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No one left behind

A forward-thinking approach to improving health and well-being for all in Wales through stronger social connections

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Contents

Purpose	4
Introduction	6
Social capital and health inequalities	6
Different types of social capital	6
Why should we consider the impact of future trends on social capital?	7
Considering the future of social capital	9
Demographic change	11
Trends and projections to watch	11
Impact of demographic changes on social capital	13
How could these trends impact people's lives?	15
Implications for inequalities	16
Policy responses	17
Technological revolution	18
Trends and projections to watch	18
Impact of the technological revolution on social capital	20
How could these trends impact people's lives?	22
Implication for inequalities	23
Policy responses	24
The Future of Work	25
Trends and projections to watch	25
Impact of the future of work on social capital	28
How could these trends impact people's lives?	30
Implication for inequalities	31
Policy responses	32



Culture, democracy and civic participation	34
Trends and projections to watch	34
Impact of culture, democracy and civic participation trends on social capital	36
How could these trends impact people’s lives?	37
Implications for inequalities	38
Policy responses	39
Conclusion	40
Appendix	41
Our approach	41

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Authors

Menna Thomas, Sara Elias, Petranka Malcheva, Louisa Petchey, Jo Peden

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Purpose

Our social connections play a vital role in shaping our health and well-being and can contribute to why some of us experience poorer health outcomes than others (health inequalities).¹ Those of us with larger social networks and stronger social connections tend to have better health outcomes, lower rates of chronic disease, and longer life expectancy. In contrast, those who are socially isolated or have weaker social connections may experience a range of negative health outcomes, including mental health disorders, cardiovascular disease, and premature mortality.² Communities, and the social connections that form them, have a vital role in reducing health inequalities.^{3 4}

Social connections are central to interconnected elements of 'well-being capitals' including trust, social cohesion and participation. Well-being capitals, as defined by the World Health Organisation, also include our environment, equity and people's well-being. All these assets are linked and are mutually reinforcing.⁵

This piece of work focuses on the **potential impacts of future trends on our social connectedness and community networks (our 'social capital')** over the next fifty years. It aims to explore some of the factors which may **support and strengthen social participation and networks** in Welsh communities, as a central feature of a healthy and flourishing society, and those which may risk alienating, polarising and isolating individuals and groups. This report does not aim to predict the future but rather to prompt people to think about the long-term challenges, opportunities, and possibilities that future trends can present.

We will be viewing social capital through the lens of 'communities of place', defined in statutory guidance 'A More Equal Wales: The Socio-Economic Duty Equality Act 2010' as 'those who share a geographical location, for example where people live, work or spend a substantial part of their time.'⁶ These factors will precipitate or inhibit the relationships which underpin community cohesion, participation and individual well-being. The relationship between individual well-being and community well-being is illustrated by the [Conceptual Framework for Mental Well-being](#) designed by Public Health Wales.

We hope that this will help community leaders, and those seeking to work with communities to improve social connectedness, in planning for the future challenges and opportunities their work may face.

Key points

- Our **relationships** with other people and communities (our social capital) impact and are impacted by a multitude of trends, which have implications for our well-being now and in the future.
- Our **population is changing**. We are living longer, having fewer babies and are experiencing more liberal family attitudes and more diverse communities. In the future, we are likely to have a much older population, a higher demand for health and social care, and heavily rely on migration to maintain or grow population levels.
- Our **climate and relationship with nature and biodiversity** is changing. At its core, climate change and biodiversity loss are both a symptom and a cause for our declining social connections and community cohesion. We need to strengthen our relationships with people, communities and the planet.
- We are living in an **increasingly digital world**. This brings with it a plethora of opportunities for improving our health and erasing geographical distance between people, but it also carries risks for our real-world connections and links to family, friends and our immediate community.
- Our **work lives are changing**. Technological advances enable some of us to now work more flexibly and have a shorter working week. This means we can spend more time increasing our bonding and bridging capital with family, friends, and within our community. However, we must ensure everyone can access these improved conditions and no one is left behind.
- Our **trust in government and institutions is declining**. We are becoming more polarised as a society with social media enabling this. There are opportunities to improve democratic engagement through technology but, if not done well, this could also lead to further deterioration of trust.

Social Capital and Health Inequalities

Our relationships and participation in social networks – our ‘social capital’ – has implications for our well-being and the well-being of the communities and societies we live in. Those of us with larger social networks and stronger social connections tend to have better health outcomes, lower rates of chronic disease, and longer life expectancy⁴. In contrast, those who are socially isolated or have weaker social connections may experience a range of negative health outcomes, including mental health disorders, cardiovascular disease, and premature mortality.⁷ This makes (a lack of) social connectivity a potentially important driver of unfair and avoidable differences in people’s health outcomes (health inequalities). Creating the conditions whereby individuals and communities can become more empowered and have more control over their circumstances increases the potential for positive individual and community well-being.⁸

Different types of social capital

This section will explore the different types of social capital.

Social capital includes different levels of social relationships: individual bonds with family, friends, clubs and groups, the bridges that link us to communities of work colleagues or wider interest groups where we get new ideas and information: and the links we have with those in power to influence change. All of these relationships have an influence on community level social capital.⁹



‘Bonding’ capital describes the relationships with friends and relatives that we can turn to when we need support and to feel close to someone¹⁰. This can also refer to a location such as a village or geographically located community where people interact regularly and develop a sense of belonging.¹¹



'Bridging' capital describes looser links between different groups of outward looking people featuring more diversity and inclusion.¹² This wider network of connections allows us to mix with more diverse groups of people and promotes tolerance. It enables access to wider resources and information, and exchanges of ideas, opportunities, and innovations.¹³



A third, **'linking' capital**, is an extension of 'bridging' capital and involves 'vertical' connections across boundaries of power or social position such as links between small community-based organisations with government or funding bodies, which enables access to influence or resources beyond the immediate network.¹⁴

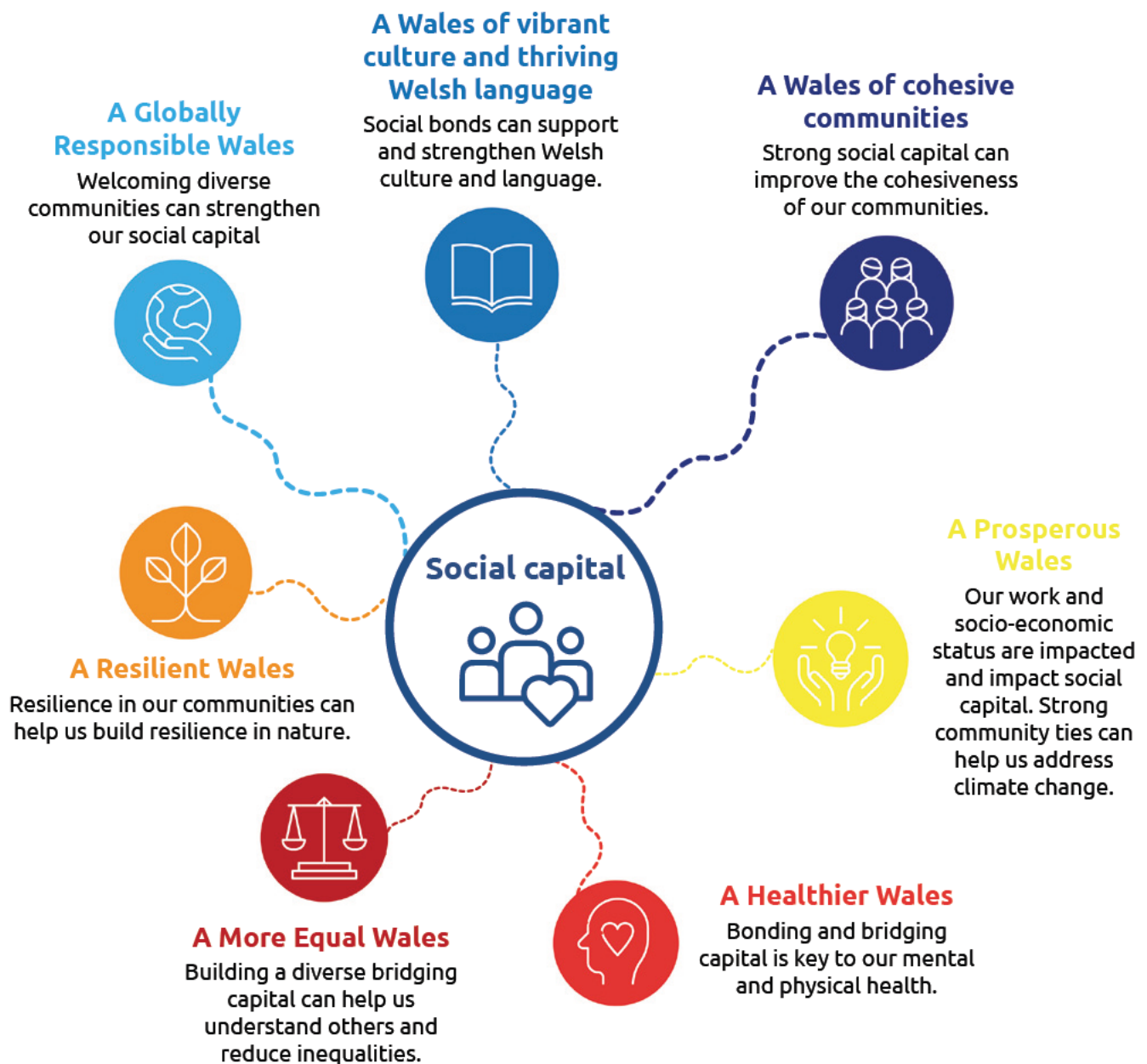
As with any type of capital, social capital of any description can be used in negative ways and have negative consequences. The closed, inward looking features of bonding capital, for example, can lead to the exclusion of outsiders, or low tolerance of others within the group if they challenge the group's culture.¹⁵

Why should we consider the impact of future trends on social capital?

The Well-being of Future Generations Act (2015) requires and inspires us in Wales to take a long-term, sustainable approach to our work. Thinking long-term about the impacts our decisions today have on the future can help us avoid sleepwalking into unintended consequences and making decisions today that we have to undo tomorrow. Through thinking about the future, we can build resilience into our systems and plans, as well as gain agency in shaping and working towards a future we want to be a part of.

Every five years, coinciding with each new Senedd term, Welsh Government produces a Future Trends report which identifies unfolding changes, challenges and opportunities, and their potential impact on our lives. It includes trends such as advances in technology and changes to our population, climate, and political landscape.¹⁶

When talking about social capital, we can consider how these future trends may influence the type and quality of connections that we are able to make with those around us. The way social capital and health inequalities interact with future trends is complex and dynamic. For example, changes in technology, population, and globalisation can enhance or erode social connections, depending on how they are implemented and experienced by different groups, and how that may change over time. In Wales our measurement framework, covering the various well-being capitals, means we are well placed to build an evidence base to help inform the design of well-being economy policies.¹⁷ Actively considering and preparing for the potential impacts of future trends on social capital is important because it allows us to make better decisions about policies and services, which build social capital in a way that supports a healthier and more equal Wales with cohesive communities and vibrant culture.

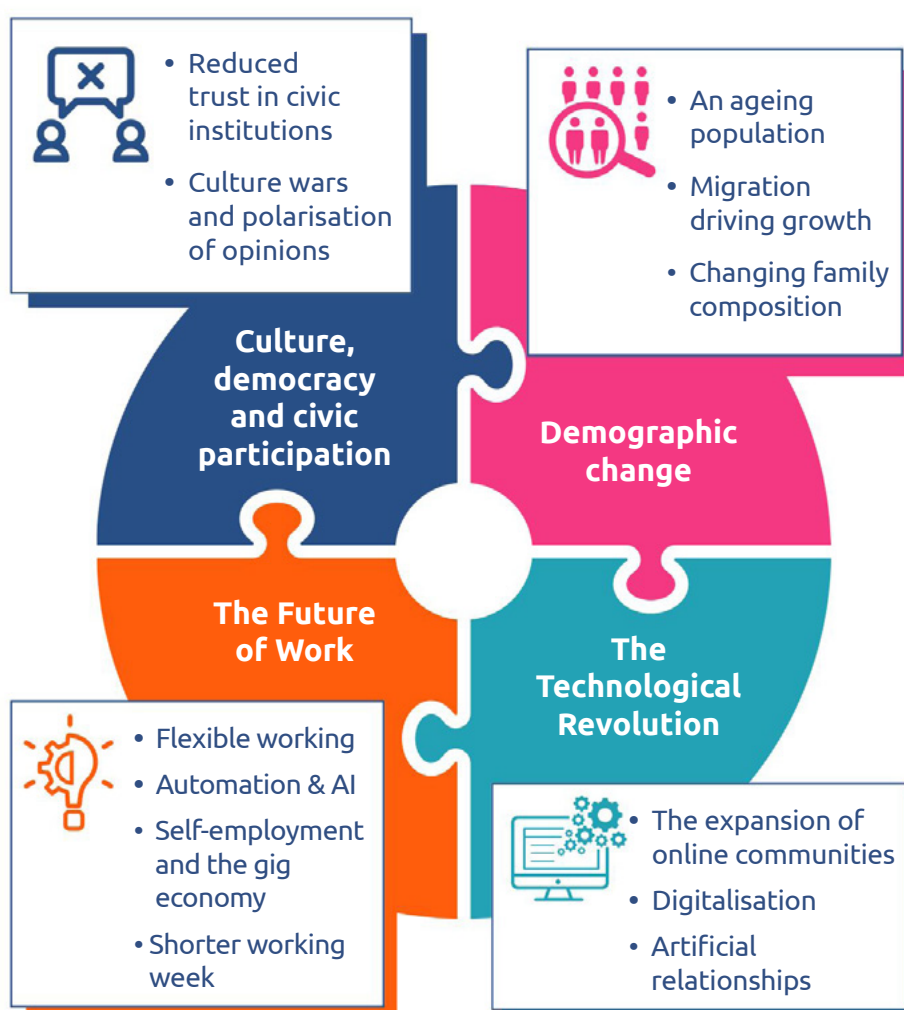


We have made the conscious decision not to include a section on climate change and biodiversity loss because of the circular way in which this is interconnected with social capital. At its core, climate change and biodiversity loss are both a symptom and a cause for the centuries-long trend in declining social connection and community cohesion.¹⁸ While climate change and biodiversity loss are likely to negatively impact social capital, they provide little opportunity to build it up. Rather, it is the other way around, and to respond adequately to the long-term climate and biodiversity challenges, we would need to strengthen social capital and build resilient links between people, communities and nature.

Aside from impacting social capital and health inequalities, these trends also impact each other. How they affect our future should be considered in an integrated way, ideally by bringing together partners from different organisations to collaborate and envision the future.

Considering the future of social capital

This section will consider the future of social capital under **four** key themes. The trends and drivers that shape social capital within each theme will be considered, as well as some suggestions about how these can impact (in a positive or negative manner) the future of social capital in Wales.



We have set out each subsection in a similar way:

- A list of trends and possible projections which could impact the future of social capital.
- A set of potential impacts, in the form of stories, demonstrating how these trends could impact on people's lives. To do this, we have used the characters developed in the joint project between Public Health Wales and the Future Generations Commissioner – [Communities and Climate Change](#).
- A suggested set of policy responses which could help us prepare for these trends and mitigate or prevent their negative impacts.



Demographic change

Trends and projections to watch

An ageing population

- People aged 65 and older make up over a fifth of the population in Wales in mid-2021, the highest proportion of all UK countries. It is expected that 1 in 5 people in Wales will be aged 70 and over by 2038.¹⁹ **Over the next 15 years the size of the UK population aged 85 years and over is projected to increase from 1.6 million to 2.6 million.**²⁰
- People are living longer but not necessarily in good health. Older people in Wales are ranked third of the four UK nations in relation to healthy life expectancy at age 60, which is, in part, linked to risk of poverty,²¹ levels of social connectivity and civic freedoms.²² **Ageing will increase levels of ill-health and disability. In England this is projected to increase by over a third by 2040.**²³
- The number of unpaid carers is increasing, many of whom are older people (45 and above).²⁴ **In Wales, this is estimated to exceed half a million by 2037.**²⁵



Migration and population growth



- Birthrates in Wales continue to drop with the number of children born per woman at an all-time low.²⁶ Factors, such as increased obesity, sexually transmitted infection, and environmental pollution, have been linked to lower fertility.²⁷ Financial concerns may also mean that people are delaying or deciding not to have children.²⁸ **The fertility rate in England and Wales has decreased to 1.49 children per woman in 2022 from 1.91 children in 2010.**²⁹
- Net migration is driving population growth. The projected growth in the population between mid-2021 and mid-2031 is driven by migration with total net migration of 250,000.³⁰ **It is expected that there will be a consistent amount of international migration to Wales until 2031.**³¹








Changing family composition

- Increasingly liberal attitudes to sex, relationships and family life over time have contributed to changing demographics.^{32 33}
- Families in the UK are more fragile than their European counterparts with divorce or separation at 12.5% compared to a 10% EU average.³⁴ **Both OECD and Welsh projections suggest an increase in single-person households.**^{35 36}
- Multi-generational households have been the fastest growing type of household in the UK between 1999 to 2019.³⁷ More young people are living in the family home, or with grandparents, for longer, out of preference or necessity.^{38 39} While in some cases this could mean overcrowding, which can contribute to the spread of infection⁴⁰, in others, this could provide increased financial security and resources for childcare and elder care.⁴¹



Impact of demographic changes on social capital

Trend	Potential futures	Potential future increases in social capital	Potential future decreases in social capital
<p>Population ageing</p>	<p>The number of dependent adults aged over 65 will outnumber dependent children.</p>	<p>Older people volunteer and are more civically engaged.⁴² Healthy people have longer working lives.</p> <p>This will keep working older people out in the world making links across social groups and geographies, and can reap well-being benefits for individuals and for the communities they live and work in.</p> <p> This could mean more opportunities for bridging and linking capital which can bring resources into communities from external sources.</p> <p>Older people make up the largest proportion of carers,⁴³ which in supportive families, with enough resources, could be good for individual and family well-being. Older relatives caring for children and grandchildren, could benefit well-being and support children's development (bonding capital). Parents in these families may find they are able to engage more fully in bridging capital activities in their local communities.</p>	<p> The bonding capital that builds when one cares for family members can be limiting, and bad for well-being if the burden of care is too big.⁴⁴</p> <p>This could increase health inequalities between families with access to more resources and those with less, and further isolate people from others in their community, limiting opportunities for bridging capital.</p>

Trend	Potential futures	Potential future increases in social capital	Potential future decreases in social capital
<p>Migration is driving population growth</p>	<p>In future population growth will be fuelled by migration making for more diverse communities.</p>	<p>An increase in migrants settling and having families can contribute to community cohesion.⁴⁵</p> <p> Bonding capital and bridging capital could comfortably side by side in some diverse communities.</p> <p></p>	<p>During times of economic austerity, competition for scant resources can fuel anti-immigration feeling in deprived communities driving people into polarised groups.⁴⁶ (bonding capital).</p> <p></p>
<p>Family composition – changes including a rise in cohabiting and blended families and same sex families</p>	<p>In future there are likely to be more single person and single parent households as well as a rise in multi-generational households.</p>	<p>Advantages to multi-generational living include increased financial security and more resources available for childcare and elder care,⁴⁷ both of which can create the opportunity for social participation outside the home. This mode of living has the potential to contribute to both positive bonding and bridging capital.</p> <p> </p>	<p>For poorer families forced into multi-generational living for economic reasons, risks include overcrowding and strained relationships (reduced bonding capital).</p> <p></p> <p>Smaller families where older generations live for longer make for more 'vertical' family structures. Competing demands between employment and care commitments may mean less time for social engagement outside work and family life leading to fewer opportunities to build their bridging capital.⁴⁸</p> <p></p>





Using the characters of Leslie and Moana from the **Communities and Climate Change in a Future Wales** futures literacy toolkit, the following stories demonstrate how their lives and relationships might be impacted by future migration and demographic changes.

Leslie is in her late 60s and has mobility issues. She is now living with her younger daughter and her family, which has helped settle Leslie's financial worries, and she has stopped working and no longer needs a job. She is helping care for her grandchildren, which allows her daughter and son-in-law more time to work and go out with friends.

Being near her family and grandchildren is helping Leslie feel more useful and keeps her active. Her mental health is improving and she is feeling more connected to people.

As her daughter is living in the middle of a more diverse community with an intergenerational community hub nearby, Leslie has now made friends with several of her neighbours, including Moana, who has moved to Wales from Africa with her three children.

Moana, on the other hand, is having a hard time settling in Wales. Since coming here, she is suffering with multiple skin conditions, which means she is unable to work. Her three children all live in the same house as her as they can't afford to move out – not many people are willing to give immigrants a chance at a good job.

Moana is having to rely on her children to help support her financially, but also care for her when her conditions flare up. This is creating a strain in their relationship, and they argue all the time. Moana feels her children no longer want to talk to her and leave the room when she enters. She wants to give them space but there are only so many rooms in the house.

She has started visiting her neighbour, Leslie, who just moved in next door with her daughter. They don't seem to be fighting all the time even though they are all living together. Moana wonders how she can change things and be close with her children again?



Implications for health inequalities

The issue of the changes to family composition described above, together with a growing elderly population, may mean more people who are single by choice or through relationship breakdown, will result in an increase in levels of poverty across the life course.⁴⁹ If the trend for smaller more 'vertical' families is realised then this means fewer family members to care for dependents, which will place greater financial pressure on families, leading to further inequalities.

Technical advances such as the ability to work from home, which can help balance work and care responsibilities and increase autonomy for elderly and disabled people, may help mitigate this to a degree.⁵⁰

Policy responses

Immigration and asylum are policy areas reserved to the UK government, though Welsh government has a role in delivering elements of the policy. Changes in demography, migration and family structures happen slowly over time and will require adaptable policy responses, shaped by a wide range of stakeholders, to drive social inclusion and promote thriving, vibrant localities which attract people in. Key areas include:

Social inclusion – Creating opportunities for engaging the local population in taking an active part in all aspects of local community life facilitates the development of empowerment and trust and can encourage people to stay, and invest in their communities.⁵¹ The Socio-economic Duty and The Public Sector Equality Duty are examples of levers to support inclusion in area plans, whilst the Well-being of Future Generations (Wales) Act 2015 includes the goal of a ‘A Wales of Cohesive Communities’.

Prioritise local living conditions – Investing in a mix of good quality private and social housing and improving local green/blue space, transport and infrastructure makes a locality an attractive place to live, promotes health and has a better chance of attracting a diverse population.^{52 53}

Local employment programme initiatives – such as the foundational economy, can activate hidden reserves in the local labour market and represents a ‘shift towards a focus on place and making communities stronger and more resilient’.⁵⁴ This can reduce the impact of a reduced workforce due to ageing.⁵⁵

Active ageing – tackle ageism in the workplace, promote employability through equal access to training and development and encourage employer and human resources departments to adapt to the needs of an ageing population. The Welsh Government’s Strategy, Age Friendly Wales supports the delivery of such an approach and [guidance](#) is available for employers on employing and training older people.

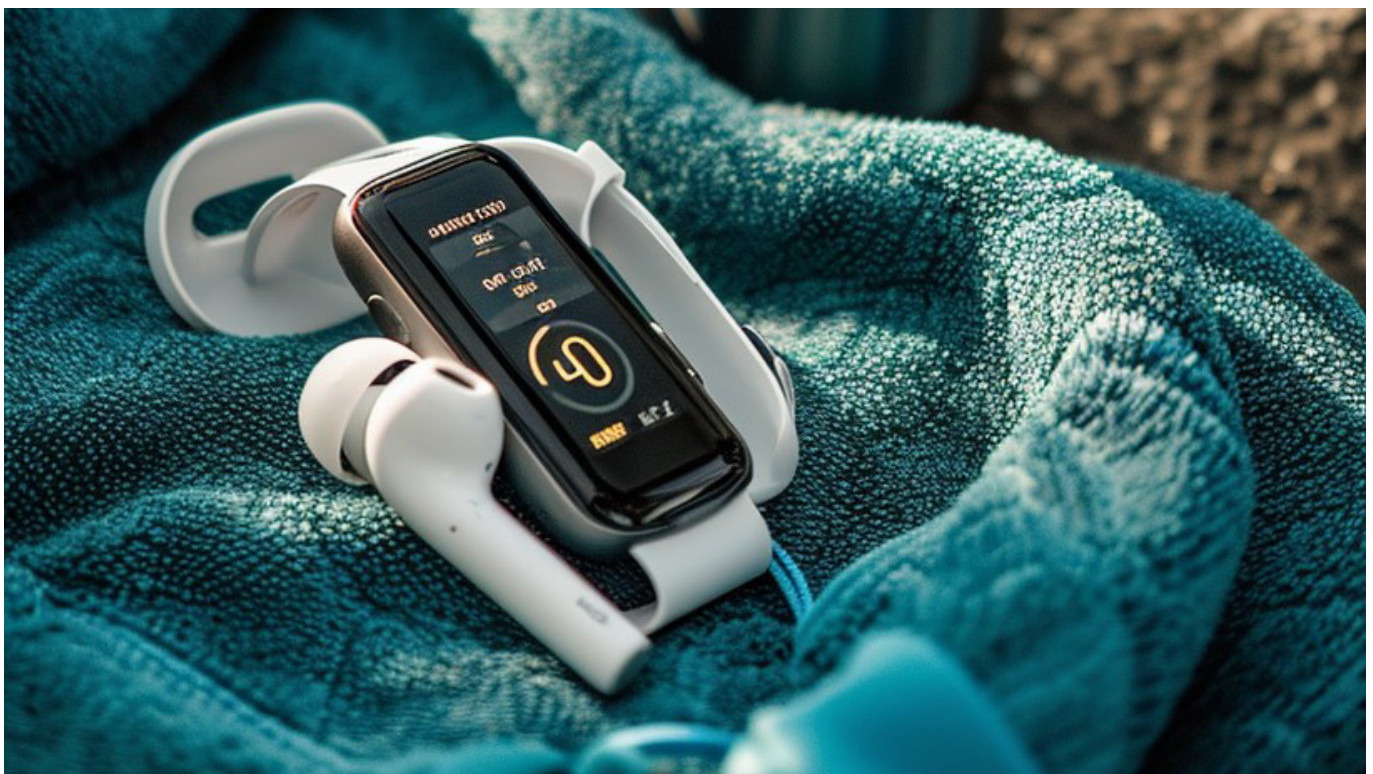
A focus on people – their creativity, vibrant cultures and the richness this brings to the lives of individuals and communities.⁵⁶

Technological revolution

Trends and projections to watch

Increasing digitalisation

- Of those who use the internet 92% say they use the internet several times a day – an increase from 76% in 2019-20.⁵⁷
- Two thirds of people in Wales have used digital technology to support their health (through things like step counting, fitness and nutritional intake)⁵⁸, and a third of people have used it to monitor their health (through finding health information, self-diagnosing, and managing a long-term condition).⁵⁹
Digital tools can improve health equity and transform health systems by expanding access to affordable healthcare and addressing unmet needs.⁶⁰
- Ofcom's 2023 report found that participants' use of the internet is becoming increasingly personalised, with a growing role for specialist apps and websites in supporting their daily life.⁶¹ **As technologies continue to mature, and web personalisation increases, it is incumbent on technology leaders to navigate the intricate balance between innovation and privacy.**⁶²
- Ofcom reported in 2023 that 44% adults chose their smartphone as the device they would most miss if it was taken away from them.⁶³ **The future of smartphones is unclear and in 10 years we could have something completely different – from smart glasses, to ambient computing all around us.**⁶⁴

















Expansion of online communities




- In Wales 8 in 10 people use social media⁶⁵, which varies with age: 99.6% of 16–29-year-olds, 75.6% of 60–69-year-olds, and 59.8% of 70+ year olds with internet access using one or more type of social media platform.⁶⁶
- YouTube was the only social media platform to have a net positive impact on health and well-being for young people in the UK.⁶⁷
- Cyber bullying is a growing problem with 7 in 10 young people saying they have experienced it.⁶⁸
- We are engaging less with our neighbours but more with social media.⁶⁹
Online communities could prove to be an avenue for reconnecting geographically separated communities and digitalising nations threatened by climate change.⁷⁰
- Gaming is an avenue of online social connection. Approximately 68% of those who play games do so online, with 43% of them saying they play with someone they know, and 26% saying they play against multiple people whom they know.⁷¹

Artificial relationships

- In the midst of the various uses of AI, a new use for it has been discovered in the form of AI companions - chatbots who replicate relationships.⁷² **Replacing human connections with synthetic AI relationships could break nuclear familial bonds and weaken communities.**⁷³

Impact of the Technological Revolution on social capital

Trend	Potential futures	Potential future increases in social capital	Potential future decreases in social capital
Online communities have expanded	Online communities continue to grow and new entities, such as 'digitalised nations' emerge.	<p> Social media provides opportunities for people to make social connections online which can build bonding and bridging capital.⁷⁴</p> <p> Geographically separated communities, like refugees and immigrants, are able to preserve their connections, cohesion and cultures through the increased use of online communities (bonding and bridging).</p> <p> </p>	<p> Harmful online content draws people into groups which harm well-being, exploit or pull them into crime (bonding capital).</p> <p> Online communities strengthen the identities of separate social groups and push them into conflict (bonding and bridging).^{75 76}</p> <p></p>
Our lives are becoming increasingly digitalised	As technology continues to advance exponentially, this will become an even greater part of our lives, changing the way we interact with the world and others.	<p> Using digital technology to shop, bank, manage utility bills, etc, frees up time for care and support, and social activity (bonding and bridging capital).</p> <p> Using digital technology to manage and monitor health, particularly for the elderly, and those with chronic conditions and disabilities provides autonomy and keeps people out of hospital and institutional care. This enables them to maintain personal autonomy and social connections for longer and relieve the burden of care for relatives and close friends (bonding and bridging capital).</p> <p> </p> <p> Advanced technology is used to connect with friends and relatives across geographies (bonding).</p>	<p> Embracing digital approaches means less of the face-to-face interaction that is good for mental health in communities, work and other aspects of people's lives (bonding and bridging capital).</p> <p></p>

Trend	Potential futures	Potential future increases in social capital	Potential future decreases in social capital
Artificial relationships	<p>There is a rise in AI dating and friendship apps.</p>	<p>AI companions are used to help people at risk of social isolation.</p> <p>They supplement real-world relationships and help people gain confidence in their social skills. It is used to help stimulate relationships with friends, family and the wider community.⁷⁷</p> <p> This is especially useful for people who find it difficult to form social connections (bonding and bridging).</p> <p></p>	<p>AI companions replace real-world relationships with people interacting more with their artificial friends and partners than with their family and community (bonding).</p> <p></p>



Using the characters of Angella and Goke from the **Communities and Climate Change in a Future Wales** futures literacy toolkit, the following stories demonstrate how their lives and relationships might be impacted by future technological changes.

Digital technology is making life easier for Angella. She can talk almost daily with her friends back in Uganda, which helps her feel connected to her roots and family despite the distance.

She has recently joined an online group of Ugandan immigrants in Wales, where she can share her experience and ask for help when she doesn't know something. This gives Angella a sense of community.

Connecting with people online is also helping her gain confidence and start making friends with the people in her construction crew. She is grabbing coffee with one of her colleagues soon.

Goke spends most of his free time online. He no longer has to go into work in Cwmbran as he works from home now. Goke plays online games in his spare time and, most recently, has become friends with an AI companion. The AI companion is the only one that understands Goke and supports him, although it sometimes asks some very personal questions that Goke doesn't feel comfortable sharing.

This is helping him feel less anxious and lonely, but he hasn't really spoken with his mum and sister in the last week because they are part of the anti-AI lobby and keep trying to make him delete his accounts and stop spending so much time online. They are really bothering him and he would much rather spend his time with his AI companion.



Implications for inequalities

Given the central and increasing importance of being able to access and use current, new, and developing technologies across many aspects of life means that addressing digital inequality is a priority. Recent research by Public Health Wales found that digital exclusion, whether through lack of access, skills, or motivation, mainly affects older people, those living in rural areas and those with low incomes.⁷⁸

Research suggests that digital inequalities largely reflect, and can exacerbate, existing social inequalities⁷⁹ and that inequalities arise from three factors; availability of access to the internet, having access to hardware, software and devices and adequate skills and motivations to make good use of digital opportunities.⁸⁰

Policy responses

In future digital access will be fundamental for all and will enhance access to information, improve healthcare and enrich education. However, the challenges are of digital divides, the segregation of people into exclusive groups, work/life imbalances and mental health related issues including cyber-bullying and screen addiction.⁸¹

In Wales the Digital Strategy sets out to address some of the key challenges outlined including, reducing digital divides, promoting digital skills across the life course and designing person centred public services.⁸²

Equitable access relies on the safety of online spaces, maximising their capacity for social connection, networking and contributing to accessing information and learning which can contribute to addressing health inequalities. The regulation of online spaces to make them safer for people to engage in, is central in addressing cyber-bullying, exploitation, scamming and exposure to harmful content such as children accessing pornography.

The Online Safety Act 2023 requires businesses and anyone operating online services to take action to keep people (especially children) safe from illegal and harmful content. Duties will start to be phased in from the end of 2024.⁸³

Other issues for policy consideration include, for example, children's exposure to algorithm driven content, which has been shown to be directly associated with social and cognitive outcomes in early childhood and, in counter-balance, the role of support with family media literacy to harness technology's potential for learning and communication.⁸⁴

Increasing broad, inclusive civic engagement through digital government strategies will also be important to develop social capital.⁸⁵



The Future of Work

Trends and projections to watch

Flexible work

- Flexible work accounts for 23% of the workforce across Britain, with Wales having good access to time flexibility, but less place of work flexibility than Scotland or England.⁸⁶ **This is expected to increase in future with Welsh Government's target of 30% of people remote working.**⁸⁷
- In the UK, 58% of workers report preferring to work in a hybrid model.⁸⁸ **More agile working could improve access to employment opportunities for older people, those with disabilities and those with caring responsibilities.**⁸⁹
- During lockdown, 84% of low qualified workers worked outside the home, with only a 5% increase in homeworking, compared to a rise from 8% to 59.2% for graduates.⁹⁰
- A Microsoft study suggests working from home is bad for communication between teams, but employees had more contact and stronger connections with their immediate team.⁹¹
- Working from home can give people more autonomy, better work/life balance, more time for family and physical exercise. However, it increases the risk to mental health issues for some people due to social isolation, disconnectedness, and burnout.^{92 93}
- Younger employees (35 and under) are more concerned about social isolation and missing career opportunities due to not being in the office.⁹⁴



Automation and Artificial Intelligence

- The proportion of jobs at high risk of automation in Wales by the early 2030's varies from 26% to 36% with areas potentially most at risk of automation impacting the workforce being those in the economic heartlands of the North and South.⁹⁵
- Of the top four employment sectors in Wales, wholesale/retail and manufacturing are the most automatable, with over 40% of jobs at risk by the early 2030's.⁹⁶
- Employees with higher level qualifications are more likely to be in jobs with high exposure to AI; the most exposed being associated with clerical work and across the finance, law, business and management sectors.⁹⁷ **AI can augment (aid) or replace (substitute) jobs; most jobs are more likely to be augmented than replaced.**⁹⁸
- Of 2,778 AI researchers that were surveyed rated the chance of AI outperforming humans in every task at 50% by 2047 – 13 years sooner than last year's estimate.⁹⁹
- Some argue that the Fourth Industrial Revolution will create more jobs than are likely to be lost to automation.¹⁰⁰
- As the scope of AI expands, risks grow too: of unequal access, bias and prejudice, malign applications and environmental impacts.¹⁰¹

Self-employment and gig economy








- As of 2021, self-employed workers made up 12% of the workforce in England and Wales.¹⁰²
- Estimates of the size of the UK gig economy suggest it numbers around half a million people (1.4% of the UK workforce). Estimates for Wales are the lowest in the UK at 0.8%.¹⁰³ **Globally the gig market is growing, driven by demand in developing countries, and is anticipated to continue to grow in future.**¹⁰⁴
- Recent research with gig economy workers found that 52% of participants earned below the minimum wage.¹⁰⁵
- Ethnic minority workers in the gig economy (24%) are more likely to say it is their main source of income than those with a white ethnic background (19%).¹⁰⁶

Shorter working week

- There has been rising interest in the idea of a four-day working week partly as a result of trials in the UK, involving 70 companies experimenting with reducing working hours for staff without reducing pay.¹⁰⁷ **Over a third of employers surveyed (34%) think the four-day working week will become a reality in the UK for most workers within the next 10 years.**¹⁰⁸
- Looking back, 10% of 2000 organisations surveyed report they have reduced working hours without reducing pay for the whole or a significant part of their workforce over the last five years. Of these, 42% did so as a result of the furlough scheme.¹⁰⁹
- Research found that of 31% of workers saying they would like to work fewer hours, only 11% were willing to take a pay cut to achieve this.¹¹⁰
- Research found that 61% of workers of employers believe that a shift to a four-day week without reducing pay depends on the organisation improving efficiency and working smarter or boosting adoption of technology.¹¹¹
- A shorter working week has been shown to reduce tiredness and stress¹¹², help people juggle complex caring needs and spend less time distracted by personal tasks at work.¹¹³

Impact of the future of work on social capital

Trend	Potential futures	Potential future increases in social capital	Potential future decreases in social capital
<p>Flexible and hybrid working has increased, particularly since the pandemic.¹¹⁴</p>	<p>Flexible and hybrid working is here to stay and will continue to establish across a range of workplaces.</p>	<p>This supports improved work/life balance and allows those with caring responsibilities to access work (bonding and bridging capital).</p> <p>New approaches to collaborative working, including collaborative working spaces, support bridging capital at work.</p>	<p>More risk of social isolation for those living alone and potential to limit access to opportunities for promotion and career development (bridging capital).</p> <p>Atomised workforces and depleted social work environments increase, undermining bonding and bridging capital.</p>
<p>Automation and AI are changing the world of work</p>	<p>Automation is projected to affect work in the economic heartlands of Wales over the next 5 years and AI will change work across a range of professional sectors in the future.</p>	<p>Innovations in the way work happens lead to time-saving, which supports better work/life balance, well-being and improved social contact, supporting bridging capital.</p>	<p>This leads to job losses, unemployment and disruption of social networks and communities, especially in manufacturing, wholesale, retail and health and social care (bonding and bridging capital).</p>

Trend	Potential futures	Potential future increases in social capital	Potential future decreases in social capital
<p>Self-employment and the gig economy</p>	<p>Globally the gig economy is growing and projected to continue to grow.</p>	<p>This provides autonomy and flexibility which can facilitate better work/life balance for many (bridging capital).</p> 	<p>Ethnic minorities and those with disabilities continue to be over represented in this economy due to the inaccessibility of work in the mainstream economy, which undermines social cohesion (bridging capital).</p> 
<p>Shorter working week</p>	<p>A 4-day week is the norm across Wales.</p>	<p>People have more time to spend with their family and friends, and within their community. There is more volunteering as people want to help the community in their free time (bonding and bridging).</p>   <p>People have more time to engage in local decision-making and are more involved in what is happening around them (linking).</p> 	<p>People who do not have a supportive family or community around them find the increased free time a burden as they feel more isolated from work and their colleagues (bonding).</p>  <p>Not everyone is able to work from home leading to animosity between groups of people that can and those who cannot (bridging).</p> 



Using the characters of Grannyjan and James from the [Communities and Climate Change in a Future Wales](#) futures literacy toolkit, the following stories demonstrate how their lives and relationships might be impacted by technological changes in work and workplace design.

Grannyjan is a storyteller and a therapist, working for herself. Online working has really made her life easier as she can meet with clients online and share her stories with more people.

She is not worried about finances and has recently made the decision to work less and enjoy life more, helping take care of her grandchild and volunteering in the community garden nearby.

She also has time to be involved in a community group trying to set up a collaborative working hub in the former Council building in the centre of town.

All of this is helping Grannyjan feel optimistic about the future.

James is finding it hard to connect with his friends nowadays. Most of them work from home and have different schedules to him so he is usually unable to meet up with them for drinks.

He is happy for them, really, but he is also frustrated at how some people break their backs while others have it all, only having to work 4-days-a-week from the comfort of their homes?

And now he might even lose his job – the company is laying off so many people because of these new machines they have bought that can do almost anything that James can. He would be in deep trouble then. He prefers not to think about the future.



Implications for inequalities

Digital exclusion, digital literacy and lack of adequate digital infrastructure can be barriers to hybrid and home working. Some people who are living alone or younger people working remotely may experience social isolation. Higher skilled and higher paid workers will primarily experience the benefits of remote homeworking.¹¹⁵

Increased automation and the use of AI in the workplace will not affect everyone equally. Projections suggest that AI will boost jobs, not only in high tech areas, but in health and social care where AI applications will augment and complement human labour.¹¹⁶ Roles that are likely to be substituted by AI include clerical, manual and process orientated occupations which are often occupied by employees with lower level qualifications.¹¹⁷ The most automatable sectors in Wales (wholesale, retail and manufacturing) also include many lower paid employees.¹¹⁸

More than half of people working in the gig economy report earning below the minimum wage with higher proportions of ethnic minority and disabled workers saying this is their only source of income.¹¹⁹

These factors point to the risk of ongoing technological and work pattern changes exacerbating inequalities in the future.

Policy responses

The impact of technological changes and working pattern changes, as outlined above, are issues already affecting employee experience and management concerns. Whilst technology and work design have the potential to improve employee experience and work productivity, poor technology and work design has been shown to impact negatively on employee health.¹²⁰ Experiencing work related stress can impact negatively on a person's mental health and relationships. A Public Health Wales guide to 'fair work, health well-being and equity'¹²¹ laid out the following areas that are impacted by the way work is organised and delivered (work design):

The six areas of workplace design that can affect stress levels⁵⁰



The principle of Fair Work '*where workers are fairly rewarded, heard and represented, secure and able to progress in a healthy, inclusive environment where rights are respected*'¹²² underpins types of good employment practice that can help employees adapt well to changes in their work environment.

Employment policies can serve to support and strengthen health, such as encouraging or mandating for employee participation in workplace changes, which can change perceptions of technology as impacting job security and highlight areas where re-training or learning support are required.¹²³ Organisations that respect the rights of their employees to shape work design can increase inclusion, work/life balance and productivity.¹²⁴

Education and skills policy is viewed as a key lever in equipping people with the basic skills, knowledge and confidence to engage with the changing and ever developing technologies in the workplace going forward.¹²⁵ As well as technical skills, a future-proofed workforce will also include employees who have the psychological flexibility to adapt to changes, as well as strong human qualities which cannot be easily replicated by machines including interpersonal skills, self-management, problem-solving individually and in collaboration with others and mental stamina.¹²⁶

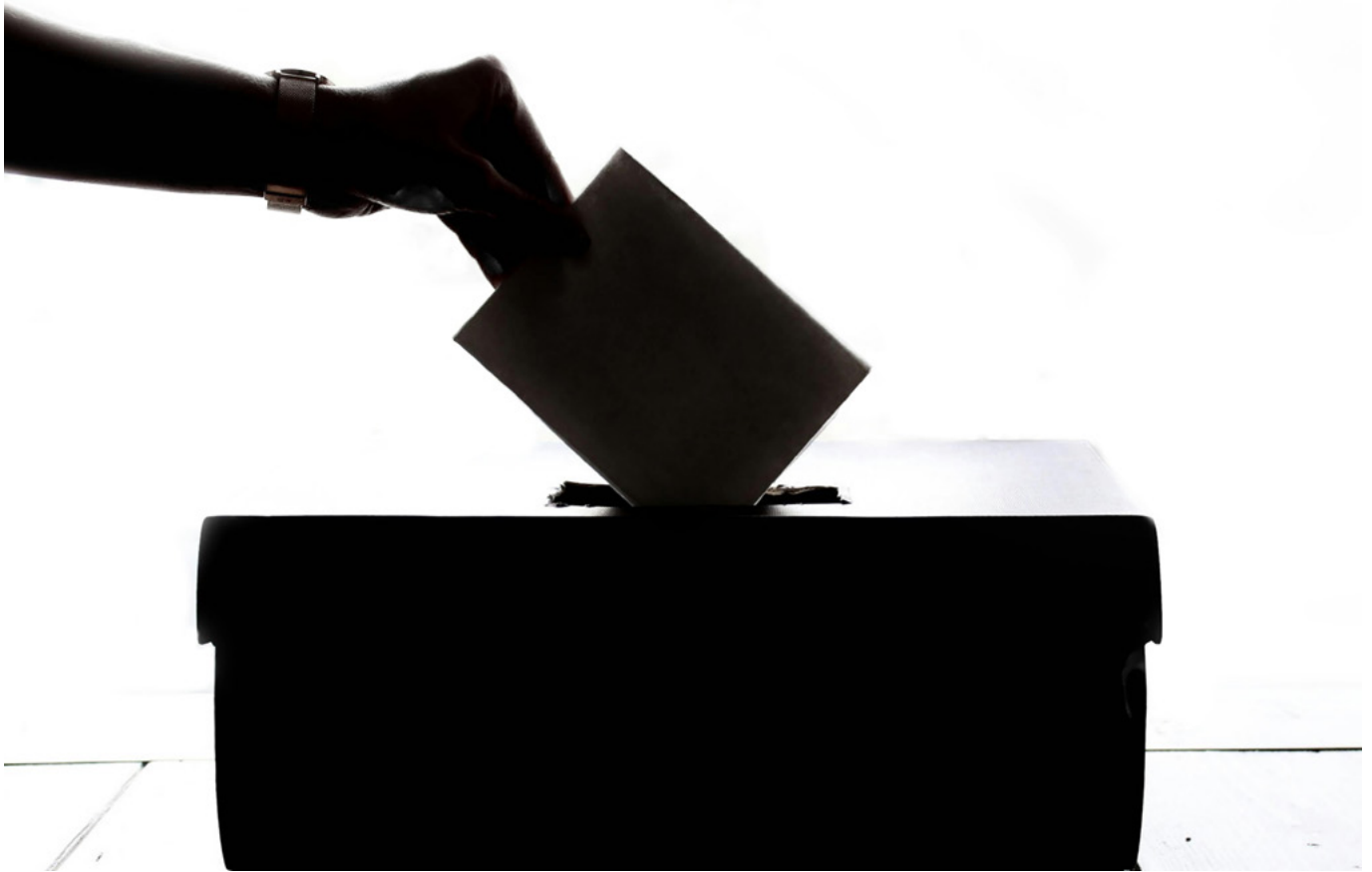
The Welsh Government have committed to recommendations made by Fair Work Commission for Wales, which reported in 2019 and last updated on progress in 2023.¹²⁷

Culture, democracy and civic participation

Trends and projections to watch

Reduced trust in institutions








- Across Europe trust in others is 40% lower in those on a low income compared with those on a high income, and this gap widened during the pandemic. Trust in the government particularly declined in those out of work and was 40% lower in 2022 in this group, than before.¹²⁸
- UK citizens' trust in political parties, the civil service, the press and the police are amongst the lowest in a group of 20 countries in the World Values Survey 2023.¹²⁹
- Those that voted in local authority elections in Wales in 2022 were confident that they were well run, however voter turnout was lower than previous elections and was lowest amongst voters aged 35 and under.¹³⁰
- According to research, only 30% of adults feel able to influence decisions affecting their local area.¹³¹ Being in good health, having a good understanding of local government and having an engaged local councillor are some of the factors underpinning this sense of agency.¹³²
- The number of people volunteering in Wales increased from 26% in 2019/20 to 30% in 2022/23, with men and those with higher levels of education more likely to volunteer.¹³³
- TV remains the most-used platform for news by adults in Wales (71%), followed by social media (52%) and other websites/apps (43%).¹³⁴ Participation in online communities and campaigns can enhance online social capital,¹³⁵ predisposing people to participate in online civic discussion and easy engagement via 'likes' and 'clicks'.¹³⁶ **Developments in AI threaten to spread misinformation and disinformation that may undermine democratic processes and lead to destabilisation.**¹³⁷
- There is growing interest and exploration of new ways of conducting democracy on a local and national level using participatory and deliberative democracy models. Examples in Wales include '[Measuring the Mountain](#)', the [Blaenau Gwent Climate Assembly](#), and the Institute of Welsh Affairs' [citizens' panel to examine the role of the media](#).



Polarisation of opinions and culture wars

- Increasing loneliness and disconnection are reducing civic engagement, weakening social cohesion and making people more vulnerable to polarisation.¹³⁸
- Growing wealth and income inequalities are another driver of social discontent and more polarisation.¹³⁹ Although global inequality (across countries) has broadly declined since the 1990's, inequality within countries has risen.¹⁴⁰
- **Generative AI-powered threats like deepfakes may intensify polarisation – threatening to undermine the legitimacy of newly elected governments and provoke civil unrest.**¹⁴¹

Impact of culture, democracy and civic participation trends on social capital

Trend	Potential futures	Potential future increases in social capital	Potential future decreases in social capital
Trust in political and civic institutions has been falling	Technology has enabled Wales to move onto a more direct democratic system with people being able to interact with public services online more.	<p>Improvements to local civic institutions involving increased public participation, possibly via new deliberative models of democratic engagement facilitate increased levels of bridging capital and social cohesion.</p> 	<p>Increased inequality and polarisation will lead to social fragmentation and silos of negative bonding capital.</p> 
Polarisation of opinions and culture wars	People's views of contentious topics have divided even further.	<p>People within specific groups are able to connect more strongly between each other and bond over their strong opinions on specific topics (bonding capital).</p>  <p>As people are really outspoken about their views, they are able to easily find a social group or a job they fit in where people hold similar beliefs (bonding and bridging).</p>  	<p>The connections holding geographical and familial communities together are eroding as people are unable to breach contentious topics with each other (bonding).</p>  <p>Tensions between groups with differing views and beliefs are high (bridging).</p> 

How could these trends impact people's lives?



Using the characters of Madiate and Emrys from the [Communities and Climate Change in a Future Wales](#) futures literacy toolkit, the following stories demonstrate how their lives and relationships might be impacted by technological changes in work and workplace design.

Despite the initial rough start, Madiate is thriving in Wales now. She finds it very open and welcoming. It is so easy for people here to access all the services they need and to contact their Local Council or government quickly.

She found it difficult and challenging at first to vote online and to constantly be involved in all the Citizens Assemblies but now she finds it empowering. People's opinions and views matter here in Wales.

Madiate has found a community of likeminded people who feel as strongly about climate and nature as her. She is really feeling at home in Wales now.

Emrys doesn't much care to participate in the government's voting and assembly projects. It seems like these spaces are created for a different type of people from other places – not for valleys boys like him.

It wouldn't make a difference anyway – it is always others making the decisions and people like Emrys bearing the consequences.

His sister is always saying how he needs to be more active and use his voice – she doesn't get it. He wishes he could have a positive outlook like hers, but things just don't work that way in the real world. He doesn't talk to her much anymore because he couldn't listen to all that.



Implications for inequalities

People who engage in civic participation including volunteering and voting in elections are more likely to be educated and in good health, therefore more likely to be prosperous.¹⁴² Social and economic inequalities lead to social fragmentation and reduction in social trust.¹⁴³ This leaves those that are disenfranchised turning away from civic engagement. Social media and AI can be used to deliberately misinform and divide, and risks driving social polarisation rather than supporting social cohesion.¹⁴⁴

Policy responses

A more accessible and inclusive electoral system – Recent changes have been made to strengthen the electoral system in Wales. These include making it easier to vote in Welsh national and local elections and extending the right to vote to 16 and 17 year olds and citizens from other countries with right to reside in Wales.¹⁴⁵ Plans to increase the numbers of Senedd members following the next election in 2026 is aimed at improving the quality of representation.

Engage the community to understand the issues¹⁴⁶ – Civic education and provision of trusted information sources are central to meaningful engagement in elections and wider civic life.

The new curriculum for Wales includes ‘active citizenship’ and ‘sustainability and global citizenship’.¹⁴⁷ The number of active global citizens in Wales is a measure of the Well-Being of Future Generations Act, which, it has been argued, provides an opportunity to ‘co-create a lifelong learning global citizenship framework to guide all education settings and workplaces in developing interventions’.¹⁴⁸

The ongoing reduction in availability of news on Welsh issues via traditional routes such as local papers and television, which was the main source of news for 75% of Welsh citizens in 2021,¹⁴⁹ is difficult for Welsh Government to address due to ‘broadcasting and other media’ being a reserved matter. However, funding has been made available via The Book Council of Wales for Welsh language news and current affairs, and more recently English language national and local journalism.¹⁵⁰ In 2020 a growing proportion of people, 46%, were accessing news via social media.¹⁵¹ Whilst this can be a useful provider of trustworthy information, due to lack of regulation misinformation and other untrustworthy content is also in circulation.

The Independent Commission on the Constitutional Future of Wales highlighted the importance of volunteering, campaigning, union membership, political party membership and volunteering as opportunities for developing political and civic understanding and improving Welsh democracy.¹⁵²

Take place-based targeted action¹⁵³ – Increase the use of new participatory and deliberative democracy models, ensuring that they are inclusive, representative and an integral part of active policy making.¹⁵⁴

Conclusion

Many future trends have the potential to shape our social connections, both positively and negatively. Technological developments are fast moving and affect us all. Our online worlds are only likely to expand, and in all aspects of our lives we will be required to interface with increasingly sophisticated technologies to access utilities, travel, finance, education and social care and health services. Changing demographics will mean a change in the make-up of our communities, presenting challenges and opportunities to our experience of co-existence.

Some of these changes, and how they are implemented, have the potential to help us address the current inequalities in society and build improved social cohesion. However, some will risk mirroring current inequalities or further deepening the divide as well as leading to further isolation and polarisation. The purpose of this exercise is to stimulate discussion, thinking and planning for those looking to strengthen community connectivity as an approach to improving health and well-being and reducing health inequalities.



Our approach

We began this work by undertaking a scoping review into the links between health, well-being, and health inequality and social capital, with a focus on social connections and participation in networks. This enabled us to appraise the types of changes that may have a bearing on social connectivity in a way that could have a health dimension.

We looked at ways that social capital is measured. The metrics selected to evidence social capital informed our place-based approach to exploring the impact of future trends on social capital. We viewed social capital through the lens of 'communities of place', defined in statutory guidance 'A More Equal Wales: The Socio-Economic Duty Equality Act 2010' as 'those who share a geographical location, for example where people live, work or spend a substantial part of their time.' Communities of interest' are defined as 'people who share an identity, such as lone parents or carers and shared experience, such as of the same local services.'¹⁵⁵

To understand how changing trends may affect the type and quality of social capital at a place-based level, consideration of physical location as well as inequalities have been included.¹⁵⁶

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