

Attracting Talent:

Extended analysis of internal
migration patterns in Wales

Welsh Assembly Government

Internal migration patterns in Wales

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Appendix A: Mosaic Public Sector – Group and Type Descriptions

Introduction

In October 2006 Experian reported on the findings of its “Attracting Talent” migration study. This study utilised both National Statistics and Experian’s proprietary datasets to build a comprehensive picture of migration patterns and trends in the UK. The study went on to consider the economic impacts and possible policy implications of such migration trends.

In a recent presentation of the findings from the Attracting Talent study to the Economic Research Advisory Panel (ERAP), it was noted that the data provided by Experian appeared to suggest a disproportionate inflow of people into Wales that are from relatively disadvantaged groups, as illustrated by the figure below.

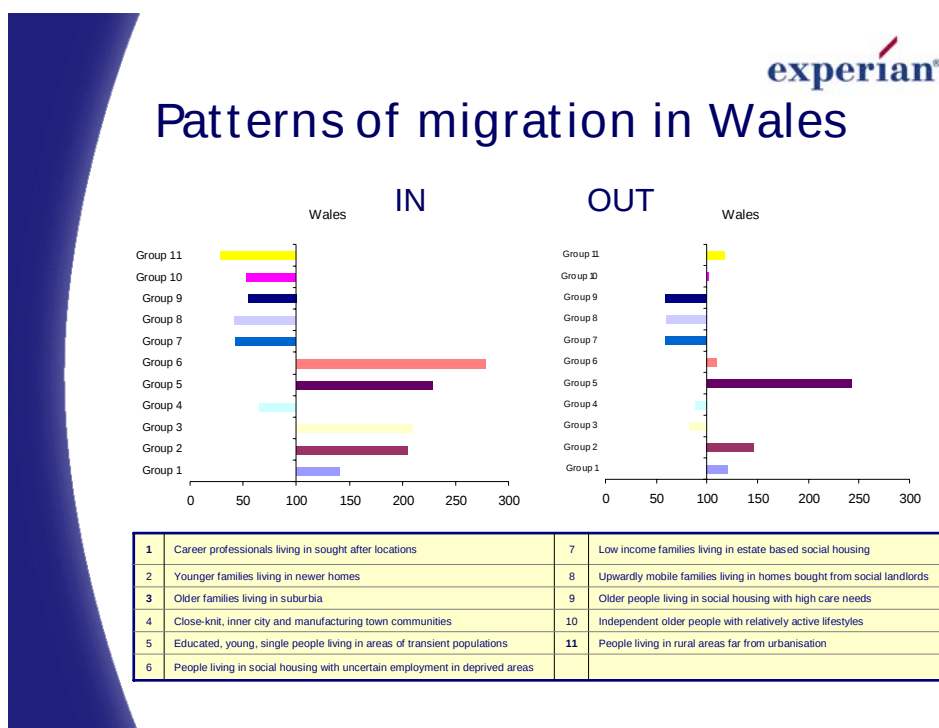


Figure: Patterns of migration in Wales – headline finding from previous Experian research

In response to these findings the Assembly has commissioned Experian to undertake research to improve understanding of this issue using official and non-official data, but making particular use of Experian’s Mosaic & Movers data. This report presents the findings of this work.

Section 1 provides an overview of the headline migration patterns in Wales;

Section 2 looks in more depth at migration flows between Wales and the rest of the UK;

Section 3 considers the patterns of migration within Wales; and

Section 4 draws together conclusions from the research.

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Executive Summary

HEADLINE MIGRATION TRENDS

Wales receives net inflows of migrants from elsewhere in the UK. In 2005/06 the net inflow of migrants was 6,100. The largest net inflows from England were apparent in Powys and Carmarthenshire (each gaining 1,000 people), whilst Cardiff witnessed the largest overall gross migration flows (inflows and outflows).

Wales gains larger net inflows of working age residents from England than pensionable age residents. Moreover, while the 2001 Census suggested Wales was losing more managers and professionals to England than it was gaining, more up-to-date Movers data suggests this trend appears to have reversed.

However, Wales does also receive disproportionate numbers of disadvantaged groups relative to its population, particularly young people from disadvantaged inner city locations and those moving from high density social housing.

In terms of net flows, Wales gains both advantaged and disadvantaged groups. The largest net inflow is of older families, whilst Wales also attracts managers, professionals and others employed in highly paid occupations.

INTER REGIONAL MIGRATION FLOWS

The greatest inflows of migrants from England are from the regions of South West, North West and West Midlands. One quarter of in-migrants from the South West move to Cardiff, whilst those from the North West tend to move to North Wales. Outward migration from Wales follows a similar pattern - those from North Wales tend to migrate to the North West, whilst there are large outflows from Cardiff, Swansea and Monmouthshire to South West England.

Evidence from the Census suggests that the Coastal South West of Wales and the Welsh Cities were subject to a net loss of higher socio-economic groups to London and the South East between 2000 and 2001. That said, there lacks evidence to assess whether these patterns still hold today, six years since the Census.

The most common English origins of disadvantaged groups are the North West and the West Midlands. Wales also receives large numbers of routine workers and those who have never worked from the South East of England. North Wales (particularly Flintshire, Conwy and Wrexham) and Pembrokeshire and Carmarthenshire are subject to net inflows of disadvantaged groups, particularly the most disadvantaged – those in routine occupations and those who have never worked.

MIGRATION PATTERNS WITHIN WALES

Whilst Cardiff experiences high levels of gross migration flows, the Capital has experienced a net outflow of migrants equal to 3,150 migrants between 2002 and 2005. These net outflows have raised suggestions of a 'city flight' pattern – workers moving away from urban centres to neighbouring suburban and rural locations. Between 2002 and 2005 both Cardiff and Swansea were indeed net exporters of migrants to their neighbouring districts.

1 Headline Migration Trends

KEY MESSAGES

- Wales receives net inflows of migrants from the rest of the UK. In 2005/06 the net inflow was just over 6,000.
- The largest gross migration flows between Wales and England are in Cardiff. In 2004/05 Cardiff gained 8,750 new residents but lost 8,090.
- Wales gains larger net inflows of working age residents from England than pensionable age residents. This suggests that migration with England may be helping to ease the natural aging of the population.
- The 2001 Census showed that Wales suffered from net outflows of managers and professionals to England. In contrast, Wales received net inflows of those in routine and semi-routine occupations, the long term unemployed and those who have never worked.
- Experian's *Movers* data provides more up-to-date migration statistics. This shows that Wales receives disproportionate numbers of young people from disadvantaged inner city locations and those moving from high density social housing.
- In contrast, Wales also appears to be disproportionately gaining numbers of 'career professionals living in sought after locations'. The largest proportion of inward migrants were 'older families living in suburbia', which accounted for 25 per cent of all inward migration flows to Wales.
- For *net* inflows, Wales gains both advantaged and disadvantaged groups. The largest net inflow is of older families, whilst Wales is also managing to attract managers, professionals and others employed in highly paid occupations. Wales also receives net inflows of those living in social housing with uncertain employment prospects.

1.1 WHAT IS THE SCALE OF MIGRATION FLOWS BETWEEN WALES AND THE REST OF THE UK?

In 2005/06 Wales received an inflow of 55,600 migrants from the rest of the UK.¹ With an outflow of 49,500, this meant that Wales received a net inflow of 6,100 migrants. Despite this positive balance, in-migration has been falling since 2003, whilst out-migration has remained relatively stable, leading to diminishing net inflows of migrants to Wales (Figure 1.1).

¹ National Health Service Central Register (NHSCR), 2006

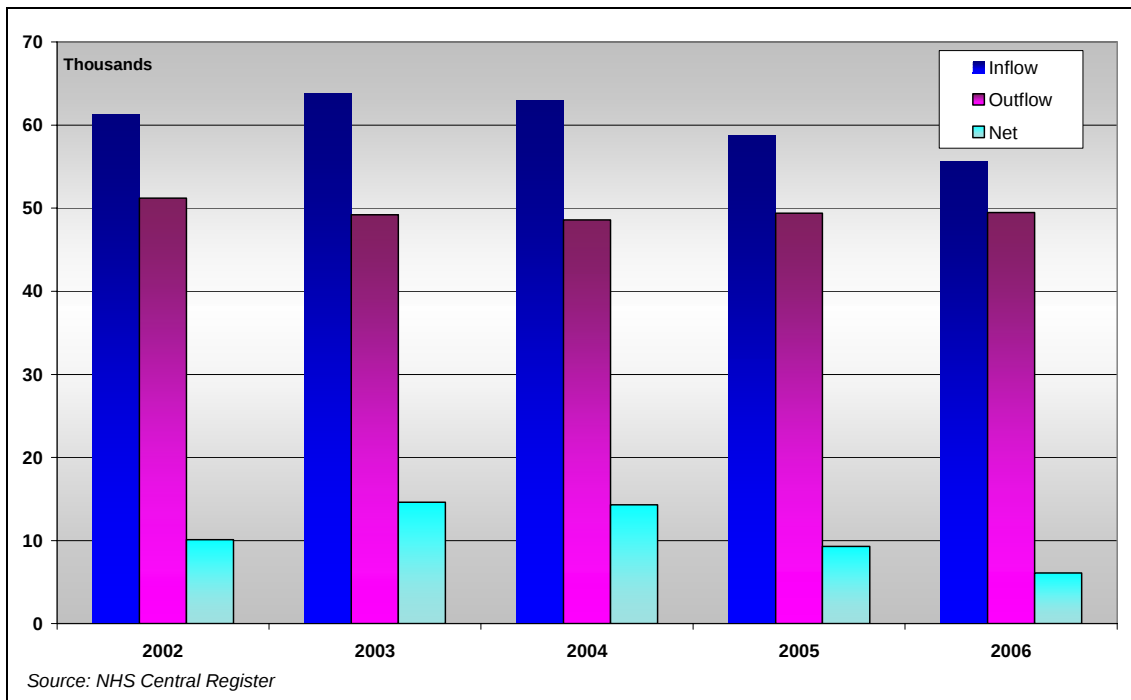


Figure 1.1 – Headline migration flows between Wales and the rest of the UK

Within Wales, every district gained a net inflow of migrants from England in 2004/05, with the exception of the Vale of Glamorgan.² The largest **net** inflows were to Powys and Carmarthenshire, which each gained around 1,000 extra residents through migration with England, whilst even in the Vale of Glamorgan net outflows were very modest (just 50 people).

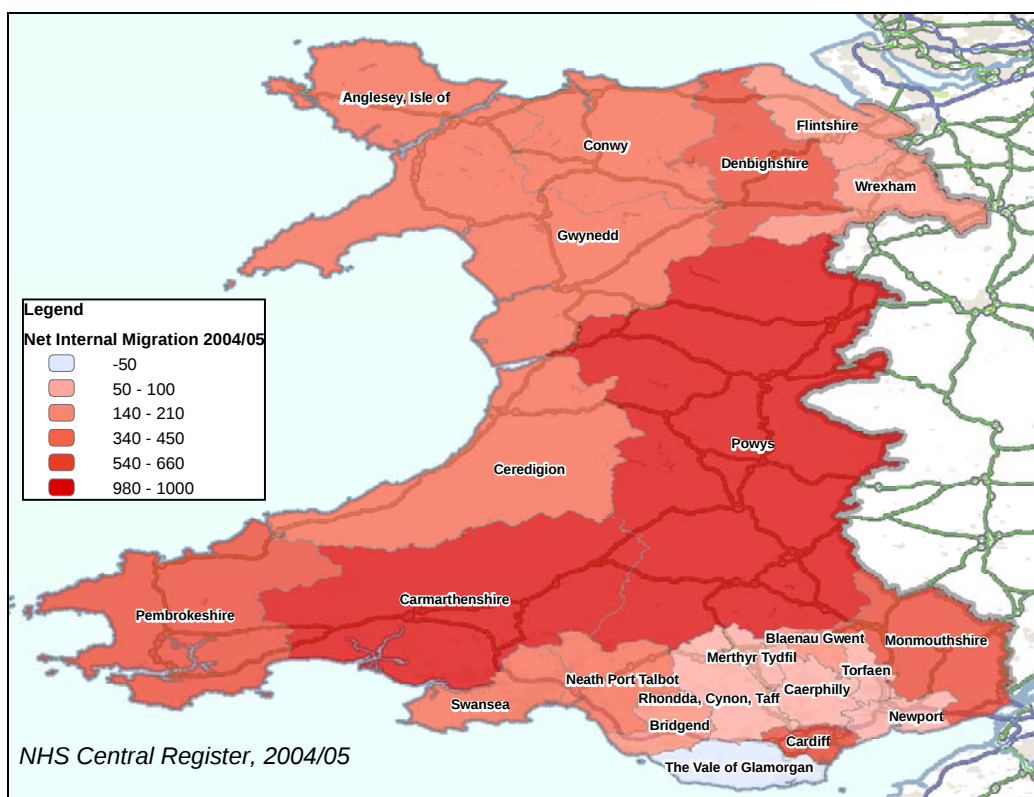


Figure 1.2 – Net Internal Migration flows between Welsh districts and England, 2004/05

² For migration patterns at a district level, NHSCR Origin-Destination data shows movements between Welsh districts and England.

Although the largest net gains (in terms of stock) were made in the districts of Powys and Carmarthenshire, the largest gross migration flows were in Cardiff. Indeed, Cardiff is subject to the greatest migration flows with England by some margin and in 2004/05 the Capital received 8,750 in-migrants from England, while 8,090 left the city for England.

Migration flows were also substantial between Swansea and England, with 4,200 in-migrants to Swansea from England, whilst 3,860 moved in the opposite direction. Conversely, migration flows between England and the Welsh Valleys, particularly the Heads of the Valleys (perhaps with the exception of Rhondda, Cynon, Taff), is much more limited.

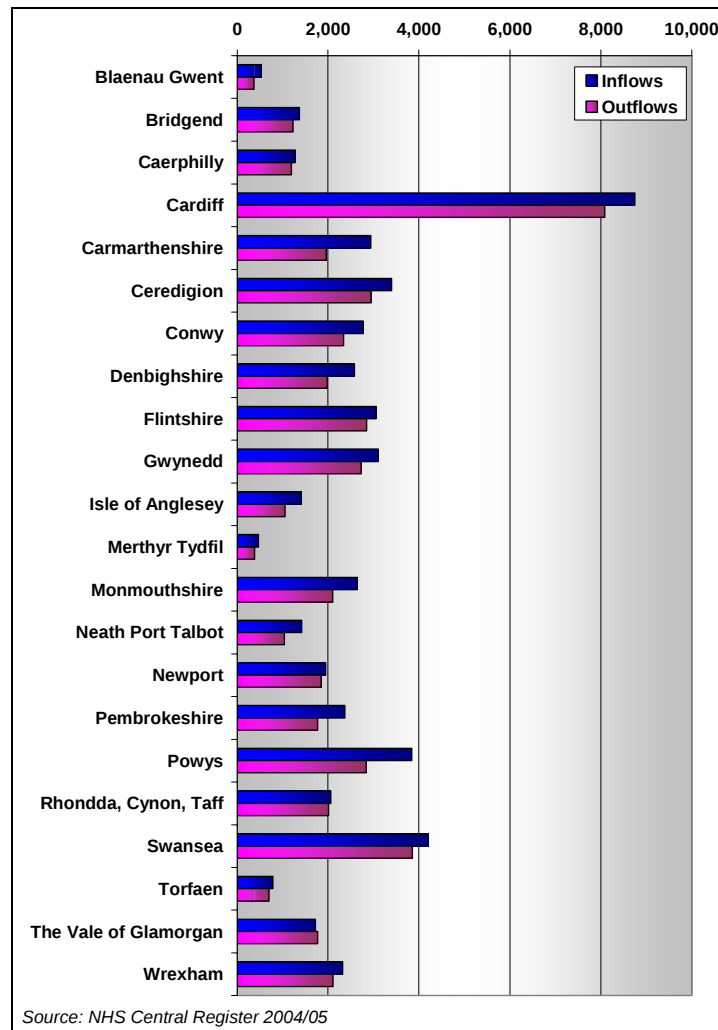


Figure 1.3 – Gross internal migration flows between Welsh districts and England, 2004/05

1.2 WHAT SOCIO-DEMOGRAPHIC GROUPS DOES WALES GAIN FROM, AND LOSE TO, ELSEWHERE IN THE UK³?

1.2.1 Demographics

Between 2004 and 2005, the largest movements between Wales and England are of those aged between 16 and 44, with gross migration flows highest amongst the 20 to 24 age group, and

³ While headline analysis is conducted at the UK level, more detailed analysis generally only refers to the English regions, owing to the small migration flows between Wales and Scotland/Northern Ireland.

then diminishing within each 5 year age cohort thereafter, highlighting the transitory nature of the student population (Figure 1.4).

Given the significant net in-migration to Wales from elsewhere in the UK, it is unsurprising that Wales witnesses a net inflow of most age groups. Wales gained a greater number of working age people from England, than it did of pensionable age people – net inflows of 4,700 and 900 respectively.

That said, Wales loses more people aged between 20 and 29 to England than it gains, to the magnitude of 1,100 in 2004/05. It is, however, important to note that internal migration patterns are often heavily influenced by student flows, particularly in areas with significant university presence. Indeed, the net outflows of those aged between 20 and 24 may to some extent reflect students, who moved to Wales from England to attend university, returning home after completing their studies. However, due to a lack of longitudinal data on the nature of migration, it is difficult to ascertain the migratory patterns over the lifetime of any given individual.

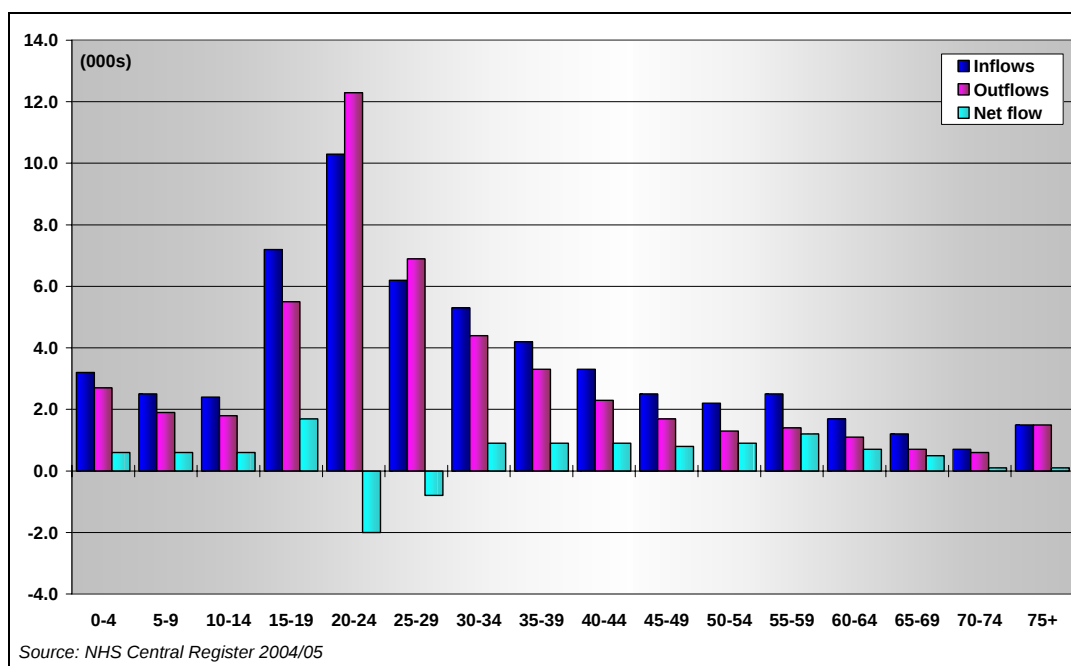


Figure 1.4 – Age profile of migrants between Wales and England, 2004/05

Moreover, the net loss of those aged between 15 and 29 is not a phenomenon unique to Wales, rather many other regions experience this trend and often to a greater degree. Indeed, only London and Yorkshire and the Humber witness sizeable net-inflows of those aged between 15 and 29 (Figure 1.5).⁴ Moreover, even regions such as the South East that have experienced rapid expansion of their economies are losing young people to London.

⁴ The movement of specific age groups between regions is, at the UK level, largely a zero sum game, with one region's loss of people of any particular age cohort being another region's gain. Figures may not, however, aggregate to zero due to rounding. It is important to note, however, that demographic change in any given area will be influenced by migration (both internal and international) and natural change (births and deaths).

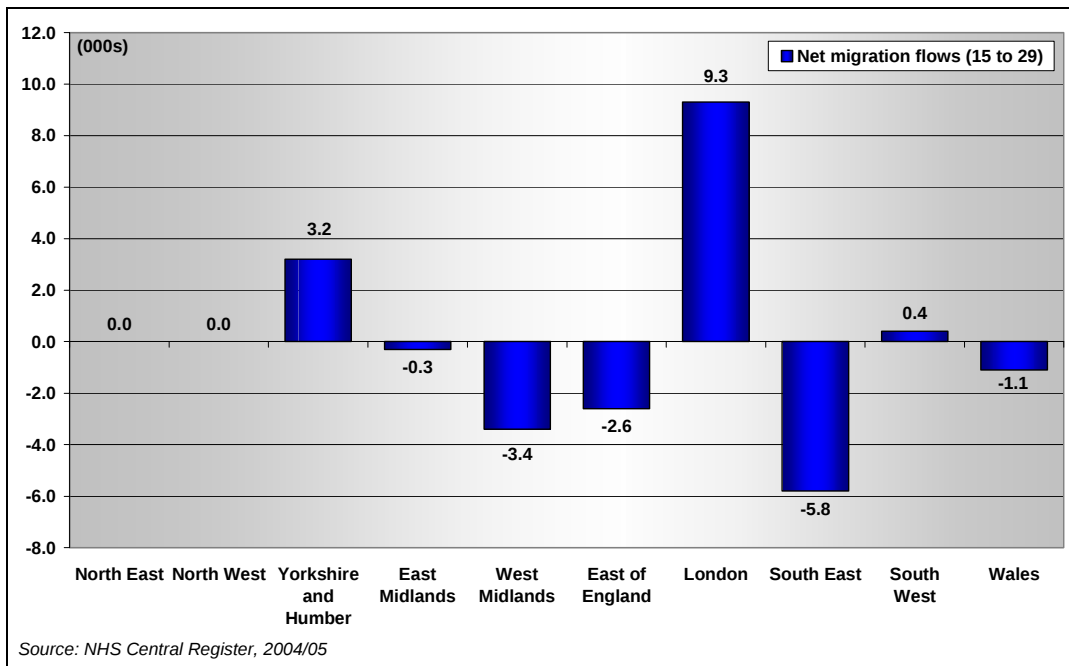


Figure 1.5 – Net migration flows of those aged 15 to 29 years, Wales vs English regions⁵

1.2.2 Socio-Economic Groups

Turning to the socio-economic characteristics of migrants, evidence from the 2001 Census suggests distinct patterns of net in-migration to Wales, as illustrated by Figure 1.6. Evidence from this dataset suggests that in the year leading up to the Census Wales witnessed a significant **net** out-migration of the highest socio-economic groups, a significant net in-migration of the ‘middling’ socio-economic groups and a slight net-inflow of those lower socio-economic groups.

Indeed, in the year leading up to the Census Wales experienced a net loss of managers and professionals to England (of nearly 1,400 people), as well as a net loss of those working in Intermediate occupations (of just over 500 people).

In contrast, Wales experienced significant net inflows of small employers and lower supervisory and technical workers, as well as those employed within routine and semi-routine roles and the long term unemployed or people who have never worked.

⁵ It is important to note that the NHS Central Register tends to be better at capturing migration patterns of some socio-demographic groups than others. Propensity to register with a doctor tends to be lower amongst young people and males and thus these groups are likely to be under-represented in migration figures from this data source.

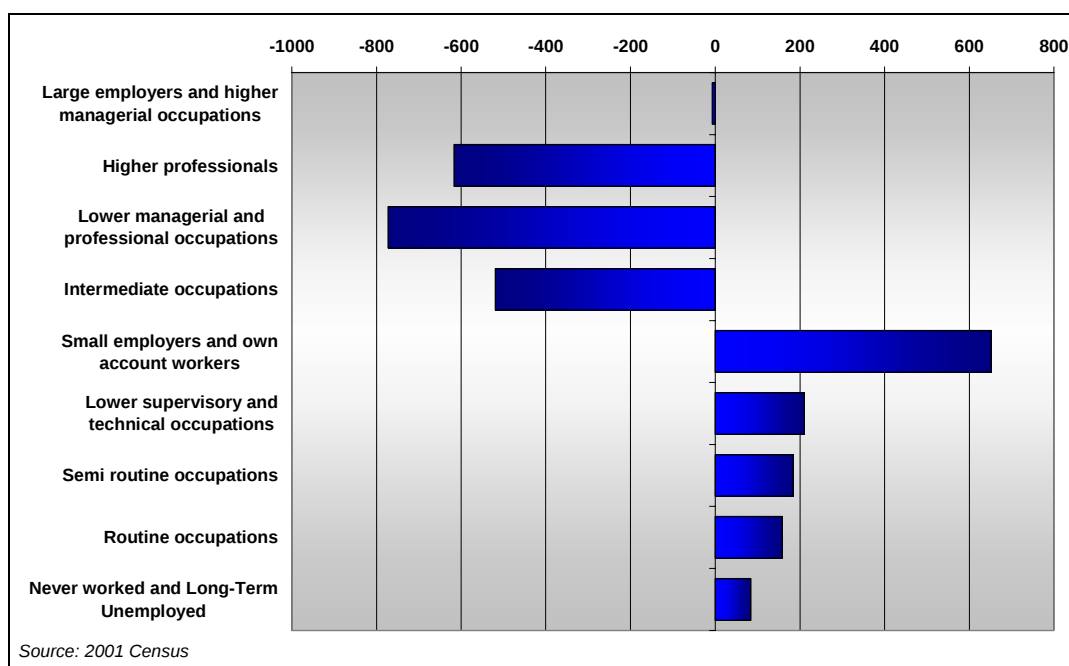


Figure 1.6 – Net migration flows between Wales and England by NS-Sec⁶, 2001

However, patterns of migration between Wales and England may have changed substantially over the past 6 years since the Census. Experian's Movers data provides additional contextual definition and more up-to-date information by considering the Mosaic profile of migration flows between Wales and the rest of the UK based on the type of area **from** which individuals are moving.

Evidence from Experian's Movers data suggests that the pattern of migration amongst socio-economic groups appears to have changed significantly over the past six years, although the lack of time series data prevents us from assessing the extent to which these trends are cyclical.

In-migration

In 2005, the proportion of in-migrants to Wales that are categorised as 'people living in social housing with uncertain employment in deprived areas' (group 6), was greater than the overall proportion of these groups currently living in Wales (Figure 1.7a and 1.7b). Within this group, Wales received disproportionate numbers of young people from disadvantaged inner city locations and those moving from high density social housing. *Please refer to Appendix 1 for a full definition of the Mosaic Groups and Types referred to in this report. People are categorised by the postcode from which they are moving (i.e. their origin postcode).*

⁶ The National Statistics Socio-Economic Classification (NS-SEC) is based on the occupation of an individual (coded to 4 digit SOC2000) and details of their employment status (whether an employer, self-employed or employee; whether a supervisor; number of employees at the workplace).

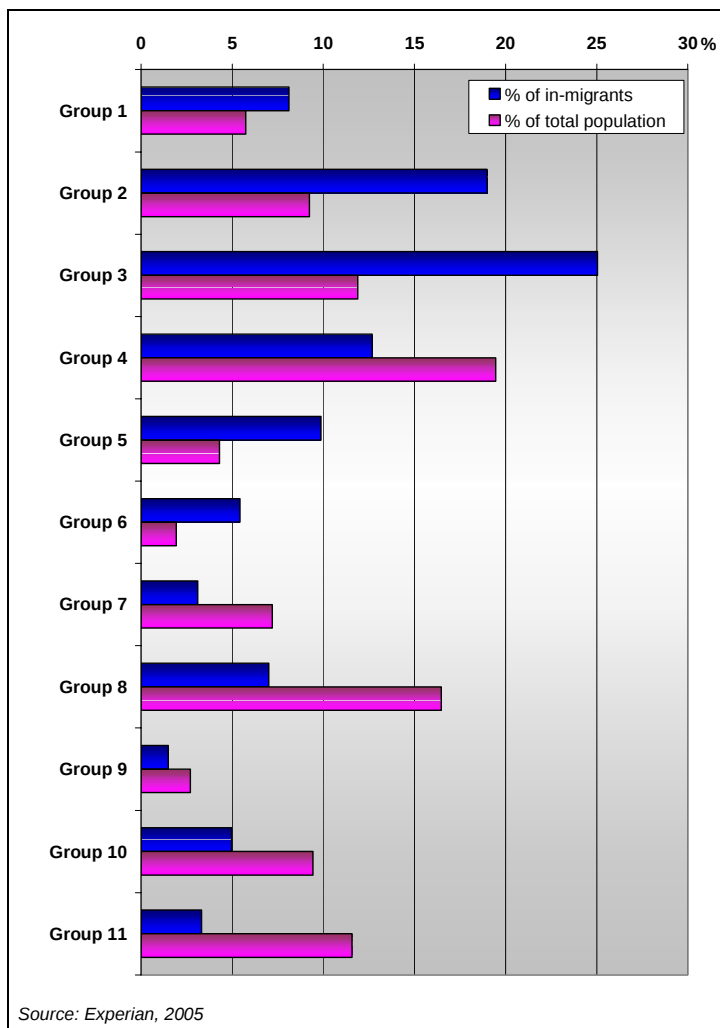


Figure 1.7a – Mosaic profile of Movers into Wales from elsewhere in the UK, 2005

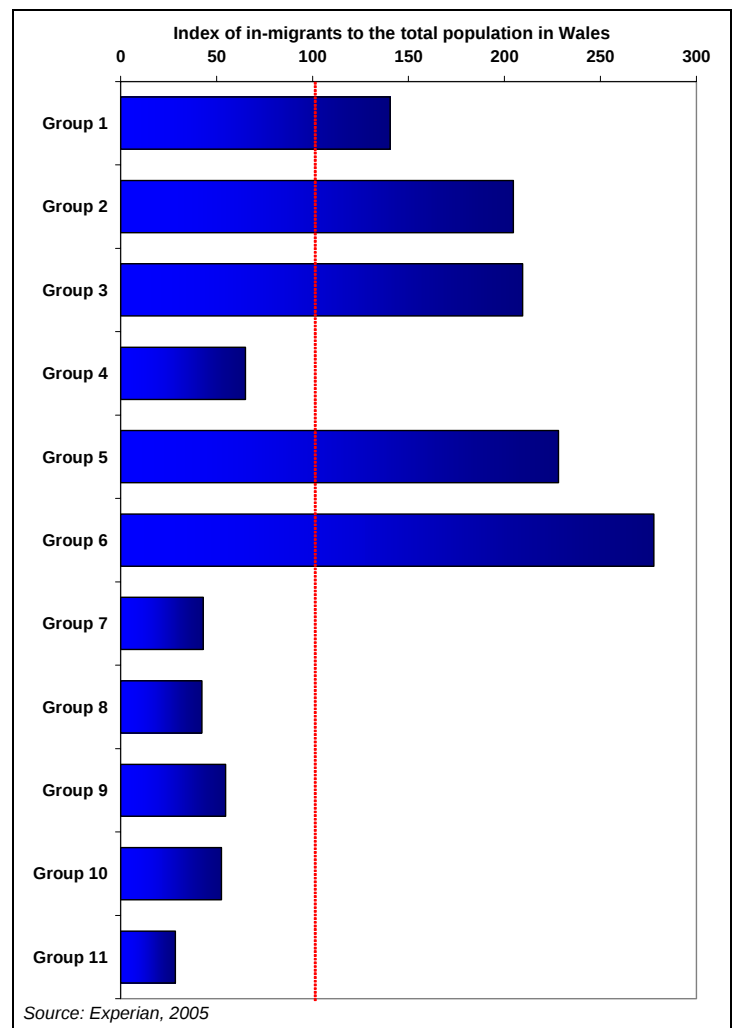


Figure 1.7b – Mosaic profile of Movers into Wales from elsewhere in the UK, 2005

1 Career professionals living in sought after locations	7 Low income families living in estate based social housing
2 Younger families living in newer homes	8 Upwardly mobile families living in homes bought from social landlords
3 Older families living in suburbia	9 Older people living in social housing with high care needs
4 Close-knit, inner city and manufacturing town communities	10 Independent older people with relatively active lifestyles
5 Educated, young, single people living in areas of transient populations	11 People living in rural areas far from urbanisation
6 People living in social housing with uncertain employment in deprived areas	

Moreover, while the proportion of in-migrants to Wales that fall within Mosaic group 6 is broadly in line with other parts of the UK, these socio economic groups are heavily over-represented in migration flows into Wales relative to the resident population of this group in Wales and much more so than in many other UK regions (Figure 1.8).

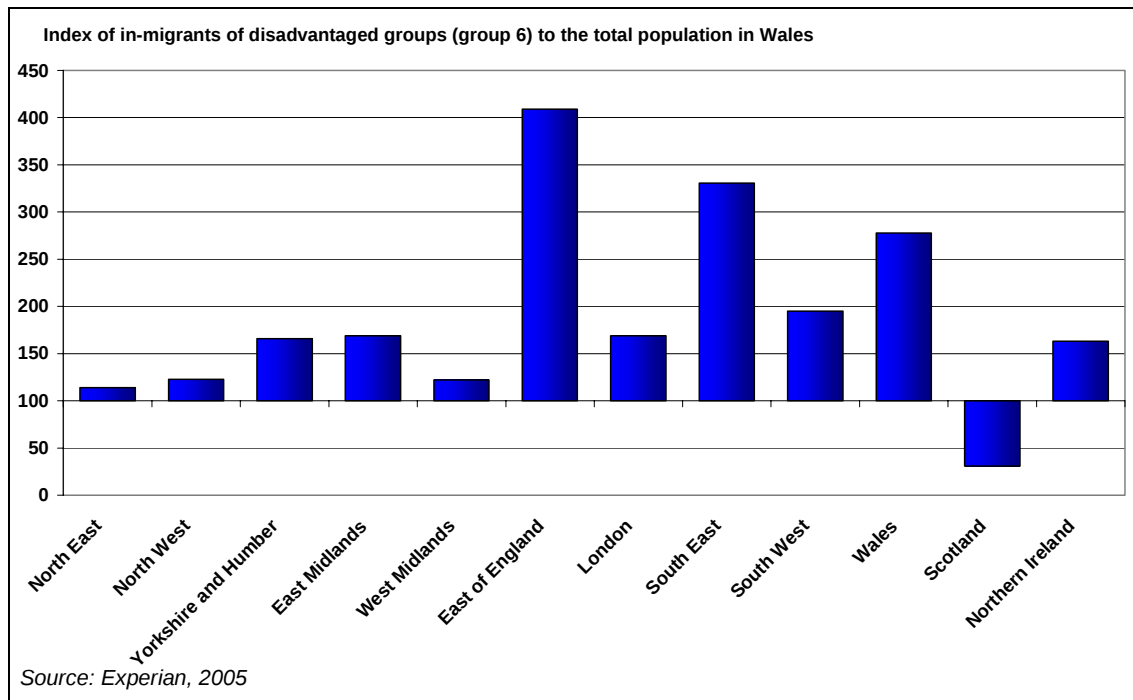


Figure 1.8 – Index of disadvantaged in-migrants to the total population of the region

In contrast to the picture portrayed by the 2001 Census however, evidence from the Movers data suggests that in 2005, Wales attracted significant numbers of higher socio-economic groups – Mosaic groups 1, 2 and 3 (Figure 1.7a and 1.7b).

The largest proportion of inward migrants was from Group 3, ‘older families living in suburbia’, which accounted for 25 per cent of all inward migration flows to Wales. Wales also appears to be disproportionately gaining migrants from Group 1, ‘career professionals living in sought after locations’. Eight per cent of inward migrants fell into this group in 2005, compared to just 5.7 per cent of the population. Within this group, highly educated professionals and well-paid executives are particularly over-represented, suggesting that Wales is increasingly able to attract well paid and well qualified executives.

Out-migration

Although Wales appears to be gaining disproportionate numbers of those in Groups 1 and 2, it is also losing large numbers from these categories, as highlighted by Figure 1.9, illustrating the tendency for higher mobility amongst higher socio-economic groups. Wales is losing a disproportionately large number of those in Group 5, which largely reflects the transient nature of student populations (Wales is also gaining large numbers of those in Group 5).

Compared to inward migration flows it is noticeable that a much larger proportion of outward migrants are from Group 11, ‘people living in rural areas far from urbanisation’. 13.8 per cent of outward migrants were from this group, compared to just 3.3 per cent of inward migrants and 12 per cent of the population.

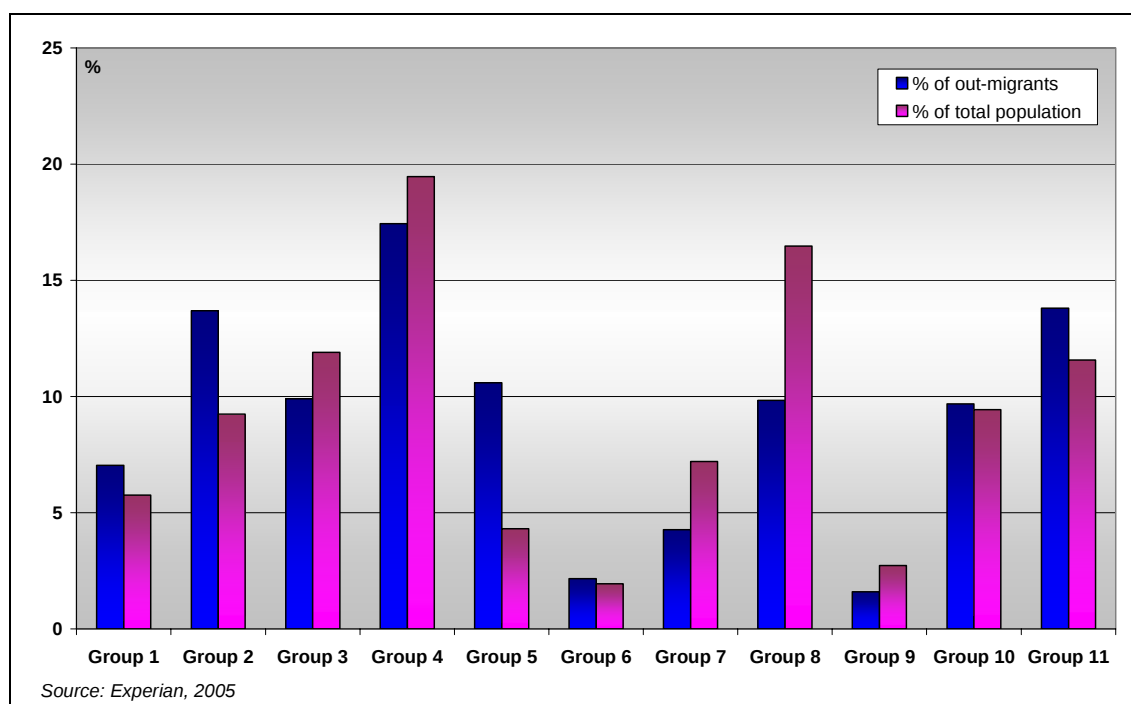


Figure 1.9 – Mosaic profile of migrants leaving Wales, 2005

1	Career professionals living in sought after locations	7	Low income families living in estate based social housing
2	Younger families living in newer homes	8	Upwardly mobile families living in homes bought from social landlords
3	Older families living in suburbia	9	Older people living in social housing with high care needs
4	Close-knit, inner city and manufacturing town communities	10	Independent older people with relatively active lifestyles
5	Educated, young, single people living in areas of transient populations	11	People living in rural areas far from urbanisation
6	People living in social housing with uncertain employment in deprived areas		

Net migration

Figure 1.10 illustrates estimates of net-migration flows, based on Experian's Movers data and gross flow figures from the NHSCR.⁷ These estimates suggest that Wales is subject to a net inflow of both advantaged and disadvantaged groups.

The largest net inflow is from older families (Group 3), although Wales also gains more individuals from Groups 1 and 2 than it loses to elsewhere in the UK. Whilst this suggests that Wales is managing to attract managers, professionals and others employed in highly paid occupations, Figure 1.9 also shows that Wales is receiving net inflows of those living in social housing with uncertain employment prospects (Group 6).

⁷ Due to data protection restrictions we are unable to present absolute numbers of movers. Rather, Figure 1.9 considers proportionate values (i.e. the proportion of in and out migrants that are of particular Mosaic group or type) and the NHSCR gross flows data to estimate absolute numbers of movers in each Mosaic group.

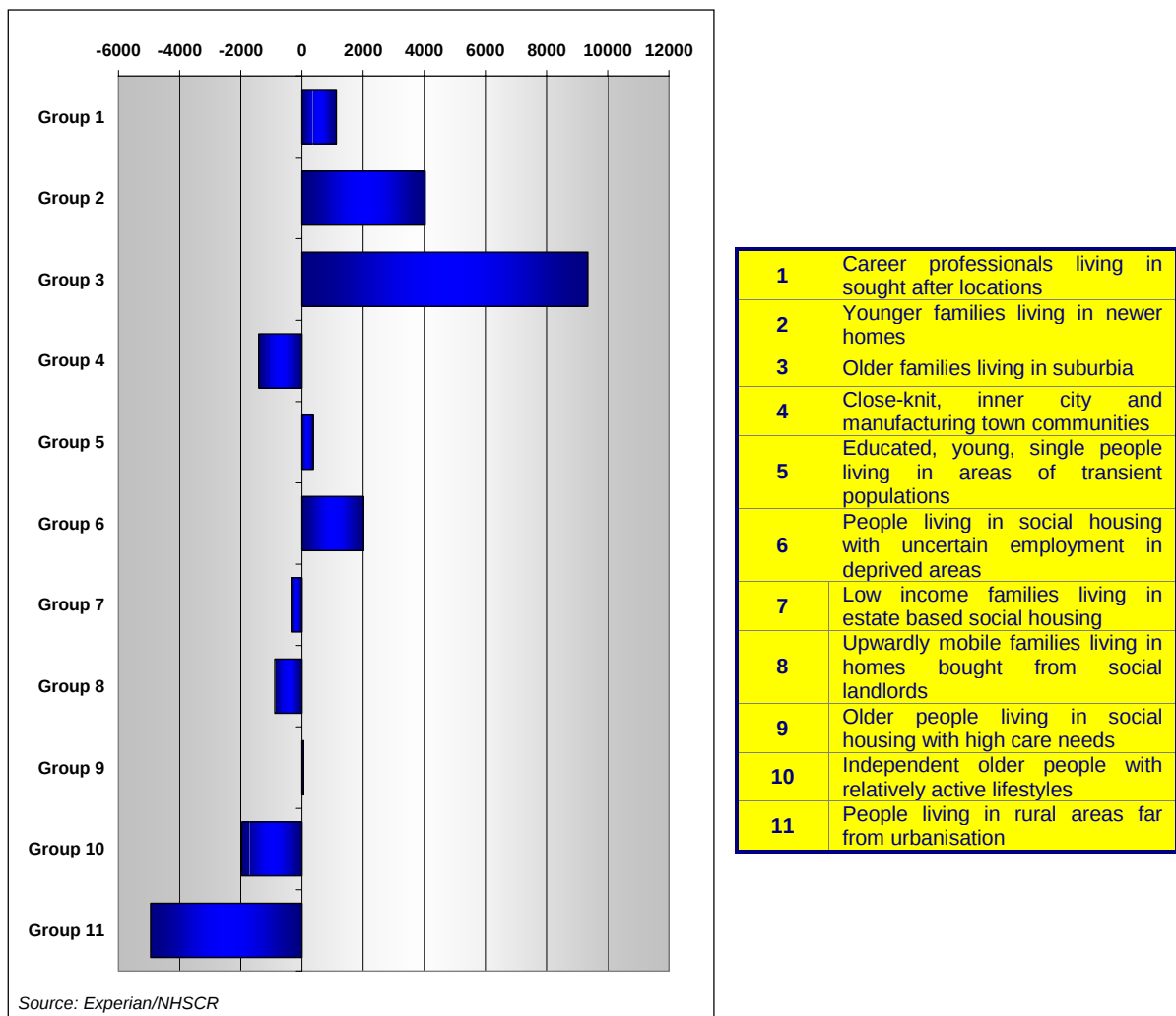


Figure 1.10 – Net migration flows between Wales and England, by Mosaic Group⁸, 2005

⁸ The National Statistics Socio-Economic Classification (NS-SEC) is based on the occupation of an individual (coded to 4 digit SOC2000) and details of their employment status (whether an employer, self-employed or employee; whether a supervisor; number of employees at the workplace).

2 Inter Regional Migration Flows

KEY MESSAGES

- The greatest inflows from England are from the regions of South West, North West and West Midlands. A quarter of inward migrants from the South West move to Cardiff, whilst those from the North West tend to move to North Wales.
- Outward migration flows to England tend to mirror inward flows. Those from North Wales tend to migrate to the North West, whilst there are large outflows from Cardiff, Swansea and Monmouthshire to the South West.
- Wales generally experiences a net inflow from all of the English regions, the most substantial being from the South West, West Midlands and North West.
- Evidence from the Census suggests that the Coastal South West of Wales and the Welsh Cities were subject to a net loss of higher socio-economic groups to London and the South East between 2000 and 2001. That said, there lacks evidence to assess whether these patterns still hold today, six years since the Census.
- The most common English origins of disadvantaged groups are the North West and the West Midlands. Wales also receives large numbers of routine workers and those who have never worked from the South East of England.
- North Wales (particularly Flintshire, Conwy and Wrexham) and Pembrokeshire and Carmarthenshire are subject to net inflows of disadvantaged groups, particularly the most disadvantaged – those in routine occupations and those who have never worked.

2.1 WHAT PATTERNS OF MIGRATION EXIST BETWEEN WALES AND THE ENGLISH REGIONS?

In-migration

As illustrated by Figure 2.1, Wales receives the highest number of in-migrants from those regions that are geographically closest. In 2005/06, Wales received an inflow of over 10,000 people from the South West, a further 9,600 from the North West and just over 9,000 from the West Midlands.

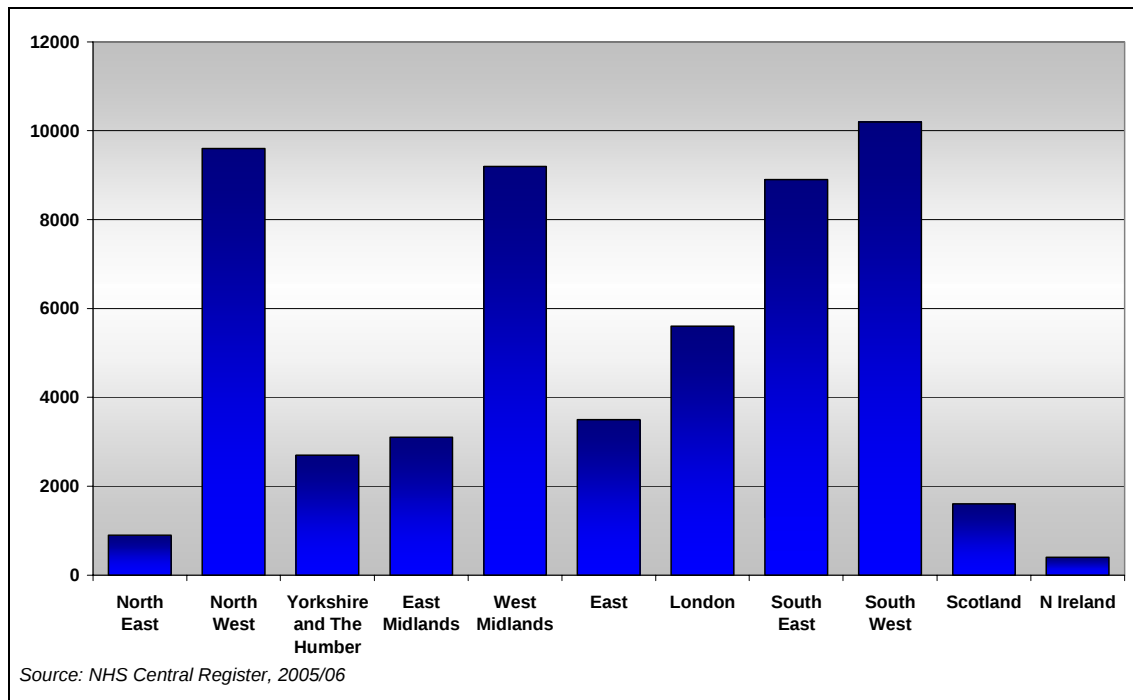


Figure 2.1 – Origin of migrants to Wales, 2005/06

The districts of North Wales – Flintshire, Denbighshire, Conway, Wrexham, Gwynedd and the Isle of Anglesey – receive significant inflows of people from the North West (Figure 2.2).

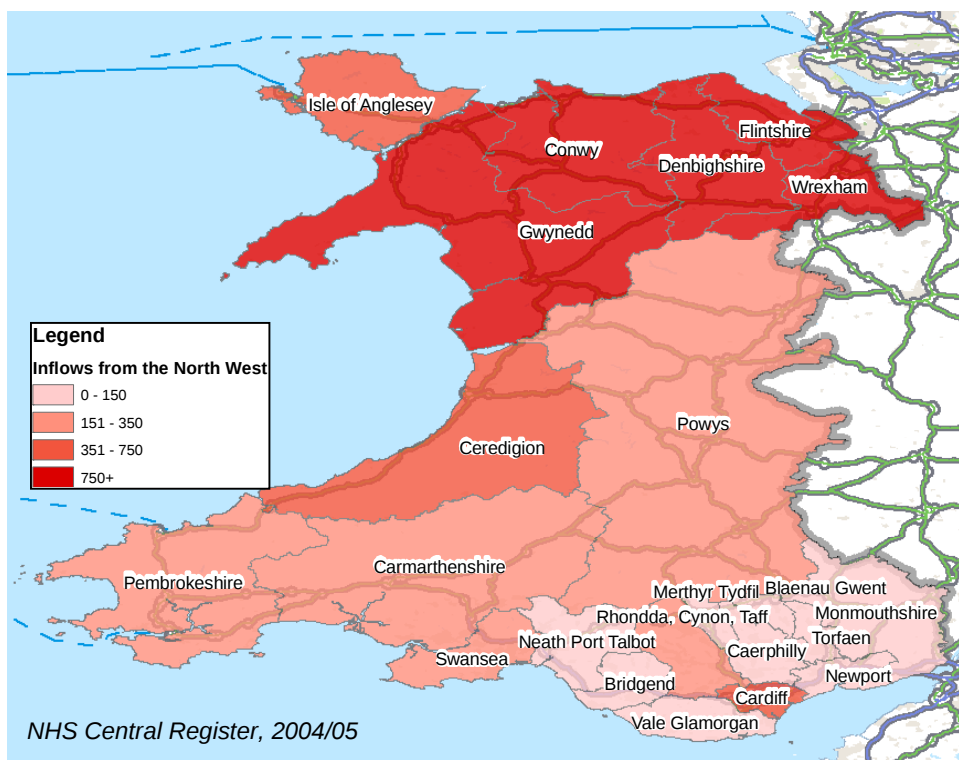


Figure 2.2 – Inflows to the Welsh districts from the North West

The pattern of inflows from the South West, however, is more mixed and it is Cardiff that attracts the highest numbers of in-migrants from the South West, accounting for 25 per cent of inflows to Wales from this region. Significant numbers of people move from the South West to neighbouring Monmouthshire (just under 1,000), but Swansea also attracts a similar number of in-migrants from the region (Figure 2.3).

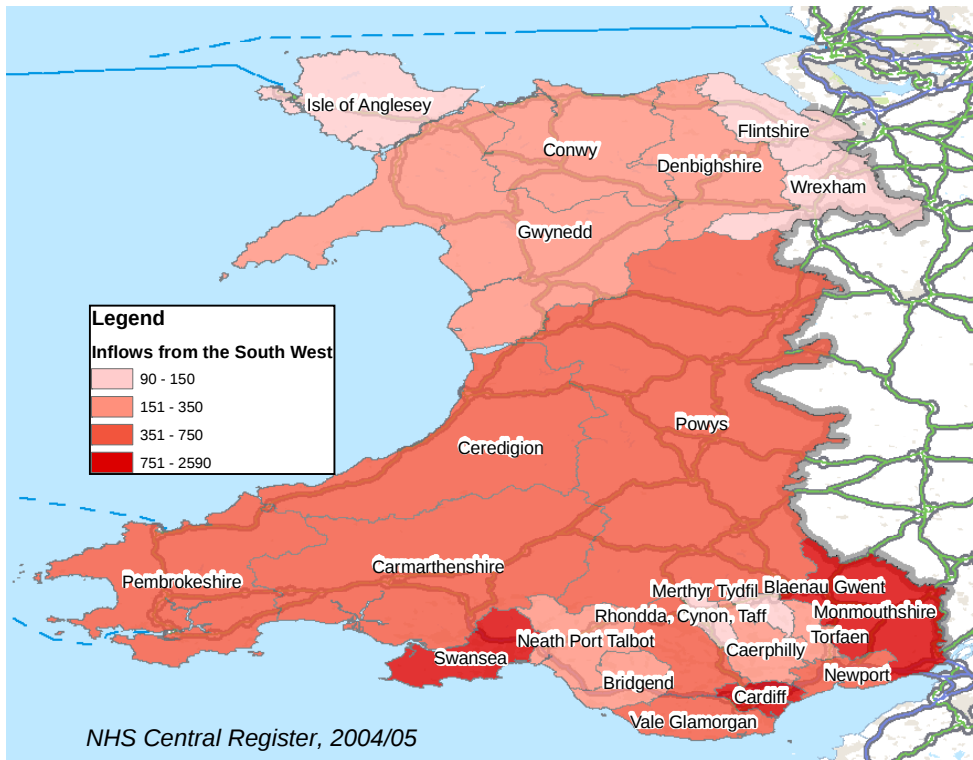


Figure 2.3 – Inflows to the Welsh districts from the South West

Similarly, inflows to Wales from the West Midlands are generally more dispersed. While significant numbers move to neighbouring Powys, large numbers of in-migrants from the West Midlands relocate to Cardiff and coastal parts such as Ceredigion and Gwynedd (Figure 2.4).

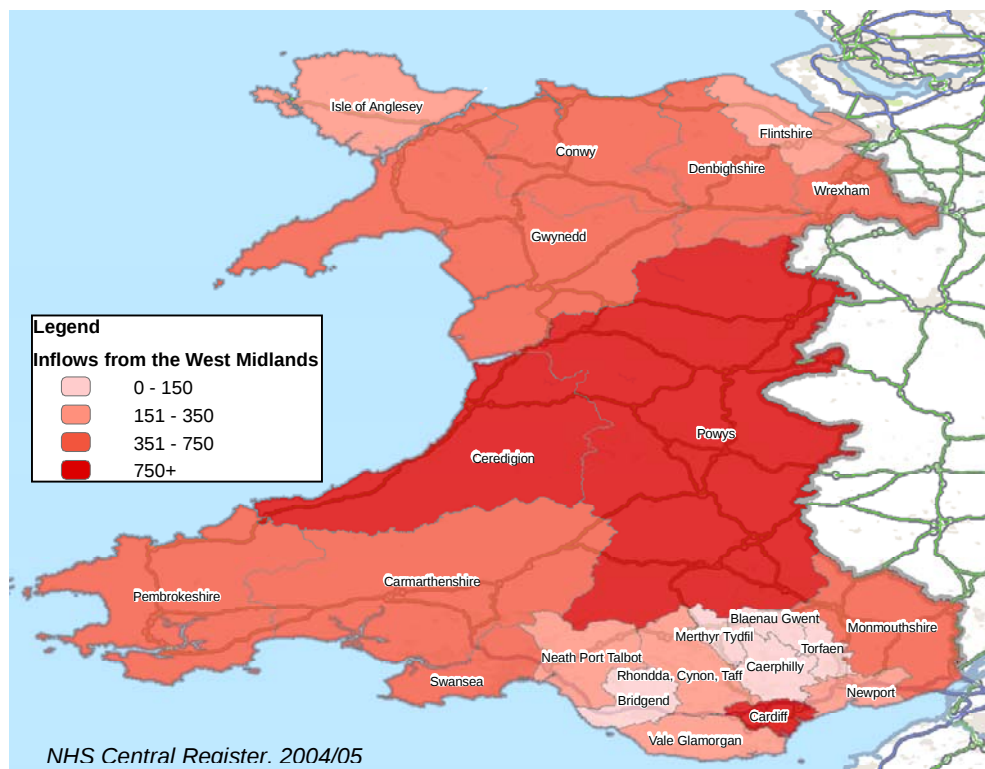


Figure 2.4 – Inflows to Welsh districts from the West Midlands

Wales also receives significant numbers of in-migrants from London and the South East (8,900 and 5,600 respectively). A substantial proportion of these in-migrants move to Wales' largest cities, as well as to coastal parts of South West and Mid Wales (Carmarthenshire, Ceredigion and Pembrokeshire). Indeed, inflows from London and the South East account for one third of all inflows to the coastal South West districts from outside of Wales.

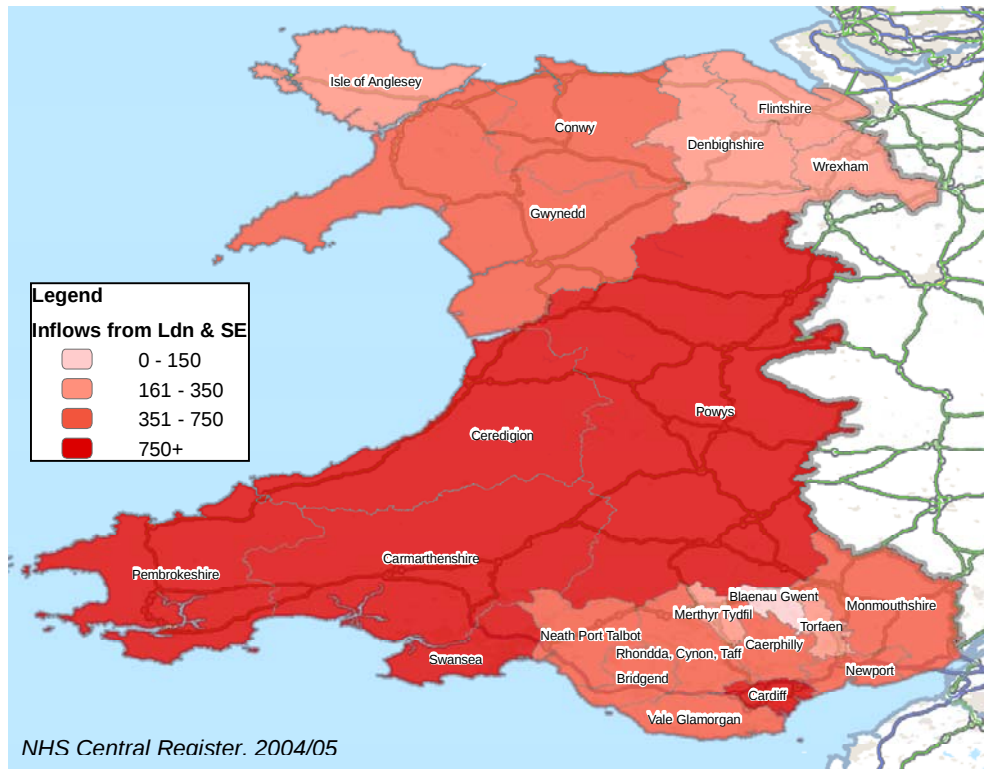


Figure 2.5 – Inflows to Welsh districts from London and the South East

Out-migration

The regions from which Wales gains the greatest numbers of in-migrants are generally those regions that Wales also loses the greatest number of people to (Figure 2.6).

In 2005/06, nearly 10,000 people left Wales for the South West of England and as for inflows, these tend to be people leaving Cardiff, Swansea and Monmouthshire. Similarly, out migrants to the North West tend to be those previously resident in North Wales.

In contrast, while significant numbers of those living in Wales' largest cities do move to London and the South East, this is not the case for the South West Wales coastal districts, which lose few residents to these English regions, despite receiving significant inflows.

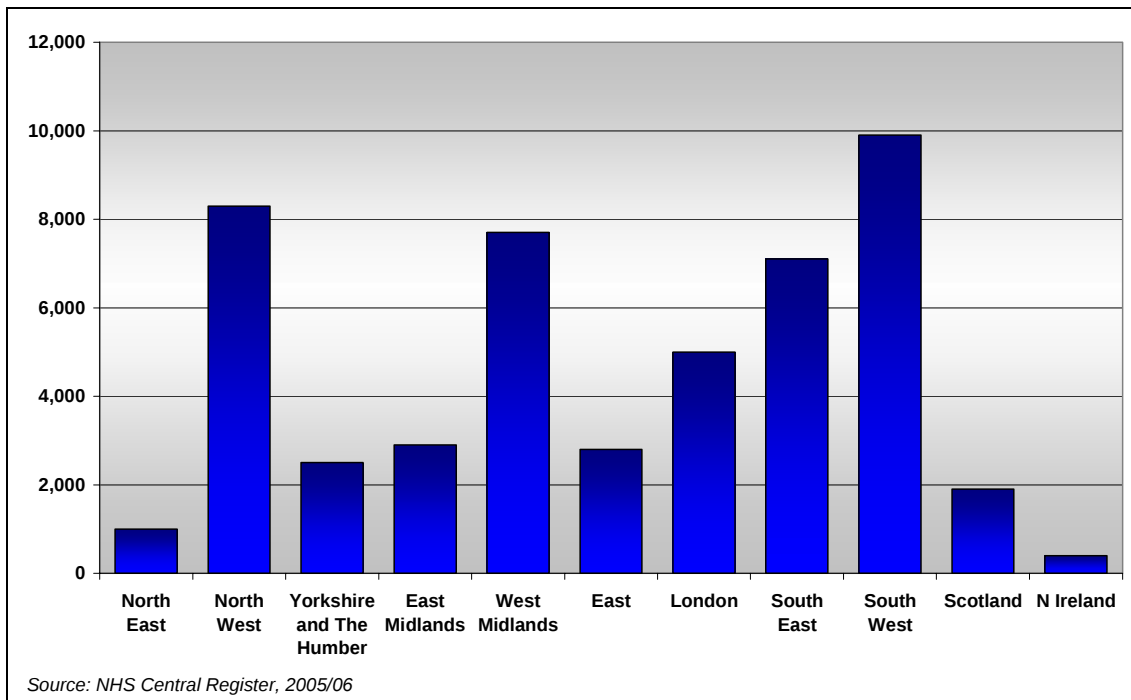


Figure 2.6 – Destination of migrants from Wales, 2005/06

Net-migration

The net effect of these inflows and outflows is that Wales generally experiences a net inflow from all of the English regions, the most substantial being from the South East, West Midlands and North West.

Indeed, in 2005/06 Wales received a net inflow of 1,800 migrants from the South East, although this marks a slight decline in the net inflow seen over the past five years caused by a reduction in inflows to Wales from the South East, rather than an increase in outflows from Wales to the region (Figure 2.7).⁹

⁹ National Health Service Central Register (NHSCR)

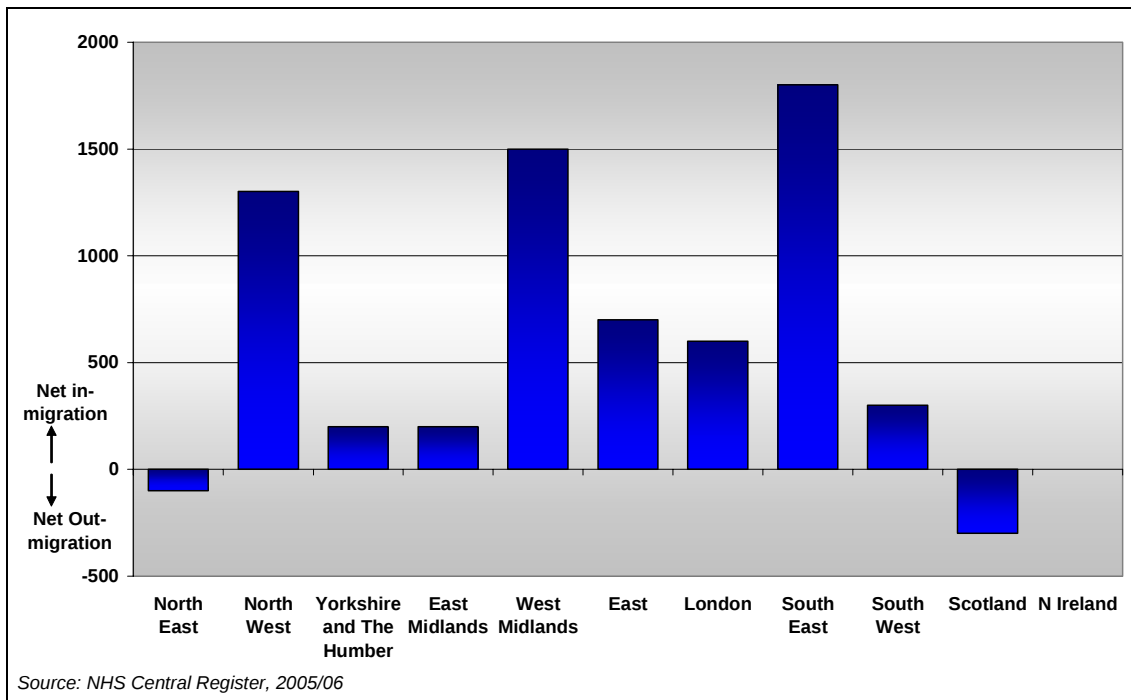


Figure 2.7 – Net migration patterns between Wales and the rest of the UK, 2005/06

2.2 WHAT ARE THE SOCIO-DEMOGRAPHIC CHARACTERISTICS OF MIGRANTS ENGAGED IN THESE INTER-REGIONAL MOVEMENTS?

2.2.1 Flows between North Wales and the North West of England

Demographics

As highlighted in Section 2.1, there are strong migration patterns between North Wales and the North West of England. According to the NHS Central Register, the most common age group amongst these flows is the 25 to 44 age cohort. As Figure 2.8 illustrates, this has been consistently the case in the period from 1999 to 2005. The next most prominent age groups are the 45 to 64 group and the 16 to 24 year old group (the latter only so for the past two years).

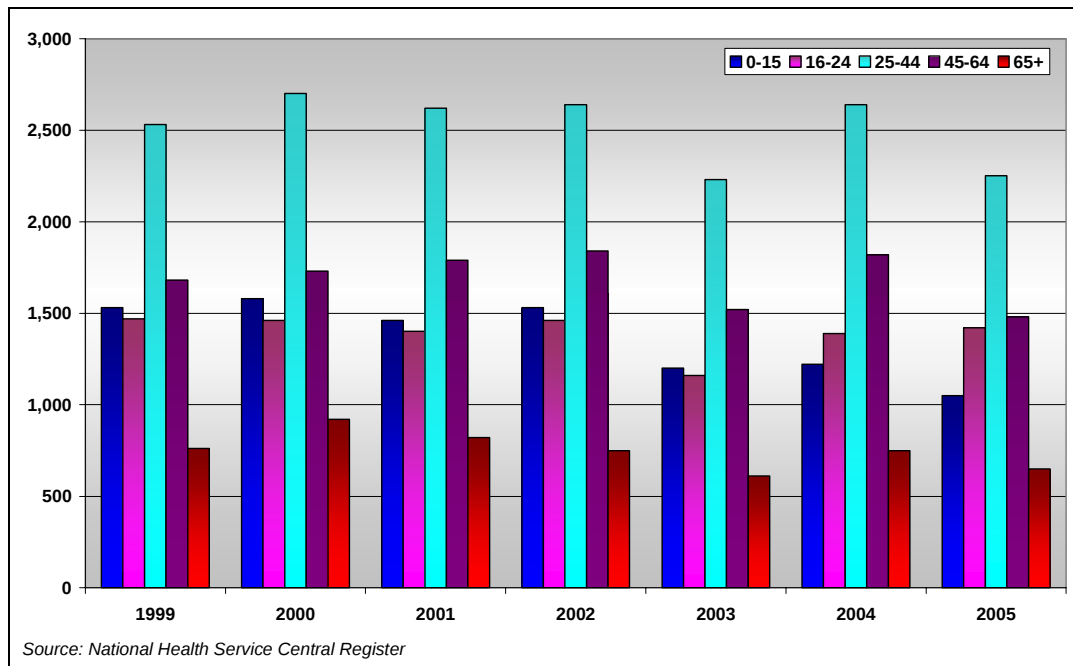


Figure 2.8 – Age profile of movers from North West to North Wales 1999 to 2005

The general age profile shown above for the whole of North Wales (defined as the districts of North East Wales and North West Wales collectively) varies between the Local Authority areas. Conwy and the Isle of Anglesey are notable for attracting an older age profile, with the 45 to 64 age group being the single largest group in the migrant flow from the North West in 2005.

In contrast, Gwynedd has a much more youthful age bias, with the 16 to 24 age group being the single largest in the migrant flow. Flintshire and Wrexham both have a slightly more youthful profile than the average for North Wales, whilst the profile in Denbighshire is similar to the average.

Figure 2.9 shows the age group balance between in-migrants to North Wales from the North West and out migrants flowing in the opposite direction. This shows that in numerical terms, there is a net outflow of people across nearly all age groups. This is in contrast to the net-inflows of people from the North West to Wales as a whole. This pattern is most defined in the key working age bands (25-44 and 45-64). The inflow and outflow of 16-24 year olds between North Wales and the North West is roughly in balance.

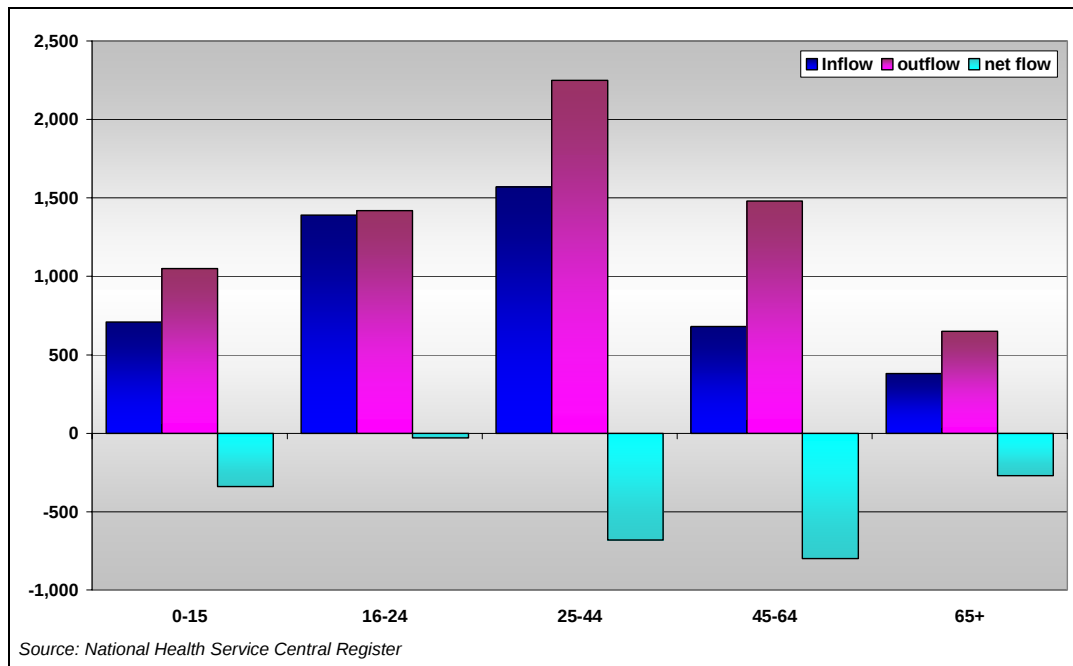


Figure 2.9 – In, out and net flows by age between North West and North Wales, 2005¹⁰

Socio-economic groups

Experian's Movers data (Figure 2.10) suggests that the largest in-moving Groups from North West to Wales were close-knit inner city-dwellers, older families and younger families. This is a little different from the existing Welsh adult population which is quite heavily characterised by close-knit inner cities and upwardly mobile families (right to buy owners).

Rather educated, young single people (often students or graduates) and people living in social housing with uncertain employment in deprived areas are also over-represented amongst in-migrants to North Wales relative to the population.

¹⁰ This chart presents inflows to North Wales from the North West of England, Outflows from North Wales to the North West of England and the net flows between North Wales and the North West.

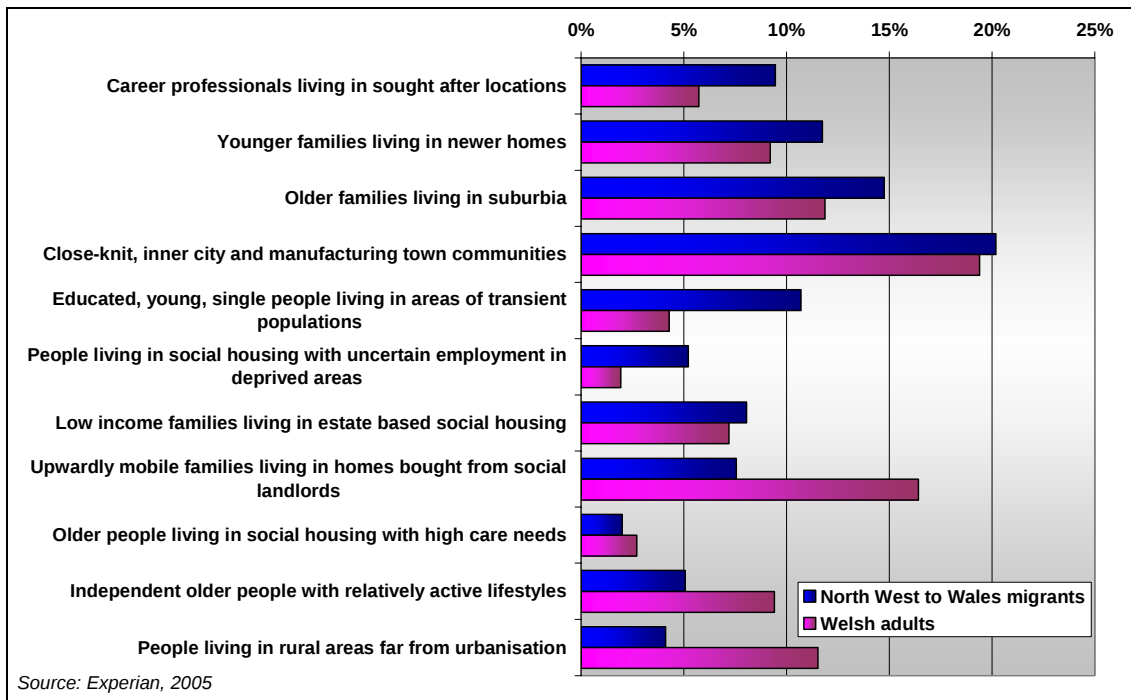


Figure 2.10 – Profile of in-migrants to Wales from North West versus Wales profile, 2005

The 2001 Census can be used to gain some insight into the socio-economic profile of migrants moving between the North West to North Wales in the year to 2001 (Figure 2.11). Of the 3,710 people involved in this migrant flow in the year to April 2001, over one in five (21 per cent) were classed as being in lower managerial occupations. A further 18 per cent were in routine or semi-routine occupations.

These patterns are largely mirrored when considering the socio-economic characteristics of those moving from North Wales to the North West, although (in contrast to the more up-to-date NHSCR data) the Census recorded that North Wales was subject to a **net** inflow of 900 migrants from the region between 2000 and 2001. It is important to note however that caution should be exercised when using Census information to analysis the socioeconomic profile of more recent movers.

According to the Census, North Wales gained net inflows of migrants from all socio-demographic groups with the exception of full-time students, where North Wales loses more of these individuals to the North West than it gains.

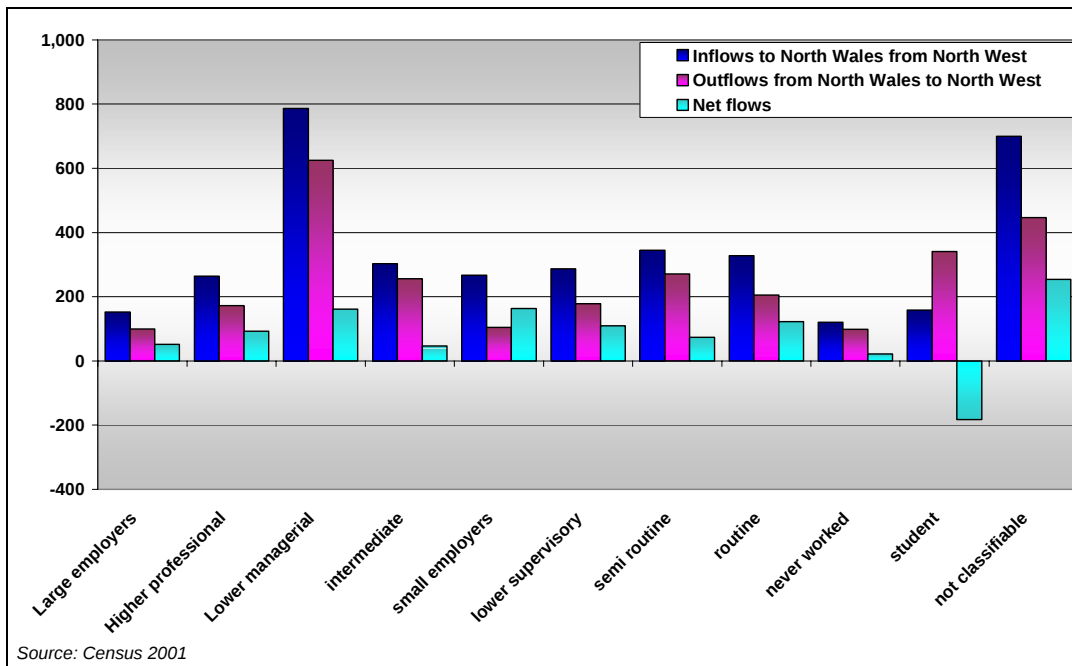


Figure 2.11 – Socio Economic characteristics of those moving between North Wales and the North West (2001)

2.2.2 Flows between Wales' coastal parts and London and the South East

Demographics

This section looks in more detail at the characteristics of those involved in the significant migrant flows between London and the South East of England to particular coastal areas of Wales. These coastal areas are in the South West of the country, namely Carmarthenshire, Ceredigion and Pembrokeshire.

According to the NHS Central Register, there was an inflow of 2,860 people to coastal South West Wales from London and the South East in 2005. This is up slightly from 2,730 in 1999. This inflow in 2005 compares with an opposite outflow of 1,890, meaning that there is a net in-migration to coastal South West Wales from London and the South East.

Figure 2.12 presents inflows to coastal South West Wales from London and the South East, outflows from coastal South West Wales to London and the South East and the net flows between coastal South West Wales and London and the South East, by each age group. With the exception of young people aged 16 to 24, this sub-region of Wales gains population across all age groups from London and the South East but particularly those of older working age (45 to 64).

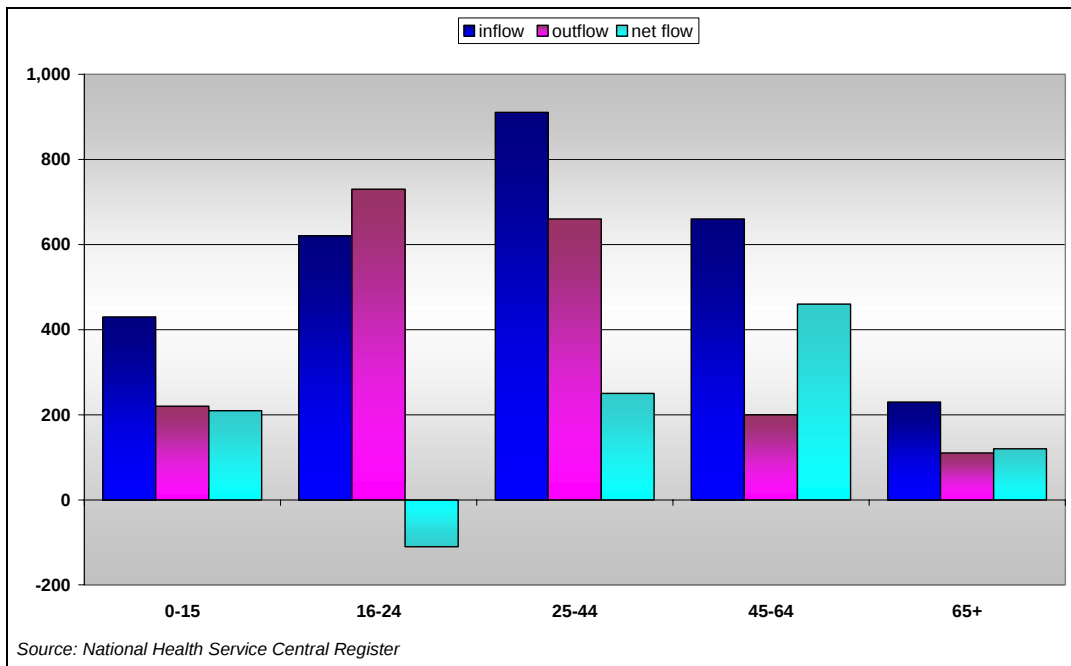


Figure 2.12 – In, out and net flows by age between London and South East and coastal south west Wales, 2005

Socio-economic groups

Experian's Movers data can also be used to examine how the socio-economic composition of the migrant flow between London and the South East and Wales differs from the composition of Wales' total population.

The largest social Groups in Wales, according the Experian's Mosaic UK classification system, are close-knit inner city and upwardly mobile families. The profile of people who move in to Wales from London and the South East is significantly different, with educated, young single people being by far the largest group, accounting for over one in five of in-migrants from these regions. Higher socio-economic groups (groups 1, 2 and 3), including higher income families and career professionals, are also over-represented in inflows to Wales from London and the South East.

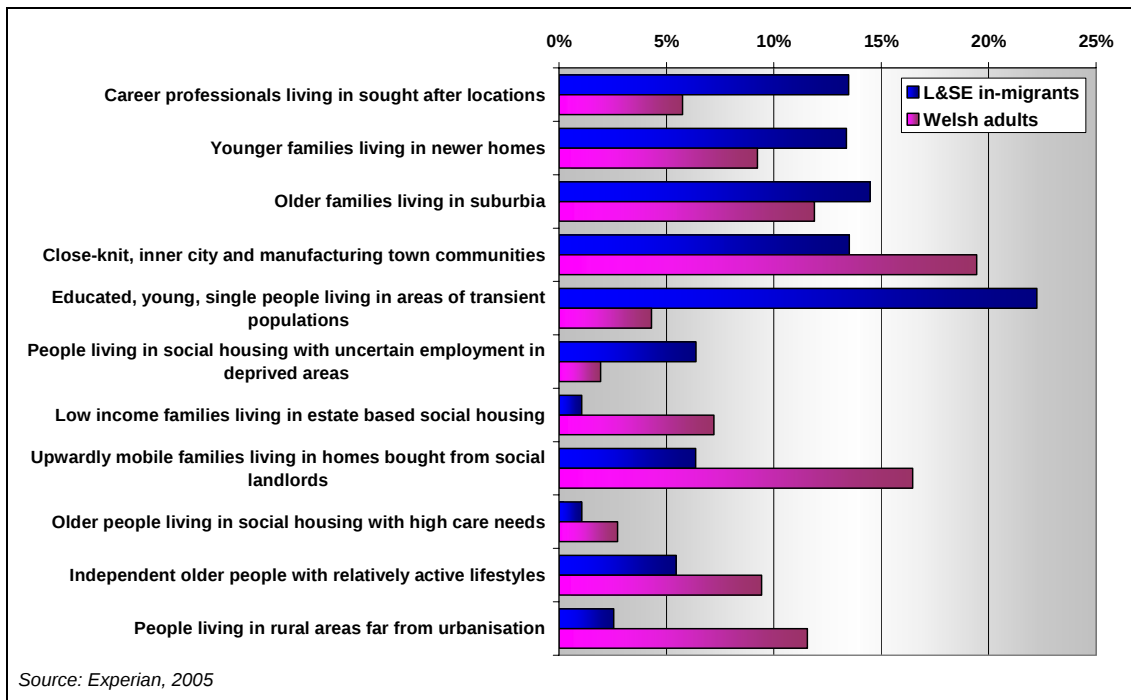


Figure 2.13 – Profile of in-migrants to Wales from London and South East versus Wales profile, 2005

It is also important to consider the profile of inflows relative to that of the resident population in the coastal parts of South West Wales. This analysis shows that the largest Group by far in the adult population is people living in rural areas, as would be expected given the rural characteristics of the sub-region.

The next largest Groups are independent older people, upwardly mobile families (right to buy owners) and close-knit inner city. By contrast, the profile of the in-migratory population is considerably more balanced across socio-economic Groups than the area's existing population. The most significant in moving Groups are close-knit inner city, people living in rural areas, older families and younger families (Figure 2.14).

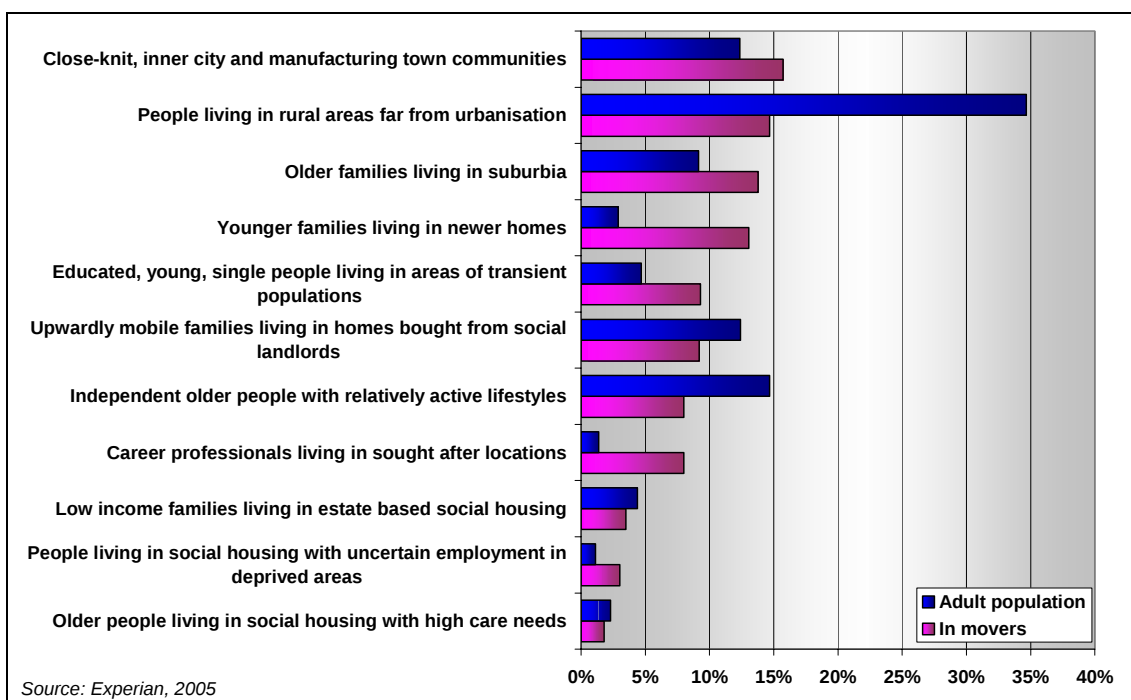


Figure 2.14 – Profile of in movers to coastal south west versus existing population in the area, 2005

The NHS Central Register data shows that the coastal South West of Wales pulls in working age people from London and the South East. Using the 2001 Census it is possible to develop some idea of how these people are employed in the area once they arrive.

In the year leading up to the Census, 1,520 people moved from London and the South East to the coastal South West. Within this migratory population, the most prevalent occupational groups were ‘lower managerial’ workers and ‘full time students’.¹¹ There is then a reasonably even spread of people across the remaining occupational categories.

Turning to outflows, 1,230 moved from the coastal South West of Wales to London and the South East meaning these parts of Wales were subject to a net inflow of just under 300 migrants from London and the South East in the year leading up to the Census. The socio-economic profile of outflows is broadly in line with that of inflows, with ‘Lower managerial’ workers and ‘full-time students’ also comprising a sizeable proportion of outflows.

However, while the coastal South West of Wales is subject to net inflows of most socio-economic groups, this part of Wales loses more ‘high professional’ and ‘lower managerial’ workers to London and the South East than it gains.

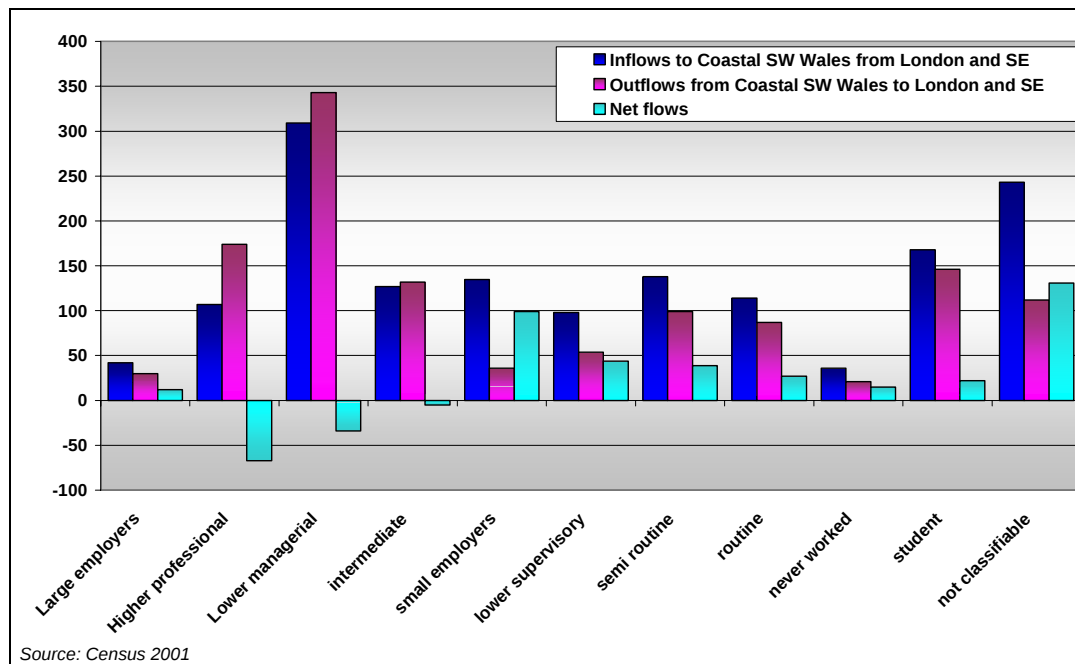


Figure 2.15 – Socio Economic characteristics of those moving between the Coastal South West of Wales and London and the South East (2001)

2.2.3 Flows between Wales' cities and London and the South East

Demographics

As noted earlier in the analysis, another interesting migration dynamic is the linkages between the Welsh cities (Cardiff and Swansea) and London and the South East.

Figure 2.16 presents inflows to the Welsh cities from London and the South East, outflows from the Welsh cities to London and the South East and the net flows between the Welsh cities and London and the South East. This chart suggests that the migration relationship between the two

¹¹ Defined as persons over 16 years of age engaged in full-time courses of study in secondary, tertiary or higher education institutions.

areas is characterised by movement of young people. Indeed, migration in both directions is dominated by 16 to 24 year olds, including students, and 25 to 44 year olds. In 2005, there was a small net outflow of 25 to 44 year olds but net inflows of 0 to 15 and 16 to 24 year olds.

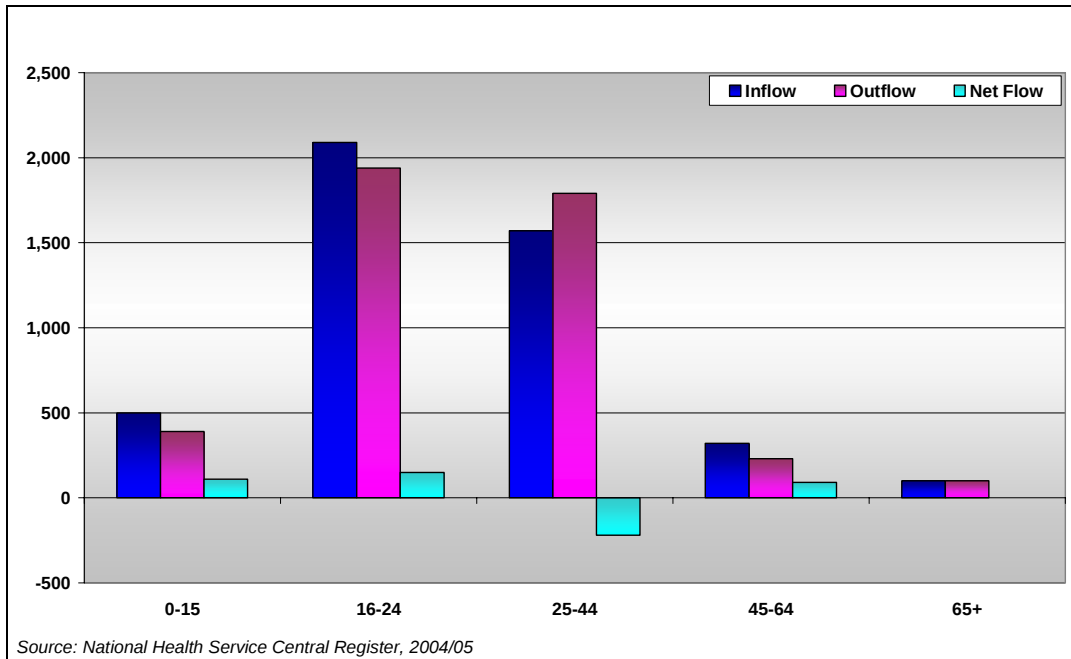


Figure 2.16 – In, out and net flows by age between Welsh cities and London and South East, 2005

Socio-economic groups

The Welsh cities have a distinct geo-demographic profile compared with the country as a whole. Wales' city population is characterised by educated, single, young people, close-knit inner cities and older families. However, the in-migrating population to the Welsh cities is more similar to the profile of the country as a whole, with close-knit inner cities forming the largest Group. Figure 2.17 below shows the differences between the in-moving profile and the existing population in the cities.

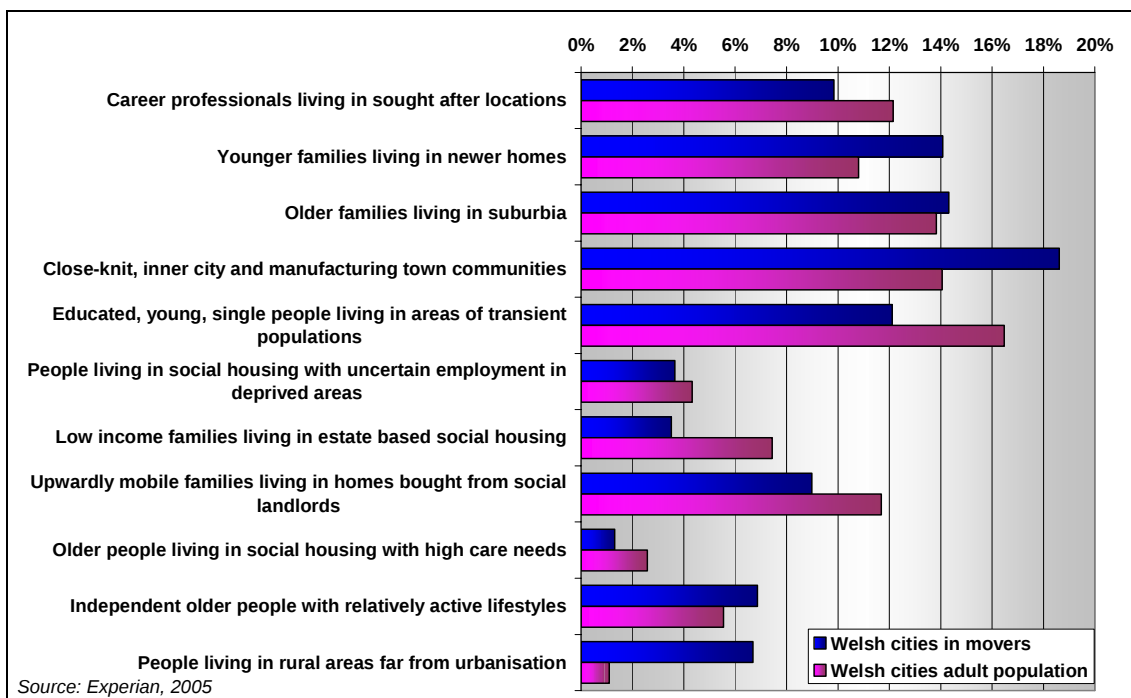


Figure 2.17 – Profile of in-migrants to Welsh cities versus existing Welsh cities adult population, 2005

The 2001 Census also allows us to look in more detail at the socio-economic characteristics of those engaged in migration flows between Wales' cities and London and the South East (Figure 2.18)

Analysis of the Census shows that both inflows to the Welsh cities from London and the South East and those moving in the opposite direction tend to be employed within higher professional and lower managerial occupations or students.

That said, in the year leading up to the Census, the Welsh cities' witnessed a significant **net** loss of higher socio-economic groups to London and the South East. Indeed nearly 1,000 more people of the highest socio-economic groups (large employers, higher professional and lower managerial) moved from Wales cities to London and the South East than moved in the opposite direction. The Welsh cities were, however, subject a **net** inflow of 300 full-time students over the same period.

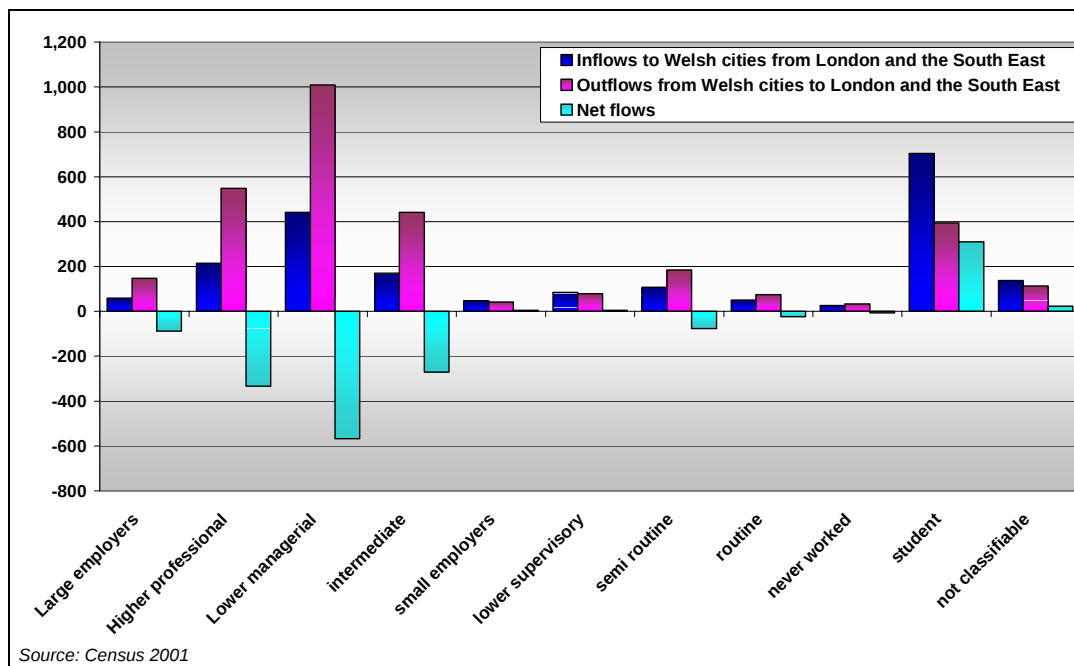


Figure 2.18 – Socio Economic characteristics of those moving between Wales' cities and London and the South East (2001)

2.2.4 Flows of disadvantaged groups between Wales and the rest of the UK

Finally, an issue of particular interest in this research is migration involving people from disadvantaged groups. We do not go in to detail here to define 'disadvantage' in this context. However, the concepts that we are mainly dealing with are income disadvantage and education / skills disadvantage. Therefore we have used the Mosaic geo-demographic segmentation system and the National Statistics Socio Economic Classification (NS-Sec) from the 2001 Census to analyse migration behaviour in these groups.

In using the 2001 census NS-Sec categories we have defined disadvantaged groups as comprising people classified as:

- Having never worked
- Carrying out routine jobs
- Carrying out semi-routine jobs

Using the *Mosaic* classification system we use the following Groups to approximate ‘disadvantaged groups’:

- People living in social housing with uncertain employment in deprived areas
- Low income families living in estate based social housing
- Upwardly mobile families living in homes bought from social landlords

Where are migrants from disadvantaged groups going in Wales?

Evidence from the 2001 Census suggests that Flintshire is the single largest destination for people from disadvantaged groups migrating to Wales (Figure 2.19). As later analysis shows, this is related to the fact that the neighbouring North West of England is the single largest region of England where Wales’ disadvantaged migrant groups originate. The next most significant destination is Cardiff. There is then a fairly even spread of migrants across the remaining Local Authority areas.

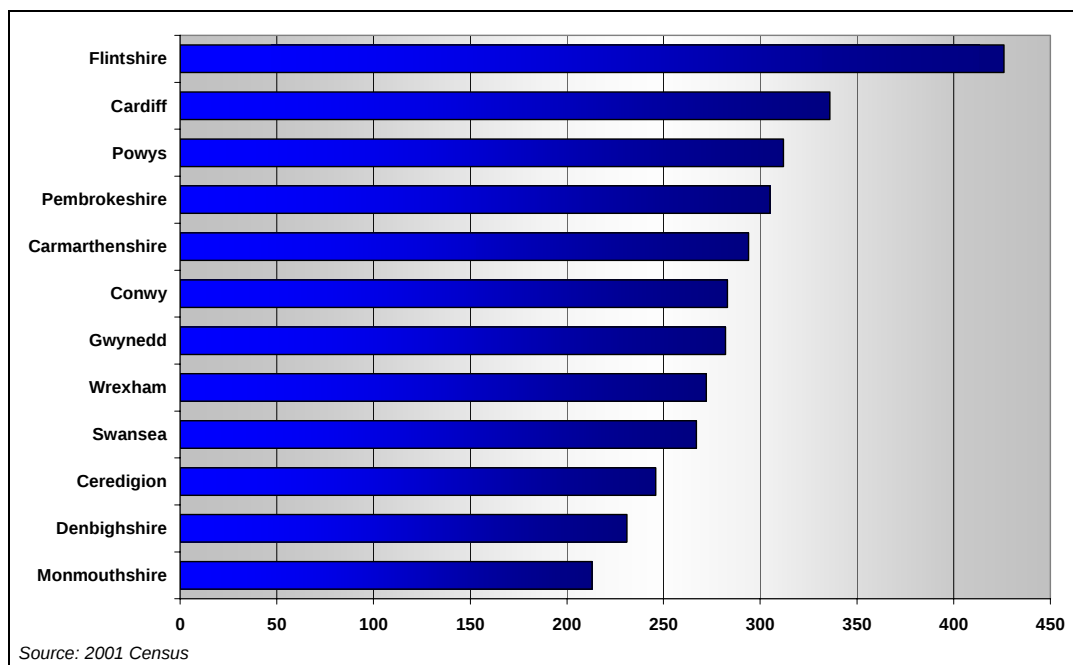


Figure 2.19 – Migration of disadvantaged groups from England to Local Authority areas in Wales, 2001

It is also useful to examine where in Wales migrants from the most disadvantaged groups move to (‘most’ disadvantaged defined as those being in the ‘never worked’ and ‘routine’ categories). Figure 2.20 presents migration disaggregated by the sub-groups for the top 12 Local Authorities with the highest inflows of these disadvantaged groups.

Clearly, North Wales (particularly Flintshire, Conwy and Wrexham) are subject to significant inflows of the most disadvantaged groups. This is also the case for Wales’ two largest cities – Cardiff and Swansea.

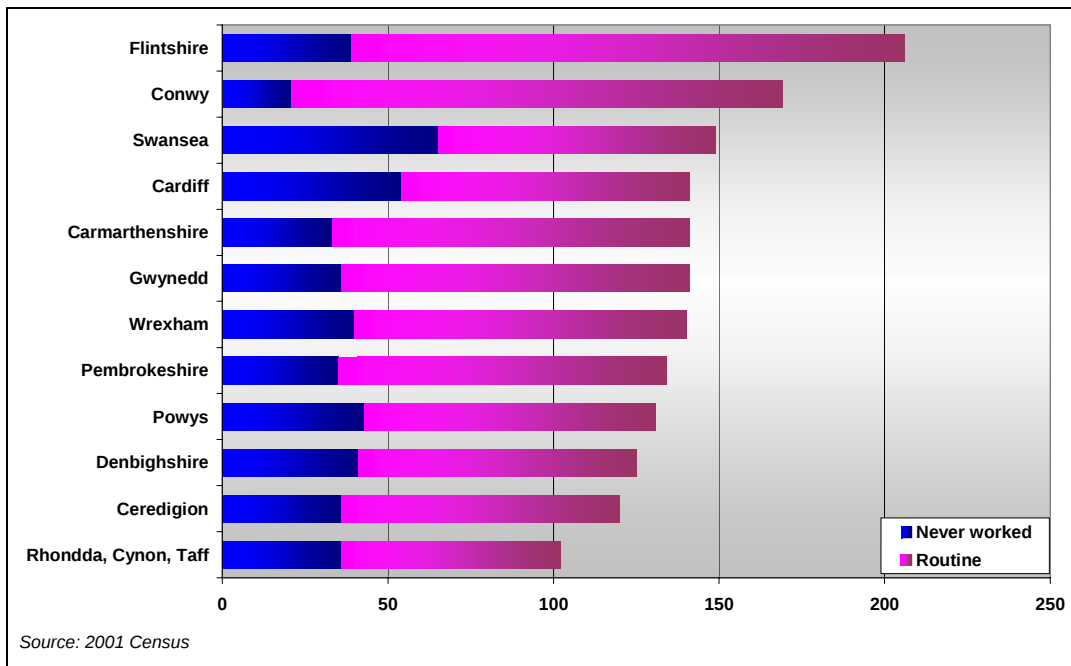


Figure 2.20 – Migration of the most disadvantaged groups from England to Local Authority areas in Wales by sub-group, 2001

Figure 2.21 illustrates migrants from disadvantaged groups (from both England and other Welsh districts) as a percentage of all migrants to an area using Experian's Movers data. In this chart we present the top twelve Local Authorities where disadvantaged migrants make up larger shares of the total in-migrating population. Clearly the South Wales Valleys area stands out as being an area characterised by migration from disadvantaged groups, relative to the rest of Wales. This may, however, reflect movements between districts of the Welsh Valleys.

It is also notable that North Wales attracts significant numbers of people from these groups, as suggested by the 2001 Census also, with Denbighshire and Flintshire in particular being a particularly important destination for migrants from the most disadvantaged groups (people living in social housing and low income families).

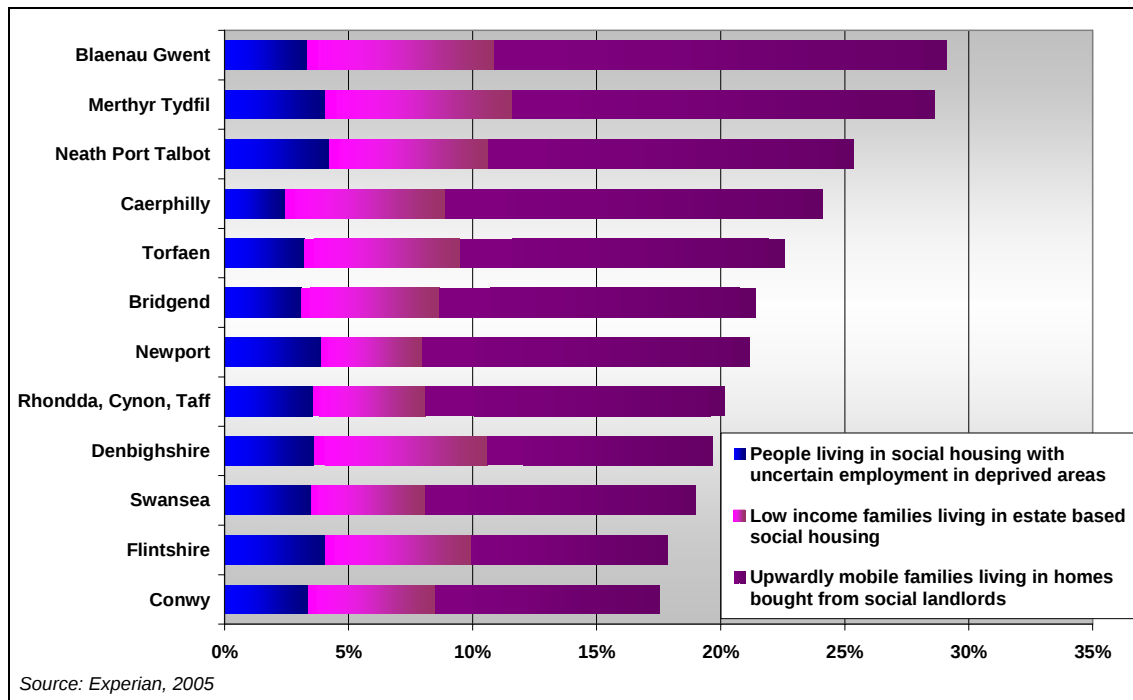


Figure 2.21 – In-migration to areas within Wales of key socio-economic Mosaic Groups (% of total in-migration to each area), 2005¹²

Where do migrants from disadvantaged groups come from?

Within disadvantaged groups migrating to Wales from England there is a clear pattern that Wales tends to attract these socio-economic groups from neighbouring regions rather than the greater South East of England. This differs from the picture across the whole population, outlined in Section 2.1, where movers from London were more significant to Wales' in-moving population.

Figure 2.22 illustrates the pattern of movement of disadvantaged groups to Wales from the English regions and suggests that North West and West Midlands are the most significant origins.

¹² It is important to note that, due to data limitations, Figure 2.20 presents **all** in-migration to Welsh districts, not just inflows from outside of Wales (as presented in Figure 2.19)

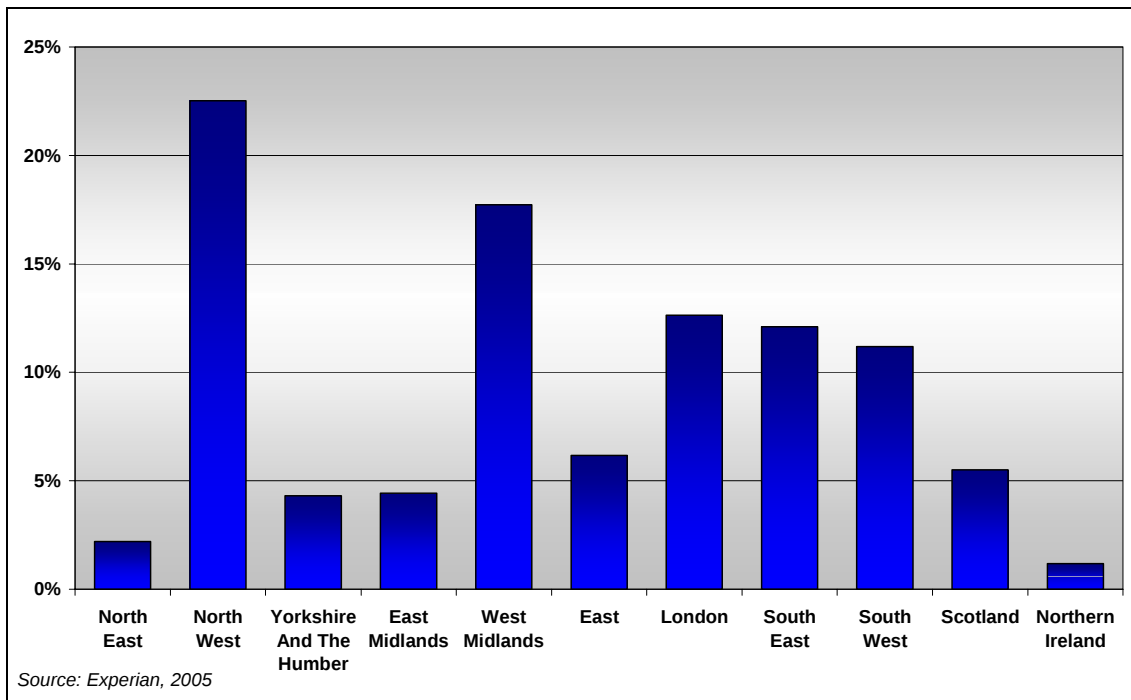


Figure 2.22 – Migration of disadvantaged groups from regions of the UK to Wales, 2005

Interestingly, while London is not the most common origin of all disadvantaged groups moving to Wales from England, the region is the most common origin of the *most* disadvantaged socio-economic group (defined as ‘people living in social housing with uncertain employment in deprived areas’ for Experian/Mosaic data).

In contrast, the ‘low income families living in estate-based social housing’ sub-group originate most prominently from North West and West Midlands (Figure 2.23). However, there is a particularly high proportion of ‘people living in social housing with uncertain employment in deprived areas’ moving to Wales from London.

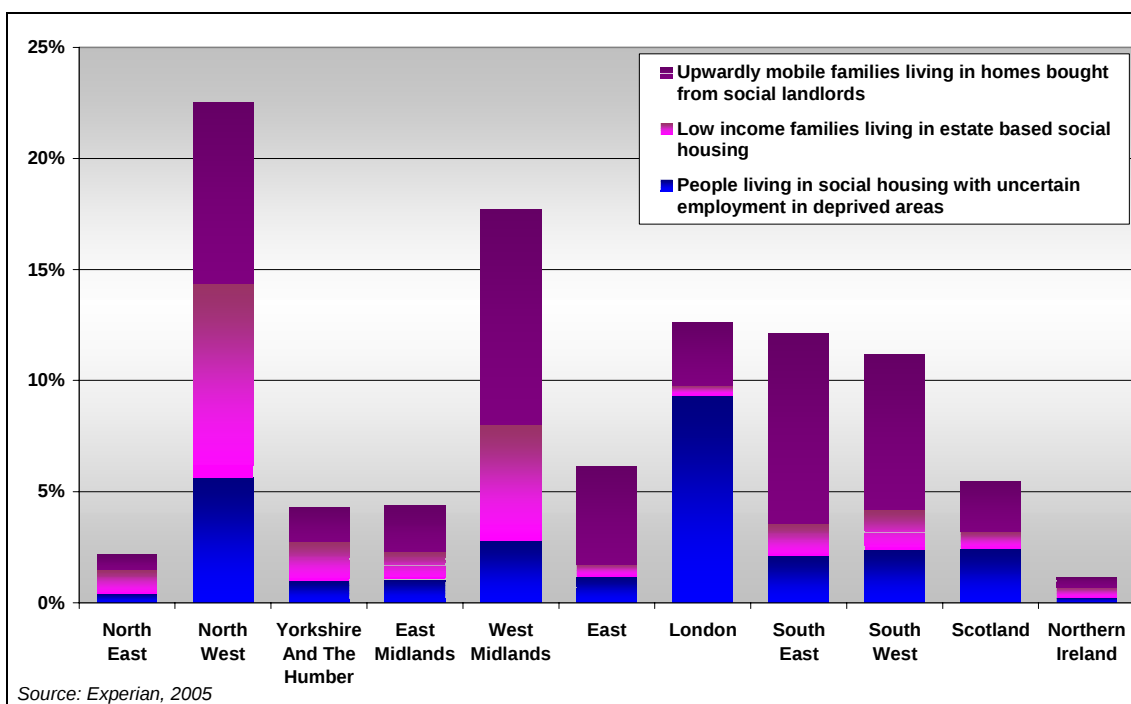


Figure 2.23 – Migration of the most disadvantaged groups from regions of UK to Wales by sub-group, 2005

Clearly, there is a close relationship between the regions of England that migrants from disadvantaged groups move from and where they move to within Wales. Most obviously, the significance of the North West as an origin for migrants to Wales amongst disadvantaged groups is echoed by the large numbers of migrants from disadvantaged groups that move to North Wales.

*Which areas gain the largest **net** inflows of disadvantaged migrants from England?*

Whilst the previous two sections have provided a detailed insight into the origins and destinations of disadvantaged groups moving into Wales, it is also useful to consider which areas gain the largest **net** flows of such migrants. Whilst some districts have experienced large inflows of disadvantaged migrants, it is notable that many of these districts, particularly Cardiff, have also experienced large outflows of such migrants to England. This is highlighted in Figure 2.24, which shows the twelve largest Local Authorities in terms of outflows of this group.

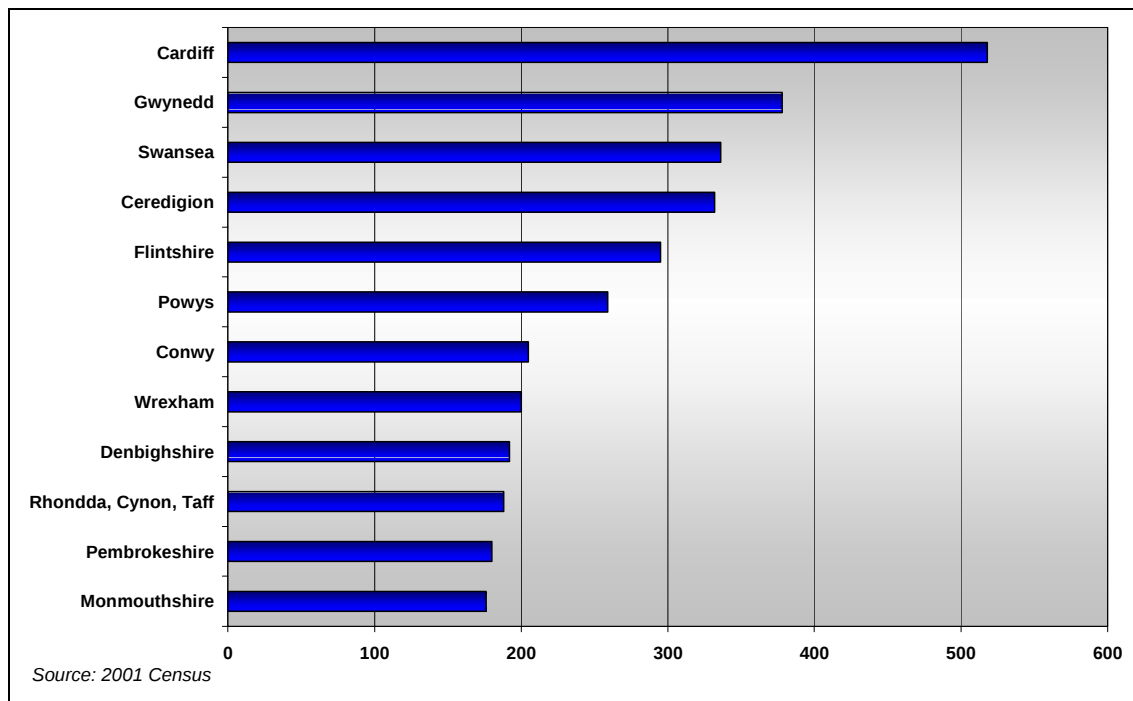


Figure 2.24 – Migration of disadvantaged groups from Welsh districts to England, 2001

Figure 2.25 presents the migration patterns of disadvantaged groups between Wales and England, expressed in net terms. It can be seen that many of the northern districts are large net importers of disadvantaged migrants, notably Flintshire, Conwy and Wrexham. Flintshire remains the largest importer of disadvantaged groups – with a positive balance of 130 in the year leading up to the Census. Cardiff is the largest net exporter of such migrants to England, with a net outflow of -180, whilst Swansea also had a negative net balance.

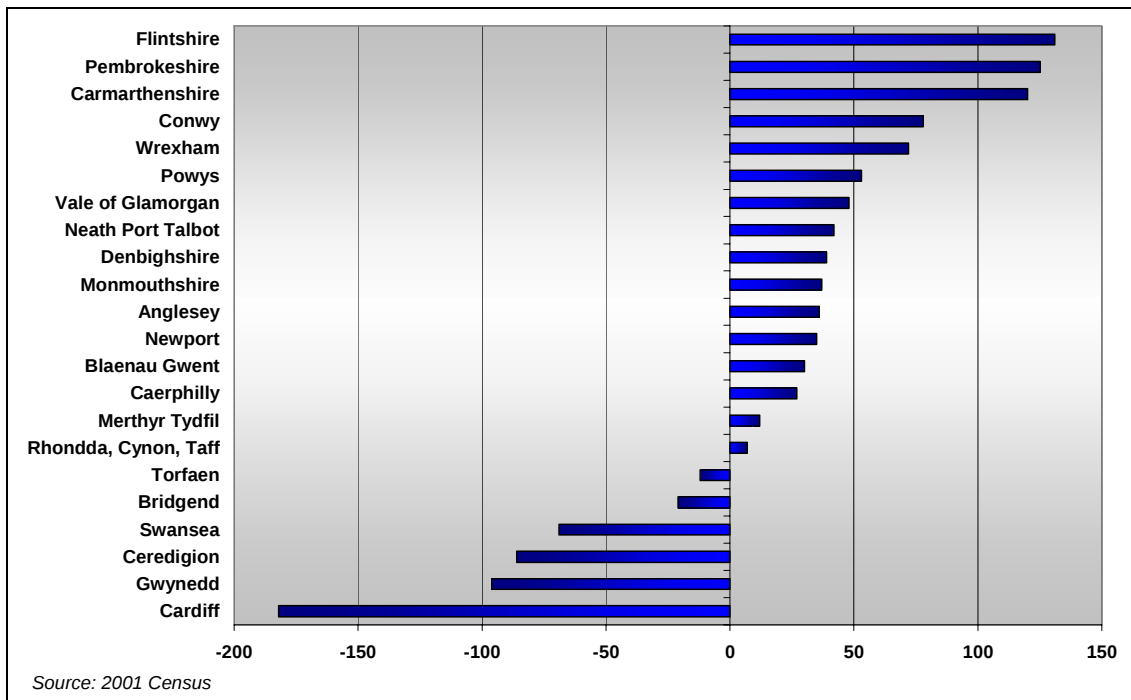


Figure 2.25 – Net migration of disadvantaged groups between Welsh districts and England, 2001

Figure 2.26 considers net migration patterns between the Welsh districts and England of the ‘most’ disadvantaged groups (those who have never worked and those in routine occupations). Again, it can be seen that Flintshire, Conwy and Wrexham all gained net inflows of these groups, whilst Gwynedd had a negative balance of just under 50. In the south, Cardiff and Swansea both had a marginally negative balance, of just under 60 and 20 migrants respectively.

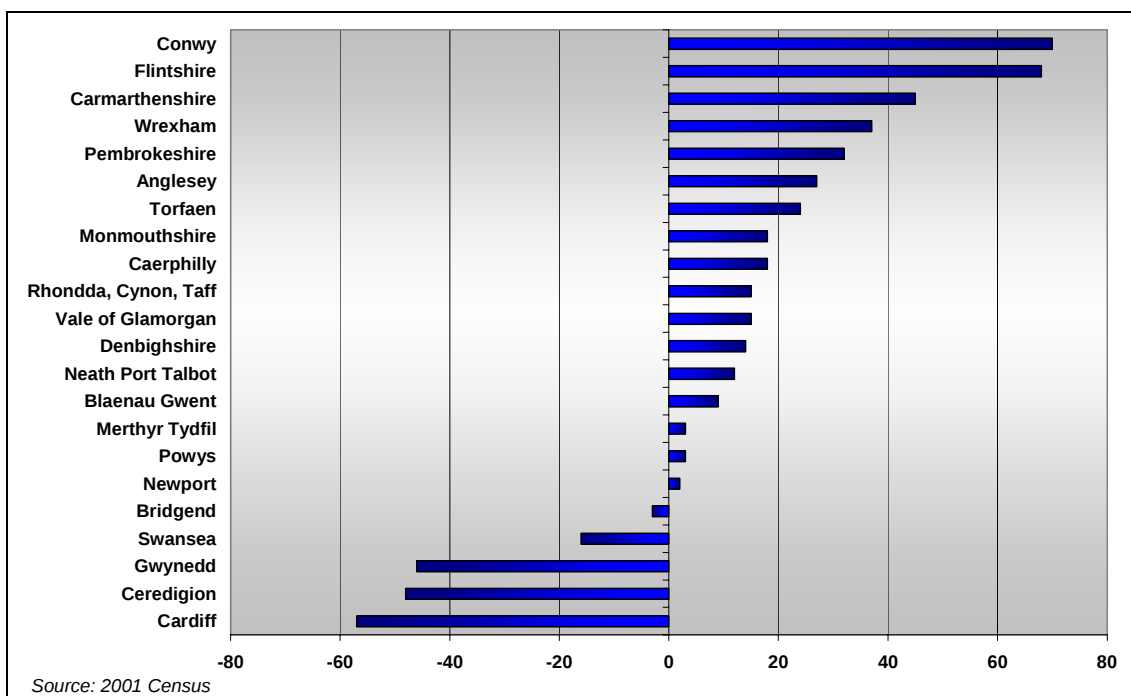


Figure 2.26 – Net migration of the most disadvantaged groups between Welsh districts and England, 2001

3 Migration patterns within Wales

KEY MESSAGES

- The largest urban centres in Wales – Cardiff and Swansea – experience the largest **gross** migration flows. The districts bordering the major urban centres, such as Rhondda, Cynon, Taff and Carmarthenshire also experience substantial levels of migration - both inflows and outflows.
- Latest NHS Central Register data suggests large **net** outflows from Cardiff (to the magnitude of 3,150 migrants between 2002 and 2005). Conversely, the districts bordering Cardiff and Swansea and the more rural areas in Wales experienced the largest **net** inflows.
- Such patterns have raised suggestions of 'city flight' – workers moving away from urban centres to neighbouring suburban and rural locations and between 2002 and 2005, Cardiff and Swansea were indeed net exporters of migrants to their neighbouring districts.
- The NHS Central Register suggests that a higher proportion of in-movers to Cardiff and Swansea tend to be in the younger adult age groups (15-29) whilst in-movers to more suburban and rural districts tend to be families or individuals in the older age groups.
- The 2001 Census shows that Cardiff received large net inflows of 16-24 year olds but large net outflows of 25-44 year olds, 45-64 year olds and those aged 65 and over. This partly reflects Cardiff's appeal to students – the Census shows that Cardiff received large net inflows of students from other Welsh districts.
- The Census highlights similar patterns in Swansea. Swansea also received a large net inflow of students (although less than half that of Cardiff), whilst both Cardiff and Swansea received net inflows of routine workers. Whilst Swansea saw net outflows of higher managerial workers, Cardiff received net inflows.

3.1 HEADLINE MIGRATION FLOWS WITHIN WALES

Internal migration flows within Wales are significant – in 2001, 81,670 individuals moved between the Welsh districts.

As would be expected, the largest urban centres in Wales experienced the largest inflows and outflows of migrants. In 2001, Cardiff experienced an inflow of 6,120 individuals and an outflow of 5,980, and Swansea an inflow of 2,870 individuals and an outflow of 2,950. The districts bordering the major urban centres, such as Rhondda, Cynon, Taff and Carmarthenshire also saw substantial levels of migration, both inflows and outflows.

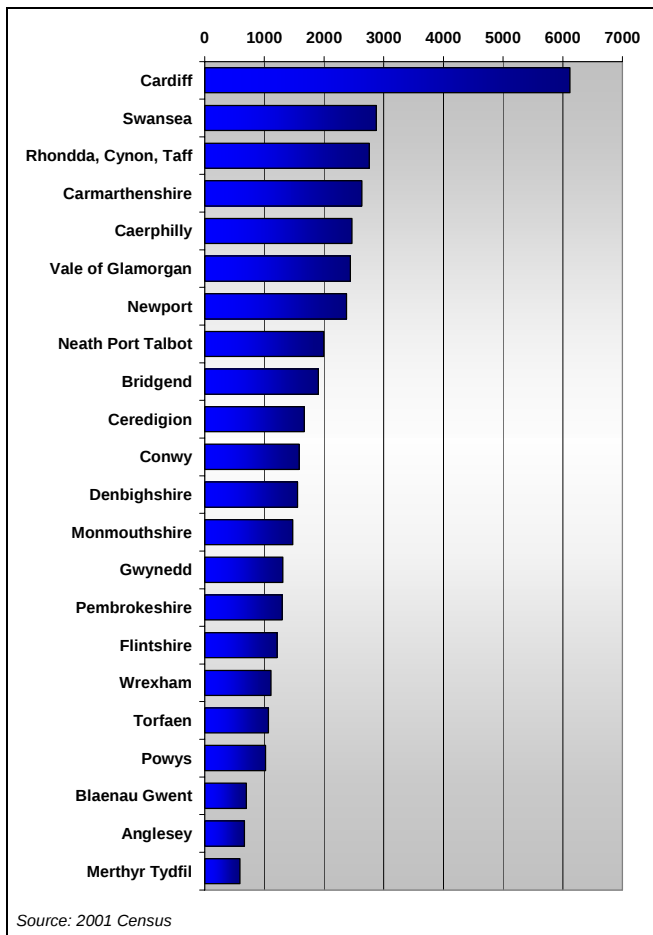


Figure 3.1 – Migration inflows from other Welsh districts, 2001

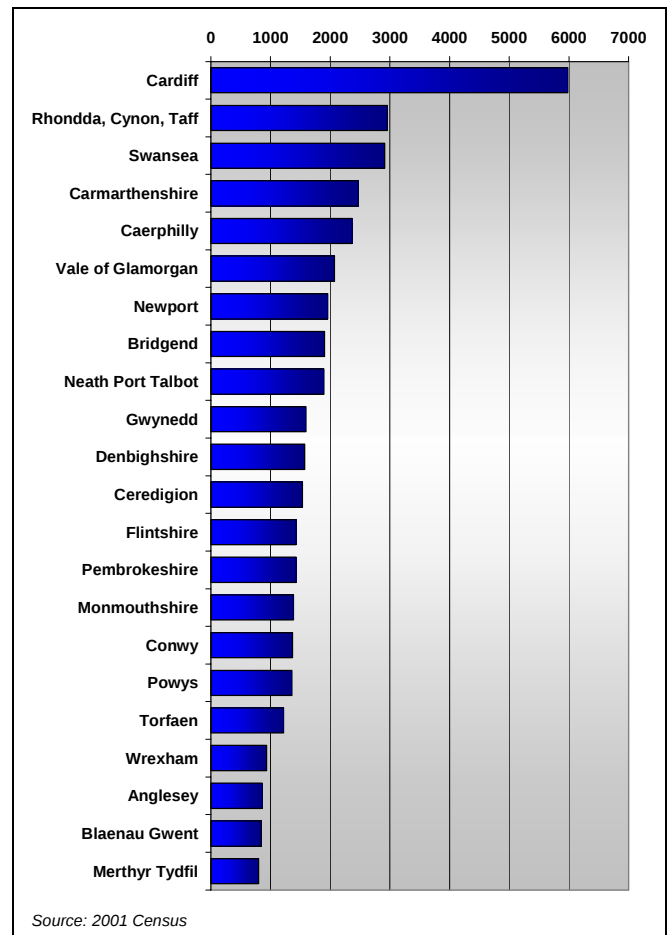


Figure 3.2 – Migration outflows to other Welsh districts, 2001

However, the picture is markedly different when we examine the net flows of migrants between Welsh districts. Indeed, Swansea and Cardiff experienced very minor net migration flows – Cardiff gained 140 migrants and Swansea had a net outflow of 40 migrants.

It was the districts bordering Cardiff that experienced the largest net inflows of migrants. Newport and The Vale of Glamorgan gained 415 and 370 migrants respectively. The districts bordering Swansea were also net gainers of migrants – Carmarthenshire gained 170 individuals and Neath Port Talbot a net inflow of 100 migrants.

The Welsh districts with the largest net losses of migrants in 2001 were many of the more rural areas; Powys (-340), Gwynedd (-280), Flintshire (-220) and Merthyr Tydfil (-210).

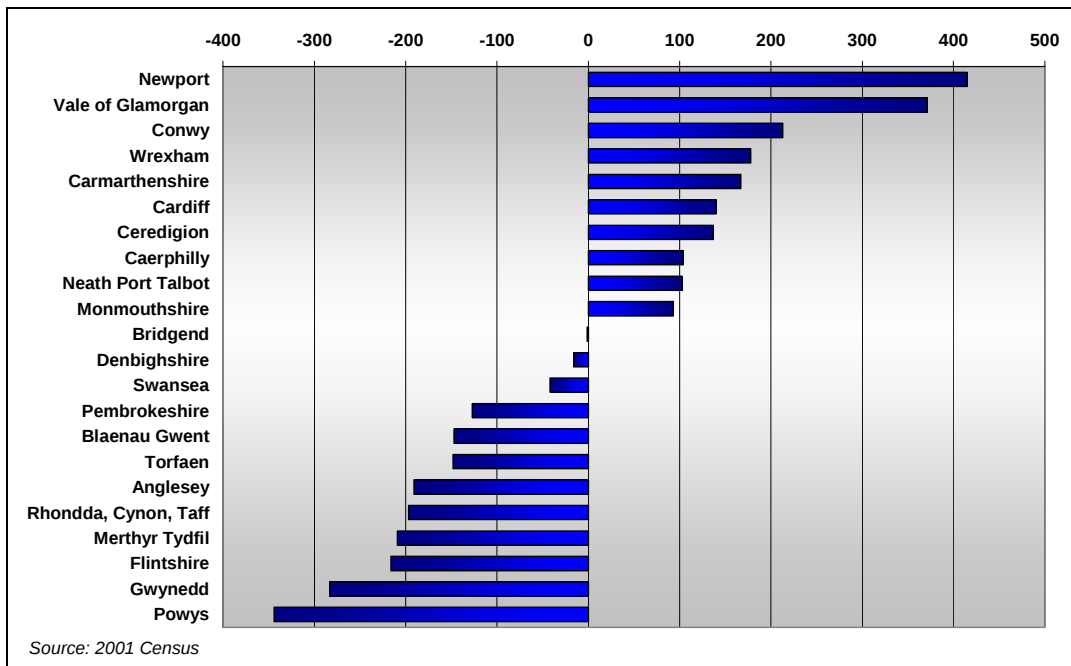


Figure 3.3 – Net migration flows between Welsh districts, 2001

Evidence from the NHS Central Register (NHSCR) provides a useful alternative and more up to date source of migration data than the 2001 Census. It also indicates some different internal migration trends than the 2001 Census data – there is less evidence of significant net out-migration from more rural areas such as Powys and in contrast to the 2001 Census data, the NHSCR data suggests a significant net outflow of migrants from Cardiff.

The NHSCR data shows that between 2002 and 2005 Cardiff had a total net-outflow of 3,150 migrants. Nine other districts showed a net-outflow of migrants between 2002 and 2005, although these were relatively small compared to Cardiff.

While the districts bordering Cardiff and Swansea again experienced the largest net-inflows, the more rural areas in Wales also witnessed substantial net gains of migrants. Bridgend witnessed the largest net in-flow of migrants between 2002 and 2005 at 1,260. This was followed by Rhondda, Cynon, Taff with a net in-migration of 1,150, The Vale of Glamorgan (1,050), the Isle of Anglesey (820), Carmarthenshire (750) and Neath Port Talbot (720).

The net gain of migrants into these rural districts and districts bordering the key employment centre of Cardiff may reflect a pattern of ‘city-flight’, which sees a move of individuals away from cities to more rural and suburban areas which are still within commutable distance of key employment centres.

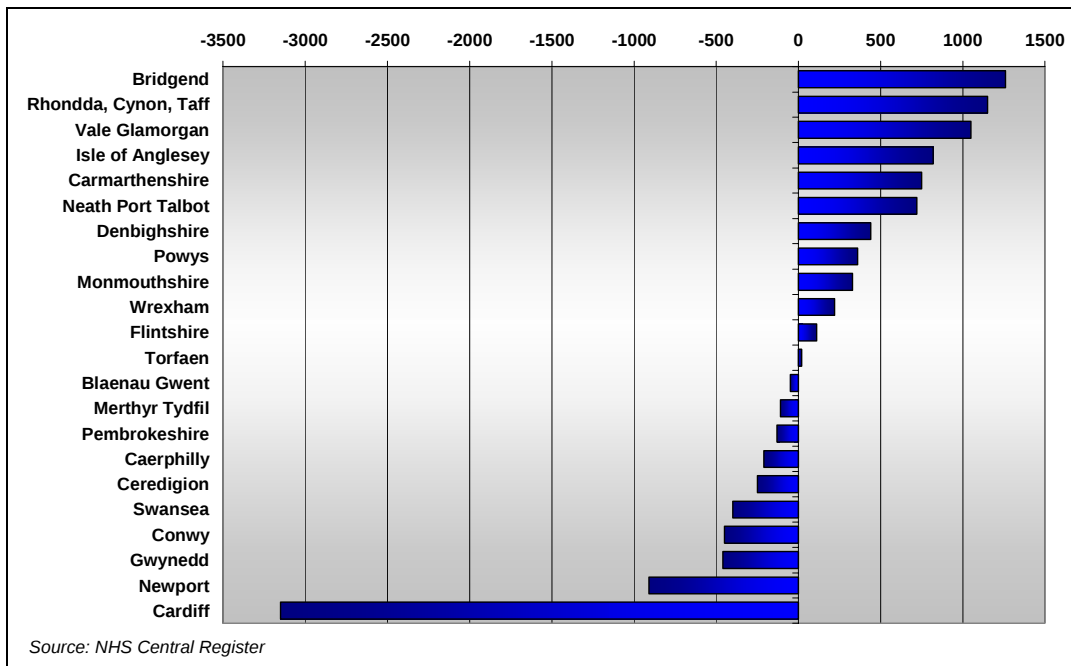


Figure 3.4 – Net migration flows between Welsh district. 2005/06

What evidence exists of 'City Flight' migration patterns?

The analysis of the NHSCR data indicates that patterns of internal migration flows within Wales are dominated by flows from Cardiff to other Welsh districts. In 2005, Cardiff accounted for 16 per cent of all outflows from Welsh districts to other Welsh districts.

Between 2002 and 2005, there have been consistent and significant outflows of migrants from Cardiff to the neighbouring districts of The Vale of Glamorgan; Rhondda, Cynon, Taff; Caerphilly; and Newport, as well as to Bridgend. Indeed over this period, 7,720 migrants left Cardiff and moved to The Vale of Glamorgan; 5,400 to Rhondda, Cynon, Taff; 3,430 to Caerphilly; 2,920 to Newport; and 1,890 to Bridgend, further compounding evidence of a trend of 'city-flight' from Wales' capital.

While Cardiff also accounted for the largest proportion of in-flows, the Capital lost significantly more migrants to neighbouring districts than it gained between 2002 and 2005 (Figure 3.5).

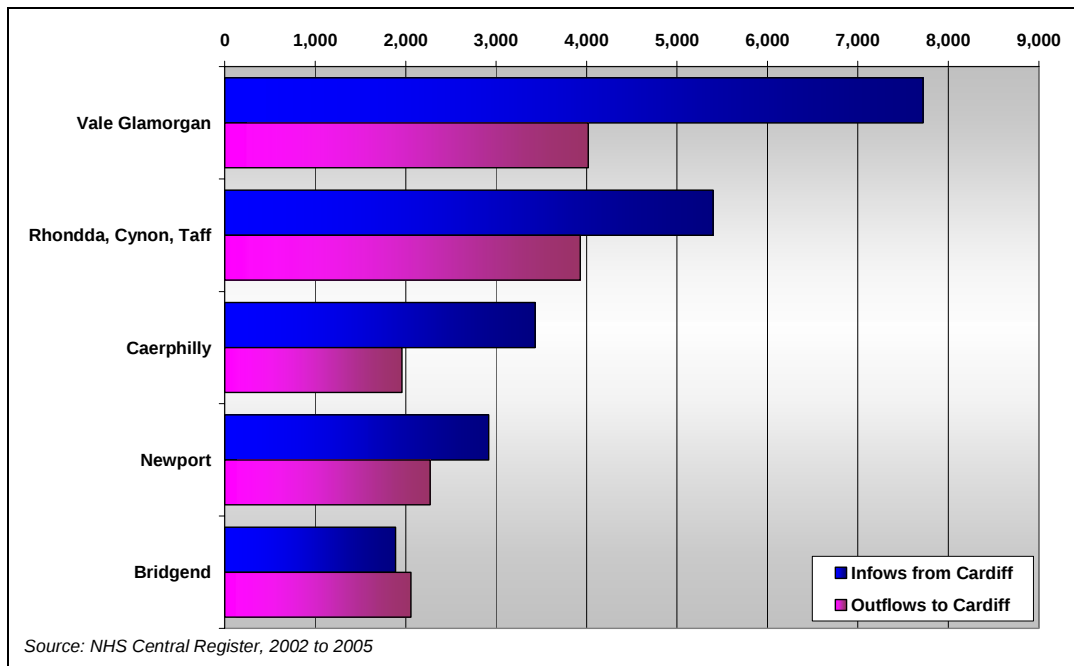


Figure 3.5 – Migration patterns between Cardiff and surrounding areas, 2002 to 2005

As would be expected for the largest city in Wales, Cardiff is the focus of much of the internal migration flows in Wales. However, the NHS Central Register data indicates that there are also some other significant and sustained migration patterns within Wales. Swansea accounts for the second largest volume of migration flows in Wales and as was the case with Cardiff the origin or destination of the majority of these migrants are those districts neighbouring Wales' second city.

Migration flows between Swansea and Neath Port Talbot were significant, with 3,960 individuals moving from Swansea to Neath Port Talbot between 2002 and 2005, while 3,210 individuals migrated in the opposite direction. Substantial migration flows were also evident between Swansea and Carmarthenshire, with 3,040 individuals moving from Swansea to Carmarthenshire and 2,490 migrating from Carmarthenshire to Swansea. Like Cardiff, Swansea was also a net exporter of migrants to its neighbouring districts.

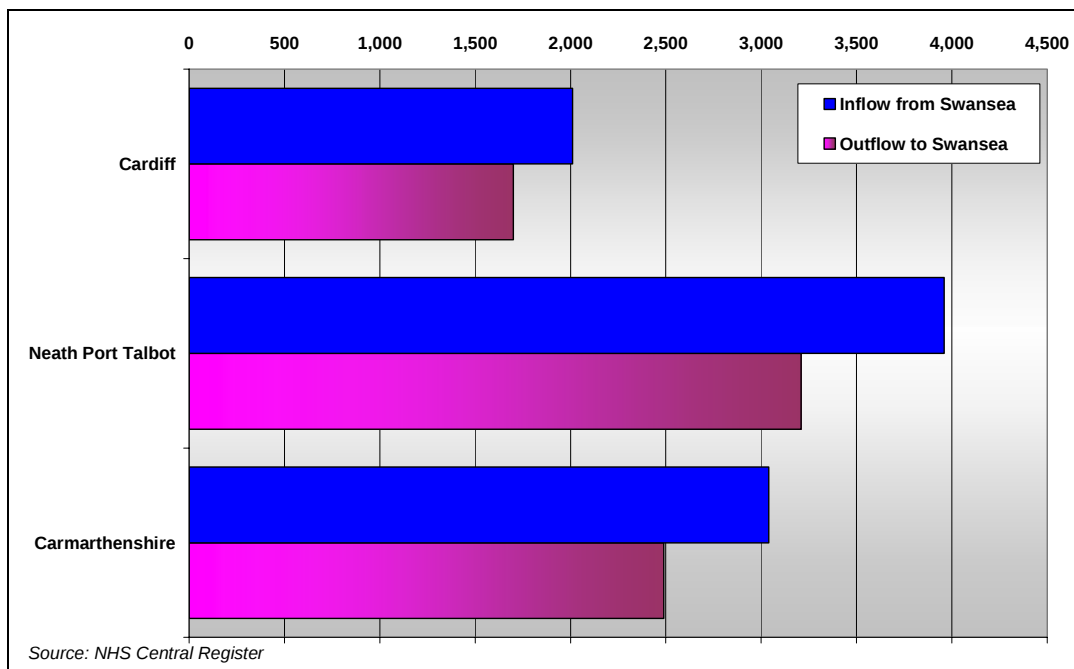


Figure 3.6 – Swansea migration inflows and outflows by origin/destination 2002 to 2005

3.2 WHAT ARE THE SOCIO-DEMOGRAPHIC CHARACTERISTICS OF MIGRANTS ENGAGED IN THESE INTRA WALES MOVEMENTS?

Having identified the key internal migration patterns within Wales it is useful to examine the demographic and socio-economic characteristics of migrants engaged within these flows.

The NHS Central Register suggests that a higher proportion of in-movers to Cardiff and Swansea tend to be in the younger adult age groups (15-29) and that in-movers to more suburban and rural districts tend to be families (those aged over 35 and often with dependents 0-15 year olds) or individuals in the older age groups.

This trend ties in with much of the research into ‘city flight’ migration patterns that suggests that young single adults are attracted to urban centres to pursue career and learning opportunities, while families and older, wealthier individuals are attracted to suburban and rural areas which offers a high quality of life and suitable family housing (often detached houses with gardens etc).

Demographics

The 2001 Census data on intra-regional migration patterns in Wales provides data on the characteristics of migrants and suggests some discernable trends in migration flows across different age groups.

In the year before the 2001 Census the majority of individuals aged 16 to 24 who migrated within Wales, moved to Wales’ largest cities – Cardiff and Swansea, which witnessed net inflows of this age cohort of 1,350 and 200 respectively (Figure 3.7). Indeed, it is important to note that this is the only age group to record a net inflow into the Welsh cities. Ceredigion, Wrexham and Newport were the only other districts to have a net inflow of individuals aged between 16 and 24.

It was the more rural areas of Wales that recorded the largest outflows of the 16 to 24 year old age group – Powys had a net outflow of 260 and Pembrokeshire a net outflow of 200 to elsewhere in Wales.

These patterns of migration are in alignment with those found more widely across the UK, with younger age cohorts attracted to urban centres to access employment and education opportunities, as well as the enhanced retail and leisure services.

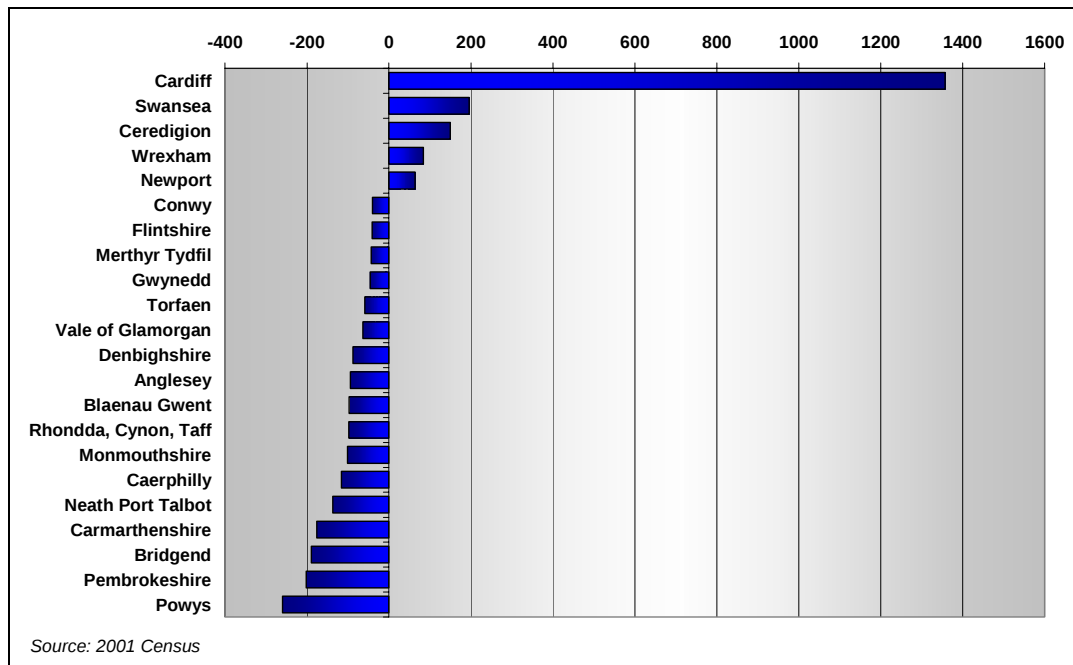


Figure 3.7 – Net migration flows of 16-24 year olds between Welsh districts, 2001

Conversely, Wales' urban centres (particularly Cardiff) witnessed significant net outflows of those aged between 25 and 44 years of age to elsewhere in Wales (Figure 3.8). Indeed, it is more rural areas, particularly those within commutable distance of urban centres, which have experienced net inflows of this age cohort from other Welsh districts. The largest net inflows of 25-44 year olds occurred in The Vale of Glamorgan (290), Newport (250) and Caerphilly (150), districts that border Wales' capital.

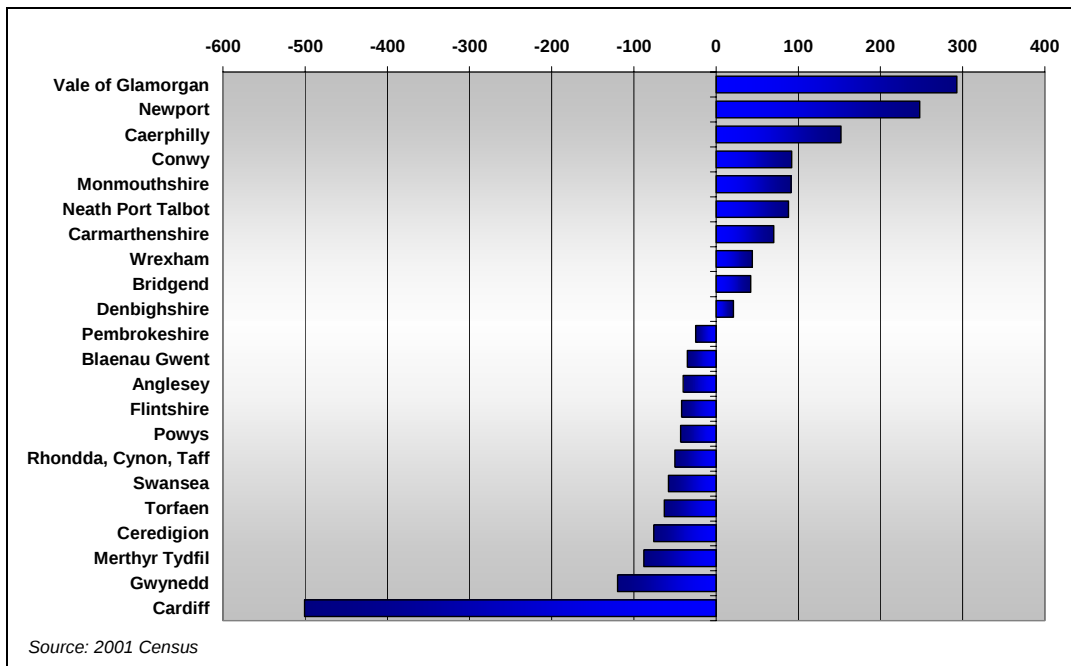


Figure 3.8 – Net migration flows of 25-44 year olds between Welsh districts, 2001

The net outflow from the cities continues for the 45 to 64 age cohort with Cardiff and Swansea both experiencing a net out-migration of this age group of 260 and 80 respectively. Again, the more rural areas of Carmarthenshire, Pembrokeshire and Conwy witnessed the largest net inflows of 45-64 year olds, gaining 135, 90 and 85 migrants respectively (Figure 3.9).

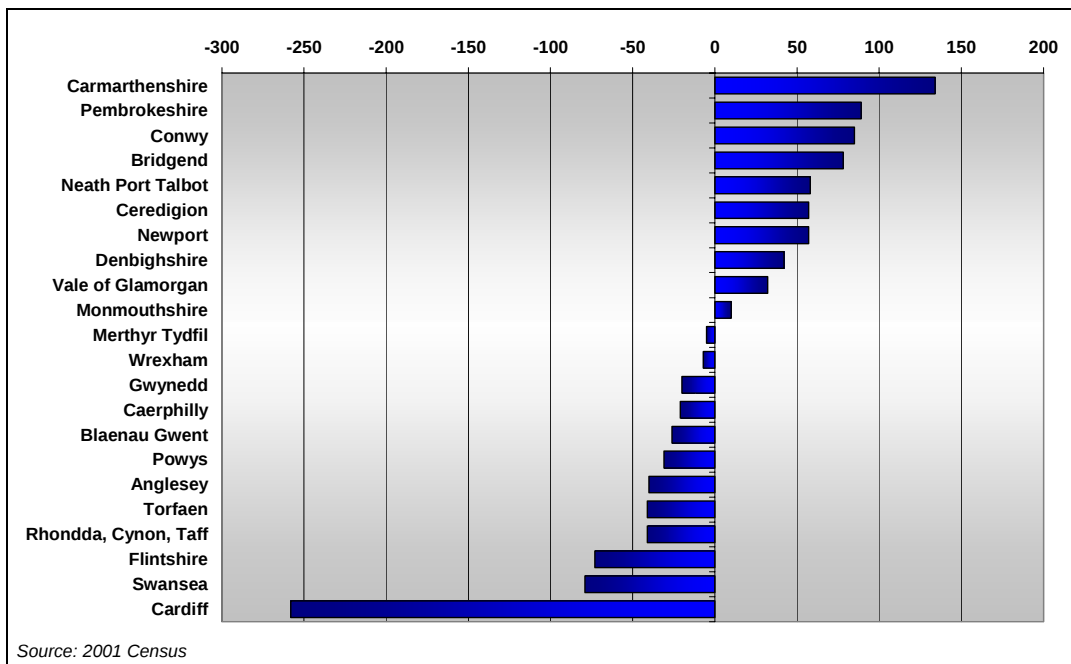


Figure 3.9 – Net migration flows of 45-64 year olds between Welsh districts, 2001

Migration flows for those aged 65 and over are much lower than for the other age groups as people are likely to be retired and therefore tend not to be influenced by the need to move for work-related reasons. Flintshire witnessed the largest net outflow of those aged 65 and over, although there is also a net outflow of this age group from both Swansea and Cardiff. Wrexham and Torfaen experienced the largest net inflows (Figure 3.10)

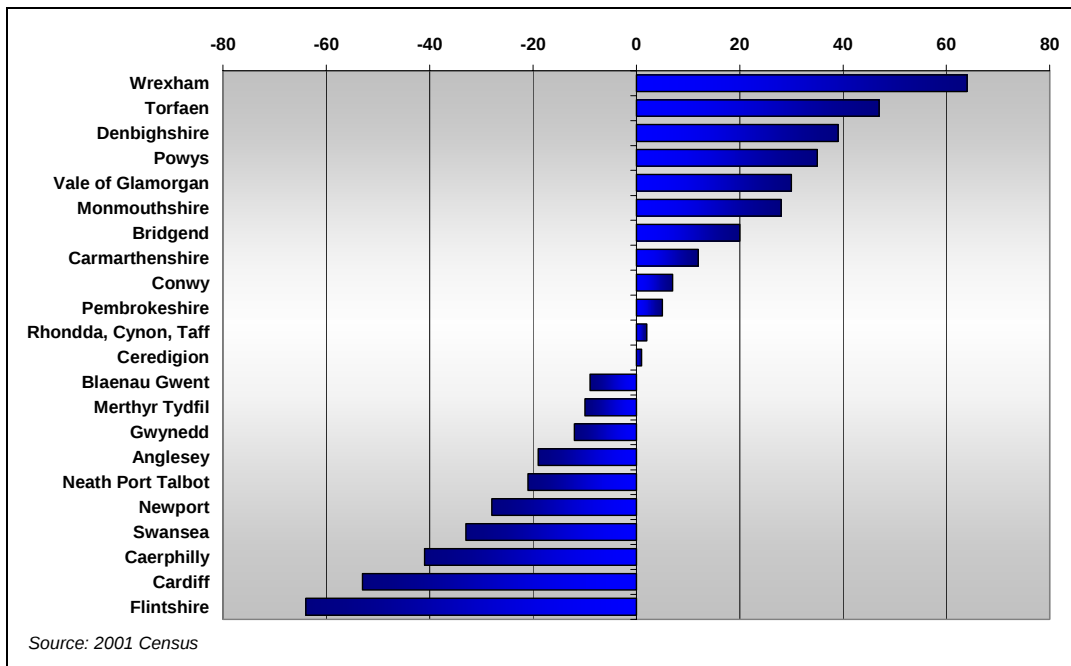


Figure 3.10 – Net migration flows of those aged 65+ between Welsh districts, 2001

In summary, evidence from the Census illustrates a clear pattern of migration flows by age group with young adults aged between 16 and 24 years old being attracted to Wales' largest cities – Cardiff and Swansea – while there is evidence that older age cohorts are moving out of the cities to more rural and suburban areas.

Socio-economic groups

The Census also provides information on the socio-economic group of migrants, based on their occupation of employment (NS-Sec).

Figure 3.11 illustrates net-migration patterns for Cardiff. In 2001, Cardiff experienced a net inflow of students, reflecting the significant university presence in the city. The only other Welsh districts that experienced a net in-flow of students were Swansea, Wrexham and Ceredigion, again reflecting (at least in part) the presence of higher education institutions in these areas.

Cardiff also experienced a significant net inflow of those working within routine occupations, while areas bordering the city witnessed a net inflow of higher managerial workers, who may in fact still work in Cardiff but commute into the Capital.

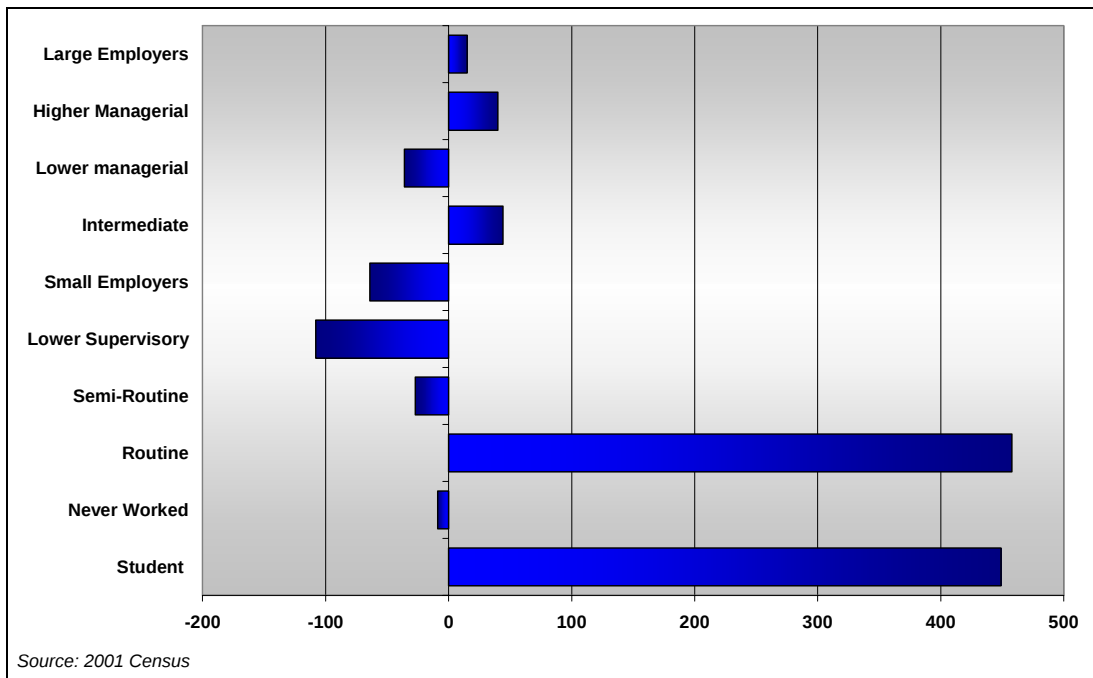


Figure 3.11 – Net migration flows between Cardiff and other Welsh districts by NS-Sec, 2001

Similar patterns are evident in Swansea with the largest net inflows being comprised of students and those in routine occupations, whilst in contrast to Cardiff, the city experienced a net outflow of higher and lower managerial occupations (Figure 3.12).

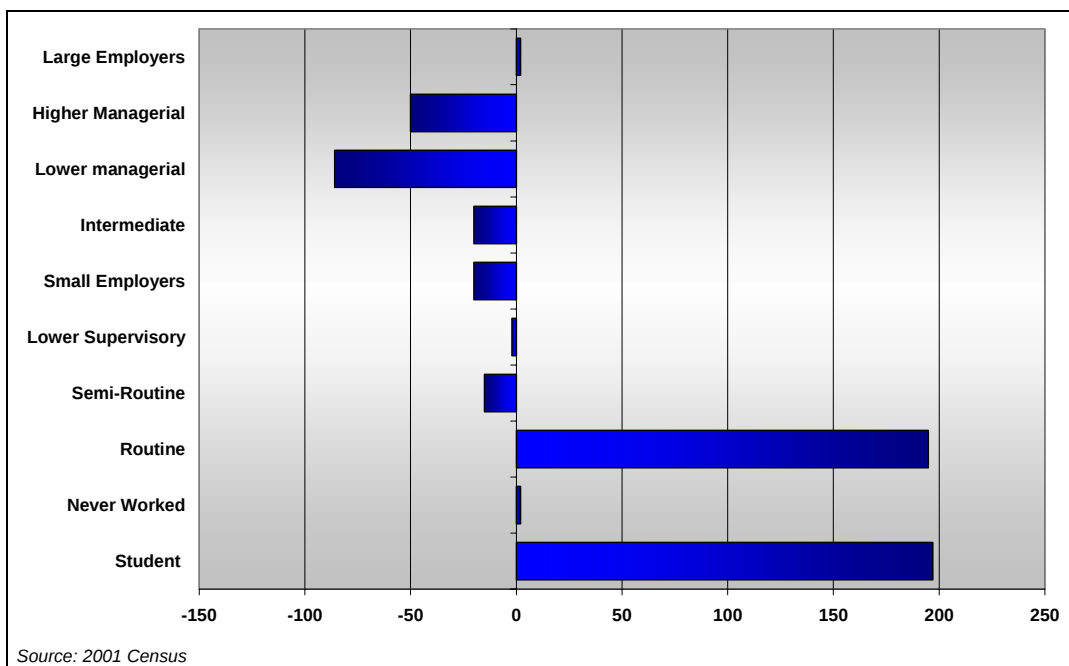


Figure 3.12 – Net migration patterns between Swansea and other Welsh districts by NS-Sec, 2001

Evidence from Experian's Movers data provides additional and more up-to-date information on the socio-economic characteristics of those engaged in intra-Wales migration patterns. Since much of the migration activity in Wales is concentrated around the urban centres, the Movers data for Cardiff and Swansea has been analysed in some detail below.

Experian's Movers data suggests that Cardiff no longer loses significant numbers of higher socio economic groups, rather the capital attracts a slight net inflow of older families (Group 3). The most notable trend affecting Cardiff is in fact a significant net outflow of educated, young,

single people living in areas of transient populations (Group 5) – these flows are concentrated in ‘well-educated singles and childless couples’ and ‘short term student renters’. The Group 5 definition in fact overlaps with various Census categories, so it is not possible to identify 16-24 year olds and 25-44 year olds specifically within Group 5.

Similar patterns are apparent for Wales’ second city, Swansea, which has also experienced slight net-inflows of older families (Group 3) and those from inner city and manufacturing town communities (Group 4), but net-outflows of educated young people (Group 5) (Figure 3.14).

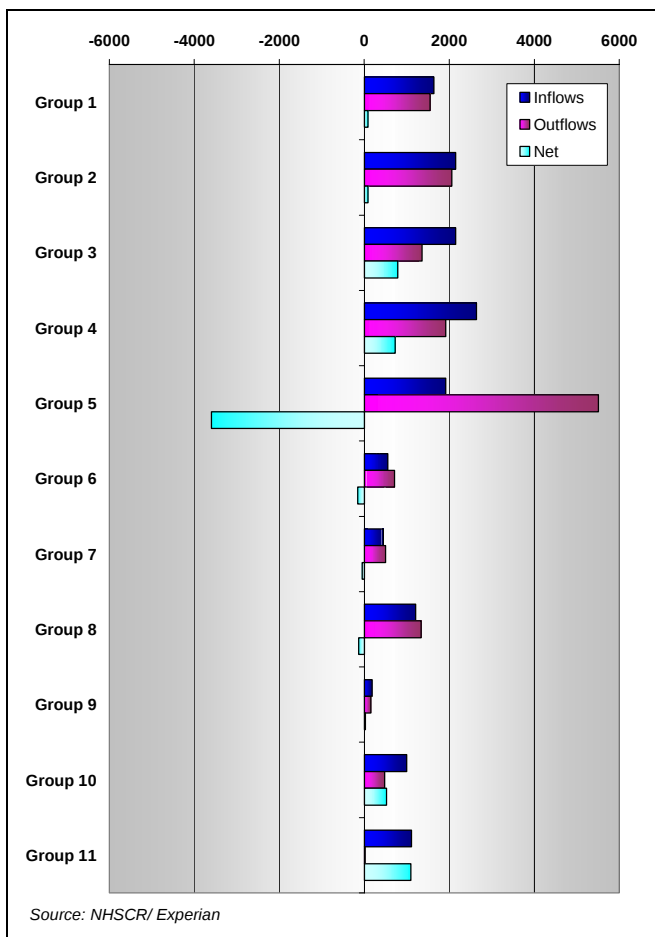


Figure 3.13 – Migration flows affecting Cardiff, 2005

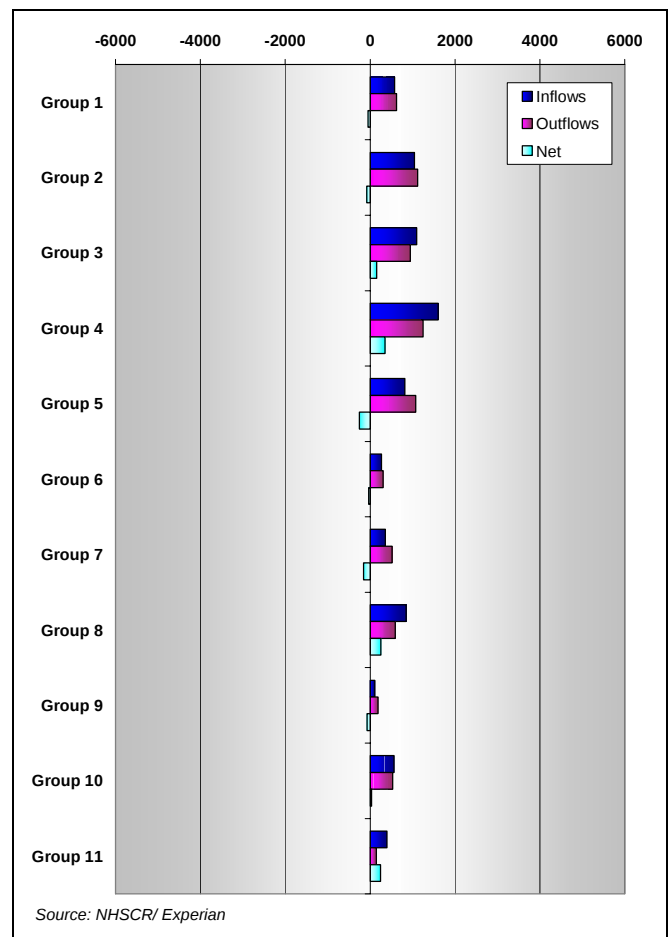


Figure 3.14 – Migration flows affecting Swansea, 2005

1 Career professionals living in sought after locations	7 Low income families living in estate based social housing
2 Younger families living in newer homes	8 Upwardly mobile families living in homes bought from social landlords
3 Older families living in suburbia	9 Older people living in social housing with high care needs
4 Close-knit, inner city and manufacturing town communities	10 Independent older people with relatively active lifestyles
5 Educated, young, single people living in areas of transient populations	11 People living in rural areas far from urbanisation
6 People living in social housing with uncertain employment in deprived areas	

4 Conclusion

In October 2006, Experian reported that Wales was receiving disproportionate inflows of people from relatively disadvantaged social groups. This was particularly true of those in Mosaic Group 6, classed as people living in social housing with uncertain employment in deprived areas. This report has found that whilst Wales does indeed seem to gain disproportionate inflows of this Group, the overall pattern of migration flows is complex, with Wales also gaining large inflows of career professionals and older families living in suburbia.

Wales is a popular destination for migrants from elsewhere in the UK, with almost all parts of the country receiving net inflows from the rest of the UK. The largest cities, Cardiff and Swansea, experience the largest **gross** migratory flows with the UK as a whole, whilst it is the districts of Powys and Carmarthenshire that make the greatest **net** gains. Significantly, net inflows of the working age population outweigh those of the pensionable age population, helping to off-set the natural aging of the population.

Migrants from disadvantaged groups are over-represented in migration flows to Wales and evidence from the Movers and NHSCR data suggests that Wales received net inflows of around 2,000 people classed as group 6 (*people living in social housing with uncertain employment in deprived areas*) in 2005. Further analysis of these sources suggests that North Wales (particularly Flintshire, Conwy and Wrexham), Carmarthenshire and Pembrokeshire are subject from a net gain of disadvantaged groups moving to Wales from the English regions, particularly the North West and West Midlands.

Whilst Wales continues to receive significant net inflows of disadvantaged groups, the country is also increasingly able to attract migrants from higher socio-economic groups. The largest proportion of inward migrants to Wales are in fact from Group 3 (*older families living in suburbia*) whilst Group 1 (*career professionals living in sought after locations*) are also over-represented.

Finally, this research considered migration patterns within Wales and has found some evidence that 'city flight' migration patterns are occurring, with Wales' two largest cities losing more migrants to their surrounding areas than they are gaining.

Appendix A

Mosaic Public Sector- Groups and Type Descriptions

Group	Description
1	Career professionals living in sought after locations
2	Younger families living in newer homes
3	Older families living in suburbia
4	Close-knit, inner city and manufacturing town communities
5	Educated, young, single people living in areas of transient populations
6	People living in social housing with uncertain employment in deprived areas
7	Low income families living in estate based social housing
8	Upwardly mobile families living in homes bought from social landlords
9	Older people living in social housing with high care needs
10	Independent older people with relatively active lifestyles
11	People living in rural areas far from urbanisation

Type	Description
A 01	Financially successful people living in smart flats in cosmopolitan inner city locations
A 02	Highly educated senior professionals, many working in the media, politics and law
A 03	Successful managers living in very large houses in outer suburban locations
A 04	Financially secure couples, many close to retirement, living in sought after suburbs
A 05	Senior professionals and managers living in the suburbs of major regional centres
A 06	Successful, high earning couples with new jobs in areas of growing high tech employment
A 07	Well paid executives living in individually designed homes in rural environments
B 08	Families and singles living in developments built since 2001
B 09	Well qualified couples typically starting a family on a recently built private estate
B 10	Financially better off families living in relatively spacious modern private estates
B 11	Dual income families on intermediate incomes living on modern estates
B 12	Middle income families with children living in estates of modern private homes
B 13	First generation owner occupiers, many with large amounts of consumer debt
B 14	Military personnel living in purpose built accommodation
C 15	Senior white collar workers many on the verge of a financially secure retirement
C 16	Low density private estates, now with self reliant couples approaching retirement
C 17	Small business proprietors living in low density estates in smaller communities
C 18	Inter war suburbs many with less strong cohesion than they originally had
C 19	Singles and childless couples increasingly taking over attractive older suburbs
C 20	Suburbs sought after by the more successful members of the Asian community
D 21	Mixed communities of urban residents living in well built early 20th century housing
D 22	Comfortably off manual workers living in spacious but inexpensive private houses
D 23	Owners of affordable terraces built to house 19th century heavy industrial workers
D 24	Low income families living in cramped Victorian terraced housing in inner city locations
D 25	Centres of small market towns and resorts containing many hostels and refuges
D 26	Communities of lowly paid factory workers, many of them of South Asian descent
D 27	Inner city terraces attracting second generation Londoners from diverse communities
E 28	Neighbourhoods with transient singles living in multiply occupied large old houses
E 29	Economically successful singles, many living in small inner London flats
E 30	Young professionals and their families who have 'gentrified' older terraces in inner London

E	31	Well educated singles and childless couples colonising inner areas of provincial cities
E	32	Singles and childless couples in small units in newly built private estates outside London
E	33	Older neighbourhoods increasingly taken over by short term student renters
E	34	Halls of residence and other buildings occupied mostly by students
F	35	Young people renting hard to let social housing often in disadvantaged inner city locations
F	36	High density social housing, mostly in inner London, with high levels of diversity
F	37	Young families living in upper floors of social housing, mostly in Scotland
F	38	Singles, childless couples and older people living in high rise social housing
F	39	Older people living in crowded apartments in high density social housing
F	40	Older tenements of small private flats often occupied by highly disadvantaged individuals
G	41	Families, many single parent, in deprived social housing on the edge of regional centres
G	42	Older people living in very large social housing estates on the outskirts of provincial cities
G	43	Older people, many in poor health from work in heavy industry, in low rise social housing
H	44	Manual workers, many close to retirement, in low rise houses in ex-manufacturing towns
H	45	Older couples, mostly in small towns, who now own houses once rented from the council
H	46	Residents in 1930s and 1950s London council estates, now mostly owner occupiers
H	47	Social housing, typically in 'new towns', with good job opportunities for the poorly qualified
I	48	Older people living in small council and housing association flats
I	49	Low income older couples renting low rise social housing in industrial regions
I	50	Older people receiving care in homes or sheltered accommodation
J	51	Very elderly people, many financially secure, living in privately owned retirement flats
J	52	Better off older people, singles and childless couples in developments of private flats
J	53	Financially secure and physically active older people, many retired to semi rural locations
J	54	Older couples, independent but on limited incomes, living in bungalows by the sea
J	55	Older people preferring to live in familiar surroundings in small market towns
J	56	Neighbourhoods with retired people and transient singles working in the holiday industry
K	57	Communities of retired people and second homers in areas of high environmental quality
K	58	Well off commuters and retired people living in attractive country villages
K	59	Country people living in still agriculturally active villages, mostly in lowland locations
K	60	Smallholders and self employed farmers, living beyond the reach of urban commuters
K	61	Low income farmers struggling on thin soils in isolated upland locations

The views expressed in this report are those of the authors and do not necessarily reflect the opinions of the Welsh Assembly Government.