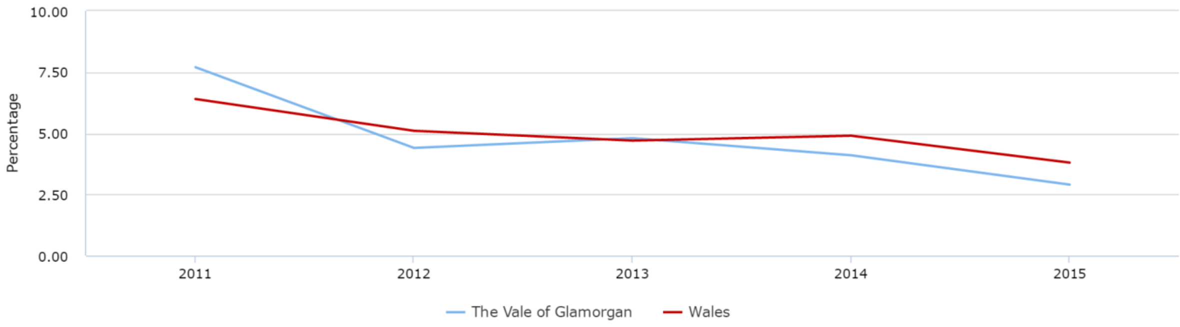
Education is of crucial importance for social and economic outcomes and internationally, Wales is below the OECD average in terms of adult qualification levels with post-16 staying on rates are comparatively low internationally.

In the Vale of Glamorgan the percentage of year 11 pupils who become NEET continues to decrease year on year and remains below the Welsh average for 2015-16. The Vale has performed well at all age groups for 2015/16 with 1.5% of year 12 leavers NEET compared to the Welsh average 1.6%. At year 13, 2.92% of leavers were NEET in the Vale compared to the Welsh average of 3.76%. The Youth Engagement and Progression Framework has been implemented and provision brokered using intelligence from the early identification tool. This has resulted in targeted interventions being successful and young people 16-18 making successful transitions into EET. The Community Strategy Delivery Plan 2014-18 focuses on tackling poverty and contains a range of actions to continue to decrease the level of NEETs in the Vale.

Percentage of year 11 leavers known not to be in education, employment or training



% of Year 13 school leavers that are NEET (known not to be in employment, full time education or work based training for young people)



	The Vale of Glamorgan	Wales
2011	7.7	6.4
2012	4.4	5.1
2013	4.8	4.7
2014	4.1	4.9
2015	2.9	3.8

Source: Careers Wales

Adult Skills

The level of qualifications held by adults not only influences an individual's own opportunities for employment but can impact on their children's development and learning and subsequent future employment and well-being. National level data collected through the National Survey for Wales showed that parents qualified to NQF level 4 or above were 20% more confident in their own writing skills to help children with their writing than those without any qualifications. Similarly those qualified to NQF level 4 or above were 22% more confident in their maths ability to help children with their maths work than those without a qualification.

The following graphs show that there are a higher percentage of adults with high level qualifications in the Vale of Glamorgan compared to the Welsh average. In addition there is a lower than average percentage of adults with no qualifications.

The below guide shows the definition of each qualification level.

Level 1 qualifications:

- 1-4 O Levels/CSE/GCSEs (any grades);
- Entry Level Foundation Diploma;
- NVQ level 1;
- Foundation GNVQ; or;
- Basic/Essential Skills.

Level 2 qualifications:

- 5+ O Level (Passes)/CSEs (Grade 1)/GCSEs (Grades A*-C);
- School Certificate;
- 1 A Level/ 2-3 AS Levels/VCEs;
- Intermediate/Higher Diploma;
- Welsh Baccalaureate Intermediate Diploma;
- NVQ level 2;
- Intermediate GNVQ;
- City and Guilds Craft;
- BTEC First/General Diploma; or
- RSA Diploma Apprenticeship.

Level 3 qualifications:

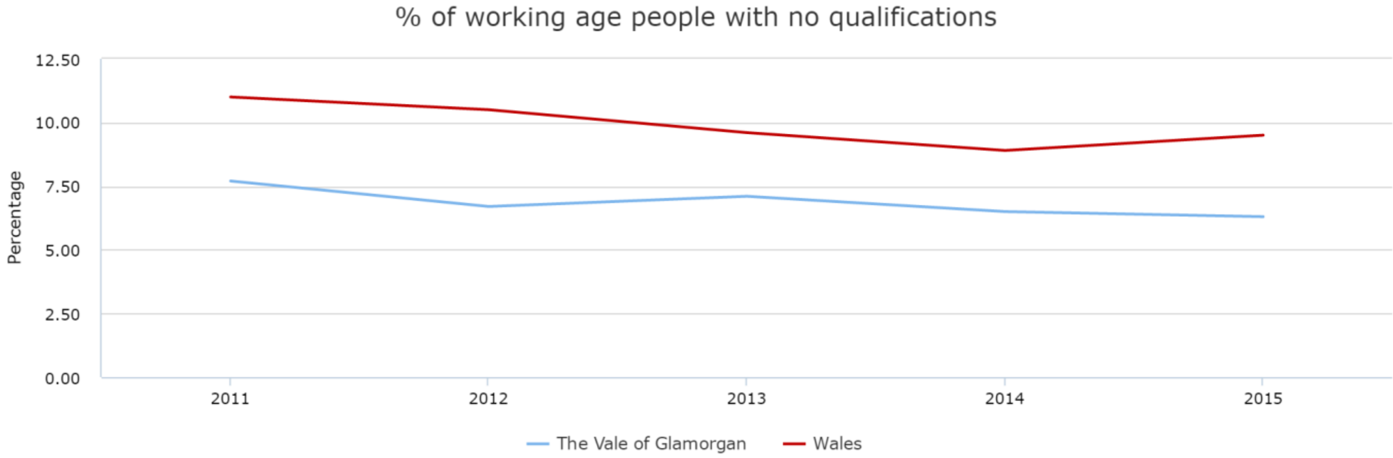
- 2+ A Levels/VCEs;
- 4+ AS Levels;
- Higher School Certificate;
- Progression/Advanced Diploma;
- Welsh Baccalaureate Advanced Diploma;
- NVQ Level 3;
- Advanced GNVQ;
- City and Guilds Advanced Craft;
- ONC;
- OND;
- BTEC National; or
- RSA Advanced Diploma.

Level 4+ qualifications:

- Degree (for example BA, BSc);
- Higher Degree (for example MA, PhD, PGCE);
- NVQ Level 4-5;
- HNC;
- HND;
- RSA Higher Diploma;
- BTEC Higher level;
- Foundation degree (NI); or
- Professional qualifications (for example teaching, nursing, accountancy).

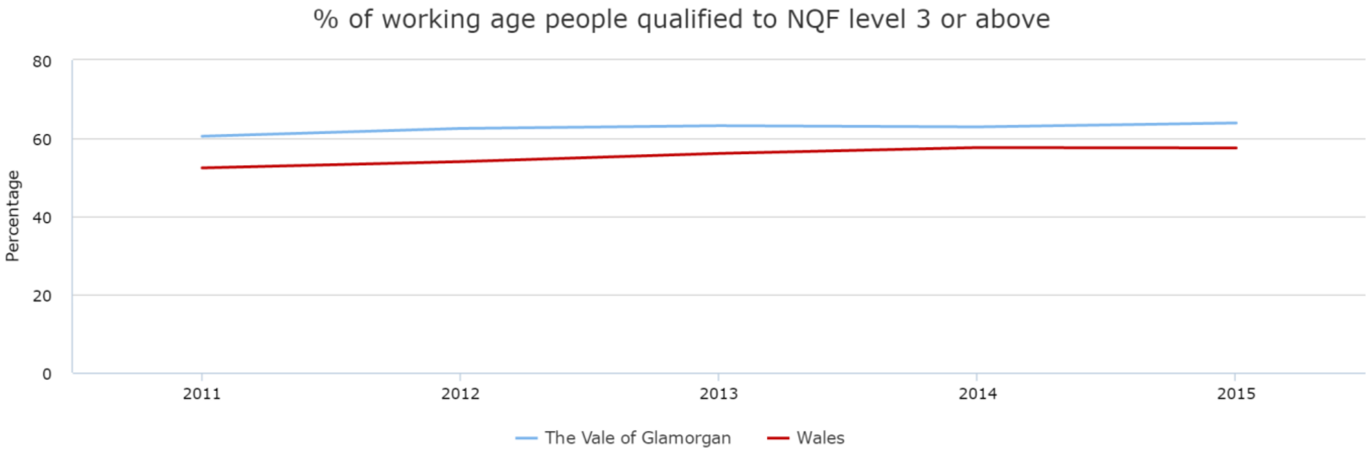
Other qualifications:

- Vocational/Work-related Qualifications; or
- Foreign Qualifications (Not stated/ level unknown).



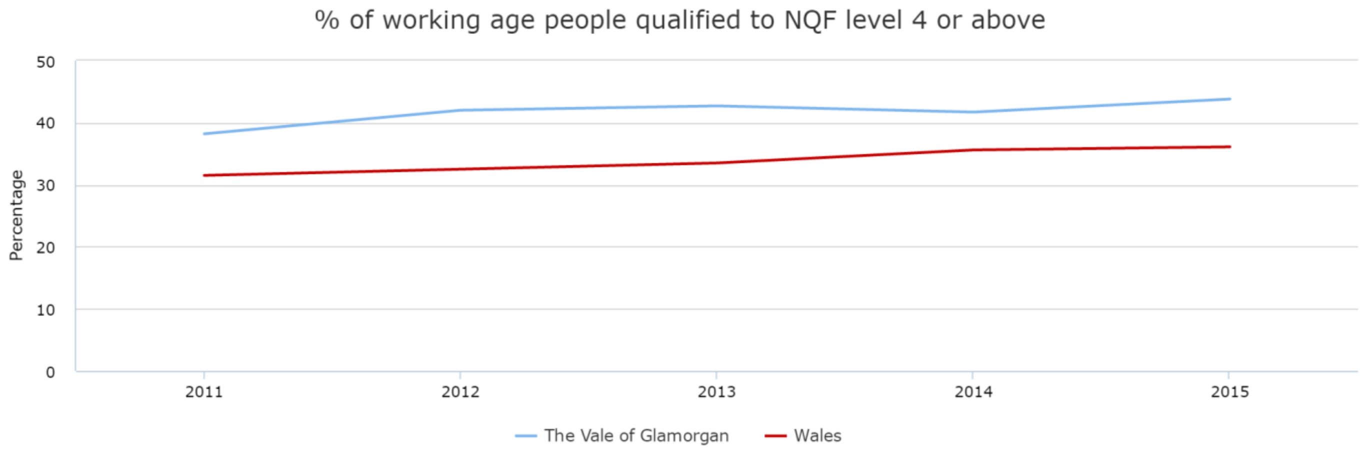
	The Vale of Glamorgan	Wales
2011	7.7	11.0
2012	6.7	10.5
2013	7.1	9.6
2014	6.5	8.9
2015	6.3	9.5

Source: Office for National Statistics (ONS)



	The Vale of Glamorgan	Wales
2011	60.5	52.4
2012	62.5	54.0
2013	63.2	56.1
2014	62.9	57.6
2015	63.9	57.5

Source: Office for National Statistics (ONS)



	The Vale of Glamorgan	Wales
2011	38.2	31.5
2012	42.0	32.5
2013	42.7	33.5
2014	41.7	35.6
2015	43.8	36.1

Source: Office for National Statistics (ONS)

Qualification levels compared to other local authorities by level – males and females aged 16-64

		None	NQF level 2+	NQF level 3+	NQF level 4+
Wales		10.2	76.2	56.6	35.8
North Wales		7.9	77.9	56.9	36.0
North Wales	Isle of Anglesey	8.1	79.4	59.2	37.2
	Gwynedd	7.9	81.4	56.9	37.0
	Conwy	6.8	79.9	59.5	38.5
	Denbighshire	8.0	78.4	58.4	38.2
	Flintshire	7.8	75.4	54.3	32.9
	Wrexham	8.7	75.3	55.9	34.9
Mid Wales		6.9	83.2	62.8	38.1
Mid Wales	Powys	7.1	82.9	61.7	39.2
	Ceredigion	6.5	83.6	64.5	36.4
South West Wales		12.5	73.9	53.5	33.5
South West Wales	Pembrokeshire	10.5	73.1	53.1	33.1
	Carmarthenshire	11.4	76.2	54.2	34.0
	Swansea	12.4	74.6	56.2	35.8
	Neath Port Talbot	15.9	70.3	48.3	29.4
South East Wales		10.7	75.6	57.0	36.3
South East Wales	Bridgend	14.7	70.4	48.1	32.3
	The Vale of Glamorgan	7.0	82.1	63.4	43.4
	Cardiff	8.4	80.4	67.0	45.1
	Rhondda, Cynon, Taff	11.0	72.7	52.2	31.4
	Merthyr Tydfil	14.4	67.9	47.0	27.2
	Caerphilly	12.2	72.7	52.6	30.0
	Blaenau Gwent	20.7	63.9	40.4	21.3
	Torfaen	10.5	73.7	52.5	29.3
	Monmouthshire	6.3	80.9	62.8	44.1
	Newport	10.3	77.7	57.4	36.6

Qualification levels compared to other local authorities by level – males aged 16-64

The Vale of Glamorgan has the lowest percentage of working age males with no qualifications and the second highest percentage of working age males qualified to NQF level 4 or above.

		None	NQF level 2+	NQF level 3+	NQF level 4+
Wales		10.3	75.8	55.9	33.1
North Wales		7.5	78.0	56.2	33.8
North Wales	Isle of Anglesey	8.4	78.5	58.1	33.2
	Gwynedd	8.2	80.7	57.8	36.5
	Conwy	6.6	78.8	56.7	34.2
	Denbighshire	7.4	79.0	58.0	36.5
	Flintshire	7.2	76.9	54.3	33.2
	Wrexham	7.6	75.6	54.7	30.5
Mid Wales		8.1	80.3	61.5	34.0
Mid Wales	Powys	8.5	79.6	61.3	33.9
	Ceredigion	7.4	81.5	61.9	34.2
South West Wales		12.2	74.1	53.1	31.9
South West Wales	Pembrokeshire	10.7	72.5	51.6	30.8
	Carmarthenshire	11.0	76.0	53.3	31.8
	Swansea	12.5	75.8	56.3	35.3
	Neath Port Talbot	14.4	70.0	48.5	26.8
South East Wales		10.9	75.0	56.3	33.3
South East Wales	Bridgend	14.5	68.5	44.5	27.1
	The Vale of Glamorgan	6.0	84.7	65.9	42.6
	Cardiff	8.7	80.0	67.9	42.3
	Rhondda, Cynon, Taff	11.2	71.1	48.9	24.8
	Merthyr Tydfil	15.0	65.9	44.6	22.9
	Caerphilly	11.9	71.8	52.2	28.3
	Blaenau Gwent	20.8	62.9	39.3	19.9
	Torfaen	11.9	73.2	51.5	25.3
	Monmouthshire	6.1	81.9	64.5	44.7
	Newport	12.1	75.4	56.1	35.5

Qualification levels compared to other local authorities by level – females aged 16-64

		None	NQF level 2+	NQF level 3+	NQF level 4+
Wales		10.2	76.7	57.2	38.4
North Wales		8.3	77.9	57.6	38.3
North Wales	Isle of Anglesey	7.9	80.3	60.3	41.2
	Gwynedd	7.5	82.2	55.9	37.6
	Conwy	6.9	80.9	62.2	42.6
	Denbighshire	8.6	77.8	58.7	39.7
	Flintshire	8.5	73.9	54.3	32.6
	Wrexham	9.9	75.1	57.1	39.5
Mid Wales		5.7	86.0	64.0	42.3
Mid Wales	Powys	5.8	86.2	62.1	44.4
	Ceredigion	5.6	85.8	67.2	38.6
South West Wales		12.9	73.6	53.9	35.2
South West Wales	Pembrokeshire	10.3	73.8	54.6	35.4
	Carmarthenshire	11.7	76.4	55.2	36.2
	Swansea	12.4	73.3	56.1	36.3
	Neath Port Talbot	17.4	70.5	48.1	32.0
South East Wales		10.4	76.3	57.6	39.2
South East Wales	Bridgend	14.9	72.2	51.6	37.5
	The Vale of Glamorgan	8.0	79.5	60.9	44.2
	Cardiff	8.1	80.7	66.1	47.9
	Rhondda, Cynon, Taff	10.8	74.3	55.4	37.6
	Merthyr Tydfil	13.9	69.8	49.3	31.3
	Caerphilly	12.5	73.5	53.1	31.7
	Blaenau Gwent	20.5	64.8	41.5	22.7
	Torfaen	9.2	74.2	53.5	33.2
	Monmouthshire	6.6	80.0	61.3	43.6
	Newport	8.4	79.9	58.7	37.6

However, as with a range of other indicators used within this assessment, inequalities in the level of qualification held varies within the Vale of Glamorgan which can impact on opportunities and well-being. The below maps show these difference by each community area used within this assessment and shows that the Barry area has the highest percentage of adults with no qualifications. These areas also show the lowest levels of income and employment showing the clear links between the importance of high educational attainment and future opportunities.

A detailed breakdown by LSOA is also provided in the following tables. These tables clearly show that the LSOAs with the highest percentage of adults with no qualifications are those which are classed as being most deprived.

Percentage of adults with no qualifications (March 2011)

Area	Indicator
Eastern Vale	17.9
Barry	25.5
Western Vale	16.3

Percentage of adults qualified at level 4+

Area	Indicator
Eastern Vale	37.4
Barry	20.1
Western Vale	35.0

Percentage of adults with no qualifications by LSOA (March 2011)

= Lowest 10%	= Highest 10%

LSOA`	% no qualifications
Baruc 1	18.1
Baruc 2	14.9
Baruc 3	24.2
Baruc 4	17.6
Buttrills 1	24.3
Buttrills 2	39.7
Buttrills 3	26.9
Buttrills 4	23.1
Cadoc 1	38.3
Cadoc 2	21.9
Cadoc 3	28
Cadoc 4	30.3
Cadoc 5	28.3
Cadoc 6	14.6
Castleland 1	25.3
Cornerswell 1	18.4
Cornerswell 2	20.6
Cornerswell 3	28.4
Cornerswell 4	19.1
Court 1	27.9
Court 2	29.2
Court 3	34.6
Cowbridge 1	15.4
Cowbridge 2	11.7
Cowbridge 3	11.7
Cowbridge 4	9.5
Dinas Powys 1	11
Dinas Powys 2	15.5
Dinas Powys 3	28.2
Dinas Powys 4	17.3
Dinas Powys 5	15.6
Dyfan 1	19.8
Dyfan 2	28
Dyfan 3	33.1
Gibbonsdown 1	30

LSOA`	% no qualifications
Gibbonsdown 2	41.6
Gibbonsdown 3	32.2
Gibbonsdown 4	33.4
Illtyd 1	16.3
Illtyd 2	28.1
Illtyd 3	17.1
Illtyd 4	21.1
Illtyd 5	18.7
Illtyd 6	16.1
Llandough	18.8
Llandow/Ewenny	13.2
Llantwit Major 1	12.3
Llantwit Major 2	20.4
Llantwit Major 3	14.3
Llantwit Major 4	25.8
Llantwit Major 5	11.4
Llantwit Major 6	23.5
Llantwit Major 7	11.3
Peterston-super-Ely	13.1
Plymouth (The Vale of Glamorgan) 1	11.6
Plymouth (The Vale of Glamorgan) 2	18.8
Plymouth (The Vale of Glamorgan) 3	14.5
Rhoose 1	22.4
Rhoose 2	20.4
Rhoose 3	13.2
Rhoose 4	17
St. Athan 1	30.4
St. Athan 2	16
St. Augustine's 1	16.2
St. Augustine's 2	16.6
St. Augustine's 3	18
St. Augustine's 4	9.9
St. Bride's Major 1	12.1
St. Bride's Major 2	14.3
Stanwell 1	26
Stanwell 2	12.2
Stanwell 3	29
Sully 1	16.4
Sully 2	17.1
Sully 3	14.7

LSOA`	% no qualifications
Wenvoe 1	17.6
Wenvoe 2	20
Castleland 2G	23.2
Castleland 2H	25.7
The Vale of Glamorgan	20.5

Adult and Community Learning

Adult and Community learning courses can offer opportunities for adults to increase their formal qualification levels or learn a new skill to increase employability. Courses may be undertaken at a range of settings including through an employer in work based learning programmes. Additionally adult and community learning courses may be undertaken as a social activity for the learners own enjoyment which can help contribute towards having good well-being.

This table provides the number of learners enrolled at further education (FE) institutions in the Vale of Glamorgan. The data includes work-based learning provision at FE institutions on a consortium member basis and local authority community learning where there is a formal enrolment with an FE institution.

Learner counts are provided on a 'unique learner' basis which uses the unique learner identifier in the underlying data. This eliminates any element of multiple-counting where a learner is enrolled at two or more FE institutions in the academic year. A breakdown by ethnicity, gender and subject of the course is also provided.

Region of domicile				All ages												All ages
				Under 16	16	17	18	19	20 - 24	25 - 39	40 - 49	50 - 59	60 - 64	65 and over	Unspecified	
All areas	Wales	South East Wales region	The Vale of Glamorgan	10	500	560	435	240	590	1,080	445	315	70	85	5	4,330

Breakdown by ethnicity:

White:

Region of domicile				All ages												All ages
				Under 16	16	17	18	19	20 - 24	25 - 39	40 - 49	50 - 59	60 - 64	65 and over	Unspecified	
All areas	Wales	South East Wales region	The Vale of Glamorgan	10	475	525	395	225	560	1,005	410	285	65	80	5	4,040

Black:

Region of domicile				All ages												All ages
				Under 16	16	17	18	19	20 - 24	25 - 39	40 - 49	50 - 59	60 - 64	65 and over	Unspecified	
All areas	Wales	South East Wales region	The Vale of Glamorgan	.	.	*	*	.	*	10	*	5	.	.	.	20

Asian:

Region of domicile				Under 16	16	17	18	19	20 - 24	25 - 39	40 - 49	50 - 59	60 - 64	65 and over	Unspecified	All ages
All areas	Wales	South East Wales region	The Vale of Glamorgan	.	10	15	5	5	10	15	10	*	*	.	.	70

Mixed Race:

Region of domicile				Under 16	16	17	18	19	20 - 24	25 - 39	40 - 49	50 - 59	60 - 64	65 and over	Unspecified	All ages
All areas	Wales	South East Wales region	The Vale of Glamorgan	.	10	10	20	*	5	25	5	*	*	.	.	80

Gender Breakdown

Males:

Region of domicile				Under 16	16	17	18	19	20 - 24	25 - 39	40 - 49	50 - 59	60 - 64	65 and over	Unspecified	All ages
All areas	Wales	South East Wales region	The Vale of Glamorgan	*	265	285	220	130	310	415	150	125	25	25	.	1,955

Females:

Region of domicile				Under 16	16	17	18	19	20 - 24	25 - 39	40 - 49	50 - 59	60 - 64	65 and over	Unspecified	All ages
All areas	Wales	South East Wales region	The Vale of Glamorgan	5	235	280	215	110	280	665	295	185	45	60	5	2,380

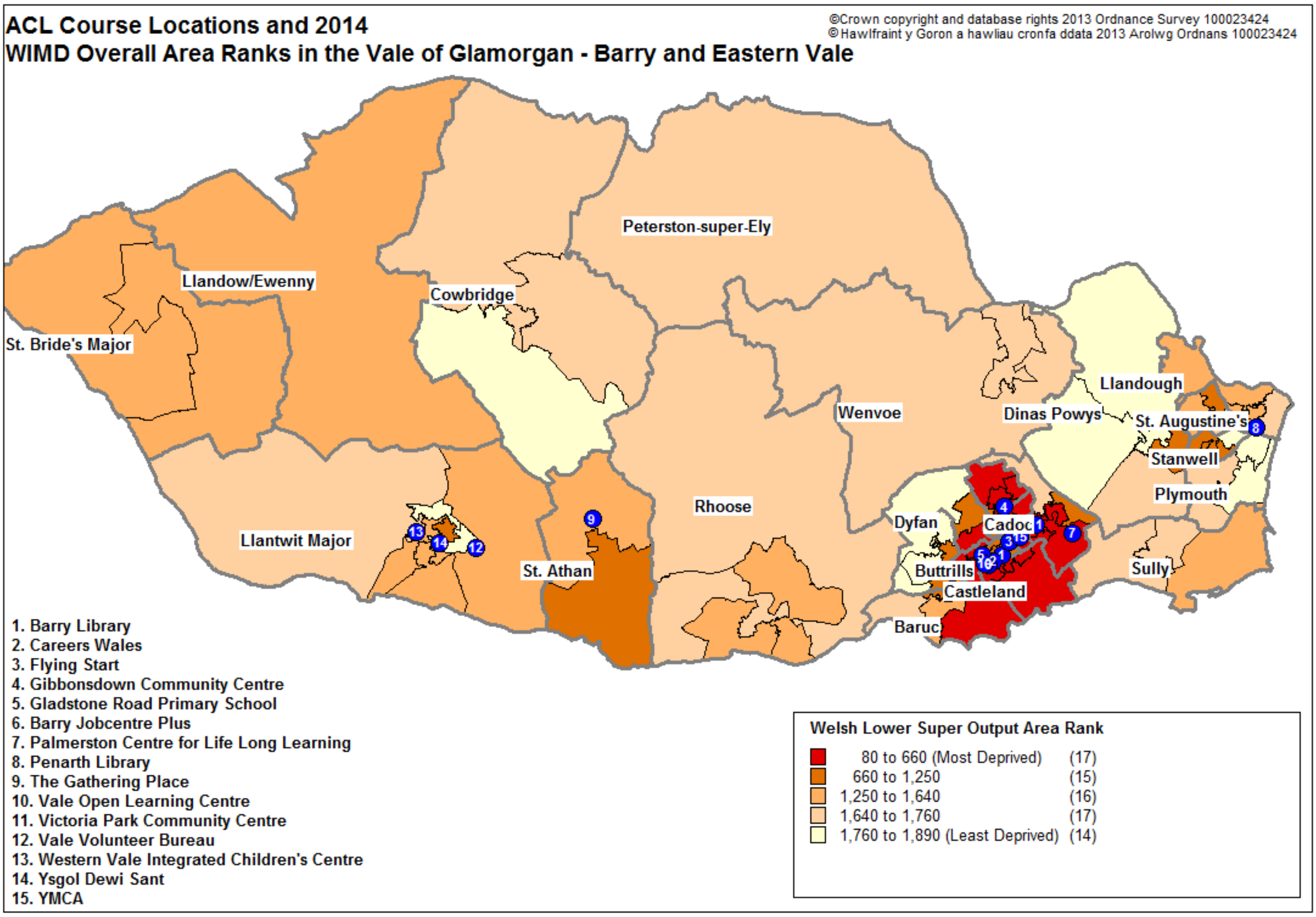
Local authority provided community learning by subjects:

Subject		Under 16	16	17	18	19	20 - 24	25 - 39	40 - 49	50 - 59	60 - 64	65 and over	Unspecified	All ages
		Age group: All ages												
All subjects		15	*	5	10	15	120	380	185	175	30	40	.	975
All subjects	Agriculture, Horticulture and Animal Care	.	.	.	.	.	.	*	.	*	.	.	.	*
	Arts and Crafts	10	.	.	.	.	15	90	35	5	*	5	.	165
	Business, Management and Office Studies	.	.	.	.	.	*	5	*	*	.	.	.	10
	Care and Personal Development (including Basic Skills)	*	.	*	*	*	50	105	45	35	10	*	.	255
	Catering, Food, Leisure Services and Tourism	.	.	.	.	.	*	35	10	*	.	.	.	50
	Construction and Property (Built Environment)	.	.	.	.	.	.	.	.	.	.	.	.	.
	Cultural Studies, Languages and Literature	.	*	*	*	.	*	10	*	5	.	*	.	30
	Education, Training and Teaching	.	.	.	.	.	*	.	.	.	.	.	.	*
	Engineering	.	.	.	.	.	.	.	.	.	.	.	.	.
	Environment Protection, Energy, Cleansing and Security	.	.	.	.	.	.	.	.	.	.	.	.	.
	Health Care, Medicine and Health and Safety	.	.	.	.	*	5	10	*	*	.	.	.	25
	Humanities	.	.	.	.	.	.	.	.	.	.	.	.	.
	Information Technology and Information	.	.	*	*	*	15	70	75	110	20	25	.	320
	Logistics, Distribution, Transport and Driving	.	.	.	.	.	.	.	.	.	.	.	.	.
	Manufacturing and Production Work	.	.	.	.	.	.	.	.	.	.	.	.	.
	Media, Communication and Publishing	.	*	*	.	.	5	15	*	5	*	*	.	35
	Performing Arts	*	.	.	.	.	.	.	.	.	.	.	.	*
	Sales, Marketing and Retailing	.	.	.	.	.	.	*	.	*	*	*	.	*
	Science and Mathematics	.	.	.	.	.	.	5	.	.	.	.	.	5
	Social Sciences	.	.	.	.	.	.	.	.	.	.	.	.	.
	Sports, Games and Recreation	.	.	.	.	.	.	.	.	.	.	.	.	.
	Not specified	.	.	.	*	10	20	30	5	*	.	.	.	75

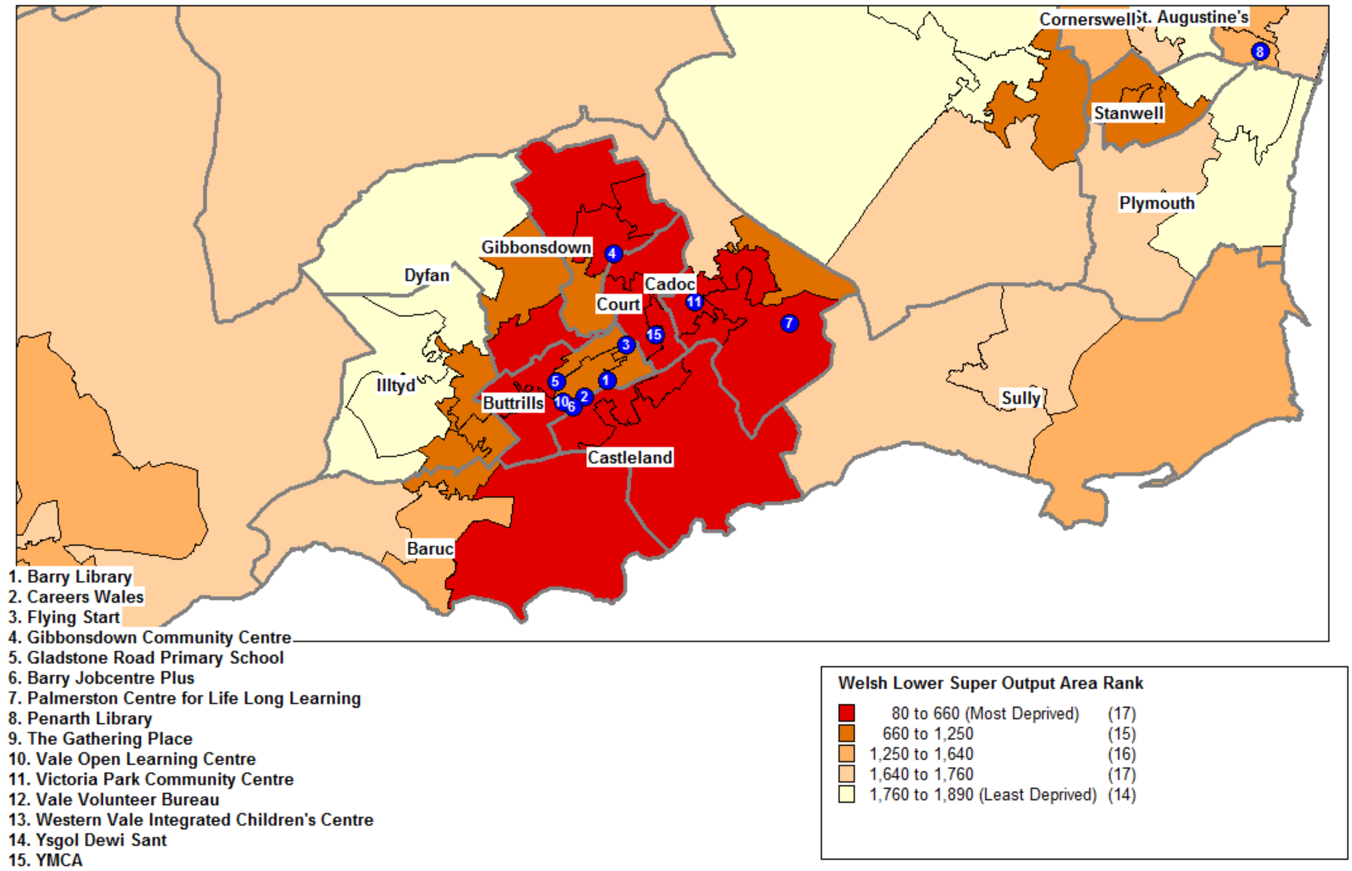
Linked to earlier findings in relation to the differences that exist in qualification levels, adult and community learning courses offered within the Vale of Glamorgan are often located in the more deprived areas of the Vale where qualification levels can be lower. This can often help those who wish to attend courses with access issues and reduces the need to travel which could become an economic barrier to accessing courses for those on a low income.

The maps below show the location of courses in the Vale compared to 2014 WIMD rankings.

Location of ACL courses and WIMD 2014 deprivation ranks.



ACL Course Locations and 2014
WIMD Overall Area Ranks in the Vale of Glamorgan - Barry and Eastern Vale



It was previously recognised that data on successful completions of ACL courses for priority learner groups would be useful to collect. Priority learner groups were identified by Welsh Government as follows:

- Anyone aged 16 and above accessing an ACL basic skills and/or ESOL programme, including contextualised basic skills and citizenship courses;
- Those who are not currently in education, training or employment and are in receipt of state benefits or support (excluding state retirement pension);
- Those aged 50 plus who are not in full-time employment (and who have not previously engaged in learning or who are at risk of not engaging in learning in the future).

For the 2014-15 academic year, the success rate for priority learners in the Vale of Glamorgan was 86%. The success rate across the Cardiff and Vale partnership for priority learner groups was 91% in this period.

Apprenticeships

Apprenticeships can also offer an opportunity to gain practical skills and increase future employability whilst being paid to learn.

In 2014/15, 2,115 people were enrolled on apprenticeships and domiciled in the Vale of Glamorgan across all programme types. Overall 715 were undertaking Foundation level apprenticeships, 650 level 3 apprenticeships and 265 higher level apprenticeships. Somewhat surprisingly more females were enrolled than males. For males, 320 were enrolled on foundation level apprenticeships, 250 at level 3 and 65 on higher level apprenticeships. For females, 395 were enrolled on foundation level apprenticeships, 400 on level 3 and 200 on higher level apprenticeships.

The 20-24 age range had the highest numbers of people completing foundation level apprenticeships. In this age range 145 females and 140 males were enrolled on a foundation level programme.

With regards to those aged over 50, significantly more females were undertaking a higher level apprenticeship.

More males aged under 18 were undertaking apprenticeships that females.

Economy, Employment and Business – Our Findings

Good educational attainment within the Vale of Glamorgan can be viewed as one of the area's strengths and a key component of good well-being. Good educational attainment needs to be matched with a thriving local economy offering good opportunities in order to ensure that people do not leave the area. The Vale's location next to Wales' capital city, Cardiff could therefore be viewed as one of its' greatest assets offering a range of economic and cultural opportunities afforded by a capital city whilst retaining a sense of local character and a rich natural environment.

In relation to the Vale's economic environment, Gross Value Added is higher in the Cardiff and Vale region than other parts of Wales although this has fallen in recent years. Gross Disposable Household Income is also higher in the Cardiff and Vale Region than the Welsh average but lower than the UK average even when London and the South East are excluded.

Average weekly earnings in the Vale are higher than the Welsh and UK average with the latest data showing the average gross weekly pay for full time workers in the Vale to be £607 compared to the Welsh average of £498. Our findings show that gross average weekly pay is higher for male full-time workers than females in the Vale although hourly pay rates show females earn slightly more per hour than their male counterparts, suggesting women in the Vale work fewer hours.

Despite high average earnings overall, differences in income can be observed within the Vale of Glamorgan. Median household incomes in Barry are significantly lower than areas of the Eastern and Western Vale. Differences also still exist within these communities with households in Llantwit Major and St Athan having lower incomes than other parts of the Western Vale and Llandough, Cornerswell and Stanwell having lower median household incomes than other parts of the Eastern Vale. Across Wales 17% of the population are experiencing income deprivation compared to 14% in the Vale. However analysis at LSOA level shows that Dinas Powys 1 had the lowest percentage of population experiencing income deprivation (4%), compared to Gibbonsdown 2 with the highest at 41% - more than double the Welsh average figure.

In the Vale of Glamorgan areas with the lowest incomes are also those with lowest educational attainment and poorer health and life expectancy rates as observed in other sections of our assessment.

Through the Let's Talk Survey we asked residents whether they felt their economic well-being would increase, decrease or stay the same over the next 5 years. The majority of respondents felt their economic well-being would decrease over the next 5 years with the EU referendum results consistently highlighted as the reason for their answer.

The latest ONS UK trade release provides the first estimate for a full quarter of data post the EU referendum. UK trade shows import and export activity and is a main contributor to the overall economic growth of the UK. In the first full quarter since the EU referendum there was a small reduction in the trade deficit, but so far there has been little evidence in the data to show the lower pound value feeding through into trade volume or prices.

As above, although overall income levels in the Vale of Glamorgan are high, differences can be observed when considering data below county level. The same patterns emerge when considering levels of employment.

Employment offers a high level of protection against poverty, and particularly against deep and persistent poverty (and also contributes directly to well-being). Of those who are economically active in the Vale 74% are in employment, slightly higher than the Welsh and UK average. 4% are unemployed which is lower than the Welsh and UK averages. Of those who are economically inactive, the highest percentages (25.4%) are looking after the family/home or are students (24.9%). Only 13.7% were economically inactive due to retirement compared to a Welsh average of 15%. 21% were economically inactive due to long-term sick compared to the Welsh average 28.5%. Of those who are economically inactive in the Vale 28.2% want a job, slightly higher than the Welsh and UK average presenting an opportunity in relation to those who are economically inactive being ready and willing to find employment.

Overall the Vale has a lower than Welsh average percentage of workless households and children living in workless households.

However the areas of the Vale which observed the lowest household incomes as identified earlier are also those with the lowest employment rates, and those with the lowest levels of educational attainment.

The percentage of working age people claiming Job Seekers Allowance (JSA) has increased recently in the Vale and is now in line with the Welsh average whereas it has previously been below. However this is attributed to the Welsh average falling rather than the rate in the Vale significantly increasing. The highest percentages of working age people claiming JSA can be found in Barry and in St. Athan in the Western Vale.

The percentage of JSA claimants who are aged 17-24 in the Vale has previously been in line with the Welsh average but began to increase above average in September 2015. An increase in September has also been observed in previous years which could be attributed to young people leaving education and claiming JSA. Given the overall low numbers of JSA claimants in the Vale the increase could therefore be more pronounced. The Vale also has lower than average NEET figures so further analysis would be required to understand this trend.

The same areas within the Vale of Glamorgan experience deeply entrenched norms of lower educational achievement, lower employment rates and lower incomes. As we have already explored the influence of socio-economic factors in the early years can be crucial in determining the life chances and opportunities of our future generations. A Public Policy Institute for Wales study[4] on what works in reducing intergenerational worklessness and fragile employment identified a range of factors that impact on employment. These include individual factors and circumstances, including health, job-seeking knowledge, skills and qualifications; local contextual factors – including the quantity and quality of local job opportunities, local cultural factors and local labour market operations and norms; and macro level factors – including the state of the macro economy, the welfare regime and policy in the labour market and related domains.

One of the major challenges is helping our residents not just obtain employment but sustaining that employment which leads to in-work progression helping to secure a better future. Long term unemployment data (12 months or more) shows a lower rate in the Vale than all other areas across Wales. However it is based on low responses to the study and is not considered to be robust and is of low quality.

When considering types of employment, the highest percentage of Vale residents were employed in major group 1-3 positions which include managers, directors and senior officials, professional occupations or associate professional and technical. A higher proportion of Vale residents are employed in these occupations compared to the Welsh and UK averages. The Let's Talk survey results also showed that most respondents were either very or fairly satisfied with their job.

It must however be recognised that not only educational attainment but a range of other barriers exist that can influence an individual's ability to find and maintain good employment.

When considering the gap in those with long-term health conditions classed as employed compared to those without a condition and employed, the Vale had one of the smallest gaps in Wales and was significantly below the Welsh average.

Another barrier to work can be age and the percentage of working aged people aged 50+ in employment is higher in the Vale than the Welsh average.

Earlier analysis showed that although women in the Vale of Glamorgan earn more per hour on average than their male counterparts, overall weekly incomes for women are less than for males. This could be attributed to more women working part-time hours due to childcare commitments.

The latest Childcare Sufficiency Assessment for the Vale of Glamorgan (2016/17) was undertaken using the same three community areas as this Well-being Assessment. Data from the CSA illustrates that there is a wealth of childcare available across the Vale, with a total of 6,367 places offered during term time and 2,603 vacancies (41%). During school

[4] http://ppiw.org.uk/files/2016/07/What-Works-in-Reducing-Intergenerational-Worklessness-and-Fragile-Employment.pdf

holidays the number of places reduces to 2,056 and vacancies are only available with childminders and out of school care.

The Western Vale has the highest number of childcare places during term time and 44% of these are vacant. During the school holidays, childcare is more evenly spread across the three community areas.

When focusing on Welsh medium childcare, there are 1,193 places available during term time in Welsh medium or Bilingual medium settings. This is 19% of all childcare places available in all languages. During the school holidays this reduces to 1,036 places. It is worth noting that the majority of these places are in 1 bilingual day nursery (966 places) and therefore, this data needs to be treated with caution.

The most saturated area for childcare providers unsurprisingly is Barry with a total of 103 (42%) although as above the Western Vale has the highest amount of childcare places during term time (41%) and 44% are vacant. This is due to a day nursery in Cowbridge that states a capacity for 966 childcare places. The majority of holiday provision is in the East Vale (54%).

Welsh medium provision is evenly spread across the Vale in terms of pre-school settings and afterschool clubs. However, there is one holiday provision operating 9 weeks of school holidays and 1 that operates for just 2 week of the summer holidays – both clubs are in Barry. The Vale Council is working closely with Menter Bro Morgannwg to assess the need for further holiday provision and the possibility of a Welsh day nursery.

Childcare can be one of the most expensive outlays that some families face and therefore it is important that the Local Authority provide as much information and advice to families on the range of financial support schemes as possible.

Sustainability of the childcare market has been unsettled for some time. Childcare providers who offer day care, afterschool clubs, holiday clubs etc. are finding that increases in rent, staffing costs (changes in National Living Wage, Workplace Pension Scheme), updating qualifications/training; reduction in numbers of children attending formal childcare has had massive impact on sustainability.

The Local Authority continues to support the childcare market with a number of different initiatives. It is hoped that these initiatives in turn support working parents when applying for working tax credit, universal credit and tax free childcare. In addition the Welsh Government's Additional Childcare Offer initiative is due to be piloted in some areas in September 2017. This childcare offer intends to provide 30 hours a week of free early education and childcare for working parents of 3- and 4-year-olds in Wales, for 48 weeks of the year – which includes the current free early education provided. It is anticipated that this will not only support working parents but support the sustainability of the childcare market.

Parents/carers were asked the reasons for using childcare and their views on statements offered in the questionnaire used to inform the CSA. From responses, unsurprisingly, 77.6% agreed that childcare was too expensive.

Where childcare providers are registered with CSSIW, parents/carers are able to use the childcare element of Working Tax Credit or Tax Free childcare schemes, whereas those childcare providers who are not registered with CSSIW, parents/carers are not eligible. 6,367 childcare places are eligible for parents to claim help with childcare costs during term time in the Vale and 2,056 places are eligible during the school holidays. The Government's new Tax Free Childcare Scheme will be introduced in 2017 and will be promoted widely throughout the Vale.

There are significant links between childcare and an individual's well-being. Affordable childcare can impact upon economic well-being as this enables parents who would otherwise have to remain home to care for children to return to work. Being in employment can bring about a range of other benefits not only economic ones but benefits such as being able to socialise with colleagues. This can also help an individual progress in work rather than being away from the labour market for a significant amount of time. It is not only the affordability of childcare but the flexibility of childcare and employers that is important in this respect.

The Vale Family Information Service are receiving an increased number of enquiries from parents who had difficulties in finding suitable, flexible out of hours childcare to suit either shift patterns including evenings and weekends. Therefore an exercise was undertaken to:

- Establish whether there is demand for childcare operating outside normal office hours (i.e. before 8am, after 6pm and/or on weekends).
- Establish whether there is interest, from childcare professionals and newly qualified childcares (who have a level 2 in childcare), in becoming Approved Home Childcares.

PACEY Cymru were tasked to contact employers in and around the Vale of Glamorgan, where employees are required to work outside normal office hours (i.e. before 8am, after 6pm and/or on weekends) and gain feedback from employers as to whether their employees are finding it difficult to find suitable childcare.

PACEY Cymru contacted the following companies:

Replies were received from:

- South Wales Police
- Welsh Health Service - Barry Hospital, Llandough Hospital, Heath Hospital
- Vale of Glamorgan Local Authority
- Parkside House Residential Home, Penarth
- Ty Dyfan Residential Home, Barry
- The Manor House Residential Home, Cowbridge
- Hayes Residential Home, Sully
- All Saint's Domiciliary Care Agency, Dinas Powys
- Willowmere Home Care Agency, Barry
- Allied Health Care, Barry
- Cardiff Airport

No response received from:

- Asda Stores
- Morrisons Stores
- Tescos Stores
- Royal Air Force
- Cardiff National Pool

Questions asked which were put together and agreed included whether the employer was aware how many of the workforce are parents of children under 13 years, whether the employer offers flexibility and considers the needs of parent employees, whether the employer experienced issues with employees taking up employment or continuing work due to childcare and whether the employer offered benefits such as childcare vouchers or onsite childcare

45% of the employers contacted were able to provide a response. Of those responses 63% confirmed that their company had not carried out any related surveys with their employees on this matter however welcomed the call. There was a mix of responses regarding the shift patterns, with 63% stating that some or a large number of employees worked shift patterns which meant working out of the usual office hours, however 88% of those said that they offered some support with work patterns. Some of the support mechanisms in place for staff included consideration on an individual basis, flexible working hours, change of contractual hours, choice of working hours as well as an option to accrue time as part of a flexible policy.

Some companies had encountered some situations where an employee had difficulties with childcare however nothing significant. Employees would be offered change of duties, hours, and even career breaks as required.

Of those responding 38% of the companies offered childcare vouchers which assist with childcare costs, also the National Health Service provided a nursery at both University Hospitals which offered competitive childcare rates.

There are clear links between a thriving local economy and our residents' well-being. A strong local economy will help attract people to reside in the area which further boosts the economy, this in turn provides more employment opportunities for residents who then have increased incomes to spend within the market.

The number of active business in the Vale of Glamorgan has increased in recent years although the rate of new active businesses has decreased but remains above the Welsh average. When considering business survival rates however, the Vale had the highest rate of businesses reaching 5 years trading in Wales.

The largest industries in the Vale are retail trade and the health and social care sector. When considering the projected change in jobs by industry in 2020 compared to 2014, the biggest losses are projected to be in public administration and defence, and the manufacture of plastics industries. The largest projected increases in jobs are predicted to be in the residential care and restaurants and mobile food service industries as identified through the Cardiff and Vale College Labour Market Intelligence Report Update 2015. The PSB has highlighted that these industries are often associated with part time, low paid work which could be cause for concern given the importance of securing good quality employment as highlighted earlier.

The Labour Market Intelligence Report is used for curriculum planning within the college and is discussed at the Vale PSB Improving Opportunities Board which brings together a range of partners including higher education providers, the local authority and local employers. This has helped ensure Vale residents are equipped with the right skills for the job opportunities available, for example when a new large supermarket opened in Barry in 2015, the Barry Communities First Cluster worked with the employer to develop and then deliver targeted recruitment training, preparing residents living in the area for the supermarket's recruitment process. A close working relationship has also been established with Aston Martin.

The Vale has a number of town centres – Cowbridge, Llantwit Major, Penarth and two areas within Barry – Holton Road and High Street. The Town Centre's Framework[5] sets out a range of actions to ensure these town centres thrive and High Street in Barry has recently been

[5] http://www.valeofglamorgan.gov.uk/en/working/regeneration/Town-Centres/Town-Centres.aspx

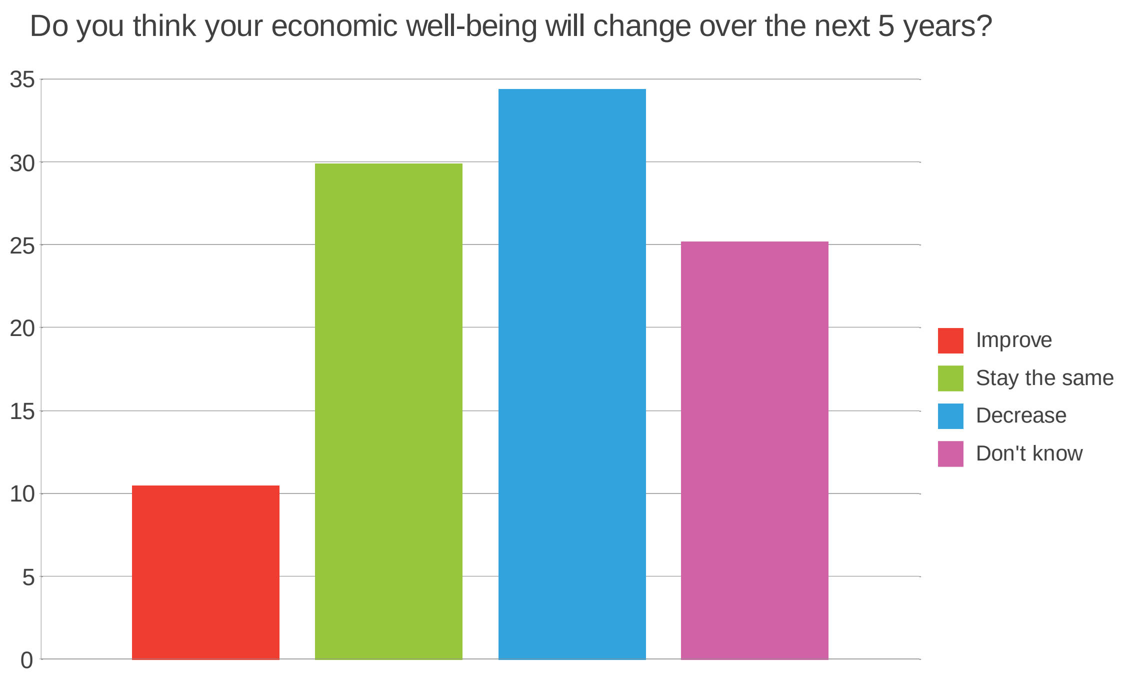
identified as one of the top five locations in Britain for independent shops; with figures released by the Local Data Company revealing that more than 91 per cent of shops in the town's western area (High Street) are independently run.

The Vale's location could be considered one of its greatest assets in maximising the economic well-being of our residents and the area. The Vale is part of the Capital City Region and five priorities have been identified for economic growth; connectivity, digital, innovation, skills, business support and regeneration. A number of infrastructure projects will help support economic growth in the Vale and wider region including, the Great Western mainline electrification, Cardiff Capital Region Metro and the Cardiff Airport and St Athan Enterprise Zone.

A comprehensive programme of regeneration is being implemented across the Vale including, the Rural Local Development Strategy, Town Centres Framework, Penarth Esplanade, Barry Waterfront including the Barry Island Link Road, Barry Island and links between Penarth Haven and the Town Centre, the Tourism Destination Management Plan, and delivery of the 'Tackling Poverty' strand of Welsh Governments' Vibrant & Viable Places' programme.

Economy, Employment and Business – Our Evidence

Economy



Through the 2016 Let's Talk Survey, when asked about how their economic well-being would change over the next five years, the highest proportion of respondents answered that they thought their economic well-being would decrease. Of the 755 respondents who answered this question: 260 (34.4%) answered that their economic well-being would "decrease", 226 (29.9%) respondents that their economic well-being would "stay the same and 190 (25.2%) respondents that they didn't know whether their economic well-being would change over the next 5 years. Only 79 (10.5%) respondents who answered this question thought their economic well-being would increase.

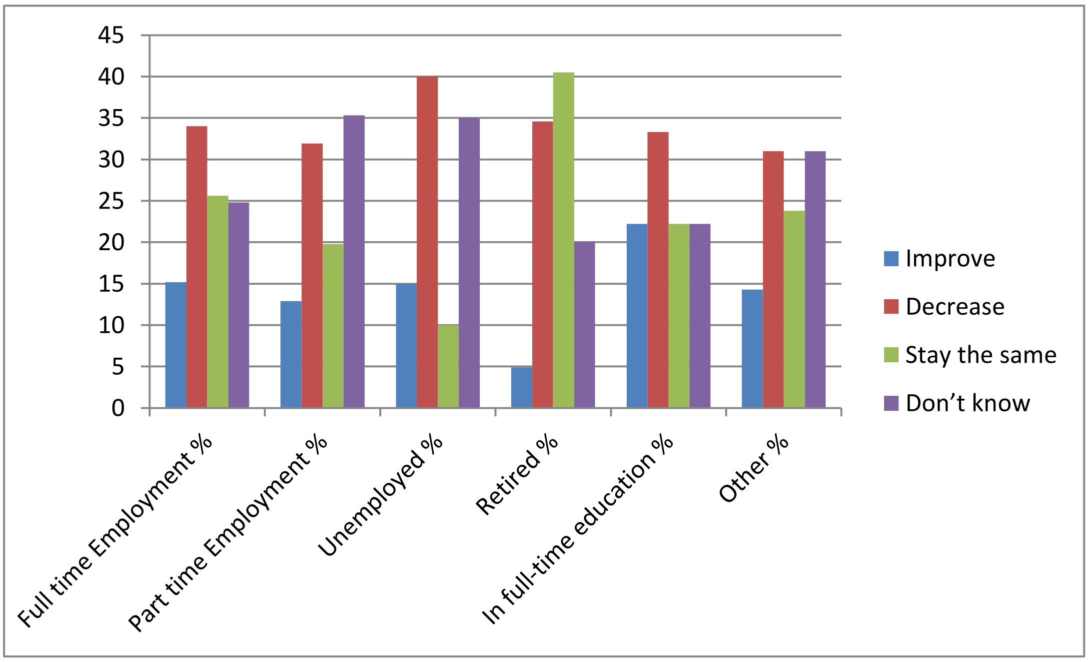
When considering whether their economic well-being would change over the next 5 years respondents were largely negative. It may be noted however that these results could be skewed by the high levels of retired respondents. Further, the survey was conducted in the weeks leading up-to and including the United Kingdom's referendum on membership of the European Union; as such answers given may have been reflective of current economic uncertainties rather than a long term economic analysis.

When disaggregated by age, there are differences in the answers given across the age groups. For those aged over 75, the highest proportion, 27 (41.5%), of respondents stated that their economic well-being would "stay the same". Of those aged between 55-75, the highest proportion 146 (39.4%) answered that they're economic well-being would "decrease" over the next 5 years; this is also the case for those aged between 35-54, 75

(30.4%) respondents from this age group answered that their economic well-being would decrease.

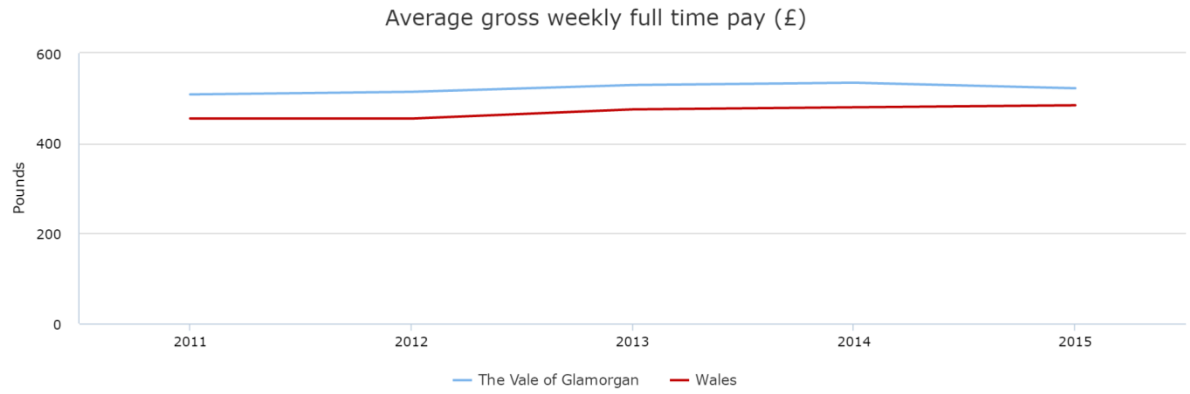
In contrast, for those aged 25-34, the highest proportion of respondents, 20 (42.5%) answered that they did not know if their economic well-being would change over the next 5 years; while the highest proportion of those aged 18-25, 4 (33.3%) answered that their economic well-being would improve.

When reviewed by employment status, there is an interesting split between the different groups. Of those respondents in full-time employment, the highest proportion, 86 (34%) answered that they're economic well-being would "decrease". This answer was echoed by those who identified that they were unemployed, of these respondents, the highest proportion, 8 (40%) answered that they're economic well-being would decrease. In contrast, the highest proportion of respondents who identified as retired answering this question, 125 (40.5%) answered that they're economic well-being would "stay the same" over the next 5 years.



With regards to the Vale’s economy, GVA is highest in Cardiff and Vale area compared to other regions in Wales as is to be expected. However it has fallen in recent years since 2011 which is not the trend observed in all other areas of Wales. Sub-regional GVA is calculated at current basic prices using the income approach. This approach adds up all the income earned by resident individuals or corporations in the production of goods and services and is therefore the sum of uses in the generation of income account for the total economy.

Gross Disposable Household Income higher in Cardiff and Vale than Welsh average but lower than UK even when excluding London and the south east.



	The Vale of Glamorgan	Wales
2011	508.50	455.10
2012	514.30	454.90
2013	529.40	475.30
2014	534.50	480.00
2015	522.20	484.40

Source: Office for National Statistics (ONS)

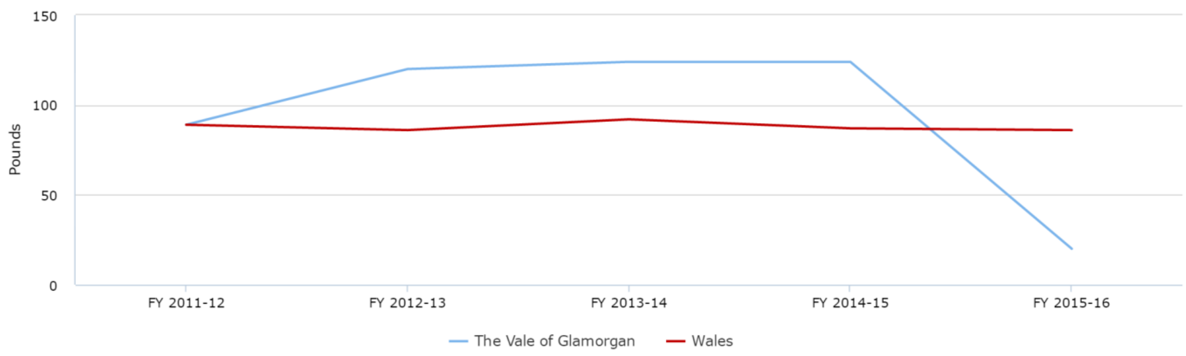
Average gross weekly pay has been consistently higher than Welsh average. The gap started to close in 2014 and 2015 although this has widened again in 2016 as shown in the table below. Average earnings are also higher than the UK average.

Earnings by residence (2016)			
	The Vale of Glamorgan (pounds)	Wales (pounds)	Great Britain (pounds)
Gross weekly pay			
Full-time workers	606.9	498.3	541.0
Male full-time workers	625.8	536.6	581.2
Female full-time workers	579.5	450.4	481.1

Source: Nomis

The pay gap between males and females in the Vale has significantly decreased recently and is now well below average. (It should be noted that the graph below shows a 2015-16 average and therefore differs from figures published in the table above which are based on 2016 only.)

Pounds difference in the average (median) full-time weekly pay between males and females



	The Vale of Glamorgan	Wales
FY 2011-12	89	89
FY 2012-13	120	86
FY 2013-14	124	92
FY 2014-15	124	87
FY 2015-16	20	86

Source: Office for National Statistics (ONS)

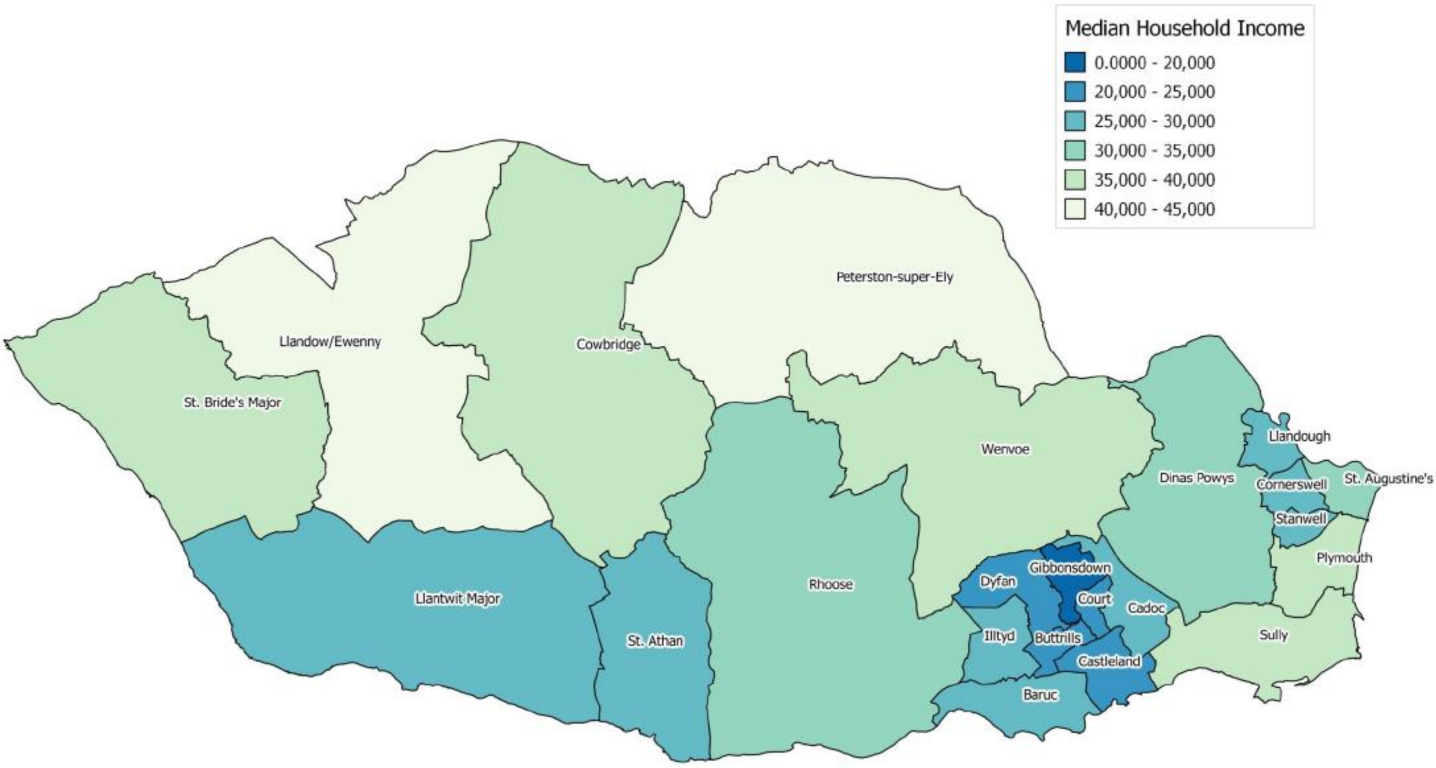
However when considering hourly pay, females in the Vale earn slightly more than males as opposed to the trend observed at a Wales and UK level. As women's average weekly earnings are below that of their male counterparts this would suggest women in the Vale work less hours than men.

Earnings by residence (2016)			
	The Vale of Glamorgan (pounds)	Wales (pounds)	Great Britain (pounds)
Hourly pay- excluding overtime			
Full-time workers	15.51	12.66	13.66
Male full-time workers	15.45	13.04	14.25
Female full-time workers	15.51	12.01	12.84

Income Inequalities

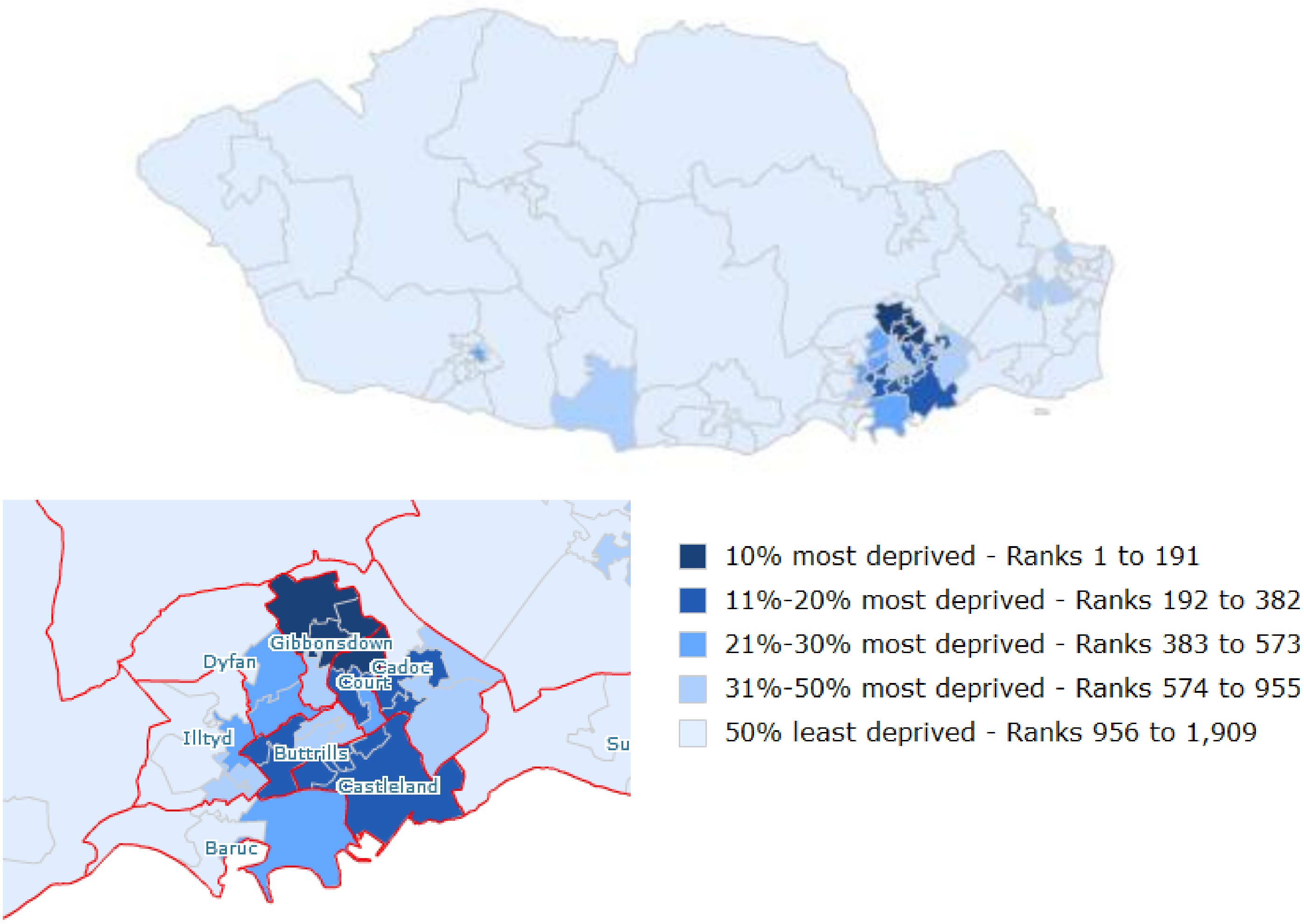
Whilst at a local authority level data points to a higher income than other parts of Wales in the Vale of Glamorgan, when we begin to look at the data at lower geographies, it becomes clear that at the small area level there is a great deal of variation across the Vale of Glamorgan.

The map below shows how median household income differs across the Vale of Glamorgan.



These differences can also be displayed through considering the WIMD 2014 and the income domain of the index.

WIMD 2014– Income Domain



When considering the Income Domain of the WIMD 2014, Gibbonsdown 2 is ranked most deprived in the Vale of Glamorgan.

The Income Domain is comprised of the following indicators:

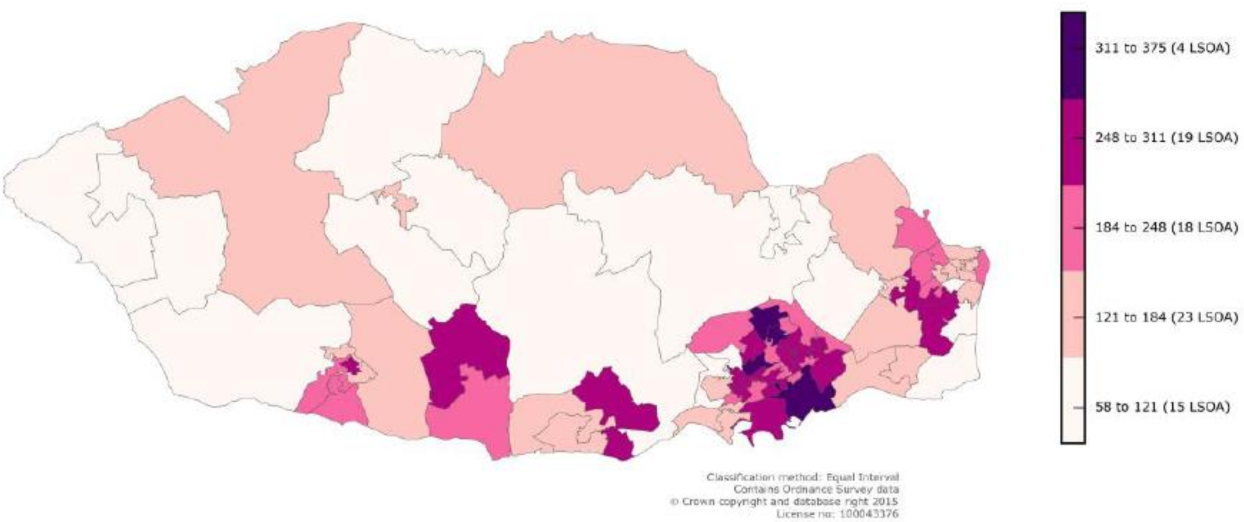
Percentage of total population in income deprivation, defined as those who are either:

- an adult, or dependent child of an adult, in receipt of income related benefits – Income-Based Employment and Support Allowance, Income Support, Jobseekers Allowance, Pension Credit (Source: Dept for Work & Pensions / DWP, 2012/13)
- an adult, or dependent child of an adult, in receipt of Working and Child Tax Credits, with income less than 60 per cent of the Wales median (Source: Her Majesty's Revenue and Customs / HMRC, 2012/13)
- an Asylum Seeker (as defined by section 95 of the Immigration and Asylum Act 1999) (Source: Home Office, 2014).

Income is widely accepted as one of the main determinants of whether an individual or a household experiences some form of poverty or deprivation. The official UK government measure on poverty is based on taking the number of households that have an income less than 60% of the GB median income.

The map below shows that there are a higher number of households with income levels below 60% of GB median income in the southern areas of the Vale of Glamorgan, particularly in Barry.

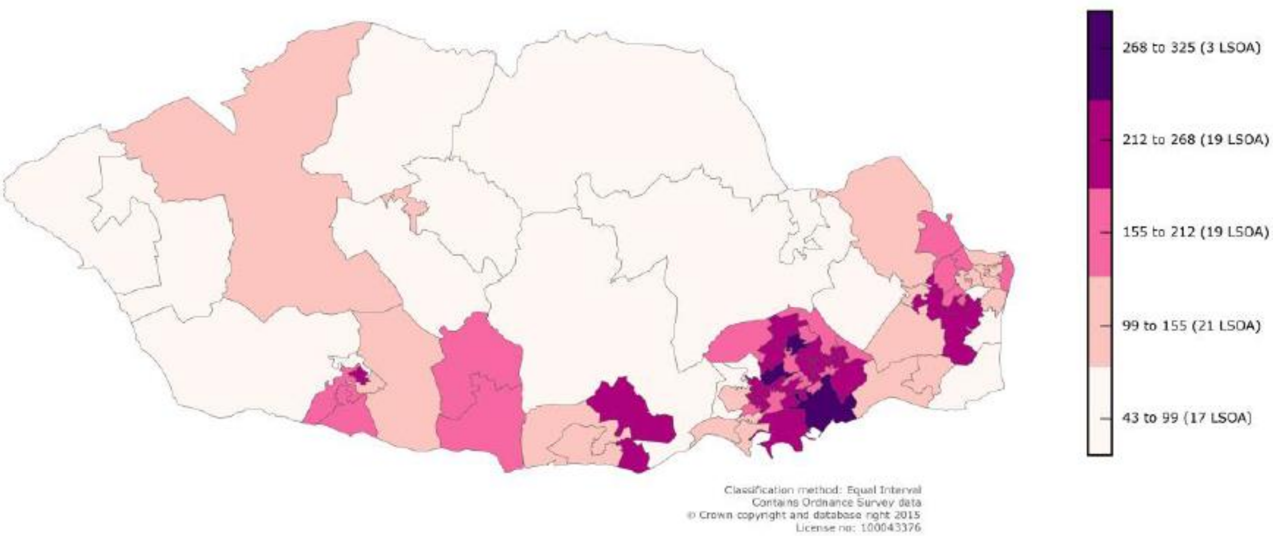
Number of households below 60% of GB median income in the Vale of Glamorgan



Source: CACI Paycheck 2014

Whilst the data shows the numbers of households as opposed to rates of households, and as such will naturally vary across the area, it is worth noting that there appears to be little correlation between the LSOAs with the highest number of households and the LSOAs with the highest number of households whose income is less than 60% of GB median income. The same is also true for households with an income of below 50% of the GB median shown below.

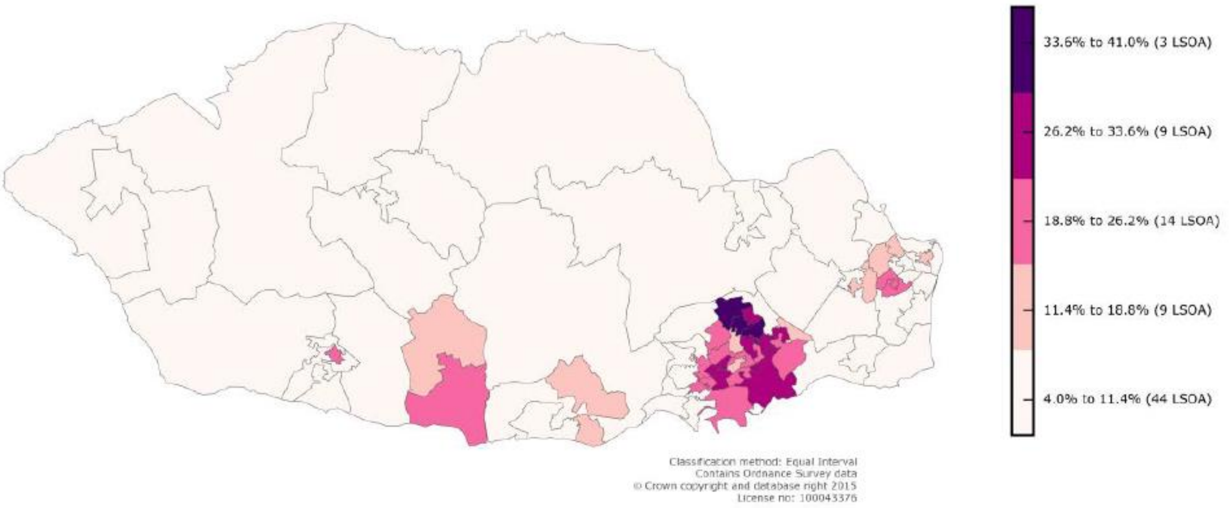
Number of households below 50% of GB median income in the Vale of Glamorgan



Source: CACI Paycheck 2014

Across Wales, 17% of the population are experiencing income deprivation compared to 14% in the Vale of Glamorgan. At LSOA level, 'Dinas Powys 1' has the lowest percentage experiencing income deprivation at 4% of its population, compared to 'Gibbonsdown 2' with the highest at 41%, which is more than double the Wales figure. This disparity in income deprivation at a local level is masked when considering the Vale of Glamorgan average, which is in line with the Wales national average. To fully comprehend the range of the percentage of the population experiencing income deprivation, lower level geography data should be considered.

Percentage of the population considered to be income deprived in the Vale of Glamorgan (2012 – 2014)



Source: WIMD 2014

Employment

At a national level, the Understanding Wales' Future Report highlights that Wales' economic performance is unsurprising given our fundamental economic "assets" in terms of human capital and economic geography. In respect of people, key weaknesses exist in education and skills, particularly towards the bottom of the skills distribution. This is reflected in a low employment rate (and low well-being for those affected). Employment offers a high level of protection against poverty, and particularly against deep and persistent poverty (and also contributes directly to well-being).

Of those who are economically active in the Vale 74% are in employment, slightly higher than the Welsh and UK average. 4% are unemployed which is lower than the Welsh and UK averages. Despite high levels of employment in the Vale of Glamorgan it is important to consider that it is not just employment but good employment that has positive impacts on well-being particularly given the rise in zero hour contracts and the uncertainties this type of employment can bring.

Of those who are economically inactive, the highest percentages (25.4%) are looking after the family/home or are students (24.9%). Only 13.7% were economically inactive due to retirement compared to a Welsh average of 15%. 21% were economically inactive due to long-term sick compared to the Welsh average 28.5%. Of those who are economically inactive in the Vale 28.2% want a job, slightly higher than the Welsh and UK average presenting an opportunity in relation to those who are economically inactive being ready and willing to find employment.

Employment and unemployment (Jul 2015-Jun 2016)				
	The Vale of Glamorgan (numbers)	**The Vale of Glamorgan (%)**	**Wales (%)**	**Great Britain (%)**
All people				
Economically active†	62,600	77.5	75.2	77.9
In employment†	59,800	74.0	71.3	73.8
Employees†	50,800	63.9	61.4	63.1
Self employed†	8,600	9.7	9.3	10.3
Unemployed (model-based)§	2,500	4.0	5.0	5.1
Males				
Economically active†	33,000	83.0	79.3	83.1
In employment†	31,600	79.3	75.0	78.7
Employees†	25,000	64.1	61.7	64.4
Self employed†	6,500	15.0	12.6	13.9
Unemployed§	1,400	4.2	5.2	5.1
Females				
Economically active†	29,600	72.2	71.1	72.7
In employment†	28,200	68.7	67.6	69.0
Employees†	25,900	63.8	61.1	61.8
Self employed†	2,100	4.5	6.0	6.8
Unemployed§	1,400	4.6	4.7	5.0

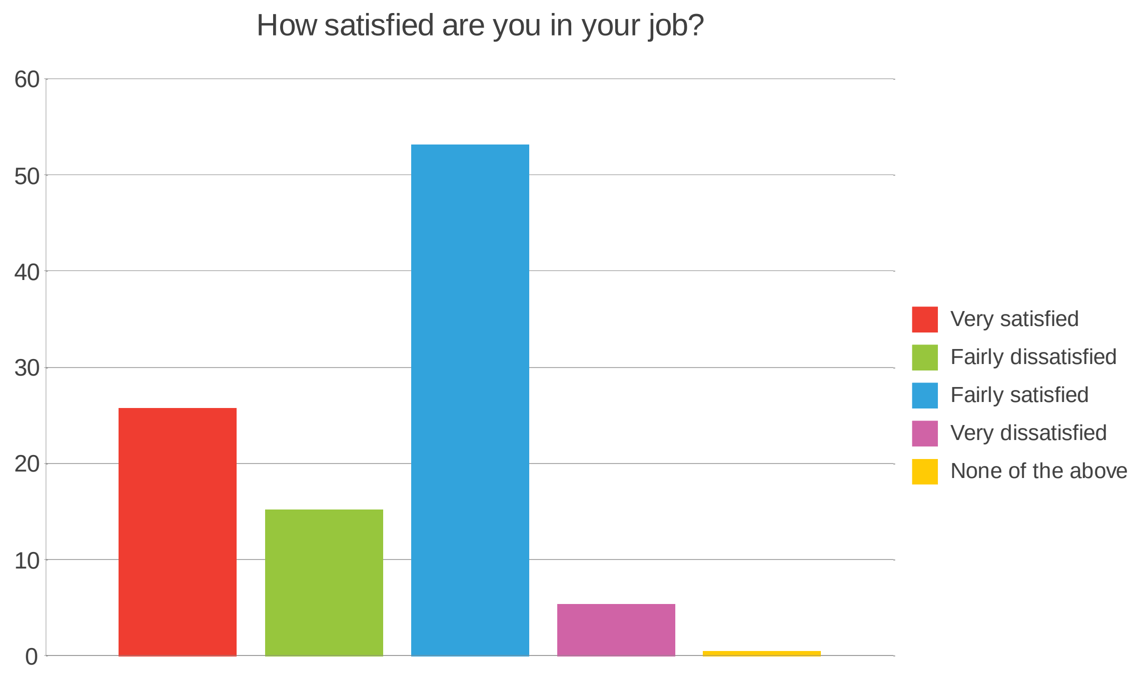
Economic inactivity (Jul 2015-Jun 2016)				
	The Vale of Glamorgan (level)	**The Vale of Glamorgan (%)**	**Wales (%)**	**Great Britain (%)**
All people				
Total	17,200	22.5	24.8	22.1
Student	4,300	24.9	25.4	26.1
looking after family/home	4,400	25.4	19.5	24.7
temporary sick	#	#	2.5	2.3
long-term sick	3,600	21.0	28.5	22.5
discouraged	!	!	0.4	0.4
retired	2,400	13.7	15.0	13.6
other	1,900	10.8	8.7	10.5
wants a job	4,900	28.2	26.6	24.5
does not want a job	12,400	71.8	73.4	75.5

The table below shows that when considering the type of employment within the Vale of Glamorgan, the Vale has a higher than average percentage of people employed in managerial and professional roles and a lower percentage employed in more manual roles. This is likely linked to the higher than average educational attainment and levels of adult skills found in the Vale of Glamorgan as demonstrated earlier in the assessment.

Technological advances are likely to have a huge impact on employment industries in the future.

Employment by occupation (Jul 2015-Jun 2016)				
	The Vale of Glamorgan (numbers)	The Vale of Glamorgan (%)	Wales (%)	Great Britain (%)
Soc 2010 major group 1-3	28,500	47.7	39.7	44.9
1 Managers, directors and senior officials	6,900	11.6	9.2	10.5
2 Professional occupations	12,400	20.7	17.7	20.0
3 Associate professional & technical	9,200	15.4	12.5	14.2
Soc 2010 major group 4-5	13,100	21.9	23.0	21.2
4 Administrative & secretarial	7,400	12.3	10.3	10.5
5 Skilled trades occupations	5,700	9.5	12.4	10.5
Soc 2010 major group 6-7	9,800	16.4	19.1	16.8
6 Caring, leisure and Other Service occupations	5,100	8.6	10.6	9.2
7 Sales and customer service occs	4,700	7.8	8.3	7.5
Soc 2010 major group 8-9	8,400	14.0	18.2	17.2
8 Process plant & machine operatives	3,000	5.0	7.1	6.4
9 Elementary occupations	5,300	8.9	11.0	10.7

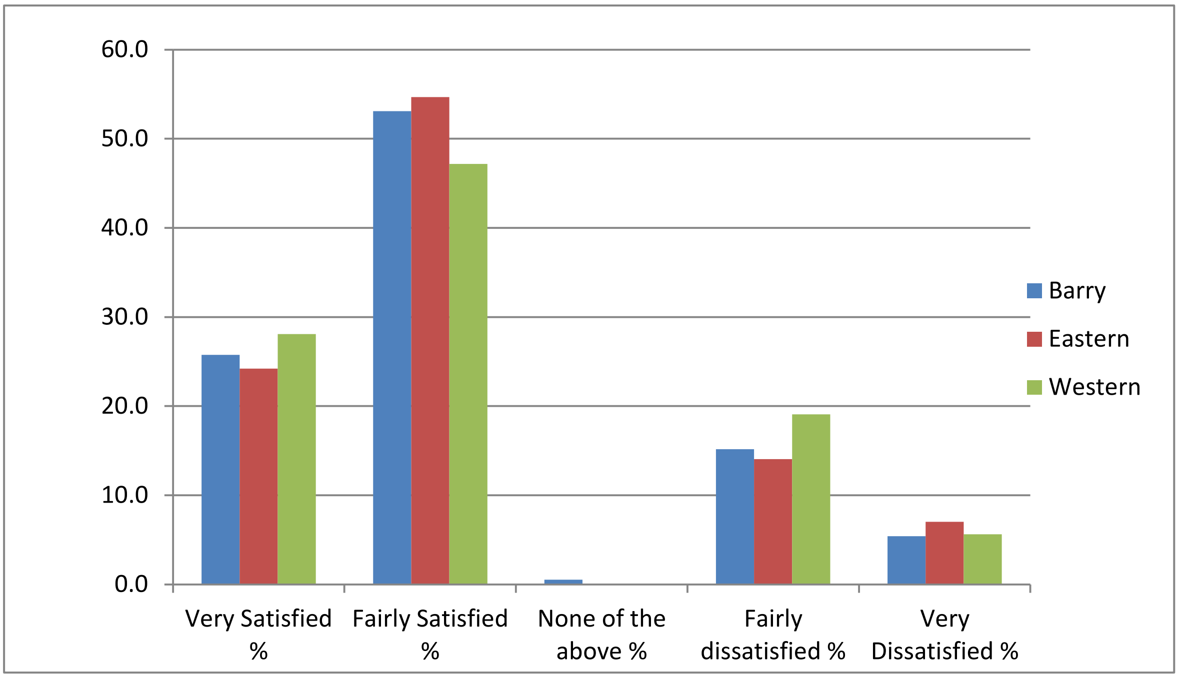
Job Satisfaction



As highlighted, it is not only having a job but being satisfied within your employment that can have a positive impact on well-being.

The 2016 Let's Talk Survey asked respondents whether they were satisfied within their job. Of the 369 respondents who provided an answer to the question on job satisfaction, the highest proportion of respondents answered that they were "fairly satisfied" with their job. 95 (25.7%) respondents answered that they were "very satisfied" with their employment. In comparison, 56 (15.2%) respondents answered that they were "fairly dissatisfied" with their job, and 20 (5.4%) that they were "very dissatisfied".

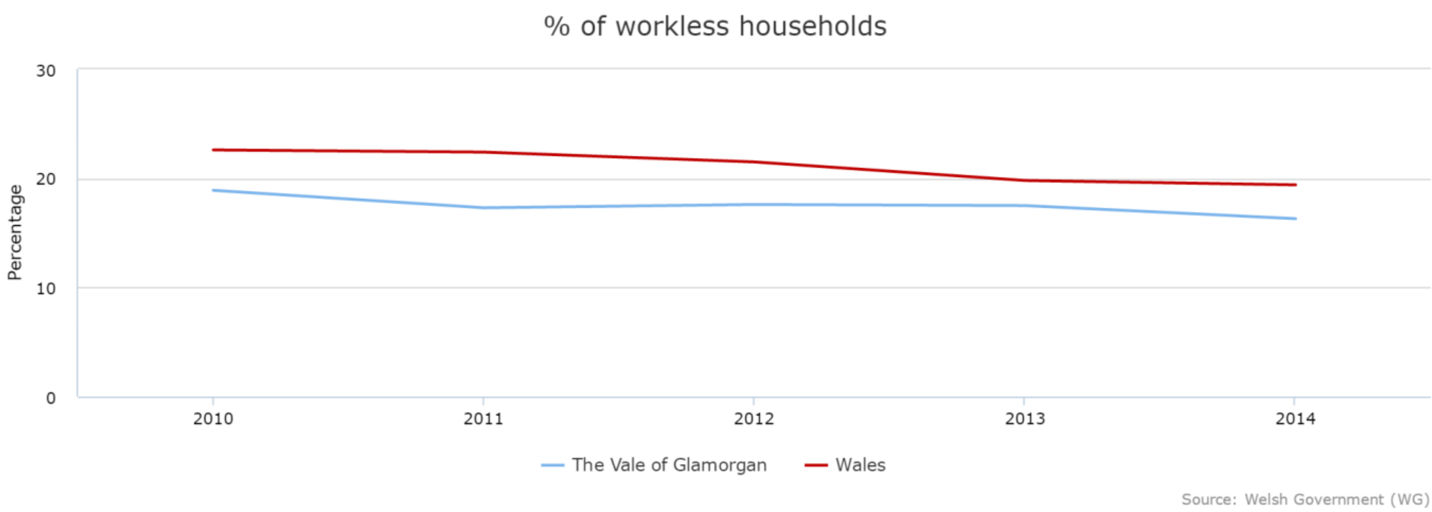
A higher percentage of respondents were 'very satisfied' in their employment in the Western Vale compared to the Eastern Vale and Barry.

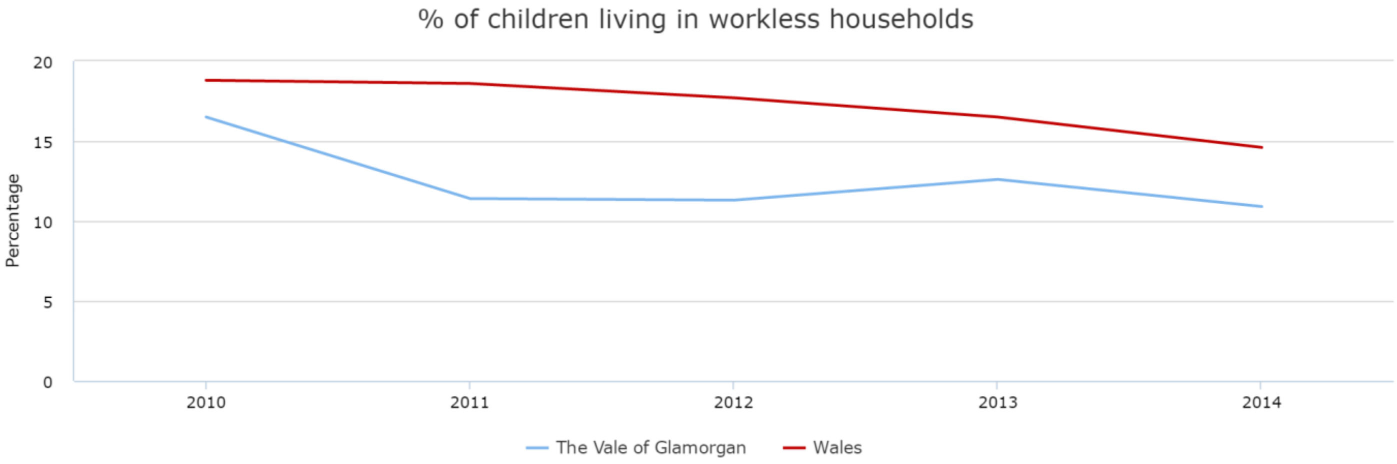


Unemployment

The United Nations refers to unemployment and underemployment as the ‘core of poverty’. Others have argued that being in employment is the opposite of poverty, leading to social inclusion, a sense of purpose, and engagement with the local community, whereas unemployment can bring about a range of issues linked to poverty, including poor mental health and alcohol abuse.

The below graphs shows that the percentage of workless households and the percentage of children living in workless households is lower in the Vale of Glamorgan when compared to the Welsh average.



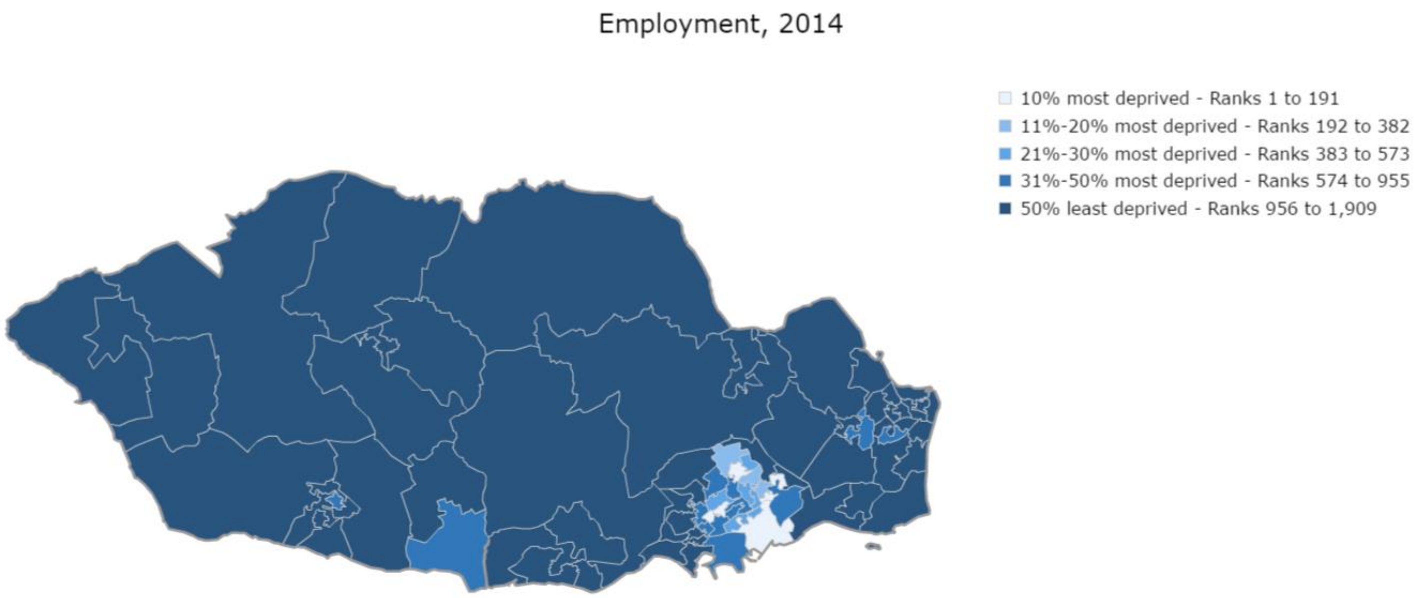


	The Vale of Glamorgan	Wales
2010	16.5	18.8
2011	11.4	18.6
2012	11.3	17.7
2013	12.6	16.5
2014	10.9	14.6

Source: Welsh Government (WG)

Although as demonstrated the Vale has a higher than average level of employment, again inequalities can be seen within the Vale. This can be demonstrated through the employment domain of the WIMD 2014 which is shown in the following map.

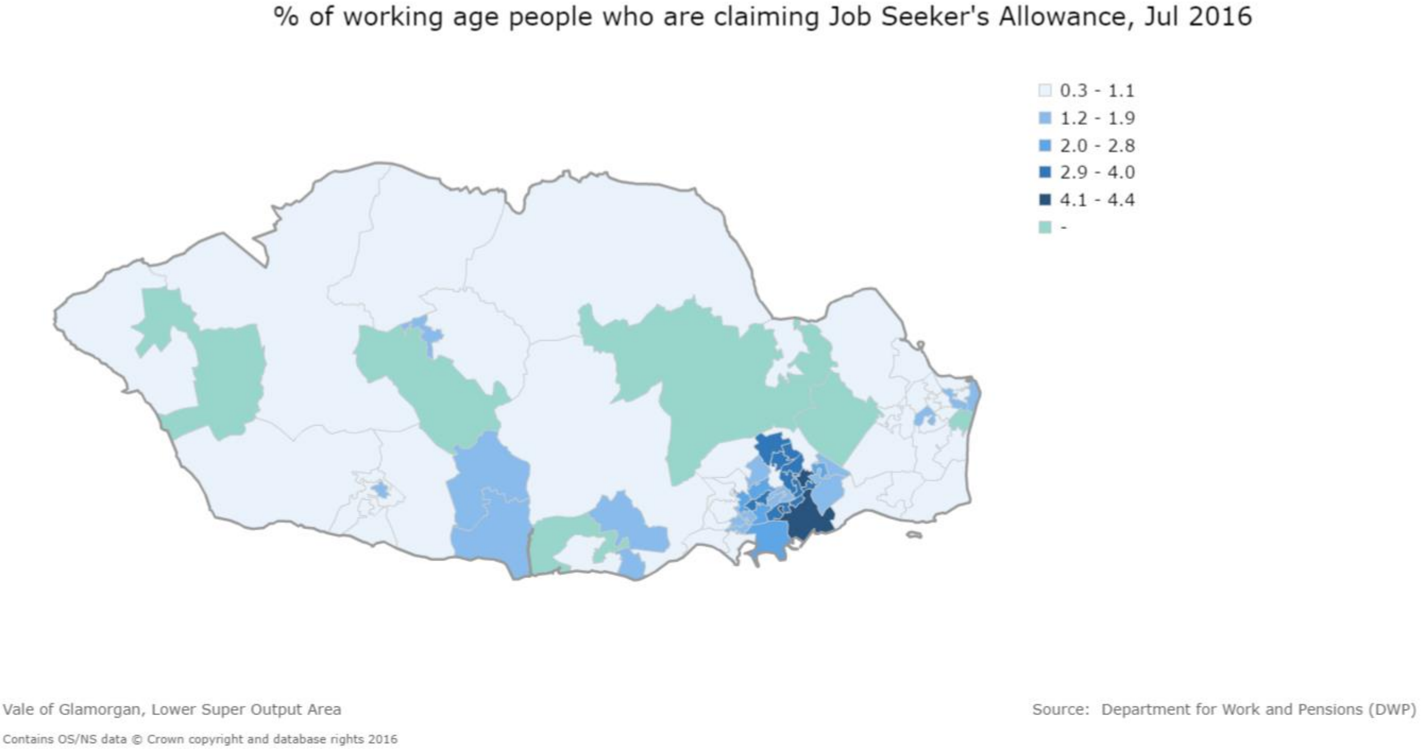
WIMD Employment Domain

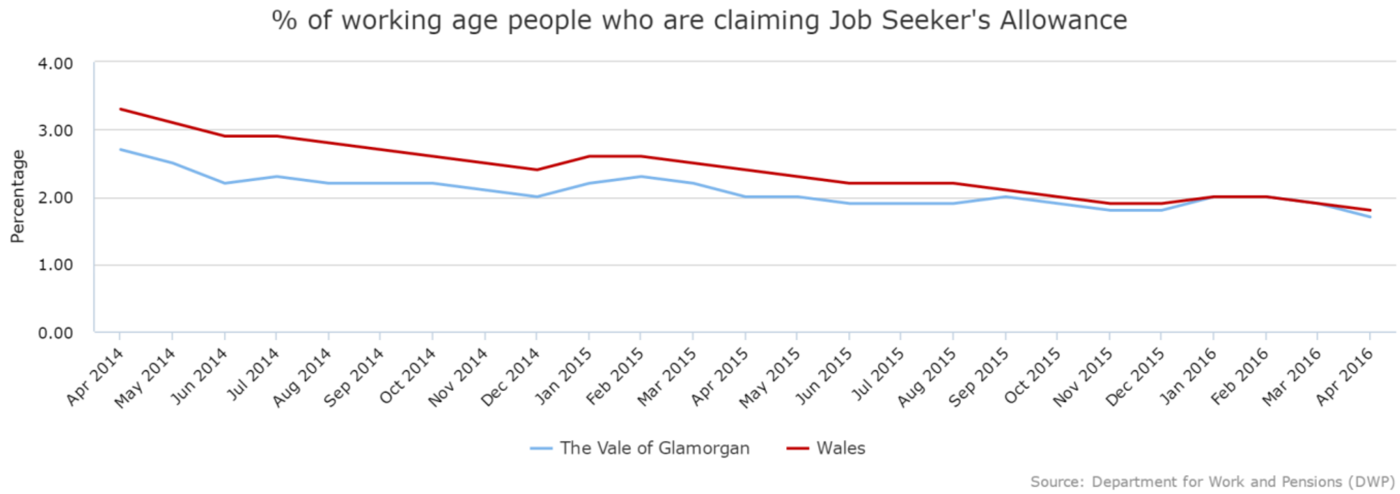


Vale of Glamorgan, Lower Super Output Area

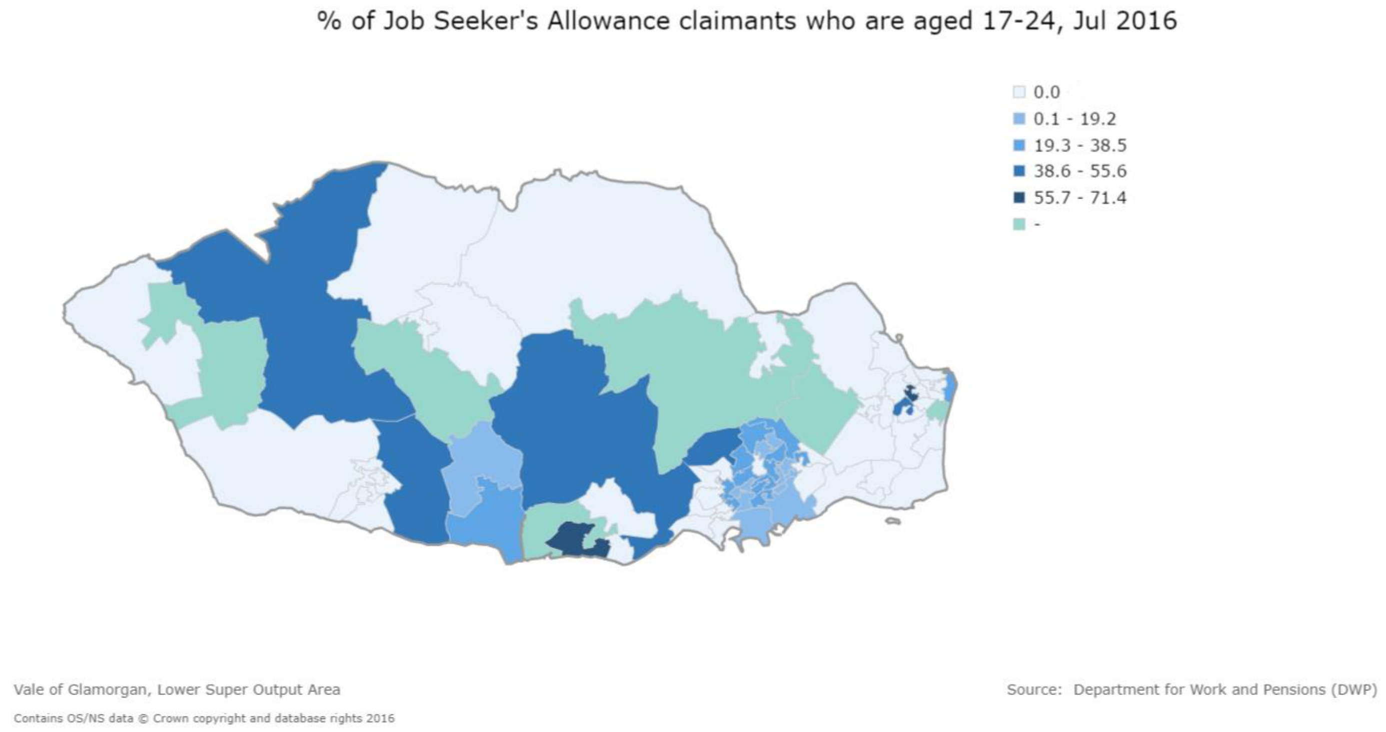
Source: Welsh Government (WG)

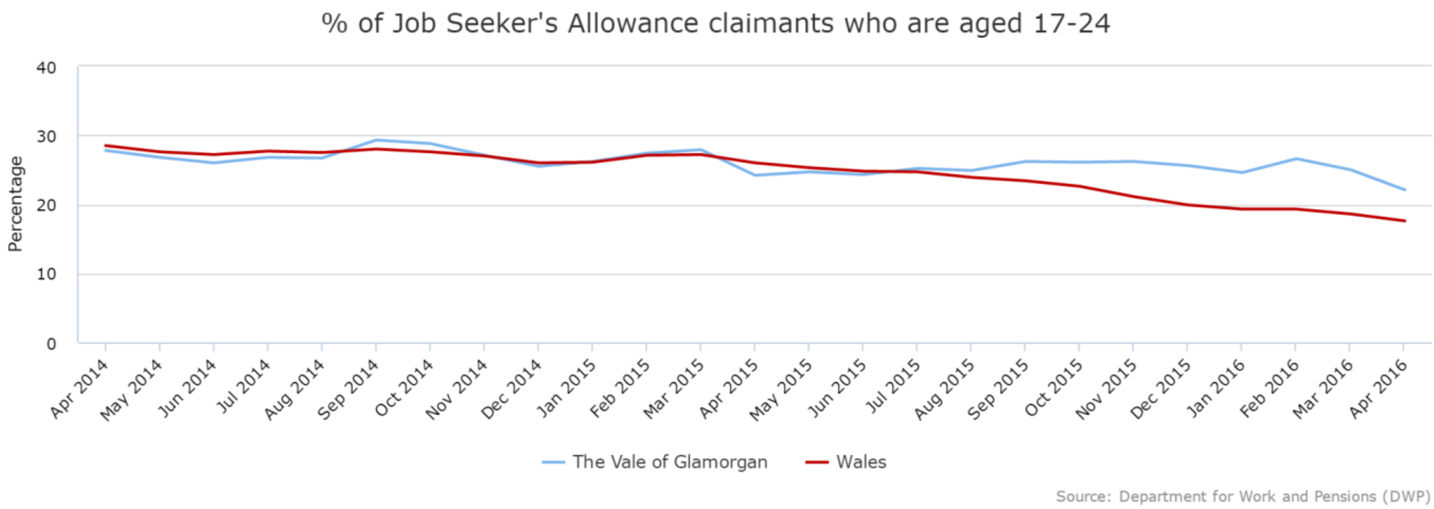
As levels of employment are lower in the more deprived areas particularly to the east of Barry, naturally the percentage of Job Seekers Allowance claimants is highest in these areas.





However, when considering only claimants aged 17-24, a different pattern emerges as shown in the following map. It should be noted that in rural areas there can be very small numbers of claimants in this age category can this may therefore distort figures.


% of Job Seeker's Allowance claimants who are aged 17-24, Jul 2016
0.0
0.1 - 19.2
19.3 - 38.5
38.6 - 55.6
55.7 - 71.4
-
Vale of Glamorgan, Lower Super Output Area
Contains OS/NS data © Crown copyright and database rights 2016
Source: Department for Work and Pensions (DWP)

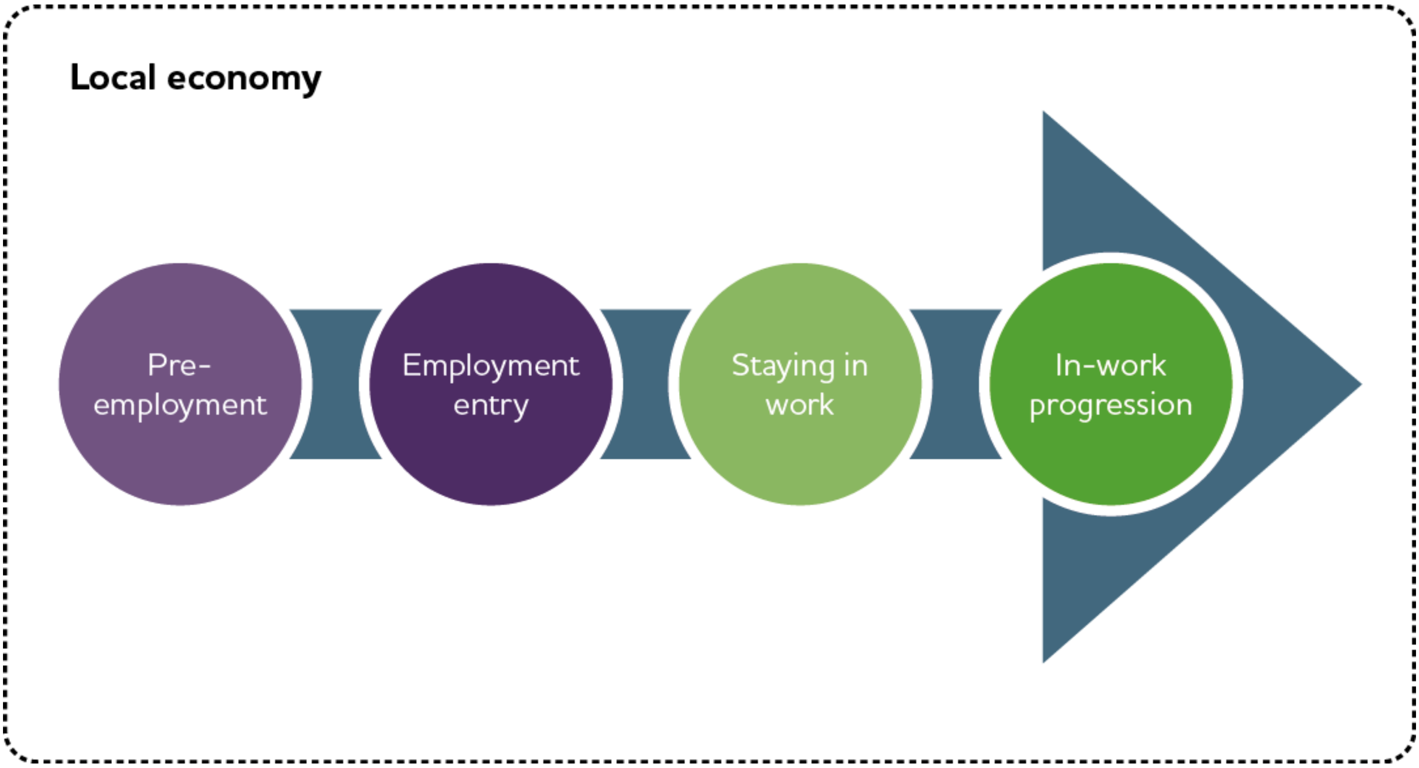

% of Job Seeker's Allowance claimants who are aged 17-24
Percentage
40
30
20
10
0
Apr 2014
May 2014
Jun 2014
Jul 2014
Aug 2014
Sep 2014
Oct 2014
Nov 2014
Dec 2014
Jan 2015
Feb 2015
Mar 2015
Apr 2015
May 2015
Jun 2015
Jul 2015
Aug 2015
Sep 2015
Oct 2015
Nov 2015
Dec 2015
Jan 2016
Feb 2016
Mar 2016
Apr 2016
The Vale of Glamorgan
Wales
Source: Department for Work and Pensions (DWP)

Barriers to employment

It is important to consider that there are a range of factors impacting on employment and can subsequently impact on well-being. A number of these factors can impact on an individual's ability to gain employment but employment and income status can also impact on these factors showing how complex an issue employment status and links to well-being can be.

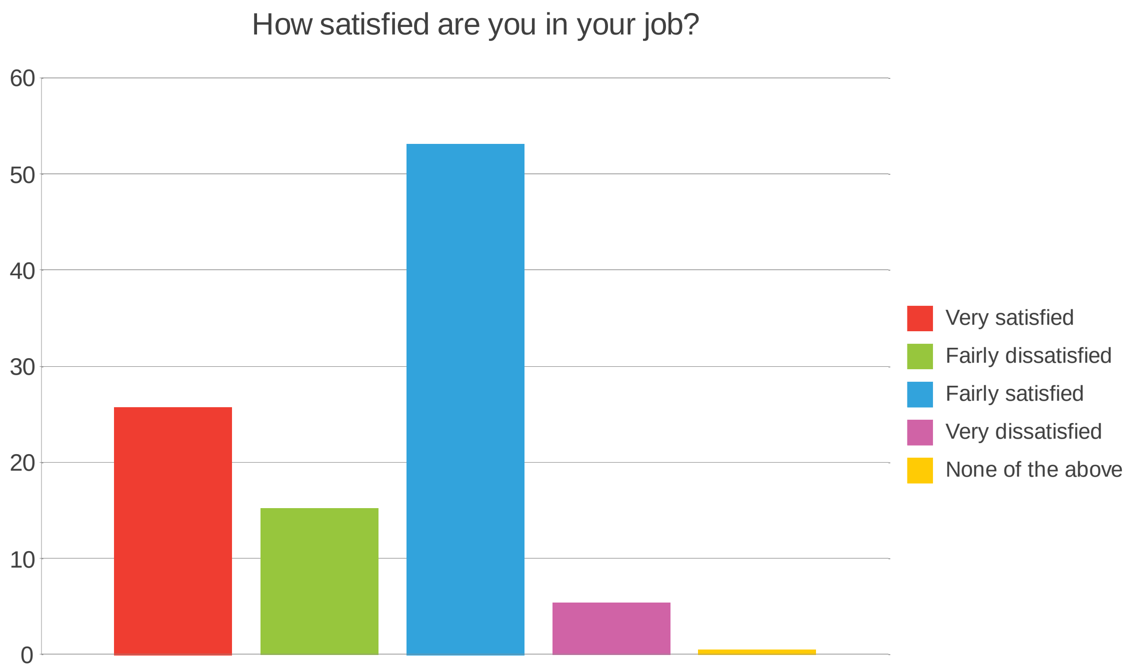
- **Individual factors** – including health, job-seeking knowledge, skills and qualifications;
- **Individual circumstances** – encompassing household circumstances such as caring responsibilities, household work culture and access to resources;
- **Employer/organisational practices** – the role of employers' recruitment practices, and leadership and management culture in individuals' opportunities to enter, sustain and progress in employment;
- **Local contextual factors** – including the quantity and quality of local job opportunities, local cultural factors and local labour market operations and norms; and
- **Macro level factors** – including the state of the macro economy, the welfare regime and policy in the labour market and related domains.

One of the major challenges is not just obtaining employment but sustaining that employment which leads to in-work progression.



Long term unemployment data (12 months or more) shows a lower rate in the Vale than all other areas across Wales. However it is based on low responses and it not considered to be robust and is of low quality.

Job Satisfaction



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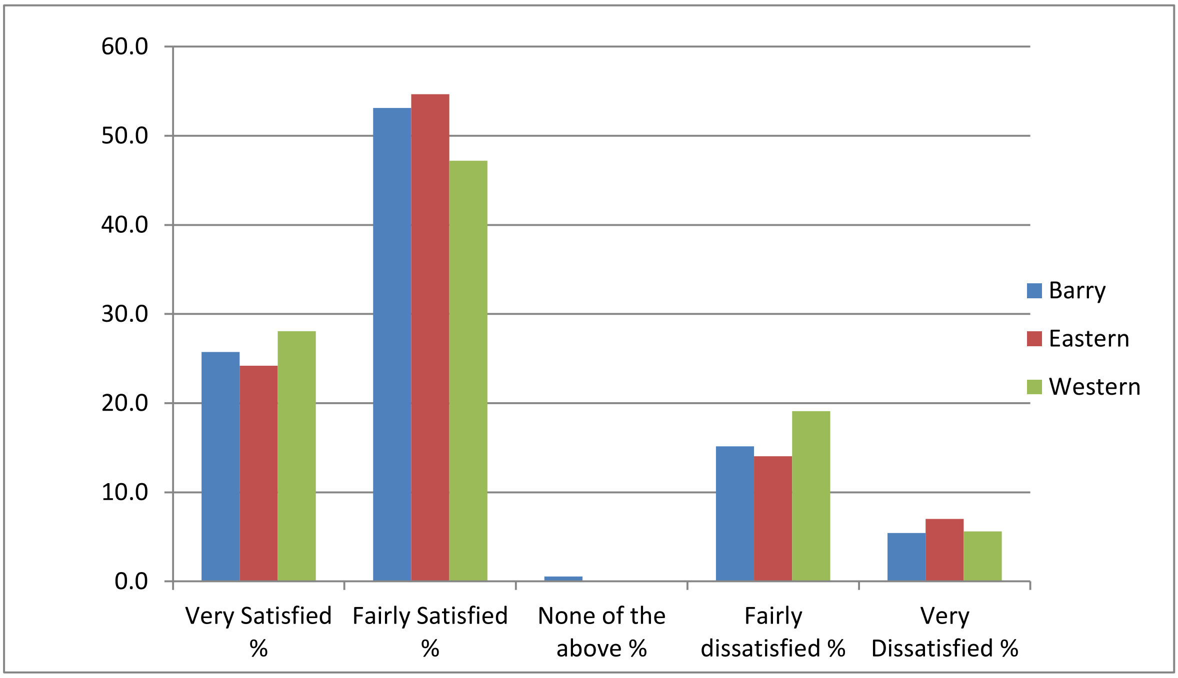


Barriers to work

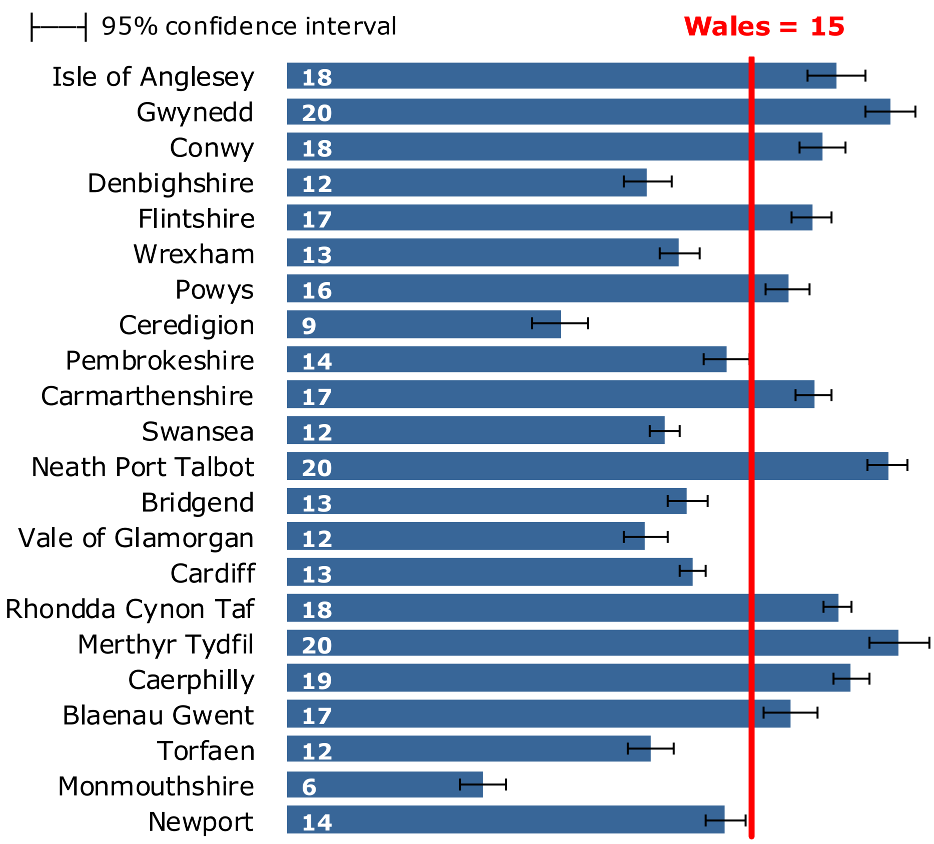
There are a range of factors and circumstances that can act as barriers towards either finding employment, sustaining employment or progressing within employment including demographic features such as age, ethnicity or a disability or circumstantial factors such as childcare arrangements and transport.

Health

Having a long-term health condition can act as a barrier towards gaining or sustaining employment. The chart below shows the gap in employment rate for working age people with a long term health condition and shows that the Vale is significantly better than the Welsh average.

Gap in employment rate* for those with a long-term health condition, persons, aged 16-64, Wales local authorities, 2013-2014 (FY)

Produced by Public Health Wales, using APS data supplied by the Welsh Government



* Difference between i) the percentage of survey respondents with long-term conditions who are classed as employed, and ii) the percentage of all respondents who are classed as employed.

Ethnicity

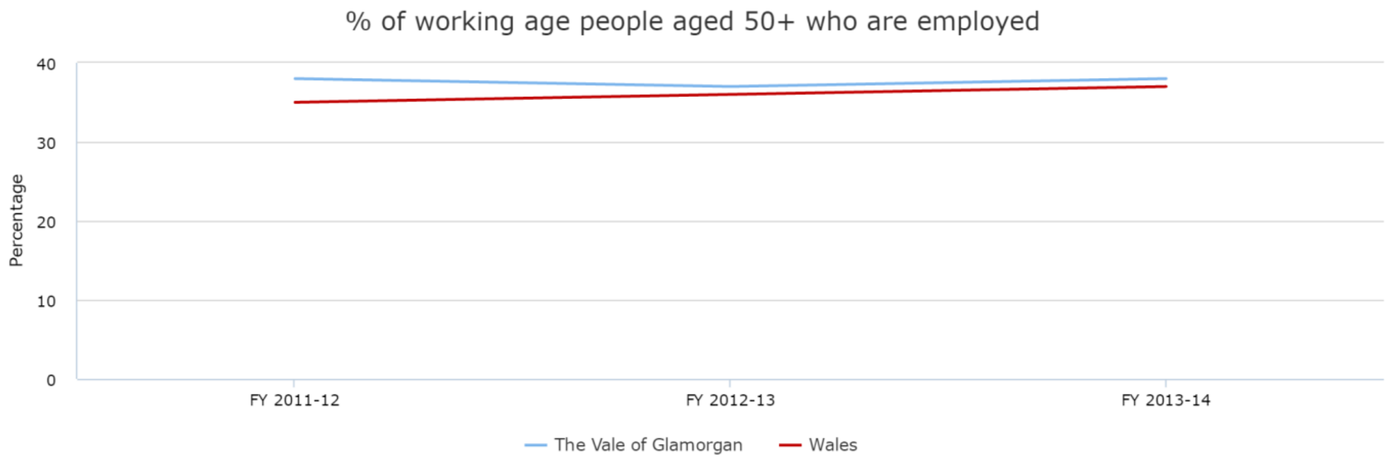
Inequalities in employment and income persist, and for many ethnic minorities this impacts upon their standard of living and experience of poverty. Although there is an evidence gap at a local level, national level research shows that:

- Unemployment rates across Britain were significantly higher for people from all other ethnic minorities (12.9%) compared with for White people (6.3%) in 2013.

- Young ethnic minorities experienced the worst long-term employment outcomes. Between 2010 and 2015 they saw a 49% rise in unemployment compared with a fall of 1% in overall long-term youth unemployment and a 2% fall among young White people.
- Black workers with degrees earn 23.1% less on average than White workers with degrees.
- Black people who leave school with GCSEs typically get paid 11.4% less than their White peers.
- Much lower proportions of ethnic minorities are in senior positions.

Age

Age can form a barrier to gaining employment particularly for those aged 50+. The graph below shows that the Vale has a higher percentage of working age people aged 50+ who are employed compared to the Welsh average.



	The Vale of Glamorgan	Wales
FY 2011-12	38	35
FY 2012-13	37	36
FY 2013-14	38	37

Source: Office for National Statistics (ONS)

Childcare

Childcare arrangements and affordability can also form a barrier to both gaining employment and returning to work after having a child.

The Local Authority has traditionally taken a very positive approach to childcare across the Vale of Glamorgan. Whilst a number of Local Authorities in Wales decided to disband their Early Years Development & Childcare Partnership (EYDCP), member of the Vale's EYDCP were keen for the group to remain in place so that partners and organisations could continue sharing information about local issues and developing national initiatives. The EYDCP meet 3 times a year.

The Vale of Glamorgan EYDCP remains very informed about the demand, accessibility and availability of the childcare needs within its boundaries. Through, working in partnership with the private, voluntary, independent, community and maintained sector, it has shaped and secured children's services whilst having responsibility and a lead role in co-ordinating services and has focussed in particular on the provision of:

- Sufficient, sustainable and flexible childcare that is responsive to parents' needs; and
- Information, advice and assistance relating to childcare to parents, prospective parents and those with parental responsibility or care of a child.

The latest Childcare Sufficiency Assessment for the Vale of Glamorgan (2016/17) was undertaken using the same three community areas as this Well-being Assessment. Data from the CSA illustrates that there is a wealth of childcare available across the Vale, with a total of 6,367 places offered during term time and 2,603 vacancies (41%). During school holidays the number of places reduces to 2,056 and vacancies are only available with childminders and out of school care.

The Western Vale has the highest number of childcare places during term time and 44% of these are vacant. During the school holidays, childcare is more evenly spread across the three community areas.

When focusing on Welsh medium childcare, there are 1,193 places available during term time in Welsh medium or Bilingual medium settings. This is 19% of all childcare places available in all languages. During the school holidays this reduces to 1,036 places. It is worth noting that the majority of these places are in 1 bilingual day nursery (966 places) and therefore, this data needs to be treated with caution.

The most saturated area for childcare providers unsurprisingly is Barry with a total of 103 (42%) although as above the Western Vale has the highest amount of childcare places during term time (41%) and 44% are vacant. This is due to a day nursery in Cowbridge that states a capacity for 966 childcare places. The majority of holiday provision is in the East Vale (54%).

Welsh medium provision is evenly spread across the Vale in terms of pre-school settings and afterschool clubs. However, there is one holiday provision operating 9 weeks of school holidays and 1 that operates for just 2 week of the summer holidays – both clubs are in Barry. The Vale Council is working closely with Menter Bro Morgannwg to assess the need for further holiday provision and the possibility of a Welsh day nursery.

	Registered				**Excepted / Approved**			
	Barry	Eastern Vale	Western Vale	**Total**	Barry	Eastern Vale	Western Vale	**Total**
*Childminders	76	45	45	**166**				
Crèche	2			**2**	**1**			**1**
Full Day Care	6	10	10	**26**				
Out of School Care	8	9	6	**23**	4	4	9	**18**
Sessional Care	11	4	12	**27**	3	1	1	**5**
Open Access Play					1	3	4	**8**
Approved Childcare Providers					**5**	**6**	**2**	**13**
Total	**103**	**68**	**73**	**244**	**14**	**14**	**16**	**45**

Childcare can be one of the most expensive outlays that some families face and therefore it is important that the Local Authority provide as much information and advice to families on the range of financial support schemes as possible. The Vale Family Information Service Website provides information to families on a variety of topics. The Support to Parents page provides a section on financial help. Within this section, there is detailed information on financial help around:

- Expecting a baby
- New parents
- If you are working
- If you are studying
- If your child has a disability

- And useful contacts

Sustainability of the childcare market has been unsettled for some time. Childcare providers who offer day care, afterschool clubs, holiday clubs etc. are finding that increases in rent, staffing costs (changes in National Living Wage, Workplace Pension Scheme), updating qualifications/training; reduction in numbers of children attending formal childcare has had massive impact on sustainability.

The Local Authority continues to support the childcare market with a number of different initiatives. It is hoped that these initiatives in turn support working parents when applying for working tax credit, universal credit and tax free childcare. In addition the Welsh Government's Additional Childcare Offer initiative is due to be piloted in some areas in September 2017. This childcare offer intends to provide 30 hours a week of free early education and childcare for working parents of 3- and 4-year-olds in Wales, for 48 weeks of the year – which includes the current free early education provided. It is anticipated that this will not only support working parents but support the sustainability of the childcare market.

Parents/carers were asked the reasons for using childcare and their views on statements offered in the questionnaire used to inform the CSA. From responses, unsurprisingly, 77.6% agreed that childcare was too expensive.

Where childcare providers are registered with CSSIW, parents/carers are able to use the childcare element of Working Tax Credit or Tax Free childcare schemes, whereas those childcare providers who are not registered with CSSIW, parents/carers are not eligible. 6,367 childcare places are eligible for parents to claim help with childcare costs during term time in the Vale and 2,056 places are eligible during the school holidays. The Government's new Tax Free Childcare Scheme will be introduced in 2017 and will be promoted widely throughout the Vale.

The Childcare sufficiency Assessment also takes into account those who use childcare outside the Local Authority area as well as those who travel to the Local Authority area to use childcare. Local authorities should consult with their neighbouring Local Authorities to assess the numbers involved and ensure they are reflected in the assessment. This should include information on:

- Current and future demand for childcare outside of the Local Authority area, broken down by childcare type and number of places being used or required
- Current and future demand for childcare within the Local Authority area by parents living outside the Local Authority area, broken down by childcare type and number of places being used or required

An e-mail was sent to the Local Authorities bordering the Vale of Glamorgan with regards to cross boarder childcare. Information was only received from one Local Authority which provided very limited details. Some points that they did raise were:

A parent in the Vale of Glamorgan commented that they are looking for Welsh medium provision/education as it is not available to her child in her locality.

Past enquiries have been for non-maintained education where parents are not allocated the times convenient to them. For instance one parent was offered afternoon part-time provision but as it wasn't convenient they looked at other options within Rhondda Cynon Taff.

Most cross border enquiries that have been received in the past have been for RCT parents looking to send their children to close border schools such as Pendoylan Church in Wales or Llansannor Primary Schools.

The Vale Family Information Service are receiving an increased number of enquiries from parents who had difficulties in finding suitable, flexible out of hours childcare to suit either shift patterns including evenings and weekends. Therefore an exercise was undertaken to:

- Establish whether there is demand for childcare operating outside normal office hours (i.e. before 8am, after 6pm and/or on weekends).
- Establish whether there is interest, from childcare professionals and newly qualified childcares (who have a level 2 in childcare), in becoming Approved Home Childcares.

PACEY Cymru were tasked to contact employers in and around the Vale of Glamorgan, where employees are required to work outside normal office hours (i.e. before 8am, after 6pm and/or on weekends) and gain feedback from employers as to whether their employees are finding it difficult to find suitable childcare.

PACEY Cymru contacted the following companies:

Replies were received from:
- South Wales Police
- Welsh Health Service - Barry Hospital, Llandough Hospital, Heath Hospital
- Vale of Glamorgan Local Authority
- Parkside House Residential Home, Penarth
- Ty Dyfan Residential Home, Barry

- The Manor House Residential Home, Cowbridge
- Hayes Residential Home, Sully
- All Saint's Domiciliary Care Agency, Dinas Powys
- Willowmere Home Care Agency, Barry
- Allied Health Care, Barry
- Cardiff Airport

No response received from:

- Asda Stores
- Morrisons Stores
- Tescos Stores
- Royal Air Force
- Cardiff National Pool

Questions asked which were put together and agreed included:

1. Do you know how many of your workforce are parents of children under 13 years?

2. Are all employees required to work shift patterns outside normal office hours (i.e. before 8am, after 6pm and/or on weekends)?

3. Do you offer flexibility and consider the needs of parent employees?

If yes - how?

5. Have you experienced issues with employees taking up employment or continuing work due to childcare?

If yes, what type of issues has been raised?

7. How have you tackled these issues?

8. Do you offer any of the following?

a. Childcare vouchers

b. Financial assistance towards childcare

c. Onsite childcare

d. Information about the Family Information Service

9. How can we support you to improve childcare for your employees?

10. Have you any other comments about childcare or issues surrounding childcare in the Vale?

11. How do you provide information to your employees? E.g. email, staff intranet, post, meetings…

12. We have a survey for parent employees to gain some feedback. Can you help us distribute this?

Findings show that the majority of businesses were either unable or unwilling to respond, of the 16 companies contacted on 45% were happy to feedback.

Of those responses 63% confirmed that their company had not carried out any related surveys with their employees on this matter however welcomed the call.

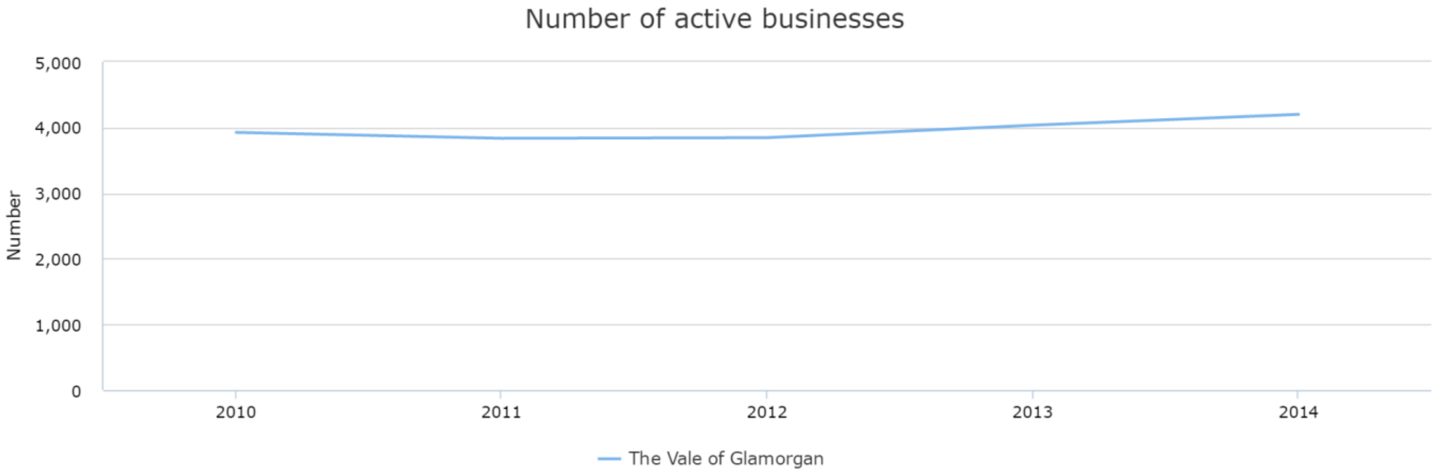
There was a mix of responses regarding the shift patterns, with 63% stating that some or a large number of employees worked shift patterns which meant working out of the usual office hours, however 88% of those said that they offered some support with work patterns. Some of the support mechanisms in place for staff included consideration on an individual basis, flexible working hours, change of contractual hours, choice of working hours as well as an option to accrue time as part of a flexible policy.

Some companies had encountered some situations where an employee had difficulties with childcare however nothing significant. Employees would be offered change of duties, hours, and even career breaks as required.

Of those responding 38% of the companies offered childcare vouchers which assist with childcare costs, also the National Health Service provided a nursery at both University Hospitals which offered competitive childcare rates.

Business and Industry

The number of active businesses in the Vale of Glamorgan is increasing as shown in the chart below.

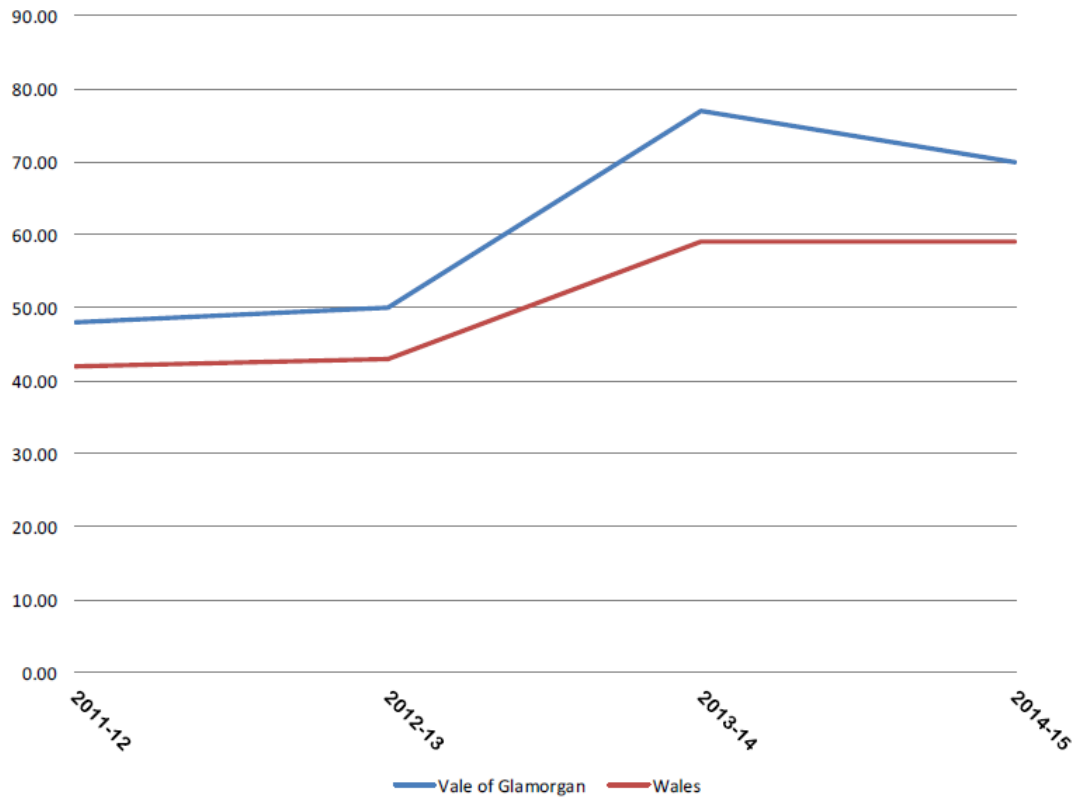


	The Vale of Glamorgan
2010	3,925
2011	3,835
2012	3,845
2013	4,035
2014	4,200

Source: Office for National Statistics (ONS)

Although the number of active business is rising in the Vale, business death rates are slightly above Welsh average, there is also a decreasing number of new active businesses.

Rate of new active businesses per 10,000 working age population.



However latest available data shows the Vale of Glamorgan has the highest rate of businesses surviving 5 years trading across Wales.

Business Survival Rates – Business birth year 2009

			1 year	2 years	3 years	4 years	5 years
Wales			92.1	73.9	58.8	47.9	40.8
Wales	North Wales	Isle of Anglesey	91.9	67.6	59.5	48.6	37.8
		Gwynedd	91.2	73.5	60.3	50.0	45.6
		Conwy	91.5	74.6	62.0	47.9	39.4
		Denbighshire	89.5	71.9	52.6	43.9	36.8
		Flintshire	92.4	75.0	58.7	46.7	39.1
		Wrexham	92.2	76.6	58.4	46.8	37.7
	Mid Wales	Powys	92.5	77.5	67.5	56.3	47.5
		Ceredigion	94.9	82.1	66.7	56.4	43.6
	South West Wales	Pembrokeshire	93.9	81.8	66.7	54.5	45.5
		Carmarthenshire	93.1	74.3	59.4	48.5	41.6
		Swansea	93.2	72.9	56.4	45.1	38.3
		Neath Port Talbot	93.0	75.4	56.1	42.1	35.1
	South East Wales	Bridgend	92.9	72.6	57.1	46.4	39.3
		Vale of Glamorgan	93.6	76.9	62.8	53.8	47.4
		Cardiff	90.6	71.4	55.7	45.8	40.4
		Rhondda Cynon Taff	92.5	74.5	60.4	50.0	43.4
		Merthyr Tydfil	92.0	84.0	56.0	48.0	40.0
		Caerphilly	93.2	71.6	56.8	45.9	40.5
		Blaenau Gwent	91.3	65.2	52.2	43.5	39.1
		Torfaen	94.7	71.1	55.3	44.7	39.5
		Monmouthshire	90.1	71.8	60.6	49.3	42.3
		Newport	90.4	71.1	55.4	44.6	37.3

With regards to industries of employment within the Vale of Glamorgan, the Cardiff and Vale College Labour Market Intelligence Update Report 2015 showed a high proportion of those employed are in the retail trade/repair of motor vehicle and the health and social sector. Most of the Vale's businesses employ less than ten employees (82.5%). However, it must be noted that a large proportion 12.4% are in the professional, scientific and technical sectors.

Largest Industries

Industry	2014 Jobs	2020 Jobs	Change in Jobs (2014-2020)	% Change	2014 Earnings Per Worker
Residential care activities for learning disabilities, mental health and substance abuse	3,046	3,503	457	15%	£20,620
Retail sale in non-specialised stores with food, beverages or tobacco predominating	2,344	2,465	122	5%	£15,858
Primary education	1,867	1,718	-149	-8%	£21,403
Public administration and defence; compulsory social security	1,699	1,297	-402	-24%	£29,236
Restaurants and mobile food service activities	1,446	1,640	194	13%	£13,208
General secondary education	1,322	1,306	-16	-1%	£25,136
Beverage serving activities	1,173	1,068	-105	-9%	£14,838
Manufacture of plastics in primary forms	772	532	-240	-31%	£29,105
Repair and maintenance of aircraft and spacecraft	756	632	-124	-16%	£40,340
Retail sale of clothing in specialised stores	754	756	2	0%	£16,828

Highest Paying Industries (Based on Industries with ≥ 750 Jobs)

Description	2014 Jobs	2020 Jobs	2014 - 2020 Change	2014 - 2020 % Change	Current Total Earnings
Repair and maintenance of aircraft and spacecraft	756	632	(124)	(16%)	Â£40,340
Public administration and defence; compulsory social security	1,699	1,297	(402)	(24%)	Â£29,236
Manufacture of plastics in primary forms	772	532	(240)	(31%)	Â£29,105
General secondary education	1,322	1,306	(16)	(1%)	Â£25,136
Primary education	1,867	1,718	(149)	(8%)	Â£21,403
Residential care activities for learning disabilities, mental health and substance abuse	3,046	3,503	457	15%	Â£20,620
Retail sale of clothing in specialised stores	754	756	2	0%	Â£16,828
Retail sale in non-specialised stores with food, beverages or tobacco predominating	2,344	2,465	121	5%	Â£15,858
Beverage serving activities	1,173	1,068	(105)	(9%)	Â£14,838
Restaurants and mobile food service activities	1,446	1,640	194	13%	Â£13,208
Total	**15,179**	**14,918**	**(261)**	**(2%)**	**Â£21,412**

When considering the projected change in jobs by industry in 2020 compared to 2014, the biggest losses are projected to be in public administration and defence, and the manufacture of plastics industries. The largest projected increases in jobs are predicted to be in the residential care and restaurants and mobile food service industries. The PSB has highlighted that these industries are often associated with part time, low paid work which could be cause for concern given the importance of securing good quality employment as highlighted earlier.

Cardiff and Vale College
Coleg Caerdydd a'r Fro

Fastest Growing Industries

Industry	2014 Jobs	2020 Jobs	Change in Jobs (2014-2020)	% Change	2014 Earnings Per Worker
Residential care activities for learning disabilities, mental health and substance abuse	3,046	3,503	457	15%	£20,620
Restaurants and mobile food service activities	1,446	1,640	194	13%	£13,208
Temporary employment agency activities	463	614	151	33%	£19,291
Retail sale in non-specialised stores with food, beverages or tobacco predominating	2,344	2,465	122	5%	£15,858
Manufacture of air and spacecraft and related machinery	719	831	112	16%	£35,568
Painting and glazing	328	411	83	25%	£26,727
Maintenance and repair of motor vehicles	485	563	78	16%	£20,724
Other food service activities	134	199	66	49%	£19,054
Other printing	219	282	63	29%	£25,550
Real estate agencies	361	419	58	16%	£34,660

Key Employers in the Vale of Glamorgan include the following;

- RWE Npower Plc
- Centrica Barry Power Station
- British Airways Maintenance
- Lafarge Cement Works
- Cardiff International Airport
- St. Athan MOD Base
- Vale of Glamorgan Council
- Renishaw
- Dow Corning

The highest concentration of employment is in Barry and the associated docks, manufacturing works and industrial estates.

Research and Development

In order for industries to grow research & development is an important factor and is key to driving global innovation, but its importance for jobs growth needs to be kept in proportion. There is increasing demand for high skills, but it is also important to remember the demand for interpersonal skills. The Vale's Improving Opportunities Board has commented on finding young graduates have a lack of these essential communication skills.

51% of Welsh businesses are classed as being innovation active compared to the UK average of 53%. While England was leading the way with 54 per cent innovative firms (up from 45 per cent), Wales had the second highest proportion of innovative firms with 51 per cent (47 per cent previously)

Innovation activity is defined here as where enterprises were engaged in any of the following:

1. Introduction of a new or significantly improved product (good or service) or process;
2. Engagement in innovation projects not yet complete or abandoned;
3. New and significantly improved forms of organisation, business structures or practices and marketing concepts or strategies;

The Understanding Wales' Future Report highlighted that one of the most important factors in attracting people to help local businesses thrive is its attractiveness. Places that are attractive to the well-educated will tend to "win". Smaller urban centres will need to base their attractiveness on their overall quality of life. In Wales we need to improve the attractiveness of places in Wales to attract and retain the highly skilled: factors such as "quality of place" and accessibility important here.

Our assessment has therefore also considered the Vale's infrastructure, culture and assets in order to maximise our opportunities to improve well-being.

Infrastructure – Our Findings

The Vale's location can be seen as one of its greatest assets with good transport links into Cardiff. The Vale is also home to Cardiff Airport and is part of the capital city region with the future metro vision of a multi-modal rapid transit network integrating all transport modules offering the passenger a single ticket 'turn up and go' experience.

However the area's transport links may impact upon poor air quality that is observed in some areas of the Vale. Sustainable transport infrastructure and services can contribute to reducing negative impacts that cars have on the environment, reducing congestion, improving health and wellbeing, improving access to employment, health and education and other facilities and reducing the risk of road accidents. Objectives in the Vale's Local Transport Plan which complements the Local Development Plan include increasing the number of cycle trips, increasing the number of park and ride spaces and users, reducing congestion and improving air quality at strategic junctions and improving accessibility to bus services.

In rural locations where Active Travel Schemes cannot be achieved, community transport and bus service provision is promoted to support improvements in accessibility for the more vulnerable user groups and there are a number of community transport services in the Vale including Greenlinks.

Transport was often raised as a topic during our engagement exercise particularly in the rural Western Vale. Respondents wanted improvements to public transport, in particular, the frequency of buses and trains in rural areas although some felt there were good services. The condition of roads and pavements was also a frequently raised issue. This theme also emerged through the St. Athan Community Mapping Project where residents highlighted that bus service timetables to the nearest train station in Llantwit Major did not align in order to allow users to commute into Cardiff during peak times without a 1 hour+ wait. Since the project was undertaken negotiations with transport providers have begun.

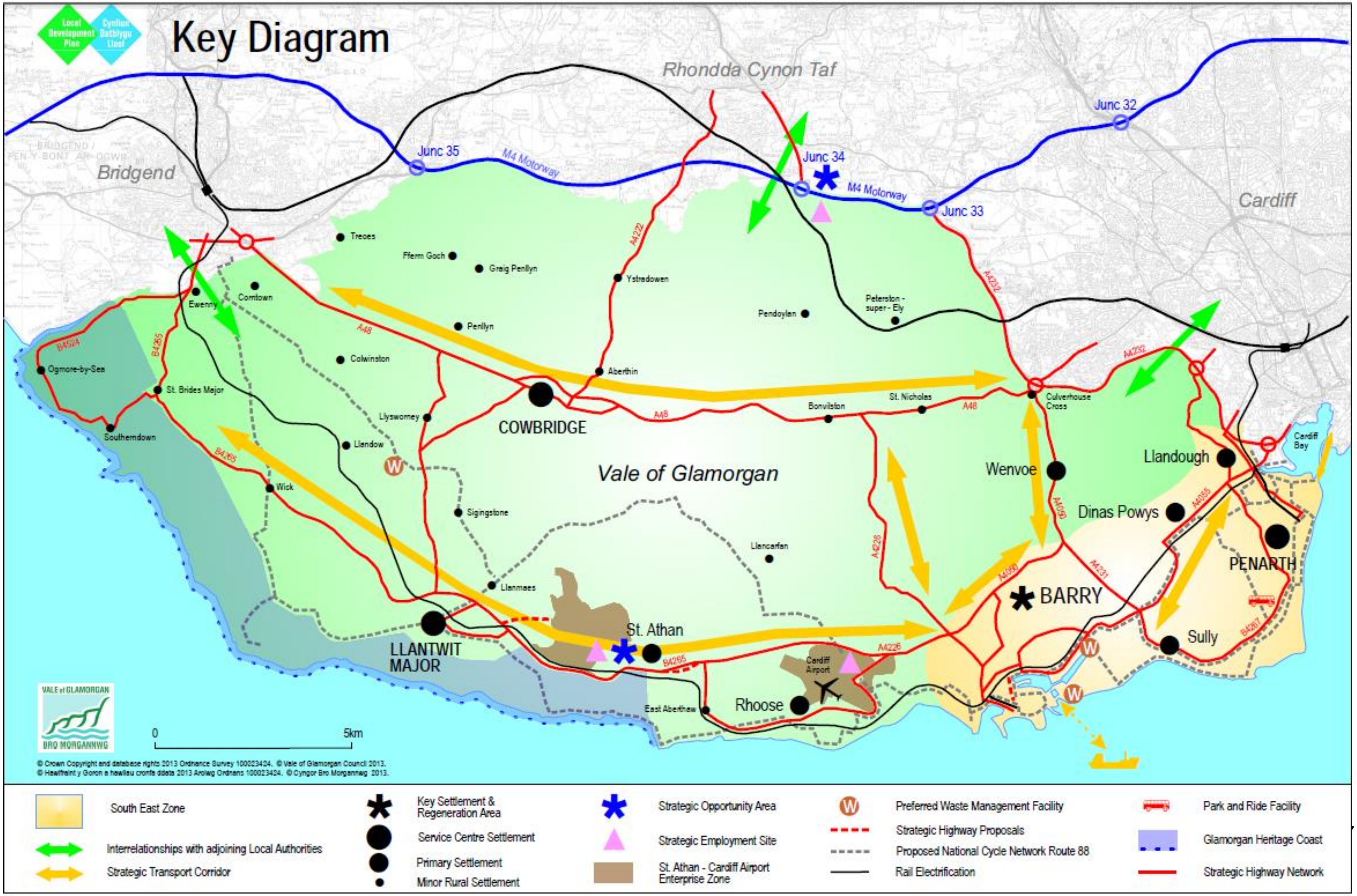
ICT infrastructure also has a significant impact on the area's economy in order to attract business and infrastructure. Residents and businesses in the Vale are amongst the first in Wales to benefit from the pioneering multimillion pound programme Superfast Cymru, bringing nationwide fibre broadband to Wales.

The use of IT also has the potential to contribute to reducing carbon emissions e.g. reducing the need to travel but has itself a carbon footprint second only to the aircraft industry.

At a national level take up of broadband by the public in Wales is lower than England, but this mainly reflects the demographic profile rather than limited access. The Vale Public Opinion Survey undertaken in 2014 showed 80% of residents use the internet which is an increase from the 72% in the 2010 survey. The biggest difference was by age with 95% of those aged under 55 using the internet but only 54% of those aged 55+ doing so. There are a range of projects being undertaken to improve digital skills and digital access across the Vale of Glamorgan, for example a number of members of the Vale's 50+ Strategy Forum are now trained digital champions who provide drop in IT sessions for older people.

ICT infrastructure is essential in attracting and enabling businesses to operate in the area but having access to the internet can also be important to an individual's well-being, both in an economic sense i.e. being able to access the best online deals etc. but by enabling people to remain socially included. This could be particularly important for older people in the Vale, particularly in the rural Western Vale where there is a risk of social isolation as identified in the Being Part of Safe and Inclusive Communities section of our assessment. Internet access and advancements in technology such as video calling can act to allow people at risk of social isolation to remain in touch with friends and family and be part of new digital communities and to access services.

Infrastructure – Our Evidence



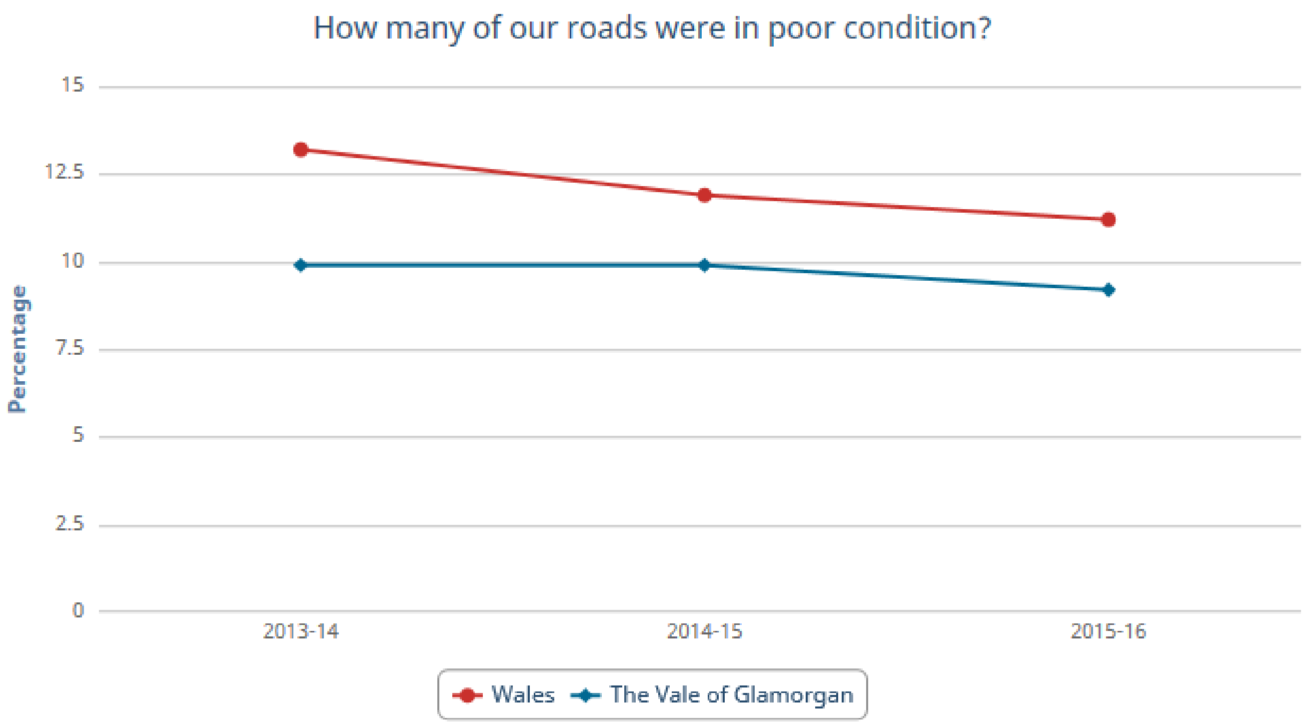
Throughout our engagement campaign the Vale's position and the infrastructure within and surrounding the Vale was seen as one of the area's greatest strength's in providing opportunities to residents.

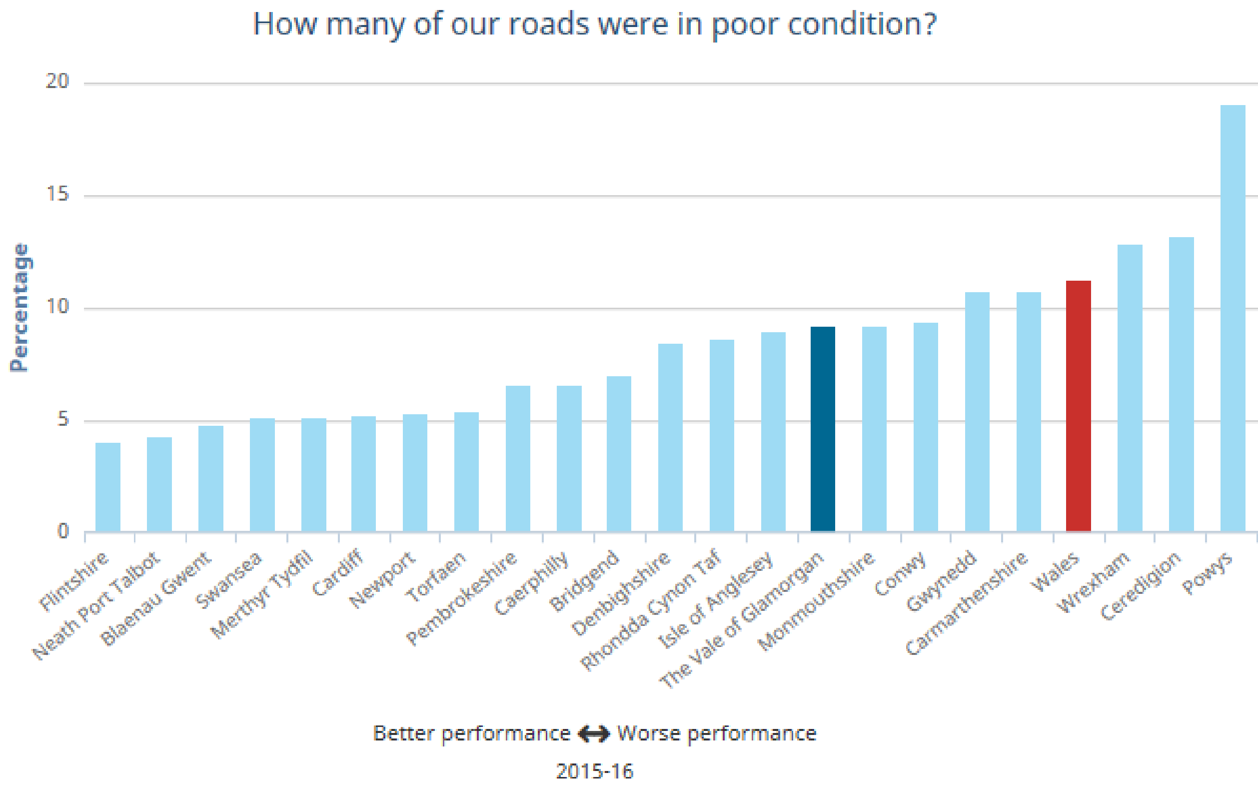
The above diagram taken from the Vale's Local Development Plan shows the location of the main infrastructure and services within the Vale. The diagram highlights both existing and proposed infrastructure sites and highlights the interrelationships with adjoining local authorities.

Transport

A sustainable transport infrastructure and services can contribute to reducing congestion, improving health and wellbeing, better access to employment, health and education and other facilities and reduce the risk of road accidents.

Roads





Car Ownership

Figure 57 - Car and Van Availability by Age in the Vale of Glamorgan[6]

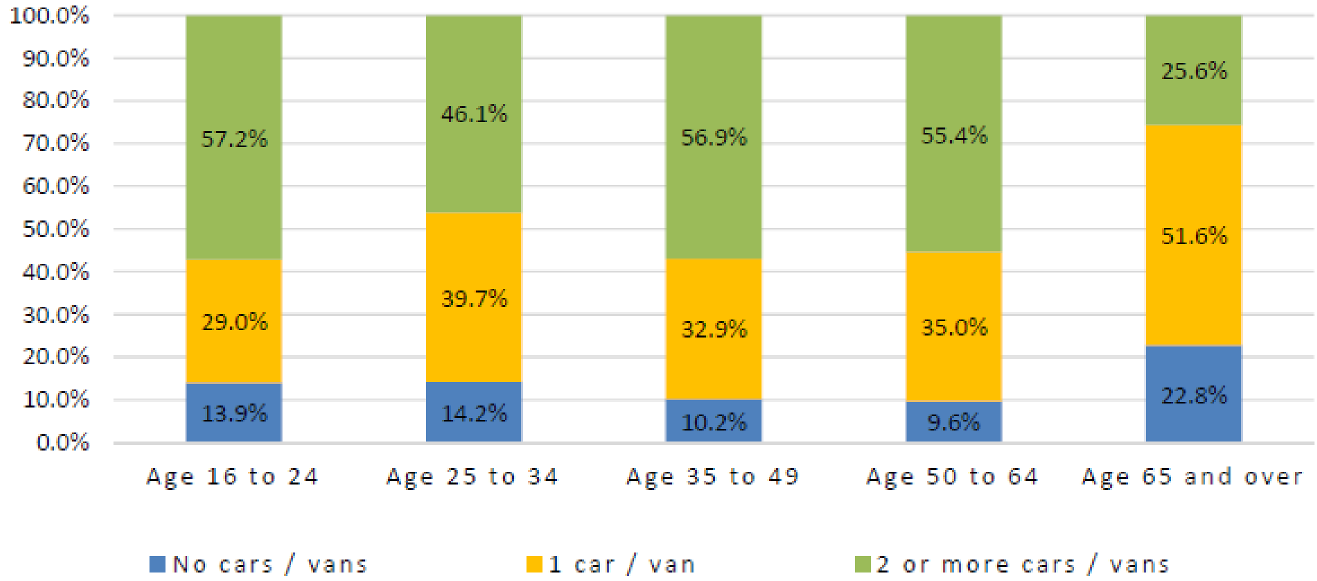
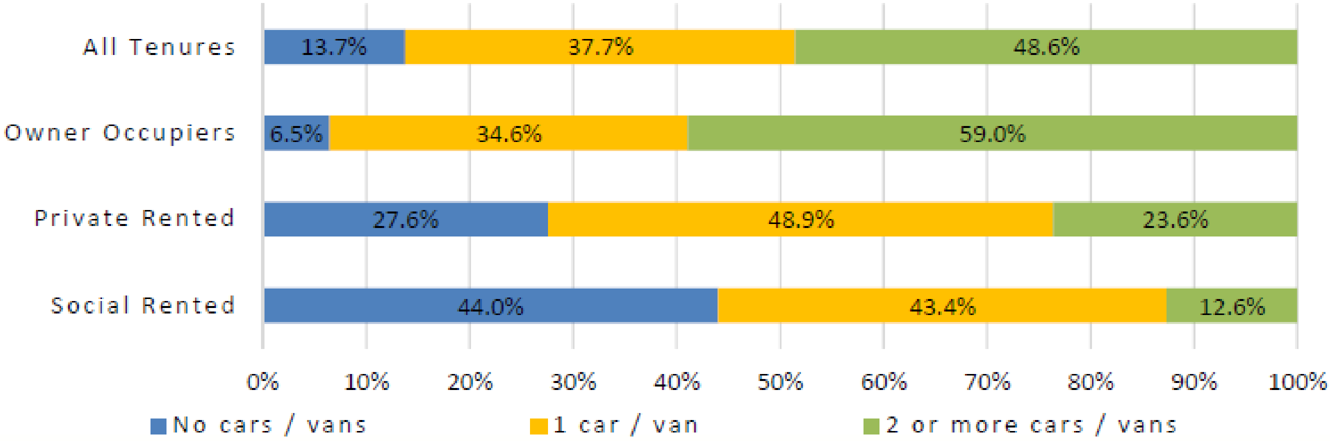


Figure 55 - Car and Van Availability by Tenure in the Vale of Glamorgan[6]



The above graphs show that car ownership is relatively high in the Vale of Glamorgan with more households owning 2 or more cars than just one car. Despite this, transport was often raised as a topic during the engagement undertaken for the assessment. Respondents wanted improvements to public transport in particular the frequency of buses and trains in rural areas although some felt there were good services. The condition of roads and pavements was also a frequently raised issue.

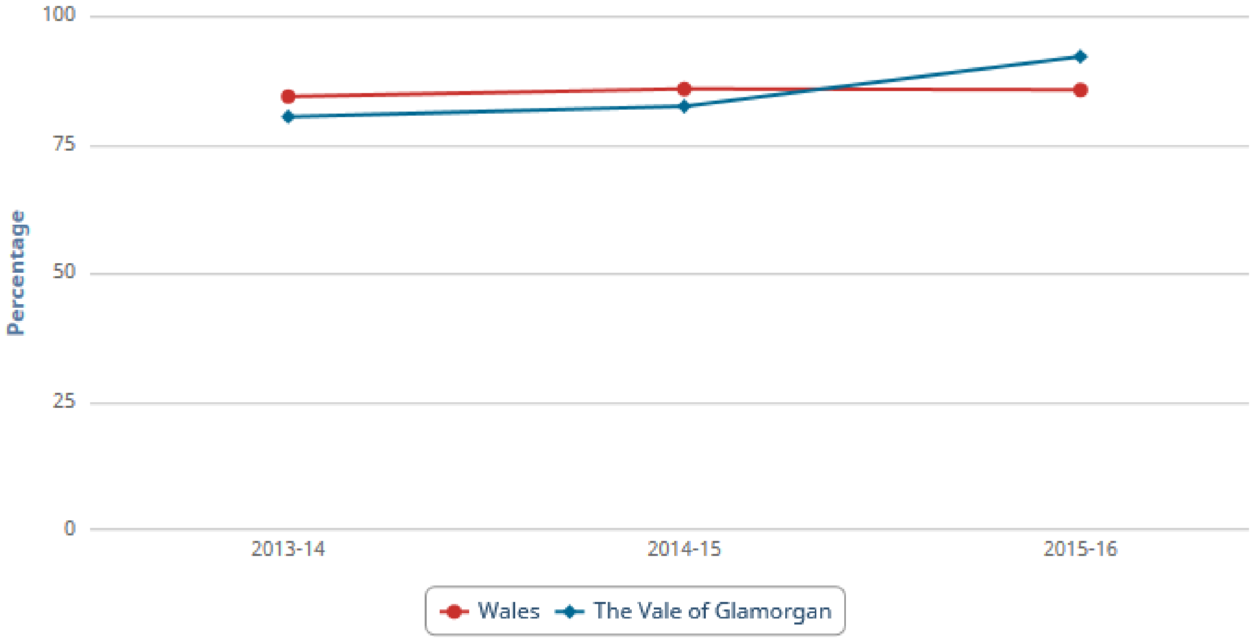
In terms of the Let's Talk survey 31.9% of respondents reported being either concerned or fairly concerned about transport costs. 18% of respondents answered that they were fairly dissatisfied, or very dissatisfied, with their "access to public transport". Respondents in the Western Vale recorded a higher rate of dissatisfaction with "access to public transport" than the other areas of the Vale of Glamorgan.

It is therefore important to recognise that for those without access to a car, reliable and affordable public transport services are a key factor in well-being by enabling people to access a range of services. It is important that services not only exist but that various routes and services connect. The PSB has highlighted that the Capital City Region project will have a major focus on improving the transport network across South East Wales and the PSB will be a key partner in working with the regional board.

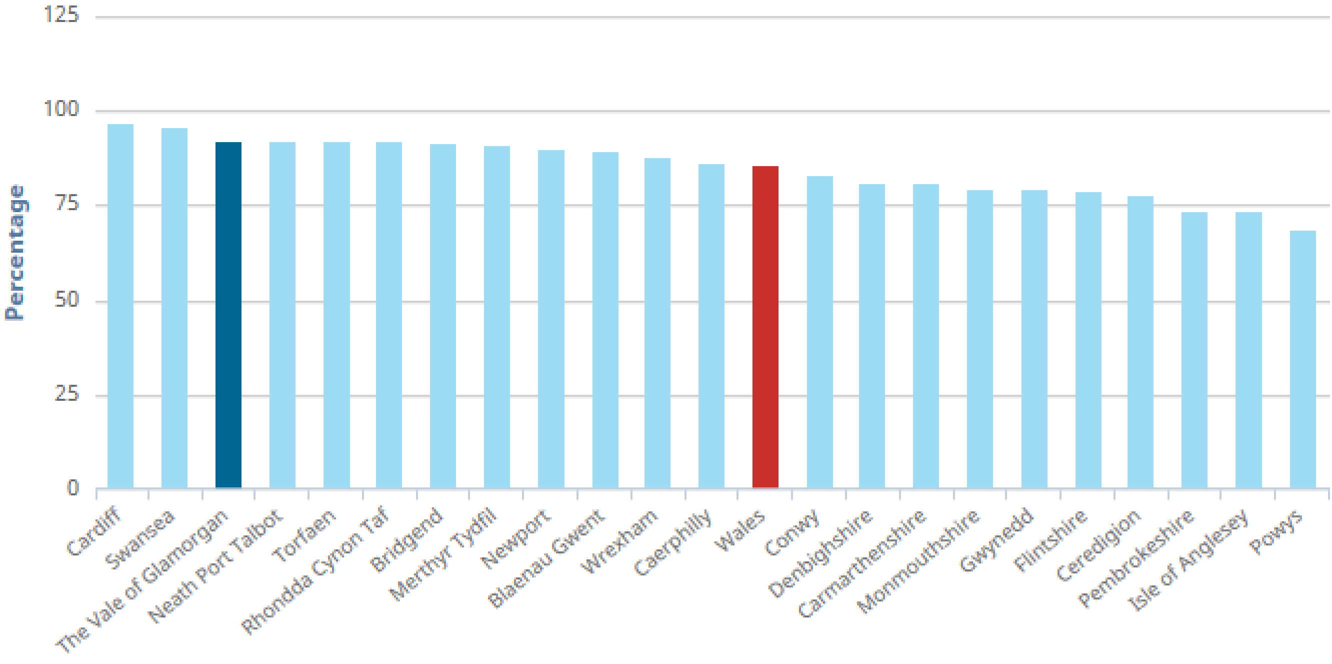
The metro vision for the capital region is for a multi-modal rapid transit network integrating all transport modules offering the passenger a single ticket 'turn up and go' experience. The metro project has been allocated £62 million for planning work and delivery of other improvements to public transport in the region.

Buses

How many people aged 60 or over have a bus pass?



How many people aged 60 or over have a bus pass?

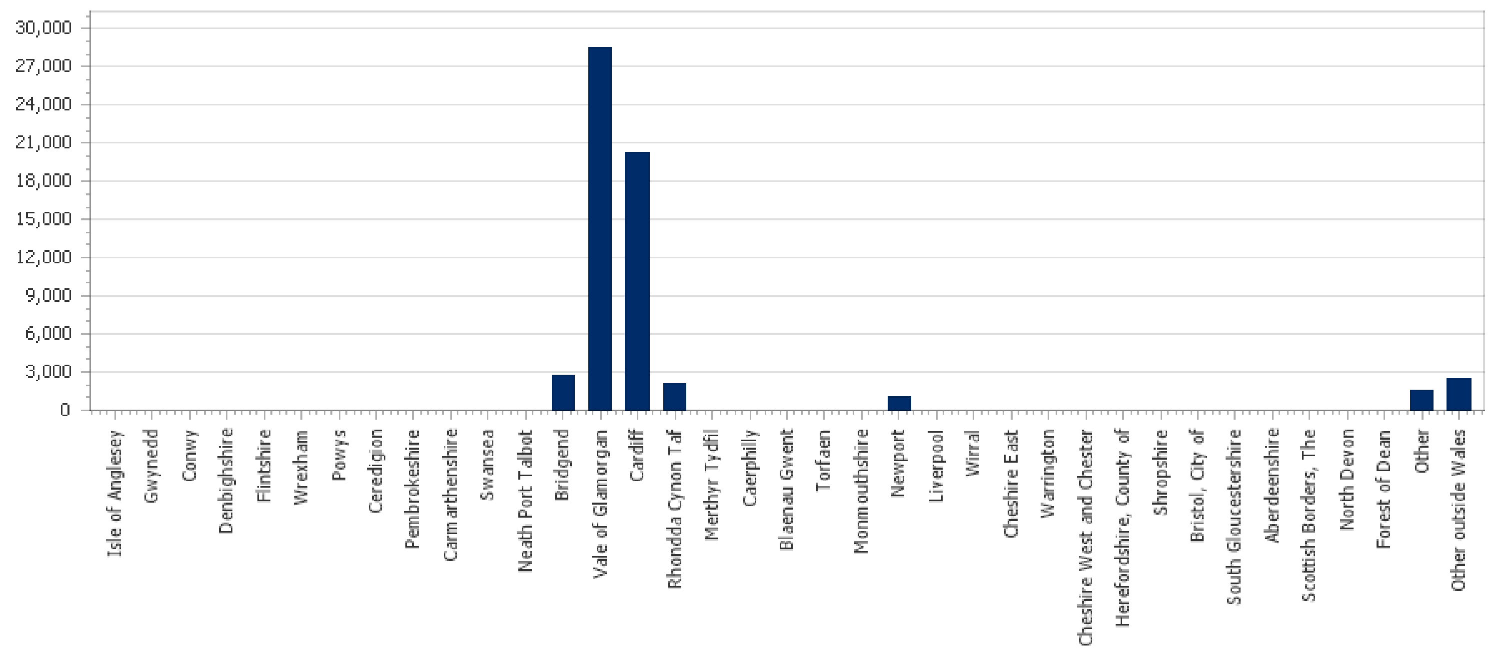


Commuting Patterns

According to the 2015 annual population survey there are 58,800 working residents in the Vale of Glamorgan. 28,500 residents work in the area and 30,300 commute out of the area. 14,300 people commute into the area. The majority commuting out of the area work in Cardiff and much smaller numbers are commuting to Bridgend and RCT.

	Total number of working residents	Total number of people working in the authority	Number of people working in home authority	Number of people commuting out of the authority	Number of people commuting into the authority
Vale of Glamorgan	58,800	42,800	28,500	30,300	14,300

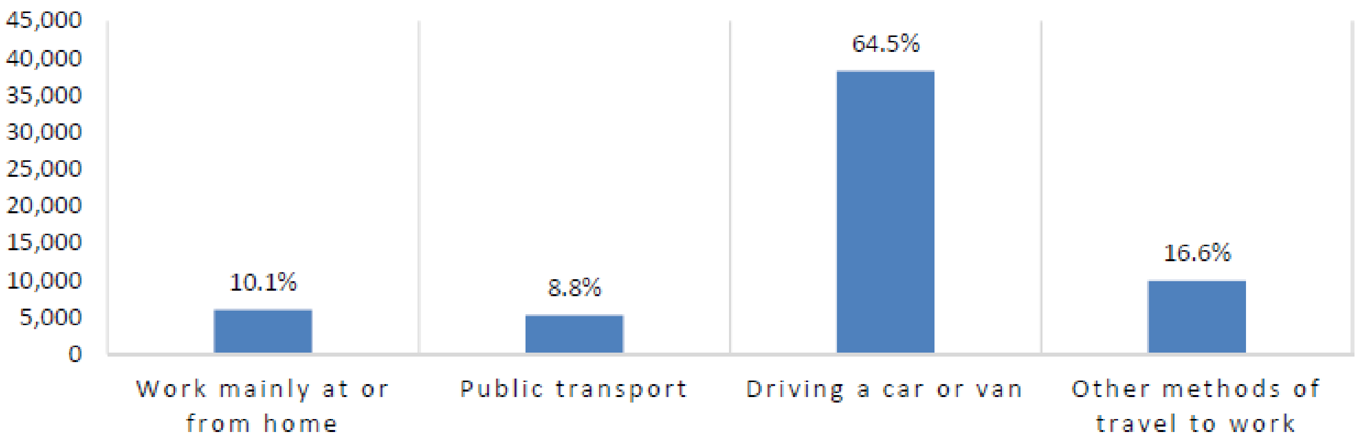
Where Vale residents work:



The following chart depicts the methods of transport used to travel to work in the Vale of Glamorgan; this dataset is only based on the number of people in employment the week before the 2011 Census and considers the method of travel to work for the longest part, by distance, of the usual journey to work.

Across the Vale of Glamorgan, most people, 64.5%, travel to work by driving, this is slightly higher than the Welsh average (63.8%) and links to the earlier evidence showing that car ownership is relatively high in the Vale. This followed by 'other methods of travel', at 16.6%, which includes traveling by motorcycle; scooter or moped, Taxi, being a passenger in a car or van, bicycle or on foot, this is lower than the Welsh average of 19%. A higher proportion of people in the Vale of Glamorgan use public transport (8.8%) and work from home (10.1%) than is seen on average across Wales.

Figure 58 - Method of Travel to Work in the Vale of Glamorgan[6]



When considering the four modes of transport used to travel to work by area perhaps the most striking trend is the near perfect inverse relationship between all usual residents aged 16 and over that use public transport to work and those that drive a car or van to work; i.e. areas where there are good public transport links exhibit much higher use of these services, whereas the rural, less well connected communities, exhibit much higher car/van usage.

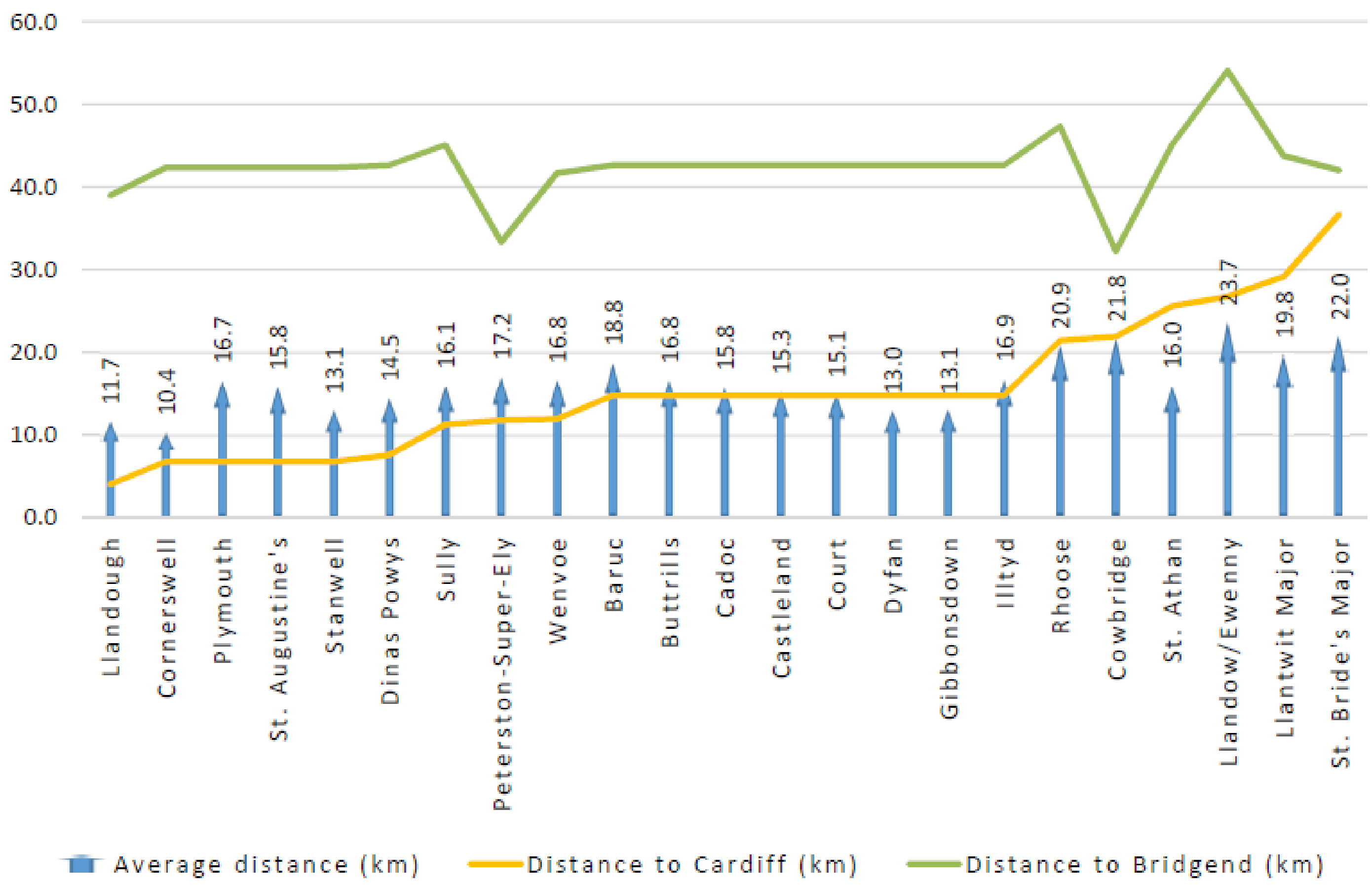
It is no surprise that the use of public transport is highest in the areas served by a train line; Dinas Powys (10.9%) and Barry (10.5%) are both above the Vale of Glamorgan average for use of public transport, which includes train and bus services. Whilst public transport is at its lowest levels in the most rural communities; less than 3% of residents in St Brides Major, Llandow/Ewenny, Cowbridge and Peterston-Super-Ely use public transport to commute to work is likely to be due to less public transport options being available.

Over 70% of residents drive to work in St Brides Major, Rhoose, Peterston-Super-Ely, Wenvoe and Sully; whereas less than 65% of residents drive to work in Barry, St Athan and Penarth and Llandough. Most notably only 38% of residents in Penarth and Llandough drive to work, almost half of the county average, this is likely to be due to the good train and bus links. Penarth and Llandough is also likely to be home to people commuting to neighbouring Cardiff for work and one would assume that it would be more time and cost effective to commute to the city using public transport that to drive and park.

Car ownership and the levels of commuting by car are highest in the rural, northern communities with less access to public transport. This has implications for new build developments in terms of parking spaces required in rural communities.

The percentage of population travelling less than 10km to work is most common in St Athan (49%), Penarth and Llandough (48%) Barry (40%), Dinas Powys (40%) and Llantwit Major (34%. The factor common to these is the proximity to a source of employment such as the St Athan Ministry of Defence Base, town and retail centres, supermarket, schools, Llandough hospital and Cardiff city centre. It is thus clear that high proportions of these residents live and work in the same vicinity.

Figure 60 - Average Distance Travelled to Work (km) by Ward[6]

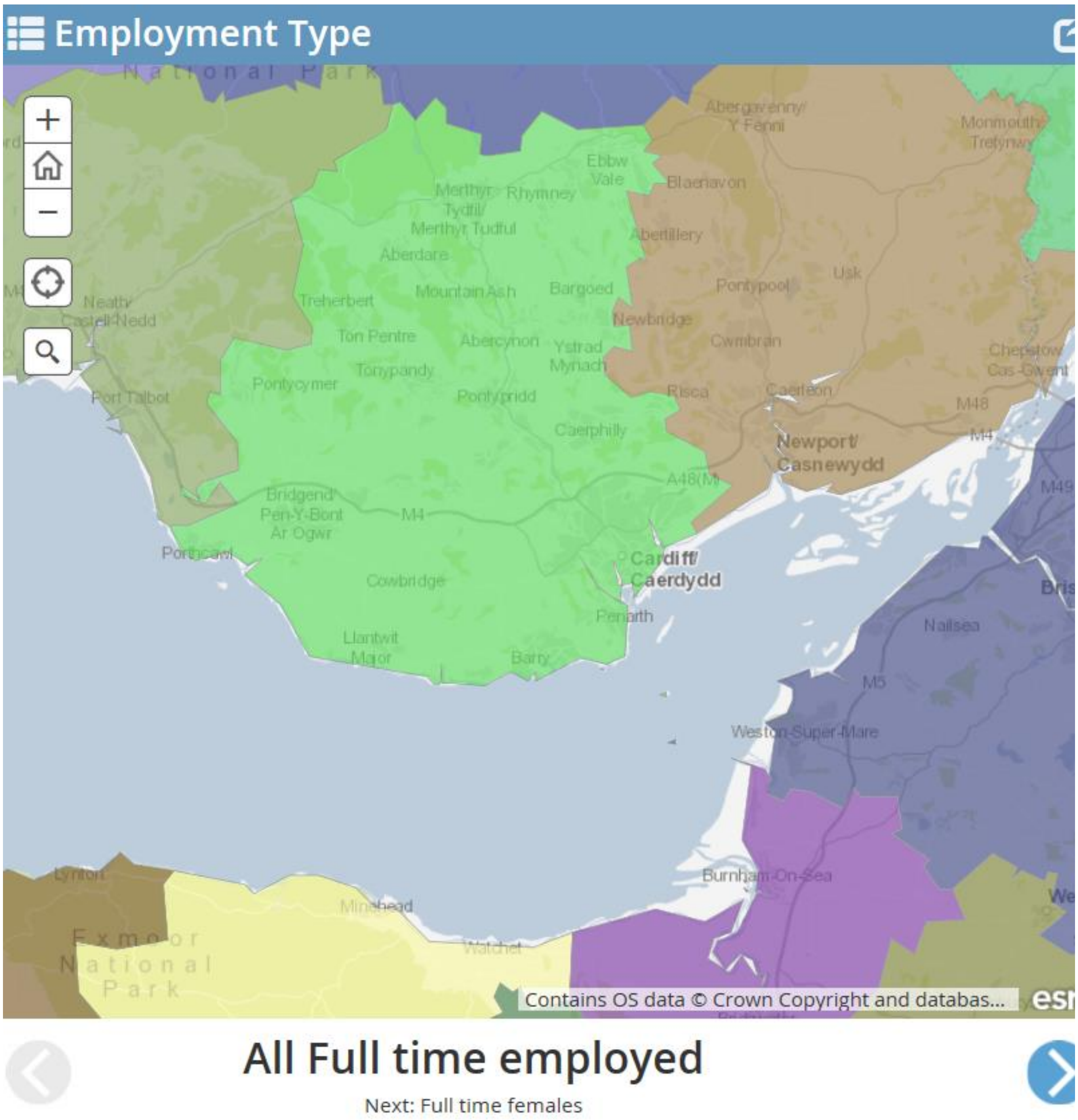


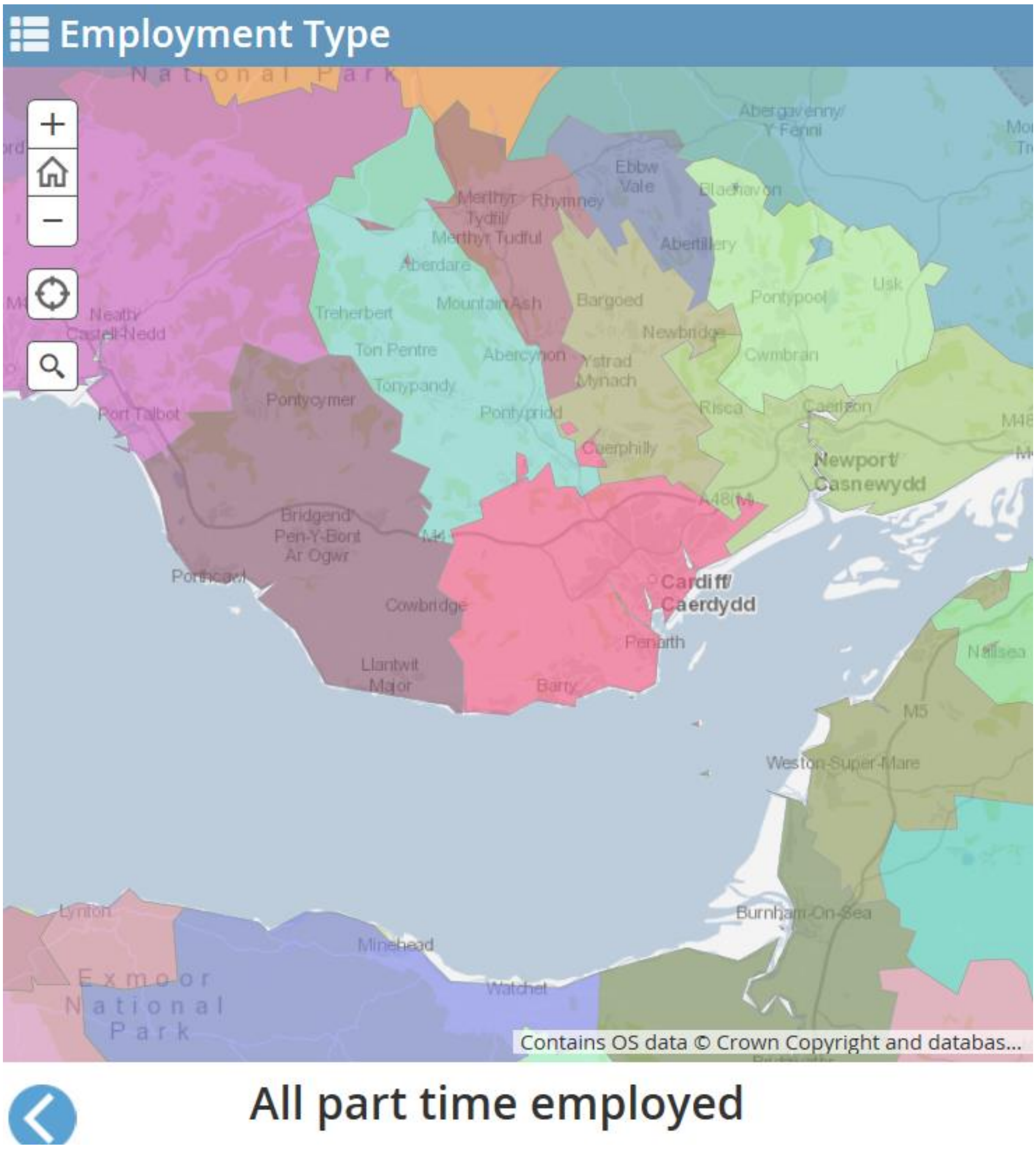
The following are experimental maps created by ONS to display alternative travel to work areas and a number of additional maps broken down by characteristics.

Trends that can be observed include:

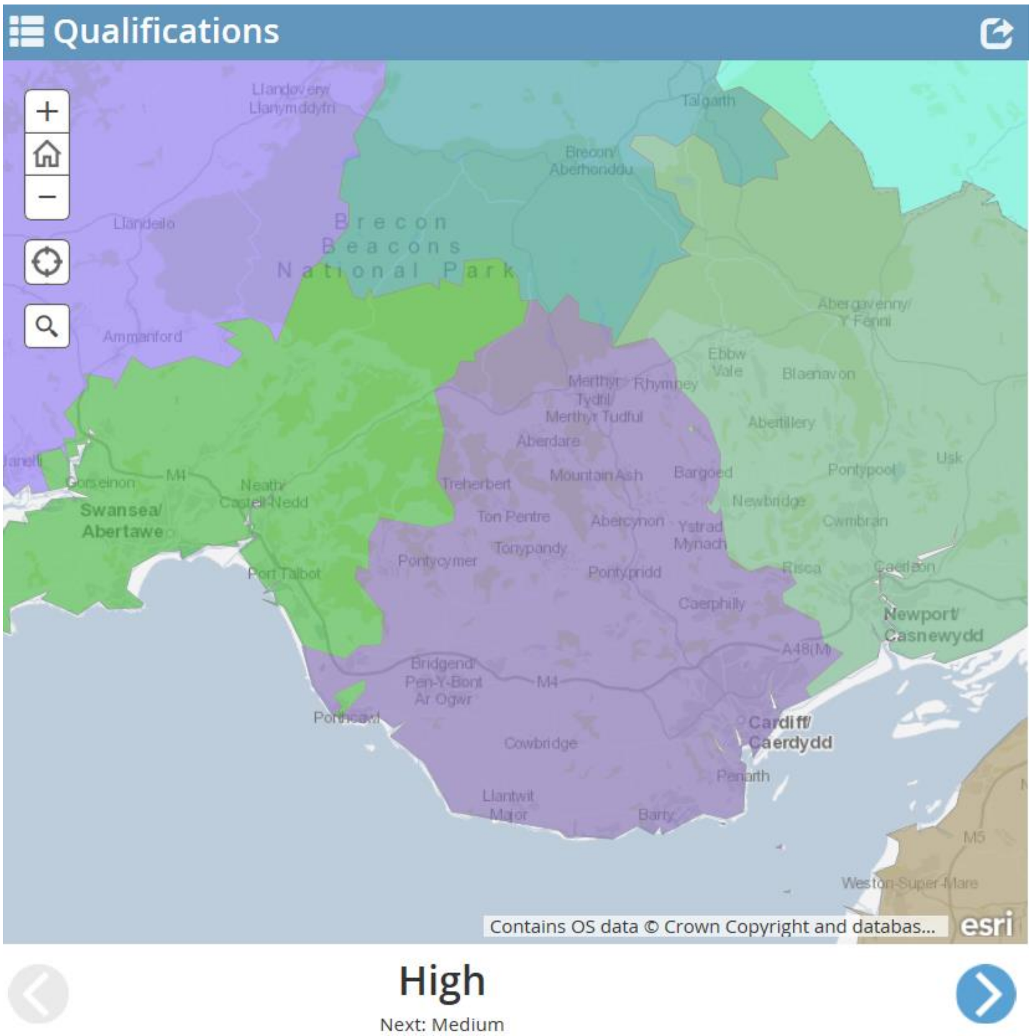
- Males travel further than females – this could be attributable to childcare arrangements
- Full time workers travel further than part time workers
- The older you get the less further you may travel to work
- Train and car drivers travel further than bus users
- Car drivers travel further than car passengers
- People with high levels of qualifications will travel further than those with lower qualification levels.

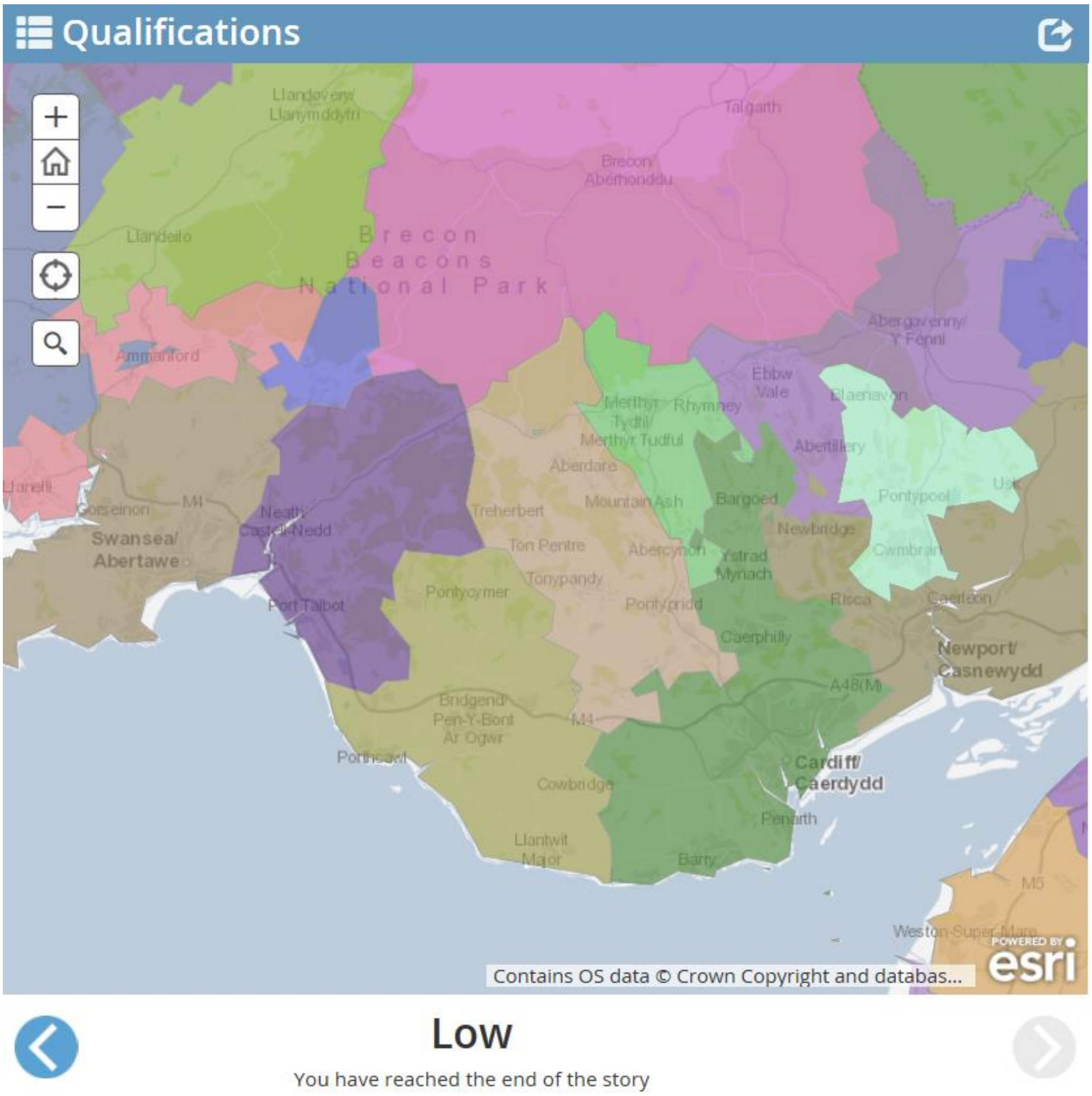
Alternative Travel to Work Areas – Employment Type




Employment Type
Abergavenny/
Y Fenni
Ebbw
Vale
Merthyr
Tydfil/
Merthyr Tudful
Rhymney
Blaenavon
Abertillery
Aberdare
Treherbert
Mountain Ash
Bargoed
Pontypool
Usk
Neath/
Castell-Nedd
Ton Pentre
Abercynon
Newbridge
Cwmbran
Ystrad
Mynach
Tonypandy
Pontycymer
Port Talbot
Pontypridd
Risca
Caerleon
Caerphilly
Newport/
Casnewydd
Bridgend/
Pen-Y-Bont
Ar Ogwr
Porthcawl
Cardiff/
Caerdydd
Cowbridge
Penarth
Nailsea
Llantwit
Major
Barry
M5
Weston-Super-Mare
Lynton
Burnham-On-Sea
Minehead
Exmoor
National
Park
Watchet
Contains OS data © Crown Copyright and databas...
All part time employed

Alternative Travel to Work Areas – Qualification Levels




Qualifications
Llandovery/
Llanymddyfri
Talgarth
Brecon/
Aberhonddu
Llandeilo
Brecon
Beacons
National Park
Ammanford
Abergavenny/
Y Fenni
Ebbw
Vale
Blaenavon
Merthyr Tydfil/
Merthyr Tudful
Rhymney
Aberdare
Abertillery
Llanelli
Gorseinon
M4
Neath/
Castell-Nedd
Treherbert
Mountain Ash
Bargoed
Pontypool
Usk
Swansea/
Abertawe
Ton Pentre
Abercynon
Ystrad
Mynach
Newbridge
Cwmbran
Tonypandy
Pontycymer
Port Talbot
Pontypridd
Risca
Caerleon
Caerphilly
Newport/
Casnewydd
A48(M)
Bridgend/
Pen-Y-Bont
Ar Ogwr
M4
Porthcawl
Cardiff/
Caerdydd
Cowbridge
Penarth
Llantwit
Major
Barry
M5
Weston-Super-Mare
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POWERED BY esri
Low
You have reached the end of the story

Local Transport Plan (LTP) 2015-30

The Local Development Plan (LDP) strategic policy in relation to transport is sustainable transport improvements that serve the economic, social and environmental needs of the Vale and priority will be given to schemes that improve highway safety and accessibility, public transport, walking and cycling.

The LTP complements the LDP and has been the subject of a Strategic Environmental Assessment. The LTP prioritises those forms of transport that are the most sustainable as identified in the following hierarchy:

- Pedestrians
- Cyclists
- Public transport
- Private motor vehicles

Objectives in the LTP include, increasing the number of cycle trips, increasing the number of park and ride spaces and users, reducing congestion and improving air quality at strategic junctions and improving accessibility to bus services.

Better conditions for pedestrians and cyclists can lead to a reduction in car use.

A reduction in car use can promote good health and wellbeing, reduce the negative impacts on the environment that car travel can bring.

A sustainable transport infrastructure and services can contribute to reducing negative impacts that cars have on the environment, reducing congestion, improving health and wellbeing, better access to employment, health and education and other facilities and reduce the risk of road accidents.

The Vale is part of the capital region which is committed to a low carbon future, which has a transport network and mobility culture that positively contributes to a thriving economy and the health and wellbeing of its citizens and where sustainable transport is the option of choice.

The metro vision for the capital region is for a multi-modal rapid transit network integrating all transport modules offering the passenger a single ticket 'turn up and go' experience. The metro project has been allocated £62 million for planning work and delivery of other improvements to public transport in the region. Initial schemes include:

- Rail infrastructure improvements
- Station upgrades
- Park and ride schemes

- Improved bus routes
- Introduction of walking and cycling schemes

Active Travel

The Active Travel (Wales) Act 2013 makes it a legal requirement for local authorities in Wales to map and plan for suitable routes for active travel, and to build and improve their infrastructure for walking and cycling every year. In response to the legislation the Council is seeking to address the transport issues in areas of inactivity within the Communities First cluster area in Barry as well as other centres of population.

In rural locations where Active Travel Schemes cannot be achieved due to the rural nature of the areas community transport and bus service provision will be promoted to support improvements in accessibility for the more vulnerable user groups.

City region

The Understanding Wales' Future report recognised that 'global drivers underline that urban agglomerations are economic magnets and Wales lacks such agglomerations, but improved internal transport links are a factor that could strengthen the economic performance of South East Wales.'

Cardiff City Region City Deal

It has been highlighted that successful completion of this project could improve GVA in Wales and reverse the difference with the UK GVA. This deal can aid Welsh companies to grow and encourage inward investment. The City Deal includes the ten local authorities of South East Wales.

The following five priorities form a major framework for City Deal economic growth:

1. Connectivity – The Cardiff Capital Region infrastructure is lagging behind the rest of the UK and connectivity has a significant impact on economic growth and performance.

2. Digital – According to ONS Wales has the lowest turnover in the digital sector in the UK, and the slowest rate of growth in the past 5 years. Cardiff Capital Region aims to regionalise resources and create a program to invest in infrastructure, skills and sector development support the digital agenda in the Region.

3. Innovation – Investment in the region is currently low. There are skilled workforces, however Innovate UK expenditure is low in Wales.

4. Skills – Whilst the Region benefits from a skilled workforce, there are currently too many people are currently working in low paid jobs. Improving skills and providing skills for access to sustainable employment will have a significant impact on the economic performance of the Region.

5. Business Support & Regeneration – Local resources need to be regionalised in respect to the following

- Business development
- Strategic transport & planning
- Marketing and tourism with dedicated funds for promotion.

Key Infrastructure Projects in the Vale of Glamorgan

The below provides an overview of the key infrastructure projects happening within the Vale of Glamorgan, or which the Vale of Glamorgan is part of. These projects will work to improve the infrastructure within the Vale of Glamorgan and both provide and improve access to employment opportunities and a range of key services.

Cardiff Capital Region Metro

The metro system could provide access to international markets at Cardiff Airport. Currently Cardiff Airport has a limited natural catchment area, however there is huge scope to grow this with appropriate investment in transport infrastructure. This could support inward investment to the Region. This suggests that there could be an increase in services to USA, some European cities and the Middle East, which will increase employment in the area and growth in direct tourism (Welsh Government, 2013).

Great Western Mainline Electrification

The main line between London Paddington and Cardiff/Swansea with investment worth £1bn. This project which will improve journey times, frequency and reliability.

Valley Lines

Valley Line Modernisation and Infrastructure and Station Improvements

- Eastern Bay Link Road, linking Cardiff Bay to A48.
- M4 Relief Roads and improvements to the M4 corridor in South East Wales.
- A465 Heads of the Valleys duelling project

The Gileston Bends Project

This project is set to improve the B4265 between Gileston and Oldmill, and improve connectivity within St. Athan and Cardiff Airport Enterprise Zone (Economic Prioritisation Framework Wales, 2015).

All of the above will enhance access to the Vale and could positively impact on inward commuting, tourism activities and inward investment.

Cardiff Airport Enterprise Zone (St. Athan MoD base, Aerospace Business Park and Cardiff Airport)

Development of a business park for aviation support services in the north of the site.

The scheme will target aviation companies and provide 46,000 sqm of accommodation (60% in refurbished hangars, 40% new build). This will also include two new access roads, linking the site with the B4265 in the west.

The St. Athan/ Cardiff Airport Enterprise Zone aims to develop the site into a centre of excellence for the aerospace industry which is internationally recognised and has particular focus on maintenance, repair and operations activities.

Key projects include:-

- The refurbishment of Building 858, Aerospace Business Park
- Improvements to the St. Athan Airfield.
- MoD are planning to base 14 Signal Regiment at the base
- Agreement secured with MoD for partial access to the Super Hangar, which enables Welsh Government commercial tenant to locate within this area. Additionally, there are ongoing negotiations for Welsh Government to have ownership of the Super Hangar by March 2017.

Within this Enterprise Zone there is predominately Aerospace activity however, there Aston Martin will set up a production plant for eco-friendly/hybrid 4x4s at the site. The production line would have demand for individuals in renewable automotive technology, automotive provision. There is scope for CAVC to provide higher-level provision in line with these developments.

Renishaw Development in Miskin
- The company purchased the 193 acre site in September 2011.
- 2012, First apprentices were recruited as part of a skills development initiative.
- 2 million sq. ft. development under development to secure long-term future.

Hinkley Point

There are potential opportunities for residents of Cardiff and The Vale of Glamorgan to travel and work at the Hinkley Point development. The Vale of Glamorgan is the closest part of Wales to Hinkley Point, less than 15 miles from the proposed new nuclear power stations, which could have a profound effect on its residents and the rest of South Wales. It is understood that discussions to support labour movement are taking place.
Major benefits from the project:-

- When operational could power 50% of UK households (3 times the scale in terms of construction as the Olympics).
- Commitment to employ 38% within 90 minute commute but if can't source will go wider
- Multiple opportunities (unemployed, SME development, long-term supply of skilled workforce, inward investment, infrastructure development.

This could enable development of provision in line with the developments in Hinkley Point and increase the footprint of CAVC students.

Barry Regeneration

The Barry Regeneration Area Partnership has agreed to focus on the following areas of development

- **Physical regeneration and tourism** (focused on Town Centre, Waterfront and Barry Island)
- **Health and Wellbeing** (focusing on housing, lifestyle and behaviours, leisure facilities)
- **Housing and Environment** (focusing on housing energy efficiency and microgeneration)

ICT Infrastructure

In addition to transport networks and industry, IT forms a key part of an area's infrastructure. Digital skills and access can provide a range of benefits to both individuals well-being in terms of being able to access online services saving time and avoiding the need to travel, stay connected to family and friends and purchase goods/ services which may be cheaper online. Residents using online services can also help public services to save money at a time of austerity. There are also multiple benefits to all size businesses, connecting the Vale's industries to the rest of the world.

The Understanding Wales' Future Report also identified that ICT has a significant potential contribution to reducing carbon by:

–Decarbonising energy production.
–Improving resource efficiency and reducing demand.
–Reducing the need to travel.
–Opportunities for home working and distributed economies.

However there is no evidence, as yet, that ICT is reducing the economic pull of urban agglomerations (see global drivers). ICT itself has a carbon footprint second only to the aircraft industry.

The report also identified that:

•Public sector support to ensure top-class access to broadband is important, but there are pitfalls to avoid

•Mobile broadband access is playing an increasing role in people's use of the internet.

•Take-up of broadband by the public in Wales is lower than England, but this mainly reflects our demographic profile rather than limited access.

•Online public service delivery has a key role in improving productivity, but current demand from the public in Wales is low, and below that in England, although ahead of Scotland.

•Welsh business is slow to make widespread use of ICT: which is a worrying indicator of general business performance.

•There is little current evidence internationally that advanced ICT is reducing the pull of cities as economic magnets, so such an impact would seem unlikely in Wales.

Superfast Broadband Coverage

Residents and Businesses in the Vale of Glamorgan are amongst the first in Wales to benefit from the pioneering multimillion pound programme Superfast Cymru, bringing nationwide fibre broadband to Wales. Fibre broadband is the next generation of broadband - much faster, more reliable and it uses a different technology.

Whilst traditional broadband is delivered via copper telephone lines, fibre broadband uses fibre optic cable. This will have the power to transform the life, work and play of citizens across the Vale of Glamorgan. What's more, Superfast broadband will boost the economy locally, enabling businesses to work more effectively in new ways and reach out to new customers.

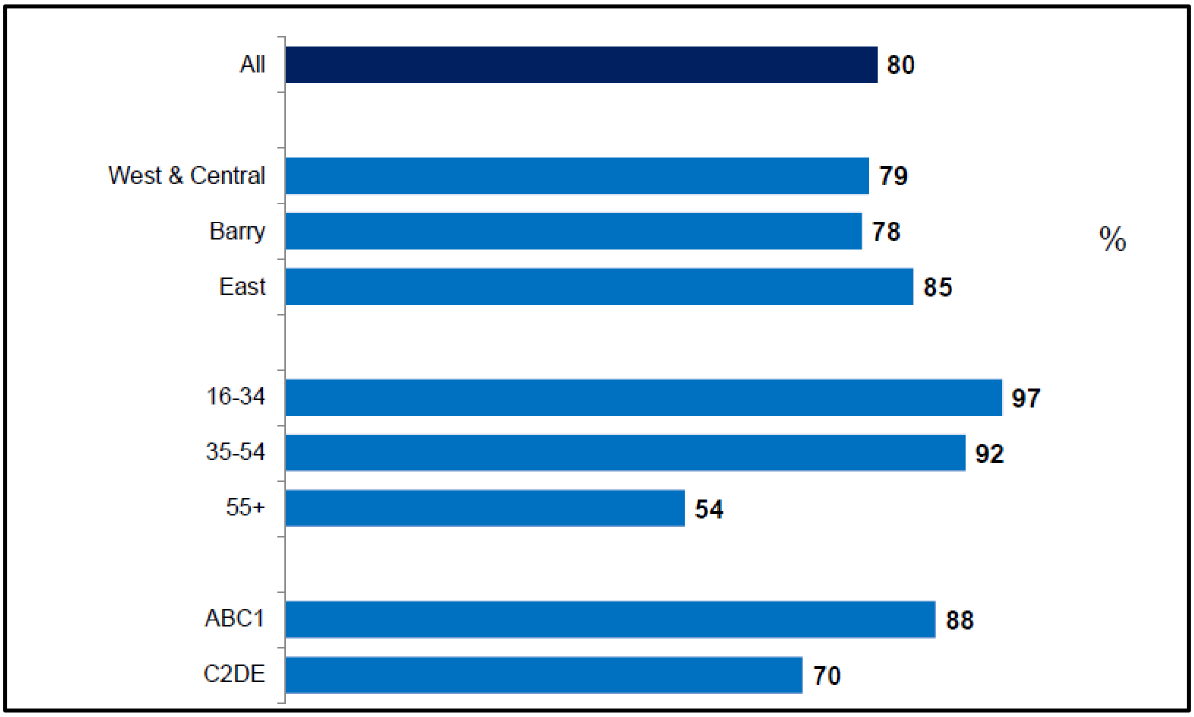
Fibre is already available in some areas including Barry, Llantwit Major and Penarth through BT's commercial rollout. Eight telephone exchanges which serve the Vale of Glamorgan will be upgraded under the Superfast Cymru programme. Areas of Cowbridge, Dinas Powys, Rhoose, Southerndown, Sully, Wick and St Athan are amongst the first communities in the Vale of Glamorgan to be able to access this new service under the programme.

Internet Use

There are a range of projects being undertaken to improve digital skills and digital access across the Vale of Glamorgan including "Get the Vale Online".

The 2014 Public Opinion Survey showed that 8 out of 10 (80%) Vale of Glamorgan residents were current users of the internet and this has grown from 72% in 2012. Access levels were relatively consistent across regions although Eastern Vale residents were slightly more likely to use the internet at 85%. The biggest differentiator in terms of internet use though was age – 95% of those aged under 55 were internet users whereas this figure dropped to 54% among those 55+. Social grade to a lesser extent also recorded differences in access with 88% of ABC1s using the internet compared with 70% of C2Des*. Those using the internet were most likely to do so at home (98%), but approaching half of users (43%) were doing so via a mobile phone or tablet.

Percentage of Vale of Glamorgan residents who currently use the internet

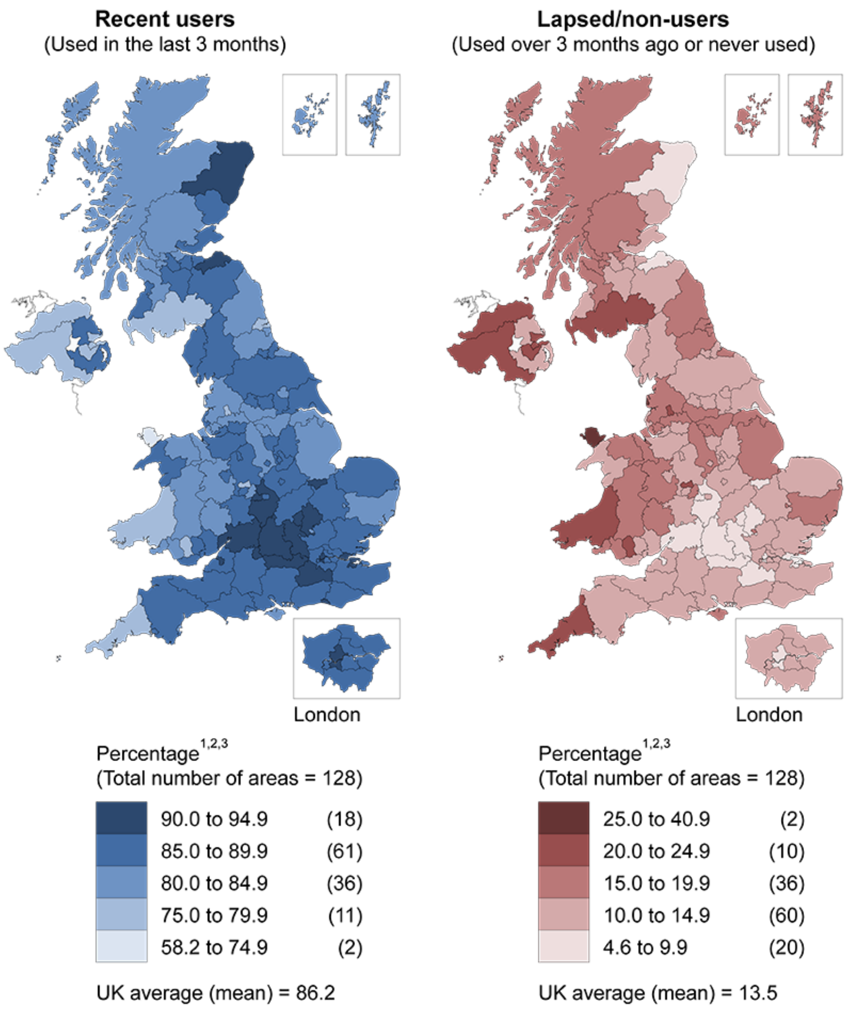


Source: Beaufort Research – Vale of Glamorgan Public Opinion Survey 2014

*ABC1 social grade classification description:

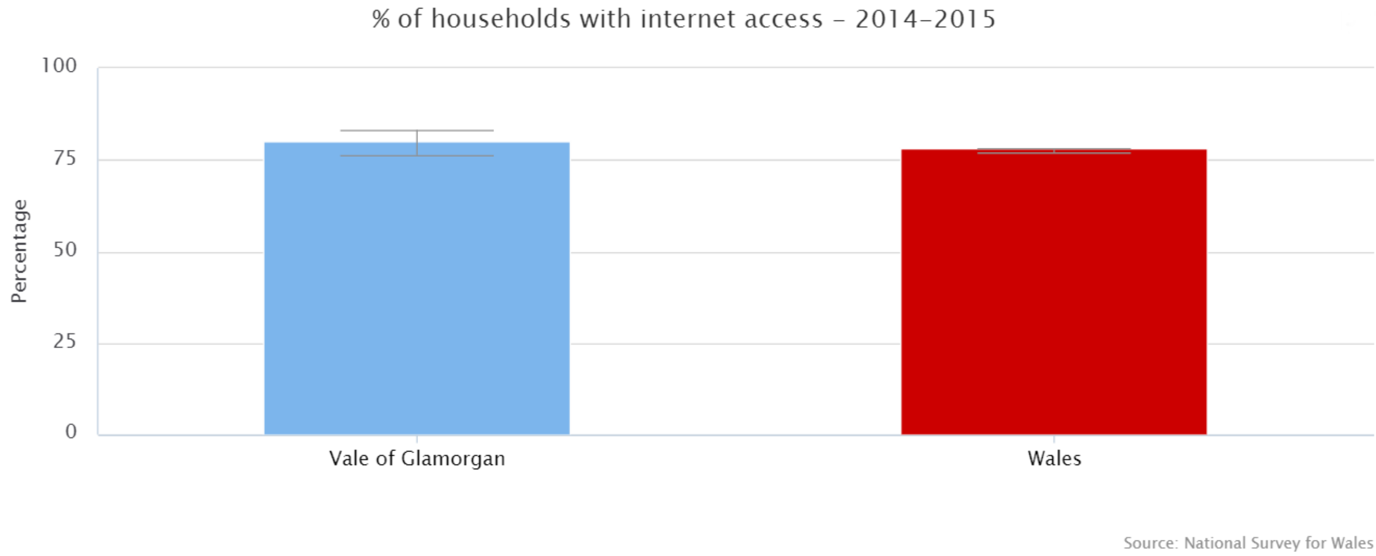
Social Grade	Occupation
A	higher managerial, administrative or professional
B	intermediate managerial, administrative or professional
C1	supervisory or clerical, junior managerial, administrative or professional
C2	skilled manual workers
D	semi and unskilled manual workers
E	state pensioners or widows (no other earner), casual or lowest grade workers

Regional evidence shows that the Cardiff and Vale area has a higher percentage of internet users when compared to other parts of Wales as displayed in the below maps.



1 Percentage of adults aged 16 or over.
2 NUTS 3 is an abbreviation for 'nomenclature of territorial units for statistics', level 3.
3 Highlands and Islands NUTS level 2 area has been used instead of the respective NUTS level 3 areas in Scotland, because of small sample sizes.
Source: Office for National Statistics licensed under the Open Government Licence v.3.0.

At a more local level, the National Survey for Wales also showed that the Vale has a higher percentage of households with internet access when compared to the national average. It is also interesting to note that analysis of the 2016 Let's Talk Survey respondent's demographics showed that a high proportion of over 55 year olds in the Vale responded to the survey online.



	Vale of Glamorgan	Wales
Value	80	78
Lower limit	76	77
Upper limit	83	78
Robustness	Estimate is precise	Estimate is precise

Culture and Tourism – Our Findings

The Understanding Wales' Future Report identifies that one of the most important factors in attracting people to help local businesses thrive is its attractiveness. Places that are attractive to the well-educated will tend to "win" and smaller urban centres will need to base their attractiveness on their overall quality of life.

Attractive places not only help attract residents but tourists and help to improve the area's economic well-being. The provision of tourist and other attractions will also contribute to the cultural well-being of an area.

The total number of visitors to the Vale of Glamorgan for tourism purposes continues to increase. Since the STEAM Tourism report was produced in 2004 to 2015, there has been an 18.5% increase in visitors to the area. In addition, there has been a 64.8% increase in the economic impact of tourism in the Vale of Glamorgan during this time period and a 10.9% increase in total employment supported by the tourism industry.

The Vale benefits from a wide range of natural assets that are valued by residents and visitors alike and our natural environment can be seen as one of biggest attractions to tourists through attractions such as the Heritage Coast and blue flag beaches. These attractions also bring about a range of health benefits showing the environment's contribution towards the well-being of our residents.

The Vale's proximity to Cardiff is also important, not only in attracting tourism, but offering cultural opportunities for residents and visitors with the Vale's proximity to Cardiff and the cultural opportunities the capital city brings highlighted as an asset during the engagement campaign. Although recognised as an asset, it should also be noted that this also provides competition.

The National Survey for Wales showed that when considering whether residents have participated in arts events, visited historic places or visited a museum in Wales, the Vale ranked highly compared to other areas in Wales across all three activities showing good participation rates in cultural activities. Analysis of this National Survey data has also shown that attendance rates were not influenced by whether a person lived in an urban or rural area.

The Let's Talk Survey asked respondents to consider how often they participated in activities such as sport, recreational activities and arts and cultural activities. Arts and cultural activities was the category respondents were least likely to say they participated in daily with most saying they participated once or twice a month. Time was highlighted as the biggest factor that stopped respondents participating more, followed by money. This was the case across all age groups with the exception of 18-24 year olds where money was the biggest barrier. A higher proportion of Let's Talk respondents identified arts and cultural activities as fairly or very important than those who said these activities were not important.

With regards to Welsh language and heritage, the Vale has a lower percentage of residents who can speak Welsh than the national average. The rate of Welsh speakers varies across the Vale with lowest rates being observed in areas of the Eastern Vale in addition to St Athan and Llantwit Major which may be attributed to the transient population in this area due to the MOD base. Let's Talk respondents were asked to consider how important a range of aspects were to them including religion, arts and culture, sport, Welsh language and Welsh culture and heritage. Welsh language was the issue that most respondents felt was not important at all and the issue that least respondents thought was fairly or very important. However, Welsh culture and heritage was identified as being fairly or very important to a high number of respondents. It is interesting to note that the survey was live during Wales' Euro 2016 football campaign.

Culture and Tourism – Our Evidence

Tourism

Attractive places not only help attract residents but tourists and help to improve the area's economic well-being. The provision of tourist and other attractions will also contribute to the cultural well-being of an area.

The total number of visitors to the Vale of Glamorgan for tourism purposes continues to increase. Since the STEAM Tourism report was produced in 2004 to 2015, there has been an 18.5% increase in visitors to the area. In addition, there has been a 64.8% increase in the economic impact of tourism in the Vale of Glamorgan during this time period and a 10.9% increase in total employment supported by the tourism industry.

The Vale of Glamorgan STEAM tourism report sets out a range of additional data in regards to tourism activity in the Vale of Glamorgan.

In order to develop the Vale's tourist economy the Council's Destination Management Plan sets out five priorities based around:

- Promotion
- Place Development
- Product Development
- Place Promotion
- Partnership and Performance.

In order to draft the plan a visitor experience assessment was undertaken and the Vale's identified strengths are outlined below.

Strengths

• Diversity of coastline including the Glamorgan Heritage Coast, the Wales Coast Path and well established seaside resorts;

• Attractive Countryside setting with country parks, distinctive rural pubs and restaurants serving high quality food and drink;

• Attractive range of serviced and self-catering accommodation ranging from major resort hotels to coastal campsites;

• Unique heritage timeline of historic features, ranging from pre-historic and Roman remains to Norman castles and Celtic churches;

• A distinct rural character and way of life on show in busy towns and villages;

• A strong activity product on land and sea – golf, sea fishing, cycling, surfing and horse-riding;

• A rich calendar of locally flavoured events and festivals;

• Expanding range of digital TIC provision at key hubs;

• Well established network of walking routes, including the Glamorgan Heritage Coast and the Wales Coast Path;

• Close proximity to the capital city of Cardiff and the strategic transport network;

• Cardiff Airport, a key international gateway, is located in the Vale;

• Reputation for staging major events e.g. National Eisteddfod 2012;

• Well established local tourism networks and effective partnership working;

• A growing reputation for quality local food and drink offer;

The assessment also identified a number of threats including the following:

• Competition from Cardiff in terms of stronger retail, accommodation, conference and events offer;

• Funding diverted to existing convergence areas and threat of loss of rural and coastal funding opportunities;

• Economic climate will constrain investment in the tourism sector and destination competitiveness will decrease compared with other destinations;

• Competition from Bristol Airport will constrain early significant growth at Cardiff Airport;

• Cuts in public transport will reduce visitor flow to and within the Vale;

• Change from grant to investment culture means could result in less funding available over the coming years.

Assets/ History

Many of the assets valued by Vale residents also attract visitors. Through the Let's Talk engagement campaign held during the summer of 2016, residents consistently highlighted the importance of the local environment and beaches and local amenities such and parks.

Barry has made significant progress in terms of regenerating the town's fabric over the past few years. Coupled with that, work within the community has facilitated a situation in which communal discussions regarding a way forward for the town are now possible, as was evidenced by the constructive discussions and comments made during the 2016 Regeneration Forum.

Recent regeneration activity in Barry has included the Town Hall, Thompson Street, Gladstone Road/Broad Street, Barry Island Eastern Shelter/Promenade, The Innovation Quarter and The Quays.

The 2016 Regeneration Forum report sets out the following in regards to the history of Barry:

"Barry grew from a small fishing village that had at one time been a holding of the De Barri family who established themselves here following the Norman incursion into Wales in 1093. Prior to that it was noted for St Baruc's, a holy establishment and shrine to the 6th Century St Baruc, who according to legend was a pupil of St Cadfan, and following misadventure and being drowned at sea, was washed ashore near the point of his well and church. This became a potent pilgrim site during the medieval period, with four visits to the shrine being equated by the Catholic Church to one visit to Rome. Before that, the land upon which Barry sits today had been part of the territory of the Silures, demonstrated by a number of forts in the area, and back into prehistory, it seems to have supported a thriving population of Bronze Age and Neolithic Farmers who have left their mark across Glamorganshire and its coast, with evidence of human habitation in the area dating back to the Paleolithic.

Before the industrial revolution transformed the fishing village into a thriving port town, the coastline here was a mecca for pirates, smugglers and wreckers, and so the area's maritime history is as layered as the Liassic limestone rock that defines much of the coastline to the west of the town.

The central character in the town's transformation is David Davies of Llandinam who built the docks in order to secure a sea channel for the coal from his mines inland in the Rhondda Valleys. This not only saw the town explode in terms of size, building and population but also in the diversity of its peoples, with mariners, sailors and dockers visiting, relocating and intermarrying with the native population. This formed the diverse community and injected the grit in Barry's soul which has seen it become a cradle for world famous activists, politicians, artists and sporting heroes.

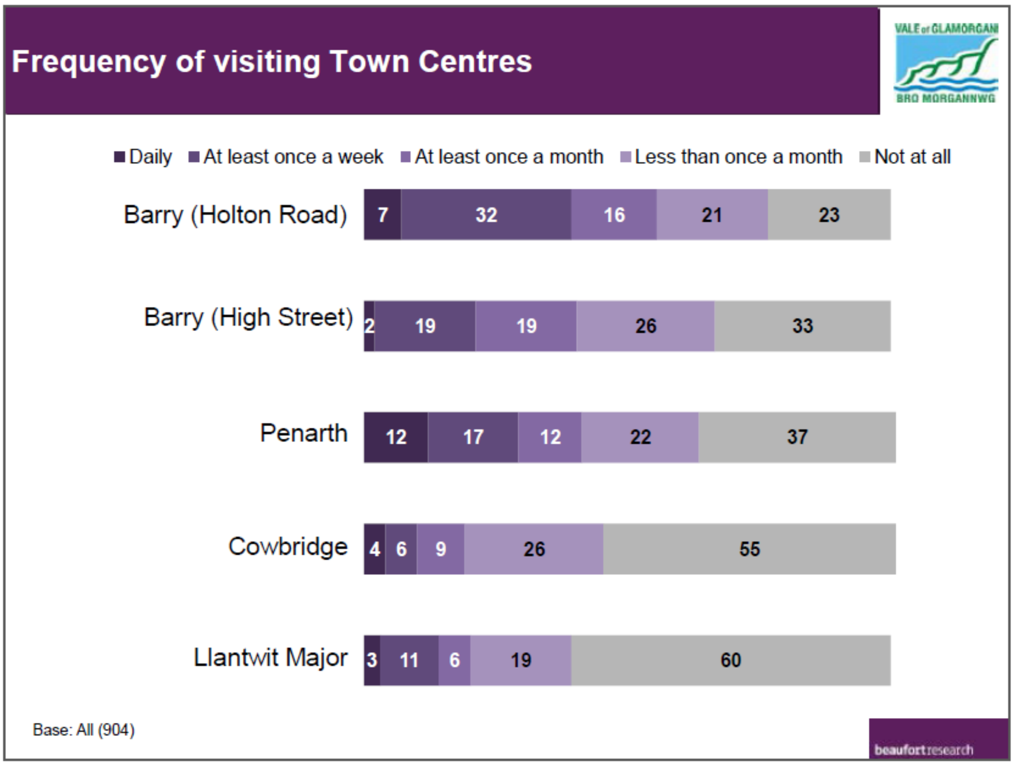
Later, the railway that dissects the town, built to carry coal also brought day-trippers from the industrial communities to the seaside, and so the local tourism industry was born. A fair and leisure amenities were developed along the Barry Island coastal strip and Butlins arrived. These days, Barry has exchanged pilgrims en route to St Baruc's for those walking in the footsteps of Gavin and Stacey, but with visitor's needs and expectations changing, with increased competition for the visitor pound and with areas of Gibbonsdown, Cadoc, Court, Castlelend and Buttrills retaining higher levels of unemployment compared to their wider geographic counterparts, the town needs a clear vision of how it can capitalise on existing assets while attracting and developing new propositions for its community and for businesses and investors."

Town Centres

There are a number of town centres within the Vale of Glamorgan, providing services to residents and attracting visitors. The main town centres in the Vale of Glamorgan are Holton Road and High Street in Barry, Penarth, Cowbridge and Llantwit Major.

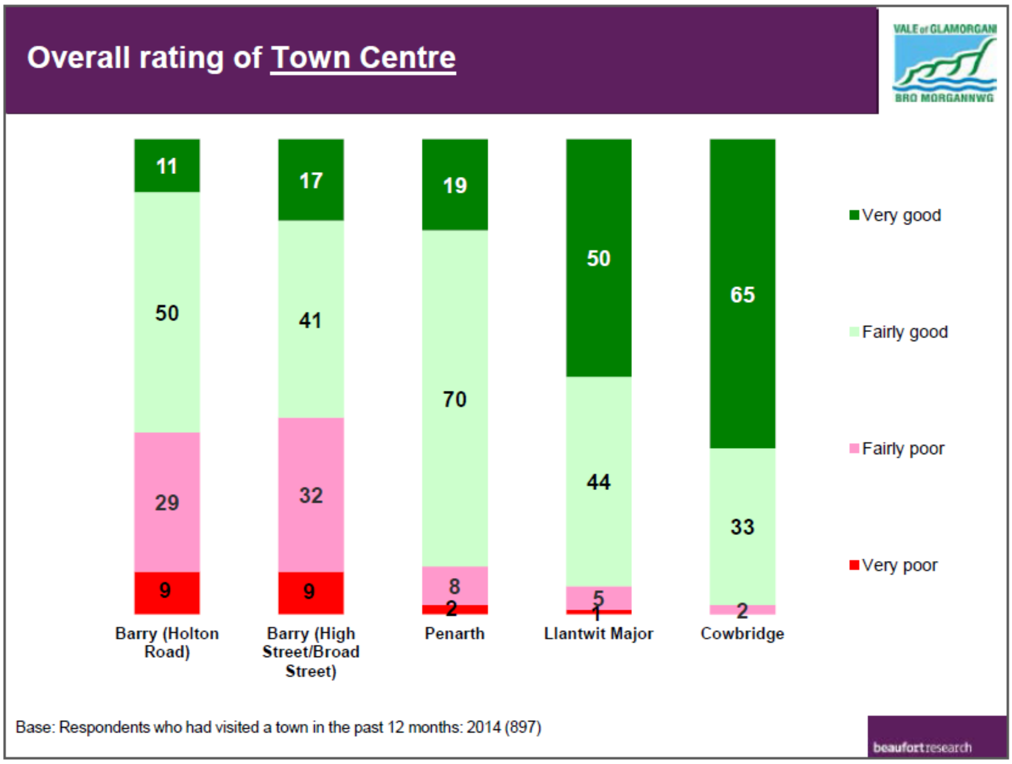
Respondents to the Vale of Glamorgan Public Opinion Survey 2014 were asked how frequently they visit various town centres in the Vale of Glamorgan. Barry (Holton Road) and Penarth were most likely to be visited on a weekly basis with 39% and 29% of residents doing so respectively.

Over half of residents in the Vale of Glamorgan did not visit Cowbridge or Llantwit major at all (55% and 60% respectively) as shown below.



Residents who had visited at least one of the town centres were asked which they had visited most often over the past year. The town centre most frequently visited was Barry (Holton Road), with over 2 in 5 residents saying they had visited the town most often. Penarth was also popular, with almost 3 in 10 residents visiting the town centre most often (28%) over the year. In contrast, a relatively small proportion of around 1 in 10 residents had visited Llantwit Major (12%), Barry (High Street/Broad Street) (10%), or Cowbridge (8%) most often in the past year.

Overall opinion of Cowbridge and Llantwit Major was considerably in excess of other town centres within the Vale. Over 9 in 10 visitors to these town centres rated it as *very* or *fairly* good (98% and 94% respectively). In contrast, opinion of Barry (Holton Road) and Barry (High St. / Broad St.) was mixed. Whilst a majority were positive, sizeable proportions (38% Barry Holton Road, 41% Barry High St. / Broad St.) believed these town centres to be *fairly* or *very poor* as shown below.



Those who said the town centre they visit most often was 'poor' were then asked to identify reasons for this. Among the main reasons given was *looks run down/shabby*, *choice of shops is poor* and *all charity shops/too many charity shops*.

When asked to provide opinion of the attractiveness of the town centre they visited most often, findings were very much in line with overall opinion with Cowbridge and Llantwit Major being viewed most favourably and both town centres in Barry receiving more mixed opinion. Penarth, whilst less likely to be regarded as *very good*, also has few visitors who think it is poor – consequently it tends to be rated as *fairly good*.

Residents were also asked to rate the accessibility of town centres for different forms of transport. *Access to bus services* and *access for pedestrians* received the most favourable ratings with around 9 in 10 or more rating each town centre as *fairly* or *very good* in this respect. *Access to trains* was also rated similarly other than in Cowbridge where there is no train station.

Access for cyclists drew a more mixed response – almost 9 in 10 (87%) thought access for cyclists was *very* or *fairly good* in Llantwit Major but this proportion dropped to 55% for Barry (High Street/ Broad Street).

Residents were most critical of *availability of car parking* in town centres particularly visitors to Penarth and Barry (High Street/ Broad Street) when only 28% and 36% respectively rated car parking favourably. Llantwit Major was, again, viewed most favourably with 88% believing that the availability of car parking was *very* or *fairly good.*

Overall opinion of different elements of Access in Town Centres - % very or fairly good

	Barry (Holton Road)	Barry (High Street/Broad Street)	Cowbridge	Llantwit Major	Penarth
Access to bus services	96%	94%	80%	95%	95%
Ease of access for pedestrians	93%	88%	91%	98%	94%
Access to train services	76%	92%	4%	95%	91%
Access for cyclists	62%	55%	68%	87%	75%
Availability of car parking	59%	36%	59%	88%	28%

The Vale of Glamorgan Council's Town Centres Framework seeks to identify the challenges facing the Vale's town centres and establishes a vision and series of strategic priorities that will help to address existing challenges and ensure that they can become more attractive and successful destinations which are enjoyed by residents, workers and visitors

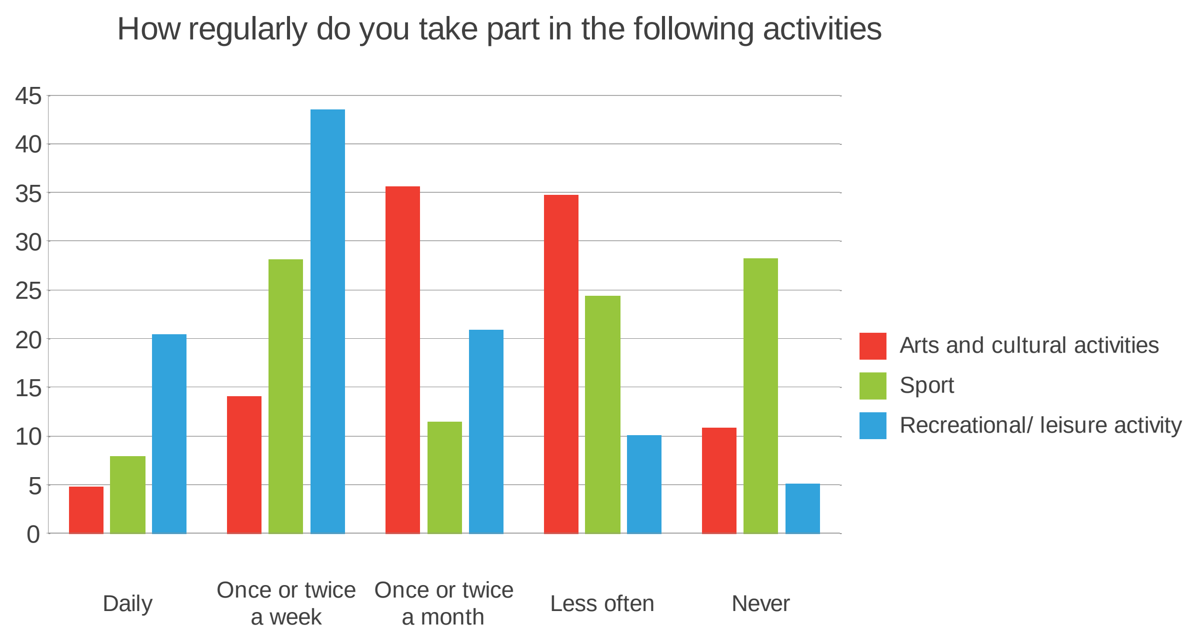
Cultural Well-being

The 2016 Let's Talk Survey asked residents to consider their cultural well-being and how they think this may change over the next 5 years.

Of the 742 respondents who answered this question assessing how cultural well-being might change over the next 5 years, the highest proportion of respondents answered that their cultural well-being would "stay the same". Of respondents: 318 (42.0%) of respondents answered that their cultural well-being would "stay the same", 237 (31.9%) answered that they did not know, 104 (14%) that it would "decrease" and only 83 (11.2%) that it would "improve".

Respondents were largely uncertain about their cultural well-being, most answered that their cultural well-being would stay the same or that they did not know about their future well-being. There is little to say whether respondents thought that their cultural well-being might improve or worse over the next 5 years.

The Survey also asked respondents to consider how often they participated in activities such as sport, recreational activities and arts and cultural activities. Arts and cultural activities was the category respondents were least likely to say they participated in daily with most saying they participated once or twice a month.

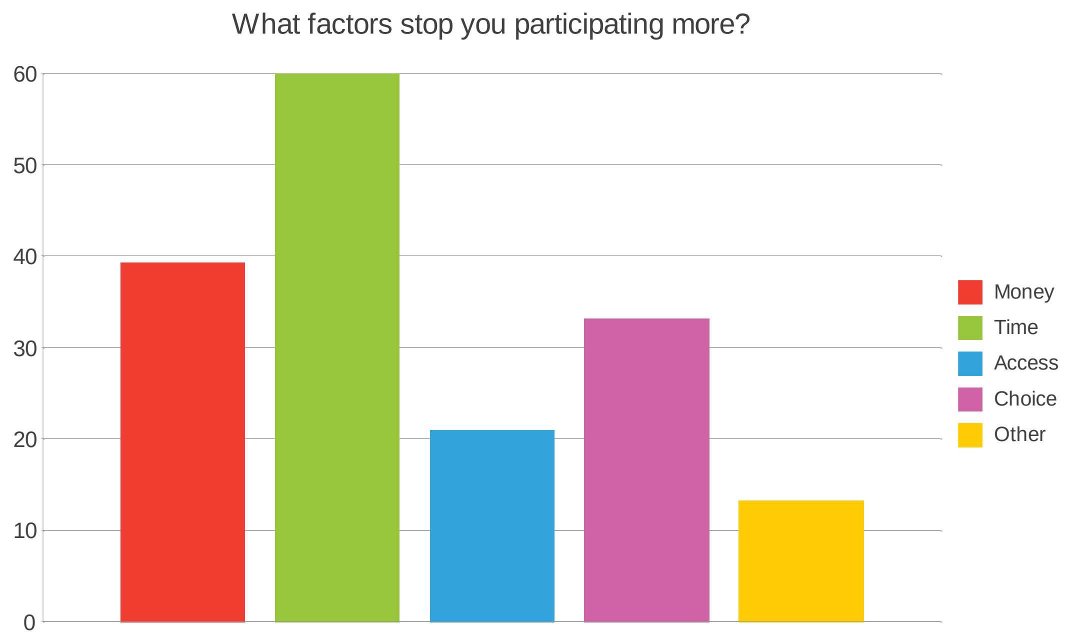


When analysed by age range, a variety of answers were given. Of those aged 55-74, 130 (36.2%) answered that they partook in arts and cultural activities “once or twice” a week. Similarly, 158 (43.4%) answered that they partook in recreational activities “once or twice” a week.

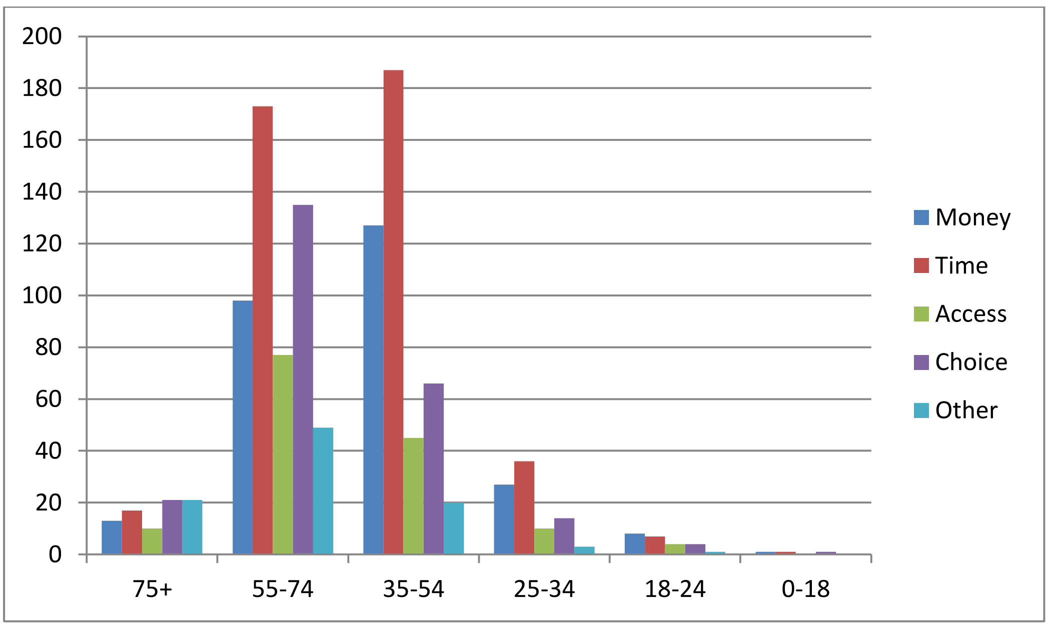
In contrast, of respondents aged between 35-54, 117 (48%) answered that they partook in recreational activities “once or twice” a week and 72 (29.6%) of respondents that they took part in sport “once or twice” a week. 94 (38.8%) of respondents aged between 35-54 answered that they partook in arts and cultural activities “less often”.

Of the answers given by those respondents aged between 25-34, 18 (40.9%) answered that they partook in arts and cultural activities “once or twice” a week; additionally, 19 (43.2%) answered that they partook in recreational activities “once or twice” a week. 14 (31.8%) of respondents aged between 25-34 answered that they partook in sport “less often”.

When asked what factors stopped them participating more, time was highlighted as the biggest factor that stopped respondents participating more, followed by money. This was the case across all age groups with the exception of 18-24 year olds where money was the biggest barrier.

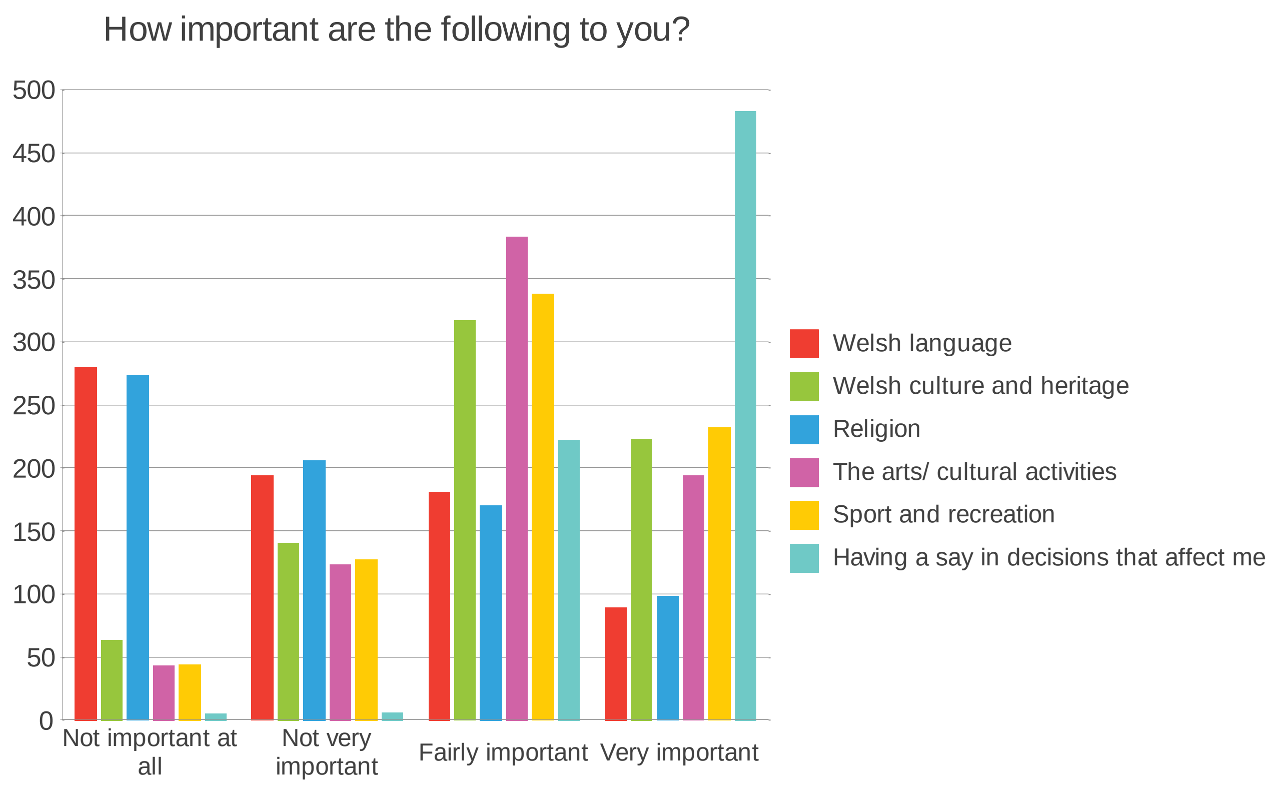


What factors stop you participating more?
60
50
40
30
20
10
0
Money
Time
Access
Choice
Other



200
180
160
140
120
100
80
60
40
20
0
75+
55-74
35-54
25-34
18-24
0-18
Money
Time
Access
Choice
Other

Let's Talk respondents were also asked to consider how important these activities and other factors regarding cultural well-being were to them including religion, arts and culture, sport, Welsh language and Welsh culture and heritage. Welsh language was the issue that most respondents felt was not important at all and the issue that least respondents thought was fairly or very important. However Welsh culture and heritage was identified as being fairly or very important to a high number of respondents. It is interesting to note that the survey was live during Wales' Euro 2016 football campaign.



Participation

The National Survey for Wales showed that when considering whether residents have participated in arts events, visited historic places or visited a museum in Wales, the Vale ranked highly compared to other areas in Wales across all three activities showing good participation rates in cultural activities. This is displayed in the following tables.

Throughout the Let's Talk engagement campaign, the Vale's proximity to Cardiff and the cultural opportunities the capital city brings was highlighted as an asset.

Have you been to any arts events in Wales, by local authority

		Have you been to any arts events in Wales					
		Yes			No		
		%	Lower CI	Upper CI	%	Lower CI	Upper CI
Local authority	Isle of Anglesey	**60**	*55*	*64*	**40**	*36*	*45*
	Gwynedd	**62**	*58*	*67*	**38**	*33*	*42*
	Conwy	**64**	*60*	*69*	**36**	*31*	*40*
	Denbighshire	**61**	*56*	*66*	**39**	*34*	*44*
	Flintshire	**56**	*52*	*61*	**44**	*39*	*48*
	Wrexham	**47**	*43*	*52*	**53**	*48*	*57*
	Powys	**58**	*53*	*63*	**42**	*37*	*47*
	Ceredigion	**62**	*57*	*66*	**38**	*34*	*43*
	Pembrokeshire	**57**	*52*	*61*	**43**	*39*	*48*
	Carmarthenshire	**60**	*55*	*65*	**40**	*35*	*45*
	Swansea	**56**	*51*	*61*	**44**	*39*	*49*
	Neath Port Talbot	**59**	*55*	*64*	**41**	*36*	*45*
	Bridgend	**58**	*54*	*62*	**42**	*38*	*46*
	Vale of Glamorgan	**61**	*56*	*65*	**39**	*35*	*44*
	Cardiff	**67**	*62*	*71*	**33**	*29*	*38*
	Rhondda Cynon Taf	**49**	*45*	*54*	**51**	*46*	*55*
	Merthyr Tydfil	**47**	*43*	*52*	**53**	*48*	*57*
	Caerphilly	**53**	*48*	*57*	**47**	*43*	*52*
	Blaenau Gwent	**46**	*42*	*51*	**54**	*49*	*58*
	Torfaen	**53**	*49*	*58*	**47**	*42*	*51*
	Monmouthshire	**61**	*57*	*66*	**39**	*34*	*43*
	Newport	**56**	*52*	*61*	**44**	*39*	*48*

Have you visited any historic places in Wales, by local authority

		Have you visited any historic places in Wales					
		Yes			No		
		%	Lower CI	Upper CI	%	Lower CI	Upper CI
Local authority	Flintshire	**69**	*52*	*61*	**43**	*39*	*48*
	Conwy	**67**	*49*	*58*	**46**	*42*	*51*
	Cardiff	**66**	*62*	*71*	**33**	*29*	*38*
	Carmarthenshire	**64**	*55*	*65*	**40**	*35*	*45*
	Monmouthshire	**64**	*65*	*73*	**31**	*27*	*35*
	Vale of Glamorgan	**63**	*49*	*58*	**46**	*42*	*51*
	Newport	**60**	*51*	*61*	**44**	*39*	*49*
	Denbighshire	**60**	*52*	*62*	**43**	*38*	*48*
	Pembrokeshire	**59**	*55*	*64*	**41**	*36*	*45*
	Merthyr Tydfil	**58**	*60*	*69*	**36**	*31*	*40*
	Neath Port Talbot	**58**	*48*	*58*	**47**	*42*	*52*
	Bridgend	**57**	*53*	*63*	**42**	*37*	*47*
	Ceredigion	**57**	*53*	*62*	**43**	*38*	*47*
	Isle of Anglesey	**57**	*59*	*68*	**37**	*32*	*41*
	Powys	**56**	*61*	*70*	**34**	*30*	*39*
	Rhondda Cynon Taf	**54**	*50*	*59*	**46**	*41*	*50*
	Wrexham	**54**	*54*	*63*	**42**	*37*	*46*
	Gwynedd	**54**	*48*	*57*	**47**	*43*	*52*
	Swansea	**53**	*38*	*47*	**57**	*53*	*62*
	Caerphilly	**53**	*47*	*57*	**48**	*43*	*53*
	Torfaen	**52**	*59*	*68*	**36**	*32*	*41*
	Blaenau Gwent	**43**	*56*	*65*	**40**	*35*	*44*

Have you visited a museum in Wales, by local authority

		Have you visited a museum in Wales					
		Yes			No		
		%	Lower CI	Upper CI	%	Lower CI	Upper CI
Local authority	Isle of Anglesey	**34**	*30*	*38*	**66**	*62*	*70*
	Gwynedd	**35**	*31*	*40*	**65**	*60*	*69*
	Conwy	**28**	*24*	*32*	**72**	*68*	*76*
	Denbighshire	**26**	*22*	*30*	**74**	*70*	*78*
	Flintshire	**31**	*26*	*35*	**69**	*65*	*74*
	Wrexham	**27**	*23*	*31*	**73**	*69*	*77*
	Powys	**35**	*30*	*40*	**65**	*60*	*70*
	Ceredigion	**42**	*37*	*46*	**58**	*54*	*63*
	Pembrokeshire	**35**	*31*	*40*	**65**	*60*	*69*
	Carmarthenshire	**33**	*28*	*37*	**67**	*63*	*72*
	Swansea	**42**	*38*	*47*	**58**	*53*	*62*
	Neath Port Talbot	**33**	*29*	*38*	**67**	*62*	*71*
	Bridgend	**39**	*35*	*43*	**61**	*57*	*65*
	Vale of Glamorgan	**47**	*42*	*52*	**53**	*48*	*58*
	Cardiff	**54**	*49*	*59*	**46**	*41*	*51*
	Rhondda Cynon Taf	**39**	*34*	*43*	**61**	*57*	*66*
	Merthyr Tydfil	**49**	*45*	*53*	**51**	*47*	*55*
	Caerphilly	**40**	*35*	*45*	**60**	*55*	*65*
	Blaenau Gwent	**32**	*28*	*36*	**68**	*64*	*72*
	Torfaen	**38**	*34*	*42*	**62**	*58*	*66*
	Monmouthshire	**42**	*37*	*47*	**58**	*53*	*63*
	Newport	**45**	*40*	*49*	**55**	*51*	*60*

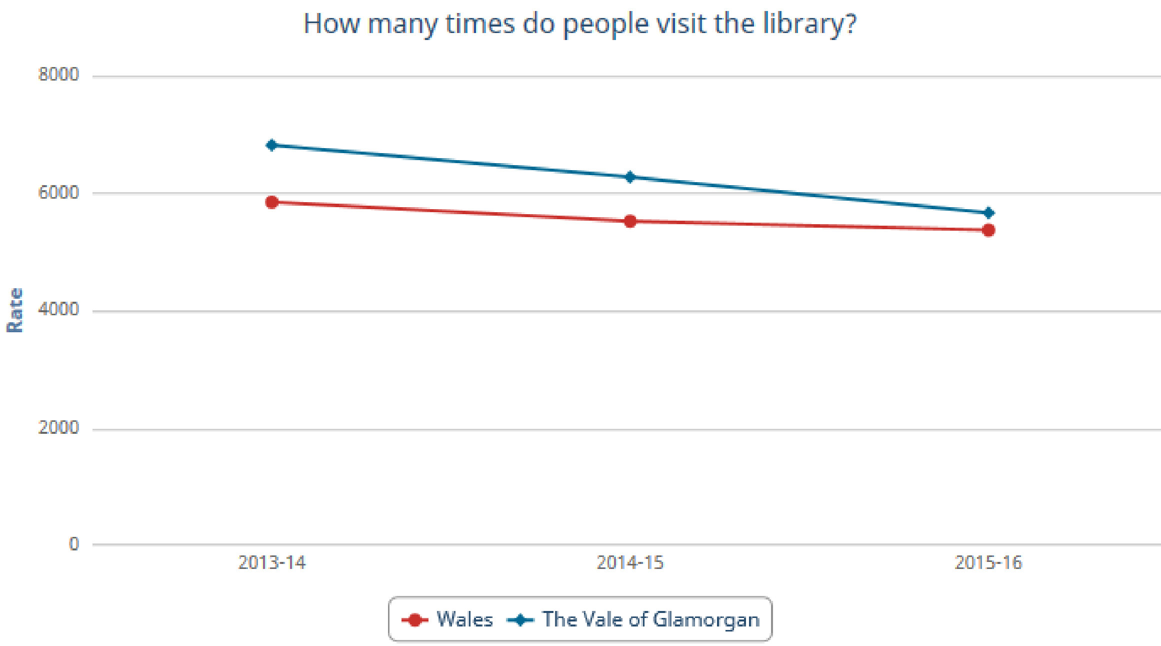
Data from the Arts Council for Wales also highlights that the area has a relatively high partition level. The Vale of Glamorgan falls into the 'South Central' Region and 81.6% of adults and 89.2% of children and young people in this region attended an arts event in 2015.

50.7% of adults and 89.7% of children and young people participated in artistic activity within this region in 2015 and 87% in this region agree that it is right that there should be public funding of the arts and council projects.

25% of people find the cost of attending or participating in the arts a barrier in this region.

Libraries

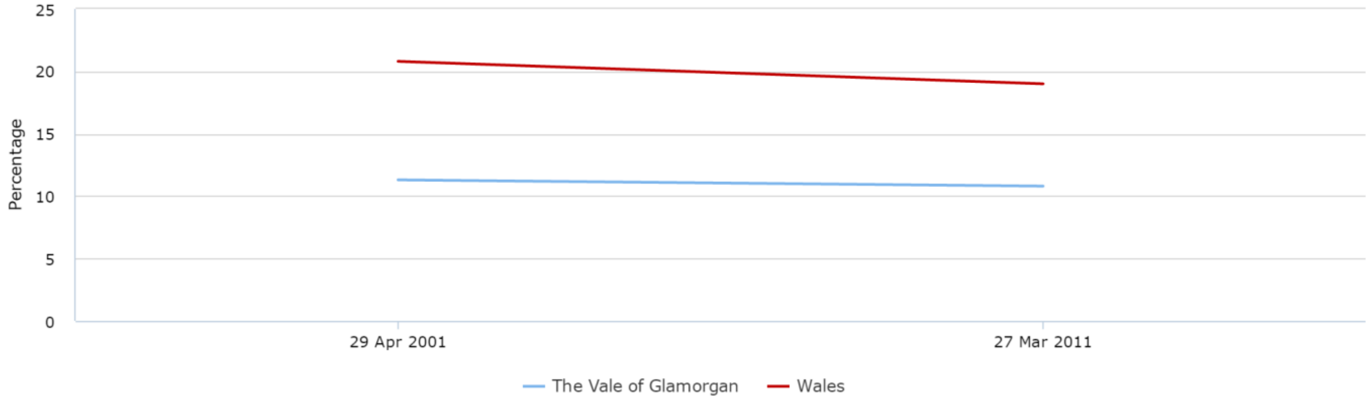
The National Survey for Wales shows that people in the Vale of Glamorgan visit libraries on average slightly more times than the Welsh average.



Welsh Language

The Vale has a lower percentage of residents who can speak Welsh than the national average. The rate of Welsh speakers varies across the Vale with lowest rates being observed in areas of the Eastern Vale in addition to St Athan and Llantwit Major which may be attributed to the transient population in this area due to the RAF base.

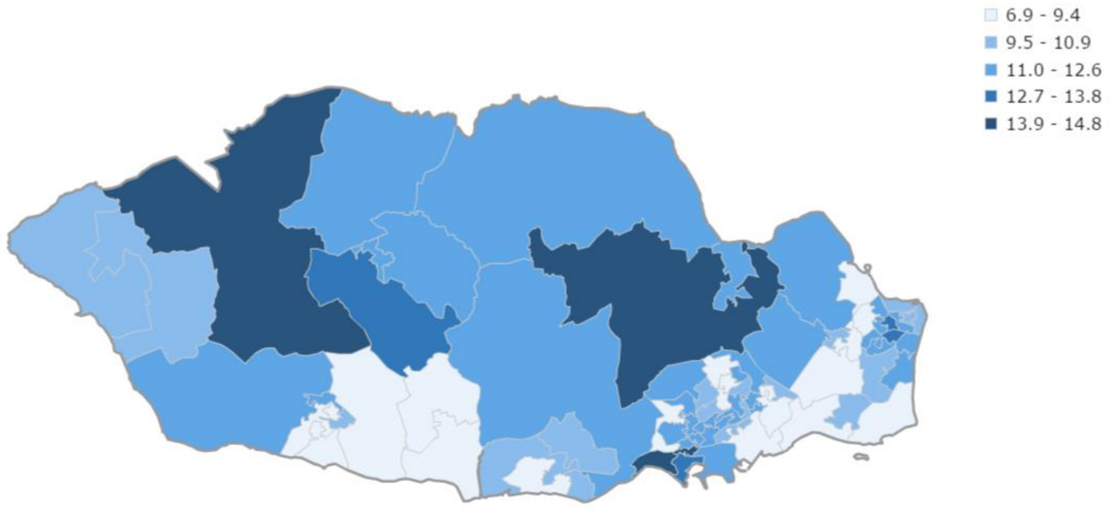
% of people aged 3+ who can speak Welsh



	The Vale of Glamorgan	Wales
29 Apr 2001	11.3	20.8
27 Mar 2011	10.8	19.0

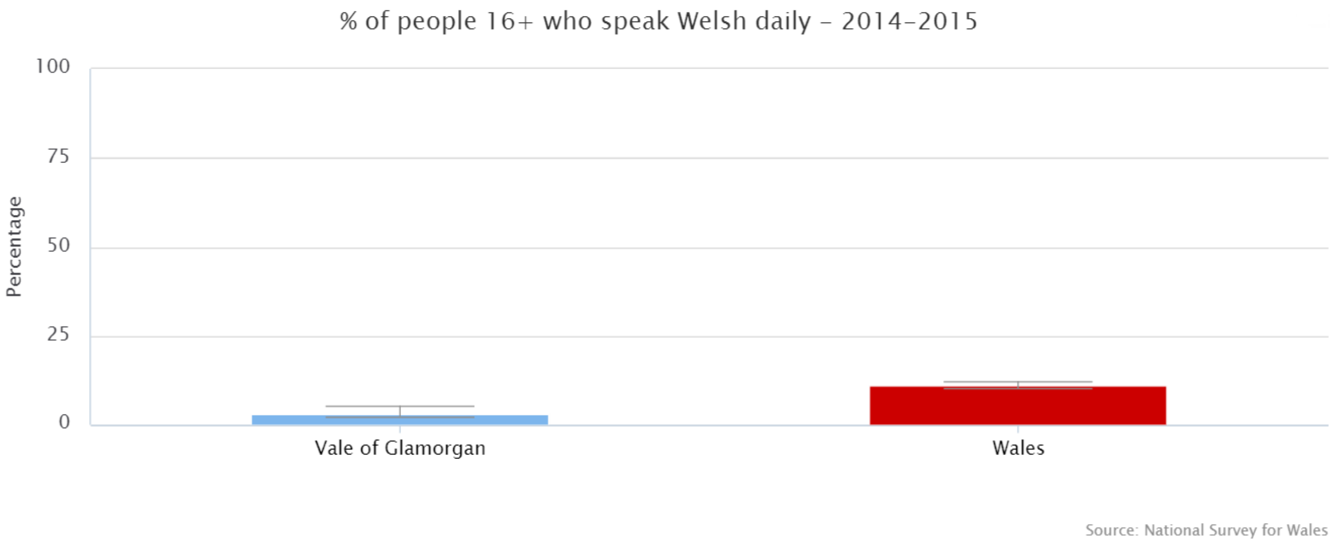
Source: Office for National Statistics (ONS)

% of people aged 3+ who can speak Welsh, 27 Mar 2011

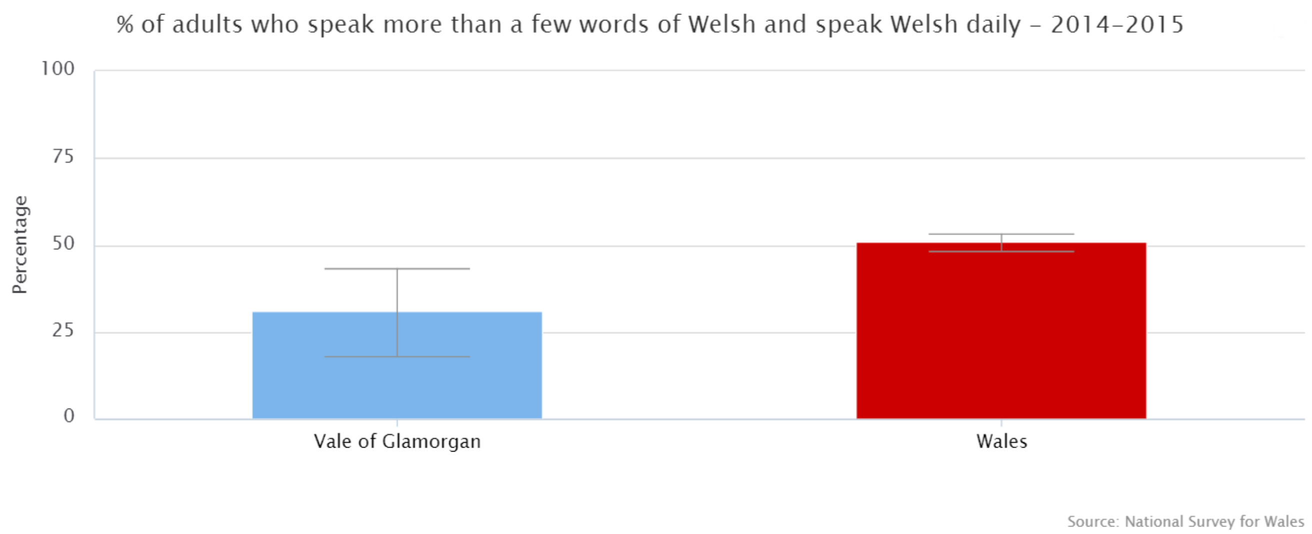


Vale of Glamorgan, Lower Super Output Area

Source: Office for National Statistics (ONS)



	Vale of Glamorgan	Wales
Value	3	11
Lower limit	2	10
Upper limit	5	12
Robustness	Estimate is not reliable	Estimate is precise



	Vale of Glamorgan	Wales
Value	31	51
Lower limit	31	48
Upper limit	43	53
Robustness	Estimate is not reliable	Estimate is precise

Maximising Opportunities and Attainment – A Summary

Overall the Vale of Glamorgan is an area with good levels of educational attainment with higher than average incomes and employment rates. However, as with a range of other indicators considered throughout this assessment there are clear areas particularly in the Eastern part of Barry where educational attainment is lower and this can be linked to lower incomes and levels of employment.

In order to ensure our population are given the best possible chance to maximise their opportunities having a good education is of upmost importance. Education acts as the key foundation for the economic success of not only individuals but of the area as well. Education acts as a foundation for employment which offers a high level of protection against poverty, and particularly against deep and persistent poverty (and also contributes directly to well-being). The same areas within the Vale of Glamorgan experience deeply entrenched norms of lower educational achievement, lower employment rates and lower incomes and the influence of socio-economic factors in the early years can be crucial in determining the life chances and opportunities of our future generations.

One of the major challenges is helping our residents not just obtain employment but sustaining that employment which leads to in-work progression helping to secure a better future. The Vale's location could be considered one of its greatest assets in maximising the economic well-being of our residents and the area. The Vale is part of the Capital City Region and five priorities have been identified for economic growth; connectivity, digital, innovation, skills, business support and regeneration. A number of infrastructure projects will help support economic growth in the Vale and wider region including, the Great Western mainline electrification, Cardiff Capital Region Metro and the Cardiff Airport and St Athan Enterprise Zone.

Transport was an issue raised during our engagement and the PSB is mindful of the need to have due regard to the capital region and the metro scheme when planning any activities.

Finally It could be suggested that the Vale is in a unique position to help residents maximise their opportunities. The Vale is an area with good transport links into Cardiff which provides a wealth of economic and cultural opportunities, but is also an area with a rich natural environment as one of its biggest assets. The natural environment attracts visitors further enhancing the area's economy but also provides a range of well-being benefits to residents and is part of the culture of the Vale.